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**State of Wisconsin
Governor Jim Doyle**

**TO: Economic Support Supervisors
Economic Support Lead Workers
Training Staff
Child Care Coordinators
W-2 Agencies
Workforce Development Boards
Job Center Leads and Managers**

**FROM: Janice Peters
W-2 Policy Section
Bureau of Wisconsin Works
Division of Workforce Solutions**

DWS OPERATIONS MEMO					
No: 06- 27					
DATE: 06/02/2006					
FS	<input type="checkbox"/>	MA	<input type="checkbox"/>	SC	<input type="checkbox"/>
CTS	<input type="checkbox"/>	CC	<input type="checkbox"/>	W-2	<input checked="" type="checkbox"/>
FSET	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input type="checkbox"/>
JAL	<input type="checkbox"/>	JC	<input type="checkbox"/>	RAP	<input type="checkbox"/>
WIA	<input type="checkbox"/>	Other	<input type="checkbox"/>	EP	<input type="checkbox"/>
PRIORITY: HIGH					

SUBJECT: Wisconsin Works (W-2) Move Placements Project

CROSS REFERENCE: *Wisconsin Works (W-2) Move Placements Project (DWS Administrator's Memo 06-05)
W-2 Move Placements Project – Conversion Process (Operations Memo 06-20)
New Case Management CARES Code for the Unsubsidized Employment Rung of the W-2 Ladder (Operations Memo 06-22)
New W-2 Backdating and Future-Dating Policy (Operations Memo 06-23)*

EFFECTIVE DATE: June 5, 2006

PURPOSE

The purpose of this memo is to provide information on the Wisconsin Works (W-2) Move Placements Project and the manner in which the Department of Workforce Development (DWD) will implement this system enhancement in the Client Assistance for Reemployment and Economic Support (CARES) system. The Move Placements Project will be integrated into the CARES system the weekend of June 2, 2006.

