

Generating Summaries

Process Help 1.6.1.8

When to Send:

- When the case is pending for a valid signature ONLY
- When the client requests a summary be generated/mailed
- When all verification has been received; note this in case comments
- When processing an FFM application, a case summary should always be mailed as the member does not get Wisconsin's Rights and Responsibilities through the FFM application
- When a Telephonic signature has been collected, since the client is agreeing to this information by completing telephonically (Tel Sig states the summary will be mailed)
- When completing a CTS review or application, please choose written and select the mail option.
- For Child Care cases, the Case Summary must be generated and sent to the parent after the interview, but this can wait until outstanding verification has been received, to align with policies for generating summaries for other programs



Do Not Send:

- When processing a change or a SMRF
- When a case is currently pending for verification and is in intake or renewal status
 - EXCEPTION: If the case is ONLY pending for a valid signature, we must send the summary



*** Workers may want to make a note in case comments indicating that a case summary will need to be generated once verification items are returned in their entirety and the case is no longer in intake/renewal status***