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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:	07-65				
DATE:	12/11/2007				
FS	<input type="checkbox"/>	MA	<input type="checkbox"/>	SC	<input type="checkbox"/>
CTS	<input type="checkbox"/>	CC	<input 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		
PRIORITY: HIGH					

SUBJECT: Follow-Up Q & A for W-2 Work Participation Documentation, Verification and Supervision Policy and Procedures

CROSS REFERENCE: [Operations Memo 07-55 \(Corrected\), W-2 Work Participation Documentation, Verification and Supervision Policy and Procedures;](#)
[Operations Memo 07-38 \(Corrected\), Best Practices for Wisconsin Works \(W-2\) Participation;](#)
[Operations Memo 06-46, Updated W-2 Two Parent Guidance](#)

EFFECTIVE DATE: Immediately

PURPOSE

The purpose of this memo is to respond to questions from W-2 agencies regarding:

1. W-2 Work Participation Documentation, Verification and Supervision policies and procedures, which were released to agencies in Operations Memo 07-55.
2. Federal Temporary Assistance for Needy Families (TANF) Work Participation Requirements.

BACKGROUND

Since the release of the original version of Operations Memo (OM) 07-55, a number of questions and concerns have been raised by W-2 agencies. As a result, two separate actions have been taken by the Department. The first action was to reissue OM 07-55 with some

revisions. The revisions to OM 07-55 provide further instructions and examples and include some changes to the documentation and verification requirements. The second action is to release this memo which responds to questions raised by W-2 agencies regarding the Documentation, Verification and Supervision policies and procedures. This memo will also cover some questions that have been asked by agencies over the previous year regarding Federal TANF Work Participation Requirements.

W-2 AGENCY QUESTIONS & ANSWERS

DOCUMENTATION AND VERIFICATION

- Q1. For the activities that we need to collect participation bi-weekly, can we collect from the 1st-15th and 16th-end of the month? This would coincide with the pay period timeframes and is just over the 14 days. If we go every other week, the due date could be as much as 10 days after the 15th which won't work with pull down. (i.e.: Due dates going every other week in 2007 are 9/14, 9/28, 10/12 & 10/25. We would not know about 10/15 participation until the customer submits bi-weekly log due 10/25. 10/25/7 is W-2 pull down which would not give us anytime if the customer turned it in after hours.)**
- A1. Language was revised in OM 7-55 that changes collection of verification items from bi-weekly to twice per month. When collecting verification items twice per month, the verification should cover participation from the 16th of the month through the end of the month and the first of the month through the 15th of the month to align with the W-2 participation period. Agencies should develop procedures for the collection of verification items that ensure that workers will have time to review the verification items and record any non-participation prior to W-2 pull-down.
- Q2. OM 07-55 indicates that if the W-2 Agency has a large number of participants engaged in the same activity at one location, the documentation can be kept in a central location by the W-2 Agency. What does that mean exactly? For example, we have a worksite in the community where many of our W-2 participants work. Could the detailed TANF required documentation be kept at the worksite? The worksite could then provide the W-2 Agency with some more limited attendance report?**
- A2. The documentation must be kept at the W-2 agency and made available upon request. The Documentation, Verification and Supervision chart attached to the revised version of OM 07-55 included a change to the verification requirement for Work Experience. The W-2 agency is required to obtain the documentation that verifies participation from the worksite at least twice a month.
- Q3. If we have documentation for an individual's participation on a group list, why can't we place it in his/her case file?**
- A3. Names and attendance information for other attendees that appear on a group list should never be placed in a participant's case file because of confidentiality reasons. The agency can either block out the names and attendance information of all other attendees and scan it into the participant's electronic case file or the agency may choose to keep group attendance information in a central location at the W-2 agency and make it available upon request.

Q4. How long do we have to hang on to group activity list records?

A4. Any type of paper verification items must be retained for a minimum of 3 years and 6 months.

