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TO: **Income Maintenance Supervisors**  
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**W-2 Agencies**  
**Workforce Development Boards**  
**Job Center Leads and Managers**  
**Training Staff**  
**Child Care Coordinators**

FROM: Amy Mendel-Clemens  
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Division of Health Care Financing

BEM/DWS OPERATIONS MEMO					
No:	07-43				
DATE:	09/27/2007				
FS	<input checked="" type="checkbox"/>	MA	<input type="checkbox"/>	SC	<input type="checkbox"/>
CTS	<input type="checkbox"/>	CC	<input type="checkbox"/>	W-2	<input type="checkbox"/>
FSET	<input 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	EP	<input type="checkbox"/>	★
<b>PRIORITY: HIGH</b>					

SUBJECT: **Electronic Benefit Transfer (EBT) Vendor Contract Change**

**CROSS REFERENCE:** Administrators Memo [07-07](#)

**EFFECTIVE DATE:** OCTOBER 22, 2007

### **PURPOSE**

This memo describes the changes that will occur as a result of the Electronic Benefit Transfer (EBT) vendor contract change from JP Morgan Chase (JPM) to eFunds.

### **BACKGROUND**

Wisconsin's EBT vendor contract with JPM will expire on October 31, 2007. DHFS released a Request for Proposal (RFP) in May 2006 for FoodShare EBT services. In September 2006, eFunds was selected as the new vendor. DHFS and eFunds, with cooperation from JPM, have been working to transition Wisconsin's FoodShare EBT services in a manner that will provide our customers and users with as little disruption in service as possible.

**CHANGE**RECIPIENT IMPACT

In general, there will be no impact on benefits being issued to recipients. However, from 10 PM Saturday, October 20 through 10 AM Sunday, October 21, 2007, EBT cardholders will not be able to shop with their EBT cards while the system is being changed over. Retailers have been provided with signs that they can post ahead of time to alert their customers to this temporary outage. EBT cardholders will be able to shop with their EBT cards again on Sunday morning October 21, 2007 after 10 AM.

The existing customer service hotline number will remain the same even though the vendor will have changed. FoodShare customers will continue to call 1-877-415-5164 for account balances, reporting lost or stolen cards, and requesting replacement cards.

The change in EBT vendor will result in a new QUEST card design. Current FoodShare recipients will not be issued new cards. However, new FoodShare recipient QUEST cards, replacement QUEST cards, and vault cards will have the new design. The EBT system will accept both current and new cards. If a recipient is issued a new card, his/her previous card will be cancelled and no longer usable after a PIN number is selected for the new card. Vault cards in each local agency will be replaced with new cards. The QUEST logo will continue to appear on the card.

WORKER IMPACT

As part of the transition to the new vendor, FoodShare EBT information and issuance functions previously located in the JPM EBT Administrative (“admin”) terminal and CARES mainframe systems will be available on four simplified, web-based EBT pages in CARES Worker Web (CWW). Workers will be able to find card and benefit information, issue vault cards and enter FoodShare repayments using the four new CWW pages.

Because of the conversion from JPM to eFunds, CARES will be unavailable from 5 PM Friday, October 19 until Monday morning, October 22, 2007.

The current EBT admin terminal will not be available as of October 22, 2007. Beginning Monday, October 22, 2007, workers will use CWW to access real time EBT information using the EBT pages in CWW. All eligibility workers will have query access to the new EBT pages in CWW.

Workers who currently issue replacement and vault cards will have access to conduct those functions in CWW. This means:

- Workers who already have access to CWW and who have been performing EBT-related functions will now use CWW to perform those functions, and will have access to the EBT pages automatically beginning October 22, 2007.
- Workers who have access to CWW but who have not been using the current EBT admin. terminal or CARES Mainframe screen BIPN will have query access to view EBT information using the four new CWW pages. They will be given this access automatically beginning October 22, 2007.
- Staff with EBT responsibilities who previously used only the JPM EBT admin terminal and/or the CARES mainframe and who do not have CWW access will need to complete and submit DWD's standard security forms (DWSW – 10E and DWSW – 11E) by **Friday, October 5, 2007**. This will allow them to utilize the four new EBT web pages for viewing and processing EBT-related functions. Because the EBT admin terminal will no longer be accessible as of Monday, October 22, 2007, new users are strongly encouraged to verify they have access to CWW prior to October 22, 2007.

