



DEPARTMENT OF  
CHILDREN AND FAMILIES  
Secretary Reggie Bicha  
201 East Washington Avenue, Room G200  
P.O. Box 8916  
Madison, WI 53708-8916  
Telephone: 608-266-8684  
Fax: 608-261-6972  
dcf.wisconsin.gov

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

**State of Wisconsin  
Governor Jim Doyle**

**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 Working Families  
Division of Family and Economic Security

<b>DFES OPERATIONS MEMO</b>					
<b>No:</b> 08-44					
<b>DATE:</b> 09/22/2008					
<b>FS</b>	<input type="checkbox"/>	<b>MA</b>	<input type="checkbox"/>	<b>BC+</b>	<input type="checkbox"/>
<b>SC</b>	<input type="checkbox"/>	<b>CTS</b>	<input type="checkbox"/>	<b>CC</b>	<input type="checkbox"/>
<b>W-2</b>	<input checked="" type="checkbox"/>	<b>FSET</b>	<input type="checkbox"/>	<b>EA</b>	<input type="checkbox"/>
<b>CF</b>	<input type="checkbox"/>	<b>JAL</b>	<input type="checkbox"/>	<b>JC</b>	<input type="checkbox"/>
<b>RAP</b>	<input type="checkbox"/>	<b>WIA</b>	<input type="checkbox"/>	<b>Other</b>	<input type="checkbox"/> *
				<b>EP</b>	<input type="checkbox"/>
<b>PRIORITY: Medium</b>					

**SUBJECT:** Barrier Screening Tool Update

**CROSS REFERENCE:** Resources on the Barrier Screening Tool website at:  
<http://dwd.wisconsin.gov/w2/bst/default.htm>

**EFFECTIVE DATE:** October 6, 2008

**PURPOSE**

The purpose of this memo is to provide:

1. Updates to W-2 policy concerning the use of the Barrier Screening Tool (BST);
2. New CARES functionality to support the BST policy changes;
3. Revisions to the text of the domestic violence screening tool that is part of the BST; and
4. A reminder about screening participants with Limited English Proficiency.

**BACKGROUND**

An advisory group consisting of W-2 agency representatives, Regional Office staff and program advocates convened in 2006 to begin looking at how W-2 screening and assessment policies and procedures were being implemented by the W-2 agencies and to determine where

improvements could be made to serve W-2 participants more effectively. Through the work of this advisory group, a number of policy and automation changes will be implemented over the next six months including:

1. Revisions to W-2 Manual, Chapter 5, Assessment and Upfront Job Search that will:
  - Incorporate a number of assessment related W-2 Operations Memos;
  - Place more emphasis on tailoring assessment to the needs of individuals; and
  - Clarify responsibilities of the W-2 agencies in gathering assessment information.
2. Release of new W-2 medical assessment forms and guidelines for:
  - Mental health and substance abuse;
  - General medical/physical conditions; and
  - Cognitive and learning disabilities.
3. Analysis of the results of a W-2 Agency assessment survey that was completed in 2007 to learn more about assessment and screening tools currently in use. The goal is to develop a comprehensive screening and assessment tools inventory which W-2 agencies will be able to access as a case management resource.
4. Revisions to the BST policy and automation.

Revisions to the BST are the first of these changes to be implemented. More information about the other changes described above will be forthcoming.

## ***BARRIER SCREENING TOOL POLICY***

### Current Policy

Implemented in 2003, the BST is used to identify the potential presence or risk of a personal barrier to full functioning in an employment setting. The responses to the BST questions provided by each individual assist the FEP in determining if the participant can benefit from a formal assessment by a professional. The formal assessment results, in turn, enable the FEP to make a more informed decision about the participant's W-2 placement, the activities s/he is assigned to and any special services or worksite accommodations that s/he may need. The full BST policy is covered in the W-2 Screening and Assessment Policy document which may be accessed along with other BST related information at <http://dwd.wisconsin.gov/w2/bst/default.htm>. Additional information about the Family Needs portion of the BST was covered in [Operations Memo 03-65](#).

