



**This is a discussion based
interactive training. Please
have your Cameras on and
feel free to interrupt with
questions at any time! 😊**

Person Add

Presenters: Cindi and Melissa



Objective

Person Add



- Answer these questions:
 - When should I add a person?
 - What information is needed?
 - What steps are taken in CWW?
 - Other considerations?

2026

3

Introduction



3 common ways a person add begins:

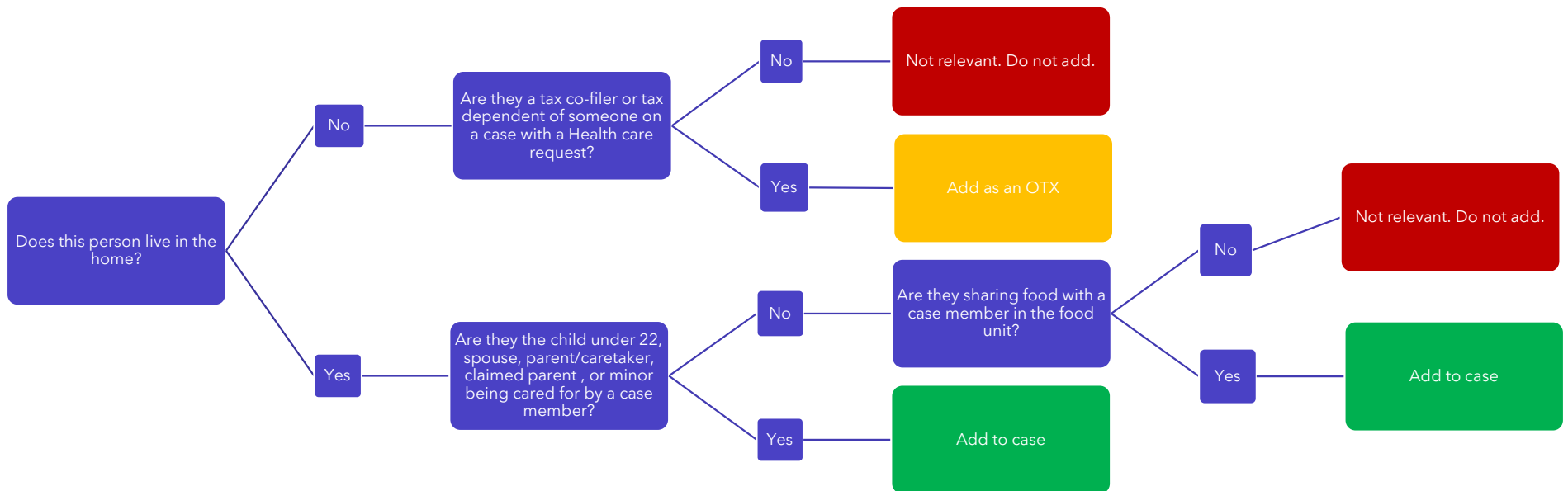
- Change report via ACCESS
- Verbal change via CCC or Lobby
- Written change via documents, applications, or email from another agency.

Question 1

When should I add a person?



Are they relevant to this case?



Note: If you feel you have an exception to these rules, please double check with a lead or supervisor

Question 2

What information is needed?



Person.Add



Information needed

Cannot add without

- Full Name (First and Last)
- Date of Birth

Avoid adding without

- SSN
- Claimed placement information for a minor child
- Relationship to all case members

Can add without and request verification if needed

- School status
- Disability status
- Employment or Income information
- Expense information

If a client does not have the information in column 1, they need to call back or we need to follow up to obtain this information. Household Composition can be pended.

If a client is missing an item in column 2 we should do our best to locate the information in our systems BEFORE adding (Check for other cases/PINs in CWW, check KIDS, etc.) but if we cannot find this information, we should still add the person and request the item(s) needed.


Getting additional information

Information or Documentation

If we don't have enough info to request the correct verification OR we don't require verification we should first attempt to reach the client to clarify. If we cannot or they don't have the information available we should try to pend the gatepost whenever possible.

This will send a questionnaire style notice to the client asking them for more information.

Example for employment:

 Question 1: Is anyone in your home currently employed or on strike? <input type="checkbox"/> Yes <input type="checkbox"/> No

This does mean you may have to request **verification** once the **information** is received.

