



Date: August 26, 2016

DHCAA Operations Memo 16-J6

To: Income Maintenance Supervisors
 Income Maintenance Lead Workers
 Income Maintenance Staff
 W-2 Agencies
 Workforce Development Boards
 Child Care Coordinators

From: Rebecca McAtee, Bureau Director
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Affected Programs:	
<input checked="" type="checkbox"/>	BadgerCare Plus
<input checked="" type="checkbox"/>	Caretaker Supplement
<input checked="" type="checkbox"/>	Child Care
<input type="checkbox"/>	Children First
<input type="checkbox"/>	Emergency Assistance
<input checked="" type="checkbox"/>	FoodShare
<input type="checkbox"/>	FoodShare Employment and Training
<input type="checkbox"/>	Job Access Loan
<input type="checkbox"/>	Job Center Programs
<input checked="" type="checkbox"/>	Medicaid
<input type="checkbox"/>	Other Employment Programs
<input type="checkbox"/>	Refugee Assistance Program
<input type="checkbox"/>	SeniorCare
<input checked="" type="checkbox"/>	Wisconsin Works
<input type="checkbox"/>	Workforce Innovation and Opportunity Act

Enhanced Renewal and Review Functionality in CARES Worker Web; New Automated Process for Sending Pre-Printed Renewal Forms

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CROSS REFERENCE

Process Help, [Chapter 53 Workload Dashboard](#)

EFFECTIVE DATE

September 24, 2016

PURPOSE

This Operations Memo announces enhancements being made to CARES Worker Web (CWW) to add renewals and reviews to the Workload Dashboard for the BadgerCare Plus, Caretaker Supplement, FoodShare, Medicaid, Wisconsin Works (W-2), and Wisconsin Shares Child Care programs. In addition, this Memo announces a new automated process for sending Pre-Printed Renewal Forms (PPRFs) for health care and Caretaker Supplement renewals, as well as enhancements to the logic used in CWW to generate the PPRF and case summary.

BACKGROUND

The Workload Dashboard is a CWW tool that manages and tracks applications, Six-Month Report Forms (SMRFs), and potential errors and discrepancies. Starting September 24, 2016, renewals and reviews for all programs will display on the Workload Dashboard. Adding renewals and reviews to the Workload Dashboard will allow workers to more effectively track and accurately report on timeliness, performance, and workload related to renewals and reviews.

Note: W-2 refers to its six-month eligibility redeterminations as reviews. All other program areas refer to their annual recertification processes as renewals. For readability, both the review and renewal processes will be referred to as “renewals” in this Operations Memo.

Also beginning on September 24, 2016, PPRFs will be automatically generated and sent as an attachment to the 45-day renewal letter for cases that have a health care and/or Caretaker Supplement renewal due. This new process is being implemented to comply with provisions in the Patient Protection and Affordable Care Act of 2010 that require states to provide individuals with a renewal form containing information available to the agency that is needed to renew eligibility. In addition, the PPRF and case summary documents will be enhanced to include more relevant eligibility information.

POLICY

There are no policy changes associated with this Memo.

CARES

The following CWW enhancements will be implemented on September 24, 2016. References to “renewal” or “review” in CWW pages, sections, and drop-down menus will now be titled “renewal/review.”

WORKLOAD DASHBOARD CHANGES

Renewal/review work items will be created when a renewal is submitted through ACCESS, a PPRF is received and scanned, or a worker completes the Interview Details page after initiating a renewal from the Case Summary page. Creation of renewal/review work items will be similar to creation of application work items. Like application work items, if renewals for multiple programs are initiated or submitted together, the programs are tracked together using one renewal/review work item. If they are initiated or submitted separately, the programs will be tracked as separate renewal/review work items.

The steps for assigning, reassigning, and transferring work items will not change from the current process. The steps for withdrawing work items have changed and are outlined in the [“Withdrawing Work Item Enhancements” section](#) of this Memo.

CWW will display the following statuses on the Workload Dashboard:

- Received
- Processing
- Pending Verification

The work item will be completed when confirmation of all assistance groups (AG) related to the work item has been completed. Similar to application work items, the renewal/review work item is only considered complete after all programs on the work item have been confirmed. When “No Action Required on Inbox item” is selected on the ACCESS Renewal Summary page, the entire renewal/review work item is withdrawn.

The Work Item Search page, Search Results page, Work Item Details page, and Work Item panel will be updated to include renewals.

The Inbox Search and Search Results page will only search and display ACCESS renewals.

The Work Item Search and Search Results page will search for and display all ACCESS renewals, PPRFs, and renewals initiated by a worker.

