

Orientation

I. Welcome

- A. New Worker Training Background
- B. New Online Training Format Background
- C. Technology and Tools Needed
- D. Syllabus
 - 1. Programs
 - 2. Objectives
 - 3. Checklists
- E. Assessments

II. Programs

- A. Duties of an IM Worker
- B. General Overview of Each Program
 - 1. BadgerCare Plus
 - 2. FoodShare
 - 3. EBD MA
 - 4. Caretaker Supplement
 - 5. Introduction to Handbooks
 - 6. Flow of Application Process

III. Computer Resources

- A. Computer Access/Log ons
 - 1. Gateway Page
 - 2. Help on Gateway Page
 - 3. WAMS ID
- B. Systems
 - 1. CWW
 - a. Log-in Process
 - b. Home page
 - c. Navigation Menu
 - 2. CWW Training Environment
 - 3. ACCESS
 - 4. CARES Mainframe – Intro to HOD
 - 5. Demos
- C. Resources
 - 1. Learning Center
 - 2. Eligibility Management
 - 3. Process Help
 - 4. Operation Memos
 - 5. Demos
- D. Learning Tools
 - 1. Conference Calls
 - 2. Webcasts
 - 3. Captivate Demos

4. Discussion Boards

IV. Support

- A. Trainer Bios
- B. Contact Information

V. Assignments

- A. Scavenger Hunt Exercise
 - 1. Website Resources
 - 2. Other Misc Information (e.g. where are forms located at your agency)
- B. ACCESS
 - 1. Am I Eligible? In Training Environment
 - 2. Application for Benefits in Training Environment

Client Registration

I. Objectives

- A. Define the purpose of Client Registration (CR) in CWW.
- B. Recognize dates important to CR and how they impact various programs.
- C. Correctly use the match process to recognize prior contact of individuals in CWW.
- D. Determine Priority Service for FoodShare applicants.
- E. Establish requests for assistance and complete the CR process for any program/combination of programs.
- F. Define signature requirements for application and demonstrate this process.

II. Introduction

III. Business Flow – Types of Initial Customer Contacts

- A. Walk-in
- B. Phone
- C. Mail-in
- D. Online (ACCESS)

IV. Setting the Filing Date

- A. Discussion of options for each program

V. Processing Walk-in and Phone Requests for Assistance

- A. System and Process Help Overview

VI. Processing Mail-in RFAs

- VII. Processing Online RFAs**
 - A. ACCESS Practice Environment Instruction
 - B. CWW Inbox overview and processing instruction
- VIII. Priority Service Screening**
- IX. Match Process**
 - A. Merge RFA on an Open Case
- X. Am I Eligible? And Wrap-up**

PREREQUISITES

- I. Introduction to Civil Rights**
- II. Intorduction to CARES Worker Web**
- III. Ethics and Confidentiality for IM**
- IV. Customer Rights and Responsibilities for IM**
- V. Verification and Documentation for IM**
- VI. Prospective Budgeting**
- VII. Case Comments for IM**
- VIII. Child Support Overview**
- IX. ECF – The Basics**
- X. SSA Basics**
- XI. Sociograms**
- XII. CTS – The Basics and Self Study (unless taking the CTS module)**

BADGERCARE+

- I. Objectives**
 - A. Develop ability to provide information and explain BC+ Program and Policies.
 - B. Identify individuals who may be eligible for BC+.
 - C. Describe the formation of BadgerCare Plus groups.
 - D. Provide an overview of the non-financial eligibility criteria.
 - E. Provide an overview of the financial eligibility criteria.
 - F. Acknowledge limited coverage services programs.
- i. Introduction**
 - A. Background
 - B. Online Resources
 - 1. BadgerCare Plus Handbook
 - 2. System Help

