# Pennsylvania Department of Labor and Industry Bureau of Workforce Development Administration

## **CWDS - TANF YDP Preliminary Eligibility Screening Instructions**

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## **Background**

The Preliminary Screening Function within the Commonwealth Workforce Development System (CWDS) is a tool for TANF Youth Development Program (YDP) providers to identify if an applicant may be served using TANF Youth Development Funds (YDF).

TANF YDP providers **must** ensure that the applicant meets the age eligibility requirements of the TANF YDP **prior to** utilizing this tool. To be eligible for TANF YDP funded services, the applicant **must** be between the ages of 12 (or have completed the 5<sup>th</sup> grade) and 24 years at the time of application.

If the applicant does not meet the age requirement, the applicant is **INELIGIBLE** for services using TANF YDF. The provider will not proceed with the Preliminary Screening Function but will review the applicant's eligibility for services through other funding sources.

If the applicant meets the age requirements for TANF YDP, the provider will proceed with the Preliminary Screening Function instructions.

A calculator is available to help providers determine if the applicant meets the income requirements under 235% Federal Poverty Income Guideline (FPIG). The use of the "235% FPIG Calculator" is optional.

#### **CWDS Instructions**

Step 1. Click "Sign In"

Step 2. Enter Username & Password

Step 3. Click on the CWDS 2.0 icon found on the top right corner

Step 4. Locate the "Quick Links" to the far left under the CWDS Icon

<u>Step 5.</u> Under the "Case Management" section, select the "Preliminary Screening" option which will take you to the DHS Preliminary Screening Inquiry homepage

## **Eligibility Inquiry**

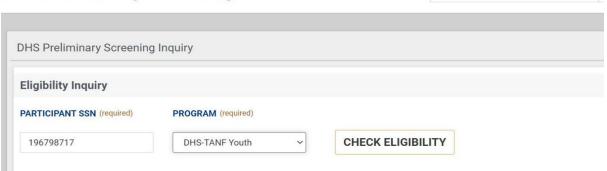
From the DHS Preliminary Screening Inquiry homepage:

Step 1. In "Participant SSN" field, enter participants social security number

Step 2. In "Program" field, select "DHS-TANF Youth"

Step 3. Click on "Check Eligibility"

### **DHS Preliminary Screening**



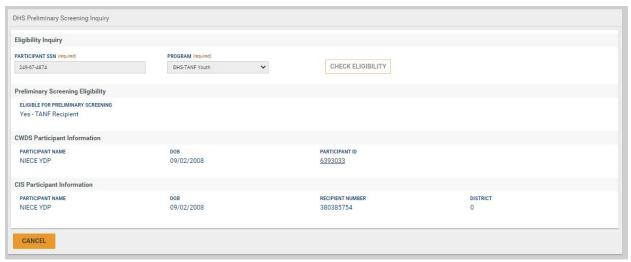
Name, SSN, PID, Phone, Email

Step 4. Screen will display one of five "Preliminary Screening Eligibility" results

## **Preliminary Screening Eligibility Results**

The "Preliminary Screening Eligibility" will display one of five eligibility results.

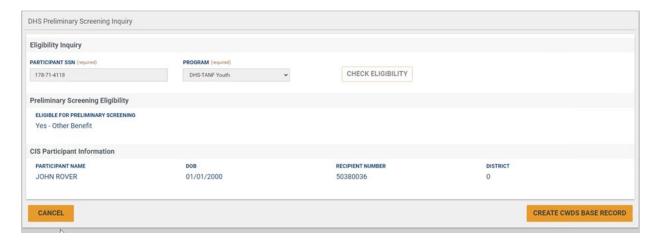
Option 1. Eligible for Preliminary Screening: Yes – TANF Recipient



Receiving an "Eligible for Preliminary Screening: Yes – TANF Recipient" result means the applicant is **ELIGIBLE** for TANF YDP funded services because they are receiving TANF benefits. The provider is not required to collect further verification, and the applicant may be served immediately using TANF YDF.

