

CARES Archival

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Income Maintenance Advisory Committee (IMAC) Meeting



Agenda

- Background
- High-level benefits and features
- Timeline
- Archival enhancements and new functionality
- CARES Worker Web (CWW) page mockups
- Archival examples

Background

Since 1993, the number of CARES eligibility records stored in the database has grown into the hundreds of millions. Currently, the total count of records stored in the database has achieved a level that will begin to negatively impact overall system performance.

Background, continued

By establishing CARES electronic record management guidelines while considering current Records Retention/Disposition Authorization policies and business needs, the CARES Archival Project will focus on archival best practices that will increase system response times.

This project will help establish a forward-looking approach to handling the growing number of CARES records.

High-Level Benefits

- Improved CWW response time
- Enhanced system performance

High-Level Features

- The most recent record for a case or individual will always be retained.
- Only historical information more than seven years old will be archived.
- Archived data can be requested for retrieval if needed through a new page in CWW.

High-Level Features, continued

- A case's archival status will be displayed on the Case Summary page.
- A restriction will prohibit a worker's ability to run eligibility more than 78 months in the past.
- Key information (e.g., case comments) will not be archived.

Timeline

Production implementation date: June 25, 2016

Phased rollout approach:

- The initial archival process will be rolled out over three months.
- The total number of cases impacted by this effort is estimated to be 1,435,364.
- The archive process will be run weekly once all historical case data has been archived.

CWW Page Mockups

Enhancements and New Functionality

Case Summary—Archived Information

Case Summary Reset			
Summary Information			
Primary Person:	PPLBUDXMHSHE TRAINUZFM SOLQYN 40M PP	W-2 Placed Participant:	
Contact Information			
County of Residence:	51 - RACINE COUNTY	Alternate Address:	XXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
Household Address:	XXXXXXXXXX XXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX LLLLLL LLLLLLLLLLLLLLLLLLLLLLLLLLLLLLLLLLLL	Phone:	XXXXXXXXXXXXX WI 999999999 XXXXXXXXXXXXX
Phone:	LLLLLLLLLLLLLLLLLLLL WI 444444444 XXX-XXX-XXXX		
Office / Worker Information			
Eligibility Office:	MILW CO REG 5 W-2,GOODWILL- EMPLOY SOLUTN (5605)	W-2 Work Program Office:	
County / Tribe:	40 - MILWAUKEE COUNTY	W-2 Geographical Area:	
IM Consortium:	STATE CONSORTIUM	FEP:	
Assigned Worker:	VAMSI KONIJETI (XCTN39)		
Caseload:	3476		
Case Information			
Language:	E - ENGLISH	W-2 Placement:	
Last Review Date:	06/10/2014	Next Review Date:	
Case Closed Date:	05/31/2015	Case Web Status:	WEB
Case Archival Status:	Case has archived information		

Case Summary—No Archived Information

Case Summary Reset			
Summary Information			
Primary Person:	DAVID STARKS 40M PP	W-2 Placed Participant:	
Contact Information			
County of Residence:	51 - RACINE COUNTY	Alternate Address:	XXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX WI 999999999
Household Address:	XXXXXXXXXX XXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXX CASE COPIED ON 2016-04-19 XXXXXXXXXXXXXXXXXXXX WI 999999999	Phone:	XXXXXXXXXX
Phone:	XXX-XXX-XXXX	Phone:	XXXXXXXXXX
Office / Worker Information			
Eligibility Office:	MILW CO REG 5 W-2,GOODWILL-EMPLOY SOLUTN (5605)	W-2 Work Program Office:	
County / Tribe:	40 - MILWAUKEE COUNTY	W-2 Geographical Area:	
IM Consortium:	STATE CONSORTIUM	FEP:	
Assigned Worker:	RAMKAMAL SHOURIE BODDUPALLI (XCTT38)		
Caseload:	3836		
Case Information			
Language:	E - ENGLISH	W-2 Placement:	
Last Review Date:	06/10/2014	Next Review Date:	
Case Closed Date:	05/31/2015	Case Web Status:	WEB
Case Archival Status:	Case does not have any archived information		