3. Process Help

ii. Program Administration

- A. Application
 - 1. Who Can Apply?
 - 2. How to Apply
 - a. ACCESS
 - b. Mail
 - c. Telephone
 - d. Face to Face
 - 3. Right to Apply
- B. Valid application
 - 1. Name
 - 2. Address
 - 3. Valid Signature
 - 4. Rules for 18 yr olds
- C. Filing Date
- D. Processing Timeframes
- E. Begin Dates
- F. Backdated Eligibility
- G. Verification Requirements

iii. Non-Financial Eligibility

- A. BC + Groups
 - 1. Who is Eligible?
 - 2. Eligibility Conditions
- B. Test Group
 - 1. Members
 - 2. Special Situations
 - a. Youth Exiting Out of Home Care
 - b. Child Welfare Parents
 - c. Children <19 as the Primary Person
- C. Assistance Group
 - 1. Identify Individual Demographics
 - 2. BC+ Assistance Group Chart (BCPH 2.4)
- D. Participation Status
 - 1. Participation Status Codes
- E. Additional Non-Financial Criteria
 - 1. Wisconsin Residency
 - 2. U.S. Citizen/Qualified Immigrant
 - 3. Provide Document for Citizenship and Identity or Immigration Status
 - 4. Cooperate with Establishing Medical and Third-Party Liability

5. Sign over to the State his or her rights to payments from a third party for medical expenses
 6. Meet BC+ SSN Requirements
 7. Cooperate with Verification Request when information is Mandatory or Deemed questionable.
 8. Meet Health Insurance Access and Coverage Requirements
- F. Health Insurance Access and Coverage (BCPHB Chapter 7)
1. Health Insurance Consideration Criteria
 - a. Access to employer sponsored insurance
 - b. Exempt Individuals from health insurance access and coverage
 - c. Past Access
 - d. Current Access
 - e. Coverage
 - f. Dropped coverage
 2. Process Help Chapter 56.2
- G. Child Welfare Parents
1. Benefit Requirements
 2. Process Help Chapter 14
- H. Youth Exiting Out of Home Care (YEOHC)
1. Special status BC+ conditions for YEOHC
 2. Process Help Chapter 15
- I. Examples
- F. Financial Eligibility**
- A. Income
 1. Income limit table
 2. Gross Income
 3. Net Income
 4. Available Income
 5. Unavailable Income
 6. Earned Income
 7. Unearned Income
 8. Self Employment
 9. Exceptions to Income Being Counted
 - a. Caretakers
 - b. Test Individuals
 - B. Income Deductions
 1. Support payments
 - C. Deductibles
 1. Children
 2. Pregnant Women
 3. Deductible Exercises
 - D. BC + Extensions
 1. Earned Income Increase
 2. Child Support Increase

E. Premiums

1. Initial Payments
2. Non Payment
3. Late Payment
4. Premium Changes
5. Restrictive Reenrollment Period (RRP)
6. Premium Exercises

VI. Program Coverage

- A. BC+ Plans
 1. Standard
 2. Benchmark
 - a. BadgerRX Gold
 3. HMO Enrollment
- B. BC+ Limited Benefit Programs
 1. Emergency Services
 2. Family Planning Services (FPS)
 3. BC+ Prenatal
 4. Wisconsin Well Woman Care

VII. Program Processing

- A. Reviews
 1. Continuously Eligible Newborns (CENS)
 2. Pregnant Woman
 3. Deductibles
 4. Agency Options
- B. Verification (BCPHB Chapter 9)
 - a. Mandatory vs. Questionable
 - b. What Needs Verification Exercise Handout
- C. Hands-on, Case Processing/CARES Processing
- D. Health Care Choice
 1. Health Choice Processing
 2. Changes to Health Choice
 3. Process Help Chapter 69
 4. Covered Services Overview
- E. Change Reporting Requirements
- F. Merge RFA with Case
- G. Premium Resolutions
- H. Backdated Eligibility Practice – Additional Information
 1. Backdate Requests Received after Application Processing
 2. Benefits/Subprograms Eligible for Backdating
 3. Information/Verification Needed to Process Request

FOODSHARE

I. Objectives

- A. Gain ability to describe the formation of the Household, Food Unit, and FoodShare Group.
- B. Overview of non-financial and financial eligibility criteria.
- C. Describe the elements of benefit calculation.
- D. Demonstrate the ability to navigate the online resources.
- E. Correctly complete a FoodShare application using the CARES Worker Web (CWW) and CARES Mainframe (MF) systems.
- F. Enter case information, run eligibility, and determine whether CARES is making the correct FoodShare eligibility determination.
- G. If the eligibility determination is incorrect, review the information on the CWW screens, make the necessary changes and rerun eligibility.