My Dashboard Close						
Work Items	Days Left to Complete					
Category	Total	<1	1-7	8-14	15-30	>30
<input checked="" type="checkbox"/> Applications	3	3				
<input checked="" type="checkbox"/> Renewals / Reviews	608	589	3		15	1
<input checked="" type="checkbox"/> Received	277	267	1		9	
<input checked="" type="checkbox"/> Processing	10	9				1
..... FoodShare	1	1				
..... BadgerCare Plus	2	1				1
..... BadgerCare Plus CLA	1	1				
..... Medicare Premium Assistance	1	1				
..... Family Planning Waiver	1	1				
..... Child Care	3	3				
..... W-2	1	1				
<input checked="" type="checkbox"/> Pending Verification	117	116			1	
<input checked="" type="checkbox"/> SMRFs	1	1				
<input checked="" type="checkbox"/> Potential Errors	11	10			1	
<input checked="" type="checkbox"/> Discrepancies	268	261	6	1		

Figure 1 Workload Dashboard with Renewals Added

Work Item Search 3.5 3/02/2016

Criteria

How would you like to search?

By IM Consortium, County/Tribe, IM or W-2 Team
 By Work Item Owner
 By Primary Worker or Caseload
 By Case, RFA or ACCESS Tracking Number

By IM Consortium, County/Tribe, IM or W-2 Team

County / Tribe: [dropdown] [No] [dropdown]

IM Consortium: [11 - STATE CONSORTIUM] [dropdown] [No] [dropdown]

W-2 Geographical Area: [dropdown] [dropdown]

Additional Search Criteria

Category: [Renewal / Review] [dropdown]

Status: SELECT ALL Received Pending Verification Processing

Type: SELECT ALL FoodShare BadgerCare Plus CLA Medicare Premium Assistance BadgerCare Plus EBD Medicaid Institutional Medicaid

Special Attention: LTC

Figure 2 Work Item Search Page with Renewal/Review Added as a Category for Searching

SECURITY

All users with security level 25 or higher will now be able to withdraw application, renewal/review, and SMRF work items.

Only users with security level 50 or higher will continue to be able to reassign application, SMRF, potential error, and now renewal/review work items from each program. Only users with security level 99 will be able to withdraw discrepancy work items.

LONG-TERM CARE INDICATOR

The Work Item Search page, Search Results page, Work Item Details page, and Work Item panel will be updated to include a Long-Term Care (LTC) Indicator. For applications, the indicator will be set based on whether the applicant indicated on his or her application that someone in his or her household has a

need for long-term care services. For renewals, the LTC indicator will be set if either of the following applies:

- Someone on the case is in an open Institutional Medicaid or Community Waivers assistance group.
- At the time the renewal is received or initiated, someone on the case is in an Institutional Medicaid or Community Waivers assistance group that closed for lack of renewal within the last three months.

This same LTC indicator will also be added for the following:

- Changes and renewals on the Changes/SMRFs/Renewals Inbox Search Criteria page, along with the corresponding Search Results, Reassignment, and Renewal Summary pages.
- Change Search Results, Reassignment, and Summary pages.

The screenshot shows a web application interface for 'Work Item Search'. At the top right, there is a date '3.5 06/16/2016'. Below the title, there is a 'Criteria' section and a 'Results' section. The results are displayed in a table with the following columns: ACCESS/RFA/Case, Flag, Primary Worker, Category, Work Item Owner, Received Date, Special Attention, Type, Status, and Due Date. The table contains several rows of data, with some cells redacted with grey bars. The 'Special Attention' column contains the value 'LTC' for several rows. At the bottom left of the table, there is a 'Reassign' button.

ACCESS/RFA/Case	Flag	Primary Worker	Category	Work Item Owner	Received Date	Special Attention	Type	Status	Due Date
Case - [redacted]	Escalated	[redacted]	Renewal / Review	[redacted]	10/10/2007	LTC	BadgerCare Plus	Processing	11/09/2007
Case - [redacted]		[redacted]	Renewal / Review	[redacted]	11/01/2008	LTC	FoodShare	Pending Verification	12/10/2008
		[redacted]		[redacted]			Child Care	Pending Verification	12/10/2008
		[redacted]		[redacted]			BadgerCare Plus	Pending Verification	12/10/2008
Case - [redacted]		[redacted]	Renewal / Review	[redacted]	11/01/2008		FoodShare	Pending Verification	05/14/2009
ACCESS - [redacted]		[redacted]	Renewal / Review	[redacted]	01/05/2010	LTC	Family Planning Waiver	Received	02/04/2010
		[redacted]		[redacted]			Child Care	Received	02/04/2010
		[redacted]		[redacted]			FoodShare	Received	01/12/2010
		[redacted]		[redacted]			BadgerCare Plus	Received	02/04/2010
ACCESS - [redacted]		[redacted]	Renewal / Review	[redacted]	01/06/2010		Child Care	Received	02/05/2010
PPRF/Case - [redacted]		[redacted]	Renewal / Review	[redacted]	01/19/2010		FoodShare	Received	02/18/2010

Figure 3 Work Item Search Results Page Showing the LTC Indicator for Renewals

COMPANION CASE INDICATOR

The Inbox Search Criteria page and Inbox Search Results page will be updated to include the ability to search by Companion Case Indicator. The indicator will be set based on whether a companion case exists.

Inbox Search Criteria - Changes / SMRFs / Renewals Reset

Basic Search

What would you like to do?