**NOTE** ➤ Prior to October 22, 2007, new users can login, however EBT pages will not be available.

Local Income Maintenance agencies are not expected to answer additional calls or perform additional functions during or after this transition. As previously stated, FoodShare customers can continue to call 1-877-415-5164 for account balances, reporting lost or stolen cards, and requesting replacement cards.

The normal daily EBT data process schedule will continue to be the same, running at 11:00 PM. Emergency batch processes will still be run three times daily: 12:30 PM, 3:30 PM, and 6:30 PM and twice on Saturdays (when CARES is up) 12:30 PM and 3:30 PM.

PIN Select Devices (currently referred to as CAPS devices) will be replaced by eFunds. Each individual agency will be contacted by eFunds to implement the equipment change. If your EBT Coordinator has recently changed, please contact Annette Duffey at [duffeam@dhfs.state.wi.us](mailto:duffeam@dhfs.state.wi.us).

## SYSTEM CHANGES

### NAVIGATION CHANGES

#### Navigation Menu



Most EBT pages will be accessed from the navigation menu like other CWW pages. Other CWW navigation features will also be used (e.g. the magnifying glass). Specific navigation for each page is described here and in Process Help EBT Chapter 80.

#### Search Criteria Page

The Search Criteria page has been updated so that you are now able to search by EBT Card Number. By entering an EBT Card Number on this page and clicking Go, workers are able to access the EBT Card Detail page.

A screenshot of the "Search Criteria" page in a web application. The page is divided into two main sections: "Demographic Information" and "Identification Numbers". The "Demographic Information" section includes fields for "First Name", "Last Name", "Gender", and "Birth Date" (formatted as MM/DD/YYYY). There are radio buttons for "Starts With", "Exact", and "Sounds Like" for both first and last names, and checkboxes for "Also search against alias names" and "Including ACCESS applications". A "Reset" button is located in the top right corner. The "Identification Numbers" section includes fields for "PIN", "MAID", "SSN", and "EBT Card Number", each with a "Go" button next to it. The "EBT Card Number" field and its associated "Go" button are circled in red.

NEW CWW PAGES

**EBT Summary Page**

This page displays all the QUEST cards that have been issued for a case. It also shows the account status and balance remaining in the account and is where workers record voluntary return of benefits. Click on the magnifying glass to access the EBT Card Detail Page for each card.

There are two sections on the EBT Summary Page: 1) EBT Summary and, 2) Adjust Benefits Amount.

The EBT Summary Section is divided into Case Summary and Issued Cards.

The screenshot shows the EBT Summary page with the following sections:

- EBT Summary** (Page Title)
- Case Summary** (Section Header)
  - Account Status: **ACTIVE**
  - Balance: **\$299.00**
  - Last Updated Date: **09/06/2007**
- Issued Cards** (Section Header)

Individual	Client Type	Card Number	Card Status
SARAH MELISKJWRXXLVA	PRIMARY		
FRED JOHNSON	ALTERNATE PAYEE	5077-0800-0000-8945	Active
FRED JOHNSON	ALTERNATE PAYEE	5077-0890-0000-2162	Inactive - Card has been deactivated or canceled
- Adjust Benefits Amount** (Section Header)
  - Voluntary Return of Benefits Amount: \$  .
  - Submit button
- Add Case Comment** (Button)

Annotations in the image:

- A red box labeled "Case Summary - Display" points to the Case Summary section.
- A red box labeled "Benefit Adjustment" points to the Adjust Benefits Amount section.

## EBT Card Detail Page

This page was previously known as the “Balance Inquiry” screen in the EBT admin. terminal. It displays all the details of an EBT card. All data on this page is in real time. Workers with appropriate access will be able to replace a card with a new vault card on this page.