Case Summary—Retrieval Request Pending

Case Summary		Reset	
Summary Information			
Primary Person:	PPLBUDXMHSE TRAINUZFMSOLQYN 40M PP	W-2 Placed Participant:	
Contact Information			
County of Residence:	51 - RACINE COUNTY	Alternate Address:	XXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXX XXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXX
Household Address:	XXXXXXXXXX XXX XXXXXXXXXXXXXXXXXXXXXXXXX LLLLLL LLLLLLLLLLLLLLLLLLLLLLLLLLLLLLLLL	Phone:	XXXXXXXXXXXXX WI 999999999 XXXXXXXXXX
Phone:	LLLLLLLLLLLLLLLLL WI 444444444 XXX-XXX-XXXX		
Office / Worker Information			
Eligibility Office:	MILW CO REG 5 W-2,GOODWILL- EMPLOY SOLUTN (5605)	W-2 Work Program Office:	
County / Tribe:	40 - MILWAUKEE COUNTY	W-2 Geographical Area:	
IM Consortium:	STATE CONSORTIUM	FEP:	
Assigned Worker:	VAMSI KONIJETI (XCTN39)		
Caseload:	3476		
Case Information			
Language:	E - ENGLISH	W-2 Placement:	
Last Review Date:	06/10/2014	Next Review Date:	
Case Closed Date:	05/31/2015	Case Web Status:	WEB
Case Archival Status:	Case has archived information; retrieval pending		

Case Summary—Retrieval Request Completed

Case Summary								Reset
Summary Information								
Primary Person:	JAMIE CLEEVER 61F PP			W-2 Placed Participant:				
Contact Information								
County of Residence:	40 - MILWAUKEE COUNTY			Alternate Address:				
Household Address:	2420 N BOOTH LANE ST 111 MILWAUKEE WI 53212			Phone:				
Phone:	608-243-9876			Phone:				
Office / Worker Information								
Eligibility Office:	MILWAUKEE ENROLLMENT SERVICES (5040)			W-2 Work Program Office:				
County / Tribe:	40 - MILWAUKEE COUNTY			W-2 Geographical Area:				
IM Consortium:	STATE CONSORTIUM			FEP:				
Assigned Worker:	COLLEEN NEUENSCHWANDER (XCTE47)			FEP:				
Caseload:	1337			FEP:				
Case Information								
Language:	E - ENGLISH			W-2 Placement:				
Last Review Date:				Next Review Date:		03/31/2000		
Case Closed Date:				Case Web Status:		WEB		
Case Archival Status:	Case has retrieved information which will be retained until 09/30/2016							
Associated RFA Information / ACCESS Application Information								
Number	Agency	Contact Method	RFA Status	Contact Date	ACCESS App	ACP Status	Summary	
No data found.								

Initiate Eligibility Page

Users will see the following error message when trying to run eligibility more than 78 months in the past:

Initiate Eligibility Cancel Reset

The following events have occurred:

- GL344:** You cannot determine eligibility before 11/01/2009 .

Page Completion Status: **All pages are complete, you may proceed to eligibility by clicking the 'Next' button.**

Eligibility Status: **Based on the changes to the case, you should run eligibility.**

What would you like to do?

Run Eligibility Ignore W-2 income and asset tests to allow CMF Placements to begin

Run Eligibility with Date

Effective: / /

Add Case Comment Cancel Previous Next

Archived Case Retrieval Page

The screenshot shows a web application interface for "SYSTEMS". The top right corner displays the version "3.5" and the date "05/03/2016". A navigation menu on the left lists various options, with "Case Comments" checked. The main content area is titled "Archived Case Retrieval" and includes a "Cancel" checkbox and a "Reset" button. Below this is a section for "Requested Cases" containing a form with a "Case:" label and a text input field containing "0127593919". To the right of the input field are "Reset" and "Add" buttons. Below the input field is a table with a header "Case" and two empty columns. A red arrow points to the input field. At the bottom right of the form area is a "Save" button.