View and Select Inbox Items

View and Select to Reassign Inbox Items

Display Counts of Inbox Items

Go

Advanced Search

Inbox Search Criteria Restore to Default Search Criteria Save Search Criteria

County/ Tribe:

IM Consortium:

Additional Search Criteria

Assigned Worker:

*Inbox Item Type:

Inbox Item Status:

Eligibility Office:

Supervisor Unit:

Case Worker:

Language:

First Letter of Applicant's Last Name: to

Received Date: Any Day

Between and

SMRF / Renewal Due Date: Any Month

Between and

Search by Program:

Health Care FoodShare Child Care

Family Planning Waiver Medicare Premium Assistance Child Care with KC / FC

Special Attention: LTC Companion Case

Has Related Unprocessed Items:

What would you like to do?

View and Select Inbox Items Meeting the Above Criteria

View and Select Inbox Items to Reassign Meeting the Above Criteria

Display Counts of Inbox Items Meeting the Above Criteria

Go

Figure 4 Inbox Search Criteria Page with the Companion Case Indicator

DUE DATES AND TIMELINESS

The processing due date (Days Left to Complete) for renewal/review work items is based on when the renewal is due and when it is submitted by the member or initiated by the worker. The normal renewal window is the time between the second Saturday of a given month, when the 45-day renewal letter is issued, through the end of the following month, when the renewal is due. The following is additional information about due dates logic for renewal/review work items:

- An on-time renewal is a renewal that is submitted by the member or initiated by the worker during the renewal window. The processing due date for on-time renewal work items (all programs) is the last day of the renewal month. For example, a May renewal submitted on May 10 has a processing due date of May 31.
- If a health care renewal is received prior to the renewal window, it is considered an early renewal and the due date for processing the renewal is 10 days from when it is received by the agency.
- If a W-2 worker initiates a review before the review window, the due date for processing the review is seven working days from when it is initiated by the W-2 worker.
- If a FoodShare renewal is received prior to adverse action of the month prior to the renewal due month, it is considered an early renewal and the due date for processing the renewal is 10 days from when it is received by the agency.

If a FoodShare renewal is received along with another program renewal or application, the agency may process both the FoodShare and the other program renewal regardless of the FoodShare renewal being early.

- If a late health care renewal is received (up to three months after the renewal due date), the due date for processing the renewal is 10 days from when it is received by the agency.
- When a W-2 review is initiated, the processing due date is based on the verification checklist due date or the last day of the review month, whichever comes first.
- If a Caretaker Supplement renewal is within the Caretaker Supplement renewal window, the processing due date for the renewal is the last day of the Caretaker Supplement renewal month. If it is not, then the following applies:
 - If Caretaker Supplement is the only program being renewed, the Caretaker Supplement processing due date logic will match the logic used for health care renewal work items.
 - If FoodShare or another health care program is also being renewed, the processing due date for Caretaker Supplement will match the due date of the program that is in the renewal window.
- The processing due date for Child Care renewals is the last day of the renewal month. Child Care renewals that are received within one month after the renewal month are considered late but are still processed as renewals.
- If a Child Care renewal is received prior to the renewal window, it is considered an early renewal and the due date for processing the renewal is 30 days from when it is received by the agency.

CARES WORKER WEB HOME PAGE CHANGES

To increase system performance and reduce duplication, the following counts will be removed from the CWW Home page:

- Apps with Priority Service
- Apps Received Before
- Apps Received After

- Total Number of Apps
- Online Renewals Received
- Online SMRFs Received
- SMRFs
- Employer Verifications

My Inbox Items		
Type	Counts	
Apps with Priority Service	0	
Apps Received Before 06/03/2016	0	
Apps Received After 06/03/2016	0	
Total number of Apps	0	
Online Change Reports	0	
Online Renewals Received	0	
Online SMRFs Received	0	
Appeals Assigned to Me	0	

My Tasks		
Type	Counts	
SMRFs	0	
Employer Verifications	1	
Cases with Unprocessed Documents	1	
Having Outstanding Verification Approaching	0	
Having Outstanding Verification Past Due	0	
Unlinked Document Batches	0	

Figure 5 CWW Home Page Shown with Changes to My Inbox Items and My Tasks

TEAM DASHBOARDS

Team dashboards will now be displayed on a worker’s CWW Home page if an agency has chosen that display and if that worker is part of the team. To choose to have the team dashboard displayed on team members’ homepages, the agency should select a new type, “Show on Homepage,” on the Team Details page for that team. This type, similar to other team types, will be editable: it can be added or removed from a team at any time.

Note: This excludes W-2 Geographical All Staff Teams, which are systematically created and updated.

Only the team dashboards that are selected as “Show on Homepage” and the signed-on worker’s own dashboard will be displayed on the Home page.

Team Details Cancel Reset

Team Attributes

Team ID:

• Team Name:

Purpose:

Current Size = 0 characters (200 characters max.)

