



DEPARTMENT OF CHILDREN
AND FAMILIES
Secretary Reggie Bicha
201 East Washington Avenue, Room G200
P.O. Box 8916
Madison, WI 53708-8916
Telephone: 608-266-8684
Fax: 608-261-6972
www.dcf.wisconsin.gov

DEPARTMENT OF HEALTH SERVICES
Secretary Karen E. Timberlake
1 West Wilson Street
P.O. Box 7850
Madison, WI 53707-7850
Telephone: (608) 266-9622
FAX: (608) 266-7882
www.dhfs.wisconsin.gov

**State of Wisconsin
Governor Jim Doyle**

**TO: Income Maintenance Supervisors
Income Maintenance Lead Workers
Income Maintenance Staff
W-2 Agencies
Workforce Development Boards
Job Center Leads and Managers
Training Staff
Child Care Coordinators**

**FROM: Amy Mendel-Clemens, Section Chief
Technical Assistance, Training & Education
Bureau of Enrollment Policy and Systems
Division of Health Care Access and Accountability**

BEPS/DFS OPERATIONS MEMO		
No: 10-13		
DATE: 03/02/2010		
FS <input type="checkbox"/>	MA <input type="checkbox"/>	BC+ <input type="checkbox"/>
SC <input type="checkbox"/>	CTS <input type="checkbox"/>	FSET <input type="checkbox"/>
	BC+ CORE	<input checked="" type="checkbox"/>
CC <input type="checkbox"/>	W-2 <input type="checkbox"/>	EA <input type="checkbox"/>
CF <input type="checkbox"/>	JAL <input type="checkbox"/>	JC <input type="checkbox"/>
RAP <input type="checkbox"/>	WIA <input type="checkbox"/>	Other <input type="checkbox"/> *
EP		

SUBJECT: BadgerCare Plus Core Plan Waitlist Administration

CROSS REFERENCE: Operations Memo 10-14

EFFECTIVE DATE: MARCH 1, 2010

PURPOSE:

This memo describes the functionality of the new CWW Pages designed to manage the BadgerCare Plus Core Plan Waitlist.

BACKGROUND:

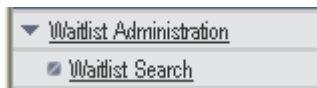
The BadgerCare Plus Core Plan Waitlist (Waitlist) was implemented in October 2009. At that time, individuals were added to the waitlist by applying online or by calling the Enrollment Services Center (ESC). The ESC worker had to process the request through the Application Services Tool (AST) to submit the name of the individual to the waitlist. There was no CARES functionality to track the individuals on the waitlist or to update the demographic information. The Waitlist information was stored on a spreadsheet managed by the ESC.

NEW CWW FUNCTIONALITY:

A new Waitlist Management tool, including three new CWW pages has been added to CWW to assist the ESC workers in managing the Core Plan waitlist. These new pages will allow ESC workers to search for individuals on the waitlist, update the demographic information and waitlist status and manually add individuals to the waitlist. The new pages are:

- Waitlist Search Criteria Page
 - Waitlist Search Results Page
 - Waitlist Detail Page (Add new individuals, Edit existing information, View current and past information)
- **Note:** The new Waitlist pages also include information on individuals' BadgerCare Plus Basic Plan status. No data will be available for this plan until after the program is implemented.

The Waitlist Administration tool is accessible via the CARES Worker Web Navigation Menu:

**CONVERSION**

The existing Waitlist members' information from the spreadsheet will be populated into the Waitlist Management tool. However, any changes that have been made to the spreadsheet such as new address or contact information will have to be updated on the Waitlist Details page manually.

Waitlist Search Criteria page

This page allows workers to search for individuals who have been placed on the Core Plan Waitlist.

A Waitlist search can be conducted by using any one of the following:

- Demographic information – first AND last name (birth date or gender are optional)
- ACCESS Tracking Number
- Social Security Number
- Waitlist Security Code
- Waitlist status

When searching for an individual, the system will return a maximum of 250 records. If the search criterion returns more than 250 results, the user will be prompted to provide more specific criteria.

The screenshot shows the 'Waitlist Search Criteria' page in the CARES Worker Web. The top navigation bar includes the user ID 'JX2189', user name 'M LEVY', and a 'Quick Select' dropdown set to 'CASE/RFA'. A 'Reset' button is located in the top right corner. The left sidebar contains a 'Navigation Menu' with categories like 'Search', 'RFA / Case', and 'Worker Tools'. The main content area is divided into four sections:

- Demographic Information (1):** Fields for First Name (P), Last Name (P), Birth Date (09/01/1985), and Gender (MALE). A 'Go' button is at the bottom.
- Identification Numbers (2):** Fields for ACCESS Tracking Number, SSN, and Waitlist Security Code, each with a 'Go' button.
- Status Reporting (3):** A dropdown menu for 'Display counts of inbox items with following status:' set to '-Select One-', with a 'Go' button.
- BadgerCare Plus Basic Criteria (4):** A checkbox for 'Display waitlist items with MCI mismatch:' and a 'Go' button.

