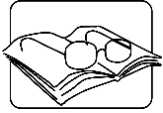# CWW Application Entry
Desk Aid

Purpose:
This desk aid covers processes for entering application information into CARES Worker Web (CWW).

Learning Objectives:
Upon completion of this desk aid, you will be able to:
- Describe the eligibility determination process.
- Define the verification documents for non-financial and financial eligibility.
- Follow the step-by-step processes for entering application information in CWW.
- Establish a case in W-2 Post Eligibility section of CWW.
- Identify issues that may occur during eligibility or confirmation.

Resources

- Request for Assistance (RFA)/Case Processes for W-2 – Desk Aid for instructions on establishing a new RFA in CWW for a W-2 case
  - W-2 Geographical Area Lookup – Desk Aid
- W-2 Eligibility: Troubleshooting in Cares Worker Web (CWW) - Desk Aid
- W-2 Application Entry/Eligibility Determination – Desk Aid
- W-2 Manual 2.7.1 – Providing Social Security Numbers
- W-2 Policy Manual 4.1.2 – Information Requiring Eligibility Verification
- W-2 Policy Manual Chapter 16 – Learnfare
- BWF Operations Memo 10-59: Verification Notice Redesign
- BWF Operations Memo 18-J6: New Social Security Number Application Date Policy and Updates to CWW
- BWF Operations Memo 18-22: Wisconsin Works Nonfinancial Eligibility Verification Policy Updates and Changes to CARES Worker Web
- BWF Operations Memo 19 – J3: Enhancements to Citizenship, Identity, Social Security Number, and Immigration Verification
- BWF Operations Memo 19-08: Enhancements to Citizenship, Identity, Social Security Number, and Immigration Status Verification for Wisconsin Works

Eligibility Determination Model

Determining eligibility for an assistance program is a four-step process.

① The first step is for the FEP to gather **non-financial information**. Non-financial information answers the questions:
  • Who are you?
  • What are your characteristics?
  • What are your responsibilities?

Non-financial eligibility is based upon whether the individual applying for assistance possesses the characteristics that will allow him/her to receive this type of assistance. One of the most common characteristics for many programs is being a citizen or qualified non-citizen. If the individual is not a citizen or qualified non-citizen, then s/he is not eligible to receive assistance.
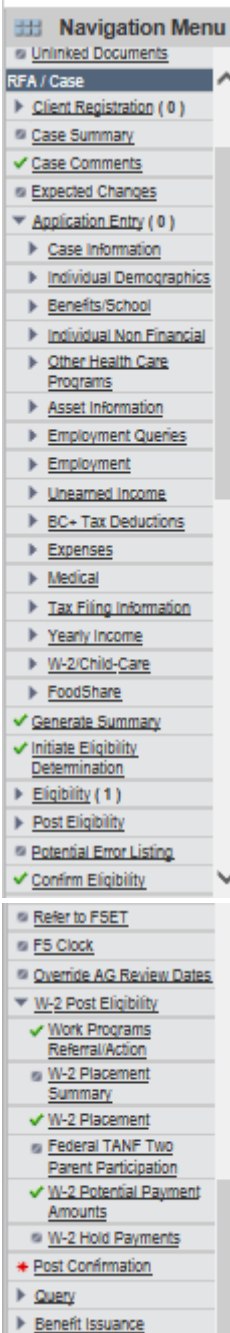
If an individual meets all characteristics, but is not performing the responsibilities mandated by the program, then the individual can be ineligible. Cooperating with the child support agency, providing information to determine eligibility, and being involved in up-front activities are examples of the duties mandated by W-2. If an individual does not meet all the non-financial conditions, then that individual is ineligible to receive the assistance.

② The second step is for the FEP to gather **financial information**. Financial information answers the question, "What do you have?" This includes assets and income. The worker collects information on all assets if applicable to the requested program (e.g., savings accounts, checking accounts, vehicles) and all income (including earned, unearned and self-employment income).

③ The third step is for the FEP to **determine eligibility**. After having gathered all the information, the worker compares the non-financial information to the non-financial requirements of the program, and the financial information to the asset and income limits as established by the program. This comparison determines whether the individual or group is eligible to receive assistance.

④ The final step is for the FEP to **determine W-2 placement**. After a completed informal assessment, determine the most appropriate placement for the W-2 applicant, the placement information is entered.

