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TO: **Economic Support Supervisors
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W-2 Agencies
Workforce Development Boards**

FROM: Amy Mendel-Clemens
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BHCE/BWP OPERATIONS MEMO

No.: 03-79

Date: 12/29/2003

Non W-2 W-2 CC

PRIORITY: HIGH

SUBJECT: **WORKFORCE ATTACHMENT AND ADVANCEMENT (WAA) PROGRAM**

EFFECTIVE DATE: January 1, 2004

PURPOSE

The purpose of this memo is to provide direction on the ending of the WAA program and its impact on WAA participants.

BACKGROUND

The Workforce Attachment and Advancement (WAA) Program was created in 1999. Funding for the program was provided in the 1999-2001 and 2001-2003 biennial budgets. No new funding for the 2003-2005 biennium was provided in 2003 Wisconsin Act 33, the biennial budget act.

Current WAA contracts run through December 31, 2003. Wisconsin Works (W-2) agencies and Workforce Development Boards (WDBs) can continue to serve WAA participants and incur expenses through December 31, 2003.

POLICY

With the WAA program ending, W-2 agencies and WDBs should take appropriate steps to close WAA participation in CARES. For those individuals who are co-enrolled in WAA and another work program, i.e., Wisconsin Works (W-2), Children First, Food Stamp Employment

and Training (FSET), Welfare to Work or Workforce Investment Act (WIA), only the WAA program should be closed in CARES

NOTE ➤ If individuals are co-enrolled in WIA, WDBs should close out WAA services reported in ASSET).

The following CARES instructions provide a step-by-step process by which WAA individuals can be closed out of CARES.

CARES INSTRUCTIONS

Local agencies are responsible for completing all CARES reporting for services provided in WAA, as well as closing out all WAA program records. These records must be closed out as of December 31 or earlier, although backdated reporting in CARES can be done through January. In summary this includes:

- Cease referral of new WAA cases in CARES. The WA type of RFA will be discontinued in CARES effective December 31.
- Retrieve listing of open WAA cases using WPFN - these will all have to be closed in WAA in CARES.
- Complete all WAA activities on WPCS.
- Complete information on WPWA
- Complete WAA program participation on WPWI.
- Complete disenrollment on WPDS if the individual is only open in WAA.

NOTE ➤ If it is necessary to back-date the dates on closing out a WAA activity on WPCS or entering the WAA completion date on WPWI, workers will have the ability to do that. The latest date that should be used in back-dating is 12-31-2003, to coincide with the WAA program closure date. Workers must complete closing out WAA individuals by the end of January 2004. This will ensure that all WAA activity is reported prior to the production of the final 2003 year-end reports.

The following detailed instructions will explain how to complete the above steps.

IDENTIFY OPEN WAA CASES

WAA Workers will first need to identify their caseload of WAA individuals. This can be accomplished by using the search screen WPFN.

On WPFN, a worker should enter the WP office number(s) in which WAA individuals might be open. WAA individuals could be open in one of two WP offices in a given county, the W2 WP office, which begins with either a "0" or "1", or the FSET office which begins with a "2". Workers should check both WP office types in searching for WAA individuals. One way to search both offices at once is to use the county number rather than a specific office number. It may be helpful to search for counts in each office initially. Also plan on searching WPFN several times to catch any updates or additions that occur after the batch date of the WPFN data (See UPDATED ON Date on WPFN).

The exception to this rule is Milwaukee County, which is divided into six regions. Workers in Milwaukee should search by the office number associated with their region. For instance, workers in Region 1 should search office 1571 (the W2 WP office for region 1) and office 2571 (the FSET WP office for region 1.)

