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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: Shawn Smith, Bureau Director
Bureau of Enrollment Policy & Systems
Division of Health Care Access and Accountability**

DHS OPERATIONS MEMO					
No:		DHS 14-15 Amended			
DATE:		4/9/2014			
FS	<input type="checkbox"/>	MA	<input checked="" type="checkbox"/>	BC+	<input checked="" type="checkbox"/>
SC	<input type="checkbox"/>	CTS	<input type="checkbox"/>	FSET	<input type="checkbox"/>

SUBJECT: Single Streamlined Application for Health Care

EFFECTIVE DATE: April 28, 2014

PURPOSE:

The purpose of this Operations Memo is to announce changes in CARES Worker Web (CWW) and ACCESS to support a "single streamlined application" process for BadgerCare Plus (BC+) and programs available through the Federally Facilitated Marketplace (FFM).

BACKGROUND:

Provisions in the Patient Protection and Affordable Care Act (PPACA) of 2010 require states to implement a single streamlined application for health care that includes all of the questions needed to determine eligibility for BC+, as well as for Advance Premium Tax Credits (APTCs) and cost-sharing reductions available through the FFM. The addition of these questions will serve to expedite the application process if and when a member's application is transferred from the state to the FFM.

To meet this federal requirement, Wisconsin's application process will include questions that are not used for BC+ eligibility determinations but are required when determining eligibility for APTC. The application process will also be updated to exclude questions not necessary for BC+ and/or APTC determinations, such as those related to income types not counted under MAGI rules.

Additional changes to meet the federal requirements for a single streamlined application will be made during a future phase.

HEALTH CARE APPLICATION CHANGES:

ADDITION OF APTC-RELATED QUESTIONS:

The following questions will be added to the paper application form, ACCESS Apply for Benefits (AFB) and CARES Worker Web (CWW). These questions are not required or used for BC+ eligibility, do not require verification, and are asked for the purpose of collecting the information to ensure that if someone’s account is transferred to the FFM, the FFM receives the information they need to make an APTC determination. Workers should collect this information, but should not delay the completion of a BC+ application for this information. New questions will not impact eligibility or application processing for other programs, including Elderly, Blind, Disabled MA (EBD MA), Long Term Care MA (LTC) FoodShare (FS), Child Care (CC) and **Wisconsin Works (W-2)**.

TRIBAL MEMBERS:

New questions for Tribal Members applying for Health Care include:

- Whether they are a member of a federally recognized tribe, and if so, the name of that tribe.
- Whether the applicant has actually received services from Indian Health Services (IHS),

PERMANENT DEMOGRAPHICS PAGE:

A new tribal information question has been added to the Permanent Demographics page in CWW to collect information on whether an individual is a member of a federally recognized tribe and, if so, the name of the tribe.

These questions are not currently used for BC+ eligibility but are needed by the FFM to determine if an individual qualifies for an APTC.

Tribal Member Information	
* Are you a member or a child of a member of an American Indian Tribe or an Alaskan Native?	Yes <input type="button" value="v"/> Verification: NV - NOT VERIFIED <input type="button" value="i"/>
* Are you eligible to receive health care from Indian Health Services or at a tribal clinic?	Yes <input type="button" value="v"/> Verification: NV - NOT VERIFIED <input type="button" value="i"/>
Have you ever received Health Care from Indian Health Service or a tribal health program?	Yes <input type="button" value="v"/>
Federally Recognized Tribe	
Are you a member of a federally recognized tribe?	Yes <input type="button" value="v"/>
Tribe Name:	Cherokee
Obsolete Information	
Verification (Date of Death):	<input type="button" value="v"/>

HEALTH INSURANCE COVERAGE:

New questions about health insurance coverage and sources have been added to the Medical Coverage page. As noted above, these questions are not required for BC+ eligibility, but are to be collected for APTC determination through the Marketplace.

