

**WISCONSIN DEPARTMENT OF HEALTH SERVICES**  
**Division of Health Care Access and Accountability**  
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To: Process Help Users

From: Shawn Tessmann, Bureau Director  
Bureau of Enrollment Policy and Systems

Re: **Process Help Release 15-02**  
Release Date: June 22, 2015  
Effective Date: June 22, 2015

**EFFECTIVE DATE** The following process additions, clarifications or changes are **effective June 22, 2015** unless otherwise noted. **Grey highlighted text denotes new text. Text with a strike through it denotes deleted text.**

**CHANGES**

**44.1.3 Querying Data Exchange Screens**

Data Exchange information may be accessed through CWW or the CARES mainframe (Host on Demand). ACCESS via HOD is through either the use of menus within CARES or through the use of PARMS and TRAN CODES. ~~Some~~ All Queries are available through CWW. SOLQ must be accessed through the mainframe. Wage, SOLQI, Citizenship and Identity (Health Care requests only), New Hire, UIB and Birth Queries are accessed through CWW.

**44.4.1 Discrepancies**

**44.4.1 Discrepancies Discrepancy Assignments and Work Items**

Discrepancies and Discrepancy Work Items (similar to action items) display in the information bar in CWW. These alert the primary workers to discrepancies with Data Exchange auto updates (UIB and SOLQ-I) or Data Exchange matches (SWICA, Prisoner Match). Once a Discrepancy is set, it can be viewed from the case summary page or from any page within the case from either the Discrepancies tab or the Work Items tab. CARES does not recreate the same discrepancy if the discrepancy already exists. Over time, as more Data Exchanges become available, additional types will be added.

*New image added.*

Currently, there are 4 different types of discrepancies (SOLQI is a real time future update not available yet in CARES):

1. Unemployment Insurance (UIB)
2. SWICA
3. Prisoner
4. SOLQ-I

A Discrepancy occurs when a Data Exchange/match is done and information is either not updated or there is discrepant information on the case that has to be resolved. For UIB, SOLQ-I and prisoner discrepancies, the worker must take action timely before running eligibility and confirming benefits to ensure accurate eligibility is determined and to prevent overpayments. For SWICA, the worker has 45 days to resolve this IEVS match since it is a process done retroactively comparing income in CARES to wages reported for a past period of time. If a discrepancy is not resolved within 45 days, the discrepancy will be highlighted in red and an alert will be sent to the primary worker's supervisor providing notification of the past due discrepancy.

~~Discrepancies are set to the primary worker. When the primary worker is not the W-2~~

and/or CC worker, the W-2 and/or CC worker will be notified of Discrepancies through a Batch alert.

Once a Discrepancy is set on a case, it will display in the information bar at the top of the page (next to Action Items and Documents), however, secondary workers will only receive alerts for Discrepancies through batch. The system will not recreate the same Discrepancy if it already exists. The Discrepancy is assigned to the primary worker for a case.

**Workers must be aware of discrepancies while processing a case and take corrective action on the case before running eligibility or confirming benefits.**

**Important Note:** The secondary worker must not update the status of the discrepancy in the information bar. If the secondary worker updates the status of the discrepancy, CARES will remove it from the information bar and remove the discrepancy from the primary worker's "My Tasks". The primary worker may not ever know that it existed. However, if the primary worker updates the status of the discrepancy before the secondary worker has an opportunity to follow-up on it, the alert will remain for the secondary worker as a reminder. For that reason, in cases with both a primary and a secondary worker, the secondary worker must provide updates to discrepancies in case comments. Case comments are essential in order to track actions on the case.

The primary worker's home page will display the total count of cases with discrepancies for that worker.

**Note:** the number of outstanding discrepancies on the primary worker's home page may not be the same as the count from searching for a list of discrepancies. This is because discrepancies are dynamic and can be created at any point in the process of updating a case.

To get a list of outstanding discrepancies and work from the Search Results list to resolve those discrepancies, workers can click on the magnifying glass from My Tasks. When the worker selects the case s/he will be taken to the Case Summary page to resolve any discrepancies for that case. The worker can navigate back to the Search Results list by clicking on the "Return to Search Results" tab within the case.

