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TO: **Income Maintenance Supervisors  
Income Maintenance Lead Workers  
Training Staff  
Workforce Development Boards  
Job Center Leads and Managers**

FROM: Amy Mendel-Clemens  
Communications Section  
Bureau of Health Care Eligibility  
Division of Health Care Financing

**BHCE/BWP OPERATIONS MEMO**

No: 07-21 Revised 05/29/2007

DATE: MAY 3, 2007

FS	<input checked="" type="checkbox"/>	MA	<input checked="" type="checkbox"/>	SC	<input type="checkbox"/>
CTS	<input checked="" type="checkbox"/>	CC	<input checked="" type="checkbox"/>	W-2	<input checked="" type="checkbox"/>
FSET	<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"/>	WtW	<input type="checkbox"/>		
Other	EP	<input type="checkbox"/>	★		

PRIORITY: HIGH

SUBJECT: **ACCESS "Report My Changes" Phase II**

**CROSS REFERENCE:** Operations Memos 05-38, 06-31, 06-37

**EFFECTIVE DATE:** JUNE 25, 2007 NEW EFFECTIVE DATE

**PURPOSE**

This memo describes the ACCESS "Report My Changes" (RMC) Phase II. FoodShare (FS), Medicaid (MA), Family Planning Waiver (FPW) and Caretaker Supplement (CTS) participants throughout the state can use this expanded tool to report changes to their case through ACCESS.

**ACCESS REPORT MY CHANGES PHASE II**

Currently, recipients of FS, MA, FPW, and CTS are only able to report changes in job income and employment through ACCESS. The expansion of RMC will give recipients a fast, easy way to report several additional types of changes.

RMC II will also inform the recipient about what types of verification could be used to verify the change being reported.

To report a change using RMC, the customer can log onto ACCESS and click on the new Report My Changes tab. All of the security and access rules that are in place for Check My Benefits (CMB) will apply to RMC. A customer does not have to create a new account if s/he has already done so. For more on security and access to benefit information, please refer to the [ACCESS Handbook](#).

RMC is designed to streamline the change reporting process for customers and local agencies. In many cases, phone messages about changes provide unclear or incomplete information, and require extensive worker follow-up. By encouraging customers to report changes on-line, and prompting them for complete information about the change, RMC II should reduce the number of change report phone calls.

## **ACCESS CHANGES**

**Effective June 25, 2007** recipients will be able to use ACCESS to report the following changes:

- Household address, mailing address and phone number
- Housing and utility bills – Add, end or change a specific housing bill. Add or end a utility bill. ACCESS will automatically schedule these pages when the recipient reports a change in household address.
- Household composition including:
  - New pregnancy or the end to a pregnancy for anyone in the household
  - Marriage or divorce for anyone in household. If a new spouse is not part of the household, the “person add” questions will be asked.
  - Disability for anyone in the household
  - Someone moving out of the household.
  - Death for anyone in household
- Person add - Add one or more individuals to the case. ACCESS will schedule a series of pages to collect detailed information about the new person.
- Self-employment - Report new self-employment or change or end existing self-employment income information
- Unearned income - Report new, ended or changed unearned income information

Prior to submitting the change the recipient entered in ACCESS, s/he will be presented with a Change Report summary showing case information, including the changes reported through ACCESS. ACCESS will continue to notify the recipient about what type of proof can be used to verify the change being reported. Recipients will continue to receive a Change Report tracking number and will be able to print out a copy of the completed Change Report for their records. They will also be able to track the status of their changes through Check My Benefits.

As with the existing RMC tool, customers who have a “targeted view” in ACCESS will be restricted from reporting changes on other people in the household. “Targeted view” individuals are adults in the home other than the primary person or primary person’s spouse. As an example, the primary person and primary person’s spouse are able to report that anyone has moved out of the home. A targeted view individual is only allowed to report his or her own move out of the home.

## **CWW CHANGES**

### **ELECTRONIC CASE FILE**

To assist workers in viewing a copy of the Change Report, the Change Report will now be stored in the Electronic Case File (ECF). A PDF of the Change Report will be assigned the ECF code, <CHG - Change Reporting Form> and stored in the Case Information subfolder. (Refer to ECF 1.5 and 1.6 for more information). As always, an image of the Change Report can be viewed by using the View button on the CWW Change Report Summary page.

