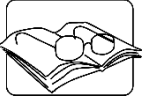


Request for Assistance (RFA)/Case Processes for W-2 – Desk Aid

Assumptions

This desk aid is for the use of W-2 workers who already know the Client Registration and Clearance processes.



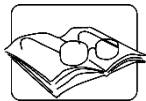
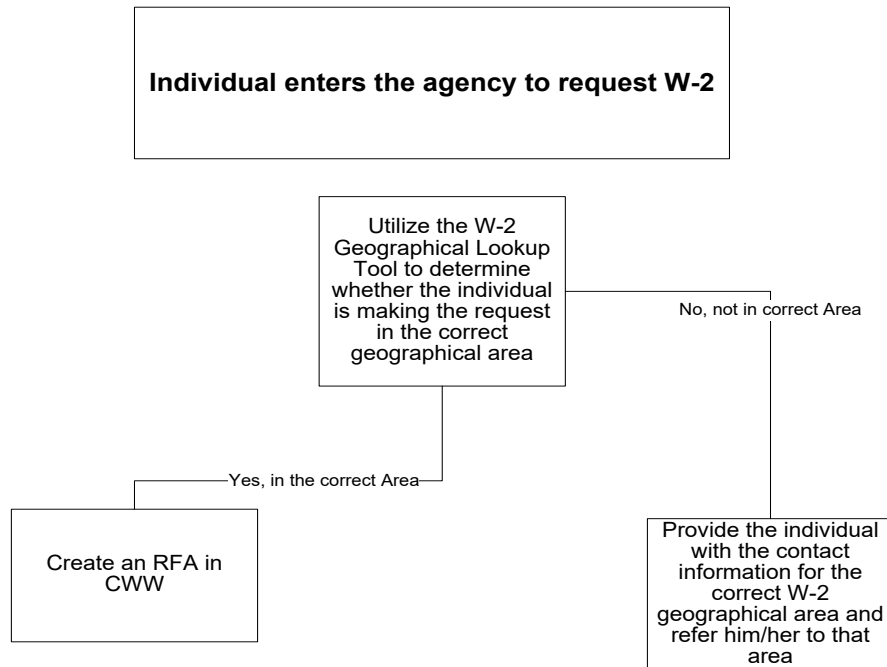
Refer to the Client Registration for W-2 course found in the Learning Center in the Training Catalog for information on the Client Registration process.

For assistance with Clearance in CWW follow the points below to find the information in CWW System Help.

- Access CWW System Help and review the available descriptions for the Clearance process under Client Registration → Potential Individual Matches.
- Access CWW Process Help → Case Processing → Intake → 2.4 Clearance/Master Customer Index.

Creating a Request for Assistance (RFA)

Below is a diagram of the process flow for creating a new W-2 RFA.



Refer to the Desk Aid - W-2 Geographical Lookup found in the Learning Center under “Desk Aids” in the Training Catalog for more information on the first step in this process.

Processing a Request for W-2

W-2 workers should create a new RFA for the individual requesting W-2 services. Follow the steps below to create a new RFA.

1. Access CWW
2. Click on Client Registration tab under the Navigation Menu.
3. Complete the **Basic Information** page.
4. After completing the **Basic Information** page, click Next to display the **Potential Individual Matches** page.
5. Select Create a New RFA. Click Next.
6. Complete the **Additional Information** page. Click Next.
7. Select YES from the drop-down menu for W-2 on the **Program Requests** page. Click Next.

8. On the **Print Application Registration** page, select the View button in order to view and print the application for the applicant's signature. After printing the application, click Next.
9. Complete the **Complete Request for Assistance** page. Click Next.
10. Enter RFA Comments. Click Next.
11. The final step is the **RFA Summary** page which is just a quick overview of what you completed for Client Registration.

Intake Interview with Applicant

When the applicant attends the intake interview, the W-2 worker will start the intake driver flow by following the steps outlined below. Remember: if an applicant has an existing case you must merge the case with the RFA that was created.

1. Begin the Intake driver flow on the **RFA Summary** page by selecting Begin intake Interview. Click Next.
2. On the **Review Basic Information** page, enter a Social Security Number (if one has not already been entered), the gender and date of birth. Click Next.
3. The **Individual/Case Clearance** page should display the individual. Select the matched individual. Click Next.
4. 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. Click Next.
5. On the **Case Summary** page, select Continue with Driver/Navigate through Completed Pages. Click Next.
6. On the **W-2 Request** page, confirm the W-2 Request is YES. Create a Work Programs referral. Click Next.
7. Enter Case Comments. Click Next.
8. . Navigate to WWP.
9. Complete enrollment in WWP on the **Participant Summary** page.
10. Complete a new initial informal assessment in WWP by selecting **Informal Assessment** under the Case Management navigation toolbar.

Note: If a participant's case has been closed due to lack of a W-2 Review the W-2 worker must create a new RFA, and later merge the RFA to the existing closed case.

Applicant Does Not Attend Intake Interview

If the applicant does not attend the intake interview, the W-2 worker should follow the process outlined below.

1. Access CWW.
2. Go to the **Complete Request for Assistance** page.
3. Select YES for the Withdraw RFA? question.
4. Use the drop-down arrow to select the **Withdraw Reason** code NOS – NO SHOW FOR W-2 INTAKE APPT.
5. Click Next.
6. Enter comments on the **RFA Comments** page regarding why the request for assistance has been withdrawn.
7. The **RFA Summary** page will display.

User ID: XCTV59 User Name: J KAHL Quick Select: CASE/RFA Help Logout

Primary Person: W-2 NO SHOW 22F PP RFA: 5150891452 Status: Pending 3.5 11/03/2017

Complete Request for Assistance

Cancel ☐ Reset

RFA Dates

Contact Date: 01 / 03 / 2017

Registration Filing Date: 01 / 03 / 2017

Program Filing Dates

☒ Make all blank Program Filing dates the same as Registration filing date

Health Care (Including Medicare Premium Assistance):	Not Requested
Family Planning Waiver:	Not Requested
Caretaker Supplement:	Not Requested
FoodShare:	Not Requested
Child Care:	Not Requested
W-2:	01 / 03 / 2017

Extension

Extension Date: MM / DD / YYYY Extension Reason:

Withdraw

Withdraw RFA? No

Withdraw Reason:

AGY - AGENCY ERROR
CWD - CLIENT WITHDREW
DPA - DUPLICATE APPLICATION
EXT - EXTENSION EXPIRED
NOS - NO SHOW FOR W-2 INTAKE APPT
P30 - RFA PENDING FOR OVER 30 DAYS
RWD - PP IN ACTIVE CAPO CASE

Next

A notice will be sent to the applicant informing him or her that they failed to show for the intake interview.

Note: If a W-2 worker did not create a new RFA for the applicant and the applicant fails to show for the intake interview; the W-2 worker will be required to go through the entire driver flow to close the W-2 program add request.

Conclusion

Remember W-2 workers must create an RFA for all applicants requesting W-2. If the applicant shows for the intake interview, merge the RFA with an existing case. If the applicant fails to show for the intake interview complete the withdraw information on the **Complete Request for Assistance** page.