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**State of Wisconsin
Governor Scott Walker**

**TO: W-2 Agencies
Income Maintenance Supervisors
Income Maintenance Lead Workers
Income Maintenance Staff
Workforce Development Boards
Job Center Leads and Managers
Training Staff
Child Care Coordinators**

FROM: Janice Peters, Director
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DFES OPERATIONS MEMO						
No: 12-50						
DATE: 09/21/2012						
FS	<input checked="" type="checkbox"/>	MA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BC+	<input checked="" type="checkbox"/>
SC	<input type="checkbox"/>	CTS	<input type="checkbox"/>		FSET	<input checked="" type="checkbox"/>
CC	<input type="checkbox"/>	W-2	<input checked="" type="checkbox"/>		EA	<input type="checkbox"/>
CF	<input type="checkbox"/>	JAL	<input checked="" type="checkbox"/>		JC	<input type="checkbox"/>
RCA	<input checked="" type="checkbox"/>	RMA	<input checked="" type="checkbox"/>		Other	<input type="checkbox"/> *
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PRIORITY: HIGH						

SUBJECT: Roles of W-2 and Income Maintenance Staff Regarding Data Entry into CARES Worker Web (CWW) and CARES Mainframe

EFFECTIVE DATE: Immediately

PURPOSE

The purpose of this memo is to clarify the roles of local W-2 and Income Maintenance staff in the entry and maintenance of information collected via the CARES Worker Web and the CARES mainframe.

BACKGROUND

Income Maintenance (IM) programs are currently provided through the Department of Health Services (DHS), county social or human service agencies or consortia. Eligibility determination and confirmation for these programs must be completed by merit-based employees, typically Income Maintenance (IM) staff. W-2 program services may be provided by staff employed by county government or private not-for-profit or for-profit agencies.

The W-2 program is delivered via a number of service models. In some agencies, a county IM worker accepts and completes applications, and determines and confirms eligibility for Income Maintenance programs as well as W-2. Then, a private W-2 agency worker provides case management services. In another model, the private W-2 agency determines and confirms eligibility for W-2 and provides the case management services.

The variation in agency type and staff affiliation has contributed to confusion over whether the W-2 worker or the county IM worker is responsible for the entry into and maintenance of data in CWW and the CARES mainframe. Although data entry in CWW and the CARES mainframe has not been limited to the IM staff, the perception that data entry is solely the responsibility of the IM agency has caused confusion over the roles of each type of worker.

ACTION REQUIRED

W-2 and IM agencies must ensure that all staff responsible for the entry of applications, reviews and case changes is aware of the verification and eligibility requirements for the programs they manage. Workers responsible for verification and eligibility who need refresher training in CWW or CARES mainframe must notify their immediate supervisor. Agencies should make training requests to the appropriate training section for assignment of appropriate curriculum.

The W-2 FEP must collect and verify all information relevant to W-2 eligibility and participation including, but not limited to:

- Individual information
- Case information
- Household information
- Household Composition including person adds and pregnancy
- Income (earned and unearned)
- Assets
- Disability
- Other benefits
- School enrollment
- Absent parent information

The W-2 FEP must process and verify eligibility at intake, at review and when any change occurs in the household and/or case. W-2 agency workers, both county W-2 staff and private agency staff, must update fields in CWW that impact eligibility for W-2. They must confirm eligibility for W-2 after changes are entered. Under no circumstance should W-2 staff confirm a result for FoodShare or Medicaid. The W-2 agency is responsible for scanning relevant documents into the Electronic Case File (ECF) and reviewing documents scanned by the IM Centralized Document Processing Unit.

If an IM worker processes a change resulting in a pending status for W-2, the W-2 worker must review the case to ensure accuracy and then must confirm W-2 eligibility. The IM worker must not confirm eligibility for W-2.

The IM worker is responsible for processing, reviewing and confirming eligibility, as well as issuing benefits for all IM programs whether completed in-person, via mail or online through ACCESS. The IM worker must process initial and ongoing certifications, expedited benefits, eligibility reviews and changes.

When a W-2 or IM worker processes a change in CWW that affects eligibility for any program, the worker must record that information on the CWW Case Comments page. The case comments must include a summary of the change(s) including the reason for the change(s). Workers must use CWW rather than the CARES mainframe so that workers from either program can easily locate comments relating to the eligibility change.

In addition to establishing and confirming eligibility, IM and W-2 workers are responsible for the timely disposition of data exchanges including Unemployment Insurance Benefits (UIB), quarterly state wage information collection agency (SWICA) data, and U.S. Social Security Administration (SSA) data.

Federal regulations for the W-2, Child Care, FoodShare, and Medicaid programs require that states verify and take action on the IEVS match reports within a specified time frame. Each agency must complete disposition activity on at least 80% of all match reports within 45 days of the match run date, and the remaining 20% must be acted upon within 90 days. The agency must have a process to monitor those match reports for which verification activity is delayed beyond 45 days after the match run date to ensure that the disposition process is completed for those reports within 90 days following the match run date.

CONTACTS

For Policy Questions in the Balance of State: Bureau of Regional Operations, W-2 Regional Coordinators

For Policy Questions in Milwaukee: Milwaukee Operations Section Regional Administrators

For CARES Processing Questions: W-2 Help Desk

BEPS 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, RCA – Refugee Cash Assistance Program, RMA - Refugee Medical Assistance Program, *Other EP – Other Employment Programs.

DCF/DFES/BWF/GM