Verification

If we have information, but it needs to be verified, pend the page/field that needs verification. This will send a notice asking for specific verification. Example for employment:

What?	Who?	Examples*	Program(s)	Due Date
Employment at WALMART including : Expected monthly income before taxes or deductions and number of hours worked per pay period	CAROLYN	<ul style="list-style-type: none">• Pay stubs from the last 30 days• Wage printout• A statement or other document from your employer showing your income and hours worked• If enclosed, the Employer Verification of Earnings form filled out and signed by your employer	BadgerCare Plus	Apr. 03, 2023

*If you do not have any of the examples of proof listed, there are other things you can use. For a complete list of examples, go online to dhs.wi.gov/em/customerhelp or contact us.

Question 3

What steps are taken in CWW?



Person Add



2026

10

Person Add Demo



Scenario

Today is May 10th

Ms. Stake has an open FS and HC case and is calling to report as of April 17th her son Jeremy has moved back into her home. He was previously living with his father who lives nearby and does not have any open benefits in CWW. He attends the local high school and does not have any source of income. Ms. Stake now has primary placement of Jeremy and claims him as a tax dependent every other year. This is her year to claim him. Ms. Stake provides Jeremy's full name, date of birth, and SSN.

Should Jeremy be added? **YES**

Do we have enough information? **YES**

Case Summary and Household Members Pages

What would you like to do?

Workflow Options	Case Maintenance
<input type="radio"/> Continue with Driver / Navigate Through Completed Pages	<input type="radio"/> Reactivate Case
<input checked="" type="radio"/> Add Person	<input type="radio"/> Transition Mainframe Case to Web Case
<input type="radio"/> Process Renewal / Review	<input type="radio"/> Initiate, Resume, or Terminate Simulation
<input type="radio"/> Record New Group Level Program Request	<input type="radio"/> Change Primary Person
<input type="radio"/> Process Group Level Program Request	<input type="radio"/> Make Case Confidential
<input type="radio"/> Process Six-Month Report Form	<input type="radio"/> Transfer Case
<input type="radio"/> Process linked ACCESS application	<input type="radio"/> Begin Intake Interview for Asset Assessment Case

Enter Begin Month for New Data: MM / YYYY

Add Case Comment



Click "Add Person" (Optionally, enter begin month) and click next

Individual Name

*First Name MI *Last Name Suffix
JEREMY STAKE

Additional Information

*Gender: MALE
SSN: 983-54-7123
*Birth Date: 01/17/2006
SSA Verification: C - COMPLETED REQUIREMENTS
*Verification: NQ - NOT QUESTIONABLE

Estimates for Relevance Determination

Age Category: Less than 18 years old
Serves as Alien Sponsor: No
*Does this individual meet any of the following criteria: Yes

Enter Relevant Details

Request pages

Health Care Request Cancel Reset

The following events have occurred:

AE779: PERSON ADD - Update the 'Begin Month' and 'Program Filing Date' in order to run eligibility successfully.

Effective Period

*Begin Month: 05 / 2023 Last Updated: 05/02/2023

Request Details

*Program Filing Date: 05 / 10 / 2023 *Requesting this Program / Subprogram of Assistance? Yes

How far back do you want Health Care? 0

Restrictive Re-enrollment Details

Has any adult member left the household since a restrictive re-enrollment period began?

CAROLYN STAKE 31F PP

*Individual Request: Yes

Reason for Not Requesting: BC+ Contact Date: MM / DD / YYYY

JAXON STAKE 8M SON

*Individual Request: Yes

Reason for Not Requesting: BC+ Contact Date: MM / DD / YYYY

GERALD PARSONS 35M NOT

*Individual Request: Yes

Reason for Not Requesting: BC+ Contact Date: MM / DD / YYYY

JEREMY STAKE 17M

*Individual Request: Yes

Reason for Not Requesting: BC+ Contact Date: MM / DD / YYYY

Enter New Begin Month: MM / YYYY Go

Update ALL **Begin Months** and **Program Filing Dates** to the day the change was reported (or date of birth for a newborn add). This includes programs that are not being requested.

Household Relationship pages

Choose the correct relationship for each household member. Begin month should be the month the change is reported (or birth month for a newborn).