CARES Worker Web (CWW) Reflects this Model

CWW was designed to follow this model for eligibility determination. During the intake driver flow, CWW pages appear in the following order:

- Non-financial pages
- Financial pages
- Up-Front activities page
- Eligibility determination pages
- W-2 placement pages

Navigation Menu
- 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 Programs
    - ▶ Asset Information
    - ▶ Employment Queries
    - ▶ Employment
    - ▶ Unearned Income
    - ▶ BC+ Tax Deductions
    - ▶ Expenses
    - ▶ Medical
    - ▶ Tax Filing Information
    - ▶ Yearly Income
    - ▶ W-2/Child-Care
    - ▶ FoodShare
  - ✔ Generate Summary
  - ✔ Initiate Eligibility Determination
  - ▶ Eligibility (1)
  - ▶ Post Eligibility
  - ▫ Potential Error Listing
  - ✔ Confirm Eligibility

- ▫ Refer to FSET
- ▫ FS Clock
- ▫ Override AG Review Dates
- ▼ W-2 Post Eligibility
  - ✔ Work Programs Referral/Action
  - ▫ W-2 Placement Summary
  - ✔ W-2 Placement
  - ▫ Federal TANF Two Parent Participation
  - ✔ W-2 Potential Payment Amounts
  - ▫ W-2 Hold Payments
- ✚ Post Confirmation
- ▶ Query
- ▶ Benefit Issuance

Case Information - Information related to case members, program requests, household relationships, address, and referral for assessment

Individual Demographics - Information related to permanent and current demographics

Benefits/School - Information related to benefits received, school enrollment and Learnfare

Individual Non-Financial - Information related to pregnancy, disability, newborns, drug felons, and absent parents

Asset Information - Information related to assets (liquid, vehicle, real property, and personal property)

Employment - Information related to employment, both regular and self-employment

Unearned Income - Information related to unearned income (e.g., child support, SSI/SSDI, veteran's benefits, worker's compensation, etc.)

W-2/Child Care - Information related to up-front activity requirements and W-2 time limits

Generate Summary – View and print, or print a case summary

Initiate Eligibility Determination - Eligibility Determination

Confirm Eligibility - Case Confirmation

W-2 Post Eligibility – Information related to W-2 placement, two parent households, W-2 potential payments and benefit hold

---

Note – CWW pages may vary based on other programs of assistance the case is receiving. This Desk Aid covers the application entry process for an existing FS and MA case with a new W-2 Program Request. The instructions in this Desk Aid begin after the RFA has been established.

RFA Summary

Use the < Begin Intake Interview> button to being the Intake driver flow.

Review Basic Information

Enter a Social Security Number if one has not already been entered, the gender, and date of birth.

- Next, the **Individual/Case Clearance** page should display the individual. Select the matched individual.
- The Merge RFA with Case page displays the new and existing case information. Select Overwrite existing case information or Keep existing case information. If the information matches, there is no selection.

Beginning the Driver Flow

Case Summary

Use the Contact Date to determine the correct Begin Month and Year.

Record the **Begin Month** and **Begin Year**.

- Select <Continue with the Driver/Navigate Through Completed Pages> button in the **Workflow Options** section.
- **Enter Begin Month for New Data** month and year, ensuring that it is the begin month and year for the when the RFA was established.

> **Note:** When entering a Begin Month for New Data date, the date will prepopulate all CWW pages in the driver flow.

W-2 Request

- Ensure that the **Begin Month** and **W-2 Request Date** are the same as the month in which you are processing the case (this is shown at the bottom of the page under **Enter Begin Month for New Data**).
- Ensure that **Yes** is entered for **Requesting this Program/Subprogram of Assistance**?
- If this is a Job Access Loan, Minor Parent, Pregnant Woman, or Non-Custodial Parent case, also enter the **Target Type** (group type) and the **Target Individual** (the individual who is targeted for this assistance type, typically the primary person).
- Enter the **Assigned FEP ID** in the **Financial Employment Planner Information** section.
- Enter the **Subsidized Housing Information** at the bottom of the page. The **Effective Month** will auto populate if the **Begin Month for New Data** date is entered on the **Case Summary** page.
- Select the individual that is being referred to Work Programs under the **W-2 Work Program Referral for Assessment**. If there is a two parent household, each individual must be referred one at a time.
- Once W-2 applicants are referred to Work Programs an informal assessment must be completed to determine if up-front activities are appropriate.

Application/Review Interview Details

Request / Review Date	Program	Mode	*Interview Type	Last Updated
01/16/2013	FS - FOODSHARE	Program Request	F - Face to Face ⌄	01/16/2013
04/10/2013	WW - W-2	Program Request	F - Face to Face ⌄	01/16/2013

From Date MM / DD / YYYY   To Date MM / DD / YYYY Go

- Select the **W-2 Interview Type**. A Face to Face interview is required for W-2.
- If completing a W-2 Review and the W-2 participant is in a CMF, CMF+, or CMU placement the review can be completed over the phone and should select that as the interview type.