Workers can also search for outstanding discrepancies from the Caseload Management Search Criteria page.

### **Caseload Management Search Criteria**

*Image deleted.*

This function can be used by workers and supervisors to query outstanding discrepancies by using county, office, worker or caseload number.

### **Caseload Management Search Criteria Result**

*Image deleted.*

From the list, workers can select the case and navigate to the Case Summary page by hitting the 'next' button.

*Image deleted.*

From the case, the primary or secondary worker can view the discrepancies for that case, however only primary workers must make the appropriate updates to resolve the Discrepancy and update the status.

~~The worker can then return to the Search Results from the case.~~

~~Once the worker has taken the appropriate corrective action to resolve the Discrepancy, the worker must update the status by choosing one of the options displayed next to the Discrepancy.~~

~~Resolved  
No Impact  
Withdrawn  
Duplicate  
Huber or Bracelet (Prisoner Discrepancy only)~~

~~If the worker still needs more information to resolve the discrepancy, s/he can change the status to:~~

~~Client Info  
Fraud  
Third Party Verification~~

### **Discrepancy History**

Workers can access an individual's discrepancy history for UIB, SOLQI, prisoners match, and SWICA () by clicking on the 'View Individual DX Discrepancy History' radio button on the Individual Summary page.

<current screen shot>  
<current screen shot>  
<current screen shot>  
<current screen shot>

Workers can access the discrepancy history for UIB, SOLQ-I and SWICA for an individual by clicking on the 'View Individual DX Discrepancy History' radio button on the Individual Summary Page. If there are resolved discrepancies present for an individual, the discrepancy will display on the Discrepancy History Results Page.

If there are resolved discrepancies present for an individual, the following screen will be displayed to the worker.

- The worker can filter by discrepancy type or resolved date using the navigator at the bottom of the page.
- To navigate by Source, the worker can click on the icon on either the left or right or select using the dropdown.
- To navigate using resolved date, the worker can enter the date in the field provided and click "go."

**Accessing Discrepancy Work Items** (see Chapter 53 for more information about the Workload Dashboard).

Workers can access Discrepancies from the Discrepancy Panel on the case, the Work Item Panel on the case or the Dashboard. Discrepancy work item assignments will be assigned to the program areas that are potentially affected by the discrepancy on a case (IM, CC, W-2). For each affected program area, CARES will assign a corresponding Dashboard Work Item to the relevant worker on the case (IM worker, CC eligibility worker, or FEP worker). Each program area can independently find and "work" the discrepancy according to its program's policy and process. In addition, discrepancy work items will be able to be reassigned just like application work items can be reassigned today.

**IM Worker View**

*New image added.*

**W-2 Fep View**

*New image added.*

See Chapter 53 for specific details on Discrepancy Work Items, the Dashboard and navigating.

## **Discrepancy Panel**

Once a discrepancy is set, it can be accessed from the Information Bar on any page via the Discrepancies Panel or the Work Items Panel or from the Worker or Agency Dashboard. However, the discrepancy can only be completed and documentation entered from the Discrepancy panel.

The discrepancy count (displayed in parenthesis on the information bar) will reflect only the count of those unresolved discrepancy assignments that are assigned to the logged-in worker's program area(s).

*New image added.*

*New image added.*

The Discrepancy panel provides an overview of all unresolved discrepancies associated with a particular case. It also allows all workers to resolve and complete their discrepancy assignments and add comments to document their discrepancy resolution details.

The original status of a discrepancy is "Not Started."

The discrepancy is considered "Pending" when the worker indicates one of the following statuses:

- Waiting for Customer Info
- Potential Fraud
- Waiting for 3rd Party Ver

A discrepancy status of "Pending" requires more information before the discrepancy can be completed.