Below is an example of searching for WAA individuals using the W2 WP office number for region 1 in Milwaukee. This sample search uses a case manager ID xct266 to narrow the search to a particular work programs case manager's portion of the caseload. An "O" for "open" must be placed next to the WA IND field to pull up open WAA individuals:

```

WPFN                                REQUEST TO "FIND" INFORMATION                12/16/03 11:27
                                (FIXED "AND" SEARCH CRITERIA)            XCT266 K CLOUGH
SPECIFY THE TYPE TO BE LISTED BASED ON ANY OF THE FOLLOWING:-
STATE/COUNTY:  _ OFFICE: 1571 WDA:  _ PROGRAM:  _ WP REG:  _ IM REG:  _
CASE MGR ID: XCT266 ESS:  _ ZIP:  _ REG NO:  _ CENSUS:  _
LANG CD:  _ EDU:  _ REFERRAL DATE:  _ THRU  _ SUB PGM:  _
EARNED INCOME:  _ DATE OF BIRTH:  _ THRU  _ SEX:  _
VEHICLE AVAILABLE:  _ D.L:  _ TYPE:  _ DISABILITY:  _ JRI:  _ E/SC COD:  _
OPEN EP:  _ RFGE:  _ VTRN:  _ TRBL MBR:  _ W2 SLOT:  _ ABAWD:  _ GRAD STS:  _
LF STATUS:  _ LAST CONTACT:  _ THRU  _ SYS STAT:  _
CF:  _ 2PAR:  _ HISP/LAT:  _ AMR IN/AK:  _ ASIAN:  _ BLK:  _ HI/PAC:  _ WHITE:  _
**WT SPECIFIC WT IND:  _ TGT POP:  _ WT TYPE INDIV:  _ RECIP 30:  _
*WT PGM TYPE:  _ STAND ALONE TR:  _ PRS CONT:  _
WA IND: O WA PGM TRK:  _ WA TYPE INDIV:  _
COMPONENT CD:  _ COMPONENT BEGIN DATE:  _ THRU  _
PHASE:  _ DOT:  _ COMPONENT ANT END DATE:  _ THRU  _
STAFF ID:  _ PROV ID:  _ FUND SRCE:  _ SCH HOURS:  _ THRU  _
EMP PROV ID:  _ SITE ID:  _ DISP CD:  _ ACT CD:  _
-----
DO YOU WANT TO INCLUDE "OR" SEARCH CRITERIA ? : N
Total Individuals meeting the Search criteria : 30
PF14 WPML
NEXT TRAN:  _ PARS:  _
    
```

Once a match is made on WPFN, workers can press PF14 to access WPML, which provides a listing of the individuals meeting the search criteria. An example of WPML is shown below:

```

WPML                                MATCHED LISTING                12/16/03 11:43
                                XCT266 K CLOUGH
TOTAL INDIVIDUALS MATCHING THE SEARCH CRITERIA: 30
OFFICE: 1571

```

CO	OFF	CASE MGR ID	LAST NAME	PIN	REG	SUB CD	PGM
_	40	1571 XCT266	COOPER	G 91005xxxxx			V
_	40	1571 XCT266	HARRISON	H 01004xxxxx			V
_	40	1571 XCT266	IDS	W 71005xxxxx			M
_	40	1571 XCT266	JANSEN	K 01004xxxxx			V
_	40	1571 XCT266	LESTER	M 71005xxxxx	xx	xxxx	V
_	40	1571 XCT266	PEARLMAN	L 51005xxxxx	xx	xxxx	V
_	40	1571 XCT266	SMALLS	L 81004xxxxx	xx	xxxx	V
_	40	1571 XCT266	SPANTEST	H 11005xxxxx	xx	xxxx	M
_	40	1571 XCT266	YATES	J 91005xxxxx	xx	xxxx	V
_	40	1571 XCT266	TESTAGAIN	H 91005xxxxx	xx	xxxx	M
_	40	1571 XCT266	BRADY	K 31004xxxxx	xx	xxxx	V

```

PF13 WPFN                                UPDATED ON: 12 12 03                PAGE: 0001 OF 0003
NEXT TRAN:  _ PARS:  _                                MORE...
    
```

Once the population of WAA individuals has been identified for a specific office and worker, workers are now ready to close them out on a one-by-one basis. Keep in mind that there may be cases assigned to other workers, maybe ones no longer in the agency. All WAA cases must be closed, regardless of the worker assignment.

COMPLETE ACTIVITY REPORTING ON WPCS/WPCH

The first step of this process is to check to see if there are any WAA specific components open for the individual on screen WPCH. A WAA specific component is one that is funded entirely by the WAA program and should have the WAFL fund source code listed as the component's fund source.

Workers should be careful not to close out a component that might be shared by the WAA program and another program, such as W2 or FSET. Doing so could affect the other program's performance measures. Shared activities must be discussed locally among the programs to determine if they will continue without WAA funding. CARES should be updated to reflect any necessary changes.