Household Members

- Confirm all household members and enter required verification before processing the application.
- Enter **C-Completed Requirements** from the **SSA Verification** drop-down menu so that CWW can run a match with the SSA database to verify the individual's name, SSN, and birth date.
- If the data exchange is successful, the **SSA Verification** field will populate with **V-Verified** after you navigate off the **Household Members** page. Therefore, the individual's birth date and SSN are verified. The default value, **NQ-Not Questionable**, is allowed in the **Birth Date** Verification field.
- If the data exchange is unsuccessful, you will receive an alert and a SOLQ-1 discrepancy will occur. You must resolve the discrepancy following the process described in Operations Memo 17-02. If the birth date is not verified through the data exchange, you must request verification of the birth date and enter the corresponding verification code.
- If an IM worker has entered either **NB-Continuously Eligible Newborn** or **MB-Medicaid Birth Claim** in the **Birth Date** Verification field, you need to do nothing further to verify the individual's birth date.

Verification - *W-2 Policy Manual 4.1.2*
SSN – *Verify only once*
- Data Exchange verifying verbal statement of individual's SSN
- Social Security Card
- Pay stub displaying the Social Security Number
- W-2 Tax Form displaying the Social Security number
- Other reliable documents displaying both the name and SSN

Verification - *W-2 Policy Manual 4.1.2*
Birth Date – *Verify only once*
- Certified copy of Birth Certificate (must be marked "For Administrative Use")
- Data Exchange from the SSA when the SSN verification is V- Verified
- Hospital Birth Record
- Driver's License
- US Passport
- State Issued ID Card
- Certificate of Naturalization
- Certificate of Citizenship
- Native American ID Card or other tribal membership issued by a Federally recognized tribe
- CARES birth query (Wisconsin births only)
- NB code (Continuously Eligible Newborn) entered by IM worker for US Citizenship Verification or US Citizenship MA Verification field
- NX code (Continuously Eligible Newborn) when entered by CARES in US Citizenship Verification field
- Any unexpired immigration document
- Any other reliable document that verifies birth date

Household Relationships

Review relationships.

Verify legal custody of children.

- Confirm the relationships between all household members. The verification field on the **Household Relationships** page will default to **NQ-Not Questionable**. If it is determined a claimed relationship is questionable, enter a Q? to put eligibility into a pending status and request verification (*Operations Memo 10-59*).
- If there is verification of the relationship such as a birth certificate, enter the verification document in the **Verification** field.
- Ensure that **Has Legal Custody of…** responses are correct and verified as needed.

NOTE: If the father is in the household where paternity was established use the FTR relationship code.

Verification - W-2 Policy Manual 4.1.2
- Self-declaration/signature on CAF is acceptable unless contradicted by another source of verification
- KIDS child support disbursement query

General Case Information

Enter the address and determine the **W-2 Geographical Area**.

Verify **Household Composition** if questionable.

Verify out of state TANF receipt if necessary.

- Enter the address. Determine and verify the **W-2 Geographical Area** (see *W-2 Geographical Area Lookup - Desk Aid*).
- Verify the **Household Composition** if it is questionable. Update to a ? or Q? to pend the case until verification is received if the information provided is deemed questionable.
- Enter a response to **Have you resided in WI all your life?** If NO, enter the remaining fields related to residency. If the individual received TANF in another state, TANF receipt must be verified.

Permanent Demographics

Verify
Citizenship
(only once)

Confirm that the entries are correct and verified for all case members.

- If there is not a verified SSN on the **Household Members** page, then the **SSN Application Date** and **Verification** are required.

NOTE: Some qualified non-citizens (see Operations Memo 16-14 and 19-J3) may not have documentation that they have applied for an SSN at the time of W-2 application. **The W-2 Initial Exemption** field and **W-2 Initial Exemption Date** field allow certain W-2 qualified non-citizen applicants to be initially exempt from providing an SSN or proof of having an SSN. FEPs must enter Yes if the applicant meets the conditions to be initially exempt. See Operations Memos 18-J6, and 19-J3 for more information on using the **SSN Override Verification** field.

The applicant or participant has six full calendar months from the date of the SSN application to provide the SSN. The FEP can collect the SSN beginning in the seventh full calendar month and must provide the SSN by the end of the 13th full calendar month after the SSN application date. CWW will prompt the FEP to collect the SSN anytime an intake interview, review, or a program add is completed.

The agency must assist the participant if the participant has met the 6-month mark and has made all reasonable attempts to obtain the information, and cannot close the case if the agency is unable to do so or if the information is not obtained.

***Verification** - W-2 Policy Manual 4.1.2*
- Certified copy of Birth Certificate (must be marked "For Administrative Use")
- U.S. Passport
- Baptismal Certificate that lists a U.S. place of birth
- Religious record that lists a U.S. place of birth
- Hospital Birth Record that lists a U.S. place of birth
- Medical birth record that lists a U.S. place of birth
- CARES birth query (Wisconsin births only)
- Enhanced driver's license
- CARES Birth Query
- Native American ID Card or other tribal membership documentation issued by a Federally recognized tribe
- Citizenship documents issued by the U.S. Department of State to U.S. citizens born abroad
- Certificate of Naturalization (must be marked "For Administrative Use")
- Certificate of Citizenship (must be marked "For Administrative Use")
- SAVE database
- Final adoption decree that lists a U.S. place of birth
- U.S. Citizenship ID card or Northern Mariana card
- DE code when entered by an IM worker in the US Citizenship Verification or US Citizenship MA Verification field.
- NB code when entered by an IM worker in the US Citizenship Verification or US Citizenship MA Verification field.
- NX code when entered by CARES in the US Citizenship Verification field
- DX code (Data Exchange) when CARES obtained identity verification by an automatic data exchange
- MB code (Medicaid Birth Claim) when entered by an IM worker in the US Citizenship Verification or US Citizenship MA Verification fields

---

Current Demographics

Verify identity (only once).