**NOTE:** If applicant is not known to CWDS, the creation of a CWDS base record will be required. Further instructions on the creation of a CWDS base record are found below on page 6.

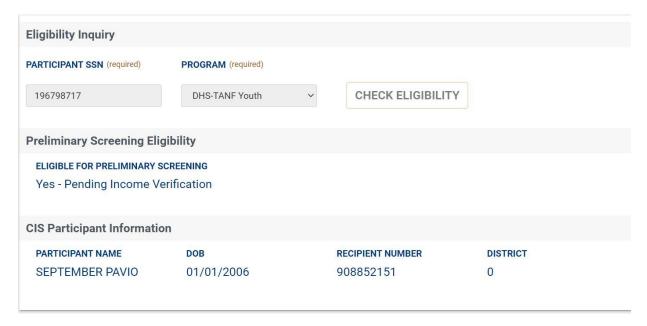
Option 2. Eligibility for Preliminary Screening: Yes – Other Benefit



Receiving an "Eligible for Preliminary Screening: Yes – Other Benefit" result means the applicant is **ELIGIBLE** for TANF YDP funded services because they are receiving Supplemental Nutrition Assistance Program and/or Medical Assistance benefits AND are under the age of 15 or age 18 or older. The provider is not required to collect further verification, and the applicant may be served immediately using TANF YDF.

**NOTE:** If applicant is not known to CWDS, the creation of a CWDS base record will be required. Further instructions on the creation of a CWDS base record are found below on page 6.

Option 3. Eligible for Preliminary Screening: Yes – Pending Income Verification



Receiving an "Eligible for Preliminary Screening: Yes – Pending Income Verification" result means that the provider must verify the applicant's household size and personal monthly gross earned income to determine eligibility\*.

The provider must verify and document that the applicant's personal monthly grossed earned income is under 235% FPIG\*. The provider may utilize the "235% FPIG Calculator" to determine if the applicant is income eligible for TANF YDP funded services.

Receiving an "Income Eligible" result on the "235% FPIG Calculator" means that the applicant is **ELIGIBLE** for TANF YDP funded services. The provider is not required to collect further verification, and the applicant may be served.

Receiving an "Income Ineligible" result on the "235% FPIG Calculator" means that the applicant is **INELIGIBLE** for TANF YDP funded services. If the applicant is income ineligible, the provider must verify that the applicant resides in a High Poverty Area, using the most current version of the *Pennsylvania High Poverty Area Verification* tool, and has an additional barrier\*.

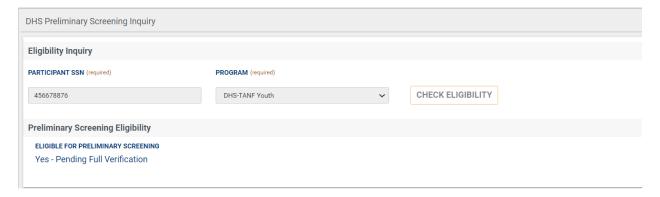
If the applicant meets the High Poverty Area Verification, the applicant is **ELIGIBLE** for TANF YDP funded services and may be served. If the applicant does not meet the High Poverty Area Verification, the applicant is **INELIGIBLE** for TANF YDP funded services. The provider will then review the applicant's eligibility for services through other funding streams.

\*Please see the TANF YDP Manual for additional information.

**NOTE:** A copy/screenshot of **All** verifications must be retained in the participant's TANF YDP Data File and be made available upon request to confirm program eligibility and allowable expenditures.

**NOTE:** If applicant is not known to CWDS, the creation of a CWDS base record will be required. Further instructions on the creation of a CWDS base record are found below on page 6.

Option 4. Eligible for Preliminary Screening: Yes – Pending Full Verification



Receiving an "Eligible for Preliminary Screening: Yes – Pending Full Verification" means that the provider must verify all eligibility requirements: residency, citizenship status, household size, and personal monthly gross earned income\*.

The provider must verify and document that the applicant meets TANF YDFP residency and citizenship requirements\*. If the applicant does not meet the residency and/or citizenship status requirements, the applicant is **INELIGIBLE** for TANF YDP funded services. The provider will review the applicant's eligibility for services through other funding streams.