1 Demographic Information: To search using demographic information, enter information in both the first name and last name fields and then click on the corresponding 'Go' button in the demographic information section.

- **Note:** Searches can be conducted using partial values in either or both of the First Name and Last Name fields. Any names that start with those characters or exactly match those characters will be returned.

② Identification Numbers: To search using an identification number, enter only one of the identification number fields, click on the corresponding 'Go' button.

③ Status Information: Workers have the ability to conduct a search to retrieve counts based on status information. In this section, searches are conducted based on the waitlist status selected in the waitlist status drop down field. When the worker clicks the 'Go' button for this section, the same page will be displayed again with an informational message at the top with the counts of the waitlist records that match the selected status:

Code	Text	Description
ATW	Added to waitlist	The individual has been added to the waitlist
ITA	Invited to apply	The individual has had a security code generated and mailed to them.
WSU	Waitlist security code used	The individual has logged in with the security code.
WSE	Removed – Waitlist security code expired	The individual logged in with the security code, but did not complete their AFB application in time or the person did not use their security code in time.
PRM	Removed – Program rules not met	The individual is no longer eligible for the Core Plan

④ BadgerCare Plus Basic: This search will provide a list of individuals who are on the waitlist, have paid their initial premium but were not automatically enrolled in the Basic Plan because of MCI clearance issues. These individuals will have to be processed through clearance in CWW by an ESC worker.

WAITLIST SEARCH RESULTS PAGE

The Waitlist Search Results page will be displayed if more than one possible match is found from the search criteria entered on the Search Criteria page. All the waitlisted individuals meeting the search criteria will be displayed. The search results will be sorted by ACCESS Application Number. However, the list can be re-sorted by clicking on a column header:

- First Name,
- Last Name,
- ACCESS Application Number,
- Gender,
- Birth Date,
- County (residence county indicated on the application),
- Initial Premium Paid indicator, and
- MCI Clearance indicator.

Clicking on the column header will re-sort the entire list (not just the records currently displayed) and redisplay the information, starting with the first record for the sort criteria. When sorting records, those with no data for the sorted column will appear at the end of the list.

① Initial Premium Paid: This indicator is populated through a nightly batch process for all individuals on the waitlist who have paid the initial premium for the BadgerCare Plus Basic Plan. The valid values for the Initial Premium Paid indicator are:

- Yes – The initial BadgerCare Plus Basic premium has been received for this individual.
- No – No BadgerCare Plus Basic premium has been received, or the premium transaction has failed, for this individual.

② MCI Clearance: This information is updated nightly. The code will indicate if the individual has been run through clearance with the nightly batch process. The valid values for the MCI Clearance indicator are:

- NA – MCI Clearance has not been run for the individual. This will be the case if the individual has not requested BadgerCare Plus Basic.
- Pass – MCI Clearance has been run through batch for this individual and the individual has passed with no mismatches.
- Fail – MCI Clearance has been run through batch for this individual and there was a mismatch. These individuals require a worker to process the individual through clearance in CWW.

③ View Waitlist: Clicking on the magnifying glass under this section will take the worker to the Waitlist Details page for this individual.

④ View BC+ Basic: Clicking on the magnifying glass under this section will take the worker to the Search page with the application number pre-filled.

CARES Worker Web User ID: JX2189 User Name: M LEVY Quick Select: CASE/RFA 09/29/2008

Navigation Menu

- Search
 - CARES Home
 - Search
 - Pre-Inbox Search
 - Inbox Search
- RFA / Case
 - Client Registration (0)
 - Case Summary
 - Application Entry (0)
 - Initiate Eligibility Determination
 - Eligibility
 - Post Eligibility
 - Confirmation Access
 - Query
 - Benefit Issuance
- Worker Tools
 - Waitlist Administration
 - Worker Tasks
 - Case Management
 - Client Correspondence
 - Reference Tools
 - System Tools
 - CWMV Suggestions
 - CARES Mainframe Access

Waitlist Search Results

Individual
 First Name: P
 Last Name: P
 ACCESS Tracking Number: Waitlist Security Code:

Search Results

First Name	MI	Last Name	ACCESS Tracking Number	Waitlist Status	Gender	Birth Date	County	Initial Premium Paid	MCI Clearance	View Waitlist	View BC+ Basic
PANDE		PANDE	1005478015	Invited to Apply	MALE	03/01/1944	RACINE COUNTY	Y	N		
PARADE		PARA	2005478024	Added to Waitlist	MALE	09/01/1985	MILWAUKEE COUNTY	Y	Y		
PAD		PAD	3005469433	Added to Waitlist	MALE	01/01/1970	MILWAUKEE COUNTY	Y	N		
PEND		PEND	4005469540	Added to Waitlist	MALE	01/10/1971	CLARK COUNTY	Y	Y		
PARTHA	P		5005478850	Added to Waitlist	MALE	01/01/1963		N	N		

Previous

WAITLIST DETAILS PAGE

The Waitlist Details page can be used to view and/or update the individual’s Waitlist information.

