**Southern Consortium Call Center**

***Serving Crawford, Grant, Green, Iowa, Jefferson, Lafayette, and Rock Counties***

**Process Guide**



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1. **One Touch Model**

One Touch philosophy of the Southern Consortium means that we process the case from beginning to end with the client on the phone. If the customer needs to be put on hold during the call, workers should check in with the customer every three minutes. The following are items included in the one-touch model:

**Completion of all Discrepancies on the Case:**

*SWICA Specific SCC process*

* If the discrepancy is a SWICA, regardless of county of residence, you would review the information with the client and update the discrepancy.
	+ If the customer provides you with updated income information, enter the changes and pend for ongoing benefits. Update the discrepancy to indicate that the case is PENDING FOR ONGOING ELIGIBILITY and enter detailed comments.
	+ If the customer provides you with enough information to determine that the change was not required to be reported, resolve the SWICA using RESOLVED- NO ELIGIBILITY ISSUE and enter detailed comments.
	+ If the customer provides you with new information that closes benefits without needing verification, resolve the SWICA using RESOLVED- ELIGIBILITY ISSUE and enter detailed comments. Do NOT check the follow-up action for OP/FRAUD box.  If there appears to be clear intent for a potential IPV, complete a BRITS claim referral.
	+ If you are working on a call that has attached income documents to resolve a SWICA, process the information to the case and resolve the SWICA for ongoing benefits. *If the new information lowers or closes benefits,* do NOT check the follow-up action for OP/FRAUD box.  If there appears to be clear intent for a potential IPV, complete a BRITS claim referral.
* Further information will be provided by your individual county on a process for determining if an overpayment exists following SWICA resolution.
* Remember that the OP/FRAUD piece is not the goal of resolving a SWICA.

**Completion of ALL action items (alerts) on the case**

* If you are unsure of how to complete the action item, you can click on the magnifying glass next to the alert listed in the action items for help text.

**Completion of any requests or renewals for Medical Assistance, CTS and/or FoodShare, as well as Telephonic Signature for SMRF**

**Completion of all documents on the case**

Agents are **NOT** expected to process any Self-Employment including SEIRFs during Call Center hours

Agents are **NOT** expected to process any Medical Expenses documents during Call Center hours

Agents are **NOT** expected to process any LTC Undue Hardship during call center hours

Those documents will be processed by the local county agencies. Please advise the client that their documents/verifications will be processed in the order they were received within a 10 day period.

1. **Answering and Ending a Call**

****Smile! A smile in your voice can help make the call proceed more smoothly.

***SCC Greeting:***

***Hello, Southern Consortium Call Center, this is (your first name). May I please have your case number or social security number?***

***\*\*\*You do need to give your first name\*\*\*\****

Verify who you are speaking with (i.e., name, SSN or case number, and date of birth if questionable)

Hi (customers first name), can you verify your date of birth? SSN?

Confirm caller’s address and phone number. Update address and phone if it has changed.

How may I help you today?

End the call by summarizing what actions were taken and by asking if they have any further questions.

1. **Addresses**

There are certain addresses that agents need to be mindful of prior to updating a case. The following are addresses there are known issues with. Agents should attempt to verify that the address and phone number is correct when callers are completing a change on their case to ensure the information is accurate.

|  |
| --- |
| Rock Valley Community Programs- 203 West Sunny Lane Road, Janesville, WI. 608-741-4510We received clarification that certain individuals at the Rock Valley Community Program in Rock County can be eligible for FoodShare benefits. When these individuals apply, we need to ask what program they are in.There are 3 programs: |
| Harper’s Place:15 bed CBRF for Mental Health Crisis Stabilization. (INELIGIBLE) |
| Residential Re-entry Program:115 bed CBRF corrections program transitioning offenders back into the community from prison settings or those serving Alternatives to Revocation (ATR) or other probation/parole violations. (INELIGIBLE) |
| Veteran’s Homeless Shelter:24 studio apartments for homeless Veteran’s able to house up to 48 homeless Vets at one time for up to 24 months at a time. (ELIGIBLE)Only the individuals residing at the Veteran’s Transitional Living Center are eligible for FoodShare under the transitional living policy FSH 3.2.1.3.2.  They would be considered homeless and can receive benefits for FoodShare. |

**Beloit Domestic Violence**

2185 Shopiere Rd, PO Box 476, Beloit WI 53511.

Clients residing on this address should be able to receive Food Share.

**614 Broad Street Beloit, WI**

The post office does not recognize the fire numbers for the Broad Street address and frequently returns mail if addressed incorrectly.

The address is often listed as: 614 Broad Street, #214 Beloit, WI 53511

The correct listing of this address is: 614 Broad Street, #14 2nd Floor Beloit, WI 53511

**Watertown, WI**

ZIP code of 53094 is in Jefferson County. ZIP code of 53098 is in Dodge County.

1. **Safe at Home**

Safe at Home is a statewide address confidentiality program administered by the Department of Justice that provides those who fear for their physical safety with a legal substitute address to be used for both public and private purposes. Safe at Home allows participants to use and receive mail at an assigned address in lieu of their actual address and then forwards the mail to the participants' actual address free of charge.

Each county has appointed one person and a backup to process all confidential Safe at Home cases in their agency. Please refer any Safe at Home client to the primary assigned person for case processing. Refer to Process help Chapter 77 for processing instructions.

|  |  |
| --- | --- |
| **Crawford**Mendy Chesebro, back up Miranda LudvikWorker Number: XCR048 | **Jefferson**Melissa Jung, backup Meghan HarrisWorker Number: XJE164 |
| **Grant**Nicole Huber, backup Cece Fishnick Worker Number: XGT115 | **LaFayette**Crissy Black, backup Missy ZasadaWorker Number: XLF057 |
| **Green**Amie Ballard, backup Laci BainbridgeWorker Number: XGR074 | **Rock**Kathy King, backup Mysi GenzWorker Number: XRO589 |
| **Iowa**Teresa Bahr, backup Kate ChambersWorker Number: XIA035 |  |

1. **General Guidelines-Client Registration**
* When creating an RFA, use the 50 caseload for all cases. If it is open for W2 or W2 has closed in the last 30 days, please use the 55 caseload.
* Any agent, regardless of county, can process new applications and renewals with the exception of Child Care.
* If a client has missed a scheduled interview and calls back to SCC, any agent regardless of county is able to complete the interview with the exception of Child Care interviews.
* When scheduling the appointment, mark YES for FS or CC on the appointment screen to ensure the proper notices go out if they miss their interview. (If they are applying for FS/CC)
* **PLEASE NOTE**: Be sure to schedule using the RFA number and not the case number, otherwise it will not fall of the FSOD tool.