The Medical Coverage Page in CWW will be updated to collect the source of health insurance if it is not employer-sponsored. Non-employer sponsored insurance information may be collected by the worker or may be updated through the interface with Forward Health interChange (iC). CWW will collect this information under a new section titled "Coverage Type". The question "Is this coverage through a current employer?" will replace "Is or was this Medical Insurance Coverage provided by an employer?" If the worker selects "No" in response to the question "Is this coverage through a current employer?", the Coverage Type dropdown field will be enabled. The dropdown list will include the following insurance types: Peace Corps, TRICARE, Veterans Health Administration Programs, Private Insurance Plan, COBRA Continuation coverage, Retiree Health Plan and Past Employment.

The Employer Information section is enabled only if the response to "Is this coverage through a current employer?" is "Yes" or the "Coverage Type" selected is COBRA, Retiree or Past Employment. Even though coverage through COBRA, a retiree plan or past employment does not impact BC+ eligibility, the FFM considers this to be "employer-sponsored insurance" and asks Wisconsin to collect detailed information about the employer.

In the Employment Information section, the worker can choose from a dropdown of employers already listed on the case, which will be identified by start date and sequence number. Choosing the employer from the dropdown will prepopulate the employer name and address from the Employment Page. If the correct employer does not appear in the dropdown, the worker should enter the employer information directly on this page. Once an employer has been selected, the worker may click the "Change Employer" link next to the field to re-display the dropdown and clear out the fields that currently have employer information on the page. In addition, the Insurance Carrier Information section will now include a new field called "Insurance Plan Name" for the worker to enter the name of the insurance plan. For example, Blue Cross Blue Shield would be the insurance carrier while the insurance plan name would be the "Gold Plan" offered by Blue Cross Blue Shield.

As discussed below, ACCESS has been updated to reflect similar changes in the collection of health insurance information. Workers should be aware of the following considerations when processing ACCESS applications:

- When processing an ACCESS application, the FEIN will not, in most cases, be provided by the applicant as part of the information about the employer who provides health insurance. If the employer information from ACCESS displays directly on the page, but the worker has already looked up the FEIN as part of completing the Employment page, the worker may click on "Change Employer" to select the same employer from the dropdown as was reported through ACCESS. This will pre-populate the information already entered on the Employment page, which should include the FEIN. However, if the "Change Employer" is selected, the information will be cleared. The worker will have to re-enter the information provided in the following questions:
 - Does the employer pay at least 80% of the premium?
 - Is this a State Employee Health Plan?
 - Employee Only plan premium:

Alternatively, the worker can use the FEIN look-up function on the Medical Coverage Page.

- When the applicant reports in ACCESS that a current employer is providing insurance but they haven't reported having a job through that employer, an employment record is created in ACCESS and is sent to CWW so that the worker is aware of the employment and can request more information about that employment by completing the Employment page and pending for further verification.

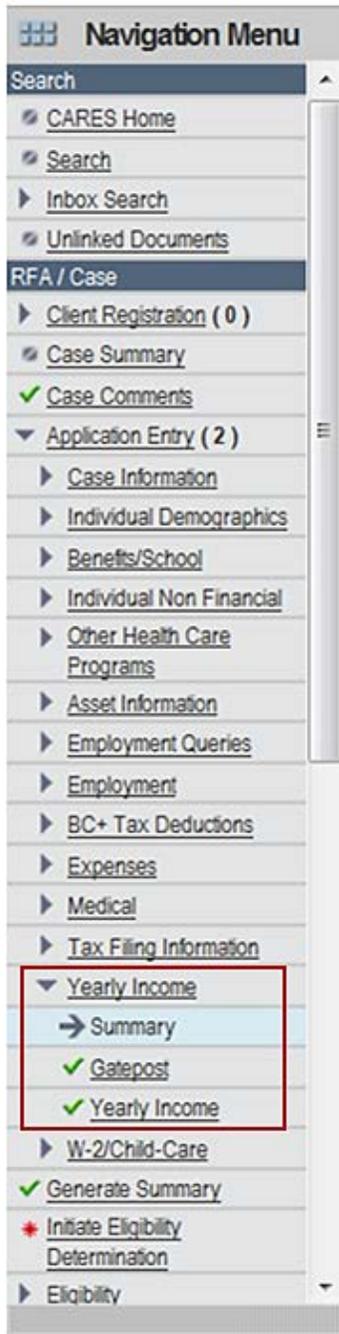
For example, if the applicant reports that their current employer Famous Dave's is providing insurance, but they haven't reported having a job through Famous Dave's, a placeholder employment record page in ACCESS is sent to CWW for Famous Dave's.