### **PROCESSING CHANGE REPORTS**

- The Change Report Inbox has not changed and will still give workers a quick way to access Change Reports submitted by customers and assigned to them. Refer to CWW Process Help Chapter 66.2 Change Report Inbox.
- Change Reports will continue to be assigned automatically to the primary caseworker. Each caseworker may access his or her assigned Change Reports directly from his or her CWW home page. Refer to CWW Process Help Chapter 3.9 for more information on how to process a change report.

**NOTE** ➤ Change Reports will not automatically be re-assigned to a new worker when the case is transferred to another county. Remember to process all Change Reports for that case prior to transferring it to the new county.

- The conflict message event panel column header has been changed from “Change Report Information” to “Client Reported Information”. Workers will continue to review information displayed in conflict panel messages and determine whether to accept the client-reported information or keep the current CWW information. Refer to CWW Process Help Chapter 3.12 on the conflict resolution process.
- The Person Add driver used while processing a Change Report is different than the Person Add driver selected from the Case Summary page. CWW pages for all household members will be scheduled when adding a person to a case as reported through ACCESS.
- In the event a customer reports a change that ends a CWW sequence (for example a customer reports that a job ended) the conflict message event panel displayed at the top of the Employment page will say that the “End date (month) must match with the begin month”. To correctly accept the reported change, the worker will click the <Update> button to accept the new information. This action will populate the newly reported job end date in the End Date field. The worker must then go to the Begin month field and update the date to match the end date reported by the customer.

### **CHANGE REPORT SUMMARY PAGE**

- A new Change Report status of “No Action Required” will be added and display on the Change Report Summary page. This status will appear when a worker has reviewed a Change Report and decided that no action on the case is needed and the “No Action Required” option is selected.

- The "Changes Reported" section has been added to the page and will display the types of changes reported on a selected Change Report. This section has been divided into two columns; Household Composition and Financial Information. This enhancement gives workers a quick way to see what type of change was reported on the Change Report.

**Change Report Summary**
Reset

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**Change Report Information**

Change Report Number: **0200020102**

Change Report Worker: **XCTA82**

Change Report Status: **NO ACTION REQUIRED**

Reporting Date: **04/03/2007**

Change Report Details: [View](#)

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**Case Information**

County / Tribe: **MILWAUKEE COUNTY**

Language: **ENGLISH**

Companion Case Flag: **NO**

Office: **5040**

Supervisor Unit: **60**

Case Number: **9700413993**

Case Worker: **JX2189**

Primary Person Name: **JOELLEN PRESTA**

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**Changes Reported**

Household Composition	Financial Information
<input type="checkbox"/> Person Add	<input type="checkbox"/> Employment
<input type="checkbox"/> Person Moved Out	<input type="checkbox"/> Unearned Income
<input type="checkbox"/> Death	<input type="checkbox"/> Shelter and Utility Expenses
<input type="checkbox"/> Marriage	
<input type="checkbox"/> Divorce	
<input type="checkbox"/> Disability Add	
<input type="checkbox"/> Pregnancy Add	
<input type="checkbox"/> Pregnancy End	
<input type="checkbox"/> Contact Information	

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**Companion Case Information**

Case Number:

Case Worker:

Primary Person Name:

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**What would you like to do?**

Start/Continue Processing Change Report

No Action Required on Change Report

Cancel 
[Previous](#)
[Next](#)

CWW Process Help chapters and Systems Help have been updated and include information about the changes described in this memo.

### FUTURE PHASE OF RMC

The following types of changes are planned for a future phase of RMC:

- Dependent care costs/payments
- Child Support payments
- Assets
- Health Insurance coverage
- Medical bills

### **TRAINING**

There will not be specialized training solely for Report My Changes Phase II offered. However, there will be additional offerings of the CWW Refresher Lab over the summer of 2007, and those classes will include hands-on practice with a complicated change report scenario. Workers who would like additional support in processing changes reported through ACCESS are encouraged to attend.

### **CONTACTS**

BEM CARES Information & Problem Resolution Center

★Program Categories – FS – Food Stamps, MA – Medicaid, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – Food Stamp Employment and Training, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WtW – Welfare to Work, WIA – Workforce Investment Act, Other EP – Other Employment Programs.