Those components identified as being WAA only should be closed out prior to completing the WAA episode. Closing a component on WPCH requires placing a C in the field above the component and hitting ENTER, as shown below:

WPCH		COMPONENT/STATUS HISTORY		12/17/03 14:58	
				XCTA28 K CLOUGH	
PIN:	REGION: 0005	OFFICE: 1575			
NAME: WTWREG	TEST			COUNTY/TRIBAL UNIT: 40	
				CASE MANAGER: XCT266	
TYPE OF ACTION:	C	-	-	-	-
OFFICE/REGION:	1575 0005	1575 0005	1571 0001		
COMPONENT/STATUS:	EMP SEARCH	ENR W/ORIENT	ENR W/ORIENT		
PHASE/SANC IND:	A N	A	A		
BEGIN DATE:	12 17 03	12 17 03	11 01 01		
STAFF/PROVIDER ID:	XCT266 0001	XCT266 0001	XCT266 0001		
SCH HRS: WKY/DLY:	20 04				
FREQ: DAYS PER MM:	20				
FUNDING SOURCE:	WAFL				
EMP PRV ID:					
SITE ID/DOT:					
NON-APPROVAL CD:					
ANTIC END DATE:	12 31 03				
COMPLETION CODE:					
ACTUAL END DATE:		12 17 03	11 01 01		
				PAGE:	1
NEXT TRAN: _____	PARMS: 6100512483_____				

This will return the WPCS screen. The worker should enter the appropriate component end date, using a date not greater than 12-31-2003, and enter an appropriate component completion code. If the reason the component is ending is due the sun-setting of the WAA program, we recommend using the completion code "B", which will indicate the component was "Interrupted". If, however, the component ended for another reason, then use the appropriate code. An example of ending a component with "B" is shown below:

```

WPCS                CREATE/UPDATE COMPONENT/STATUS                12/17/03 15:00
                                                                XCTA28 K CLOUGH
PIN:                REGION: 0005                OFFICE: 1575
NAME: WTWREG        TEST                        COUNTY/TRIBAL UNIT: 40

TYPE OF ACTION: C (A-ADD U-UPDATE C-COMplete D-DELETE)
COMPONENT/STATUS: ES EMP SEARCH
PHASE: A           (P-PENDING S-SCHEDULED A-ACTUAL)
BEGIN DATE: 12 17 2003
STAFF ID: XCT266
PROVIDER ID: 0001
WEEKLY SCHEDULED HOURS: 20    W-2 SANC IND (Y/N): N
DAILY SCHEDULED HOURS: 04    FREQUENCY (DAYS PER MONTH): 20
FUNDING SOURCE: WAFL__
EMPLOYER PROVIDER ID: _____
SITE ID: _____
DOT: _____
NON-APPROVAL CODE: _____
ANTICIPATED END DATE: 12 31 2003
COMPLETION CODE: B
ACTUAL END DATE: 12 17 2003
PF13 WPSC PF14 POST ANOTHER COMPONENT
NEXT TRAN: _____ PARS: 3_____
    
```

Once the Completion code and Actual End Date have been entered, press ENTER and the component will be closed.

COMPLETE PROGRAM INFORMATION ON WPWA

The screen that is used to post the actual Program Completion from WAA is WPWI. But before a WAA individual can be completed on WPWI, the WAA worker must complete some information on screen WPWA.

On WPWA, the worker must indicate whether the WAA individual is employed at exit and if so, how much income the individual is making from the employment.

These two fields are highlighted below:

```

WPWA                UPDATE WP-WA CLIENT INFORMATION                12/17/03 15:01
                                                                XCTA28 K CLOUGH
PIN: 6100512483    WDA: 2    CTY/TRIBE: 40    OFFICE: 1575
NAME: TEST        WTWREG
CURRENT DETERMINATION X CUSTODIAL PARENT    NON CUSTODIAL PARENT
PARTICIPATION BEG DT: 09 13 2002    WAA PGM REVIEW DUE DT: 09 13 2003
REVIEW COMPLETION DT: __ __ __
CUSTODIAL PARENT:
FAMILY SIZE: 01 # ADULTS    01 # CHILDREN

NON CUSTODIAL PARENT:                PATERNITY VERIF: _
TOTAL INCOME AMT(MTHLY): _____    CHILD SUPPORT PAID AMT(MTHLY): _____
# CHILDREN NAME                SSN                DOB                PTRNTY? CTY
1 _____                _____                _____                _____
2 _____                _____                _____                _____
3 _____                _____                _____                _____

WAA WORKER: XCT266                PROGRAM TRACK: 1
INCOME VERIF AT REVIEW: _                INCOME ELIGIBILITY AMT(MTHLY) : _____
EMPLOYED AT EXIT: Y                ENTRY EARNED INCOME AMT(MTHLY): .00
EXIT EARNED INCOME AMT(MTHLY): 500.00    WAA APP SIGNATURE DT: 09 13 2002
PF13 WPED PF14 WPJR PF15 WPWC PF22 WPWI
NEXT TRAN: _____ PARS: 6100512483_____
    
```