CWW has also been updated so that if a worker enters a premium amount, the Verification field will auto-populate with "NQ-Not Questionable". Premium information is not required for BC+ eligibility, but if collected, will be sent to the FFM. This information can potentially be used for APTC eligibility at the FFM.

Yearly Income:

A new section “Yearly Income” will be added to CWW. This section will collect information on whether or not anyone in the household has income that changes from month to month. This will only be scheduled in intake, review, person add and program add driver flows when there is a BC+ request on the application. A “Yearly Income” section with a gatepost, summary and detail page will be added to the navigation menu after the Tax Filing Information section.

APPLICATION ENTRY NAVIGATION MENU CHANGES:



YEARLY INCOME GATEPOST PAGE:

The question “Does anyone in the household have income that changes month-to-month?” will be displayed. If the response to this gatepost question is Y, the Yearly Income Details page will be scheduled. This information is collected per individual, not at the case or household level.

The screenshot shows the CARES Worker Web interface. The header includes the user ID (XCTY93), user name, and quick select (CASE/RFA). The case number is 1002337216, status is Open, and mode is Review. The date is 05/01/2014. The navigation menu on the left lists various sections, with Yearly Income selected. The main form area is titled "Yearly Income Gatepost" and contains a question: "Does anyone in the household have income that changes month-to-month?" with a dropdown menu set to "Yes". Below the question is a checkbox labeled "Based on client's response, populate blank fields as N" and an "Add Case Comment" button. The form also includes "Cancel" and "Reset" buttons.

YEARLY INCOME DETAILS PAGE:

Workers should collect the expected yearly income for the current year for individuals who indicate that their income changes month-to-month. If yearly income is expected to change the next year, workers should also collect the expected income amount for the next year.

If the applicant does not know his or her expected income amount, the worker should select the “Does not know” checkbox.

Verification of this information is not required. These questions are designed to collect the applicant’s best estimate of their expected annual income for the current and following year only for FFM determinations. This information does not affect eligibility for BC+. Workers are not to use the information on this page to question information that has already been verified for Employment/Unearned Income.

Please note that this page is intended to capture a yearly income amount for members who have fluctuating income, as well as other instances in which current monthly income does not match the member’s overall yearly income.

- For example, an individual who worked for the first nine months of the year has now lost his job and does not receive unemployment. He currently has no income listed on his application when he applies in October. The 'Expected income amount for Current Year' field would still include his estimate of overall income for the year. Based on his current estimate, he may state his 'Expected income amount for Next Year' to be \$0.

The screenshot shows the 'Yearly Income Details' form in the CARES Worker Web. The form is titled 'Yearly Income Details' and includes a 'Cancel' button and a 'Reset' button. A green banner at the top of the form area states: 'The following events have occurred: AE 280: The client reported information is displayed on this page.' Below this, the 'Effective Period' section shows 'Begin Month: 05 / 2014' and 'End Month: MM / YYYY'. The 'Delete Reason' field is empty. The 'Yearly Income Details' section contains the following information:

Individual:	
Expected income amount for Current Year:	\$ 9000.00 <input type="checkbox"/> Does not know
Income different Next Year?	Yes
Expected income amount for Next Year:	\$ 10000.00 <input type="checkbox"/> Does not know

At the bottom of the form, there is a section for 'Individual' with a dropdown menu and a date field 'Updated on or before MM / DD / YYYY'. There are also 'Previous' and 'Next' navigation buttons.

CHANGES TO QUESTIONS FOR HEALTH CARE ONLY APPLICATIONS:

Wisconsin is removing application questions not directly needed for BC+ and/or APTC determinations from paper applications, ACCESS and CWW. The questions will also be removed from ACCESS Report My Changes and Renew My Benefits when all of the assistance groups on the case have their eligibility determined under Modified Adjusted Gross Income (MAGI) rules.