Ensure a correct entry for **Marital Status**.

Verify the primary person's WI residency.

Enter source if YES to **Fleeing Felon or In Violation Of Probation/ Parole**.

- Confirm **Living Arrangement**. This does not need to be verified unless questionable.
- Verify identity for all adults in the W-2 group.

> *Verification* - W-2 Policy Manual 4.1.2
> - Driver's License
> - State Issued ID Card
> - Enhanced driver's license
> - Student ID Card
> - US Government ID Card
> - Military ID Card
> - U.S. Passport
> - Native American ID Card issued by a Federally recognized tribe
> - Any photo ID document issued by USCIS

> - Any unexpired immigration document
> - SAVE database
> - DE code when entered by an IM worker in the Identity Verification or Identity MA Verification field
> - Any other reliable document that verifies identity
> - SC when entered by IM worker
> - DX code (Data Exchange) when CARES obtained identity verification by an automatic data exchange

- Confirm **Marital Status**. Verify only if questionable; otherwise, self-declaration is acceptable (use verification code NQ).

> *Verification - W-2 Policy Manual 4.1.2*
> - Certified copy of Marriage Certificate (must be marked "For Administrative Use")
> - Judgment of Divorce

- Verify WI residency at application and thereafter only if questionable. Verify residency only for the primary person in the W-2 group.

> *Verification - W-2 Policy Manual 4.1.2*
> - Landlord inquiry or current lease
> - Utility bill for water, gas, electricity, or telephone that includes name and address
> - Mortgage receipt
> - Subsidized housing program approval
> - Weatherization program approval
> - Pay check stub including name, address, employer's name, address and phone number
> - Wisconsin Driver's License
> - Wisconsin ID card
> - School registration record
> - Signed statement from a shelter or individual providing temporary residence
> - Wisconsin Motor Vehicle registration
> - Any other reliable document that verifies Wisconsin residency
> **Special Note:** Do not require residence verification for homeless or migrant assistance groups newly arrived to the area.

- If response to **Fleeing Felon Or In Violation of Probation/Parole** is YES, then enter the source of the information.

Benefits Received

Benefits Received [1 of 2]				
Effective Period				
⁎ Begin Month:	01 / 2013	Last Updated:	01/16/2013	
Additional Information				
⁎ Individual:	**ANGIE APPLE 29F PP**			
Has the individual received any of the following benefits?				
⁎ Other State SNAP:	N - No ▼	Verification:	▼ 🗏	
⁎ Tribal Commodities:	N - No ▼	Verification:	▼ 🗏	
⁎ **SSDI Payments:**	No ▼	**Verification:**	▼ 🗏	
⁎ **SSI Payments:**	No ▼	**Verification:**	▼ 🗏	
⁎ SSI Letter:	No ▼	Verification:	▼ 🗏	
⁎ Foster Care/Subsidized Guardianship:	No ▼			
⁑ Foster Care Court Order?:	▼	⁑ Verification:	▼ 🗏	
⁑ QDWI Referral:	No ▼	⁑ Verification:	▼ 🗏	
Obsolete Information				
⁑ Other State AFDC:	▼			
⁑ General Relief:	▼	⁑ Verification:	▼ 🗏	

- Confirm that the entries are correct and verified for all case members.
- Enter a response to the **SSDI Payments** field for all case members. Note that SSI and SSDI should be entered when the applicant/participant begins receiving payments.

School Enrollment

- School enrollment must be verified for all children subject to Learnfare (ages 6-17). **Verification** for **Expected Date of High School Graduation** for Dependent 18 Year Old is required when the parent's eligibility is being determined based on that child.
- **Learnfare Status** must be completed for all children ages 6-17 along with the verification.
- A **Penalty Code** is required when the **Learnfare Status** indicates a penalty applies.

