Systematic Generation of the Case Summary

IMAC Presentation

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Background

Currently, IM workers are responsible for generating the Case Summary, through CWW at application or at renewal, once all verifications are processed and the case is no longer pending. This process can result in QC errors for the following reasons:

- Workers might not generate the summary when it's needed. Verifications are often requested after initial processing for an application or renewal. Later, after the verifications are processed, generating the Case Summary can be missed.

- Workers might generate the summary when it's not needed (i.e., when the case remains pending).

Either way, members may not be properly notified of the current information entered on their cases.

Systematically Generating the Case Summary

On June 24, 2023, CARES will be enhanced to systematically generate the Case Summary after applications and renewals are confirmed.

Two CWW pages will be enhanced to manage the systematic generation:

- Generate Summary – The options for the Signature Type field, and "What Would You Like to Do?" field will be updated. And, there will be more scenarios for a default selection for the "What Would You Like to Do?" field.

- Confirm Eligibility – The system logic will check for a valid signature recorded on the Generate Summary page.

Updates to the Generate Summary Page – Signature Type

Here are the current options for the Signature Type field:

FoodShare/Health Care – Child Care – CTS	W-2
• E – Electronic	• P – Telephonic
• P – Telephonic	• W – Written
• R – Worker Generated PPRF	
• W – Written	

Updates to the Generate Summary Page – Signature Type

After implementation, these will be the options for the Signature Type field:

FoodShare/Health Care – Child Care – CTS	W-2
• E – Electronic	• P – Telephonic
• P – Telephonic	• W – Written Requested
• R – Worker Generated PPRF	• Y – Signature Received
• W – Written Requested	
• X – Written Received	

"Written Requested" – formerly "Written" – means a signature has been requested.

"Written Received" means the applicant or member has provided a signature.

"Signature Received" means the individual has provided a signature.

Updates to the Generate Summary Page – What Would You Like to Do?

Currently, when the Generate Summary page is scheduled, workers are required to select an option in the "What would you like to do?" field.

Right now, workers can choose one of the following options:

- Print Summary

- Mail Summary

- Do not generate summary

Print Summary is the general default option when the worker is processing an application or renewal.

Mail Summary is the default option when the worker selects P – Telephonic as the signature type for a FoodShare/Health Care request or Child Care request.

Updates to the Generate Summary Page – What Would You Like to Do?

After implementation, a new option, **System Determined**, will be added to the "What Would You Like to Do?" Field. It will be the default option when an application or renewal is being processed and any of the following is true:

- The Generate Summary page is scheduled in the driver flow.

- The worker directly navigated to the page.

- The worker clicked **+** on the page to add new information.

Updates to the Generate Summary Page – What Would You Like to Do?

After implementation, **Do not generate summary** will be the default option for the "What Would You Like to Do?" field when no application or renewal is being processed on the case.

Note that a Case Summary will not be automatically generated when processing a Telephonic SMRF (since it is not an application or renewal). A worker would need to select **Mail Summary** if a summary is required.

Update to the Confirm Eligibility Page

The Confirm Eligibility page will be updated to check whether an application or renewal is being confirmed for a requested program and that a valid signature exists. If an application or renewal is processed for more than one program, CARES checks all programs.

Note that if a valid signature does not exist for a requested program and the worker clicks **Next**, a yellow banner message will be displayed asking for the valid signature type to be selected on the Generate Summary page.

Update to the Confirm Eligibility Page

The Case Summary will be generated and automatically sent to the household if the following is true:

- The value of "What would you like to do" on Generate Summary page is either **System Determined** or **Do not generate summary**; and

- FoodShare, health care, caretaker supplement or Wisconsin Shares (or any combination of these programs) are requested and confirmed as part of a single application/renewal, or the W-2 program is confirmed.

* Workers should, as a general practice, leave **System Determined** in place. However, if they do change the value, the Case Summary will still be sent by CWW when required.

Manual Generation of the Case Summary

Workers will continue to use the existing process to manually generate a case summary. They must manually generate and send the Case Summary for the following reasons:

- Member request

- As part of processing Federally Facilitated Market (FFM) referrals

- A telephonic signature can't be processed in CWW, or the applicant or member doesn't want to do the telephonic signature and a signature is needed

- There is a systematic issue with the automated generation of the Case Summary. When this occurs, workers will get an alert to manually generate the Case Summary.

Questions?