i. Introduction

1. Background
2. Online Resources
 - a. FoodShare Handbook
 - b. System Help
 - c. Process Help

ii. Program Administration

- A. Application
 1. Who Can Apply?
 2. How to Apply
 - a. ACCESS
 - b. Mail (Doc1/Page1)
 - c. Telephone
 - d. Face to Face
 3. Right to Apply
- B. Valid application
 1. Name
 2. Address
 3. Valid Signature
- C. Filing Date
- D. Priority Service
- E. Processing Timeframes
- F. Verification Requirements

IV. Non-Financial Eligibility

- A. H-U-G
 1. Household
 - a. Residence

2. Food Unit
 - a. Purchase and Prepare
 - b. Relationships
 - i. Rules
 - ii. Exceptions
3. FoodShare Group
 - a. U.S. Citizen/Qualified Immigrant
 - b. SSN
 - c. Students
 - d. Intentional Program Violation
 - e. Drug Felons, Fleeing Felons
 - f. QC Sanctions

B. Examples

V. Financial Eligibility

A. Income

1. Income Limit Tables
2. Gross Income
3. Net Income
4. Available Income
5. Unavailable Income
6. Unearned Income
7. Earned Income
 - a. Self-Employment
8. Prospective Budgeting

B. Income Deductions

1. Standard Deduction
2. 20% Earned Income
3. Child Support Paid Out
4. Dependent Care
5. Shelter/Utility
 - a. Standard Utility Allowance
 - b. LIHEAP and the HSUA
6. Medical Expenses

C. Examples

1. Manual Calculation
2. Cares Worker Web

D. Ineligible/Deeming

1. No Deeming
2. Gross Deemers
3. Prorated Deemers
4. Deeming Example/Exercise

E. Categorical Eligibility

VI. Program Processing

A. EBT

1. Allotment/Benefit Issuance
 - a. Initial Allotments
 - b. Proration
 - c. Availability
2. Expedited Issuance
3. Auxiliaries/Supplements
4. Card Holder Options
 - a. Primary Person
 - b. Authorized Buyer
 - c. Alternate Payee
- B. Voluntary FSET Program
- C. Transitional FoodShare
- D. Verification (FSHB Chapter 1.2)
 1. Verification Overview
 2. What Needs Verification Exercise Handout
- E. Change Reporting Requirements
- F. Merge RFA with Case
- G. SMRF
- H. Reviews
- I. Hands-on, Case Processing/CARES Processing
- J. Break in Service Policy

EBD MA

- I. Objectives**
 - A. Define the populations served by both BadgerCare Plus (BC+) and Medicaid for the Elderly, Blind and Disabled (EBD).
 - B. Give examples of EBD non-financial criteria.
 - C. Explain the disability determination process.
 - D. Determine the EBD fiscal group.
 - E. Understand and explain asset and income eligibility criteria.
 - F. Demonstrate the ability to use online resources.
 - G. Understand the components of MAPP, Medicaid Deductibles, and the Medicare Beneficiary Program and correctly determine eligibility for these cases in CWW.
- II. Introduction to EBD-MA**
 - A. Background
 1. EBD MA
 2. Social Security
 - a. SSI
 - b. SSDI
 - c. Social Security (Retirement and survivor's benefits)
 - d. Other Points
 - B. Online Resources

1. Medicaid Eligibility Handbook
 2. System Help
 3. Process Help
- C. Discussion of Each Subprogram Key points

III. Program Administration

- A. Application
1. Who Can Apply?
 - a. Applicant
 - b. Guardian
 - c. Authorized Representative
 - d. Power of Attorney
 2. How to Apply
 - a. ACCESS
 - b. Mail
 - c. Telephone
 - d. Face to Face
 3. Right to Apply
- B. Valid Application
1. Name
 2. Address
 3. Valid Signature
- C. Filing Date
- D. Processing Timeframes
- E. Begin Dates
- F. Backdated Eligibility
- G. Verification Requirements

IV. Non-Financial Eligibility

- A. Age/Blind/Disabled
1. Disability Determination Process/Presumptive Disability Process
- B. Fiscal Test Group
- C. U.S. Citizen/Qualified Immigrant
- D. Identity
- E. Residence
- F. Social Security Number
- G. Third Party Liability
- H. Health Insurance Coverage
1. Purpose of Collecting Coverage Information