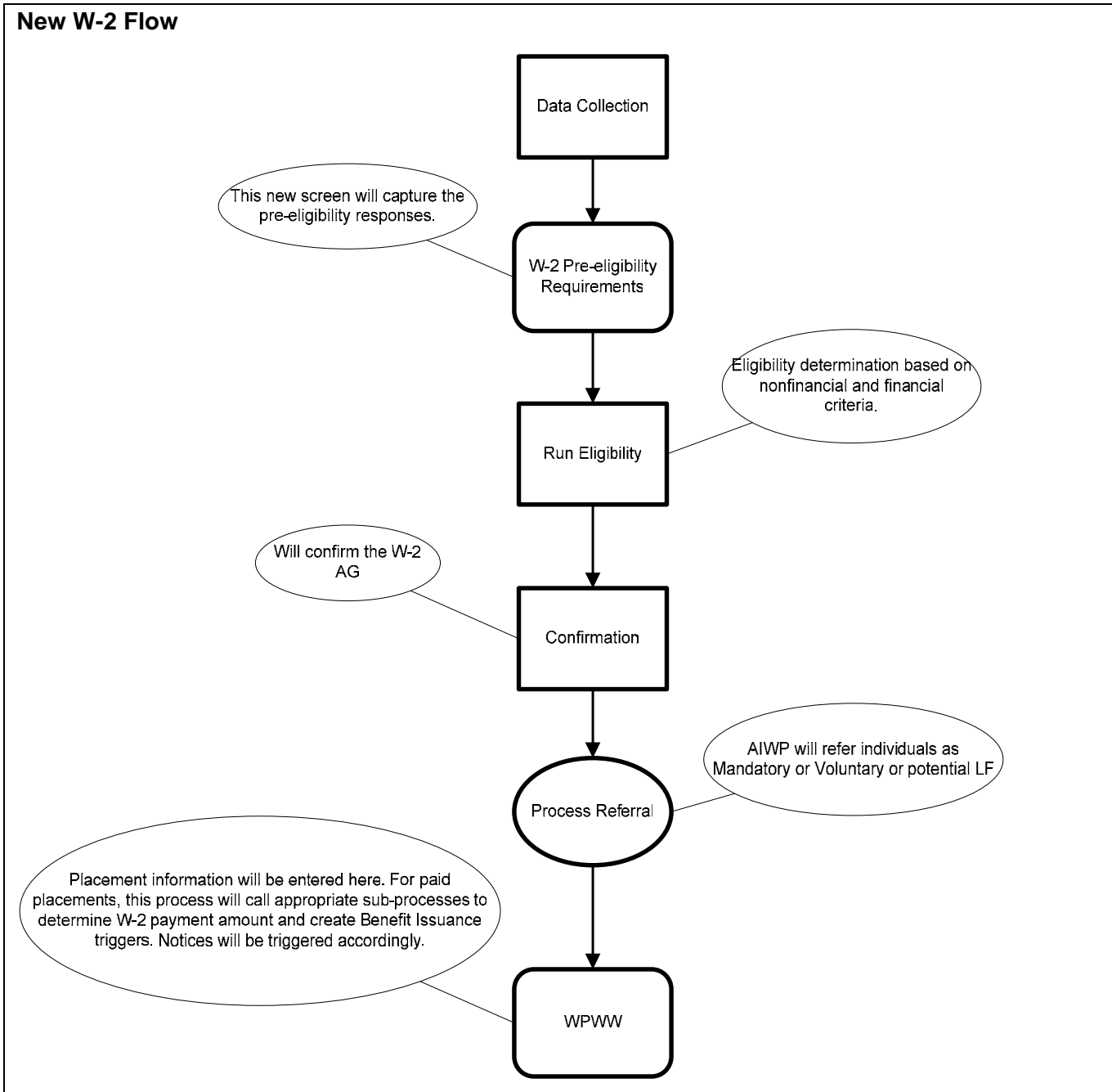
BACKGROUND

This project, which includes moving the page where W-2 placement decisions are entered to the Work Programs (WP) subsystem in CARES, will correct a longstanding problem in the design of CARES W-2 programming. Currently, CARES requires placement of a W-2 participant in a W-2 employment position before eligibility can be determined. This was a compromise design, based on the predecessor program, Aid to Families with Dependent Children (AFDC).

This design has been counter-intuitive and error-prone since it went into production. The current design often results in W-2 Financial and Employment Planners (FEPs) not knowing with certainty that an initial placement and payment were going to be issued correctly by the system. Similarly, when placements change, the current design requires the eligibility logic to be re-run even though no eligibility conditions have changed. Lastly, when eligibility ends, W-2 placements are not always ended correctly resulting in overpayments to the participant.

OVERVIEW OF PROJECT

W-2 eligibility is based on non-financial and financial criteria. By policy, once eligibility has been determined, the W-2 placement decision is then based on a thorough assessment of the individual's situation by the Financial and Employment Planner (FEP) and should be done separately from the eligibility determination process. The Move Placements Project will allow CARES to support W-2 policy by delinking the determination of financial and non-financial eligibility from placement decisions. With the new model, W-2 placements and payment calculations are moved to the Work Programs (WP) subsystem in CARES and will be done after W-2 eligibility is determined and confirmed, and the referral is processed on AIWP. This separates placement from W-2 eligibility determination and confirmation and treats the placement decision as a function of Work Programs case management. The "New W-2 Flow" Diagram illustrates these changes.



The remainder of this memo discusses in detail more specific changes that have been made to W-2 program eligibility processing, the Work Programs referral process, the Work Programs subsystem and W-2 notices and letters under the Move Placements Project.

W-2 ELIGIBILITY PROCESS/CHANGES

CARES SCREEN ACEO (W-2 POTENTIAL ELIGIBILITY OPTIONS)

W-2 staff should continue to use ACEO to conduct an initial informal job readiness assessment using the informal assessment driver flow in the WP subsystem for an applicant prior to determining W-2 eligibility. Continue to use CARES screen ACEO after the individual(s) has passed clearance on CARES Worker Web (CWW). ACEO will no longer be accessible after the W-2 AG has been confirmed open on AGEC and AIWP is processed.

ELIGIBILITY DETERMINATION DRIVER FLOW CHANGES

The AE driver flow in CWW and the Mainframe will essentially remain the same. However, there are a few changes in the driver flow that you will notice.

1. The W-2 Information page will no longer be scheduled in CWW. In its place is the new W-2 Pre-eligibility Requirements page. It is the first page in the W-2/Child Care Section of the Navigation Menu. The page is required to be completed in the Intake and Program Add driver flows for W-2. The page will not be scheduled in the Person Add or Review Driver flows for Ongoing W-2 cases.
2. ACTP (Two-Parent Determination) will no longer be scheduled after AGECE in the “post confirmation” driver flow. The new W-2 Two Parent Determination screen, WPTP, will be entered after WPWW if the AG has two eligible parents.
3. AIWP will now be scheduled after W-2 is confirmed on AGECE, whether FS are confirmed. In the past, AIWP was only scheduled after all AGs were confirmed on AGECE.
4. The following Mainframe transactions will be inactivated with the implementation of the Move Placements Project: ACWI (becomes WPWW), ACTP (becomes WPTP), AQWI (becomes WPPS) and ASCO.

HOUSEHOLD RELATIONSHIPS

In order to be determined eligible for W-2, a parent must be designated as the custodial parent. A custodial parent is a parent who, with respect to a dependent child, resides with that child and, if there has been a determination of legal custody with respect to the dependent child, has legal custody of that child. In the absence of a determination of legal custody, it is assumed that a parent has legal custody.

In the past, W-2 required that two questions on the Household Relationships page be completed for W-2 eligibility; “Is Caring for (Name)” and “Has Legal Custody of (Name).” The question “Is Caring for (Name)” will no longer be required for W-2 on the Household Relationships page.

Therefore, on the Household Relationship page, the “*Has Legal Custody of Reference Person*” field must be yes for all appropriate children in the W-2 assistance group (AG). If a determination of legal custody has been made and the reference person does not have legal custody of any of the children in the AG, then CARES will fail eligibility for W-2. If the reference person does not have legal custody of a child in the W-2 AG, it will determine that child to be an excluded child (XC).

Example 1: Mom applies for W-2. She lives with her husband and they have two children in common. For both children, the FEP must enter Y in the “*Has Legal Custody of Reference Person*” field.