Individual Non-Financial Gatepost

Effective Period	
Last Updated:	04/10/2013

Questions	
▪ Is anyone in your household pregnant?	N - No ▼
▪ Is anyone in your household disabled, blind, or unable to work due to illness or injury?	N - No ▼
▪ Is anyone in your household requesting Long Term Care services?	N - No ▼
▪ Is there anyone in your household who was an SSI recipient in the past who is not an SSI recipient now?	N - No ▼
▪ Is anyone in your household under age 13 months?	N - No ▼
▪ Has anyone in the household applying for FS or W-2 been convicted of a drug felony in the past 5 years?	N - No ▼
▪ Does anyone in your household pay anyone else for room and meals?	N - No ▼
▪ Is there anyone in your household under 21 who was receiving out of home care when s/he turned 18?	N - No ▼

- **Gatepost page** - Enter a response for each question. Any YES response will schedule the related detail page in the driver flow. If there are NO answers to some of the gatepost questions, CWW will not ask for further data about that subject.
    Valid responses are:
        YES, NO, ? = The information provider doesn't know the answer, or the answer is questionable,
        F = The information provider failed to answer the question,
        O = The information provider failed to provide information within 7 days of the request. Entering an O will cause eligibility to fail for CC and W-2, but continue to pend FS and MA for up to 30 days.

Absent Parent

If the Absent Parent is known check the box then complete **Absent Parent Information** and **Absent Parent Address** if known.

- Enter the **Absence Begin Date, Reason for Absence** and **Refer to IV-D** should be YES unless there is a reason not to refer.
- Add the child(ren) to the section **Children of this Absent Parent/If child is Unborn, Enter Child's Mother**. Select YES if Legal Parentage Status has been established, and select NO If Legal Parentage Status has not been established.

Caretaker Relative Cooperation Information

Effective Period

* Begin Month: `02` / `2016`   Last Updated:

Caretaker Relative

* Individual: `CORINNE JENNI 35F PP` [▼]

Child Support Information

* Cooperation: **Yes**   Non-Cooperation Instance Count:

Good Cause Claimed: [▼] [≡]   Good Cause Reason: [▼] [≡]

Good Cause Claim Date: `MM` / `DD` / `YYYY` 📷

Good Cause Approved: [▼] [≡]   Good Cause Result: [▼] [≡]

Medical Support Liability Information

▪ Cooperation: [▼]

▪ Good Cause Claimed: [▼] [≡]   ▪ Good Cause Reason: [▼] [≡]

▪ Good Cause Claim Date: `MM` / `DD` / `YYYY` 📷

▪ Good Cause Granted: [▼] [≡]   ▪ Good Cause Result: [▼] [≡]

◀◀ ◀◀ Enter New Begin Month: `MM` / `YYYY` Go ▶▶ ▶▶

Sequence   Updated on or before

`MM` / `DD` / `YYYY` Go

Add Case Comment   Cancel ☐ ◀ Previous   Next ▶

- Enter the **Caretaker Relative** information.
- Confirm that all information is correct.

Asset Gatepost

⊞ Asset Gatepost   Cancel ☐ [Reset]

Effective Period

Last Updated:	**03/28/2016**

ACP Asset Information

Has the asset information from the latest ACP application PDF been processed?   [▼]

Liquid Asset

Does anyone in your household have any of the following Liquid assets?

★ Cash:	[N - No ▼]	★ Tax Shelter Account:	[N - No ▼]
★ Savings Account:	[N - No ▼]	★ Christmas Club:	[N - No ▼]
★ Savings Certificate:	[N - No ▼]	★ IRA Account:	[N - No ▼]
★ Checking Account:	[N - No ▼]	★ Keogh Plan:	[N - No ▼]
★ Prepaid Debit Card:	[▼]	★ Credit Union:	[N - No ▼]
★ Trust Funds:	[N - No ▼]	★ Tax Refund:	[N - No ▼]
★ Stocks and Bonds:	[N - No ▼]	★ Escrow Account for Home Sale:	[N - No ▼]
▪ EBD Medicaid Annuity:	[▼]	★ Money Owed:	[N - No ▼]
★ US Savings Bond:	[N - No ▼]	▪ Child Support DEFRA Disregard:	[▼]
★ Money Market:	[N - No ▼]	▪ Excess Over Life of Grant:	[▼]
▪ Monthly Excess Over Grant:	[▼]	★ Other:	[N - No ▼]
▪ Special Resource:	[▼]		

- **Gatepost page** - Respond to each type of asset. Any YES response will schedule a detail page.

Liquid Assets

- Enter the individual who owns the asset and the asset type. The verification field will default to NQ-NOT QUESTIONABLE if it does not need to be verified. Otherwise, the asset must be verified using an appropriate source.
- Enter whether the asset is jointly owned (if so, the **Jointly Owned** section of the page must be completed) and whether it is available.
- Enter the asset amount. The verification field will default to NQ-NOT QUESTIONABLE if it does not need to be verified. Otherwise, the asset must be verified using an appropriate source.
- If the W-2 applicant wants his or her W-2 payment to be electronically deposited into his or her account, the **W-2 EFT Information** section must be completed.