If the applicant meets the TANF YDP residency and citizenship requirements\*, the provider must verify that the applicant's personal monthly grossed earned income is under 235% FPIG\*. Providers may utilize the "235% FPIG Calculator" to determine if the applicant is income eligible for TANF YDP funded services.

Receiving an "Income Eligible" result on the "235% FPIG Calculator" means that the applicant is **ELIGIBLE** for TANF YDP funded services. The provider is not required to collect further verification, and the applicant may be served.

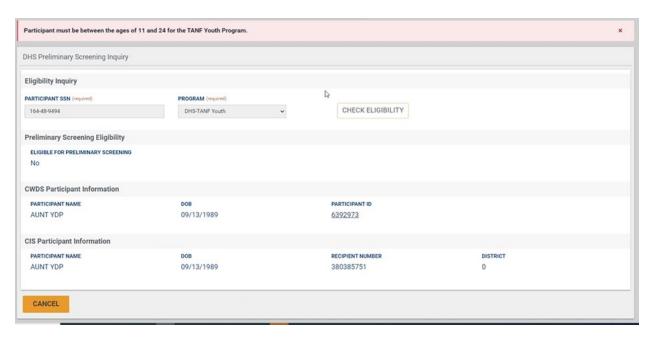
Receiving an "Income Ineligible" result on the "235% FPIG Calculator" means that the applicant is **INELIGIBLE** for TANF YDP funded services. If the applicant is income ineligible, the provider must verify that the applicant resides in a High Poverty Area, using the most current version of the *Pennsylvania High Poverty Area Verification* tool, and has an additional barrier\*.

If the applicant meets the High Poverty Area Verification, the applicant is **ELIGIBLE** for TANF YDP funded services and may be served. If the applicant does not meet the High Poverty Area Verification, the applicant is **INELIGIBLE** for TANF YDP funded services. The provider will then review the applicant's eligibility for services through other funding streams.

**NOTE:** A copy/screenshot of **All** verifications must be retained in the participant's TANF YDP Data File and be made available upon request to confirm program eligibility and allowable expenditures.

**NOTE:** If applicant is not known to CWDS, the creation of a CWDS base record will be required. Further instructions on the creation of a CWDS base record are found below on page 6.

Option 5. Eligible for Preliminary Screening: No



Receiving an "Eligible for Preliminary Screening: No" means the applicant is known to eCIS and/or CWDS but does not meet the age requirements to participate in TANF YDP. Therefore, the applicant is **INELIGIBLE** for TANF YDP funded services.

<sup>\*</sup>Please see the <u>TANF YDP Manual</u> for additional information.

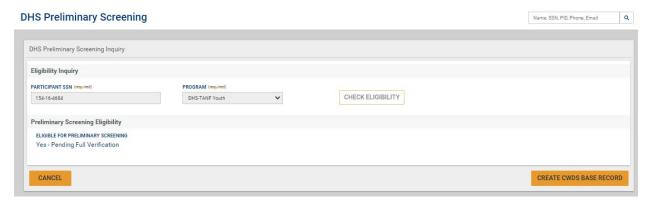
### Creating a CWDS Base Record

The DHS Preliminary Screening Tool will only allow providers to "Create a Base Record" for individuals not already known to CWDS.

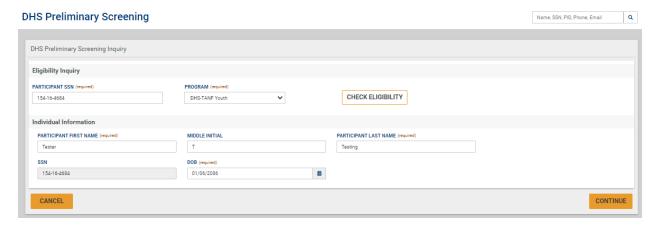
#### Scenario 1: Individual not known to eCIS or CWDS (Yes-Pending Full Verification Result)

The provider will be required to "Create CWDS Base Record" for individuals that are not known to eCIS or CWDS. Only the Preliminary Screening Eligibility will display. There will be no Participant Information listed under the Eligibility result as the individual is unknown to both systems.