This page can be accessed in two ways: 1) by entering the EBT card number on the Search Criteria page (accessed through the navigation menu) or 2) by clicking the magnifying glass for a card on the EBT Summary page.

The screenshot displays the 'EBT Card Detail' interface. At the top, there is a 'Reset' button. Below the title, there are two main sections: 'Card Information - Display' and 'Issue Replacement'. The 'Card Information - Display' section is further divided into 'Card Detail' and 'PIN Detail'. The 'Card Detail' section shows the following information:

Card Number:	5077-0800-0000-8945	Card Type:	PERMANENT
Card Name:	FRED JOHNSON	Address:	9456 S WEBSTER ST MADISON, WI 54702-0000
Card Status:	Active	Last Transaction:	09/07/2007 11:39 AM
Card Issued:	09/06/2007 9:15 PM	Card Issued Reason:	NEW ISSUE
Last Updated:	09/07/2007 11:40 AM		

The 'PIN Detail' section shows:

PIN Selected:	YES	PIN Last Changed:	09/07/2007 11:40 AM
PIN Select Method:	ARU		

The 'Issue Replacement' section contains a 'New Vault Card Number' input field and a 'Submit' button. A 'Return' button is located at the bottom right of the page.

There are two sections on this page: 1) Card Information and 2) Issue Replacement. The Card Information display section is divided into Card Detail and PIN Detail. The Issue Replacement section allows authorized workers to enter a card number to issue a new vault card for expedited benefits or to do an emergency card replacement to replace a permanent card that has been lost, damaged or stolen.

### EBT Transaction Detail Page

The EBT Transaction Detail page is used for querying transaction information. Information available on this page includes: 1) date/time of transaction, 2) card number and name of card holder, 3) description of successful and failed transactions, 4) merchant name and address, 5) amount of transaction (credit or debit), and 6) account balance amount.

This page is accessed from the Navigation Menu by clicking on the EBT Transaction Detail link in the Benefit Issuance Section.

This page will display transactions for a case in descending time order. The most recent 20 transactions will be displayed. To search for transactions by a specific date use the Record Navigator at the bottom of the page. Records are available for up to six months prior to the current date. Columns can be sorted by clicking on the link above the column; however, the balance column does not sort. If you sort using any column, except the date/time, you will not see the card balance.

Columns can be sorted.

1	2	3	4	5	6	
Date / Time	Card	Description	Merchant	Debit	Credit	Balance
08/13/2007 8:34 AM	5077-0800-0000-8408 AMANDA JONES	PURCHASE	WHOLE FOODS MADISON, WI	\$16.73		\$276.12
08/08/2007 1:32 PM	5077-0800-0000-8408 AMANDA JONES	PURCHASE	WILLY ST COOP MADISON, WI	\$85.28		\$292.85
08/07/2007 8:41 PM	5077-0800-0000-8408 AMANDA JONES	PURCHASE	TRIANGLE MARKET MADISON, WI	\$39.13		\$13.10
08/07/2007 12:01 AM	5077-0800-0000-8408 AMANDA JONES	DEPOSIT			\$339.00	\$0.00
07/26/2007 5:22 PM	5077-0800-0000-8408 AMANDA JONES	PURCHASE	WAL-MART MADISON, WI	\$33.97		\$52.23
07/25/2007 2:48 PM	5077-0800-0000-8408 AMANDA JONES	PURCHASE	ECKERD DRUG FITCHBURG, WI	\$15.19		\$86.20
07/23/2007 12:01 PM	5077-0800-0000-8408 AMANDA JONES	PURCHASE	STOP & SHOP MADISON, WI	\$19.06		\$101.39
07/22/2007 1:01 PM	5077-0800-0000-8408 AMANDA JONES	PURCHASE	WALGREENS MADISON, WI	\$14.10		\$120.45
07/21/2007 12:56 PM	5077-0800-0000-8408 AMANDA JONES	PURCHASE INSUFFICIENT FUNDS	WALGREENS MADISON, WI	\$141.00		\$134.55
07/21/2007 10:56 AM	5077-0800-0000-8408 AMANDA JONES	PURCHASE	TRADER JOE'S MADISON, WI	\$50.64		\$134.55
07/19/2007 3:33 PM	5077-0800-0000-8408 AMANDA JONES	PURCHASE	OPEN PANTRY MADISON, WI	\$16.10		\$185.19
07/19/2007 1:32 PM	5077-0800-0000-8408 AMANDA JONES	FOODSHARE	MADISON, WI			\$201.29
07/09/2007 10:56 AM	5077-0800-0000-8408 AMANDA JONES	PIN CHANGE				\$0.00
07/07/2007 12:01 AM	5077-0800-0000-8408 AMANDA JONES	DEPOSIT			\$339.00	\$0.00