Verification - W-2 Policy Manual 4.1.2
- Savings Accounts - Current account statement
- Checking Accounts - Current account statement
- Prepaid Debit Card – Current account statement
- Insurance Policies - Life insurance policy and the insurance company's statement on the policy's current cash value
- Trust Funds - Trust agreement, Court order
- Other Savings or Investments (Certificates of Deposit, Retirement Accounts (including IRA and KEOGH accounts), Stocks or Bonds) - Statement from stockbroker; Copy of bonds; Current bank, credit union or savings and loan statement
- Real Estate - Deeds or titles, Real estate receipts or tax records, Statement of current value from local business

Vehicle Assets

Effective Period

* Begin Month:	01 / 2014
End Month:	MM / YYYY
Last Updated:	
Delete Reason:	

Additional Information

* Individual: KORY LORRY 24F PP (OTX)   Sequence: 0

* Type: AU - AUTOMOBILE   * Verification: DD - DEED/TITLE

* Jointly Owned? N - No   * Available? Y - Yes

Description And Usage

Year: ____   Make: ____

Model: ____   Vehicle ID: ____

▪ Required To Be Registered? ____

License Plate #: ____   State: ____

* Usage: ET - EMPLOYMENT/TRAINING/SCHOOL T

Usage: ____

Usage: ____

* Fair Market Value: $ 3000 . 00 Value Look-Up   * Source: OT - OTHER

Amount Owed: $ ____ . ____   Verification: ____

Equity Value: $ 3000 . 00

- Enter the individual who owns the asset and the asset type with valid verification.
- Enter whether it is jointly owned and whether it is available.
- Enter the usage type.
- Enter the fair market value (from Kelley Blue Book, NADA or another valid source) and the source. Note there are links to vehicle look-up value.

> ***Verification*** *- W-2 Policy Manual 4.1.2*
> - Vehicles (cars, trucks, boats, campers, snowmobiles, and other motorized vehicles) - Car title or registration, Written statement from car dealer, Loan papers or sales receipt, State Division of Motor Vehicles statement

Employment Gatepost

Effective Period

Last Updated: 04/10/2013

Questions

* Is anyone in your household currently employed or on strike or anyone recently been employed (including goods / free rent in return for work (inkind income), OJT, etc)? — **Y - Yes**

* Has anyone in your household recently refused employment or lost employment (FoodShare)? — [ ]

* Is anyone in your household currently self-employed, (such as farming, babysitting, etc) or has anyone had self-employment in the last 4 months? — N - No

* Does anyone have impairment related work expenses? — [ ]

* Does anyone in your household receive money for room and / or meals? — N - No

* Has anyone in the household been previously sanctioned for FoodShare Employment and Training (FSET) and now requesting FoodShare benefits? — [ ]

* Has anyone failed to cooperate with a W-2 agency, refused / quit a job or refused to apply for other benefits (W-2)? — N - No

- Review the current responses for accuracy.
- Enter a response to **Has anyone failed to cooperate with a W-2 agency, refused/quit a job or refused to apply for other benefits (W-2)?**

Employment

Employment Information

Effective Period

* **Begin Month:** 04 / 2013   End Month: MM / YYYY   Last Updated: 04/10/2013

Delete Reason: [▼]

Employer Information

* **Individual:** ANGIE APPLE 29F PP   Sequence: 1

SSN: 321541257

WI Employer Number: [ ]   FEIN: [ ] 🔍

* **Employer Name:** ABC

Address: [ ]

City: [ ]   State: [▼]

ZIP: [ ] - [ ]   Phone: [ ] [ ] [ ]

Fax: [ ] [ ] [ ]

Employment Description

* **Employee Type:** PE - Permanent ▼   * **Job Title for Health Insurance:** ST - Staff ▼

* **Employment Type:** R - REGULAR EMPLOYMENT ▼   * **Verification:** NQ - NOT QUESTIONABLE ▼

* **Begin Date:** 03 / 31 / 2013 📅   * **Verification:** CK - CHECK OR CANCELLED CHECK ▼

First Pay Check Date: MM / DD / YYYY 📅

* **Employment Ended?** No ▼

Employment End Date: MM / DD / YYYY 📅   Verification: [▼]

Date Of Last Paycheck: MM / DD / YYYY 📅   Verification: [▼]

Strike Information

* **On Strike?** [▼]

Strike Begin Date: MM / DD / YYYY 📅   Verification: [▼]

Strike End Date: MM / DD / YYYY 📅   Verification: [▼]

BadgerCare Verifications

* **Wage Verified?** ? - Unknown ▼   Date: MM / DD / YYYY 📅

* **Health Insurance Verified?** ? - Unknown ▼   Date: MM / DD / YYYY 📅

Employer Verification Form (EVF) Information

* **Employer Signature on EVF-Earning:** S - System ▼

* **Employer Signature on EVF-Health Insurance:** S - System ▼

Employer Refused Signature on Either Form: [▼]

Detailed Wage Information

Pay Frequency

* **Pay Frequency:** B - BI-WEEKLY ▼

Detailed Wage Information

Rate Per Hour: $ [ ] . [ ]   Wage Type: [▼]

Average Hours Per Pay Period: [ ]   Verification: [▼]

Total Amount Per Pay Period: $ [ ] . [ ]   Delete: ☐

[Reset] [Add]

Rate Per Hour	Wage Type	Average Hours Per Pay Period	Verification	Total Amount Per Pay Period	Delete	
8.50	REG - REGULAR PAY	20.00	AF - AGENCY FORM	170.00		✏ 🗑

Enter all available information regarding the employer.