Q5. Can a case manager look at the group listing and verify that the participant did the activity?

A5. If the agency chooses not to retain group attendance information in a central location as a method of verification, then there must be verification placed in the participant's electronic case file. The verification item could be a written statement from the caseworker noting that attendance was verified through a review of a group attendance document. The verification would also need to include the minimum documentation requirements listed for that activity.

Q6. When there is a group activity list held in a central location, what happens when an individual connected with that list transfers out and the list is paper only?

A6. The Department will know from the case history in CARES what agency the participant was enrolled with at the time the participation occurred. Agencies will not be expected to transfer group participation information when a participant transfers to a new agency.

Q7. Can a prescription for a drug document a medical appointment?

A7. No, a prescription for a drug can not document a medical appointment as it doesn't cover the time in and out of the activity.

Q8. Regarding self-directed employment search, how is documentation, verification and supervision accomplished when the individual applies for a job through a blind post office box/generic human resource office?

A8. Keep in mind that agencies are verifying participation for the time it takes to perform the activity. In situations where the participant is completing an application/resume and then mailing it to a post-office box or a generic human resource office, the participant would be recording on the activity log the time spent completing the application/resume and dropping it in the mail. If the agency elected to use that employer contact as part of the 25% random follow-up, the caseworker could ask the participant to bring the application and envelope into the agency and have the agency mail it directly.

Q9. For activities that require a participant to complete an individual activity log, what happens if they don't fill it out correctly?

A9. Case workers must be prepared to coach participants on how to complete the logs and may need to work with some participants initially to fill in missing information.

Q10. What do we do if an individual has a doctor's appointment and forgets to have the medical provider sign the activity log? What if the individual won't get the signature?

A10. The participant has the primary responsibility to obtain verification of medical appointments, treatment and counseling. If the participant forgets to ask for the signature, they can be instructed to return to the medical provider to obtain the

signature. If the participant refuses to obtain the signature, there is no verification of the activity and non-participation should be recorded for the activity. If the participant is unable to get a signature because the medical provider refuses, the agency must assist the participant by attempting to verify the information contained in the activity log. For more information, review the *Supervision* section of OM 07-55.

Q11. Can you explain the consistency between weekly and biweekly verification reporting requirements?

A11. The revised version of OM 07-55 changes bi-weekly collection of verification to twice per month. The revised memo also changes timeframes for collecting verification for Work Experience from weekly to twice per month. With these changes, there is more consistency across the verification requirements. Those activities that cannot be reasonably supervised face-to-face (i.e., self-directed job search, self-directed physical rehabilitation) require both weekly collection of verification and weekly contact with the case manager. All other W-2 activities that count towards the TANF Work Participation Rate have some type of face-to-face supervision. For these activities, verification is required to be collected twice per month.

Q12. How do agencies track participation in the "SD" component? Are there any suggestions on how to track/document caring for a disabled child?

A12. A number of revisions were made to the section of the OM 7-55 Documentation, Verification and Supervision chart that covers activities that do not count toward TANF Work Participation Rates.

For individuals assigned to either SS[D]I Advocacy or Caring for Disabled Child/Other Family Member, appropriate assessment documentation or required DFS forms constitute documentation. The W-2 agency is required to document in the case file (either CARES case comments or ECF) ongoing quality case management practices. At a minimum, this includes documenting monthly contact with participant.

Q13. What is the reason for tracking non-countable W-2 activities so strictly when in fact they are not counted by DHHS/ACF for TANF Work Participation?

A13. The reason for requiring agencies to verify participation is to ensure that participants are accountable for the activities they perform in exchange for their W-2 benefit. In the eyes of the participant there should be little difference between performing those activities that meet TANF Work Participation and those that do not.

Q14. Is it necessary to include an "actual hours" field on the attendance form if we are already including scheduled hours, start time and end time? Can't the actual hours be figured out from that information?

A14. Yes, the actual hours need to be recorded on the documentation. The participant doesn't necessarily have to calculate it, but someone does.