COMPLETE PROGRAM PARTICIPATION ON WPWI

Once this information is entered, the worker can return to WPWI to enter the actual Completion code and completion date.

The worker should carefully check over screen WPWI to check the co-enrollment status of the individual. It is possible for the individual to be open in more than one program and this information can be gleaned from WPWI. For example, the individual could be open in any of the following programs along with WAA:

- Wisconsin Works (W2) Program
- Welfare to Work (WtW)
- Children First (CF)
- Food Stamps Employment and Training Program (FSET)

By carefully checking WPWI the worker can make the appropriate determinations.

If the individual is open in WAA and W2, WPWI should look like the following:

WPWI	UPDATE WP CLIENT INFORMATION - 1	12/16/03 13:23
		XCT266 K CLOUGH
PIN: 3100647416		
:	WDA: 02	CTY/TRIBE: 40 OFFICE: 1575 NEW OFFICE: _____
NAME: BSTALERT PALCED-100503		
ADDRESS: 101 MAIN ST		
CITY: MILWAUKEE STATE: WI ZIP: 53701 MAILING ADDRESS ON WPWC: N		
PRIMARY PHONE: MESSAGE PHONE: _____		
PRIMARY WAGE EARNER: N HEAD OF HOUSEHOLD: Y DOB: 08 17 1974		
CASE: 3700314337 CAT: WW C SEQ: 01 CF RFA: CF RFA DATE:		
REGION NUM: 05 WT RFA: WT RFA DATE:		
LF STATUS: ABAWD: N WA RFA: 2700316827 WA RFA DATE: 12 16		
CF:	FROM:	CTY: CF COMP CD: ___ CF COMP EFF DT: ___ ___ ___
WT:	FROM:	WT COMP CD: ___ WT COMP EFF DT: ___ ___ ___
WA: O FROM: 11 01 2003 WA COMP CD: ___ WA COMP EFF DT: ___ ___ ___		
CASE MGR: XCT266 *WP REG CD: M SYST STS: E FEP ID: XCT266		
ES WKR: XCT266 IM REG: N IM REG EFF: 12 16 2003		
*EFF DT: ___ ___ ___ DT OF LAST CON: 11 01 2003 E/SC: W2 PLACE: W2T		
2PAR: NO DESC: NOT A 2-PARENT HOUSEHOLD		
PF13 WPED PF14 WPJR PF15 WPWC PF22 ACWI		
NEXT TRAN: _____ PARMS: 3100647416_____		

Notice here that there is a case number listed in the CASE field and that the CAT is WW C. Also, there is W2 placement information listed here, in the example above the placement is for W2T.

If the individual were open in WAA and FSET, WPWI would look like the following:

WPWI	UPDATE WP CLIENT INFORMATION - 1	12/16/03 13:30
		XCT266 K CLOUGH
PIN:		
:	WDA: 02	CTY/TRIBE: 40 OFFICE: 2571 NEW OFFICE: _____
NAME:	SHARON	WAA
ADDRESS:	1111	JACKSON ST
CITY:	MADISON	STATE: WI ZIP: 53703 MAILING ADDRESS ON WPWC: N
PRIMARY PHONE: MESSAGE PHONE: _____		
PRIMARY WAGE EARNER: N HEAD OF HOUSEHOLD: Y DOB: 01 01 1960		
CASE:	8700316580 CAT: FS	SEQ: 01 CF RFA: CF RFA DATE:
REGION NUM:	01	WT RFA: WT RFA DATE:
LF STATUS:	ABAWD: N	WA RFA: 4700316845 WA RFA DATE: 12 16 03
CF:	FROM: CTY:	CF COMP CD: CF COMP EFF DT: _____
WT:	FROM:	WT COMP CD: WT COMP EFF DT: _____
WA:	O FROM: 11 02 2003	WA COMP CD: WA COMP EFF DT: _____
CASE MGR:	XCT266 *WP REG CD: M	SYST STS: E FEP ID:
ES WKR:	XCT061 IM REG: M	IM REG EFF: 12 16 2003
*EFF DT:	DT OF LAST CON: 12 15 2003	E/SC: W2 PLACE:
	2PAR: DESC:	
PF13 WPED	PF14 WPJR	PF15 WPWC PF22 ACWI
NEXT TRAN: _____	PARMS: 351024242	