The questions that will no longer be included are:

- Child Support Income,
- Money from Other Person,
- Veteran Benefits,
- Workers Compensation,
- Details about Supplemental Security Income payments,
- Child support payments to someone outside of the household, and
- In addition, Wisconsin will no longer ask about blindness and disability for someone on a health care only application who is *not* requesting benefits.

The following pages in CWW will be updated.

UNEARNED INCOME GATEPOST:

CWW will no longer require responses to gatepost questions regarding the following unearned income types for BC+ only applications: Money from Other Person, Veteran Benefits, and Workers Compensation. These will continue to be required for other programs based on those programs' eligibility rules. As a reminder, these income types should be collected if and when the member changes from BC+ to an EBD or LTC category of MA.

Because Child Support/Maintenance/Alimony is a combined gatepost question, this question will continue to be required.

In ACCESS, the system will continue to ask whether or not someone receives SSI, but details about these payments (such as amount and frequency) will not be collected. Instead of receiving applicant-reported SSI details through ACCESS, workers will need to populate those pages using existing data exchanges for SSI payments.

The screenshot displays the 'Unearned Income Gatepost' form in the CARES Worker Web interface. The top navigation bar includes the user ID (XCTV44), user name, and case information (Case: 5002621058, Status: Pending, Mode: Intake). The form is titled 'Unearned Income Gatepost' and shows the 'Effective Period' as 02/20/2014. The main section asks 'Does anyone in your household receive income from any of these sources?' and lists various income types with dropdown menus for 'N - No' or other values. Red boxes highlight 'MO - Money From Other Person', 'WC - Workers Compensation', and 'VE - Veteran Benefits'. The 'Educational Aid' section has a dropdown for 'N - No'. Navigation buttons 'Previous' and 'Next' are visible at the bottom right.

EXPENSE GATEPOST:

For BC+ only applications, CWW will no longer require an answer to the question on the Expense Gatepost page regarding Support Obligations/Payments. As a reminder, workers will need to collect this information if and when the member later becomes eligible for EBD or LTC MA.

CARES Worker Web User ID: XCTJ78 User Name: Quick Select: CASE/RFA Go Help Logout

DEVELOPMENT Primary Person: Case: 2000820727 Status: Open Mode: Ongoing v3.1 04/10/2009

Action Items (3) Expense Gatepost Cancel Reset

Effective Period
Last Updated: 04/10/2009

Dependent Care Obligations/ Payments
* Does anyone in your household pay for someone to care for a dependent child or disabled / incapacitated adult so that a household member can get to work or training / school or look for a job? Y - Yes

Support Obligations/ Payments
* Does anyone in your household make any support payments to / for persons living in another household (Child Support, Maintenance, etc)? OR Is any person required by the court to pay guardian or attorney's fees? Y - Yes

Medical Expenses
* Does anyone in your household have any medical expenses which have been paid during the last 4 months or any medical expenses which are unpaid? [Dropdown]

Shelter
Does anyone in your household incur shelter costs? OR
Does an institutionalized individual intending to return home incur shelter costs for maintaining a home or apartment?

* RT - Rent or Lot Rent?	Y - Yes	* MO - Mortgage?	Y - Yes
* PT - Property Tax?	N - No [Dropdown]	* HI - Insurance on Structure?	Y - Yes
* ML - Mobile Home Loan Payments?	Y - Yes	* SA - Special Assessments?	N - No [Dropdown]

Utility
Does anyone in your household incur utility costs? OR
Does an institutionalized individual intending to return home incur utility costs for maintaining a home or apartment?

* GA - Gas(natural)?	Y - Yes	* EL - Electricity?	[Dropdown]
* PH - Phone?	Y - Yes	* LP - LP Gas?	[Dropdown]
* WA - Water?	N - No [Dropdown]	* TR - Trash Removal?	[Dropdown]
* FO - Fuel Oil / Kerosene?	Y - Yes	* SE - Sewer?	[Dropdown]
* IN - Installation?	Y - Yes	* CO - Coal?	[Dropdown]
* WS - Waste Water Treatment?	Y - Yes	* OT - Other?	[Dropdown]
* WD - Wood?	N - No [Dropdown]		

WHEAP
* Have you received WHEAP at the current address in the current or previous heating season? Y - Yes

Subsidized Housing Information
Last Updated:
* Effective Month: MM / YYYY * Subsidized Housing Status: [Dropdown]

Updated on or before
MM / DD / YYYY Go

Based on client's response, populate blank fields as N
Add Case Comment Cancel Previous Next

EXPENSE DETAILS PAGE FOR SUPPORT OBLIGATIONS/PAYMENT:

If a Support Obligations/Payment record is created, CWW will no longer require a response to the Health Care Amount or Health Care Amount Verification for Support Obligations/Payments for BC+-only applications.