All information on the Waitlist Details page is taken from the individual’s ACCESS application, unless the individual was added to the waitlist manually.

Workers will be able to update certain information on this page, based on the worker’s security level.

The Waitlist Details page displays the following information:

Effective Period

- Updated Date
 - This date is defaulted to most recent updated date
- Worker ID
 - This field will display the ID of the worker who most recently updated the information.

Individual Identification Information

- Individual Name
- Social Security Number
- ACCESS Application Number

- This field will display the ACCESS Tracking number. If the individual was manually added to the waitlist, a CARES tracking number along with the message 'Manually Added to the Waitlist' will display.
- View Client Correspondence
 - Clicking on this will take the worker to copies of any client correspondence that has been sent to this individual.
 - **Note:** The Waitlist Confirmation letters sent prior to March 1, 2010 can not be viewed using this link. These letters were mailed manually, not system generated.

Individual Demographic Information

- Gender
- Language
- Birth Date
- Death Date
- Living arrangement
- County / Tribe

Individual Waitlist Information

- Waitlist program
 - This field will display a code for either Childless Adult (CLA) or Transitional Childless adult (TCLA).
 - **Note:** If the individual was a TCLA, s/he has only been added to the waitlist to assign a security code (9867546774) to allow the TCLA member to bypass the waitlist when using ACCESS AFB to complete his or her renewal.
- Date added to the Waitlist
- Security Code Expiration Date (Will be read-only when the Waitlist status is 'ATW'.)
- Number of People Ahead of Individual
 - The individual's position in the waitlist queue
- Waitlist security code
- Waitlist termination reason
 - The reason the individual was removed from the waitlist. Valid reasons:

Code	Text	Description
527	Eligible for other Medicaid	The individual has become eligible for another program
036	Moved out of Wisconsin	The individual has moved out of the state
081	Deceased	The individual has died
141	Does not meet program requirements	The individual no longer meets the Core Plan requirements
625	Medicare Entitled	The individual is entitled to receive Medicare through another program.
633	Core Plan- Aged Out	The individual turned age 65
068	Already Receives MA through SSI	The individual is receiving Medicaid benefits through SSI

- Waitlist termination date
 - This is a system generated date indicating when the person's waitlist spot is terminated

- Invitation code override reason
 - The reason a new security code was generated. Valid reasons:

Code	Text	Description
DD	Department Decision	The department has made a decision that this individual should receive a new security code.
WE	Worker Error	Worker error has forced a new security code to be generated for this individual.
SE	System Error	System error has forced a new security code to be generated for this individual.

- Invitation code override date
 - The date the new security code was generated
- Waitlist status
 - The current status of the waitlist member. Valid statuses:

Code	Text	Description
ATW	Added to waitlist	The individual has been added to the waitlist
ITA	Invited to apply	The individual has had a security code generated and mailed to them.
WSU	Waitlist security code used	The individual has logged in with the security code.
WSE	Removed – Waitlist Security Code expired	The individual either logged in with the security code and did not complete their AFB application or did not use the security code prior to the expiration date.
PRM	Removed – Program rules not met	The individual is no longer eligible for the Core Plan

- Status updated date
 - The date the most recent waitlist status change took place

BadgerCare Plus Basic Information

- Initial Premium Requirement Met
 - Identifies if the individual on this waitlist record has paid a premium to enroll in the BadgerCare Plus Basic plan
- MCI Clearance
 - Identifies if the individual on this waitlist record has been cleared in MCI as part of their eligibility for the Badger Care Plus Basic Plan
 - NA – Individual has not requested Basic Plan
 - Pass – MCI Clearance run, record has passed with no mismatches
 - Fail –MCI Clearance has been run through batch for this individual and there was a mismatch. These individuals require a worker to process the individual through clearance in CWW.
- View BC+ Basic Details.