V. Financial Eligibility

- A. Assets
1. Asset Limits
 2. Asset Availability
 3. Liquid Assets
 4. Burial Assets

- 5. Property
 - B. Income
 - 1. Unearned
 - 2. Earned
 - 3. Prospective Budgeting
 - 4. Self-employment
 - C. Income Deductions
 - 1. Review of MEH 15.7
 - 2. Focus on Most Common Deductions
 - a. Court Ordered Attorney/Guardian Fees
 - b. Support Payments
 - c. Medical/Remedial Expenses
 - d. \$65 & ½ Earned Income Deduction
- VI. EBD MA Eligibility Determination**
- A. Income Limits
 - B. Categorically Needy
 - 1. Actual Shelter/Utility
 - C. Medically Needy
- VII. Deductibles and Deductible Process**
- VIII. Subprograms**
- A. Medicare Premium Assistance
 - 1. QMB
 - 2. SLMB
 - 3. SLMB+
 - 4. QDWI
 - B. Medicaid Purchase Plan (MAPP)
 - 1. Premiums
 - C. Special Status Medicaid
 - 1. How to Identify
 - a. 503 Eligibility
 - b. Disabled Adult Child
 - c. Widows & Widowers
 - d. 1619 Cases
 - e. Katie Beckett
 - D. Long Term Care Cases
 - 1. How to Identify
 - a. Family Care
 - b. Waivers
 - c. Institutional
 - d. IRIS
- IV. Program Processing**
- E. Reviews

- F. Hands-on, Case Processing/CARES Processing
- G. Health Care Choice
 - 1. Health Choice Processing
 - 2. Changes to Health Choice
 - 3. Process Help Chapter 69
 - 4. Covered Services Overview
- D. Verification (MEHB Chapter 20)
 - c. Mandatory vs. Questionable
 - d. What Needs Verification Exercise Handout
- A. Change Reporting Requirements
- B. Merge RFA with Case
- C. Backdated Eligibility Practice – Additional Information
 - 1. Backdate Requests Received after Application Processing
 - 2. Benefits/Subprograms Eligible for Backdating
 - 3. Information/Verification Needed to Process Request
- D. Estate Recovery

CTS

- I. Objectives**
 - A. Be able to provide information and explain the CTS Program and Policies
 - B. Overview of non financial eligibility criteria
 - C. Overview of the financial eligibility criteria
 - D. Recognize exceptions to policies
 - E. Understand the impact of CTS in the CWW system
- II. Introduction**
 - A. Background
 - B. Online Resources
 - 1. Caretaker Supplement Handbook
 - 2. System Help
 - 3. Process Help
- III. Program Administration**
 - A. Application
 - 1. Who Can Apply?
 - 2. How to Apply
 - a. Mail
 - b. Telephone
 - c. Face to Face
 - 3. Right to Apply
 - B. Valid Application
 - 1. Name
 - 2. Address
 - 3. Valid Signatures

- C. Filing Date
 - D. Processing Timeframes
 - E. Begin Dates
 - F. Backdated Eligibility
 - G. Verification Requirements
- IV. Non-Financial Factors**
- A. U.S. Citizen/Qualified Immigrant
 - B. Verification
 - C. Standard Filing Unit
- V. Financial Testing**
- A. Asset Policy
 - 1. Liquid Asset
 - 2. Vehicles
 - 3. Divestment
 - B. Income Testing
 - 1. Income Limits
 - 2. Income Disregards
 - a. Earned Income of a Minor
 - b. Counting Child Support Income
 - c. Budgeting Child Support
 - d. Supporting Others
 - e. \$30 & 1/3 Earned Income Disregard
 - f. Lump Sum Income
 - 3. How to Calculate/Budget Income
- VI. Program Processing**
- A. Hands-on CWW Processing
 - 1. CTS Applications
 - a. CWW Activity
 - b. CTS Payments
 - c. CTS Benefit Issuance
 - B. Exceptions to the SFU Rule
 - 1. Multiple AGs vs. Multiple Cases
 - 2. Non-Marital Co-Parent Impact on Financial Eligibility
 - C. Verification
 - 1. What Needs Verification Exercise Handout
 - D. Change Reporting Requirements
 - E. Merge RFA with Case
 - F. Case Transfers
 - G. Overpayments
 - H. Manual Payments
 - I. Lost Payments
 - J. Reviews/Certification Periods