Step 1. Click on "Create CWDS Base Record" after completing the initial Eligibility Inquiry

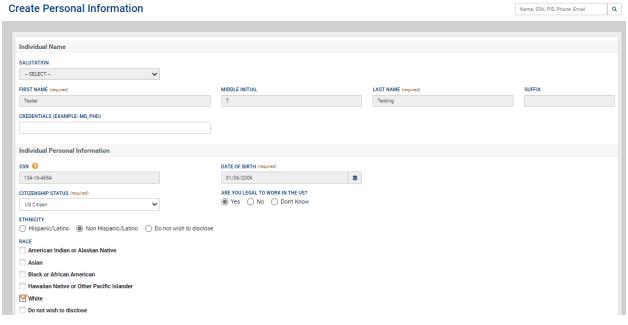


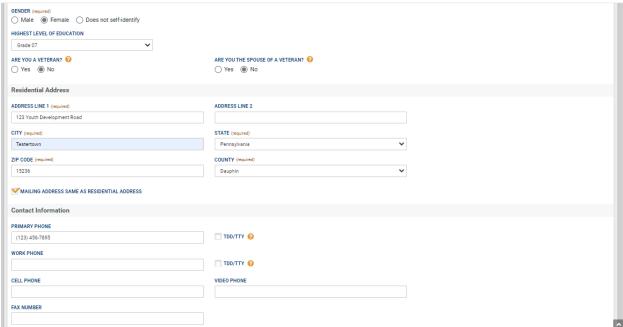
<u>Step 2.</u> Enter the Participant First Name, Participant Last Name, and Date of Birth and click on "Continue"

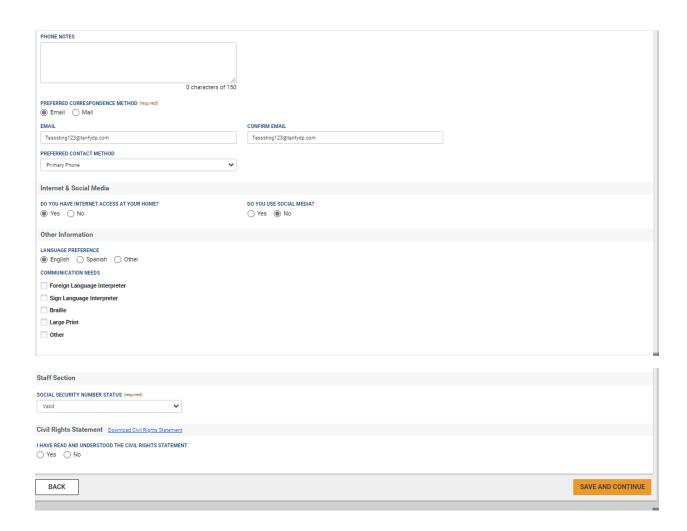


<u>Step 3.</u> Complete all required fields under "Create Personal Information" and click on "Save and Continue"

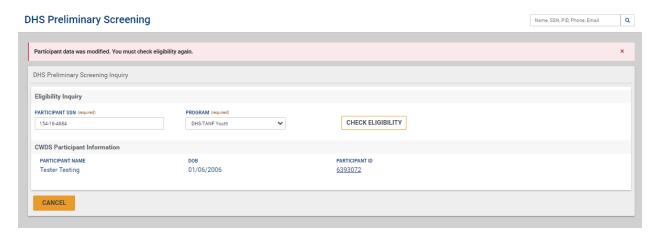
#### **Create Personal Information**



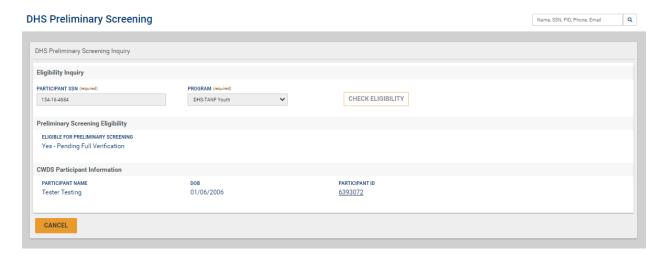




<u>Step 4.</u> A notification will display indicating that participant data was modified, and the provider must check eligibility again. Click on "**Check Eligibility**"



