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State of Wisconsin
Governor Jim Doyle

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

FROM: Amy Mendel-Clemens, Section Chief
Technical Assistance, Training & Education
Bureau of Enrollment Management
Division of Health Care Access and Accountability

BEM/DFS OPERATIONS MEMO					
No:		10-08 (Amended)			
DATE:		1/19/2010			
FS	<input checked="" type="checkbox"/>	MA	<input checked="" type="checkbox"/>	BC+	<input checked="" type="checkbox"/>
SC	<input type="checkbox"/>	CTS	<input checked="" type="checkbox"/>	FSET	<input type="checkbox"/>
				BC+ CORE	<input checked="" type="checkbox"/>
CC	<input type="checkbox"/>	W-2	<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	<input type="checkbox"/> *
EP					

SUBJECT: **CARES Enhancement - Case Management Search Criteria Page**

CROSS REFERENCE: Process Help, Section 6.3

EFFECTIVE DATE: JANUARY 25, 2010

PURPOSE:

The purpose of this memo is to communicate a CARES enhancement scheduled for implementation on January 25, 2010, that will allow local agencies the options to view action items and use a Caseload Management Search function in CWW.

BACKGROUND:

Effective January 25, 2010, local agencies will have additional options available to use in caseload maintenance. These options include a Caseload Management Search Criteria page in CWW along with an Action Item feature in the information bar at the top of the page. These options have been piloted at the Enrollment Services Center (ESC) and are now being made available to local agencies.

POLICY CHANGE:

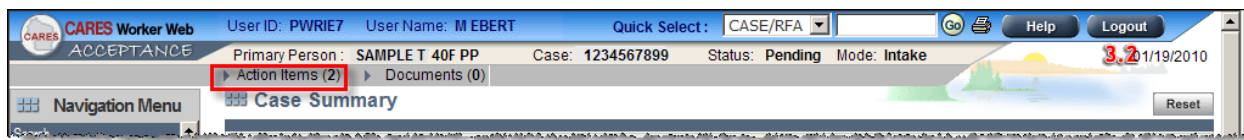
There are no policy changes being implemented with these system changes.

CARES/CWW CHANGES:

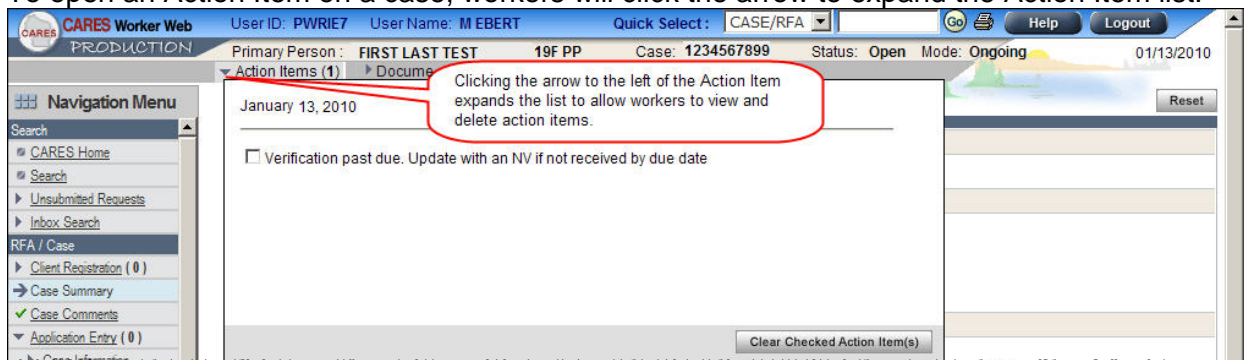
Two new features in CWW, “Action Items” and the “Caseload Management Search Criteria” page, are being made available to local agencies. These functions have been available to the ESC since June. The use of these features is optional at this time and may be used at the local agencies’ discretion.

ACTION ITEMS

A new section, “Action Items”, will display on the information bar in CWW. The Action Item field is case specific and will show the count of Action Items for the case. Action Items parallel CARES Mainframe alerts and will allow a worker to view alerts on a case without navigating to CARES Mainframe. The Action Items for a case may be viewed in the information bar while on any CWW page for that case.



To open an Action Item on a case, workers will click the arrow to expand the Action Item list:

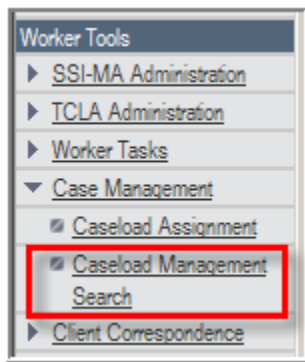


Once a worker has completed an Action Item, s/he may delete it by clicking the check box in front of the item and then clicking the “Clear Checked Action Item(s)” button. S/he may then collapse the Action Items list by clicking the arrow to the left of Action Item section on the information bar. Some action items will delete automatically once the action has been taken.

Additional information on how to use these options will be published soon to Process Help, Section 6.3.

