**This desk aid should be used as a guide when making case comments.**

* **What is being processed:** change, renewal, intake, SMRF, etc.
  + Select the correct comment type and “Flag as Important” if appropriate
* **How the information was received: ACCESS, mail, phone/SCC, in person**
  + Include the ACCESS tracking number, when applicable and date received
  + When processing an application/renewal, specify the program being applied for/renewed
  + If a phone interview is being conducted, state that the customer agreed to complete the interview by phone
  + If the action on the case was generated by an SCC or outbound call, document what information was verified by the client, ex: Name, Address, Phone, Case Number, SSN etc
* **Household Composition**
  + Include relationships and who is requesting benefits
  + For FoodShare, state who purchases and prepares meals together/separately
  + For BC+, state who files taxes and if dependents, and which ones, are claimed
* **Demographic Information**
  + There may be times when it is necessary to explain how citizenship, identity or WI residency have been verified, **especially** when there is no documentation in ECF
  + Any other important information that is **relevant** to the case should also be mentioned in case comments such as: marital status (if questionable), migrant farm worker, fleeing felon or in violation of probation/parole, foster care status, etc.
* **Benefits Received**
  + Mention if the customer receives any other benefits listed on the Benefits Received Page such as: FS in another state, tribal benefits, SSI payments, inpatient/outpatient drug or alcohol treatment, etc.
* **Non-Financial Information**
  + Any non-financial information reported by the customer should be put in case comments examples: pregnancy, disability, MAPP request, drug felon, Youth Exiting Out-of-Home Care, Absent Parent info(if relevant to case information or why action was taken on the case), etc.
* **Income**
  + Include who is employed, employer name, average hours, rate of pay, pay frequency and pre-tax deductions
  + If a job recently ended, include the reason and if there is good cause or not for quitting the job and whether or not there is a sanction event
  + If FDSH wages are available mention why they were or were not used
  + For Self-Employment state whose business it is, the business name/type, business start date, if a significant change occurred (what the change is and when it happened), hours worked, if SEIRFS/taxes are requested
  + When processing EI/EVFE, include the date the verification was received.
  + Detail any other income received, who receives it and the source. If Child Support is received, explain how the average was obtained
* **Deductions**
  + Any BC+ tax deductions and who has the deduction
  + Any other expenses (medical, dependent care, support, shelter, utility, etc.)
* **Other**
  + Any other important information
  + ABAWD/Work Registrant status/exemptions
  + Scripts that were read
  + Telephonic signature interaction ID, if applicable
  + Case status and programs pending/opening. Due date, if applicable.
  + FS Clock-number of TLBs
* **Tips**
  + Do not use personal pronouns like I or we, enter “Wages found on FDSH” instead of “I found wages and FDSH” or enter “Income page updated” instead of “I updated the income.”
  + Do not enter medical information in case comments, enter “Luna called to report that she is unable to work due to medical reasons” instead of “Luna called to report she had her gallbladder removed so she is off work” or enter “Nick states his wife, Melissa, is unable to work due to medical reasons.” Instead of “Nick states his wife, Melissa, can’t work because she had a nervous breakdown.”
  + Use the Navigation Menu/Driver Flow as an outline for case comment organization.
  + Comments must be factual, professional and respectful.
  + When noting information received from third party sources, be sure to include the contact name, phone number, date and time of the contact, relationship to the customer and information collected.
* **Examples**
  + SCC-Verified client’s name, address, phone and SSN/case number. Andrea called to report new EI. Built EI page. Andrea reports her new EI at The Cat’s Meow started 5/1/2020 and she will receive her first paycheck on 5/15/2020. She reports receiving $9/hour at 20 hours per week and is paid bi-weekly. No pre-tax deductions reported. Ran eligibility. MAGS and FS pend for EI DD 5/12/2020
    - Select comment type: Change
  + Received EVFE on 5/3/2020 for Andrea at The Cat’s Meow. EVFE states Andrea works 40 hours per week at $9/hr. Paid bi-weekly. No pre-tax deductions reported. Updated EI page. Ran eligibility MAGS is denied as of 6/1/2020 as Andrea is over income. FS decreases to $16 as of 6/1/2020 due to increased income.
    - Select comment type: General
  + Paper SMRF received 5/4/2020. Joann reports the household remains herself and her son, James. Rent remains $550. Joann reports paying gas, electric, water and phone, no changes reported. Joann reports no changes to her EI, she still receives $10/hr at 25 hours per pay period. Joann reports no change to other income, no other income is being received. Ran eligiblity MAGA, MAGC and FS remain open.
    - Select comment type: Renewal/Review/SMRF

Reference Process help 46 for more information