Example 2: Mom applies for W-2. There are no other adults in the household. She has legal custody of one child (Child A) and the child resides with her. Her ex-husband was granted legal custody of her other child (Child B) even though Child B lives with her Mom 3 days a week. For Child A, the FEP must enter Y in the “*Has Legal Custody of Reference Person*” field. For Child B, the FEP must enter N in the “*Has Legal Custody of Reference Person*” field.

Example 3: Mom applies for W-2. There are no other adults in the household. She has legal custody of one child (Child A) and the child resides with her. She and her ex-husband were granted joint custody of her other child (Child B). Therefore, using guidance in the Income Maintenance Manual, Chapter 1, Part A, 5.0.0, the FEP determines that the primary caretaker is the ex-husband. Based on that information, the FEP enters a Y in the “*Has Legal Custody of Reference Person*” field for Child A and an N for Child B.

In most instances, this has been incorrectly marked for Custodial Parent of an Infant (CMC) cases. If the newborn is the only child in the home and legal custody is not indicated, the parent will be ineligible for W-2. Furthermore, if there are other children in the home and legal custody has been marked correctly for them, but it is not marked correctly for the newborn, the newborn will be determined to be an excluded child rather than an eligible child.

Please note that the response to the question "Is Caring for (Name)" is still required to be completed when setting the FoodShare Employment and Training (FSET) Exemption Reason for a person who provides the majority of care to a child under age six. The dependent child does not have to be in the FoodShare (FS) group, or be living with the FS group/person.

DRUG FELONS

Currently, if verification is missing or not verified on the Drug Felon page, W-2 eligibility pends or is denied. With the Move Placements Project, CARES will not know if a single parent (or which parent in a two-parent household) will be placed in a paid placement at the time of the eligibility determination. Therefore, W-2 eligibility will pass if all other eligibility conditions are met, but CARES will not allow a paid placement on WPWW until the drug felon information is verified.

W-2 PRE-ELIGIBILITY REQUIREMENTS PAGE

The W-2 Pre-Eligibility Requirements Page replaces the W-2 Information Page in CWW. The purpose of the new page is to collect information about pre-eligibility requirements, such as up-front workforce attachment activities assigned to a W-2 applicant. It is very important that the page is completed correctly because pre-eligibility requirements may affect a W-2 AG's eligibility. The questions on the page are asked at the case level, not the individual participant level.

Entries or changes made to the page may only be made for the month of application and the following month. After that time, the page is protected from further entries. If there is a change made to the response of either of the pre-eligibility requirements questions during those two months, CARES will send an alert to the FEP ID listed on the page.

Pre-Eligibility Requirements - Microsoft Internet Explorer

User ID: XCT548 User Name: P JANSSEN Quick Select: CASE/RFA Go Help Logout

Primary Person: GEORGIA MADISON 35F PP Case: 7700389179 Status: Pending Mode: Intake 03/29/2006

W-2 Pre-Eligibility Requirements Cancel Reset

Effective Period

* Begin Month: 03 / 2006 End Month: Last Updated: 03/29/2006

Delete Reason:

Additional Information

Sequence: 1

FEP Interview Date: MM / DD / YYYY

FEP ID: FEP Name:

Are there any pre-eligibility requirements? Have the pre-eligibility requirements been met?

Sequence Updated on or before

MM / DD / YYYY Go

Cancel Previous Next

Begin Month: Enter the MM/CCYY of the application. Do not use the month the pre-eligibility information is entered if it is different from the application month.

Begin Month is the only field that must be completed in order to move past the page. This may result in someone else creating a “blank” page prior to the FEP meeting with the individual. FEPs should not create a new sequence for the same time period when completing a W-2 Pre-eligibility Requirements page started by another staff member.

End Month: CARES automatically enters the End Month when there is no open or pending W-2 eligibility for the past two consecutive months.

Delete Reason: The only valid delete reason is AE (agency error).

Sequence: CARES automatically determines the sequence of the page.

FEP Interview Date: Enter the first date the applicant meets with the FEP. This date cannot be a future date.

FEP ID: Enter the FEP ID of the worker assigned. The FEP ID will then be auto-populated on WPWW. Alerts concerning eligibility are sent to the worker listed in FEP ID. When an ID is entered in this field, CARES displays the name of the person associated with the ID next to FEP Name. If the FEP ID is changed on WPWW, the “FEP ID” listed here will be updated, even after the page is protected.

Are there any pre-eligibility requirements?: Enter Yes or No. If the answer is No, then a response to the "Have the pre-eligibility requirements been met?" question cannot be entered.

Have the pre-eligibility requirements been met?: Enter Yes, No or question mark. If the answer to the previous question is Yes, this field must be entered. If the answer is Yes, W-2 eligibility passes. If the answer is No, the W-2 eligibility fails. A question mark pends W-2 eligibility.

If neither question (“Are there any pre-eligibility requirements?” or “Have the pre-eligibility requirements been met?”) is entered, W-2 eligibility pends.

W-2 Pre-eligibility Requirements History

The conversion process running prior to Move Placements implementation creates the history pages for this page. Converted history displays the most recent month of data related to the pre-eligibility requirements for W-2, however, after conversion there will be a record each time a worker enters the screen.. See [Operations Memo 06-20](#) for further information on the Conversion Process.