* New Requests for Assistance (RFA):
	+ Complete all the information on the RFA screens
	+ Complete the interview unless the client is not able to do it at that moment. Schedule an intake appointment if they are unable to complete the interview. If the client wants to call back, please explain an appointment will still be scheduled. Please schedule the appointment 5 business days out to allow time for mailing.
	+ If there is an existing case, make sure to comment the appointment time/date on the case as well as the RFA.
	+ Complete the telephonic signature.
	+ If a call disconnects in the middle of the RFA:
		- Make one attempt to call the client back.
		- Make note of the RFA number
		- Withdraw the RFA at the end of the day if the client did not call back and finish the RFA process.

**Scheduling/Assigning Chart**

Intake, New Program Request (NPR), and Renewal Scheduling Chart

**For All Counties:**

1. Next 3 business days – YES
2. Time: ANYTIME
3. Select Activity Type:
* IF - Intake in Office
* IP – Intake via Phone
* EO – Eligibility Review in Office
* RP – Eligibility Review via Phone
* IH- HealthCare Only via Phone \*manual appt. notice must be sent
* OH-HealthCare Only in Office \*manual appt. notice must be sent
1. Please **DO NOT** schedule same day appointments.
2. Schedule New Program Requests next available but assign the RFA to Ongoing Worker in the case.
3. Assign new RFA’s based on the county of residence and the programs they are applying for.

NOTE: Make sure that when you assign a new RFA to the county of residence that you update the County/Tribe to match with the household County of Residence as this field defaults to the County of Residence of the agent processing the application. This tends to be error prone when dealing with an address other than the agent’s county of residence.

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| --- | --- | --- |
|  | **Intakes & New Program Requests** | **Reviews** |
| **Crawford****12** | Activity types: IF, IP, IH, OH**Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice**Search by: County: CrawfordNarrow Further?: YES – FAMILY, EBD, LTC, or CC TeamSearch by: **Next Available****Assign new RFAs to: Family, EBD/LTC, and CC cases to XCRV01** | Activity types: EO, RP, IH, OHNarrow Further?: YES – FAMILY, EBD, LTC or CC Team Search by: **Next Available****Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice** |
| **Grant****22** | Activity types: IF, IP, IH, OH**Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice**Search by: County: GrantNarrow Further?: YES – FAMILY, EBD, LTC, or CC TeamSearch by: **Next Available****Assign new RFA’s to: Family and CC- XGTV01, EBD- XGTV02, LTC- XGTV03** | Activity types: EO, RP, IH, OHNarrow Further?: YES – FAMILY, EBD, LTC, or CC Team Search by: **Next Available****Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice** |
| **Green****23** | Activity types: IF, IP, IH, OH**Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice**Search by: County: GreenNarrow Further?: YES – FAMILY, EBD, or CC TeamSearch by: **Next Available*****Assign new RFA’s to:* Family- XGRV01, EBD- XGRV02, LTC- XGRV04, and CC XRGV03** | Activity types: EO, RP, IH, OHNarrow Further?: YES – FAMILY, EBD, or CC Team Search by: **Next Available****Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice** |
| **Iowa****25** | Activity types: IF, IP, IH, OH**Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice**Search by: County: IowaNarrow Further?: YES – FAMILY, EBD, LTC, or CC Team Search by: **Next Available*****Assign new RFA’s to:* Family- XIAV01, EBD XIAV02, LTC- XIAV04, and CC XIAV03** | Activity types: EO, RP, IH, OHNarrow Further?: YES – FAMILY, EBD, LTC, or CC Team Search by: **Next Available****Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice** |
| **Jefferson****28** | Activity types: IF, IP, IH, OH**Note: IH, OH are healthcare only appts.  When these codes are used, the customer must be sent a manual appointment notice**Search by: County: JeffersonNarrow Further? : YES – FAMILY, EBD, BILINGUAL or CC Team Search by: **Next Available**Only Schedule Spanish Speaking clients with the Bilingual Team (EBD, CC, FS, BC+, CTS)***Assign new RFA’s to:* Family and EBD- XJE157, LTC- XJEV04, Spanish-XJEV03 and CC XJEV05** | Activity types: EO, RP, IH, OHNarrow Further?: YES – FAMILY,BILINGUAL, EBD, FC NH WAIVER or CC Team Search by: **Next Available****Note: IH, OH are healthcare only appts.  When these codes are used, the customer must be sent a manual appointment notice** |
| **Lafayette****33** | Activity types: IF, IP, IH, OH**Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice**Search by: County: LafayetteNarrow Further?: YES – FAMILY, EBD, LTC, or CC Team Search by: **Next Available*****Assign new RFA’s to:* Family- XLFV01, EBD- XLFV02, LTC- XLFV04, and CC XLFV03** | Activity types: EO, RP, IH, OHNarrow Further?: YES – FAMILY, EBD, LTC, or CC Team Search by: **Next Available****Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice** |
| **Rock****53** | Activity types: IF, IP, IH, OH**Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice**Search by: County: RockNarrow Further? : YES – FAMILY, EBD, LTC, CC Team, or Spanish TeamSearch by: **Next Available**EBD: must include EBD MA requestOnly Schedule Spanish Speaking clients with the Spanish Team (EBD, CC, FS, BC+, CTS)***Assign new RFA’s to:* Family, EBD, LTC, AND CC TO XROV01** | Activity types: EO, RP, IH, OHNarrow Further?: YES – FAMILY, EBD, LTC, Spanish Team, or CC Team Search by: **Next Available****Note: IH, OH are healthcare only appts. When these codes are used, the customer must be sent a manual appointment notice** |

1. **Special Accommodations Process-SCC**

When a customer schedules an appointment and needs a special accommodation (examples may include the need for a wheelchair, sign language interpreter, the use of language line, etc.):

* The agent scheduling the appointment will email the county of residence to notify them that an accommodation needs to be arranged for the appointment.
* The appointment will be scheduled out 5 business days so that there is enough time for the accommodation to be arranged.
* If the county of residence needs more time to arrange accommodations, they will reach out to the customer to reschedule.