• Type:  Show on Home Page

IM Change Center LTC

Child Care Core Non-English

W-2 EBD Other

• Location:

County / Tribe:

IM Consortium

W-2 Geographical Area

Last Updated:

Last Updated By:

Team Members

Worker ID:

Role:

Delete:

Worker Id	Last Name	First Name	County	Role	Last Updated	Last Updated By	Deleted	
-----------	-----------	------------	--------	------	--------------	-----------------	---------	--

Cancel

Figure 6 Team Details Page Showing How to Display Team Dashboard on the CWW Home Page

SYSTEMS
3.5 07/18/2016

Navigation Menu

Search

- CARES Home
- Search
- Inbox Search
- Unlinked Documents
- RFA / Case**
- Client Registration (0)
- Case Summary
- Case Comments
- Expected Changes
- Application Entry (0)
- Generate Summary
- Initiate Eligibility Determination
- Eligibility
- Post Eligibility
- Potential Error Listing
- Confirm Eligibility
- Refer to FSET
- FS Clock
- Override AG Renewal / Review Dates
- W-2 Post Eligibility
- Post Confirmation
- Query
- Benefit Issuance
- Worker Tools**
- FSET Tool
- IMCA 2nd Party

CARES Worker Web Home

Recent Cases/RFAs/ACCESS Applications/Change Reports/PINs

Type	Number	Primary Person/Individual	Accessed	
Case	0003196402	KINDA ABER 33F PP	07/15/2016	🔍
Case	0000929409	MACKO BILL 50M PP	07/15/2016	🔍
Online Renewal	3700674333	MACKO BILL	07/15/2016	🔍
Case	0116474602	LASHANDA HOBBS 28F PP	07/14/2016	🔍
Case	4003195248	KAIKOSYS DOLT 36M PP	07/14/2016	🔍
Case	5003196156	MURRAYSYS ANDY 66M PP	07/14/2016	🔍
Case	3003196537	ROGER WARN 56M PP	07/14/2016	🔍
Case	5003197551	HUTLEREBDSYS TRAIN 67M PP	07/14/2016	🔍
Case	4003196244	JILAN JOY 35F PP	07/13/2016	🔍
Case	5003196555	COMMSYS MC 36M PP	07/13/2016	🔍

My Dashboard [View Workload Dashboard](#)

Work Items	Days Left To Complete						
	Category	Total	<1	1-7	8-14	15-30	>30
Applications		0					
➤ Renewals / Reviews		1	1				
SMRFs		0					
Potential Errors		0					
Discrepancies		0					

Work Item Dashboard for APPTTEAMDB - MILWAUKEE COUNTY

Work Items	Days Left To Complete						
	Category	Total	<1	1-7	8-14	15-30	>30
Applications		0					
➤ Renewals / Reviews		1	1				
SMRFs		0					
Potential Errors		0					
Discrepancies		0					

My Tasks

Type	Counts	
Online Change Reports	0	🔍
Appeals Assigned to Me	0	🔍
Cases with Unprocessed Documents	0	🔍
Having Outstanding Verification Approaching	0	🔍
Having Outstanding Verification Past Due	0	🔍
Unlinked Document Batches	1	🔍

Broadcast Messages

1 of 2 Pages

Issue Date	Message Description
06/13/2006	***** PROCESSING ACCESS OR MAIL IN APPLICATIONS ***** REMINDER, IF YOU ARE PROCESSING AN ACCESS OR MAIL IN APPLICATION AND ARE GOING TO RUN ELIGIBILITY USING HOST ON DEMAND, YOU NEED TO CLICK THE "ELIGIBILITY" BUTTON BEFORE RUNNING THE CASE THROUGH HOD. IF YOU DO NOT, YOU WILL GET A MESSAGE THAT CWW PAGES ARE INCOMPLETE.
06/13/2006	SSN VERIFICATION PROCESSED-EXCHANGE TYPE:SSWS
06/12/2006	SSN VERIFICATION PROCESSED-EXCHANGE TYPE:SSWS
06/10/2006	REFERENCE TABLE MC COMPLETE - EXCEPTION RPT PRODUCED
06/10/2006	SSN VERIFICATION PROCESSED-EXCHANGE TYPE:SSWS

Figure 7 CARES Worker Web Home Page with Team Dashboard

WORK ITEM ENHANCEMENTS

WORK ITEM FLAGS

Currently, there are three options for flags on work items:

- Reviewed: Set by workers to show that a work item has been reviewed but not yet completed.
- Escalated: Indicates a work item that may require supervisor review.
- Withdraw Requested: Indicates that a work item should be potentially withdrawn.

These flags will continue to be used for renewals. Based on IM agency feedback, the following flag options will be added, so workers can see the details of their work items on the Workload Dashboard:

- Other AG Pending Case is Correct: This flag is for health care applications and renewals that have been processed and are pending for another type of health care.

Example 1: BadgerCare Plus is processed to BadgerCare Plus CLA pending. The work item updates correctly from BadgerCare Case Processing to BadgerCare Plus CLA Pending Verification, but the Dashboard still reflects BadgerCare Plus CLA pending and BadgerCare Plus in “case processing.” Case processing is a cue to a worker that something still has to be processed on the case. Workers will use this after they have reviewed the case and have determined it has been correctly processed so they don’t continue to revisit that specific work item.