Currently, W-2 policy requires that the BST be offered within 30 calendar days after the initial placement of a participant into a W-2 T, CSJ, Trial Job or Real Work Real Pay (RWRP)<sup>1</sup> placement. The participant has the choice to complete or decline the BST using the [BST Agreement Form](#). The BST is required to be offered only once to each individual during his/her W-2 participation with the following exceptions:

- The participant requests to have the BST re-administered;
- The FEP has reason to believe that re-administering the BST may help identify a barrier that is affecting the participant's ability to work or participate in work training activities;
- The participant's W-2 case has been closed for a period of one year or more, or

---

<sup>1</sup> Real Work Real Pay (RWRP) placement is currently limited to the three agencies which were selected as Real Work Real Pay pilot agencies. The pilot runs from June 1, 2008 through December 31, 2009. The three agencies are PSI, Kenosha, and Marathon.

- The FEP is considering denying an initial 24<sup>th</sup> or 60<sup>th</sup> – month time limit extension.

A W-2 participant placed in W-2 T or CSJ, who is required by policy to complete the BST, may not receive a payment reduction for failing to participate in an assigned activity prior to completing or declining the BST. Functionality in CARES will prevent a payment reduction from being imposed when non-participation hours are entered on WPNH for a time-period when the BST has not been completed or declined in the automated BST application. The full policy on how the BST and formal assessment impacts W-2 payment reductions may be found in [Operations Memo 04-23](#).

#### Policy Changes

The BST must be initially offered during the timeframe between the date a W-2 application is filed with the W-2 agency and no later than 30 calendar days after the initial placement of a participant into a W-2 T, CSJ, Trial Job or RWRP. Completion of the BST does not replace the informal assessment process. The FEP must continue to use the informal assessment process to assist in making W-2 placement decisions.

#### **Example:**

A participant applies for W-2 on January 15. The informal assessment process is completed and her FEP places her in a CSJ on January 25. The FEP has between January 15 and February 24 to complete the BST with the participant.

When offering the BST, the W-2 agency must make the individual aware of child care options that may be used while completing the BST. If requested, the W-2 agency must assist with making the child care arrangements before completing the screening.

If the BST is initially offered and declined by the applicant/participant, the BST must be offered again at six months intervals until such time as the individual completes the BST or is no longer in a paid W-2 placement.

Once the BST has been completed by an applicant/participant, there may be circumstances that warrant offering the BST again at a later date. Examples of these circumstances include:

- The participant requests to have the BST re-administered.
- The FEP has reason to believe that re-administering the BST may help identify a barrier that is affecting the participant's ability to work or participate in work training activities. Examples include, but are not limited to:
  - Behavioral cues that may indicate the presence of a condition or barrier;
  - A low TABE score;
  - A pattern of non-participation without good cause; or
  - Changes in family circumstances.
- The participant's W-2 case has been closed for a period of one year or more.

**There are no changes in the BST policy concerning payment reductions. However, the following language will replace the current BST policy language in order to help clarify expectations:**

When the W-2 agency first places an applicant in W-2 T or CSJ, the W-2 agency may not impose a payment reduction for failing to participate in an assigned activity prior to the individual either completing or declining the BST. Functionality in CARES prevents a payment reduction from being imposed when non-participation hours are entered on WPNH for a time-

period when the BST has not been completed or declined in the automated BST application. The restriction of payment reductions only applies to the first offering of the BST.

### **CARES FUNCTIONALITY**

#### Current CARES Functionality

Currently, if a participant is required by policy to be offered the BST, the BST must be completed or declined within 30 days after the W-2 Begin Date (i.e., initial W-2 placement date) which is set on WPWW.

FEPs receive alerts through the CARES system at the time of initial W-2 placement and 15 days following initial placement, notifying them that the participant must be offered the BST. If the participant has not been offered the BST by the 31st day, an alert is again triggered notifying the FEP that the screening is overdue. New participants who are not offered the BST within 30 days after initial W-2 placement are included in the BST Overdue Report for monitoring by the W-2 Agency and the Regional Office as part of the case review.

If the individual completes or declines the BST prior to the W-2 Begin Date (i.e. initial W-2 placement), CARES will consider the BST record to be invalid and the worker will receive the alerts at initial placement, 15 days, and 30 days following placement notifying the FEP that the participant must be offered the BST. The participant will placed on the BST Overdue Report if a new BST record (completed or declined) is not created by the 30<sup>th</sup> day.