Q15. Regarding obtaining an electronic print out from the worksite for work experience verification, what if the print out does not include the scheduled daily hours? Will the print out still be sufficient?

A15. No, the print out is not sufficient. The documentation must contain the information identified on the Documentation, Verification and Supervision chart.

Q16. Does travel time need to be documented to show actual time spent traveling from one activity to the other? Or can the FEP estimate the travel time? Also, which activity can the agency include travel time as part of for participation hours - is it the activity the participant is traveling from or the activity the participant is traveling to or whichever activity would benefit the participant/agency the most?

A16. When two or more activities are assigned for the same day, the travel time between the two activities may be counted toward hours of participation. Travel time to the first activity and the time spent returning home after the last activity cannot be counted towards hours of participation. For activities such as Work Experience and Adult Basic Education that require onsite supervision, the FEP in consultation with the participant should estimate travel time between activities. The estimated travel time should be based on factors such as mode of transportation (i.e., automobile vs. bus) and the geographic distance between activities. The FEP will need to make a note on the participation documentation items of the travel time that is counted towards participation. For activities that the participant completes independently such as medical appointments and self-directed job search, the participant should document the travel time between activities as part of the individual activity log.

In order to have some consistency about which activities to apply travel time, the FEP should apply the travel time for the activity that the participant is traveling to. For example, if a participant is traveling from Work Experience to Adult Basic Education, the travel time would be applied to the Adult Basic Education activity.

SUPERVISION

Q17. Who supervises in instances where the participant is participating in a correspondence or online course?

A17. As described in the Documentation, Verification and Supervision chart attached to Operations Memo 07-55, participants should have assigned to them a liaison at the education/training center that will provide supervision and verify participation. If there is no person at the educational institution who is able to verify participation, then there is no accountability for participation in that activity and the agency should look at reassigning the participant to a more appropriate activity.

Q18. Who would sign off as supervisor for a self-employed person?

A18. The W-2 case manager must review and sign the documentation (e.g., tax records, budget work sheet, monthly financial records).

Q19. Is there an expectation of home visits if face-to-face appointments or phone calls can't be accomplished due to no phone or participant inability to get into office?

A19. Agencies have a responsibility to ensure that participant contact requirements are met. The method of contact should be based on the requirements laid out in the Documentation, Verification and Supervision chart and needs of the participant. This may include a home-visit when appropriate.

Q20. Our W-2 Agency employs a Work Site Coordinator for work experience. Is the coordinator's signature on the attendance verification documentation sufficient?

A20. If the Work Site Coordinator is the direct supervisor at the work site, then yes, that person's signature on the attendance verification documentation is sufficient. If the Work Site Coordinator is not acting as the work site supervisor, then the answer is no.

CARES PROCESSING

Q21. Will the Employability Plan (EP) in CARES be redesigned to allow for keying more information?

A21. Many good EP enhancements have been suggested, however currently there are no plans to redesign the screen due to budget constraints.

Q22. What if the individual completes an activity at a different time on a particular day?

A22. No action is necessary in CARES if the participant completes all scheduled hours of assigned activities during the week in which they were assigned.

Q23. Can agencies create a reference form for daily scheduled hours to be used in conjunction with EP?

A23. Yes. The revisions to OM 07-55 include new language under *Assigning Activities in Employability Plan*. The language clarifies that case workers may provide details for each activity in a separate written work schedule. If this approach is used, the worker must indicate this in the Remarks section on WPAS and the work schedule must be scanned into ECF.

Q24. What is your recommendation for ongoing medical appointments that occur less often than weekly? How should we handle this on WPCS/WPCH?

A24. When assigning medical appointments, treatment or counseling that occurs less often than weekly, agencies should follow instructions in revised version of OM 07-55, page 7 under *Adjusting Hours of Participation*.

Q25. How do we accurately document the time spent on medical appointments and other components/activities when we are guessing the amount of time the appointment/activity will take?