- System Error Reported: This flag will be used when there is a system error on the case that prevents processing and that error has been reported to the CARES Call Center for a fix before the renewal can be processed.
- VCL Issued Manually: This flag will show on cases where a system-generated verification checklist is not able to be issued when processing.

Due Date	Rec Date	Category	Type(s)	Worker	Flag
07/18/2016	07/08/2016	Renewal / Review	FoodShare,Child Care,BadgerCare Plus	XCTA3X	<ul style="list-style-type: none"> Withdraw Requested Escalated Reviewed Other AG Pending Case is Correct System Error Reported VCL Issued Manually

Figure 8 New Work Item Flags

WITHDRAWING WORK ITEM ENHANCEMENTS

To better document the reasons why work item types (programs) are withdrawn, the withdrawal functionality is now at the program level, and a reason is required to complete a withdrawal. If all work item types in a work item are withdrawn, the work item will be marked “withdrawn.” Workers will no longer be able to withdraw an entire work item.

REASONS FOR WITHDRAWING WORK ITEMS

When withdrawing work item types, workers have to identify the reason for the withdrawal. The following are reasons for withdrawing work items for applications, SMRFs, potential errors and discrepancies, and renewals/reviews:

Applications:

- Application to be processed as renewal
- Duplicate application
- System problem
- Applicant derequested this program
- Applicant already receiving benefit

SMRFs:

- System problem
- Renewal processed in place of SMRF
- SMRF submitted in error
- FS no longer open. SMRF not needed

Potential Error:

- System problem

Discrepancy:

- System problem: There are no changes for the security restriction preventing workers from withdrawing Discrepancy work items.

Renewal/Review:

- Program was administratively renewed
- Duplicate renewal submission
- Member opted not to complete early renewal
- Member opted not to renew the program

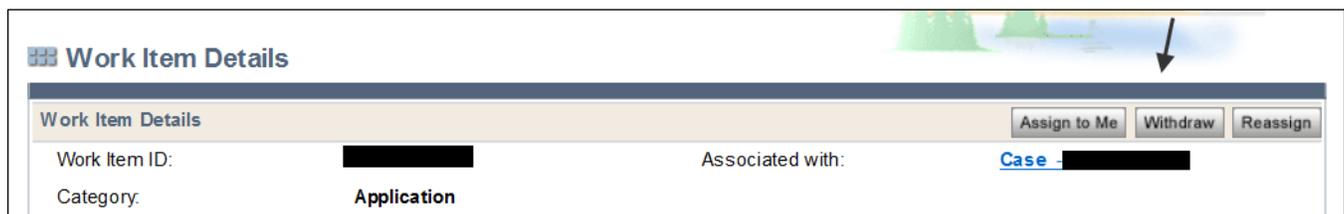


Figure 9 Withdraw Functionality on the Work Item Details Page

Example 2: A FoodShare application is submitted. During the interview, the applicant states that he or she no longer wants to apply for FoodShare. The worker will be able to withdraw the FoodShare request on the work item to show the applicant is no longer requesting FoodShare; this would close the entire work item.

