

DEPARTMENT OF WORKFORCE
DEVELOPMENT
Secretary Roberta Gassman
201 East Washington Avenue
P.O. Box 7946
Madison, WI 53707-7946
Telephone: (608) 266-7552
FAX: (608) 266-1784
www.dwd.state.wi.us



State of Wisconsin
Governor Jim Doyle

DEPARTMENT OF HEALTH AND
FAMILY SERVICES
Secretary Kevin R. Hayden
1 West Wilson Street
P.O. Box 7850
Madison, WI 53707-7850
Telephone: (608) 266-9622
FAX: (608) 266-7882
www.dhfs.wisconsin.gov

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

FROM: Janice Peters, Director
Bureau of Wisconsin Works
Division of Family Supports

DFS OPERATIONS MEMO

No: 07- 44 (Corrected) 08/14/2007

DATE: 8/3/2007

| | | | | | |
|------|--------------------------|-------|-------------------------------------|--------------------------|-------------------------------------|
| FS | <input type="checkbox"/> | MA | <input type="checkbox"/> | SC | <input type="checkbox"/> |
| CTS | <input 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"/> | Other | EP | <input type="checkbox"/> | ★ |

PRIORITY: HIGH

SUBJECT: W-2/CC DATA EXCHANGE – NEW CARES DXDL SCREEN

CROSS REFERENCE: Operations Memo 06-40
Wisconsin Cares Guide, Chapter 10

EFFECTIVE DATE: Immediately

PURPOSE

This Operations Memo informs Wisconsin Works (W-2) and Child Care (CC) administrative agencies of a new Data Exchange (DX) screen specifically for Financial and Employment Planners (FEPs) and Child Care workers use. The new screen is “DXDL – Data Exchange Response List – FEP/CC Workers.” This screen (DXDL) will provide FEPs and Child Care workers with a listing of individuals that have DX dispositions.

This memo also describes a new Web Intelligence (WebI) Data Exchange monitoring report that will allow users to search for DX dispositions using a CARES worker ID.

Note: This corrected Operations Memo is being issued to publish the sample WebI Report #7 that is referred to at the bottom of page 5.

BACKGROUND

The Division of Family Supports (DFS) has instructed W-2 and Child Care administrative agencies (see Operations Memo 06-40) to complete the disposition activity on their DX matches and to verify the information provided to CARES through the Income and Eligibility Verification System (IEVS) within certain timelines. While W-2 agencies have been processing cases per Operations Memo 06-40, it was brought to the attention of DFS that not all FEPs and Child Care only workers were able to view disposition listings on existing CARES screens, including DXRL (Data Exchange Response List) and DXRD (Data Exchange Response Disposition). As a result, it has been difficult for many FEPs and Child Care workers to complete the disposition activity for data exchanges for individuals and cases they are responsible for.

To resolve this issue, a new DX disposition listing screen, DXDL, has been developed to provide disposition lists only for FEPs listed on WPWW (Wisconsin Works information) and for Child Care workers that are entered on the Child Care Activity Status page in CARES Worker Web (CWW).

PROCESSING DATA EXCHANGE MATCHES

There are several steps workers must take to process a data exchange match and complete the disposition. These are as follows:

1. Identify cases with matches using DXDL.
2. Review the information provided and compare it to what is entered in CWW.
3. Determine if further verification of the information is required.
4. Update the information in CWW/CARES as appropriate.
5. Create an overpayment as appropriate.
6. Update the disposition in CARES on DXRU (Update Disposition Details screen).
7. Complete the screen DXUS (Update Savings Details screen) if a cost savings was realized by the match.

NEW CARES SCREEN - DXDL

The new CARES screen, DXDL, displays a listing of individuals who have incomplete DX dispositions.

IMPORTANT: The new disposition listing screen, DXDL, has been developed to provide disposition lists **ONLY** for FEPs listed on WPWW and for Child Care workers that are entered on the Child Care Activity Status page in CWW.