Enter all available employment description details.

Enter **Strike Information**.

Enter all available details related to pay/wages.

Enter comments related to how the wages were prospectively budgeted.

If this is an MA case, verify with the EVHI database.

- Enter the individual who is employed and the employer name with any additional information that is available. Also enter the **FEIN** if it is available.
- Enter the **Employee Type** and **Job Title for Health Insurance**.
- Enter the **Employment Type** and **Verification** if necessary (for regular employment, it will default to NQ-NOT QUESTIONABLE).
- Enter the **Employment Begin Date** and **Verification**. Enter whether the **Employment Ended**.
- Enter whether the individual is **On Strike**.
- Calculate the **Wage Information**. Enter the **Pay Frequency**.
- Enter all relevant information in the **Detailed Wage Information** section.
- Click <Add> to calculate the prospective budget. If there are any changes, then click <Update> to recalculate the wage information.

> *Verification - W-2 Policy Manual 4.1.2*
> - Paycheck stubs
> - Equifax
> - Letter from employer stating earnings
> - Self-employment business tax records
> - Self-employment Income Report (DWSP-2131)
> - CARES data exchange/UI query
> - Any other document that verifies earned income

- Enter **Comments** related to how the wages were calculated and verified.
- Click the <Verify> button under **EVHI Database Verification/Query**. Use this to initiate the data exchange to verify the employment health insurance. Review the results.

Unearned Income Gatepost

Effective Period

Last Updated:	01/22/2014

Unearned Income

Does anyone in your household receive income from any of these sources?

* AA - Adoption Assistance:	N - No	* AN - Annuities:	N - No
* CH - Charitable Contributions:	N - No	* CS - Child Support / Maintenance / Alimony:	N - No
* DI - Sick / Disability Benefits:	N - No	* DV - Dividends:	N - No
* FO - Foster Care:	N - No	* GR - General Relief:	N - No
* IN - Interest:	N - No	* KC - Kinship Care:	N - No
* MA - Military Allotment:	N - No	MN - Maintenance / Alimony:	**N - No**
* MO - Money From Other Person:	N - No	* NA - National Refugee Relief:	N - No
* OT - Other:	N - No	* PA - Assistance In Another State:	N - No
* PC - Personal Capital Gains:	N - No	* PE - Other Pension / Retirement:	N - No
* PS - Payments From Property Sold:	N - No	RE - RNIP:	**N - No**
* RR - Railroad Retirement:	N - No	* SI - Supplemental Security Income:	N - No
* SS - Social Security:	N - No	* TC - Tribal Per Capita Income:	N - No
* TR - Trust Fund:	N - No	* TT - Tribal TANF:	N - No
* UN - Unemployment Insurance:	N - No	* VE - Veteran Benefits:	N - No
* WC - Workers Compensation:	N - No		

Educational Aid

* Does anyone in your household receive educational aid?	N - No

- Review the responses to each type of unearned income. Update as necessary.

Unearned Income

- Select the **Individual** and the **Income Type** and enter **Verification**.
- Enter the **Income Begin Date** and whether the **Income Discontinued**.
- Ensure that **Frequency Period** and **Income Available** are correct.
- Enter the **Gross Income Amount** and **Verification**. Click <Add>.
- Enter **Comments** related to how the income was calculated and verified.
- Click <Calculate> to populate the **Monthly Converted Amount** and **Monthly MA Amount**.

NOTE: An SSI payment for a dependent child is not counted as unearned income. FEPs should enter the SSI amount for the dependent child and CWW will not calculate the amount towards the Assistance Groups financial eligibility. See Operations Memo 17-01.

Verification - *W-2 Policy Manual 4.1.2*
- Social Security Award Letter
- Child Support Order
- Unemployment Compensation Award Letter
- Divorce paperwork identifying a financial settlement
- Documentation of Court Awarded compensation
- Compensation Award Letter
- Veteran's Administration Award Letter
- CARES data exchange
- Any other documents that verifies unearned income

W-2 Up-Front Activity Requirements

- Enter the **Begin Month** using the same begin month as the W-2 Request.
- Enter the **FEP Interview Date**.
- Enter a response to the question **Are there any up-front activity requirements?** If YES, then enter a response to **Have the up-front activity requirements been met?** If the W-2 applicant was not referred to Work Programs on the **W-2 Request** page then a YES will not be able to be entered. Go back to the **W-2 Request** page and refer the W-2 applicant to Work Programs.