## <u>Step 5.</u> Final Preliminary Screening results under "Eligible for Preliminary Screening" will display and a base record has been created

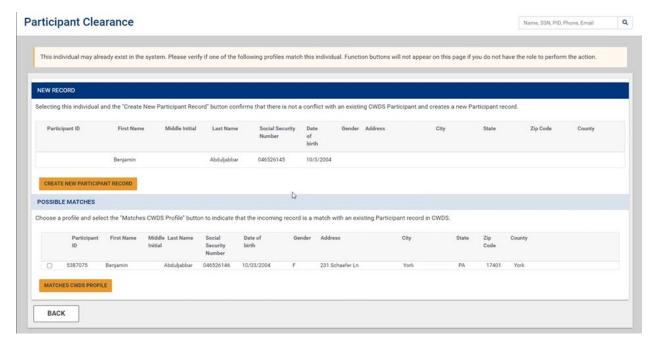


The provider will take the appropriate next step based on the final Preliminary Screening Eligibility result as described above.

The "Eligibility for Preliminary Screening" will not change unless the date of birth the provider entered into the base record does not meet TANF YDP age requirements. A final Preliminary Screening Eligibility result of "No" means the date of birth the provider entered into the CWDS base record does not meet TANF YDP age requirements and is **INELIGIBLE** to receive TANF YDP funded services.

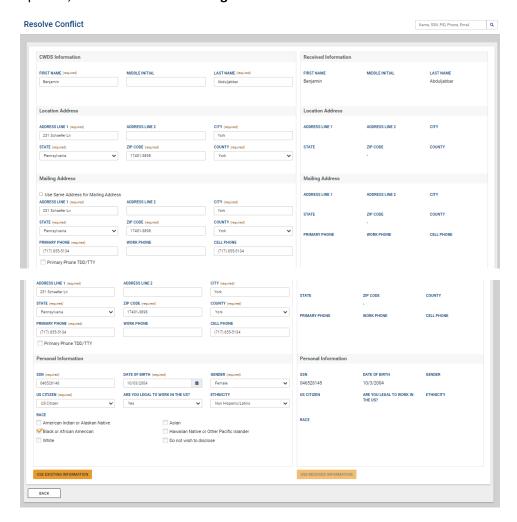
#### Participant Clearance

If the provider completes Step 2 and is directed to "Participant Clearance", it means that there is an existing record for an individual with the same Name and Date of Birth but a different SSN.



Step 1. Review "Possible Matches"

- Step 2. Determine if an existing base record matches the applicant's verified information
- Step 3. Proceed to the appropriate steps under A or B
  - A. If an existing base record under "Possible Matches" is confirmed to be the applicant:
    - Step 1. Click on the toggle next to the matching individual and select "Matches CWDS Profile"
    - <u>Step 2.</u> Review "**CWDS Information**" on the "**Resolve Conflict**" screen, make any verified updates, and click on "**Use Existing Information**"



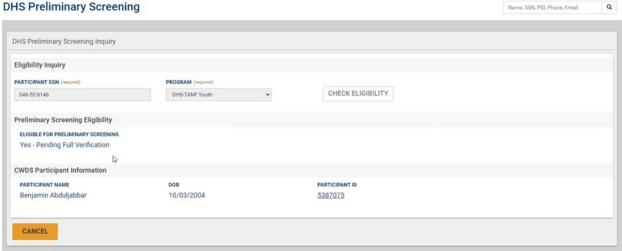
<u>Step 3.</u> Providers will be redirected to Step 4 to re-assess eligibility by clicking "**Check Eligibility**" for the final Preliminary Screening result

B. If an existing base record does not match the applicant's verified information, click "Create New Participant Record". Providers will be redirected to Step 3 above to "Create Personal Information" and will complete the remaining steps.