Primary workers that are not a FEP or a Child Care worker will not be able to query the data exchange dispositions of their cases on DXDL. This group of workers must use the existing screens of DXRL and DXRD to obtain a listing of their DX dispositions. Primary workers that **are** listed as **FEPs** or **CC** workers, will be able to view a listing of dispositions for individual W-2 and Child Care cases on this screen.

Only those dispositions that are incomplete and require action by the FEP or Child Care worker will be listed in the new DXDL screen. Dispositions that require worker action and are considered incomplete have one of the following four review action codes:

| |
|-------------------------------------|
| WA - ESS ACTION REQUIRED |
| CL - CLIENT VERIFICATION |
| FR - FRAUD INVESTIGATION |
| TP - 3 RD PARTY REFERRAL |

Dispositions that do not require worker action and are considered complete have one of the following three review action codes:

| |
|-------------------------|
| NA - NO ACTION REQUIRED |
| CO - ACTION COMPLETE |
| IO - INFORMATION ONLY |

DXDL PROCESS OVERVIEW

The DXDL screen will be used by FEPs and Child Care workers to obtain a listing of individuals that have incomplete data exchange dispositions. It is important to note that the listing on DXDL will include individuals on closed cases that still have incomplete data exchange dispositions.

DXDL will not return information on individuals with incomplete dispositions created prior to January 1, 2005. W-2 agencies are not required to work dispositions prior to January 1, 2005.

There are several ways to query DXDL. A CARES worker can view a list of their own dispositions, or they can view a list of dispositions that belong to another worker. Some workers may have quite a few incomplete dispositions. Because of this, DXDL will return up to 200 dispositions per worker at one time. This limit was set due to performance issues in CARES when more than 200 dispositions per worker are displayed.

A worker can enter dates in the PARMS (Parameter) field to limit the size of the list when more than 200 incomplete dispositions exist. This feature will make it easier for a worker to manage dispositions in the event that he or she has more than 200 incomplete dispositions. If a worker has more than 200 dispositions, a query on DXDL will result in the error message "X60 – LISTING TOO LARGE, NARROW SEARCH CRITERIA" being displayed. When this error message appears, the worker requesting the list must enter date parameters in the PARMS field to obtain a smaller list.

The query options are:

1. The logged-in worker enters DXDL in the TRAN field; the screen will bring back a listing of all individuals that have incomplete dispositions for which the logged-in worker is the FEP or the Child Care worker.
2. The logged-in worker enters DXDL in the TRAN field and another CARES worker ID in the PARMS field; DXDL will bring back a list of individuals that have incomplete dispositions for which the other worker is the FEP or Child Care worker.
3. The logged-in worker enters DXDL in the TRAN field and their own worker ID and a date range in the PARMS field to obtain a listing of their own dispositions for the time period

entered. The PARS information that would be entered: Worker ID / BEG MMDDYY / END MMDDYY.

- The logged-in worker enters DXDL in the TRAN field and another worker ID and a date range in the PARS field to obtain another worker's disposition listing for the time period entered. The PARS information that would be entered: Other Worker ID / BEG MMDDYY / END MMDDYY.

EXAMPLE: Carla, a W-2 supervisor (with CARES ID XCT789) would like to query the dispositions for one of her workers. She trans to DXDL with worker ID XCT123 in the PARS field. She gets error message X60-LISTING TOO LARGE, NARROW SEARCH CRITERIA. This alerts Carla to the fact that there are more dispositions that are not being displayed, and they were created after January 1, 2005. She enters DXDL in the TRAN field and XCT123 / 01012005 / 12312005 in the PARS field. This listing brings back only those dispositions that were created from January 1, 2005, through December 31, 2005.