SYSTEMS

3.5 05/03/2016

Navigation Menu

- Search
- CARES Home
- Search
- Inbox Search
- Unlinked Documents
- RFA / Case
- Client Registration (0)
- Case Summary
- Case Comments
- Expected Changes
- Application Entry (0)
- Case Information
- Individual Demographics
- Benefits/School
- Individual Non Financial
- Other Health Care

Archived Case Retrieval

Cancel Reset

Requested Cases

Case:

Reset Add

Case		

Save

CWW Page Examples With Archived Information

Employment Summary (Before and After Archival)

Example Employment Summary Page

Employment Summary Cancel Reset

Viewing historical information updated on or before 04/09/2016 Current

Employment

Row	Individual	Begin Month	End Month	Last Updated	Del Rsn	Seq	Employer Name	Emp Begin Date	Monthly MA Gross Amount	Monthly BC+ Taxable Amount	Conv Amount	In-Kind Amount		
	PPLBUDXMHSHE TRAINUZFMSOLQYN 40M PP	05/2015		05/22/2015		3	O&H BAKERY	04/15/2015	\$1.00	\$1.00	\$1.00	\$0.00		
	PPLBUDXMHSHE TRAINUZFMSOLQYN 40M PP	01/2014	01/2014	01/20/2014	AE	2	BURLINGTON COAT FACTORY	07/01/2012	\$0.00	\$0.00	\$0.00	\$0.00		
	PPLBUDXMHSHE TRAINUZFMSOLQYN 40M PP	02/2008	02/2008	07/19/2012	NL	1	PA STAFFING	02/04/2008	\$1.00	\$1.00	\$1.00	\$0.00		

Employment Summary Details Page— Before Archival

Employment Summary Details

Viewing historical information updated on or before 10/10/2020

Employment Summary Details

Individual/Sequence
Individual: **DAVID STARKS 40M PP**
Sequence: **1**

Details

Begin Month	End Month	Last Updated	Del Rsn	Employer Name	Emp Begin Date	Monthly MA Gross Amount	Monthly BC+ Taxable Amount	Converted Amount	In-Kind Amount
02/2008	02/2008	07/19/2012	NL	PA STAFFING	02/04/2008	\$1.00	\$1.00	\$1.00	\$0.00
02/2008		02/18/2008		PA STAFFING	02/04/2008	\$1.00	\$1.00	\$1.00	\$0.00

This information will be archived because it is more than seven years old.

Employment Summary Details Page— After Archival

Employment Summary Details

Viewing historical information updated on or before 04/09/2016

Employment Summary Details

Individual/Sequence

Individual: PPLBUDXMHSHE TRAINUZFM SOLQYN 40M PP

Sequence: 1

Details

Begin Month	End Month	Last Updated	Del Rsn	Employer Name	Emp Begin Date	Monthly MA Gross Amount	Monthly BC+ Taxable Amount	Converted Amount	In-Kind Amount
02/2008	02/2008	07/19/2012	NL	PA STAFFING	02/04/2008	\$1.00	\$1.00	\$1.00	\$0.00

CWW Page Examples With Archived Information

Confirmed Assistance Group Eligibility History (Before
and After Archival)