County contacts listed below:

|  |  |  |
| --- | --- | --- |
| County | Contact Name | Email |
| Crawford | Primary - Mendy Chesebro | mchesebro@co.crawford.wi.gov |
|  | Back up – Teresa Beers | tbeers@co.crawford.wi.gov |
| Grant | Primary - Cece Fishnick | cfishnick@co.grant.wi.gov |
|  | Back up – Nikki Huber | nhuber@co.grant.wi.gov |
| Green | Primary – Laci Bainbridge | lbainbridge@gchsd.org |
|  | Back up – Amie Ballard | aballard@gchsd.org  |
| Iowa | Primary - Kate Chambers | kate.chambers@iowacounty.org |
|  | Back up – Teresa Bahr | Teresa.bahr@iowacounty.org |
| Jefferson | Primary - Kathy Busler | KathleenB@jeffersoncountywi.gov |
|  | Back up - Jessica Schultze | JessicaSc@jeffersoncountywi.gov |
| Lafayette | Primary - Missy Zasada | mzasada@lchsd.org |
|  | Back up – Crissy Black | cblack@lchsd.org |
| Rock | All Supervisors | RockESS@co.rock.wi.us |

1. **Rescheduling Appointments **

 If the client calls in prior to their appointment date you can offer to complete the interview “on demand” regardless of whether an appointment has been scheduled. If the client declines the interview, then offer to re-schedule the appointment. If you complete the interview, please remember to cancel the existing appointment.

1. **Language Line**

The phone number to Language Line, for Southern Consortium call center agents only, is **1-866-874-3972**. Our code is: **531347**.

REMINDER: Be sure to case comment the Interpreter ID number of the language line interpreter.

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To report problems with interpreters and calls to the Language Line service Agents must go to [www.languageline.com](http://www.languageline.com) and under Customer Service, click on “Provide Feedback”. This site collects the issues and routes them to several people, including our representative. The interpreters are then talked to about the complaint. You must include the date and time of the call, but anything else you can offer is appreciated. They find the call by searching under our account number. You should develop the habit of writing down the interpreter ID number for every call you have. Please also use this same website to report a job well done by the interpreter. All comments are shared with the interpreters.

If Language line takes more than one minute, and you have dead air (don’t hear any of their recorded messages), hang up and call back. It means the call has been disconnected. Their target is to have a Spanish interpreter on the line within 30 seconds.

**9.** **Transferring Calls**

When transferring to a different Queue:

* While on the call, Select “Consult.”
* Type to 5-digit code for the Queue you are transferring to. Filter C10
* Click the Phone Icon to send the call to the queue.

**SOUTHERN QUEUE TRANSFER CODES**

|  |  |
| --- | --- |
| Name | Route Point (RP) |
| Southern\_Transfer\_Gen | 51123 |
| Southern\_Transfer\_Esp | 51124 |
| Southern\_Transfer\_EBD | 51127 |
| Southern\_Transfer\_LTC | 51128 |
| Southern\_Transfer\_CC\_Rock | 51129 |
| Southern\_Transfer\_CC\_Jefferson\_County | 51130 |
| Southern\_Transfer\_CC\_Grant\_County | 51131 |
| Southern\_Transfer\_CC\_Green\_County | 51132 |
| Southern\_Transfer\_CC\_Iowa\_County | 51133 |
| Southern\_Transfer\_CC\_Crawford\_County | 51134 |
| Southern\_Transfer\_CC\_Lafayette\_County | 51135 |

When a caller is from another consortium:

* **DO NOT transfer the call to the consortium of residence via Genesys.**
* Provide the caller with the phone number for the consortium of residence.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Bay Lake** | **Capital** | **Central** | **East Central** | **Great Rivers** | **Milwaukee** |
| Brown, Door, Marinette, Oconto, & Shawano | Adams, Columbia, Dane, Dodge, Juneau, Richland,& Sauk | Langlade, Marathon, Oneida, & Portage | Calumet,Green Lake, Kewaunee, Manitowoc, Marquette, Outagamie, Sheboygan, Waupaca, Waushara, & Winnebago | Barron, Burnett, Chippewa, Douglas, Dunn, Eau Claire, Pierce, Polk, St. Croix, & Washburn | Milwaukee |
| **888-794-5747** | **888-794-5556** | **888-445-1621** | **888-256-4563** | **888-283-0012** | **888-947-6583** |
|  |  |  |  |  |  |
| **Moraine Lakes** | **Northern** | **Southern** | **Western** | **WKRP** |
| Fond du Lac, Ozaukee, Walworth, Washington, & Waukesha | Ashland, Bayfield, Florence, Forest, Iron, Lincoln, Price, Rusk, Sawyer, Taylor, Vilas, & Wood | Crawford, Grant, Green, Iowa, Jefferson, Lafayette, & Rock | Buffalo, Clark, Jackson, La Crosse, Monroe, Pepin, Trempealeau, & Vernon | Kenosha & Racine |
| **888-446-1239** | **888-794-5722** | **888-794-5780** | **888-627-0430** | **888-794-5820** |

1. **Cases Processes**

**Case Comments:** Case comments are important to ensure continuity across all counties, agents, and ongoing workers.

Agents will:

* Document in case comments every call.
* Start every case comment with “SCC:”
* Change the comment type to the appropriate comment type when necessary to trigger the appropriate alert to ongoing workers. (Ex. Fraud, Change, Discrepancy, General, Intake, Renewal/SMRF)
* Do **NOT** put case worker, agent or supervisor name in comments. Use the worker, agent or supervisor XID number.
* Use only approved abbreviations from the Approved Abbreviations Desk Aid

**Confidential Cases:**

* Individuals with confidential cases are unable to use the call center to report changes.
* Do NOT refer them to ACCESS as they are unable to use it.
* An e-mail should be sent to the local county with the case information. The local county will follow up with the assigned caseworker.
	+ Crawford
	+ mchesebro@co.crawford.wi.gov
	+ changecenter@co.crawford.wi.gov
	+ Grant

 cfishnick@co.grant.wi.gov

 nhuber@co.grant.wi.gov

* + Green

lbainbridge@gchsd.org

esgroup@gchsd.org

* + Iowa

Kate.chambers@iowacounty.org

Teresa.bahr@iowacounty.org

* + Jefferson

JessicaSc@jeffersoncountywi.gov

KathleenB@jeffersoncountywi.gov

* + Lafayette

 familyteam@lchsd.org

* + Rock

 rockchangecenter@co.rock.wi.us

**Newborn Adds:**

* Newborn adds may be started through HP central processing or customer contact. Agents shall finish a baby added centrally if the parent calls to report the birth. Agents shall add newborns to cases for W2 recipients as well. Follow Process Help 3.1 for adding newborns to cases.

**Immigrants****:**

* Best Practice
	+ Query the social security number of the child listed on the application.
	+ Be sure to input the applicant’s name, as it is already known in the system so the PINs link correctly and reduce error due to duplicate cases being created.

Policy Reference’s: BCH 4.3 MEH 7.3 FSH 3.12.1

**Estate Recovery:**

* Payments to estate recovery should be taken to the local office.
	+ If the individual is under age 55, the check needs to be written out to the local agency (i.e. Crawford County).
	+ If the individual is over age 55, the check needs to be written out to DHS.  Agents at the local level will need to review the case and contact estate recovery if appropriate.

Note:  Local agencies do not accept payments for SSI MA individuals.  We can only accept payments for those individuals we administer benefits for.

**Pre-Payment of Deductibles**

* Pre-payments of deductibles should be taken to the local agency.

**Good Cause Claims**

* Any Good Cause Claims should be processed by the county of residence. An email can be sent to the supervisor/s of that county. Please put Good Cause Claim in the subject line of the email.

**Replacement FoodShare Benefits**

* Agents should follow the one-touch model and process any requests for replacement issuance for destroyed food.  This includes processing the form F-00330 Request for Replacement FoodShare Benefits and entering a supplement if needed.  For Emergency Replacement FS only please email the local office supervisor/s to review the supplement and expedite its issuance.  Please put Emergency FS Replacement AUX in the subject line.
1. **Program Specific Guidelines/Information**

**BadgerCare/Medicaid**

* Complete an RFA.
* Collect the telephonic signature.
* Process the application or schedule an appointment for an interview in lieu of application.
* If an application is requested to be mailed, do not create an RFA.
* If they complete the telephonic signature and then request a paper application, document the request on the RFA, that they declined the interview, and mail the application. Assign to the local office for processing.
* Use the Health Care program request for all medical assistance programs except Family Planning.
* If an EBD individual is applying for healthcare, you must request MSP as well unless they decline to apply for it. Case comment if they decline.
* Medicare Premium Assistance programs can have a telephonic signature.

**Emergency MA Requests**

* + When we receive a request for Emergency MA for an individual who is a non- citizen childless adult, we are required to follow the DDB process for a disability determination.  The case should be processed as follows:
		- Process the application and pend for the appropriate disability documents and status (like usual, MADA, ADDD, etc.) and any verification needed.
		- Q? for Immigration status on the immigrant/refugee page to pend for status.
		- Once all verifications are received and the case updated, continue to pend for Immigration and disability until the due date for the application approaches.
		- When disability Documents come in, manually mail the documents to the DDB.
		- On the verification due date, update the immigration status and fail the case for non-financial eligibility to confirm out of intake mode.  Suppress the denials.
		- Repend the case for immigration status and disability and extend the due date to wait for Disability determination
		- Once a response is received from the DDB, we can take action to certify or deny based on the disability determination received.  Manual notices should be sent.
			* Cases with a manual DDB request may not trigger an approval or denial alert in CWW.   The process for these cases will be as follows:
				+ Once the red folder is received, it will go to the front desk.
				+ The front desk will scan the cover page (On Left) and the approval or denial letter (usually the first two pages on the right) as SCAN FIRST to attach to the case.  The remaining information in the folder can be scanned as process first.
				+ The worker will process the documents when visible on the case to send the appropriate manual Notice of Decision approval or denial to the individual.
				+ Please make sure the MAID for any Emergency MA certifications is included in the manual notice of approval.
				+ If the case is denied, please be sure the manual negative notice gives the correct denial reason of not being determined disabled.  (The CWW notice only displays the denial reason for citizenship)

Presumptive Disability:

|  |
| --- |
| Process at a Glance |
| 1. To prevent Medicaid from automatically being certified as of the first of the month, update the disability to N to fail the first month of eligibility (and any backdated months) in CWW.
2. Open Medicaid effective for the next/ongoing month after the initial partial month by entering a future Begin Month on the Disability Page and updating the Presumptive Disability information.
3. Run eligibility and confirm.
4. Manually certify the initial partial month of eligibility with the correct begin date using the Medicaid/BadgerCare Plus Eligibility Certification form ([F-10110](https://www.dhs.wisconsin.gov/forms/index.htm?search=F-10110&division=All)).
5. Suppress the incorrect CWW generated notice and send the member a manual Notice of Decision.
6. After confirming eligibility, navigate back to the Disability Page and update the case to pend for a formal disability determination
 |

Any AE case would be certified through the end of the emergency.  You will need to use their judgement on this.  If someone is applying that has cancer and treatment is expected to continue through the year, we would certify for the full year.  If they broke their leg and recovery is expected in 3 months, we would certify for 3 months.  If they were in the hospital and have been released, coverage could be through the time period of the hospitalization.