Use Record Navigator to search by date.

From Date: 07/28/2007 To Date: 07/28/2007 Go

**NOTE** ➤ Occasionally, you will see the Balance displayed as \$0.00. This occurs when a Deposit has been made to the account and when the customer has selected or changed his/her PIN. The true balance of the account will be reflected after the customer has made a debit transaction using his/her QUEST card. Deposits will not be displayed until they become available; the Date/Time of the Deposit transaction reflects the date the benefit was sent from CARES to eFunds, not the date the benefit is actually available to the recipient. The EBT Summary Page will show the correct balance.

### EBT Expedited Card Issuance Page

This page was previously known as the CARES Mainframe screen BIPN. It is used to issue a vault card for expedited FoodShare benefits. As with BIPN, workers will need to complete this page before a customer can PIN the vault card. Upon submission of this page, demographic information is sent to eFunds real time in order to setup an account for the new vault card. Recipients are able to PIN their card immediately after their account is set up in the eFunds system. However, the account balance may not be immediately available for use. The benefit amount is available after the emergency batch cycles are run (12:30 PM, 3:30 PM, 6:30 PM).

This page is accessed from the Navigation Menu by clicking on the EBT Expedited Issuance link in the Benefit Issuance section.

The screenshot shows a web form titled "EBT Expedited Card Issuance". At the top right, there are "Cancel" and "Reset" buttons. The form has a section titled "Card Issue" with a light blue header. Below this, there are two rows of data. The first row is for the "Primary Person", showing the name "MARGE SIMPSON 36F PP" and an empty "Card Number" input field. The second row is for the "Alternate Payee", showing the name "BONNIE SMITH 24F" and another empty "Card Number" input field. At the bottom of the form, there is an "Add Case Comment" button on the left, and "Cancel" and "Submit" buttons on the right.

The EBT Expedited Card Issuance Page displays demographic information of the Primary Person, and displays an Alternate Payee or Authorized Buyer, if there is one. Authorized workers can enter the vault card number for a Primary Person or Alternate Payee if this is their first QUEST card. Replacement vault cards are issued on the EBT Card Detail Page.

**REMEMBER** ➤ FS benefits must be confirmed as expedited issuance in order for an emergency expedited card to be issued via this page.

## TRAINING

### INSTRUCTIONAL RESOURCES

The new CWW EBT pages are designed to be intuitive and easy to use. Workers who are familiar with CWW and with the EBT functions should be able to get the instructional information they need by reviewing Process Help Chapter 80. For that reason, no formal or mandatory training will be provided.

CWW Process Help Chapter 80 will be updated with information about how to use the new CWW pages. Process information currently located in the EBT Guide will be incorporated into Process Help Chapter 80 and will contain images of each new EBT page along with “How To” instructions for query and update transactions. Also note that policy from the EBT Process Guide will move to Section 7.0 in the FoodShare Handbook. These resources will be available prior to implementation.

If those using the new EBT pages are not experienced with basics in CWW (e.g., navigation), local agencies will be responsible for training them. DHFS is providing a resource to assist in this training if desired. There will be a presentation called “CARES Worker Web Instructions for Query Users” which will be available on the DHFS Eligibility Management (EM) web page in fall 2007.

## **CONTACTS**

BEM CARES Information & Problem Resolution Center

★Program Categories – FS – FoodShare, MA – Medicaid, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – Food Stamp Employment and Training, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WIA – Workforce Investment Act, Other EP – Other Employment Programs.

DHFS/DHCF/BEM/MW/JE