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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: Shawn Smith, Bureau Director
Bureau of Enrollment Policy & Systems
Division of Health Care Access and Accountability

BEPS/DFS OPERATIONS MEMO

No: 12-31

DATE: 6/06/2012

FS	☒	**MA**	☒	**BC+**	☒
SC	☐	**CTS**	☒	**FSET**	☐
BC+ Basic	☐			**BC+ CORE**	☒
CC	☐	**W-2**	☐	**EA**	☐
CF	☐	**JAL**	☐	**JC**	☐
RAP	☐	**WIA**	☐	**Other EP**	☐*

SUBJECT: Changes to Case Transfer and Administrative Move Process

CROSS REFERENCE: Ops Memo 11-69

EFFECTIVE DATE: June 11, 2012

PURPOSE: The purpose of this memo is to announce Case Transfer and Administrative Move enhancements to the Agency Transfer page in CARES Worker Web (CWW) to accommodate the new Income Maintenance Administrative Structure.

BACKGROUND:

Currently, the Case Transfer and Administrative Move functions on the Agency Transfer page are restricted to transferring or administratively moving cases by a worker in the current agency or a worker in the agency where the case is moving. A worker in an agency within the same consortia was unable to transfer or administratively move the case without transferring the case first into their own agency and then transferring or administratively moving the case to the new agency.

CWW UPDATES:

Enhancements will be made to the Case Transfer and Administrative Move process to allow workers in either the old or new agency within the same consortia to complete the transfer or administrative move without first transferring the case to their agency.

Workers will be able to transfer or administratively move cases as long as the worker has access to the current or new office. The County/Tribe field dropdown will be customized to list only the offices that the case can be transferred or administratively moved to, based on the worker's office access.

If the case meets the W2/CC conditions outlined in Ops Memo 11-69, an informational message will display upon load of the Agency Transfer page that the case cannot be administratively moved. The administrative move radio button will display as read only and cannot be selected.

Transfer Options

- Transfer Case due to a change in County of Residence

  This option will be enhanced to allow agencies to transfer a case from one office to another, if the current or new office is in the same consortia of the worker.

  If the worker has access to the new office, the worker can select either the Direct Worker Transfer option or the Transfer Coordinator option.

  When selecting the Direct Worker Transfer option, the receiving Worker ID and Worker's Caseload must be entered.

  If the worker does not have access to the new office, the worker must select to transfer the case to the Transfer Coordinator.

  When transferring a case outside of the consortium, the worker must have office access to the current office. When transferring outside of the consortium the 'Direct Worker Transfer Option' will be disabled and the worker must select the 'Transfer coordinator' option.

- Case transfer within the County/Tribe

  This is a new option that will be added to the Agency Transfer page. This option allows a worker to transfer a case to a different office within the same agency. The worker must have office access to the current or new office.

  If the worker has access to the new office, the worker can select either the Direct Worker Transfer option or the Transfer Coordinator option.

  When selecting the Direct Worker Transfer option, the receiving Worker ID and Worker's Caseload must be entered.

  If the signed in worker does not have access to the new office, the worker can select to transfer the case to the Transfer Coordinator.

- Administrative move within Consortium

  This option will be enhanced to allow agencies to administratively move a case from one office to another if the current or new office is in the same consortia of the worker.

  If the worker has access to the new office, the worker can select either the Direct Worker Transfer option or the Transfer Coordinator option.

  When selecting the Direct Worker Transfer option, the receiving Worker ID and Worker's Caseload must be entered.

  If the signed in worker does not have access to the new office, the worker can select to transfer the case to the Transfer Coordinator.

CONTACTS:

BEPS 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, BC+ Core – BadgerCare Plus Core, 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.

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