Again notice that there is case number listed in the CASE field and that the CAT is FS. Also notice that the office number begins with a "2", which indicates that the individual is open in the FSET WP office.

As mentioned, the individual could also be open in either WtW and/or CF along with WAA. If the individual were open in any of these programs, there would be an "O" (for Open) next to the CF or WT field on WPWI.

Making the appropriate co-program participation determination is a very important part of the WAA closure process. If the WAA individual is in fact open in another program, it means the individual must NOT be disenrolled from Work Programs after WAA is completed on WPWI. If in fact WAA is the only program open, then the worker must disenroll the WAA individual after completing WPWI.

To complete WAA on WPWI, the worker will need to enter a completion code to indicate the WAA individual has closed due to the sun-setting of the WAA program. The code that must be used is "PA" - "Program Authorization Ended", with a Program completion date that is not greater 12-31-2003, as shown below:

```

WPWI                UPDATE WP CLIENT INFORMATION - 1                12/16/03 13:30
                                                                XCT266 K CLOUGH
PIN: 81006xxxxxx
: WDA: 02          CTY/TRIBE: 40  OFFICE: 2571  NEW OFFICE: ____
NAME: SHARON          WAA
ADDRESS: 1111                JACKSON                ST
CITY:  MADISON          STATE: WI  ZIP: 53703          MAILING ADDRESS ON WPWC: N
PRIMARY PHONE:                MESSAGE PHONE: ____ ____ ____
PRIMARY WAGE EARNER: N        HEAD OF HOUSEHOLD: Y  DOB: 01 01 1960
CASE: 8700316580  CAT: FS    SEQ: 01  CF RFA:                CF RFA DATE:
REGION NUM: 01                WT RFA:                WT RFA DATE:
LF STATUS:                ABAWD: N                WA RFA: 4700316845    WA RFA DATE: 12 16 03
CF:  FROM:                CTY:                CF COMP CD: ____  CF COMP EFF DT: ____ ____ ____
WT:  FROM:                WT COMP CD: ____  WT COMP EFF DT: ____ ____ ____
WA: 0  FROM: 11 02 2003      WA COMP CD: PA  WA COMP EFF DT: 12 31 2003
CASE MGR: XCT266          *WP REG CD: M    SYST STS: E        FEP ID:
ES WKR: XCT061          IM REG: N                IM REG EFF: 12 16 2003
*EFF DT: ____ ____ ____  DT OF LAST CON: 12 15 2003    E/SC:                W2 PLACE:
                                                                2PAR:                DESC:
PF13 WPED  PF14 WPJR  PF15 WPWC  PF22 ACWI
NEXT TRAN: ____          PARS: 351024242_____
    
```

DISENROLL FROM WORK PROGRAMS WHERE APPROPRIATE

Once the individual has been completed from WAA on WPWI, the worker will then determine whether the individual should be disenrolled from Work Programs. Again, this decision will be based on the co-program participation status of the individual. If the individual is open in another program as discussed above, then the individual must **NOT** be disenrolled.

If, however, the individual is not open in another program, the worker should disenroll the individual using the WPDS screen.

On WPDS, the worker will check that the Disenrollment reason is "Other" and enter a "Y" to confirm the disenrollment, as shown below:

```

WPDS                DISENROLLMENT                12/16/03 13:57
                                                                XCT266 K CLOUGH
PIN: xxxx          OFFICE: 2571
NAME: WAA          SHARON          COUNTY/TRIBAL UNIT: 40
DATE:                12 16 2003
REASON:  SANCTION _  OTHER Y
CONFIRM DISENROLLMENT (Y/N)? Y
NEXT TRAN: ____          PARS: 351024242_____
    
```

CONTACTS

BHCE CARES Information & Problem Resolution Center

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Note: Email contacts are preferred. Thank you.

DWD/DWS/BDS/DR