**** **Childcare**

**Phone number to activate their Child Care parent pay cards 1-877-201-7601**

Open cases requesting childcare or a childcare only request:

* Create an RFA.
* Collect a telephonic signature.
* Complete the RFA and schedule an appointment with the Child Care Team from the County of Residence. Please schedule the appointment for 5 business days out to allow time for mailing. If the customer is on the phone with you and you are giving verbal notice of the appointment time, it is not required to schedule the appointment out 5 business days.
* If there are no appointments available within 5 business days, an email should be sent to the Child Care team letting them know that an appointment needs to be scheduled. If the client specifically requests an appointment outside of the 5 business days, please schedule the appointment and document this in case comments.
* If this is a Rock Child Care case, you can ask the client if they would like to be transferred to the Child Care line for an on-demand interview and advise that there may be a wait time.
* If a telephonic signature is declined, offer to mail the “Wisconsin Shares Child Care Registration” form or refer to ACCESS to apply.
* Document in case comments if the telephonic signature was refused and if form was mailed.

New request for childcare, no open case, and requesting multiple programs:

* + Create an RFA for all programs requested. Collect a telephonic signature.
	+ Complete the RFA and schedule an appointment with the Child Care Team from the County of Residence. Please schedule the appointment for 5 business days out to allow time for mailing. Document actions in case comments. If the customer is on the phone with you and you are giving verbal notice of the appointment time, it is not required to schedule the appointment out 5 business days.
	+ Process the request for any other programs except for Child Care. Pend for the Child Care interview.
	+ If this is a Rock Child Care case, you can ask the client if they would like to be transferred to the Child Care line for an on-demand interview and advise that there may be a wait time.

Childcare Renewal

* Schedule an appointment with the Child Care Team from the County of Residence. Please schedule the appointment for 5 business days out to allow time for mailing. Document actions in case comments. If the customer is on the phone with you and you are giving verbal notice of the appointment time, it is not required to schedule the appointment out 5 business days.
* Complete any renewal for other programs that are due for a renewal (HC/FS, etc.)
* If this is a Rock Child Care case, you can ask the client if they would like to be transferred to the Child Care line for an on-demand interview and advise that there may be a wait time

Open cases with open childcare:

* Refer callers requesting a change to their authorization (hours or provider) that is not due to a change impacting the income on the case to the CC line of their respective county of residence.
* Refer callers with questions about their authorization to the CC line of their respective county of residence.
* Agents will make the changes on the case and request verification if needed and discuss continuity of care for CC needs.
* ****Agents will process the verification once received and email the Child Care team of the county of residence. The Child Care team will update the authorization.

Childcare End of Employment:

* Update the case with the reported changes
* Do not change the request for childcare or childcare activity to NO.
* Send an email to the CC team for the respective county of residence that the employment has ended and been updated.

**FoodShare**

* Offer on demand interview (include all ways to apply)
* Create an RFA
* Collect the telephonic signature.
* Process the application

For new requests or cases closed more than 30 days:

* Create the RFA
* Process the application, if client is not able to process the application at the time, offer the client to call back when he/she has time to process the application or offer to schedule an appointment.

For new requests on open cases:

* Complete the interview unless the client is not able to do it at that moment. Schedule an intake appointment if they are unable to complete the interview.
* If the client wants to call back, please explain an appointment will still be scheduled. Please schedule the appointment 5 business days out to allow time for mailing. If the customer is on the phone with you and you are giving verbal notice of the appointment time, it is not required to schedule the appointment out 5 business days.

New Case Completion:

* Complete an RFA and send an email to someone to confirm the case within your agency.
* The worker that confirms the case should make a case comment that they confirmed the case for XID123
* Check to see if they have had a card before. If they are a prior card holder, please refer to QUEST to have the card issued.
* **IF** the client requests a vault card, you should refer them to their local agency.

**Note: Rock County only issues vault cards between the hours of 8-11:30 am and 1:30-4:00 pm.**

* If a drug test is needed, please refer to the Drug Felon section below for more information.

Pending a FS application for interview:

**If you have made two attempts to reach the customer by phone and have not reached the customer:** Make sure to log both attempts on the FS Contact Attempts Panel, even when you reach the customer.

|  |  |
| --- | --- |
| **Programs Requested** | **Action** |
| **FS Requests (including program adds)** | * Run application through the CWW driver flow and mark the Interview Details page for FS as “?-Pending Interview”. You are NOT required to run data exchange matches or update begin dates. Update all information reported on the FS application and Q? for verification. Generate the verification request letter.
 |
| **FS and MA application** | Update the Interview Details page as follows: FS - **?-Pending Interview** MA - **ACCESS or Paper**The MA application **MUST** be processed as no interview is needed for this program. Be sure to check all data exchanges and update all begin dates. Generate the verification request letter. |

**Exceptions**

1. If you have made your first contact with the customer and they cannot complete the interview, offer to schedule an appointment at an agreed upon time.
	1. If they do not wish to schedule an appointment and state they will call back, schedule an appointment for at least 7 days out.

Reminder:

MA page one applications are scheduled for an interview upon receipt. If the customer no shows for the interview, the application still needs to be processed through and questioned for all unknown information, and pend for signature.

****FS Supplement Payments**:**

* All supervisors will approve their own county’s FS Supplements.
* Use the offset indicator if a client has an overpayment. This will only be enterable if there is an overpayment on the case. Document in comments if offset indicator has been switched to Y when entering a supplement
* Do not give amounts to clients or tell them when they will receive their supplements.
* Supervisors have 10 days to issue supplements on a case

[Drug Felons](http://www.emhandbooks.wisconsin.gov/fsh/policy_files/3/3-19-1.htm):

* Email the below worker based on county of residence to schedule a drug test. The Local Agency will be responsible for updating case after a drug test is completed or missed.

NOTE: Rock County and Crawford County have different instructions, follow the instructions below.