#### CARES Changes

*Policy: The BST must be initially offered during the timeframe between the date a W-2 application is filed with the W-2 agency and no later than 30 calendar days after the initial placement of a participant into a W-2 T, CSJ, Trial Job or RWRP.*

The new CARES functionality will enable a worker to create a completed or declined BST record for an applicant/participant anytime after the CARES Work Programs Referral date is captured. The ACEO/AIJR driver flow will allow workers to refer an individual to Work Programs prior to confirming W-2 eligibility or placing the individual in an employment position on WPWW.

#### **Example:**

A participant applies for W-2 on June 6 and the worker completes the RFA process and establishes a case in CWW. Once the case is established, the worker uses ACEO/AIJR process to refer the individual to WP on the same day. The individual is now open in Work Programs but has not yet been confirmed eligible for W-2 or placed on WPWW, and the worker opens the BST and completes a BST record (CP) for the individual. After completing the informal assessment driver and assigning up-front activities, W-2 eligibility is confirmed and the individual is then placed in CSJ on June 20. Since the BST was completed after the W-2 case was established and the individual referred to WP, the BST requirement is met for this individual.

The current alert system that reminds workers that a BST must be completed no later than 30 days after initial W-2 placement will remain in place. If a completed or declined BST record is not created between the date of referral to Work Programs and the 30<sup>th</sup> day after the initial W-2

placement date, the participant will be placed on the BST Overdue Report for monitoring by the W-2 agency and the Regional Office as part of the case review.

*Policy: If the BST is initially offered and declined by the applicant/participant, the BST must be offered again at six month intervals until such time as the participant completes the BST or is no longer in a paid W-2 placement.*

If the BST is initially declined by the applicant/participant and s/he continues in a W-2 placement, an alert will be generated to the FEP six months following the date that the participant declined the BST. The alert text will read: <BST STATUS DR-OFFER NEW BST>.

The alerts will continue to be generated at six month intervals until such time as the participant completes the BST or s/he is no longer in a W-2 paid placement. Once the BST is completed, even if the worker subsequently offers the BST and the participant declines, no further alerts will be generated.

**Example:**

A participant is placed in a CSJ on April 1. The worker records a Decline to Respond (DR) for the BST on April 5. If the participant remains in a W-2 paid placement and no Completed (CP) BST records are created, an alert will be generated on October 5 notifying the worker that the BST must be offered again to the participant.

### **REVISIONS TO THE DOMESTIC VIOLENCE SCREENING TOOL**

The domestic violence screening tool that is part of the BST has changed based on input from a Department-led workgroup made up of experts from the domestic violence advocacy community. Changes include:

- Adding language to help identify victims of sexual assault; and
- Overall revisions to the questions to make the screening tool more effective.

Effective October 6, 2008, the automated version of the BST will be updated with the new domestic violence screening language. The new domestic violence screening tool has also been translated into Spanish and Hmong. A paper version of the English, Spanish and Hmong domestic violence tools are attached to this memo.

### **SCREENING PARTICIPANTS WITH LIMITED ENGLISH PROFICIENCY**

Workers should be reminded that participants must be made aware of the availability of qualified interpreters to assist in completing the BST with individuals who cannot speak, read, write, or understand the English language at a level that permits them to interact effectively with program service providers.

A Spanish and Hmong translation of the full BST is available in a paper version online at <http://dwd.wisconsin.gov/w2/bst/default.htm>. In some parts of these translated tools, the questions were modified from the English version for cultural relevance. Therefore, it is critical that when an interpreter or a bi-lingual FEP is administering the tool to a Hmong or Spanish speaking participant, s/he is reading the questions word-for-word from the translated tool.

**CONTACTS**

For Policy Related Questions: BWF Regional Office Staff

For CARES Processing Questions: W-2/CC Help Desk

**ATTACHMENTS**

Three Attachments: Paper versions of the new domestic violence screening tool in English, Spanish and Hmong

\*Program Categories – FS – FoodShare, MA – Medicaid, BC+ – BadgerCare Plus, 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.

DCF/DFES/BWF/HH/JK