#### Scenario 2: Individual known to CWDS but not eCIS (Yes-Pending Full Verification Result)

The provider will not receive a "Create CWDS Base Record" option as a CWDS base record already exists. The CWDS Participant Information will be displayed.

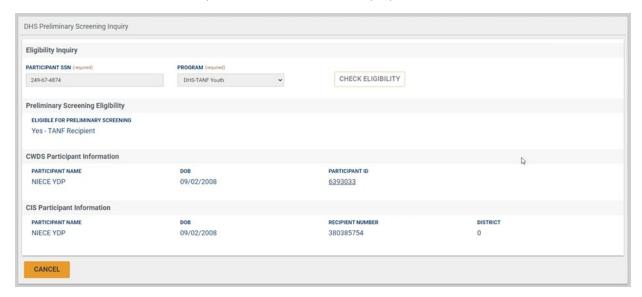
#### **DHS Preliminary Screening**



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Scenario 3: Individual known to both CWDS and eCIS (All Results, except Pending Full Verification)

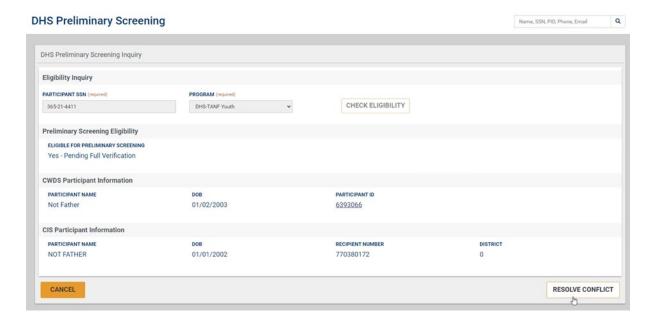
The provider will not receive the "Create CWDS Base Record" option as a CWDS base record already exists. The CWDS and CIS Participant Information will be displayed.



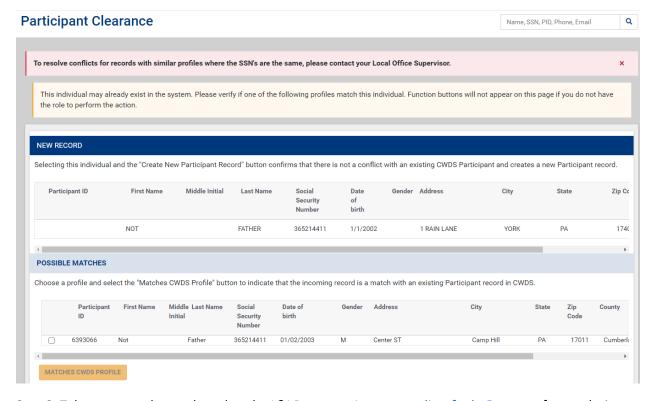
#### **Resolve Conflict**

The provider will be prompted to "Resolve Conflict" when the CWDS and CIS Participant information are displayed for the SSN entered but the individual's name and/or date of birth do not match in CWDS and eCIS.

Step 1. Click on "Resolve Conflict"



Step 2. Review "Possible Matches" on the "Participant Clearance" screen to identify errors

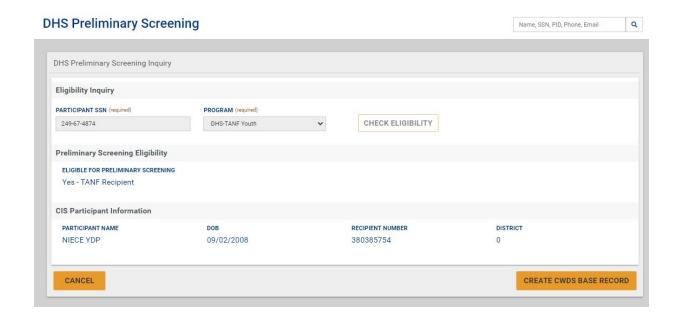


Step 3. Take a screen shot and send to the L&I Resource Account, ra-litanf-ydp@pa.gov, for resolution

