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**State of Wisconsin
Governor Scott Walker**

**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, Director
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BEPS/DFS OPERATIONS MEMO					
DCF/DFES OPERATIONS MEMO					
No: 12-42					
DATE: 08/10/2012					
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+ Basic	<input type="checkbox"/>	BC+ CORE	<input checked="" type="checkbox"/>		
CC	<input checked="" type="checkbox"/>	W-2	<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	

SUBJECT: Team Management Tool

CROSS REFERENCE: Process Help Chapter 73 (not yet published)

EFFECTIVE DATE: AUGUST 27, 2012

PURPOSE:

This memo is to announce a newly designed Team Management Tool in Cares Worker Web (CWV). This tool will allow supervisors and some workers to create teams of workers as well as monitor and manage the team's workload using the new Integrated Client Scheduling system and the new Workload Management tools.

BACKGROUND:

The administration of the Income Maintenance (IM) programs was moved from local county agency administration to the IM consortia model, effective January 1, 2012. Under the new model, many IM agencies have "banked" cases to allow multiple workers to manage a

caseload. This change has created a need to monitor and manage workload across the consortium based on the “team” approach.

Teams can only be created by the county or within an IM Consortia. This tool is available to W-2 agencies and can be used as described. DCF will issue further guidance to W-2 agencies on this tool related to the 2013 W-2 and Related Programs Contract. It is a future phase to allow teams to be established by W-2 geographical area.

POLICY:

There are no policy changes associated with this implementation.

Cases that are eligible for Wisconsin Shares or Wisconsin Works (W-2) must continue to be assigned to a worker in the county of residence. Although DCF has allowed flexibility in managing Wisconsin Shares cases in the IM consortia model, agencies are still expected to adhere to the policies set forth in [DCF/DECE Administrator's Memo 11-03](#).

CARES:

To accommodate the need to manage and monitor workload across agencies or counties within an IM Consortium, a new Team Management tool has been added to CWW. Workers will access this tool via the Navigation Menu in CWW under Worker Tools.

The following pages will be added to Cares Worker Web (CWW):

TEAM MANAGEMENT PAGE

The screenshot displays the 'Team Management' interface. On the left is a 'Navigation Menu' with various options, including 'Team Management' which is highlighted with a red box. The main area is titled 'Team Management' and contains a 'Team Search Criteria' section. This section has two dropdown menus: 'County' (selected as '40 - MILWAUKEE COUNTY') and 'IM Consortium'. A 'Go' button is positioned to the right of the 'IM Consortium' dropdown. A 'Create Team' button is located in the top right corner of the search criteria area, also highlighted with a red box. A 'Reset' button is visible in the top right corner of the page.

Supervisors and workers with a CARES security level of 50 or higher have the ability to create a team at the county or consortium level by clicking on the “Create Team” button. To view or edit existing teams, click on the “County” or “Consortium” and then click on the “Go” button (see below). The default selection is the county associated with the Worker ID of the worker who is logged into the system.

Team Management

The screenshot shows the 'Team Management' interface. At the top right, there is a 'Reset' button. Below it is a 'Team Search Criteria' section with a 'Create Team' button. The search criteria include a radio button for 'County' (selected) with a dropdown menu showing '40 - MILWAUKEE COUNTY', and a radio button for 'IM Consortium' with a dropdown menu and a 'Go' button. Below the search criteria is a 'Team Search Results' table with columns: Team ID, Team Name, Team Lead, Location, Team Type, and an action column. The table contains three rows of data. The first row (Team ID 52) has its action icons (edit and delete) highlighted with a red box.

Team ID	Team Name	Team Lead	Location	Team Type	
52	TEAMA	XCTH39 - ILYAS, S	40 - MILWAUKEE COUNTY	Change Center, Core	
54	TEAMCC	JX2149 - BLANK, S	40 - MILWAUKEE COUNTY	CC, EBD, IM	
55	TEAMCX	XCTH38 - ILYAS, S	40 - MILWAUKEE COUNTY	CC, Change Center, Core, IM	

To edit an existing team select the edit icon. A team can be deleted or a new team created as well.

TEAM DETAILS PAGE

Team Details

The screenshot shows the 'Team Details' page for team ID 52. At the top right, there are 'Cancel' and 'Reset' buttons. The page is titled 'Team Attributes' and contains the following fields:

- Team ID: 52
- * Team Name: (indicated by a red arrow)
- Purpose: (Current Size = 3 characters (200 characters max.))
- * Type: IM, Change Center, LTC, Child Care, Core, Non-English, W-2, EBD, Other (indicated by a red arrow)
- * Location: County: 40 - MILWAUKEE COUNTY, IM Consortium (indicated by a red arrow)
- Last Updated: 04/27/2012
- Last Updated By: XCTH38

Supervisors and workers with a security level of 50 or higher will use this page to create a team or edit an existing team. The Team Name, Type and Location are required fields. The team name is limited to 40 characters. The team name must be unique and cannot be used more than once within the same county or consortium. The purpose box is information only and may be used to describe the team and is not a required field.

Team Members

Worker ID: 

Role: 

Delete:

BACKUP LEAD
TEAM LEAD
 WORKER

Worker Id	Last Name	First Name	County	Role	Last Updated	Last Updated By	Deleted	
XCTH39	SEMSETTINN	ILYAS	MILWAUKEE	TEAM LEAD	07/13/2012	XCTH38	<input type="checkbox"/>	 

Team members are added by worker ID. A “Role” (worker, team lead or backup lead) is also assigned to each member. Although multiple backups and workers can be assigned, there can only be one lead worker. The team members must belong to the same consortium. The team details page will be used to make changes to teams already created such as team attributes or to add/remove workers.

If the Worker ID is not available, the “Worker Lookup” option may be used by clicking on the magnifying glass.

Office Worker Find

Worker Lookup

Search By: Worker Team

Criteria

First Name: Office:

Last Name: County:

Worker ID: IM Consortium:

Once teams are created, a worker may view a Team Dashboard (see [Ops Memo 12-41](#), Workload Dashboard) to monitor and balance the workload at a county or consortium. In addition, this tool can be used with the Integrated Client Scheduling (see [Ops Memo 12-40](#), Client Scheduling) to schedule appointments. This will offer greater flexibility and increased ability to accommodate a member’s schedule by searching multiple workers’ calendars at one time.

Detailed information on using the Team Management Tool in CWW will be available prior to implementation in Process Help Chapter 73.

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.

DHS/DHCAA/BEPS/AA