DXDL SCREEN DETAILS

The information below provides a description of each field on the new screen.

| | | |
|--|--|----------------------------------|
| DXDL | DATA EXCHANGE RESPONSE LIST - FEP/CC WORKERS | 07/10/07 12:42 XCT545 M WELCH |
| WORKER ID: XCT546 | | |
| | SSN NAME | ST TYPE MATCH DT ACT |
| 1 | 984848751 ANNA DOE | DLSW 01 01 07 WA |
| 2 | 890334453 JESSE M JONES | WI SSBX 07 22 06 WA |
| 3 | 654889998 ROBERT SMITH | PA TNUC 03 19 06 WA |
| 4 | 654589998 ROBERT SMITH | DLSW 03 05 06 WA |
| 5 | 556233998 THOMAS S WHITE | WI SSBX 10 02 05 WA |
| 6 | 984848751 ANNA DOE | PA TNUC 09 03 05 WA |
| 7 | 984848751 ANNA DOE | PA TNUC 09 02 05 WA |
| 8 | 984848751 ANNA DOE | PA TNUC 09 01 05 WA |
| 9 | 556233998 THOMAS S WHITE | WI SSBX 07 22 05 WA |
| 10 | 954733211 JESSE M BLACK | WI SSBX 07 16 05 WA |
| 11 | 984848751 ANNA DOE | DLSW 07 04 05 WA |
| 12 | 984848751 ANNA DOE | DLSW 07 02 05 WA |
| ENTER SELECTION NUMBER: ___ | | |
| PF14 - UPDATE DISPOSITION (DXRU) | | |
| NEXT TRAN: _____ PARS: XCT546_____ MORE... | | |

WORKER ID: Displays the ID of the worker whose dispositions are being queried.

SSN: Displays the Social Security Number of the individual who has the incomplete disposition.

NAME: Displays the name of the individual who has the incomplete disposition.

ST: Displays the name of the state that paid or is paying unemployment compensation benefits to this individual. Values for this field can be found on reference table TSTA.

TYPE: Displays the exchange type code for each disposition. These codes can be found on reference table TDXT.

MATCH DT: Displays the date that the Data Exchange match occurred. Dispositions with a match date prior to January 1, 2005, will not display on this screen.

ACT: Displays the incomplete disposition action codes. The incomplete disposition action codes are WA, TP, CL and FR. These codes are found on reference table TDRA. DXDL will not display dispositions that are completed.

ENTER SELECTION NUMBER: There are two ways to use this field: 1) to view the match type detail screen such as DXDW or DXIU, enter a disposition line number (located in the first column displayed on this page) and press enter; or 2) to view screen DXRU for the particular individual, enter the disposition line number in the selection field and press PF14.

EXISTING AND NEW WEBI REPORTS

Workers can access the DX Monitoring Reports in Webl to view a listing of all individuals who have outstanding matches, and to monitor their progress in meeting the 45 and 90 day IEVS requirements for completion of their data exchange reviews. There are six existing Webl reports on data exchanges that are described below. A new Webl report (Report #7 below) allows the user to query dispositions for a specific worker ID.

Each of the Webl reports can be accessed by selecting Corporate Reports, and further selecting the DX Monitoring Folder. These reports provide information on specific aspects of the IEVS matches or dispositions.

Existing Webl Reports #1 and #2

Data Exchange report #1 provides a summary and report #2 provides a detailed report of all matches with incomplete dispositions due for 45 days or more.

Existing Webl Reports #3 and #4

Data Exchange report #3 is a summary and #4 is a detailed report of the overdue dispositions that have been completed during a specific month.

Existing Webl Reports #5 and #6

Data Exchange report #5 provides a summary and report #6 provides a detailed report by agency of all matches that are due within 45 days and for which dispositions have not been completed.

New Webl Report #7

This report allows the user to query dispositions by Worker ID. This new report will provide local agency staff with another tool to use to manage their dispositions. A sample copy of this report is included in this memo as an attachment.

TRAINING

Data Exchange training, which includes details about the new DX screen, DXDL, is available for agency staff. The training consists of a self-study guide, titled “Data Exchange for W-2 and Child Care”, that staff can access and review as needed. The training will be available beginning in August.

Agency staff who are interested in accessing this training are encouraged to go to the DWD Learning Center at <https://wss.ccdet.uwosh.edu/stc/dwd>.

CONTACTS

For Policy Related Questions: DFS/BW-2 Regional Administrators

For CARES Processing Questions: W-2/CC Call Service Center

Program Categories – FS – FoodShare, MA – Medicaid, 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, RAP – Refugee Assistance Program, WIA – Workforce Investment Act, Other EP – Other Employment Programs.

DWD/DFS/BW2/AE