A25. Refer to revised version of OM 07-55, page 8 under *Assigning Assessment, Treatment and Counseling Activities*.

Q26. In developing an EP that includes an ongoing medical appointment, we determine that the participant meets with the doctor every other week. Do we have to change the EP every week to reflect this, or can we simply state the frequency in the EP? (Example: Ongoing Medical Location: Riverside Clinic Dr. Campbell & Dr. Snow. Remarks: Dr's appointments every other week – see weekly report form.)

A26. The EP can reflect that the appointment is scheduled to occur bi-weekly.

Q27. We know attendance can be backdated should a FEP forget to change the client's activities from the scheduled to actual phase. Can non-participation also be backdated?

A27. Yes, non-participation can be backdated on WPNH. However, it can only be backdated into a period of time in which the activity was open on WPCH. If non-participation is entered after W-2 Pulldown for a prior W-2 participation period, then the worker would need to recoup the overpayment for the missed hours.

Q28. If a participant is assigned and begins an activity at a worksite, but subsequently stops going to the worksite and is re-referred to our agency by the worksite, do we keep him/her in the Actual phase during this re-referral process, or change the activity to Scheduled?

A28. If the participant stops attending a work-site, non-participation should be recorded in CARES until such time as the work site is no longer available. In these circumstances, the participant should also be reassessed to determine the appropriateness of the activity. If there is no longer a worksite available for the participant to attend, the activity should be end-dated as of the date the site is no longer available. During the re-referral process, the participant should be assigned the activity in the Scheduled phase on WPCS until a worksite is available.

Q29. Is there a minimum/maximum time period for the Scheduled phase?

A29. There is no minimum or maximum time period for the Scheduled phase.

Q30. Does the Scheduled phase count towards the TANF Work Participation Rate?

A30. No, the activity will not be counted until it is posted in the Actual phase on WPCS.

Q31. In our W-2 agency, the Work Experience activity includes an orientation and a one-to-one meeting between site placement personnel and the customer. This is the order:

- **Customer attends work experience orientation.**
- **Customer meets with sub-contracted staff to discuss potential sites. Site interviews may also be scheduled at this meeting.**
- **Site interview (required for some sites).**
- **Customer begins working at site.**

Just to confirm, we would change the WE component from Scheduled to Actual on the day of the orientation, correct?

A31. Yes, the participant could be placed in the Actual phase but only assigned the hours that the orientation took place. The assigned hours for Work Experience could not be increased until the day the participant was expected to begin working at the site. As described in the corrected version of OM 07-55, when increasing or decreasing the hours for an activity, the worker must record an Actual End Date for the activity and re-enter the activity with a new Begin Date and the new weekly and daily scheduled hours to reflect the change in the number of assigned hours.

FEDERAL TANF WORK PARTICIPATION REQUIREMENTS AND W-2 ACTIVITIES

Q32. What if an individual is assigned self-directed ES consisting of 10 employer contacts for 8 hours/week and subsequently completes the hour assignment but only contacts 8 employers? If the assignment isn't completed, it would be non-participation, but what would the non-participation be for, hours or contacts?

A32. Imposing non-participation must be based on whether the participant engaged in that activity for the correct number of hours. In the example above, the participant met the participation requirement.

If the caseworker chooses to assign a specific number of employer contacts in conjunction with the assigned hours of participation, the number of contacts should be based on factors such as participant's personal abilities and the methods used to apply for a job. For example, applying for jobs on the internet is likely to take less time than traveling to an employer's place of business to apply. The number of assigned contacts can be adjusted to fit the personal circumstances of the participant. If a caseworker believes a participant is misleading the agency in respect to the information the individual is writing on his/her activity log, the agency may follow-up with employers directly to determine if the participant is cooperating with job search.

Q33. Will Employment Search (ES) count as a Non-Core activity after the six weeks of Job Search and Job Readiness is used up, or will ES stop counting as a work activity altogether after the six weeks are up?