REFERRAL PROCESS CHANGES

W-2 AND FOODSHARE EMPLOYMENT AND TRAINING (FSET) CASES

Currently, AIWP is able to determine a person's W-2 or FSET work program registration status because the placement decision is known prior to referral. However, with the Move Placements Project, since the placement decision is not known prior to referral individuals will be referred to the WP subsystem as potentially mandatory for both programs. The office defaults to the W-2 office. Once a placement is made on WPWW, the registration code updates to the correct status for each program on WPWI.

In most cases, the FEP will not have to reprocess AIWP in order to change from one placement type to another or to move from the W-2 office to the FSET office. However, if a participant is placed in an unpaid placement on WPWW and enrolled in the FSET office as Mandatory, before the participant can be changed to a paid placement, the FEP needs to follow these steps:

1. Tran to AIWP and change the W-2 Reg. Code from E to V and space out the Exemption Reason and process the referral.
2. Transfer the individual from the FSET office to the W-2 office on WPWI.
3. Make the placement change on WPWW.

Prior to Move Placements WW P (pregnant woman with no minor children), WW M (minor parent), or WW N (non-custodial parent) would not have been referred over to the WP subsystem because they would have been determined to be exempt. Now these case would be referred as voluntary.

AIWP will continue to set all exemption codes for FSET. The PA (participating in another program) exemption code for FSET will auto-populate on AIWP after a participant is placed in a paid placement on WPWW. If a participant is placed in an unpaid W-2 placement and receiving FS, the referral for W-2 will now be voluntary for work programs.

If a W-2 only participant is referred to WP and no placement is entered within ten days from the W-2 request date on the W-2 Program Request page, an alert will be sent to the FEP and WP case manager.

LEARNFARE

The process for referring Learnfare children to Work Programs will continue to function as it currently does with some minor changes. A child who is not in good standing as entered on AILW will be identified as a "potential" Learnfare child and will be referred to WP with a registration code of K since there is no placement information for the parent. CARES will prevent enrollment of these children until a placement is made. If a parent is placed in an unpaid placement, the child will be automatically removed from the enrollment list. If a parent is placed in a paid placement, the child's WP Registration status will be updated to L and the Case Manager will receive an alert to enroll the Learnfare child.

W-2 WORK PROGRAMS SUBSYSTEM CHANGES

NEW WORK PROGRAMS SCREENS

Moving the process of entering placement information to the WP subsystem has created several new screens. The new screens are responsible for many of the tasks that used to be a part of Application Entry and ED/BC, such as payment calculation, payment issuance triggers, and notices. The new screens are in addition to the informal assessment screens, which are required to be completed prior to any placement with the exception of CMC (Caring for Newborn) placements.

MNWE (Work Programs Submenu E)

MNWE is a new menu that lists all of the new WP screens created as part of the Move Placements Project and their parms.

```

MNWE                                WORK PROGRAMS SUBMENU E                06/30/06 08:15
                                      XID123 A WORKER
FUNCTION
NUMBER      FUNCTION DESCRIPTION      TRAN      PARAMETERS (PARMS)
 1 - WISCONSIN WORKS INFORMATION      (WPWW)    CASE/(MMDDYY)
 2 - W-2 PLACEMENT SUMMARY            (WPPS)    CASE
 3 - W-2 POTENTIAL PAYMENT AMOUNTS    (WPPA)    CASE
 4 - W-2 TWO PARENT PARTICIPATION      (WPTP)    CASE/(MMDDYY)

*** PLEASE ENTER THE NUMBER OF THE DESIRED FUNCTION ____
PARMS: _____

NEXT TRAN: MNWE    PARMS: Blank
    
```

WPWW (Wisconsin Works Information)

WPWW replaces the W-2 Information Page as the location where W-2 placement information is entered. WPWW is accessed using the case number, not a PIN number, as other work programs screens require.

- **Note:** An Employability Plan (EP) may be created without a placement on WPWW. This allows workers to create an EP for up-front activities before placement decisions are made.

```

WPWW                                WISCONSIN WORKS INFORMATION                05/15/06 08:37
CASE: 0011544001                    XID123 A WORKER
LAST UPDATED: 05 15 06
DC: ____                               SEQ NUM: 001
CASE MANAGER: XID123                 FEP ID: XID123                            PRIMARY WORKER: XID234

INITIAL W-2 ELIGIBILITY DATE: 01 04 2006
W-2 BEGIN DATE: 01 10 2006           W-2 END DATE: ____ ____ ____

PARTICIPANT PIN: 1234567890
NAME: FIRSTADULT                     M LASTNAME

PLACEMENT: CMF CASE MGMT FOLLOW UP
PLACEMENT BEGIN DATE: 05 15 2006     PLACEMENT END DATE:

-----INDIVIDUALS ELIGIBLE FOR PLACEMENT-----
NAME: FIRSTADULT                     M LASTNAME                               PIN: 1234567890
NAME: SECONDADULT                    M LASTNAME                               JR    PIN: 2345678901

PF13 NEW EPISODE
NEXT TRAN: WPWW    PARMS: Case Number
    
```

Case Manager: CARES auto-populates the Case Manager ID from WPWI.

