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**State of Wisconsin
Governor Scott Walker**

**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: Sabrina Fox, Policy Section Chief
Bureau of Enrollment Policy & Systems
Division of Health Care Access and Accountability**

BEPS/DFS OPERATIONS MEMO					
No: 12-58					
DATE: 11/09/2012					
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+ Basic	<input type="checkbox"/>	BC+ CORE	<input 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: Income Maintenance Management Reporting

CROSS REFERENCE: PH 3.15

EFFECTIVE DATE: NOVEMBER 12, 2012

PURPOSE:

The purpose of this memo is to announce the implementation of certain Income Maintenance (IM) reports that include Consortia and local agency data to support management decisions related to Consortia operations.

BACKGROUND:

Consortia and local agencies use various reports to monitor operations, caseload, and worker activities. These reports may be in the Automated Case Directory (ACD), EOS, or may be created in an ad hoc fashion by the state, the consortia, or the agencies. Reports are needed to monitor caseload, program participation, timely processing, benefit issuance, etc. These reports can be used to assist managers in making decisions about staffing needs, outreach plans, performance trends, and other information as needed by the Consortia.

POLICY:

There are no policy changes in this memo.

REPORTS:

Reports will be published weekly and monthly in ACD within a new folder titled "IM Management Reports". There will be two sub-folders to differentiate between the two different types of reports that will be available. The "IM Workload Reports" folder will include reports related to caseloads and program participation and will be based on the County of Residence identified on the Case Summary page in CARES Worker Web (CWW). The "IM Performance Reports" folder will include reports related to Application Work Items and timeliness from the CWW Workload Dashboard and are based on County of Administration. Report Help, describing criteria specific to that report, will be available for each report.

Attached is a table (See attachment 1) that identifies each of the reports that will be available beginning November 12, 2012. Future reports will provide historical monthly data related to consortia application volume and timeliness, untimely details, and case summary reports for tribes.

IT NEEDS:

Internet Explorer version 8 (IE 8) or less must be used to access the reports. ACD/WebI/FSDW reports are not compatible with IE 9.

It is recommended that the latest version of Java.exe is installed on the computer (tested with Java(TM) Platform SE binary v 6.0).

WORKLOAD MANAGEMENT REPORTS:

There are three summary reports that are included for workload management and all are based on County of Residence as identified in CWW. Currently, these reports exclude cases administered by tribal agencies. These reports will be refreshed monthly on the evening of the last day of the month. Generally, reports will be available on the 3rd of the month for the previous month, however occasionally there may be delays of 1-2 days due to end of month batch processing volume. The reports displayed on November 12th will include data for the month of October. The report for November is scheduled to be available on December 3rd.

- 1) The Active Case Summary Report includes cases that are open, pending or closed less than one calendar month. The report is populated with data from CWW eligibility fields in the eligibility run results for pending cases and the eligibility determination results from the Confirmed Assistance Group Summary page for cases open or closed more than a calendar month. From the Active Case Summary Report users can drill down in the report to consortia, county of residence, worker, and case detail sub-reports.
- 2) The Income Maintenance Case Summary Report provides counts of open (not pending or closed) IM cases cases with or without FoodShare for various program categories for a calendar month. There are no sub-reports for this report, however users will receive a prompt allowing them to load reports for the consortia, county, or month of their choice.

- 3) The Income Maintenance Recipient Summary Report provides counts of IM recipients including adults and children with or without FoodShare eligibility for various program categories for a calendar month. There are no sub-reports for this report, however users will receive a prompt allowing them to load reports for the consortia, county, or month of their choice.

PERFORMANCE MONITORING REPORTS:

The Performance Monitoring Reports will not be available on November 12th. A communication will be sent to the Consortia Leads and CARES and Policy Coordinators with the implementation date for these reports.

There are four summary reports that are included for performance monitoring:

- Received Applications Summary
- Applications Timeliness Summary
- FoodShare Applications Timeliness Summary
- Health Care Applications Timeliness Summary

These reports are based on the County of Administration in CWW at the time the Work Item was completed or ended in the CWW Workload Dashboard. Application work items completed on or before the due date or extended due date will be considered timely in these reports.

►**Note:** A Work Item is created for a FoodShare application when the FoodShare request is updated from a 'No' to a 'Yes' and the filing date is updated. This logic was put into place to prevent the Dashboard from counting a FoodShare case that is re-opening under the Break in Service policy as an application. Beginning October 26, 2012, the program request for FoodShare cases closed more than one calendar month will be automatically updated to a 'No'.

FoodShare Priority Service (FSPS) application work items that change from FSPS to a regular FoodShare work item when the ongoing FS eligibility is pending will only be counted once in the reports. The timeliness determination will be based on the completion and end date of the FS Priority Service work item. These reports will be refreshed weekly to display month to date information and generally the reports will be available by Tuesday of the following week. The reports will also be refreshed on the evening of the last day of the month to reflect data for the entire calendar month. Generally, reports will be available on the 3rd of the month for the previous month, however occasionally there may be delays of 1-2 days due to end of month batch processing volume. The reports displayed on November 12th will include month to date data for November.

TRAINING:

Chapter 3.15, IM Management Reporting, will be added to Process Help prior to implementation with more detail on using the Income Maintenance Management Reports. To view the Income Maintenance Management Reporting PowerPoint that was shared with IMAC on 10/18/12, visit the DHS Learning Center Instructional Resources. WEBI training is available on the DHS Learning Center by searching entire catalog under the course titled: WEBI XI 101: Training for the Viewer User.

SYSTEM HELP:

Any worker who currently has access to the ACD folder in WISDOM will be granted access to the new IMMR folders within the DHS Folder. For those users that need to obtain access to ACD, navigate to the Systems Gateway page and click on the Help link. From there you will find instructions to request access to ACD.

PROCESS HELP:

Process Help, Chapter 3.15, with instructions on how to access the Income Maintenance Management Reports will be published, in the near future. A copy of that chapter is attached and can be used until Process Help is updated.

ATTACHMENTS:

Process Help Chapter

CONTACT:

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/SE