Reference Person
Individual: CAROLYN STAKE 31F PP Last Updated: 08/31/2022

JAXON STAKE 8M SON
 * Jaxon is the: SON - SON of Carolyn, *Effective: 08 / 2022
 * Verification: NQ - NOT QUESTIONABLE
 Jaxon also:
 * Purchases & Prepares Meals with Carolyn Yes
 * Has Legal Custody of Carolyn No
 * Is an Essential person for Carolyn No
 * Is Caring for Carolyn No
 * Is Filling Parental Role for Carolyn No
 * Is LTC Tax Dependent of Carolyn No

GERALD PARSONS 35M NOT
 * Gerald is the: NOT - NOT RELATED of Carolyn, *Effective: 03 / 2023
 * Verification: NQ - NOT QUESTIONABLE
 Gerald also:
 * Purchases & Prepares Meals with Carolyn Yes
 * Has Legal Custody of Carolyn No
 * Is an Essential person for Carolyn No
 * Is Caring for Carolyn No
 * Is Filling Parental Role for Carolyn No
 * Is LTC Tax Dependent of Carolyn No

JEREMY STAKE 17M
 * Jeremy is the: of Carolyn, *Effective: 05 / 2023
 * Verification: of Carolyn
 Jeremy also:
 * Purchases & Prepares Meals with Carolyn No
 * Has Legal Custody of Carolyn No
 * Is an Essential Person for Carolyn No
 * Is Caring for Carolyn No
 * Is Filling Parental Role for Carolyn No
 * Is LTC Tax Dependent of Carolyn No

Relationship dropdown menu:
 FCO - FIRST COUSIN
 FIL - FATHER-IN-LAW
 FRD - FRIEND/NON RELATIVE
 FTR - LEGAL/ADJ FATHER
 GGF - GREAT GRAND-FATHER
 GGS - GREAT GRAND-SON
 GRF - GRAND-FATHER
 GRS - GRAND-SON
 HBR - HALF-BROTHER
 HUS - HUSBAND
 NEP - NEPHEW
 NOT - NOT RELATED
 NQR - NON QUALIFIED REL
 OQR - OTHER QUALIFIED REL
 SOL - SON-IN-LAW
 SON - SON
 STB - STEP-BROTHER
 STF - STEP-FATHER
 STS - STEP-SON
 UNC - UNCLE

dated on or before DD / YYYY Go

Cancel Previous Next

For Minors, remember to list their primary caretaker as "caring for" them

CAROLYN STAKE 31F PP
 * Carolyn is the: MTR - MOTHER of Jeremy, *Effective: 05 / 2023
 * Verification: NQ - NOT QUESTIONABLE
 Carolyn also:
 * Purchases & Prepares Meals with Jeremy Yes
 * Has Legal Custody of Jeremy No
 * Is an Essential Person for Jeremy No
 * Is Caring for Jeremy Yes
 * Is Filling Parental Role for Jeremy No
 * Is LTC Tax Dependent of Jeremy No

Relevance Page

Relevance Results

The following events have occurred:

AE175: You are about to run clearance for the newly added individual(s). Please review the SSN and Birth Date information below and if it is incomplete or incorrect please return to the Household Members page to update it. Please click 'Next' only when you are ready to begin clearance.

Relevant Individuals for Current Case

Please make sure the information below is correct, Individuals who are applying for assistance should provide an SSN or apply for an SSN. Individuals not applying for assistance may choose to not provide an SSN.

First Name	MI	Last Name	Suffix	SSN	Birth Date	Gender	Applying	Cleared	Make Not Relevant
CAROLYN		STAKE		488-48-8424	01/23/1992	Female	Yes	Yes	
JEREMY		STAKE		983-54-7123	01/17/2006	Male	Yes	No	
JAXON		STAKE		998-36-9695	08/02/2014	Male	Yes	Yes	
GERALD		PARSONS		857-36-2541	07/05/1987	Male	Yes	Yes	

Individuals Not Relevant for Current Case

Based on the information provided, it will not be necessary to collect any additional information about the following individuals. The individual information below will be stored as part of this case and can be viewed by visiting the 'Select Other Household Members' page. If any of these individuals wish to apply for assistance at a later time or if there is a change in circumstance, it may be necessary to collect additional information at that time.

First Name	MI	Last Name	Suffix	SSN	Birth Date	Gender	Make Relevant
No data found.							