**Local Agency Contacts:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Crawford County** | **Grant County** | **Green County** | **Iowa County** | **Jefferson County** | **Lafayette County** |
| Primary contact: changecenter@co.crawford.wi.gov | Primary: grantfamily@co.grant.wi.gov | Contact Green County CYF Social Worker Heaven Paul at (608) 328-9338   or email, hpaul@gchsd.org. (Individuals will not be seen on a walk-in bases)Agents should email: familyteam@gchsd.org to advise that a referral has been made.  | Primary:Family Team, familyteam@iowacounty.orgBack up:Kate Chambers, kate.chambers@iowacounty.org | Primary: Jessica Schultze, jessicasc@jeffersoncountywi.govBack up:Kathy Busler , kathleenb@jeffersoncountywi.gov | Agents should email the Family Team familyteam@lchsd.org and Melissa Zasada, mzasada@lchsd.org |
|  |
| **Rock County** |
| Email rockchangecenter@co.rock.wi.us when you have a customer that needs to be referred for Drug Testing.Clients will be tested at an Averhealth Clinic. Customer should wait 24 hours after the agent emails Rock Change Center before they appear at Averhealth for their test. Client must provide photo identification in order to be tested. Clinic times and locations are as follows: |
| Beloit- 64 Eclipse Blvd, Beloit, WI 53511. Monday-Friday 10:00 AM-11:00 AM and Saturday, Sunday & Holidays 11:00 AM-12:00 PM | Janesville- DWRC 1717 Center Ave, Janesville, WI 53545. Monday- Friday 12:00 PM-7:00 PM and Saturday, Sunday & Holidays 9:00 AM -10:00 AM. |

1. **Expected Change Alert**
* Expected change alerts should be used only when needed and infrequently
* Call center agents set ‘Expected Change’ alerts in CWW when further case action is needed more than 30 days out.
* Unemployment Ending
	+ From a previous agent reminder:  If a client calls to report that UIB has ended, query the data exchange.  If there is no balance remaining and benefits show exhausted, zero it out, end-date the page and advise client of reporting requirements should payments resume.
	+ If you cannot see that it has been exhausted under UIB details, set an expected change for 10 days out to review the record again to check the status.



**13.** **Error Prone Profiles**

Cases that have one or more of the following criteria are considered to be error prone and require for further investigation.

**Southern Consortium Error-prone profile:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***Residence*** | ***Household Composition*** | ***Earned Income*** | ***Unearned Income*** | ***Other*** |
| Recent arrivalsHighly mobileConflicting documentation | Employed or employable member moves outLandlord address is the same as the clientLandlord is absent parent | Zero income but expenses being metClient reports others are paying billsSelf-employed but zero incomeEmployment discrepancies—use wage queries | Household with retired person but no retirement incomeHousehold member claims disability but has no income | Worker suspicion (document in detail the reason why)Contradictory informationCase previously referred to FEV which resulted in either denial or reduction in benefitsAssets for programs with asset tests |

**14. Verifications**

* End of Employment-Reference process help/policy regarding verifications
* Partial Verification
	+ If partial verification is received, verification due dates should not be automatically extended.  Due dates should only be extended when requested from the customer.
	+ If partial verification is received on a case, as a best practice for providing good customer service, make one attempt to reach out to the customer by phone to let them know that only partial verification was received.  Document the contact in case comments. Use your best judgement as to when this would be necessary.
* Work Number Verification requests
	+ If employment must be verified through The Work Number and your county doesn’t have access to The Work Number, please send an e-mail to the rockchangecenter@co.rock.wi.us e-mail indicating the following information:
		- **Subject Line:** Work Number request
		- **Body of e-mail:** Case number, client name for whom verification is needed, SSN of that client, employer name from whom verification request is needed
		- Rock agent will request verification via The Work Number, follow up in 5-7 days to see if verification was received, print the verification and have it scanned to ECF as a “scan first” document so it can be attached to the case for processing.
		- Case comments will be entered when verification request is made and when it is routed to ECF.

**15.** **Front End Verification and Fraud**

**BRITS Referrals:**

* Agents may make their own BRITS referrals for IM programs based on changes they process. Create a referral in BRITS and enter detailed comments in BRITS of what exactly needs investigating on the case. Document the referral number in CWW case comments.
* Complete the Referral to CSI form. It can be uploaded to the document section of the BRITS referral or it can be emailed to CSI at fraud@csiagency.us
* Agents will complete the BRITS referral and assign the referral to the county of residence for the customer. The Gatekeeper will then assign it to the investigation provider.
* For Childcare referrals: Please email the supervisor for the County of Residence **before** referring a childcare investigation. Due to limited funds for CC referrals these need to be reviewed **before** they get referred.
* Please enter the specific timeframe you need investigated (e.g., 8/2019-present). If no time frame is given, they will go back as far as they can which may not be what we need.
* When coding referrals in BRITS, use **FEV** before you issue initial benefits (for intakes or new program requests). FEV referrals have a shorter investigation turnaround time and are set as a priority investigation on their end. If it is an ongoing case, code it as a **FRAUD** referral.

**If you have questions – County contacts:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Crawford** | **Grant** | **Green** | **Iowa** |
| Mendy Chesebro mchesebro@co.crawford.wi.gov | CeCe Fishnick cfishnick@co.grant.wi.gov | Laci Bainbridge lbainbridge@gchsd.org | Kate Chambers kate.chambers@iowacounty.org |

|  |  |  |
| --- | --- | --- |
| **Jefferson** | **Lafayette** | **Rock** |
|  |  |  |
| Kathy Busler KathleenB@jeffersoncountywi.gov | Melissa Zasadamzasada@lchsd.org | Mary Donahue mary.donahue@co.rock.wi.us |

**Mandatory FEV:**

* Mandatory FEV referrals policy must be followed.  Mandatory referrals will be for investigations that require a home visit to verify household composition.
* Things that can be verified via phone call (to client, employer, landlord, or another state) will be done by the agent.
* If expenses exceed income, the agent will ask client how they are meeting their expenses with no income and document in comments.
* If self-employment is suspected, but client denies it, the agent will ask the client to put it in writing and submit it.
* A worker in the county of residence is responsible for completing the cost avoidance form and emailing it to their Gatekeeper.

