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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: Amy Mendel-Clemens, Chief
Technical Assistance and Training Section
Bureau of Enrollment Management
Division of Health Care Access and Accountability

BEM/DFS OPERATIONS MEMO					
No: 09-29		DATE: 5/22/2009			
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+ CORE <input checked="" type="checkbox"/>			
CC	<input type="checkbox"/>	W-2	<input 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			
PRIORITY: HIGH					

SUBJECT: **Application Summary**

CROSS REFERENCE: MEH 2.5.1, FSH 2.1.1, FSH 2.1.3, BCPH 25.5; CTSH 4.4

EFFECTIVE DATE: 6/15/09

PURPOSE:

The purpose of this memo is to announce the availability of a new Application Summary and the policy and procedure that should be followed when using the new Application Summary.

BACKGROUND:

Income Maintenance workers send suggestions to the Bureau of Enrollment Management through the CWW Suggestions under Worker Tools. In the past, we have received suggestions to make the Combined Application Form (CAF) shorter and easier to understand. In response to those suggestions, we have developed a new Application Summary that can be used in place of the printed CAF for BadgerCare Plus, Medicaid and FoodShare (FS) cases.

POLICYFOODSHARE

A summary of the information used to determine eligibility and benefit amount at application or review must be provided to the applicant or member after the application/review has been processed. This is to allow the applicant/member to review the information that has been used in the eligibility determination.

If a valid signature (FSHB 2.1.3) has not been collected prior to a telephone review interview, a signature page along with the summary must be mailed to the member. The review is not complete until the signature page is returned.

If a valid signature has been collected prior to the intake or review interview, the member does not have to return a signature page but the summary of the information must still be given or mailed to the member.

BADGERCARE PLUS AND MEDICAID

When a telephone interview is used to complete an application or review, a summary of the information used to determine eligibility along with a signature page must be mailed to the applicant/member. The application or review is not complete until the signature page is returned.

When an application or review is submitted through an ACCESS or a Mail-in application, the summary does not have to be mailed unless there were changes made to the information provided when processing the application or review. In that situation, the summary must be mailed but an additional signature would not be necessary.

PROCESS CHANGE:CURRENT PROCESS

When a worker is required to send a summary of the information and/or a signature page to collect a signature, a Combined Application Form (CAF), including the Addendum to the CAF, must be printed from the CARES mainframe screen ACCP and either given or mailed to the member. This form is difficult to read and costly to mail.

NEW PROCESS

The Bureau of Enrollment Management has designed an Application Summary that can be used in place of printing the CAF and Addendum. The new Application Summary is easier to read and shorter than the old CAF and Addendum. A cover letter is also available to explain the purpose of the Application Summary with instructions for the customer on signing and returning the Signature Page if a signature is required.

CARES:

A new page, Generate Summary Page has been added to CWW to use with FS, BCP and Medicaid cases. This page will allow the worker to either mail the Application Summary or print it. The worker will also be able to choose what type of signature has been or needs to be collected for the application or review. Cases with Child Care, CTS or W-2 will still have to print the CAF from ACCP.

GENERATE SUMMARY PAGE

This page will come up in both the Intake and Review driver flows before the Initiate Eligibility page. In Intake or Review mode, the worker will have to choose one of the 'What would you like to do' and 'Signature' options to move past the page.

The page will also be scheduled when a program is added or a change to the case has been made that will require the worker to initiate eligibility. In these situations the last entries made on the page will display and the worker will be able to move past the page without updating the entries.

If the worker wants to generate the summary when the fields on the page are not updatable, the 'add new' button will create a new page to use to generate the summary.

The Application Summary will be in English or Spanish, depending on the household language. The summary will be generated as a PDF and will be stored in the Electronic Case File. The View button must be clicked in order to send the summary to the ECF and allow the worker to proceed to the next page. All historic versions of the summary that have been generated will be available in the ECF.

Workers have the following options on this page:

1. Mail Summary (to mail the cover letter, Application Summary and Signature Page to the customer), or
2. Print Summary (to print the Application Summary and Signature Page in the agency to give to the customer for signature after a face to face interview), or
3. No Action (to use when a summary is not required to be given or mailed to the member)

Workers will also specify the type of signature collected for the application on this page:

- Electronic (to use with valid e-signature for the current interview), or
- Written (to use when you are requesting a written signature for the current interview).
- Telephonic (to use with a telephonic signature)

Currently only the 'Telephonic' signature option will send a summary without a signature page and request for the signature page to be returned. Until updates can be made to send a summary, using the 'written' signature option, without a request for a signature, workers should use the 'Telephonic' option when a valid signature has been collected and only the summary should be sent.

GENERATE SUMMARY

ATTACHMENTS:

- [Draft Cover Letter with requesting a signature \(written\)](#)
- [Draft Cover Letter with telephonic signature](#)

CONTACTS:

BEM 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, 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/BEM/AMC/ME