The discrepancy is considered "Complete" when the worker has received the additional information to finish the discrepancy. He or she must change the status to one of the following:

- Resolved - Elig Issue (this means there was an impact to benefits)
- Resolved - No Impact (this means there was no impact to benefits)
- Duplicate or Huber or Bracelet (this is for Prisoner discrepancies only)

## **Field Specific Details on the Discrepancy Panel Screenshot**

1. Discrepancies: The discrepancy count (displayed in parentheses in the information bar) will only reflect the count of unresolved discrepancy assignments that are assigned to the logged-in worker's program area(s).
2. Magnifying glass: The worker will click this to access the discrepancy details.
3. Program Area: This is the program area for which the discrepancy assignment was created. This will be IM, W-2, or CC.  
**Reminder:** A separate discrepancy will only be assigned to the CC worker if the assigned CC worker on the ChildCare Activity Status page is different from the primary worker on the case.
4. Status: This is the status of the discrepancy (i.e., "Not Started," "Pending" or "Complete"). If the worker still needs more information to resolve the discrepancy, he or she can select one of the following statuses (which will put the discrepancy assignment into a "Pending" status):

- Waiting for Customer Info
- Fraud
- Waiting for 3rd Party Ver

5. Comment: Workers must enter comments in the Comment field when a discrepancy status is changed and when completing the discrepancy assignment. Comments entered here will be saved to Case Comments with "Discrepancy" indicated as the Comment Type. A maximum of 750 characters is allowed. Workers must select "Update" to save the comments entered. When workers complete their discrepancies, documentation must be entered documenting either why there was no impact or what the impact was.

*New image added.*

In rare situations, different workers may be updating the Discrepancy panel at the same time. If this occurs, the worker will receive the following error message:

GL320: It appears that information entered could not be saved to the database. This may have either been caused by another user updating data at the same time or because of a system error. Please navigate to another screen and re-open the Discrepancy panel to make your changes.

When this happens, the worker will need to collapse the panel and re enter the information. To do this, the worker can click anywhere outside of the panel or on the "down" arrow next to the Discrepancies tab.

*New image added.*

Since CWW tracks the discrepancy assignments of all program areas, it is possible that an IM worker and a FEP will both have the same type of discrepancy, but each will have a different discrepancy assignment. The IM worker and the FEP each have to resolve the discrepancy for his or her own program area.

All discrepancies are created for an individual, and each discrepancy is also associated with a case:

- SWICA and Prisoner discrepancies are displayed at a case level; they will only appear on the original case for which they were created and can only be updated through the Discrepancy panel for that case.
- SOLQ-I and UIB discrepancies are displayed at the PIN (personal identification number) level; they will display and can be updated through the Discrepancy panel for any case in which the individual is listed.

IM and FEP workers must complete their separate discrepancy assignments. The exception is for SOLQ-I discrepancy assignments. When an SOLQ-I discrepancy assignment is resolved, all "Not Started" discrepancy assignments associated with that discrepancy will be automatically resolved with the same resolution status. A case comment will be entered (e.g., "Processed by other Worker"), and "System" will be selected in the Last Updated By field.

*Examples 1-4 are new.*

#### 44.4.2.4 SOLQ-I

*Image deleted.*

#### 46.2 Organizing Case Comments

**Comment Type:** You can mark a comment as a specific type of comment from the dropdown box. Comments can be marked as "Change, General, Intake, Review or Client Registration." Specifying the "Comment Type" will help you and or coworkers later sort and find comments by type. Click Add after you're done entering the comment. When a discrepancy status is changed and when completing a discrepancy assignment, comments entered will be saved to Case Comments with

“Discrepancy” indicated as the Comment Type.

### 53.1 Workload Dashboard Overview

The Workload Dashboard is a tool that may be used to monitor timely case processing, efficiency and accuracy, predict upcoming workload and support increased caseloads and team structures. The Workload Dashboard provides a quick view of all Applications, Six Month Report Forms (SMRFs), and Potential Errors and Discrepancy Work Item assignments currently assigned to a Worker, Team, County/Tribe, IM Consortium and State.