Generate Summary

- View the application summary and ensure accuracy on all entries.
- **Print Summary** and have applicant/participant review the accuracy of his/her information.

Initiate Eligibility

- Click the <Run Eligibility> button.
  - o Refer to the W-2 Eligibility: Troubleshooting in Cares Worker Web (CWW) course in Learning Center for further information on running eligibility.
- If ignoring assets and income when running eligibility, click on **Ignore income and asset tests to allow CMF Placement to begin**.

Eligibility Run Results

- Ensure that W-2 is passing.

Assistance Group Composition Details

- Ensure that the W-2 group composition is correct and as expected.

Eligibility Summary

- Ensure that W-2 is passing.

Confirm Eligibility

- Confirm W-2 if the eligibility result is correct.

W-2 Budget

- If income and asset tests were ignored to allow for a CMF placement this page will show **Income/Asset Test Skipped** as Yes

W-2 Post Eligibility

Work Programs Referral/Action

The Work Programs Referral Information section lists all W-2 participants who have:
- A confirmed W-2 Participation Status of "Primary Person or in WWM," and
- A confirmed W-2 Participation Status of "Eligible Child."

The Learnfare Referral Information section lists all children who have:
- A confirmed W-2 Participation Status of "Eligible Child" ages 6 - 17,
- A Learnfare status that is <u>not</u> WST (WST – STUDENT IN GOOD STANDING),
- A High School Graduation Status that is NOT-NOT GRADUATED, and
- A parent in a paid placement.

Children that do not meet all of these criteria are listed as E-EXEMPT.

The **Send Referral** column displays information or actions related to the referral of the W-2 applicant.

W-2 Placement

- Select the **Individual** that will be placed into the W-2 placement.
- Select the appropriate **Placement** for the individual.
- Enter the **Placement Begin Date** then click **Add**.
- Enter comments to justify placement using the **Add Work Programs PIN Comment** button.

Placement options, in the drop-down menu, include only those placement types for which a W-2 applicant or participant is eligible based on the W-2 Target Type. If the income and assets determination was overridden in eligibility determination, then CMF is the only placement option.

If there is a two parent household, the FEP will need to determine through an informal assessment which parent is the most appropriate parent for placement.

The **Check for Non-CMF Placement Eligibility** button is enabled only when any of the current or future month(s) eligibility was overridden for CMF purposes. Clicking this button will disregard the current CMF placement, cause CWW not to override the eligibility result (i.e., include income and assets in the eligibility determination), and schedule the **Initiate Eligibility** page.

W-2 Potential Payment Amounts

- **W-2 Potential Payment Amounts** page displays W-2 payment amounts that are calculated but not issued.

W-2 Two Parent Household Participation

The FEP **must** answer the first two questions on the page. The responses will generate results at the bottom of the page. Results determined are:

- **Two Parent Household Result** – Displays as YES when:
  - There are two Eligible Adult (EA) parents with a child in common in the W-2 assistance group (AG), and
  - There are no disabled parents for W-2 who are eligible in the W-2 AG, and
  - Neither parent is caring for a disabled child in the W-2 AG, and
  - One parent is in a paid placement.
- **Is Child Care Authorized?** – Displays as YES when child care is authorized for this case based on child care entries in CWW.
- **Weekly Required Family Participation Hours** – This number is calculated based on the two parent household participation requirements.
- **Informational message will show if a parent or child is disabled**. FEPs need to make sure they meet the requirements for W-2.

Issues that May Occur During Eligibility and Confirmation

Verification

Request verification as needed for any new or updated information, and enter the needed verification codes. To pend W-2 eligibility, use the PN code in the VR field, not a ? This will pend only W-2/CC eligibility and not impact any IM programs. If the W-2 participant fails to submit the requested verification, enter the FN code instead of NV. This will cause W-2/CC eligibility to fail without impacting IM programs (*see Operations Memo 10-59 for more information*).

9 Month Live Error

If you receive the error **Cannot run for more than 9 months live**, you will need to change the **Begin Month** and **Filing Date** on all **Program Request** pages. This will have no impact on the eligibility for IM programs, but eligibility cannot be run until these are updated. This may happen at initial application or when changes such as a person add are made to an ongoing case.

Confirmation on Mixed IM/W-2 Cases

If the case is a mixed case (IM and W-2) and the IM worker runs and confirms eligibility (on either a new application or an ongoing case), an alert will be sent to the W-2 worker. The W-2 case should be confirmed the same day as the other program(s), when appropriate. If W-2 is not confirmed on the same day, then confirm that all CWW entries are correct, initiate and confirm eligibility.

The opposite is also true. If the W-2 worker confirms a new application or a change, then an alert is sent to the IM worker. The IM worker should confirm the same day. If the IM program(s) are not confirmed, then eligibility will need to be run again and confirmed.