FEP ID: If a “FEP ID” was entered on the W-2 Pre-eligibility Requirements page, it displays here. If no FEP ID is displayed, enter it here. Any changes made to the “FEP ID” on WPWW will be auto-populated on the W-2 Pre-eligibility Requirements page.

Primary Worker: CARES auto-populates the ID of the worker assigned on the CWW Additional Data Page (or Case Summary Page).

Initial W-2 Eligibility Date: CARES auto-populates the date that W-2 eligibility began.

W-2 Begin Date: Enter the date that the initial W-2 placement first began. The Initial W-2 Eligibility Date and the W-2 Begin Date do not have to match. There are a number of screen edits related to backdating and future-dating dates on WPWW. See [Operations Memo 06-23](#) for new backdating and future-dating instructions.

W-2 End Date: Enter the W-2 End Date only when eligibility or the request for all W-2 placement services, including case management, has ended. Do not enter a W-2 End Date when making a placement change. When the FEP (or CARES batch program) enters a W-2 End Date, CARES will change the W-2 request on the W-2 Request page to No. The next time eligibility is run on the case, the W-2 AG will close.

If W-2 eligibility ends for a non-financial or financial reason, and the worker does not end the W-2 episode by entering a W-2 End Date on WPWW, CARES will automatically end the episode at the end of the second month after eligibility ends. The end date will be the last day of the last participation period for which a payment was issued.

Exception: CMF placements will stay open on WPWW if W-2 eligibility ends.

If a participant's clock has expired and the worker has not entered an extension or taken any other action by the last day of the month, CARES automatically ends the W-2 episode as of the last day of the month.

There are a number of screen edits related backdating and future-dating dates on WPWW. See [Operations Memo 06-23](#) for new backdating and future-dating instructions.

Participant PIN: Enter the PIN of the individual being placed in a W-2 placement. (Note: It is not the short-list number of the person.) The PIN for each individual eligible to be placed is located at the bottom of the screen. To change the placed individual, type over the existing PIN, enter a new placement as appropriate and Placement Begin Date and press <enter>.

The FEP should also review the participant's EP and assigned activities and update them accordingly. If the case is a two-parent case CARES will now prevent the second parent's activities from being marked as sanctionable on WPCS. If the second parent becomes the placed parent, the FEP must change the sanction indicator for any components on WPCH that will continue from N to Y.

Individuals Eligible For Placement: The list of individuals at the bottom of the page includes all eligible adults and any eligible child who has been selected as a target as a minor parent.

Name: After the FEP enters the PIN of the individual and presses <enter>, CARES displays the person's name, including first, middle initial, last and suffix.

Placement: Enter a valid placement code. CARES uses this field to determine the payment amount, if any. To change the placement type, type over the existing placement code. See [Operations Memo 06-22](#) for information on the new placement type CMD.

Placement Begin Date: Enter the date the placement begins. For an initial W-2 placement, the W-2 Begin Date and the Placement Begin Date must be the same. There are a number of screen edits related backdating and future-dating dates on WPWW. See [Operations Memo 06-23](#) for new backdating and future-dating instructions.

Placement End Date: If the FEP (or CARES Batch program) enters a W-2 End Date or the FEP changes the placement type, CARES automatically enters a Placement End Date. See [Operations Memo 06-23](#) for more information on W-2 Placement End Dates.

To create a new sequence of WPWW, use PF13. A new sequence should only be created if the W-2 episode ended and the individual has re-applied for W-2, been found eligible, and an adult has been assessed to be appropriate for a W-2 placement.

The PF24 functionality that existed between WPWI and AIWP will be in place between WPWI and WPWW.

WPWW SCREEN EDITS

- WPWW cannot be completed until eligibility has passed, been run, confirmed and a referral has been made through AIWP.
- A paid placement cannot be entered if either parent in a two-parent household, or a single parent, has an expired 60-month clock and no extension has been granted.
- See [Operations Memo 06-23](#) for additional screen edits related to backdating.

ALERTS GENERATED FROM WPWW

- W-2 PAYMENT CHANGED – RUN SFEX -- This alert is sent to the worker listed in the PRIMARY WORKER field when a placement begins, changes or ends on WPWW. It is meant to prompt the worker to run eligibility to process the change to the W-2 payment amount or status for FoodShare benefits.
- PLEASE ENTER W-2 PLACEMENT – If a potential W-2 participant is referred to WP through AIWP and no placement is entered within 10 calendar days of the W-2 request date on the W-2 Program Request page, CARES sends this alert to the WP Case Manager listed on WPWI. This alert will also be sent to the FEP listed on the W-2 Pre-eligibility Requirements page or WPWW if the FEP ID is different from the Case Manager ID.
- W-2 ENDED - PLEASE DISENROLL – When W-2 eligibility ends, an alert is sent to disenroll the participant or transfer the participant to the new office (if W-2 to FSET).
- W-2 CHANGE - CHECK OFFICE NUM – When a placement changes from paid to unpaid, this alert is sent to disenroll the participant or transfer the participant to the new office (if W-2 to FSET).