**Reporting Fraud – Online forms and telephone numbers**

[Wisconsin Shares Child Care, W-2, Adoption Assistance, Kinship Care and Refugee Services](https://dcf.wisconsin.gov/reportfraud) or 1-877-302-3728

[Medicaid, BadgerCare Plus, WIC or FoodShare Program](https://www.reportfraud.wisconsin.gov/rptfrd/default.aspx) or 1-877-865-3432

[Unemployment Insurance](https://dwd.wisconsin.gov/mail/asp/mailtoBenopnet.asp?WhoTo=uiproginteg@dwd.wisconsin.gov) – (UC) or 1-800-909-9472

**Overpayments**

* If a call center agent discovers a potential overpayment while working on a case, email the county of residence (see contact list below). The county of residence will determine whether a BRITS claim referral needs to be created and request verification.
* If verification is needed to determine *ongoing* benefits, the call center agent will enter “Q?” to request the verification.
* Document your actions in case comments.
* When verifications needed to determine *ongoing* eligibility are attached to a case, process them and then move them to ECF.
* When the overpayment verifications are received/attached to the case, move them to ECF and email the county of residence OP contact (see list below) that they have been received and moved to ECF. Document this in case comments. *Example*: OP verification received from employer XYZ on 07/09/21 and moved to ECF for OP worker.

**Overpayment Contact List by County**

Crawford: changecenter@co.crawford.wi.gov

Grant: grantfamily@co.grant.wi.gov

Green: tpadulla@gchsd.org *and* aballard@gchsd.org

Iowa: familyteam@iowacounty.org

Jefferson: LindsayG@jeffersoncountywi.gov

Lafayette:  familyteam@lchsd.org

Rock: OverpaymentReferrals@co.rock.wi.us

**16.** **Medicaid Programs**  

**EBD**

* Requesting Elderly, Blind, or Disabled Medicaid program.
* Assess why the customer is calling, for example, if they are calling regarding FoodShare any agent should be able to assist the customer with that. If they are calling for a new request for EBD and you are not trained in EBD programs, transfer to the appropriate queue.

**Nursing Home/Community Waiver/Family Care**

* All new requests, intakes, and asset assessments for LTC should be completed by the county of residence after following the below instructions.
	+ Discuss options for setting a filing date with the caller. Advise the caller that LTC applications are processed by appointment through the local agencies. Stress the importance of setting a filing date.
	+ If the caller is applying on behalf of another individual, ask how the individual is related to the applicant. Document the relationship (Spouse, POA, Guardian, AR, etc.).
	+ Based on the individual applying, tell the caller that supporting documentation, such as POA, Auth Rep, or guardianship paperwork will be needed to complete the application process.
	+ Collect the signature from the caller.
	+ Schedule the appointment for a phone or FTF intake with the local office.
* NOTE: If the caller applying is reporting that they are acting on behalf of an incapacitated individual, we are still to collect the signature. Tell the caller we will need documentation of incapacitation.

Important Details:

* For cases that are open for other MA categories and are requesting LTC services, schedule an appointment with the county of residence. Do not create a new RFA.
* Collect any information, if available, related to admission date to the nursing home or hospital, hospitalization prior to nursing home stay, and what type of facility it is (nursing home, assisted living, CBRF, etc.)
* If the client is requesting Family Care or Iris and is not already working with the local ADRC, please refer them to the agency for assistance. We cannot process cases for Family Care/IRIS programs without the appropriate referral/functional screen on file for Community Waiver from the ADRC for new requests.

**Ongoing LTC cases**

**Only** LTC workers should update cases and complete renewals (including FS renewals) when there is an open LTC program on a case.

**1****7. Caretaker Supplement (CTS)**

* Create an RFA and process the request.
* Collect the telephonic signature.
* Process the application or schedule an appointment for an interview in lieu of application.
* If an application is requested to be mailed, do not create an RFA.
* If they complete the telephonic signature and then request a paper application, document the request on the RFA, that they declined the interview, and mail the application. Assign to the local office for processing.

**18.** **W2 Case Specific Process**

 **Emergency Assistance**

* Refer all callers to Emergency Assistance phone number: 1-800-771-8420

**IM Program Changes:**

* Complete any changes related to the IM Programs.
* The W2 worker will get the alert to process the case.

**W2/FS/BC request, new to the system:**

* Complete RFA for the other program requests.
* Follow the same process for the new request.
	+ New Requests for Assistance (RFA):
		- Complete all the information on the RFA screens
		- Complete the interview unless the client is not able to do it at that moment. Schedule an intake appointment if they are unable to complete the interview. If the client wants to call back, please explain an appointment will still be scheduled. Please schedule the appointment 5 business days out to allow time for mailing. If the customer is on the phone with you and you are giving verbal notice of the appointment time, it is not required to schedule the appointment out 5 business days.
		- If there is an existing case, make sure to comment the appointment time/date on the case as well as the RFA.
		- Complete the telephonic signature.
		- If a call disconnects in the middle of the RFA:
			* Make one attempt to call the client back.
			* Make note of the RFA number
			* Withdraw the RFA at the end of the day if the client did not call back and finish the RFA process.
* Document in case comments the request for W2.
* Refer callers to W2 agency.

**19.** **[County Transfer](https://prd.cares.wisconsin.gov/help/ph/process_help/a6/6.1.htm)** **Process:**

Once the agent has determined the case may be transferred, the following applies:

* ****When a move is reported to or discovered by the **transfer out** consortium call center, the agent will make changes, request all needed verifications, and update the case comments.
* The local agency will complete all alerts, data exchange and cross matches. If the outstanding verification is received, the case can be transferred once processed.
* If the verification is not received timely, the workers in the transfer out agency should NV/QV the verification, run eligibility and confirm the case.
* Prior to transferring the case, case comment and make sure there are no outstanding items.
* If there are any FS supplements pending, please be sure these are approved by a supervisor prior to transferring the case.
* If the move is reported to or discovered by the **transfer in** consortium call center, the agent will transfer the case to the appropriate county within the consortium, make the changes, and request any verification necessary.
* Call center agents and/or workers in both agencies should communicate with each other and work together to ensure the transfer is completed in the most efficient manner with the least amount of trouble for the client.
* If the transfer case is requesting a new program, complete the changes and the request for the new program. Transfer the case when complete. For CC requests, please take the RFA and transfer to the appropriate county/consortium.