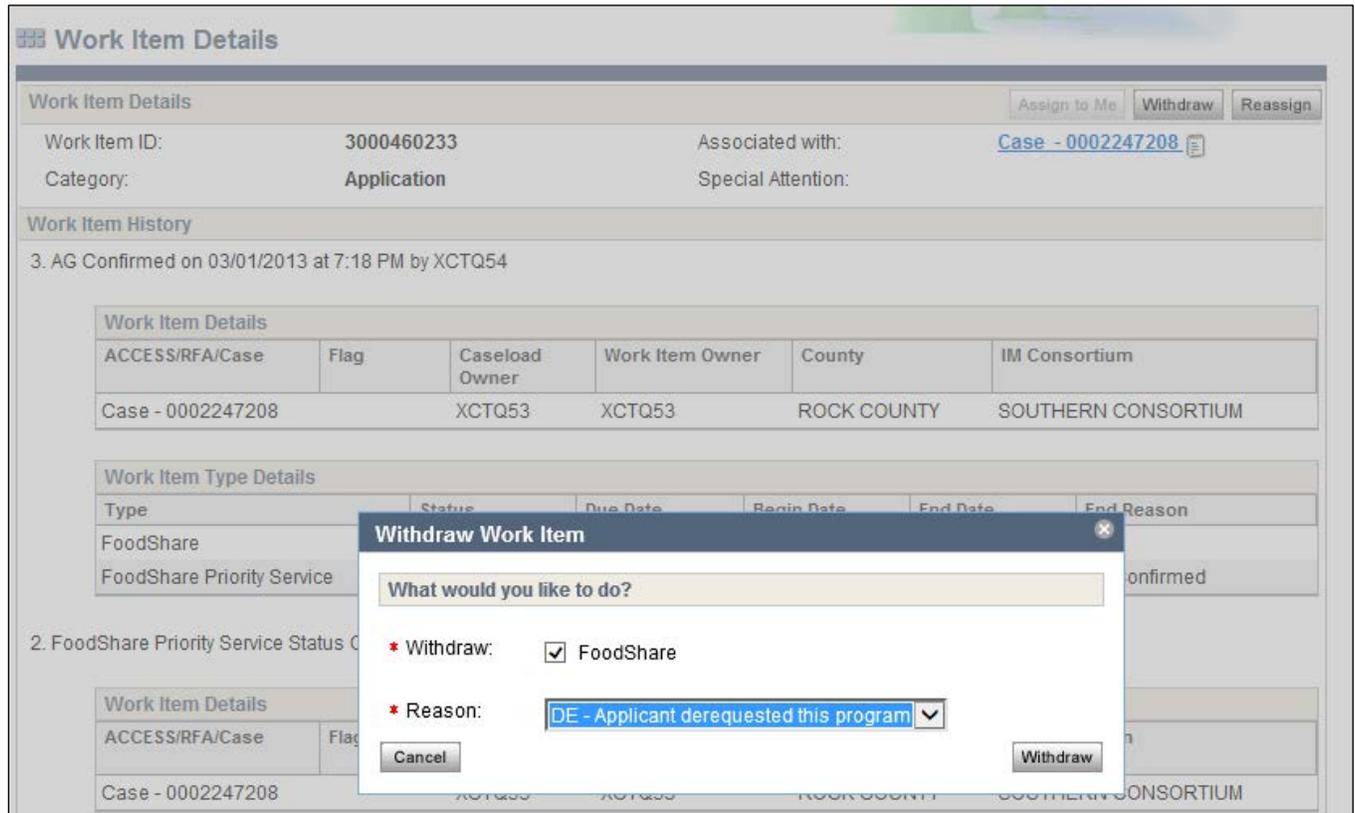


Figure 10 Withdrawal of Single Program Work Item

Example 3: BadgerCare Plus and FoodShare renewals are submitted. During the FoodShare interview, the member states that he or she no longer wants to renew their FoodShare benefits. The worker will be able to update the FoodShare request on the work item to show the member is no longer renewing FoodShare. This will withdraw the FoodShare work item type; however, the overall work item, as well as the BadgerCare Plus work item type, will remain on the dashboard.

Work Item Details

Work Item ID: 7001122076 Associated with: [ACCESS - 7701657975](#)
Category: Renewal / Review Special Attention:

Work Item History

1. ACCESS Renewal Received on 07/19/2016 at 11:08 AM by SYSTEM

ACCESS/RFA/Case	Flag	Caseload Owner	Work Item Owner	County	IM Consortium
ACCESS - 7701657975		XCTQ53	XCTQ53	ROCK COUNTY	SOUTHERN CONSORTIUM

Work Item Type Details

Type	Reason
BadgerCare Plus	
FoodShare	

Withdraw Work Item

What would you like to do?

* Withdraw: BadgerCare Plus
 FoodShare

* Reason: [NR - Member opted not to renew the prog](#)

Cancel Withdraw

Figure 11 Withdrawal of Multiple Programs Work Item

WORK ITEM SEARCH RESULTS PAGE

The column currently labeled as “APP/RFA/Case” on the Work Item Search Results page will be renamed “ACCESS/RFA/Case.” In addition, any item in the listing that corresponds to an ACCESS Tracking Number will display the prefix “ACCESS” instead of “App.”

Work Item Search

Criteria

Results

1 of 10 Pages

ACCESS/RFA/Case	Flag	Primary Worker	Category	Work Item Owner	Received Date	Special Attention	Type	Status	Due Date
Case - [REDACTED]	Escalated	[REDACTED]	Renewal / Review	[REDACTED]	10/10/2007	LTC	BadgerCare Plus	Processing	11/09/2007
Case - [REDACTED]		[REDACTED]	Renewal / Review	[REDACTED]	11/01/2008	LTC	FoodShare	Pending Verification	12/10/2008
		[REDACTED]		[REDACTED]			Child Care	Pending Verification	12/10/2008
		[REDACTED]		[REDACTED]			BadgerCare Plus	Pending Verification	12/10/2008
Case - [REDACTED]		[REDACTED]	Renewal / Review	[REDACTED]	11/01/2008		FoodShare	Pending Verification	05/14/2009
ACCESS - [REDACTED]		[REDACTED]	Renewal / Review	[REDACTED]	01/05/2010	LTC	Family Planning Waiver	Received	02/04/2010
		[REDACTED]		[REDACTED]			Child Care	Received	02/04/2010
		[REDACTED]		[REDACTED]			FoodShare	Received	01/12/2010
		[REDACTED]		[REDACTED]			BadgerCare Plus	Received	02/04/2010
ACCESS - [REDACTED]		[REDACTED]	Renewal / Review	[REDACTED]	01/06/2010		Child Care	Received	02/05/2010
PPRF/Case - [REDACTED]		[REDACTED]	Renewal / Review	[REDACTED]	01/19/2010		FoodShare	Received	02/18/2010

Reassign

Figure 12 Work Item Search Results Page with New ACCESS/RFA/Case and ACCESS Headers

APPLICATION/REVIEW INTERVIEW DETAILS PAGE

The Application/Review Interview Details page will be renamed Interview Details page.

