

**DEPARTMENT OF HEALTH AND FAMILY SERVICES
DIVISION OF HEALTH CARE FINANCING
ADMINISTRATOR'S MEMO SERIES**

NOTICE: 07-04

DATE: March 14, 2007

DISPOSAL DATE: Ongoing

RE: Expansion of ACCESS
Apply for Benefits and Report
My Changes

To: County Departments of Human Services Directors
County Departments of Social Services Directors
Tribal Chairpersons/Human Services Facilitators
Tribal Economic Support Directors

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PURPOSE

The purpose of this memo is to describe the planned expansion of the ACCESS website to allow customers to apply for Medicaid for the Elderly, Blind and Disabled, as well as to report additional changes in household composition, income and expenses. The target launch date for these expansions is June 1, 2007.

Although these enhancements do not change the process for acting on online applications and change reports, they may increase the volume of online applications and change reports that local agencies receive. In addition, workers who have not yet received online applications or change reports may need to familiarize themselves with the methods for processing these items. This memo provides guidance on steps agencies may take to respond successfully to online applications and change reports. More detailed information on these tools will be found in a future Operations Memo.

INTRODUCTION

Initially funded by a Food Stamp Program Participation grant, the ACCESS website is designed to increase participation in FoodShare and Medicaid, improve customer service and satisfaction, ease workload for local agencies and improve payment accuracy. ACCESS, which is available at www.access.wisconsin.gov, now includes four tools:

- ✓ Am I Eligible?, a short, simple self-assessment tool (Ops Memos 04-40 and 04-63);
- ✓ Check My Benefits, a tool for recipients to check the status of their benefits (05-38);
- ✓ Apply For Benefits, an online application for FoodShare, Medicaid, and/or the Family Planning Waiver Program (06-04); and
- ✓ Report My Changes, a tool for customers to report job changes to the local agency (06-37).

These tools are described in detail in the ACCESS handbook at <http://emhandbooks.wi.gov/ah>, as well as in CARES Worker Web (CWW) Process Help.

Prior to designing these tools, DHFS gathered extensive input from supervisors and eligibility workers, advocates and low-income Wisconsin residents. Our meetings and focus groups helped to ensure that the online tools met the needs of local agencies, service providers, and customers.

Current Use of ACCESS

Since the implementation of Apply For Benefits (AFB) in June 2006, local agencies have received online applications for FoodShare, Family Medicaid and/or the Family Planning Waiver Program. These applications are managed and assigned through a set of pages in CARES Worker Web called the Local Agency Inbox. The Inbox may also be used to select, assign and manage Requests For Assistance (RFA) from other sources. The Inbox is designed to work with a variety of agency models and provide flexibility for large, medium and small local agencies.

In most agencies, a supervisor or clerical staff member is responsible for checking the Inbox for new applications and then assigning those applications to workers. In other agencies, workers select the next available application directly from the Inbox. When a worker processes an online application, the data provided by the applicant is pre-populated into the appropriate screen in CWW. **Note:** Online applicants must provide the same verification as people who apply by phone, by mail or in person. For FoodShare applications, applicants must complete an interview with the worker in person or by phone.

Since June 2006, over 19,000 online applications have been submitted. This represents 10 to 15 percent of all new applications. We have seen a modest increase in the total number of online applications submitted each month.

In September 2006, we implemented Report My Changes (RMC), which allows FoodShare and Medicaid recipients to create a secure account and report a change in job income to the local agency. Online change reports are assigned directly to the primary caseworker, and/or they can be managed through a Change Report Inbox similar to the Local Agency Inbox described above. Since September, approximately 1,200 online change reports have been submitted statewide.

Enhancements to Ease Agency Workload

In most cases, agencies have been successful in managing and processing online applications and change reports. Many agencies have adjusted staff roles and responsibilities to respond effectively to the new application methods. In late January, we completed a series of enhancements to CWW to make online application processing easier for workers. Those enhancements, which were made in response to feedback from agencies through the Income Maintenance Advisory Committee, are described in detail in Operations Memos 07-03, 07-04 and 07-05. The most significant enhancements include:

- ✓ Using the CARES driver flow and data pre-population to process applications that are submitted by someone who is already open for benefits.
- ✓ Automating the process of accepting new data from applicants who are known to CARES, as well as data from change reports.

We anticipate that these changes will significantly streamline online application and change report processing for workers. As announced in the DHFS IM Learning Center, appropriate staff will have an opportunity to participate in a hands-on CWW refresher lab in February or March to learn more about the recent enhancements and increase their knowledge about processing ACCESS items.

Online Applications from the Elderly, Blind and Disabled

Currently, AFB may be used to apply for Medicaid, but the online application does not collect all of the information needed to determine Medicaid eligibility for individuals who are elderly, blind or disabled (EBD) and do not meet the criteria for Family Medicaid. If an EBD customer uses ACCESS to apply, the worker must follow up with the applicant to collect information about assets, disability, and living arrangement.

With this ACCESS expansion, AFB will include detailed questions for EBD applicants pertaining to assets, disability, and living arrangement. As a result, workers will receive and review more data from online applications with EBD applicants. Although CWW will not change significantly, workers who have not yet processed online applications may need to learn these skills before the implementation date. In addition, staff members who use the Inbox to manage and assign new applications may need to modify their Inbox search criteria to identify and assign applications from EBD applicants and/or nursing home residents.

For applicants in need of long-term care, ACCESS applications will serve as an alternative to the paper application currently used in the long-term care application process. Nursing home residents will be able to apply for Institutional Medicaid using ACCESS. These applicants can be identified in the Inbox by their status as nursing home residents. Community Waivers and Managed Long-Term Care Programs (e.g., Family Care and Partnership) applicants may use ACCESS to complete a Medicaid application. This change does not affect other existing processes, including functional screening and determining medical remedial expenses.

Additional Change Categories in Report My Changes

Currently, RMC allows customers to report changes only to job income. With this expansion, customers will also be able to report changes in household composition (person add, person delete, disability, pregnancy, marriage, divorce, and death), self-employment, unearned income, address, and housing and utility bills. In situations where a person is being added to a case, RMC will employ a driver flow to ask most or all of the questions needed to determine eligibility for the new person.

Although the steps for processing change reports will not change significantly, these enhancements will likely add to the volume and complexity of changes that are reported through ACCESS. Online change reports will continue to be assigned directly to the primary caseworker on the case. Local agencies with a change center will continue to use the Change Report Inbox to manage and assign change reports to change center workers.

Key Considerations for Local Agencies

To respond effectively to these enhancements, we recommend that local agencies consider the following questions prior to the June 1, 2007, implementation date. The answers to these questions may help to identify workers' training needs and the need for adjustments to the assignment and processing of online applications and change reports:

- ✓ Have all workers who will be working with change reports and online applications completed training on how to process these items? Are they familiar with the guidance available in CWW Process Help?
- ✓ If your agency has specialized workers who process applications from EBD customers and/or nursing home residents, are these workers familiar with how to process ACCESS applications?
- ✓ If someone in your agency uses the inbox to assign incoming applications to workers, will they need to adjust their assignment process? For example, will they need to search for EBD MA applications and assign them to specialized EBD workers?

Communication

More detailed information about these enhancements will be available in an Operations Memo prior to the implementation date. In addition, we plan to offer supplemental opportunities for workers who would like to participate in a training activity.

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