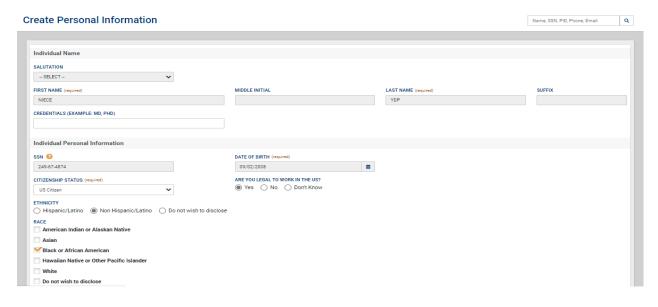
## Scenario 4: Individual known to eCIS but not CWDS (All Results, except Pending Full Verification)

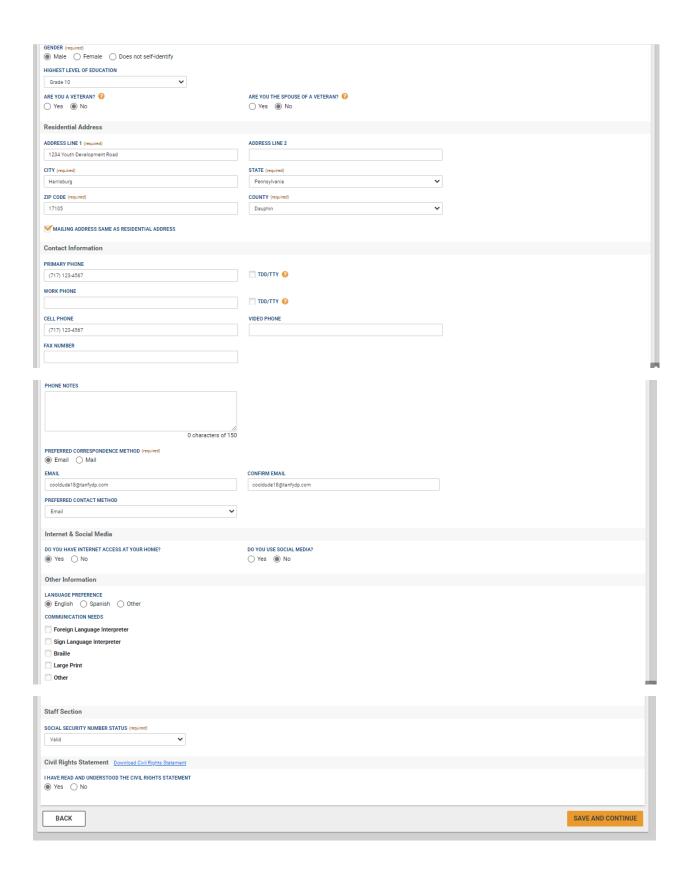
The provider will be required to "Create CWDS Base Record" for individuals that are known to eCIS but not CWDS. The CIS Participant Information will be displayed.

Step 1. Click on "Create CWDS Base Record"



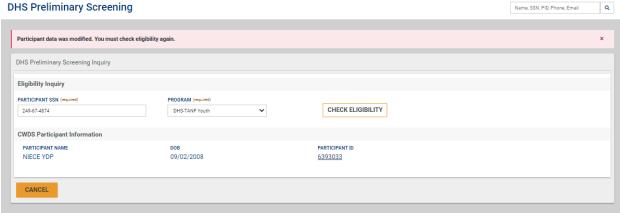
## <u>Step 2.</u> Complete all required fields under "Create Personal Information" and click on "Save and Continue"





<u>Step 3.</u> A notification will display indicating that participant data was modified, and the provider must check eligibility again. Click on "**Check Eligibility**".

#### **DHS Preliminary Screening**



Step 4. Final Preliminary Screening Eligibility results for "Eligible for Preliminary Screening" will display, and a base record has been created.