Interview Details Cancel Reset

The following events have occurred:

AE416: Online Renewal for 'FoodShare, Child Care and Health Care' received on 07/08/2016.

Request / Renewal / Review Date	Program	Mode	*Interview Type	Last Updated
07/08/2016	CC - CHILD CARE	Renewal / Review	? - Pending Interview	07/08/2016
07/08/2016	FS - FOODSHARE	Renewal / Review	N - No Renewal / Review	07/08/2016
07/08/2016	MA - HEALTH CARE	Renewal / Review	A - ACCESS application	07/08/2016
07/08/2016	WW - W-2	Renewal / Review	N - No Renewal / Review	07/08/2016

Figure 13 Interview Details Page

ALERT REMOVALS

The following renewal-based alerts will no longer be created:

- 19 FSET Case Review Due
- 20 FSET Case Review Past Due
- 47 Eligibility Review No-Show

- 84 Eligibility Review Past Due
- 161 WNW Case Review Due
- 162 WNW Case Review Past Due
- 229 W2 Case Review Due
- 230 W2 Case Review Past Due
- 274 A CC Review Is Initiated
- 290 Review Due, Last Review NFTF
- 291 Review Due, Last Review FTF
- 450 Process Online CC Review
- 451 Process Online CC SMRF

CONVERSION

Only unprocessed ACCESS renewals in the Inbox will have renewal/review work items created at the time of implementation.

AUTOMATION OF PRE-PRINTED RENEWAL FORMS

Starting with the 45-day renewal letters issued on October 8, 2016, CWW will automatically issue a PPRF as an attachment to the 45-day renewal letter when health care and/or Caretaker Supplement is due for a renewal. As a result, the 45-day renewal letters that include health care and/or Caretaker Supplement will be updated to reference and provide instructions for the PPRF.

If a renewal is due for a case with FoodShare only, the PPRF will not be enclosed with the 45-day renewal letter. Households will continue to receive separate 45-day renewal letters without PPRFs for Child Care and W-2 reviews.

There may be certain scenarios, such as a case in an unfinished driver flow, that will prevent the PPRF from generating with the 45-day renewal letter for health care and/or Caretaker Supplement. In these scenarios, members will be sent a version of the 45-day renewal letter that instructs him or her to contact the agency if he or she would like a PPRF. When a worker generates a PPRF on the Generate Case Summary page, a revised cover letter will be sent with the PPRF. Please see the [attachment to this Memo](#) for samples of the updated 45-day renewal letters and PPRF cover letter.

PRE-PRINTED RENEWAL FORM AND CASE SUMMARY ENHANCEMENTS

The PPRF and case summary will be enhanced to include only information that is relevant to the member's eligibility determination. The logic will be updated to exclude case information that is not relevant to the eligibility determination of the program(s) open or under review. For example, income or asset types that are not counted under the program rules would not be displayed on the PPRF or case summary. The display logic is dependent upon how the PPRF or case summary document is generated.

When a PPRF is automatically generated to be included with the 45-day renewal letter, the document will only include relevant information specific to the program(s) due for renewal. When a worker generates a PPRF or case summary on the Generate Summary page, it will include information relevant to all programs open on the case.

To ensure that the PPRF and case summary accurately reflect the member’s circumstances, these documents will also be updated to identify things the member has reported as not applying to anyone in the household. If such information is relevant for program eligibility, the section will be included in the PPRF or case summary with a statement to indicate that no one in the household has reported the corresponding information. The relevant sections include the following:

- Pregnancy Information
- Long-Term Care Services
- Settlement Information
- Health Care Coverage Information
- Assets
- Other Asset Summary Questions
- Job Income Information
- Self-Employment Information
- Room and Meals Income Information
- Other Income Information
- Educational Aid Information
- Shelter information
- Utility Information
- Heating Assistance Information
- Housing Assistance Information
- Other Bills Questions
- Dependent Care Bills
- BadgerCare Plus Tax Deductions

Example 4: If an Elderly, Blind or Disabled (EBD) Medicaid case does not have asset information on file, the PPRF or case summary would display the following text in the Assets section: “You told us no one in your home has assets (for example, bank accounts, stocks, bonds, vehicles, life insurance, real property, personal property, or burial assets.)”

If the case has some reported information for Job Income Information, Self-Employment Information, and/or Other Income Information, the PPRF or case summary will display a statement to indicate that the information displayed in that section is the only information on file for the household.

Example 5: If any self-employment is reported on a case, the following will be displayed on the PPRF or case summary:

Self-Employment Information

The self-employment listed below is the only self-employment we have on file for the people in your home.