WPTP (W-2 Two-Parent Participation)

WPTP replaces CARES screen ACTP as the screen where two-parent household status is determined. A worker can either tran to WPTP or CARES will automatically “drive” to WPTP after WPWW and WPPA if there is a paid placement on WPWW and there are two eligible adults in the case. The screen will continue to function similarly to ACTP. If there is not a record for the current month, the worker will need to enter the month to update the screen.

The PIN, first name and last name of all eligible individuals in the W-2 case are listed at the bottom of the page.

WPTP	W-2 TWO PARENT PARTICIPATION	06/12/06 11:28
		XID123 A WORKER
CASE: 1548050048		
UPDATED DATE: 06 02 2006		
EFF MMCCYY: 062006		
1.	ARE TWO ELIGIBLE ADULT PARENTS PRESENT IN THE W-2 AG ?	Y
2.	IS CHILD CARE AUTHORIZED ?	Y
3.	IS A PARENT A DISABLED ADULT FOR W-2 ?	N
3A.	PIN NUM OF DISABLED ADULT: _____	
4.	IS A PARENT CARING FOR A SEVERELY DISABLED CHILD IN THE W-2 AG ?	N
4A.	PIN NUM OF CARETAKER PARENT: _____	
4B.	PIN NUM OF DISABLED CHILD: _____	

5.	TWO PARENT HOUSEHOLD RESULTS: Y	
-----INDIVIDUALS-----		
2505214156 ADULT 1 2548125489 ADULT 2 2546847541 CHILD 1 2154685459 CHILD 2		
PF13: NEW EPISODE PF24: PROCESS SCREEN OR ENTER		
NEXT TRAN: WPTP PARS: Case Number		

EFF MMCCYY: Enter the month and year that the two-parent household status is being determined. WPTP must be updated if a change was made on WPWW and the effective month is not the current month. Use PF13 to create a new determination.

- Are Two Eligible Adult Parents Present in the W-2 AG?:** CARES automatically answers this question Y or N. If the answer is N, no other information can be entered on the screen.
- Is Child Care Authorized?:** CARES automatically answers this question Y or N if the answer to the previous question is Y. CARES populates Y if there is an authorization in either the current month or the next month in CSAW.
- Is A Parent A Disabled Adult for W-2?:** Enter Y or N based on the W-2 policy manual definition of "disabled adult." Remember that if one of the parents is receiving SSI or SSDI, the case is not processed as a two-parent case and WPTP will not display. This entry is for capturing information about a parent receiving one of the other types of disability payments.

If there is a parent considered to be a disabled adult, enter that person's pin number in 3A. PIN NUM OF DISABLED ADULT.

- Is A Parent Caring for a Severely Disabled Child in the W-2 AG?:** Enter Y or N based on W-2 policy manual definition of "severely disabled child." If the answer to this question is Y, enter the parent's PIN (4A. PIN NUM OF CARETAKER PARENT) and the child's PIN (4B. PIN NUM OF DISABLED CHILD)
- Two Parent Household Results:** CARES automatically determines whether this is a two-parent family based on the answers to questions 1-4 after the worker presses <enter>. PF24 processes the information. Y indicates this is a two-parent household. N indicates it is not a two-parent household.

➤ **NOTE:** Review the Two-Parent Participation Policy in the [W-2 Manual 2.2.5](#).

WPPA (W-2 Potential Payment Amounts)

WPPA allows query access to potential W-2 payment information. W-2 payment information for a confirmed W-2 assistance group (AG) will no longer display on the Confirmed Assistance Group Summary Page, the W-2 budget screens in ED/BC, or AGECE. The purpose of WPPA is to display W-2 payment amounts that have been calculated but not issued as of the current date. This screen will display information on a point-in-time basis as of the date it is accessed. There may be one, two, or three payment amounts listed, depending on when the placement began. Once a payment is issued it will no longer display on WPPA. If there are no potential payments, WPPA will display Informational Message 701 - NO DATA FOUND FOR TRAN/PARMS ENTERED.

- **Note:** The actual payment amount received could differ from the amount displayed on WPPA due to non-participation hours, drug felon penalties, recoupments or learnfare penalties.

WPPA		W-2 POTENTIAL PAYMENT AMOUNTS			09/20/06 03:22	
CASE: 0123456789					XID123 A WORKER	
PP NAME: FIRST		LASTNAME			SUF	
PARTICIPATION BEGIN DATE	PARTICIPATION END DATE	ESTIMATED PAY DATE	GROSS PAY AMOUNT	PRORATED PAY AMOUNT	PLACEMENT	
09 18 2006	09 30 2006	10 10 2006	673.00	291.63	CSJ	
10 01 2006	10 15 2006	11 01 2006	673.00	336.50	CSJ	
10 16 2006			673.00		CSJ	
PF13 WPPS						
NEXT TRAN: WPPA		PARMS: Case Number				

Because this is a query-only screen, any worker with access to CARES WP screens will be able to view this information. A worker may either Tran to WPPA or CARES will automatically “drive” to WPPA after WPWW if there is:

1. No TRAN code for a different screen entered, and
2. A payment is calculated/re-calculated

WPPS (W-2 Placement Summary)

WPPS replaces CARES screen AQWI and displays all placement history for a W-2 participant. It tracks when W-2 episodes and placements began and ended. It can be used in conjunction with WPPA to query how payment amounts were determined by CARES. Each page of WPPS displays seven rows of information. To access subsequent pages use PF8 when MORE... displays at the bottom of the page.