NOTE: For CC county transfers, please advise the client that they need to contact the new consortium/county to have their CC authorization reviewed.

See Process Help 6.1 for other program specific information

**20.** **Breaks**

Breaks are 15 minutes twice daily during the following times:

* 9:00 a.m. to 11:00 a.m.
* 1:30 p.m. to 3:30 p.m. OR after 4:00 p.m. (once queue is cleared)
* If you are taking your break outside of those times, please e-mail the admins.

**21.** **SCC Obscenity Policy** 

You must give the client one warning that you will be ending the phone call if client is using offensive language, if the client does not stop using offensive language after one warning, you may hang up the phone. It is not ok to hang up if the person that is making the remarks is someone in the background unless you are not able to hear the client due to this. Send the Consortium Code of Conduct form to the client. This form is in drop box.

1. **Escalated Call Procedure**

**Calls that should be escalated to County of Residence:**

1. Someone who is angry, upset, yelling, abusive, and demands a supervisor.  The worker has attempted to, but has not been successful in, de-escalating and cannot sufficiently address the issues because of the client behavior.

**Calls that Should be transferred to Agent’s direct supervisor:**

1. When the agent has questions about policy or is unsure of the answer to give to the client.
2. When the agent has questions about what action to take on a case they should review the case with their supervisor and follow up with the customer if needed.
3. When there is a complaint about a worker.
4. When the customer is disagreeing with case action, benefit amount ,etc. but not irate.
5. When the customer is questioning the worker’s answers, but not in a disrespectful manner.
6. When the agent is on a difficult call and needs assistance to handle the call.
7. When the customer feels mistakes were made on a case and wants a supervisor to review it.  The agent should review it with their supervisor and make any updates needed to process the case and follow up with the customer.  If the agent and supervisor find no errors, a fair hearing should be offered.
8. When the customer wishes to speak to a supervisor because they feel the agent’s conduct is unprofessional.
9. When the agent offers the client a supervisor.

**Process:**

1. Go to a lead or your local office supervisor if you have questions related to policy or for clarifications. Admins are available to assist with this type of issues only if your supervisor or lead is not present.
2. Attempt to deescalate the call, before sending it to a supervisor.
	1. Tell the client you’ll have to check policy and place them on hold to review the case/handbooks. **Do this even if you know the answer so they know we’re attempting to help.**
	2. If the escalation becomes abusive or offensive, give a warning to the customer that the behavior will not be tolerated and if it continues you will disconnect the call.
	3. If they continue, end the call in a polite manner. You are under no obligation to tolerate abusive or inappropriate behavior from clients.

If client insists on talking to a supervisor, explain to the customer that they will receive a call back within two business days, after the case is reviewed.

* 1. All Agents will e-mail escalated call back requests to the county of residence of the case. Use the below e-mails accordingly and follow the below process.

Email the case information, programs open, and team assigned with the subject stating Escalated Caller – Program Area. Include a brief summary of the issue and the interaction ID in the body of the email.

Example: Escalated Caller – LTC, CC, Bilingual, FS, BCP, etc.

The supervisor of the local office will return the call to the client within 2 business days.

|  |  |  |
| --- | --- | --- |
| County | Contact Name | Email |
| Crawford | Primary - Mendy Chesebro | mchesebro@co.crawford.wi.gov |
|  | Back up – Teresa Beers | tbeers@co.crawford.wi.gov |
| Grant | Primary - Cece Fishnick | cfishnick@co.grant.wi.gov |
|  | Back up – Nikki Huber | nhuber@co.grant.wi.gov |
| Green | Primary – Laci Bainbridge | lbainbridge@gchsd.org |
|  | Back up – Amie Ballard | aballard@gchsd.org  |
| Iowa | Primary - Kate Chambers | kate.chambers@iowacounty.org |
|  | Back up – Teresa Bahr | Teresa.bahr@iowacounty.org |
| Jefferson | Primary - Kathy Busler | KathleenB@jeffersoncountywi.gov |
|  | Back up - Jessica Schultze | JessicaSc@jeffersoncountywi.gov |
| Lafayette | Primary - Missy Zasada | mzasada@lchsd.org |
|  | Back up – Crissy Black | cblack@lchsd.org |
| Rock | All Supervisors | RockESS@co.rock.wi.us |

* 1. If there is an issue with the case and it requires corrective action from the agent, direction will be given, and the direct supervisor will be cc’d in on the email.
	2. If there is an issue from a personnel stand point (ex: rude to customer, inappropriate behavior, etc.), the call should be emailed to and discussed with the direct supervisor so they can follow up with their worker.
1. **Genesys Specifics**

***Begin taking calls when you receive an SOS e-mail and are not in client interaction.***

******Genesys Status definitions**

* Phone agents need to use only the following statuses in Genesys:
	+ **Ready** – Available to take calls
	+ **Not ready - Last Call** – Use for bathroom breaks
	+ **Not ready - Technical Issues** – Use for any technical issues. Notify all admins of any issues when you’ve set this status
	+ **Not ready - On Break** – Use for taking a break
	+ **Not ready - Lunch** – Use for lunch time if your county uses this
	+ **Not ready - Training** – Use for trainings
	+ **Not ready - Meeting** – Use for meetings.
	+ **Not ready - Case Processing** – Use for doing any other work besides taking calls in call center
	+ **After Call Work** –This is our old “wrap up” status and is 15 seconds. Switch to Extended Aftercall to finish casework or you will be placed back to a Ready status to take calls
	+ **Not Ready - Extended After Call** – Use when you need more time to finish processing a case after completing a call. This is our old “After Call Work” status.