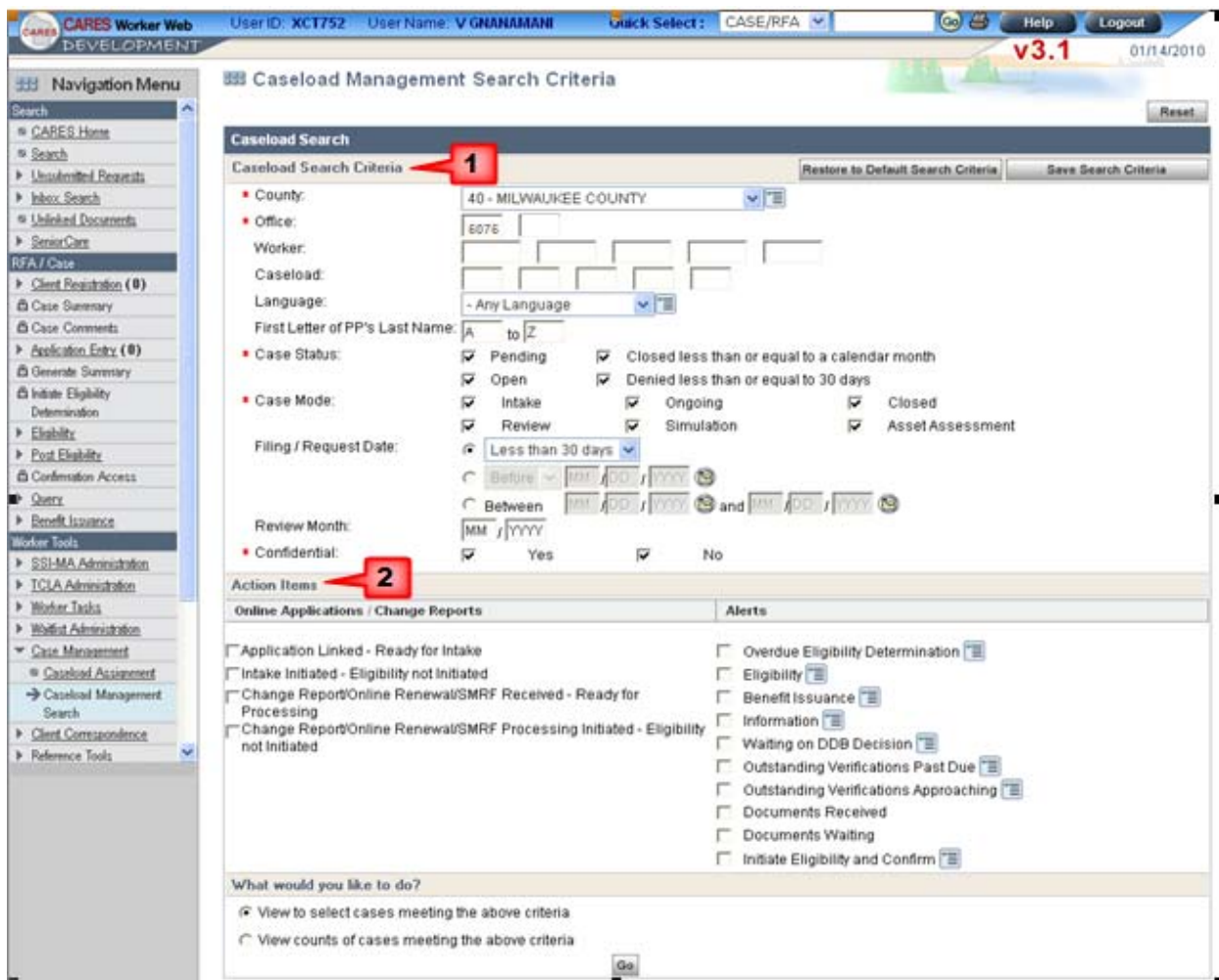
CASELOAD MANAGEMENT SEARCH CRITERIA


The Caseload Management Search Criteria page can be accessed from the Worker Tools section of the Navigation Menu as shown here:



The Caseload Management Search Criteria page contains two main parts:

- 1) The Caseload Search Criteria section allows workers to search for cases based on particular criteria in order to view a list of cases or count of cases that meet the selected criteria.
- 2) The Action Items section allows workers to search cases based on tasks or actions that need to be taken on the cases. It is split into two subsections: Online Applications/Change Reports and Alerts.



- The Online Applications/Change Reports subsection contains criteria that can be used to search for cases that have outstanding ACCESS applications or change reports that need to be processed. Workers will be able to review results as a list of cases or as a count of cases meeting the selected criteria.
- The Alerts subsection contains categories of alerts. Workers will be able to see a list of alerts belonging to each category by clicking on the Reference Table Pop Up icon.  Workers will be able to review results as a list of cases that have alerts in the selected category or as a count of cases meeting the selected criteria.
 - Note: The Documents Received and Documents Waiting categories will only produce results for Scan First agencies and will not have the Reference Table Pop Up option available.

Examples of how local agencies may find these new features useful are listed below:

Example 1: A local agency with a Change Center may find it useful to pull a list of cases (with a file date within the past 90 days) located in that county under the specific office number that meets the criteria for “Change Report Received – Ready for Processing”. This will enable management to obtain a count to use in workload distribution along with the list of Change Reports ready for processing for cases with a file date within the past 90 days.

Example 2: A local agency worker may find it useful to pull a list of cases located in his/her county, specific office number, under his/her user ID and caseload number(s) that have “Outstanding Verification Past Due” and a file date within the past 90 days. S/he would then be able to check to see if the verification has or has not been received and update the case(s) as needed. This feature is similar to using the customized alert request feature in CARES Mainframe, but workers must keep in mind that results will be limited to cases with a file date within the past 90 days.

See Process Help Chapter 6.3 for more detailed information on how to use this page to search for specific cases within a caseload.

CONTACTS:

BEM CARES Information & Problem Resolution Center

*Program Categories – FS – FoodShare, MA – Medicaid, BC+ – BadgerCare Plus, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – FoodShare 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.

DHS/DHCAA/BEM/ME