WPPS		W-2 PLACEMENT SUMMARY			01/20/07 03:45	
CASE: 0123456789		OFFICE: 5601	COUNTY: 50		XID123 A WORKER	
CASE MANAGER: XID121		CURRENT FEP ID: XID121		PRIMARY WORKER: XID231		
PIN	W-2 UPDATED	PLCMT	*-----W2-----*		*----PLACEMENT ----*	
NUMBER	SEQ DATE	CODE	BEG DATE	END DATE	BEG DATE	END DATE
_ 5100799145	1 11 24 2006	CMF	09 18 2006		11 24 2006	
_ 5100799145	1 09 18 2006	CSJ	09 18 2006		09 18 2006	11 23 2006
-----INDIVIDUALS-----						
5100799145 FIRSTNAME L						
PF13 WPPA						
NEXT TRAN: WPPS		PARMS: Case number				

Like WPPA, this is a query-only screen so any worker with access to CARES WP screens will be able to view this information. However, workers can only tran to WPPS to view information. WPPS is not included in a driver flow. If a row on WPPS is selected and the worker presses <enter> WPWW will display detailed information for the selected placement.

WPDS DISENROLLMENT

WPDS has been modified to include an edit for the Move Placements Project. When WPDS is completed and a current WPWW placement already exists, the following edit will display to end the Placement before disenrollment: "BZC – Please End Date WPWW Before Disenrolling."

W-2 ELIGIBILITY AND PAYMENT CHANGES

ED/BC (ELIGIBILITY DETERMINATION/BENEFIT CALCULATION)

Payment amounts for W-2 paid placements will be determined using placement information entered on the new placement screen WPWW in the WP subsystem. ED/BC will no longer calculate W-2 payment amounts. W-2 payment amounts will no longer display on CARES Payment Calculation Screens, EESI, EEIE, EGWT, or AGECE during runs of eligibility. The W-2 payment amount will also no longer be displayed on the Confirmed Assistance Group Summary Page. To view the W-2 estimated payment amount, tran to WPPA in the Work Programs subsystem.

Prior to running eligibility, enter non-financial and financial information, determine if there were pre-eligibility requirements and if they were met, conduct an informal assessment through ACEO if appropriate and then once eligibility is determined confirm W-2 on AGECE and process the referral on AIWP.

In most cases an informal assessment will have already taken place through ACEO however, if it is not once the W-2 AG passes, the FEP may complete the assessment process and determine what placement is appropriate for the participant and enter the assessment and placement information in the WP subsystem.

ISSUING PARTIAL PAYMENTS WHEN PLACEMENT CHANGES FROM UNPAID TO PAID

With the Move Placements Project the payment discrepancy between brand new participants in a paid W-2 placement and participants who are currently in an unpaid W-2 placement and then are subsequently placed in a paid W-2 placement will be fixed. All participants who are placed in a paid W-2 placement, either initially or following an unpaid placement, will now receive a prorated check the first month and again the second month of eligibility.

OVERVIEW OF BUDGETING FOR FOODSHARE (FS)

Once the W-2 placement information is completed on WPWW, the W-2 gross payment amount will display on the FS budget screens. The primary worker will receive an alert to run ED/BC whenever the placement begins, changes or ends. If the worker does not run eligibility, there is a batch process that runs at Adverse Action that includes the updated W-2 gross payment amount for FS benefits. As is current processing, if the W-2 worker is different from the FS worker, the W-2 worker will have to confirm W-2 eligibility after the FS worker runs eligibility. This confirmation has no effect on the W-2 payment and is not necessary to establish the new payment information that prompted the run of eligibility for FS purposes.

- **NOTE:** In a one worker model, if processing an application for both FS and W-2 and both programs are passing the eligibility determination, do not confirm the FS if you know you are going to place the individual in a W-2 paid placement. Confirm the W-2 eligibility, enter the placement on WPWW and rerun SFEX. The initial W-2 payment should then be budgeted appropriately for FS. If you are not sure which W-2 placement will be the most appropriate or if the W-2 is pending verification, pre-eligibility requirements, etc do not delay confirming the FS benefit.

RUNNING WITH DATES

In the past, running W-2 eligibility with dates to establish new W-2 payment amounts each time a paid placement began, changed or ended was confusing and error prone. With the implementation of the Move Placements Project, it is no longer necessary to run W-2 eligibility with dates. The payment will be automatically calculated or recalculated based upon the placement information entered on WPWW. Running with dates will be required when W-2 eligibility must be established for the current or prior months.