General Ongoing Case Maintenance

I. Objectives

- A. Demonstrate the ability to access, interpret, and take appropriate actions to successfully resolve alerts.
- B. Describe how the customer and worker are notified that a review is due.
- C. Access, create, and identify Notices & Letters.
- D. Demonstrate the linking and merging process between ACCESS and CWW.
- E. Gain knowledge to access and utilize online resources such as SAVE, Electronic Case File (ECF), and Automated Case Directory (ACD).
- F. Review processing timeframes, verification requirements, and change report processing as part of combined case maintenance.
- G. Gain an understanding of the review process, verification requirements at review, and review processing timeframes as part of combined case maintenance.
- H. Develop a general understanding of the Benefit Recovery Process and policies related to Fraud and Intentional Program Violations (IPVs).
- I. Gain awareness of the Fair Hearing Process and resources available for further information.
- J. Become familiar with the concepts of Data Exchange for use in case maintenance.
- K. Become familiar with general navigation in the KIDS system.
- L. Gain a familiarity with the case transfer process and procedure.
- M. Increase awareness of CWW resources and tools.
- N. Become comfortable with navigating in the Interchange system (does not apply to workers who will maintain FS only caseloads).
- O. Describe the process and policies related to Self Employment and demonstrate the ability to correctly budget Self Employment income and expenses.

II. General Introduction to Ongoing Case Maintenance

III. Introduction to Alerts

- A. Accessing Alerts
- B. Worker Generated Alerts
- C. System Generate Alerts
- D. Interactive Practice: Resolving Alerts

IV. Notices Concepts

- A. Notices in CWW
 1. What generates a notice?

2. Accessing and viewing history
3. Suppressing notices
- B. Letters in CARES
 1. Standard Letter (CNSL)
 2. Free Format Letter (CNFL)
- C. Manual Notices

V. ACCESS

- A. Introduction to ACCESS
- B. ACCESS Handbook
- C. Exercise in ACCESS Training Environment
- D. Linking vs. Merging
- E. Linking and Merging Case Practice

VI. Combined Case Maintenance

- A. Introduction
- B. Processing Timeframe Review
- C. Proper Use of Dates
- D. Verification Requirements across Programs
- E. Notes of Impact
 1. Combined FS/EBD MA Cases
 - a. Shelter/Utility Expense Impact on EBD MA Income Limit
- F. Change Processing on a Combined Caseload
 1. Case Scenario Exercise
- G. Review Processing
 1. Case Scenario Exercise
- H. Case Transfer Process
 1. Agency Transfer Process
 - a. Preparing a Case for Transfer
 - b. Exceptions
 2. Caseload Assignments

VII. Online Resources

- A. Electronic Case File
 1. ECF Handbook
 2. Accessing ECF
 3. Document Code List
- B. SAVE
 1. SAVE Handbook
 2. Background
 3. When to Use?
 4. Accessing SAVE
 5. Primary Verification Process
 6. Secondary Verification Process
- C. Automated Case Directory
 1. Accessing the ACD

2. Common Uses

VIII. KIDS Basics

- A. Accessing the KIDS system
- B. Navigation Exercise
 - 1. Child Support Received
 - 2. Child Support Obligation
 - 3. KIDS Notes
- C. Interactive Practice: Updating CWW with KIDS data.

IX. Self Employment

X. Data Exchange

XI. Fraud & Intentional Program Violation (IPV)

XII. Benefit Recovery (BV) Overview

XIII. Introduction to Fair Hearings

- A. General Overview
- B. Link to more Extensive Training Materials

XIV. CWW: Resources and Tools

- A. Help
- B. Queries
- C. Simulation

XV. Interchange

- A. MMIS Online Handbook
- B. Accessing Interchange
- C. MMIS Online Screens
- D. WSSI Online Screens

XVI. Maintaining a Caseload

- A. General Information
- B. Prioritizing Tips
- C. Best Practices
- D. Conclusion