The screenshot displays the 'Support Obligations / Payments' form in the CARES Worker Web. The interface includes a navigation menu on the left with categories like 'RFA / Case', 'Application Entry (5)', 'Expenses', and 'Support'. The main form area contains the following sections:

- Effective Period:** Begin Month (MM / YYYY), End Month (MM / YYYY), Last Updated.
- Delete Reason:** A dropdown menu.
- Additional Information:** Payor (dropdown), Sequence (0), Support Type (dropdown), Court Ordered (dropdown).
- Health Care Amount:** A field with a dollar sign and a verification dropdown.
- FoodShare Amount:** A field with a dollar sign and a verification dropdown.
- Comment:** A text area with a character count of 0/200.

At the bottom, there is a control bar with a dropdown set to 'Individual', a 'Sequence' field, an 'Updated on or before' date field (MM / DD / YYYY), and navigation buttons for 'Previous' and 'Next'.

NON-GAMING TRIBAL INCOME:

A new question “Non-gaming tribal income?” will be added to the second section of the Benefits Received page in CWW to collect information on whether or not an individual receives non-gaming tribal income types that are exempt for MA and BC+ Programs only. As addressed in Operations Memo 14-14, the following new types of non-gaming tribal income are exempt for all MA and BC+ Programs:

- Per capita payments from a tribe that come from natural resources, usage rights, leases, or royalties.
- Payment from natural resources, farming, ranching, fishing, leases, or royalties from land designated as Indian trust land by the Department of Interior (including reservations and former reservations).
- Money from selling things that have cultural significance.

On the Permanent Demographics page, if the response to the question, “Are you a member or a child of a member of an American Indian Tribe or an Alaskan Native?” is “Yes”, then the Non-Gaming Tribal Income question will be enabled on the Benefits Received page.

Benefits Received [2 of 2]

Effective Period

* Begin Month: / Last Updated: **05/01/2014**

Additional Information

Has the individual received any of the following benefits?

* Kinship Care: <input type="text" value=""/>	* Kinship Care Court Order?: <input type="text" value=""/>	* Verification: <input type="text" value=""/>
* TANF Services: <input type="text" value="Yes"/>	* SSI 1619(b): <input type="text" value="Yes"/>	TANF Type: <input type="text" value="BB - Broad Based Categorical Eligibility"/>
* Outpatient Drug / Alcohol Treatment: <input type="text" value="Yes"/>	Tribal Income exempt for MA?: <input type="text" value="Yes"/>	

Individual
Updated on or before

Based on client's response, populate blank fields as N

The tribal income question on the Benefits Received page is intended as an indication to workers that the member has reported that they have an exempt income type.

The exempt income will usually be reported as a distinct type of employment, self-employment or unearned income (for example, self-employment income from fishing). In rare situations, it may be reported as part of another income amount, such as self-employment (for example, if a portion of someone's self-employment earnings are from selling items of cultural significance) or a per-capita payment from a tribe that is based on gaming revenue, as well as other sources.

If someone reports that they have exempt tribal income, "Yes" should be selected from the dropdown. When navigating off of the page, a warning will appear on the Benefits Received page to remind the worker to disregard the exempt income when determining MA and/or BC+ eligibility. If someone has already reported this type of income and "Yes" has been selected, a warning message will also appear upon load of the page:

Benefits Received Cancel Reset

The following events have occurred:

⚠️ AE561: The response to 'Non-gaming Tribal Income' has changed to Yes. CARES will not reduce the income for this individual. Make sure you deduct this income from the Employment, Self Employment or Unearned Income page for BC+ and/or Medicaid.