Add Case Comment

Cancel

Anyone marked as **No** will be run through clearance when you click Next. "Clearance" is CWW checking to see if this person has an existing PIN in the system. Duplicate PINs can cause issues, so it is best to use existing PINs whenever possible.

If the person you are attempting to add appears in the **bottom section**, CWW has determined they are not relevant to this case. Double check that they should be added and that all Household relationships are correctly entered. If you move past this page with them listed in this section CWW will delete them from the case. If you need to override this and add them anyway, Click the arrow that will appear under "**Make Relevant**"

Clearance

Individual Clearance List Reset

Individual Matches

	%	SSN	First Name	MI	Last Name	Suffix	Birth Date	Gender	Alias/ Name Type	Name in CARES is
		983-54-7123	JEREMY		STAKE		01/17/2006	Male		
<input checked="" type="radio"/>	99	983-54-7123	JEREMY		STAKE		01/17/2006	Male	Primary	Same <input type="button" value="Q"/>

Choose the correct **matching** person from the list. If there is no match, click next.

Please note, if a match has at least **92%** you will not be able to move past this page without choosing this match. If more than one match is listed at 92% or more you will need to change some information to lower the match %. Best practice would be to remove 2-3 letters from the last name.

Complete Driver Flow

Finish Driver Flow. Pay close attention to the following pages:

- Permanent Demographics: **Ensure Citizenship/Immigration status is entered correctly. Request SSN if we don't have one.**
- Current Demographics: **Update the Living arrangement and OTX indicator**
- School Enrollment: **Update/Add school info and request verification if needed**
- Benefits Received: **If a person recently received FS in another state, request verification of the closure date. If there is a Foster care or Kinship care relationship, update those fields.**
- Absent Parent Page: **Make sure all legal parents NOT in the home are referred to Child Support. Advise the client of any new referrals when possible.**
- Employment Queries/Employment: **Check for any new/changed employment and request verification if not available in FDSH and agreed upon.**
- Unearned Income: **Check for new/changed CS income, run SOLQ/UIB queries or request verification if needed.**
- Expenses: **Changes to CS or CC expenses?**
- Tax Filing Details: **Update tax filing information and request further clarification if needed.**
- FS WR/ABAWD Info: **Make sure all adults have a page and the info is current.**

Running Eligibility

For FS, **POSITIVE** changes should be effective the calendar month following the change report **NEGATIVE** changes should follow Adverse Action rules. If you run with dates due to a positive change, make sure you check the “Determine Potential FoodShare Supplement” box or no additional benefit will be issued.

For Non-Newborn adds, **POSITIVE** HC changes should be effective the same month the change was reported. **NEGATIVE** changes should follow Adverse Action rules. You will most likely need to run with the date of the change report and possibly additional months depending on Adverse Action

For Newborns, HC should be determined from the date of birth.



Best practice is to start with the oldest month that needs to be run and work your way forward. You should try to confirm one category at a time (FS or HC, etc.). There is no limit to the number of times you can run with dates so it is better to be cautious. Once you are done running with dates you should always run without dates (“open”) to ensure ongoing eligibility is correct.

Running Eligibility

Using our scenario, let's run eligibility. We will start with Health Care:

Initiate Eligibility Cancel Reset


Page Completion Status: All pages are complete, you may proceed to eligibility by clicking the 'Next' button.

Eligibility Status: Based on the changes to the case, you should run eligibility.

What would you like to do?

Run Eligibility Ignore W-2 income and asset tests to allow CMF/+ Placements to begin

Run Eligibility with Date Determine Potential FoodShare Supplement

Effective: / / 

Add Case Comment Cancel Previous Next

In this case, the date reported will be used to run with dates.

