

To: ES Providers and IM Supervisors

From: DHS and DEED

Subject: Use of Manual Referrals and MAXIS/WF1 Interface

This memo is in response to employment service providers and financial worker requests for status update corrections and clarification on the use of manual updates.

It is not uncommon for issues to be incorrectly reported as problems with the interface when they are actually caused by incomplete data coming across from MAXIS to WF1. Often, this is due to a Financial Worker sending a Manual Referral prior to eligibility being determined. In addition, we are seeing status updates coming across to WF1 from MAXIS due to cases being FIATED rather than using MAXIS eligibility functionality as designed.

Referrals

All Referrals are electronically generated from MAXIS to WF1. Referrals can be sent to Employment Service providers three different ways:

- The most common and preferred way is the automated referral. These referrals are generated when cases become eligible for the MFIP or FS programs. They are also generated when an MFIP, DWP or FS case is approved after transferring to a new county.
- Another automated referral type is done prior to DWP program approval or unresolved 7th month Sanction. For these types of referrals if MAXIS is coded correctly a DAIL message will be produced:
REF NBR: XX WORKFORCE ONE REFERRAL ELIGIBLE VIA INFC:WORK
NOTE: Financial Workers should NOT be generating manual referrals in lieu of a regular DWP referral or MFIP 7th month Sanction referral. Current POLI/TEMP (**TE10.6**) explains this process.
- A county generated manual referral options is also available to counties. This function allows County financial workers to generate a referral from MAXIS to WF1, even when MAXIS conditions would not normally support a referral. County generated (manual) referrals should only be used in limited situations.

Since the manual referral process bypasses MAXIS automated practices, MAXIS staff will not address questions submitted to the TSS Help Desk or submitted as PF11's when the issue has to do with a WF1 referral that was manually sent by the financial worker. However, MAXIS staff will continue to address issues related to the automated WF1 referral process.

Manual Referrals are not intended to replace or otherwise circumvent the automated MAXIS referral process, nor should they be used to supercede standard practices and functionality of the WF1 system.

Because a manual referral allows for an override of the normal MAXIS referral processes, there are few edits to check for accuracy of usage. For instance, a pending cash application which has INELIGIBLE results due to missing verifications CAN still be referred. If that application later is denied, or ends up being a different program completely, discussion about the appropriateness of the referral should be between the County and the WF1 provider. Information sent on the manual referral prior to eligibility being determined by the MAXIS system will be based on the last eligibility result. This could result in incorrect or out-of-date MAXIS data being sent to WF1 but it is NOT an interface issue.

MAXIS to WF1 interface issues with a manual referral:

- When a financial worker sends manual referrals on a pending case, MAXIS does not send correct/current MAXIS data....this is NOT an interface issue. Because the grant hasn't been approved, and an ES Status code hasn't been determined yet, there is no data for the manual referral to recognize.

What to do when WF1 does not display a referral:

- 1) ES Worker should contact the Financial Worker to confirm if the referral was sent.
 - a. If the Financial Worker doesn't believe the referral was sent they can generate a manual referral. If however, they think that there was a system problem with the initial referral, they should report the issue to MAXIS staff by either contacting the TSS Help Desk or by generating a PF11. MAXIS staff will research the issue with WF1 Help Desk if needed.
 - b. If the Financial Worker verifies that the referral was sent, the ES Worker should call or email the WF1 Help Desk to report the problem.
- 2) If the WF1 Help Desk cannot locate the referral, they will contact the TSS Business Analysts and they will research the issue together.
- 3) When the issue is resolved or if further action is needed, the WF1 Help Desk will contact the ES Worker and TSS Business Analyst will contact the Financial Worker.