Confirmed Assistance Group—Before Archival

Confirmed Assistance Group Eligibility History											
Case Information											
Assistance Group: FS - FOODSHARE										Sequence: 1	
Benefit Details Show Invalid											
Benefit Begin Date	Benefit End Date	Date Confirmed	Eligibility Status-Non Financial	Eligibility Status-Asset	Eligibility Status-Income	Benefit Amount	Net Change Amount	Reasons	Updated By	Override	
01/01/2015	01/31/2015	12/18/2014	FAIL	PASS	PASS	\$194.00	\$0.00	554	CARES		🔍
10/01/2014	12/31/2014	09/06/2014	PASS	PASS	PASS	\$194.00	\$0.00		CARES		🔍
08/01/2014	09/30/2014	07/01/2014	PASS	PASS	PASS	\$189.00	\$0.00		XKE528		🔍
07/01/2014	07/31/2014	06/10/2014	PASS	PASS	PASS	\$189.00	\$0.00		XKE018		🔍
03/01/2014	06/30/2014	02/03/2014	PASS	PASS	PASS	\$189.00	\$0.00		XKE261		🔍
02/01/2014	02/28/2014	01/20/2014	PASS	PASS	PASS	\$189.00	\$0.00		XKE872		🔍
01/15/2014	01/31/2014	01/20/2014	PASS	PASS	PASS	\$103.00	\$0.00		XKE872		🔍
09/01/2012	12/31/2013	08/16/2012	FAIL	FAIL	FAIL	\$0.00	\$0.00	142	XKE261		🔍
08/01/2012	08/31/2012	08/16/2012	FAIL	PASS	FAIL	\$200.00	\$0.00	112 613	XKE261		🔍
07/16/2012	07/31/2012	08/16/2012	FAIL	PASS	FAIL	\$103.00	\$0.00	112 613	XKE261		🔍
07/01/2008	06/30/2012	06/17/2008	FAIL	PASS	PEND	\$10.00	\$0.00	554	CARES		🔍
04/01/2008	06/30/2008	02/18/2008	PASS	PASS	PASS	\$10.00	\$0.00		XRA159		🔍
03/01/2008	03/31/2008	02/18/2008	PASS	PASS	PASS	\$10.00	\$0.00		XRA159		🔍
02/01/2008	02/29/2008	02/18/2008	PASS	PASS	PASS	\$10.00	\$0.00		XRA159		🔍
01/14/2008	01/31/2008	02/18/2008	PASS	PASS	FAIL	\$0.00	\$0.00	557	XRA159		🔍

This information will be archived because it is more than seven years old.

Confirmed Assistance Group—After Archival

Confirmed Assistance Group Eligibility History											
Case Information											
Assistance Group: FS - FOODSHARE										Sequence: 1	
Benefit Details											Show Invalid
Benefit Begin Date	Benefit End Date	Date Confirmed	Eligibility Status-Non Financial	Eligibility Status-Asset	Eligibility Status-Income	Benefit Amount	Net Change Amount	Reasons	Updated By	Override	
01/01/2015	01/31/2015	12/18/2014	FAIL	PASS	PASS	\$194.00	\$0.00	554	CARES		
10/01/2014	12/31/2014	09/06/2014	PASS	PASS	PASS	\$194.00	\$0.00		CARES		
08/01/2014	09/30/2014	07/01/2014	PASS	PASS	PASS	\$189.00	\$0.00		XKE528		
07/01/2014	07/31/2014	06/10/2014	PASS	PASS	PASS	\$189.00	\$0.00		XKE018		
03/01/2014	06/30/2014	02/03/2014	PASS	PASS	PASS	\$189.00	\$0.00		XKE261		
02/01/2014	02/28/2014	01/20/2014	PASS	PASS	PASS	\$189.00	\$0.00		XKE872		
01/15/2014	01/31/2014	01/20/2014	PASS	PASS	PASS	\$103.00	\$0.00		XKE872		
09/01/2012	12/31/2013	08/16/2012	FAIL	FAIL	FAIL	\$0.00	\$0.00	142	XKE261		
08/01/2012	08/31/2012	08/16/2012	FAIL	PASS	FAIL	\$200.00	\$0.00	112 613	XKE261		
07/16/2012	07/31/2012	08/16/2012	FAIL	PASS	FAIL	\$103.00	\$0.00	112 613	XKE261		
07/01/2008	06/30/2012	06/17/2008	FAIL	PASS	PEND	\$10.00	\$0.00	554	CARES		

Communication and Training

- DHS training
- Operations memos
- Process Help

Questions