Running Eligibility

Confirm Eligibility Cancel Reset

Health Care / CTS Results

Program	Sequence	Benefit Begin Date	Benefit End Date	Benefit Amount	AG Status	Eligibility Status	Reasons	Confirm?
MAGA - BCP - ADULTS	2	05/01/2023	05/31/2023	N/A	OPEN	PASS		No <input type="checkbox"/>
	1	05/01/2023	05/31/2023	N/A	OPEN	PASS		No <input type="checkbox"/>
MAGC - BCP - CHILDREN < 19	2	05/01/2023	05/31/2023	N/A	OPEN	PASS		Yes <input checked="" type="checkbox"/>
	1	05/01/2023	05/31/2023	N/A	CLOSED	FAIL	046	
MAGE - BCP - EXTENSIONS	1	05/01/2023	05/31/2023	N/A	OPEN	PASS	702	
MAGM - BCP - EXTENSIONS (ADULTS)	2	05/01/2023	05/31/2023	N/A	CLOSED	FAIL	608 046	

The **existing** HC programs are open, and a **new** sequence is being added for **Jeremy**. This is what we anticipated so we will confirm HC. To see who is included in each **sequence**, review the “Non-Financial Summary” pages for each sequence:

Non-Financial Summary Cancel Reset

Assistance Group Overview

Assistance Group: **MAGC - BCP - CHILDREN < 19** [icon] Sequence: **2**

Benefit Begin Date: **05/01/2023** Benefit End Date: **05/31/2023**

Determination Date: **05/10/2023**

Results

Assistance Group Status: **O - OPEN** Eligibility Status: **PASS**

Individual Details

Individual	Result	Non-Financial Eligibility Reasons
CAROLYN STAKE 31FPP	FAIL	570 - Individual BC+ eligibility explored in other type of BCP AG
JEREMY STAKE 17M	PASS	
JAXON STAKE 8M	FAIL	570 - Individual BC+ eligibility explored in other type of BCP AG
GERALD PARSONS 35M	FAIL	570 - Individual BC+ eligibility explored in other type of BCP AG

Running Eligibility

In this scenario we do NOT need to run with dates for FS as today is May 10th, and June is both the effective month for our FS change AND the month CWW is currently running. We will now run without dates and confirm:

Initiate Eligibility

Page Completion Status: All pages are complete, you may proceed to the next page.

What would you like to do?

Run Eligibility Igr
 Run Eligibility with Date De

Effective: MM / DD / YYYY

Add Case Comment

Confirm Eligibility

Cancel Reset

Health Care / CTS Results								
Program	Sequence	Benefit Begin Date	Benefit End Date	Benefit Amount	AG Status	Eligibility Status	Reasons	Confirm?
MAGA - BCP - ADULTS	2	06/01/2023		N/A	OPEN	PASS		Yes <input type="checkbox"/>
	1	06/01/2023		N/A	OPEN	PASS		
MAGC - BCP - CHILDREN < 19	2	06/01/2023		N/A	OPEN	PASS		
	1	06/01/2023		N/A	DENIED	FAIL	046	
MAGE - BCP - EXTENSIONS	1	06/01/2023		N/A	OPEN	PASS	702	
MAGM - BCP - EXTENSIONS (ADULTS)	2	06/01/2023		N/A	CLOSED	FAIL	608 046	

FoodShare Results								
Program	Sequence	Benefit Begin Date	Benefit End Date	Benefit Amount	AG Status	Eligibility Status	Reasons	Confirm?
FS - FOODSHARE	1	06/01/2023		\$921.00	OPEN	PASS		No <input type="checkbox"/>

Child Care Results								
								Yes <input checked="" type="checkbox"/>

A large iceberg floating in the ocean. The tip of the iceberg is visible above the water surface, while the much larger, jagged base is submerged underwater. The sky is blue with some clouds, and the water is a deep blue. The text "Tips and Work-arounds" is overlaid in white on the right side of the image.

Tips and Work-arounds

Question 4

Other considerations?



Person Add



2026

24

Other things you may need to check at Person Add

- Other cases

Make sure you check if the person you are adding is included on another case. Update and case comment on ALL cases.

- KIDS

Check to see if the new person pays or receives child support, or if there have been changes to an existing member's child support.

- ECF

If the case is pending or needs more information, check if current verification is available in ECF.

- Other state agencies

If the new person recently moved to WI you may need to contact their previous state to verify they are no longer receiving benefits in another state. Please follow your local agency process, or use the national directory listed under desk aids on the capital consortium website to contact the previous state yourself. Either way, make sure to case comment and follow up to update the case once information is received.

A full-page background image showing a climber in a red jacket and blue helmet standing on a rocky mountain peak. The climber is holding a rope and has their arms outstretched. The sun is rising behind the climber, creating a bright starburst effect. The background features snow-capped mountain ranges under a clear blue sky.

Questions?