Mailing Address Information

- Address
- City
- State
- Zip Code

Contact Information

- Home Phone Number
- Cell Phone Number
- Work Phone Number
- Message Phone Number
- E-mail Address

UPDATING THE WAITLIST DETAILS PAGE

ESC and HP Member Services Vendor staff will be able to update:

- Name
- SSN
- All Individual Demographic information
- Mailing Address
- Contact Information
- Comments (maximum of 500 characters can be entered)

Edit Mode – Vendor Staff View:

Waitlist Details		Cancel	Reset
Waitlist Details			
Effective Period			
Last Updated:	02/15/2009	Worker:	XCTJ81
Individual Information			
* First Name	MI	* Last Name	SSN:
TCLA		GAMP	; 111 - 111 - 111
Tracking Number: 100275818			
View Client Correspondence:			
Individual Demographic Information			
* Gender:	M - MALE		
Language:	H - Hmong		
* Birth Date:	07 / 07 / 1972		
Death Date:	MM / DD / YYYY		
* Living Arrangement:	H - Homeless		
* County of Residence:	40 - MILWAUKEE COUNTY		
Individual Waitlist Information			
Waitlist Program:	TCL - Transitional Childless Adults		
Date Added to Waitlist:	02/09/2010		
Security Code Expiration Date:	05/31/2010		
Number of People Ahead of Individual:	2		
Waitlist Security Code:	9867546774		
Waitlist Termination Reason:		Waitlist Termination Date:	
Invitation Code Override Reason:		Invitation Override Date:	
Waitlist Status:	ITA - Invited to apply		Status Updated Date: 02/09/2010
BadgerCare Plus Basic Information			
Initial Premium Requirement Met:			
MCI Clearance:	NA		
View BC+ Basic Details:			
Mailing Address Information			
* Address Line 1:	1 WEST WILSON STT		
Address Line 2:	APT #2		
* City:	LAC DU FLAMBEAU	* State:	WI - WISCONSIN
* ZIP:	53703 -		
Contact Information			
Home Phone:	123 456 7890	Work Phone Ext:	
Work Phone:		Message Phone Ext:	
Cell Phone:			
Message Phone:			
Email Address:			
Comments			

ESC State Staff will be able to update the above information but will also be able to update:

- Security Code Expiration Date
- Waitlist Termination Reason
- Invitation Code Override Reason
- Waitlist Status

Edit Mode – State Staff View:

Waitlist Details		Cancel	Reset
Waitlist Details			
Effective Period			
Last Updated:	02/09/2010	Worker:	CARES
Individual Information			
First Name	MI	Last Name	SSN:
TCLA		GAMP	111 11 111
Tracking Number: 100275818			
View Client Correspondence:			
Individual Demographic Information			
Gender:	M - MALE		
Language:	H - Hmong		
Birth Date:	07 / 07 / 1972		
Death Date:	MM / DD / YYYY		
Living Arrangement:	H - Homeless		
County of Residence:	40 - MILWAUKEE COUNTY		
Individual Waitlist Information			
Waitlist Program:	TCL - Transitional Childless Adults		
Date Added to Waitlist:	02/09/2010		
Security Code Expiration Date:	05 / 31 / 2010		
Number of People Ahead of Individual:	2		
Waitlist Security Code:	9867546774		
Waitlist Termination Reason:		Waitlist Termination Date:	
Invitation Code Override Reason:		Invitation Override Date:	
Waitlist Status:	ITA - Invited to apply	Status Updated Date:	02/09/2010
BadgerCare Plus Basic Information			
Initial Premium Requirement Met:			
MCI Clearance:	NA		
View BC+ Basic Details:			
Mailing Address Information			
Address Line 1:	1 WEST WILSON ST		
Address Line 2:	Apt #2		
City:	LAC DU FLAMBEAU	State:	WI - WISCONSIN
ZIP:	53703		
Contact Information			
Home Phone:	123 456 7890	Work Phone Ext:	
Work Phone:		Message Phone Ext:	
Cell Phone:			
Message Phone:			
Email Address:			
Comments			

Waitlist Details page in 'Add' Mode

When a search is conducted using an SSN and the search returns no results, ESC State workers will be taken to a blank Waitlist Details page in 'Add' mode. The worker will then be able to manually add the individual to the waitlist by filling in the information on the Waitlist Details page.

In 'Add' mode:

- The effective date, date added to the waitlist and last updated date will default to the date the worker is adding the individual to the waitlist
- The Worker ID will default to the ID of the worker currently logged in to CWW
- The SSN will default to the SSN entered on the Waitlist Search Page.

All other information must be entered by the worker.

CONTACTS:

BEPS CARES Information & Problem Resolution Center

*Program Categories – FS – FoodShare, MA – Medicaid, BC+ – BadgerCare Plus, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – FoodShare Employment and Training, BC+ Core – BadgerCare Plus Core, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WIA – Workforce Investment Act, Other EP – Other Employment Programs.

DHS/DHCAA/BEPS/AMC