A33. Based on Wisconsin's status as a "needy state" as defined by the Federal Department of Health and Human Services, Employment Search and other activities that fall under the Federal definition of Job Search and Job Readiness may count towards the 20 hour per week Core Work Participation Requirement for 12 weeks in a federal fiscal year (October 1 – September 30) and no more than 4 consecutive weeks. After the 12 weeks have been counted towards the Core Work Participation Requirement, Employment Search will not be counted as either a Core or a Non-Core activity for the remainder of the fiscal year.

Q34. If Job Readiness/Motivation (MO) begins on Monday and childcare arrangements are expected to be made before Monday, does the time spent arranging for childcare count as MO? If not, what CARES activity code would it count under?

A34. The time spent arranging for child care should not be posted as a W-2 activity on WPCS/WPCH. Also, keep in mind that initial W-2 placements should never be delayed for the sole reason that child care is not available. If available and appropriate, offer the use of the W-2 agency on-site child care to the parent until an ongoing child care arrangement is found. If the W-2 placement has been made and activities have been assigned but no child care is available, the caseworker should enter non-participation for the activity and use the CARES good cause reason, <child care necessary – not available>. See 11.3.1 of W-2 Manual for policy on child care and W-2 participation.

Q35. Are the Vocational Adult Basic Education, Vocational English-as-a-Second – Language and Vocational Literacy Skills activities allowable to use for educational activities geared at getting the client into training? What would an appropriate time frame for use of these activities be? Can the Department define “limited duration” in relation to these activities?

A35. The W-2 activities Vocational Adult Basic Education, Vocational English-as-Second – Language and Vocational Literacy Skills should be assigned when the educational activity is included as part of the job skills training curriculum in order to raise the individual to the needed level of proficiency. The activity may precede the vocational training or run concurrently with the training. The Department does not intend to define “limited duration” for these activities.

Q36. For a participant in Work Experience, what should be done if s/he is hospitalized? Should s/he be taken out of the activity if hospitalization is longer than a day or two?

A36. The agency may take two different courses of action depending on the circumstances of the case. The Work Experience hours may be recorded as non-participation with good cause. Or if appropriate, the agency may end-date the Work Experience activity at the start of the hospitalization and assign Physical Rehabilitation which may in certain circumstances count towards a participant’s Core Work Participation Requirement. Before assigning Physical Rehabilitation, the worker must ensure that the hospital stay meets the definition and purpose of the activity.

W-2 T AND WORK PARTICIPATION

Q37. We need suggestions for W-2 Ts: Max of 28 hours in work activities, but TANF requires 30 hours. Do these W-2 Ts who are only assigned 28 hours “fail” the TANF “test”?

A37. In most cases, W-2 policy should not preclude a W-2 T participant from meeting the TANF Work Participation Rates. W-2 policy requires that W-2 T participants be placed in up to 28 hours of work training activities and up to 12 hours of education and training activities, which means a participant may be engaged in up to 40 hours per week. For a single parent caring for a child between the ages of 1 and 5, the TANF Work Participation Requirement is 20 hours of Core activity per week. For a single parent caring for a child who is age 6 or older, the TANF Work Participation Requirement is 20 hours of Core activity plus an additional 10 hours of other activity (either Core or Non-Core). Agencies can refer to Operations Memo 07-38 for a break down of which W-2 activities may be applied to Core versus Non-Core participation.

For individuals who already have his/her GED, HSED or high school diploma, but is in need of developing additional skills to obtain employment, agencies should consider assigning job skills training. This may be assigned as part of the 10 to 12 hours per week of education and training allowed by CSJ and W-2 T policy, or if the training is more than 10 to 12 hours per week, it can be assigned using the W-2 policy on aggregated education and training described in Section 8.2 of the W-2 Manual.