The need to run W-2 eligibility with dates will be drastically reduced with this project; however, it is not completely eliminated. The FEP will still need to run W-2 eligibility with dates in the following situations:

1. To determine or redetermine W-2 Eligibility for a prior month.

Example: An applicant applies for W-2 in January 2006. The FEP enters \$19000 in Assets for the family. The applicant is denied W-2 eligibility. The applicant files for a Fact Finding. The agency discovers that the Assets were entered in error and corrects the Assets to \$1900. The FEP will need to run W-2 eligibility with dates for January 2006 and onward to establish W-2 eligibility for the participant

2. To correctly close a case when determined ineligible.

Example: On May 15, 2006, an ongoing W-2 participant reports their only child has gone to live with his father permanently. The FEP updates the Household Members page. The FEP will need to run eligibility with a May date to issue the correct W-2 closure reason for the notice of decision.

3. To close one type of W-2 AG and reopen another type of W-2 AG.

Example: A pregnant woman requests W-2 on March 20, 2006. A WW P AG is confirmed on March 21, 2006 for March, April and May. The baby is born on March 29, 2006. The participant reports the baby to her FEP on April 6, 2006. The FEP adds the baby to the case, deletes the pregnant woman target on the W-2 Program Request page and ends the pregnancy information. The FEP would like to backdate the CMC placement effective March 29, 2006, the date of the baby's birth. If the FEP does not run eligibility with March dates, and confirm the WW C AG for March, he/she will receive an edit on WPWW telling them that the WW P AG is open and the only placement that can be made is CMP. The FEP will need to run W-2 eligibility with March dates and confirm, in order to close the WW P AG and open the WW C AG

OVERRIDES, AUXILIARIES, AND OVERPAYMENTS

Prior to the Move Placements Project, CARES screen AGOE was used to override W-2 payment amounts and eligibility. AGOE will now only be used to over-ride eligibility, FEPs will no longer be able to override W-2 payment amounts prior to the payment being issued. If the payment amount issued by CARES is incorrect, FEPs must issue an auxiliary in the event of an underpayment or set up a Benefit Recovery Claim to begin recoupment in the event of an overpayment.

If there is an established Benefit Recovery claim against an individual, CARES will not recoup any money from an initial benefit. This same procedure will apply to initial benefits sent out when an ongoing case changes from an unpaid to a paid placement.

W-2 CASE CLOSURE OVERVIEW

[Operations Memo 04-34](#) identifies policy and CARES procedures related to closing a W-2 case. The Move Placements Project does not change the policy related to reasons why and when a W-2 case may be closed. However, the CARES procedures for closing cases for non-financial or financial eligibility reasons are now inaccurate.

If a W-2 case is closing for a non-financial or financial reason, workers must make the appropriate changes in CWW, run eligibility, and confirm the W-2 AG prior to entering a W-2 End Date on WPWW. This will ensure that the appropriate closure reason is listed and the closure notice sent to the participant. Additionally, workers do not need to run W-2 eligibility with dates.

An updated Operations Memo issuing new CARES instructions for closing W-2 cases will be issued shortly.

W-2 NOTICE CHANGES AND NEW LETTER

WPL3 - END PLACEMENT LETTER (NEW)

This letter is triggered when a worker (or CARES Batch program) end dates the W-2 episode on WPWW. Once the W-2 episode is ended, the WPL3 is immediately triggered. The letter informs the participant which placement type has ended and it provides the date on which the W-2 episode/placement ended. It further states that if it was a paid W-2 placement, the payment will end as well.

AELR - W-2 PLACEMENT LETTER

The AELR letter will be generated based on updates or changes to WPWW. When a placement is entered or changed on WPWW, AELR is immediately triggered. There is one change to note with the AELR triggering functionality on WPWW. In CWW, on the W-2 Information Page, multiple placement changes made on the same day would trigger multiple AELR letters. Now, on WPWW, multiple placement changes on the same day will result in only one AELR, with the text of AELR reflecting the last placement change.

As in the past, the text on AELR will vary depending upon the type of placement made on WPWW. For the new placement type CMD, the text on AELR will inform the participant that s/he has been denied a W-2 extension, but, as a result, has been assigned to W-2 case management services.

AEC6 – W-2 CLOSURE NOTICE

When the W-2 AG is confirmed closed, AEC6 is triggered to inform the participant of the case closure. New text has been added to this notice to inform the participant that if s/he has found employment, s/he may be eligible to receive W-2 Case Management Follow-up Services for at least 12 months after the employment began.

AEO1 - WORK PROGRAM REFERRAL NOTICE

The AEO1 Work Program Referral Notice will continue to be triggered off of AIWP for both W-2 and FSET. This notice is triggered immediately after AIWP is processed (PF24 is pressed.) However, it should be noted that under the new process flow, when an individual is referred to WP as Mandatory for both W-2 and FSET, two AEO1 letters containing Mandatory participation language will be created, one for each program. Once a W-2 placement decision is made and the placement is entered on WPWW, the W-2 placement letter AELR will be sent to the participant.

AEO1 will also continue to be generated whenever changes are made to AIWP and those changes are processed.

APLW – W-2 DRUG FELON SANCTION LETTER

The text on APLW has been modified so that the language is less specific about reducing the W-2 payment based on a failed drug test. The reason this language is now less specific is that at the time the drug felon information is entered in CWW, the placement type may not have yet been entered on WPWW.

CONTACTS

Policy Questions please direct to your local Regional Office

CARES and CWW Questions please direct to the BHCE CARES Information & Problem Resolution Center