

DEPARTMENT OF
CHILDREN AND FAMILIES
Secretary Reggie Bicha
201 East Washington Avenue, Room G200
P.O. Box 8916
Madison, WI 53708-8916
Telephone: 608-266-8684
Fax: 608-261-6972
www.dcf.wisconsin.gov



State of Wisconsin
Governor Jim Doyle

DEPARTMENT OF HEALTH SERVICES
Secretary Karen Timberlake
1 West Wilson Street
P.O. Box 7850
Madison, WI 53707-7850
Telephone: (608) 266-9622
FAX: (608) 266-7882
www.dhs.wisconsin.gov

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: Janice Peters, Director
Bureau of Working Families
Division of Family and Economic Security

DFES OPERATIONS MEMO					
No: 10-62 (Amended 11/19/10)					
DATE: SEPTEMBER 13, 2010					
FS	<input type="checkbox"/>	MA	<input type="checkbox"/>	BC+	<input type="checkbox"/>
SC	<input type="checkbox"/>	CTS	<input type="checkbox"/>	CC	<input type="checkbox"/>
W-2	<input checked="" 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	<input type="checkbox"/>
				EP	*
PRIORITY: High					

SUBJECT: Updates to W-2 Screening and Assessment Policy and Procedure

CROSS REFERENCE: [DFES ADMINISTRATOR'S MEMO 10-05, Voluntary Compliance Agreement between the Department of Children and Families and the US Department of Health and Human Services, Office for Civil Rights](#)
[Operations Memo 10-50, CARES Screen WPBD Updates](#)
Operations Memo 10-63
Operations Memo 10-64

EFFECTIVE DATE: October 1, 2010

PURPOSE

This memo describes several policy changes related to the Department's compliance with the Voluntary Compliance Agreement (VCA) between the Department of Children and Families and the U.S. Department of Health and Human Services, Office for Civil Rights (OCR):

1. A new release of W-2 Manual, Chapter 5, *Screening and Assessment*;
2. An overview of the screening and assessment policies in Chapter 5 that have changed;
3. An updated version of the *Wisconsin Works W-2 Barrier Screening Tool Agreement* (forms [13578](#), [13578-S](#), [13578-H](#));
4. The release of a new form, titled *Wisconsin Works (W-2) Formal Assessment Agreement* (forms [2565](#), [2565-S](#), [2565-H](#));

5. The release of a new form, titled *Services and Accommodations To Help You Do Your W-2 Activities* (forms [2564](#), [2564-S](#), [2564-H](#));

BACKGROUND

As described in [DFES ADMINISTRATOR'S MEMO 10-05](#), the Department is moving forward with a number of changes to the W-2 program that are required as part of the Voluntary Compliance Agreement. The policy and procedural changes covered in this memo will fulfil a number of requirements laid out in the VCA that are intended to ensure that participants with disabilities and other barriers to employment receive the needed services and accommodations to reach their employment goals.

POLICY CHANGE

Below is a summary of the policy changes that will be made to the W-2 Policy Manual, Chapter 5 Screening and Assessment. The information below is laid out by Manual Sections. Attached is a copy of Chapter 5 which tracks the changes made to the Chapter using strikeouts and underlines. These updates will be made to the W-2 Policy Manual by October 1, 2010.

Sections 5.1.2 and 5.4.2: Adjusts the requirement for when to use the BST. Effective October 1, 2010, the BST must be offered to W-2 applicants prior to the W-2 placement.

Section 5.4.3: Revisions have been made to the *Wisconsin Works W-2 Barrier Screening Tool Agreement* (forms [13578](#), [13578-S](#), [13578-H](#)) which is referenced in this section.

Section 5.5.2: Clarifies the requirements for when to offer a formal assessment.

Section 5.5.3: Adds requirements for case managers to:

- use the new *Wisconsin Works (W-2) Formal Assessment Agreement* (forms [2565](#), [2565-S](#), [2565-H](#)) to help explain the purpose of a formal assessment.
- make necessary adjustments to the participant's placement and revise the W-2 Employability Plan (EP) within 30 days after receiving the results of a formal assessment.
- document needed services, activities, and reasonable modifications and accommodations in the participants EP based on recommendations from the formal assessment. A new form, *Services and Accommodations To Help You Do Your W-2 Activities* (forms [2564](#), [2564-S](#), [2564-H](#)) was created for this purpose.

Note: The attached version of the form is an example for workers to review. The language shaded in grey is an example of the type of language that workers should include when documenting information about services and accommodations for a participant.

- advise the W-2 education, training or work site providers of any needed reasonable modifications or accommodations to the W-2 education, training or worksite.

Section 5.5.5: Includes some revisions to the "necessary elements" of a formal assessment.

Section 5.5.9: There are no policy changes in this section. Language was adjusted to reflect the new policy requirement in Section 5.4.2 that the BST be offered prior to W-2 placement.

Section 5.5.10: Some language changes were made to further clarify the existing policy.

ACTION REQUIRED

W-2 Agency directors, supervisors, and lead workers must review these sections of Chapter 5 as well as the three forms referenced above with all W-2 agency staff and contracted staff who work with W-2 participants to ensure they have a thorough understanding of the current screening and assessment policy.

Training on Ops Memo 10-62 is required of all W-2 agency staff and subcontractors. Training will be delivered via Coach's Corner and will be available in the Learning Center on September 14, 2010. This training must be completed by Thursday, September 30, 2010. To access the Learning Center go to <https://wss.ccdet.uwosh.edu/stc/DCF/>

Classroom training on W-2 Policy Manual, Chapter 5 Screening and Assessment, will be scheduled throughout the state beginning in November 2010. Access to registration for the course will be announced via DXBM, the Training Times and communication to Agency Training Liaisons.

Contact Beki Lockery (blockery@kaisergroup.com) with questions about these two trainings.

ATTACHMENTS

Wisconsin Works Manual, Chapter 5, Screening and Assessment

Example of information to document on new form, *Services and Accommodations To Help You Do Your W-2 Activities*

CONTACTS

For Policy Related Questions: Operations Staff

For CARES Processing Questions: W-2/CC Help Desk

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.

DCF/DFES/BWF/HH