The Department recognizes that not all participants placed in W-2 T will be able to fulfill the Core Work Participation Requirements. Agencies should continue to focus on assigning activities that are most appropriate for helping the individual overcome his/her

employment barriers and develop skills necessary to enter the workforce. Operations Memo 07-38 also includes a section on strategies for engaging W-2 T participant.

Q38. When short-term disability or incapacitation becomes long term, what case management actions need to be taken and what should the CARES activity code be changed to? Do actions and activity codes vary when this occurs, for example, at 3 months or at 6 months?

A38. The overall emphasis of the program and the expectations for case management did not change with TANF Reauthorization. Workers must determine, on a case-by-case basis the appropriate case management actions. If a disability is determined to be long-term, this may warrant the need for SS(D)I Advocacy, but it will depend on the severity of the disability and the goals of the participant.

The only W-2 change that was implemented on October 1, 2006, that may directly impact a case with long-term disabilities or incapacitation is when there is a need to assign either Physical Rehabilitation or Personal Care. The new definitions for these activities were included in Operations Memo 06-44 and changed significantly.

As an example, an individual who initially is determined to have short-term medical needs may be assigned to Physical Rehabilitation (medically necessary activities anticipated to last 6 months or less and geared towards helping an individual recover in order to enter the workforce.) If new information is later obtained indicating that the medically necessary activities will last longer than six months beyond the date when the new information became available, the caseworker should close the Physical Rehabilitation activity and assign other appropriate activities. These might be Personal Care or Ongoing Medical, depending on the nature of the activity. The actions taken by the worker and the reasons for the action should be documented in case comments.

GOOD CAUSE POLICY

Q39. What is the impact on the state if Good Cause hours leave us short on TANF hours?

A39. While W-2 good cause policy does not limit the number of hours a participant may receive good cause for non-participation, there are limits on the number of good cause hours that may be counted towards the TANF Work Participation Requirement. The Department will keep track of reportable hours through its federal reporting data system.

Q40. Will the State's policy on Good Cause change to reflect the TANF regulations of no more than 10 excused absences in a 12 month period?

A40. A few good cause reasons have been added, however, the Department is not limiting the number of times a participant may miss activities with good cause.

TWO-PARENT FAMILIES

Q41. Are there a minimum number of work activity hours that a two-parent household must be assigned to under the new W-2 two-parent policy?

A41. The W-2 policy for two-parent families has not changed. The first parent, the parent placed in a W-2 employment position, must participate in up to 40 hours of W-2 activities, of which no fewer than 30 (or 28 if placed in W-2 T) must be in work training activities. If the family is not receiving federally-funded child care, the second parent

may volunteer for W-2 activities but is not required to participate. If the family is receiving federally-funded child care, the second parent must participate in allowable W-2 activities for a minimum of the difference between the number of hours the parent in the employment position participates in assigned activities and 55 hours per week.

OM 06-46 provides guidance for CARES screen WPTP which assists case workers in determining which W-2 cases meet the two-parent family definition and the corresponding TANF Work Participation Requirement. The federal requirement is 55 hours for a W-2 two-parent family that is receiving federally funded child care and 35 hours for a W-2 two-parent family that is not receiving federally funded child care.