Person	Type and Name of Self Employment	Earnings per month	Hours per month	Business Expenses per month	Depreciation Amount
TESTCHILDLESS Age: 37	BAKERY-TEST BAKERY	\$120.00	40	\$60.00	
	Other Disallowed Expenses	Additional disallowed expenses for Child Care	Business Start Month	Most Recent Business Taxes Filed Year	
	259.00	\$99.00	10/2015	0	

The PPRF will be identified with a document code of “PPRF” in the upper right corner of each page. The case summary will continue to be identified with a document code of “APP,” which will now be in the upper right corner of each page if the signature type selected is “Written.”

FOODSHARE RENEWALS

As described earlier in this Memo, a PPRF will not be included as an attachment to the 45-day renewal letter if FoodShare is the only program due for renewal. However, for cases where FoodShare is due for renewal at the same time as health care and/or Caretaker Supplement, a PPRF will be included as an attachment to the 45-day renewal letter. The PPRF will contain the necessary information for FoodShare such as utility information. Therefore, the PPRF is considered a renewal form for FoodShare.

If a PPRF that includes FoodShare information is returned, agencies must contact the member and process the FoodShare renewal according to current processing timelines. For additional on-demand processing details, see [Operations Memo 15-49](#).

Note: The signature page of the health care-only PPRF no longer has the checkbox that refers to FoodShare.

SCANNING THE PRE-PRINTED RENEWAL FORM AND CASE SUMMARY

The PPRF will be stored in the Electronic Case File (ECF) under a new document type titled “Pre-Printed Renewal Form,” with the document code of PPRF. All pages of the PPRF returned by the member, including the signature page, must be scanned into ECF using the PPRF code.

The case summary will continue to be stored in the ECF under the document code APP. All pages of the summary returned by the member must be scanned into the ECF using the APP code.

Workers should ensure that they use the appropriate batch class when scanning the PPRF and case summary. Scanner operators have the option to use the Scan First (ScanFirst) or Process First (ProcFirst) option with their documents. ProcFirst batch classes are for those documents that have been reviewed and processed by an IM worker before being scanned. Agencies can continue to scan and validate documents for ProcFirst using these codes:

- ProcFirst MultiPage P1
- ProcFirst SinglePage P1

ScanFirst batch classes are for those documents that are being scanned as soon as they come into an agency. They are not seen or processed by an IM worker before being scanned; for renewals, they will create a work item on the Workload Dashboard. Agencies can continue to scan and validate documents for ScanFirst using these codes:

- ScanFirst MultiPage1
- ScanFirst SinglePage1

If a PPRF is processed upon receipt at the IM agency, it should be scanned using the ProcFirst batch class. If ScanFirst is used for a PPRF that has already been processed, a duplicate work item will appear on the Workload Dashboard.

PPRFs may be returned directly to the Centralized Document Processing Unit (CDPU) or Milwaukee Document Processing Unit (MDPU). If this happens, the CDPU or MDPU will scan the PPRF using the PPRF code, and the renewal will appear as a work item on the Workload Dashboard. Once the PPRF is scanned using the ScanFirst approach, the worker should follow the current process.

When the PPRF is scanned by the CDPU, MDPU, or agency using ScanFirst, a work item will appear on the Workload Dashboard with work item subtypes corresponding to the programs that were due for renewal when the 45-day renewal letter and PPRF were sent.

For a PPRF that is returned by the member and then scanned:

- If the PPRF was sent with the 45-day renewal letter on a health care only case, there will only be one work item type, and it will be for health care.
- If the PPRF was sent with the 45-day renewal letter on a health care and FoodShare case in which both programs were due for renewal, there will be one work item with two work item types, one for health care and one for FoodShare.
- If the PPRF was sent with the 45-day renewal letter on a health care and FoodShare case, but only health care is due for renewal, there will only be one work item type, and it will be for health care.
- If a worker generated a PPRF from the Generate Case Summary page, and the PPRF was returned by the member and then scanned, the work item types would be set based on the open programs on the case when the PPRF was scanned.
- If a late PPRF is returned and scanned, an application work item will be created, instead of a renewal work item. The following are examples of when a PPRF would be considered late:
 - For health care or Family Planning Only Services, if the PPRF was returned later than three months after the end of the renewal month.
 - For Caretaker Supplement, if the PPRF was returned later than one month after the end of the renewal month.
 - For FoodShare, if the PPRF was returned after the end of the renewal month.

ScanFirst documents and/or unprocessed documents for the case will be available to all workers in the Information Bar. The Information Bar includes a Document Panel that shows all unprocessed documents linked to the case. Clicking on the magnifying glass link will take the worker to the Document Viewer displaying the image of the corresponding document within the context of all other unprocessed documents for the case.

CONTACTS

BEPS CARES Information and Problem Resolution Center

For Child Care policy questions outside of Milwaukee County: Bureau of Regional Operations (BRO), Child Care Coordinators at http://dcf.wisconsin.gov/regional_operations/pdf/contact-list.pdf

For Child Care CARES/CWW, CSAW, and CCPI IT systems processing questions statewide and policy questions in Milwaukee County: Child Care Help Desk at childcare@wisconsin.gov or 608-264-1657

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

DHS/DHCAA/BEPS/AW, NH

DCF/DFES/BWF/GS

DCF/DECE/BELP/PZ