Total: 1

Benefits Received [1 of 2]

Effective Period

Begin Month: 04 / 2014 Last Updated: 04/03/2014

Additional Information

Individual: 33F PP

Has the individual received any of the following benefits?

* Other State SNAP:	<input type="text"/>	* Verification:	<input type="text"/>
* Tribal Commodities:	<input type="text"/>	* Verification:	<input type="text"/>
* SSDI Payments:	<input type="text"/>	* Verification:	<input type="text"/>
* SSI Payments:	No	* Verification:	<input type="text"/>
* SSI Letter:	<input type="text"/>	* Verification:	<input type="text"/>
* Foster Care/Subsidized Guardianship:	No	* Verification:	<input type="text"/>
* Foster Care Court Order?:	<input type="text"/>	* Verification:	<input type="text"/>
* QDWI Referral:	No	* Verification:	<input type="text"/>

It should be counted for FoodShare (FS), Child Care (CC) or **Wisconsin Works (W-2)** but not BC+ or MA:

Earned income: Enter the income on the Employment Page. Update the Override MA Gross Amount and Override BC+ Taxable Amount fields to zeros. You will also need to update the Month Override Hours. This can be the same as the hours listed in the Monthly Total Hours.

Unearned income: Use the following codes as appropriate to enter the exempt income on the Unearned Income Page so that it counts only for programs other than BC+ and MA:

- OTFS: Other-FS Only
- OTTF: Other-TANF Only **(must be used for CC or W-2)**

Self-Employment: As described above, in rare instances, exempt income may be reported as a part of a self-employment business that also has non-exempt income. In this situation, the non-exempt income should be entered on the Self-Employment page in the Gross Income Field. The amount exempt for BC+ and MA should then be entered on the Unearned Income Page as OTFS or OTTF, depending on the programs requested.

For examples, see Operations Memo 14-14.

ACCESS CHANGES:

ACCESS Apply For Benefits will be updated to collect the following APTC-related information for applications with a health care request:

1. Yearly Income:

- Whether anyone in the household has income that changes month-to-month
- If there is someone whose income changes month-to-month, the name of the individual
- The expected income amount for the current year for that person
- Whether the income for that person will be different next year
- If the income is expected to be different the next year, the expected income amount for next year

2. Tribal Information:

- Whether the applicant has received health care from IHS or a tribal health program
- If the applicant is a member of a federally recognized tribe
- If the applicant is a member of a federally recognized tribe, the name of that tribe
- Whether the tribal member has non-gaming tribal income that is exempt for BC+ or MA eligibility determinations

3. Medical Coverage:

- Whether the insurance is provided by a current employer
- If the health insurance is through an employer, the employer name, address, and FEIN (if known)
- If the health insurance is not through an employer, whether the insurance is through Peace Corps, TRICARE, Veterans Health Administration Programs, Private Health Insurance Plan, COBRA Continuation coverage, Retiree Health Plan or Past Employment.
- The name of the insurance plan (for example "Gold Plan")

Questions will also be removed from ACCESS Apply For Benefits, Report My Changes and Renew My Benefits as required by CMS. The questions include:

- Child Support
- Money from Other Person
- Veteran Benefits
- Workers Compensation
- Details about Supplemental Security Income payments (this change will be made to AFB only)
- Child support payments to someone outside of the household

Note that for Report My Changes and Renew My Benefits, the questions will only be removed when all of the assistance groups on the case have their eligibility determined under Modified Adjusted Gross Income (MAGI) rules.

FNS REQUIRED CHANGES:

Wisconsin will change ACCESS Apply for Benefits in response to Wisconsin's Corrective Action Plan from USDA's Food and Nutrition Service (FNS). FNS requires that questions about health insurance and tuberculosis should not be required questions for a FoodShare-only application. These questions will be optional for a FoodShare-only request. Required updates also include the addition of explicit instructions informing FoodShare applicants of the option to set their filing date with just a name, address and signature.

CONTACTS:

BEPS CARES Information & Problem Resolution Center

*Program Categories – FS – FoodShare, MA – Medicaid, BC+ – BadgerCare Plus, SC – Senior Care, CTS – Caretaker Supplement, FSET – FoodShare Employment and Training

DHS/DHCAA/BEPS/ CW, LA, AA