- Q42. Is it true that for a W-2 two-parent household, if the primary parent is in a W-2 T placement for short term rehabilitation due to an injury and will not be able to meet 35 hours per week of participation and the second parent does not volunteer to participate, they will not meet the W-2 two-parent family participation requirements.**
- A42. Yes that is possible. As stated in OM 06-46, “Although the second parent is not required to participate when the two-parent family is not receiving federally funded child care, the second parent should be strongly encouraged to participate on a voluntary basis when possible, in order to help the family move towards achieving self-sufficiency.”
- Q43. Why isn't the household considered a W-2 two-parent family if the mother and father are married but have no child in common?**
- A43. The definition of a two-parent family referenced in OM 06-46, adjusted the state's definition of W-2 two-parent family to mirror the federal definition so the Department can more accurately track two-parent Work Participation Rates. The federal definition requires that there be a child in common.
- Q44. Why isn't the household considered a W-2 two-parent family if one of the parents is defined under W-2 policy as a disabled adult?**
- A44. W-2 policy mirrors state statute and federal regulations. While most disabilities do not prevent a person from working and the W-2 program does encourage and support disabled parents working to the best of their abilities, federal regulations allow two-parent families with a documented disabled parent in the family (or one of the two parents caring for a documented severely disabled child in the household) to be removed from the federal two-parent Work Participation Rate. However, federal regulations do not remove the same family from being included in the federal all-family Work Participation Rate.
- Q45. Per Operations Memo 06-46, does answering “Yes” to question #2 (*Is a parent a disabled adult for W-2?*) on the WPTP Screen, mean that the entire Assistance Group becomes exempt from both the two-parent and all-family participation rates, or will the non-disabled parent then be in the all-family participation rate?**
- A45. By answering yes to question #2 on CARES screen WPTP, the family will not be included in the two-parent family Work Participation Rate calculation, but will be included in the all-family Work Participation Rate calculation.

Q46. Would the parent be considered disabled under W-2 policy if s/he is “certified” at 10% to 15% disability by the Veterans Administration (VA)?

A46. Yes, if in fact this was supported by medical documentation, the parent would be considered disabled for two-parent family purposes. Reference the updated definition of a W-2 disabled adult provided in OM 06-46 for W-2 two-parent families.

MISCELLANEOUS

Q47. Which CMC cases will count toward the TANF Work Participation Rate?

A47. Based on Federal TANF Regulations, a participant who is caring for a child less than 12 months old may be disregarded from the TANF Work Participation Rate for a total of 12 months over the participant’s lifetime in the program. As a result, a CMC will generally not be counted towards the TANF Work Participation Rate unless they have used up the 12-month lifetime counter. However, a CMC participant who volunteers for W-2 activities and meets the TANF Work Participation Requirement will be included as part of the TANF Work Participation Rate calculation.

Q48. Are the new W-2 policies going to affect the extension process?

A48. At this point in time, there have not been any impacts identified with regard to the W-2 time limit extension policy.

Q49. Will there be an updated or revised Medical Examination and Capacity form to take into account the six months or less policy regarding physical rehabilitation?

A49. We will be evaluating the need for any revisions to this form. In the mean time, in order to ensure that the needed information is provided, the case manager may handwrite a question on the form to obtain the additional information. For example, one section of the form asks:

In what type of treatment plan is the patient involved for the symptoms mentioned. (Include the number hours involved in a treatment program each week and/or treatment that needs to occur during a normal workday and the type of activities or treatments, examples: physical therapy, self-initiated or organized exercise program, smoking cessation program, weight loss program, counseling.)

Below this section, the caseworker may handwrite:

Please also specify the timeframe the treatment program is expected to last.

Q50. Who/what is a qualified assessing agency?

A50. This definition is found on pages 3 and 4 of the *Wisconsin Works Screening and Assessment Policy* document, released via OM 03-16. This document can also be accessed on the Barrier Screening Tool website at <http://dwd.wisconsin.gov/dws/w2/bst/default.htm>. The paragraph below, excerpted from this document provides a definition of a qualified assessing agency:

Formal assessments must be completed by a qualified assessing agency or individual. A professional qualified to perform a formal assessment may include: a medical or mental health professional, social worker, psychologist, neuro-psychologist, Division of Vocational Rehabilitation counselor or similar qualified assessing agency or individual. Characteristics required of the assessing

agency or individual include:

- Demonstrates a competency or successful completion of training in the appropriate field and is certified by an appropriate accreditation organization.
- Demonstrates an understanding of the objectives of the assessment based on W-2 referral information, referral questions, the initial interview and stated purpose of the evaluation.

CONTACTS

For Policy Related Questions: BW-2 Regional Office Staff

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/BW-2/HH