The Dashboard will assist workers to process their cases timely and efficiently. A worker is to utilize their Workload Dashboard to find and prioritize his/her work. The Workload Dashboard provides counts of Application, SMRF, and Potential Error and Discrepancy Assignment work items, which are arranged by the number of days left to complete the work through confirmation in a timely manner. By default, the dashboard(s) load displaying only the top level counts for the categories (Applications, SMRFs, and Potential Errors and Discrepancy Assignments). All categories will display regardless if there are any Work Items in a category.

*New image added.*

### 53.2.1 Opening A Workload Dashboard Introduction

*New images added.*

### 53.2.7 Closing a Dashboard A Dashboard will remain open

*New image added.*

### 53.3.2 Work Items

Work Items are displayed on the Dashboard and include the following Work Item categories:

- Applications
- SMRFs
- Potential Errors
- Discrepancies

### 53.3.3 Application Types

The Application Types that display on the Workload Dashboard:

- FoodShare Priority Service
- FoodShare
- BC+ for Families BadgerCare Plus
- BC+ CLA
- BadgerCare Plus (FFM)
- BadgerCare Plus CLA
- BadgerCare Plus CLA (FFM)
- EBD Medicaid
- EBD Medicaid (FFM)
- Medicare Premium Assistance
- Institution Medicaid
- Family Planning Waiver
- LIS RFA
- Health Care RFA
- Caretaker Supplement
- Child Care
- W-2

### 53.3.6.1 Error Prone Profile (EPP) Types

### 53.3.6.1 53.3.7 Error Prone Profile (EPP) Types

The EPP Types that display on the Workload Dashboard are:

- Questionable Income and/or Expenses
- Unresolved Discrepancies

**Note:** Multiple discrepancy assignments originating from the same discrepancy will count as one unique discrepancy for the Error Prone Profile (EPP) detection process. W-2 is not included in the EPP Detection process and therefore, discrepancy assignments created for W-2 will not be counted

- in the EPP detection process.
- IPV/Overpayment History

### 53.3.6.2 Potential Error Work Item Statuses

### 53.3.6.2 53.3.8 Potential Error Work Item Statuses

#### Work Item Search

The Potential Error Category has been added to the Work Item Search page. The search functionality has not changed.

<image>

#### Work Item Search Results

The History Icon will navigate you to the Work Item Details page.

<image>

#### Work Item Reassignment

The Potential Error Work Item can be reassigned via the reassignment page. The functionality of this page has not changed.

### 53.3.9 Discrepancy Work Items

This section is new.

### 53.3.10 Discrepancy Work Item Statuses

This section is new.

### 53.3.7 Days Left to Complete

### 53.3.7 53.3.11 Days Left to Complete

*New image added.*

The Total Column represents the total for each category (Application, SMRFs, and Potential Errors and Discrepancies). The total will add up horizontally, but not vertically. When expanded, the total represents the number of types (FS, BC+) for all applications or SMRFs.

In this example there are 2056 3119 Applications/RFAs, but when expanded, the totals for the status do not add up to 2056 3119.

### 53.4.2 Work Item Flag

Work Items can be flagged with:

- **Not Reviewed (appears as blank):** This is the default Work Item Flag, which indicates that a Work Item has not been reviewed or completed).
- **Reviewed:** Set by workers to show that a Work Item has been reviewed, but not yet completed.
- **Escalated:** Indicates that a Work Item may require Supervisor review.
- **Withdraw Requested:** Indicates that a Work Item should be potentially withdrawn

**Note:** Because Discrepancy Work Items should never be withdrawn, only completed, only users with a Security of 99 or higher (CARES Call Center staff) are the only staff who can withdraw these.

### 53.5.5 Work Items Search Results

#### Additional Search Criteria

This section collects additional criteria by which a worker may search. The worker can use these additional criteria in addition to the main criteria options to further narrow his/her search.

- Category - Defaulted to "Any". The dropdown will have the following values.

- Any
- Application
- Discrepancy
- Potential Error
- SMRF

*The table was updated.*

**71.0 Application of the  
ABAWD Policy**

This chapter is new.

**74.0 The FSET Tool**

This chapter is new.

**80.9.2 PIN Select Terminal  
Transaction Support**

The PIN Select Terminal Manual link was updated.