



Date: May 10, 2017

DMS Operations Memo 17-22

To: Income Maintenance Supervisors
Income Maintenance Lead Workers
Income Maintenance Staff
FSET Agencies
Job Center Leads and Managers

Affected Programs:	
<input checked="" type="checkbox"/> BadgerCare Plus	<input checked="" type="checkbox"/> Caretaker Supplement
<input checked="" type="checkbox"/> FoodShare	<input checked="" type="checkbox"/> FoodShare Employment and Training
<input checked="" type="checkbox"/> Medicaid	
<input type="checkbox"/> SeniorCare	

From: Rebecca McAtee, Bureau Director
Bureau of Enrollment Policy and Systems
Division of Medicaid Services

Enhancements to the Income Maintenance Management Reporting Tool

CROSS REFERENCE

- Process Help, [Section 3.15 Income Maintenance Management Reporting \(IMMR\)](#)
- Operations Memo [13-28](#)

EFFECTIVE DATE

May 27, 2017

PURPOSE

This Operations Memo announces enhancements to the Income Maintenance Management Reporting (IMMR) tool, including a new home page, report search tool, and Usage Tracking Report.

BACKGROUND

The IMMR tool creates up-to-date reports, such as caseload, program participation, and timely processing, using data from CARES Worker Web. On May 27, 2017, the Wisconsin Department of Health Services will be enhancing the IMMR tool to enable users to more easily identify, access, and evaluate information.

POLICY

There is no change in policy associated with this Memo.

INCOME MAINTENANCE MANAGEMENT REPORTING

A new home page, report search tool, and Usage Tracking Report will be available for FoodShare, Medicaid, and the FoodShare Employment and Training (FSET) program. These features will be available to all users with access to IMMR, and existing access will not change.

ACCESSING THE INCOME MAINTENANCE MANAGEMENT REPORTING TOOL

A link titled “IMMR” will be added to the [Income Maintenance/Workforce Development Systems Gateway page](#). Users with IMMR access can click this new link to go to the IMMR tool.

Income Maintenance / Workforce Development Systems Gateway

[EM Home](#) [CC Home](#) [Help](#) [Add this Page to Favorites](#)

ACCESS Access to Eligibility Support Services	Control-D Control-D	FSDW FoodShare Data Warehouse	W-2 Plans Wisconsin Works (W-2) Plans
ACD Automated Case Directory	CSAW Child Care Statewide Administration (Web)	HOD Host On-Demand Internal / External	WAMS Web Access Management System
ASSET Employment and Training System	CWW CARES Worker Web / Availability Calendar	IMMR Income Maintenance Management Reporting	WebI Web Intelligence
BRITS Benefit Recovery Investigation Tracking System	CWW - Training Training Environment	JAMA CARES Application Lifecycle Management Tool	WISA Wisconsin Integrated Security Application
BST Barriers Screening Tool	DWD IDs DWD/Wisconsin Logon Management System	JIRA CARES Application Lifecycle Management Tool	WISCCRS Wisconsin Child Care Regulatory System
CATS CATS PCR Tracking System	EATS Emergency Assistance Tracking System	Learning Center DCF / DHS Learning Center	YoungStar Child Care Provider Ratings
CCPI CC Provider Information	ECF Electronic Case File	MyWiChildCare Parents MyWiChildCare Parent Portal	Technical Information <ul style="list-style-type: none">Agency Workstation RequirementsAgency IE-11 Upgrade Guide for IT StaffECF Login Validation and Troubleshooting
Child Care Provider Portal Child Care Provider Portal	ForwardHealth iC ForwardHealth interChange for IM Agencies / State Staff	SAVE Alien Verification System	

NOTE: Access to CARES, EBT, EOS and KIDS may vary from agency to agency. Please continue to access these systems the way you have in the past. For help on these mainframe systems, contact your agency IT staff.

[Disclaimer](#) | [Website Policies](#) | [Need to Add or Update a Link?](#)

Figure 1 Income Maintenance/Workforce Development Systems Gateway Page

A user who has DHS folder access can log in to the IMMR home page using his or her Web Intelligence (WebI) login credentials. If a user who does not have DHS folder access attempts to log in using WebI credentials, an error message will be displayed. If a user needs access to IMMR, his or her agency security officer should complete a [CARES Automated Systems Access Request](#) (F-00476) and send it to DHS CARES Security.

NEW HOME PAGE

A new home page will provide improved access to important statistics and reports. The IMMR home page is divided into a “Header” section, a “Key Metrics” section, and a “Reports” section that is customized for each user.

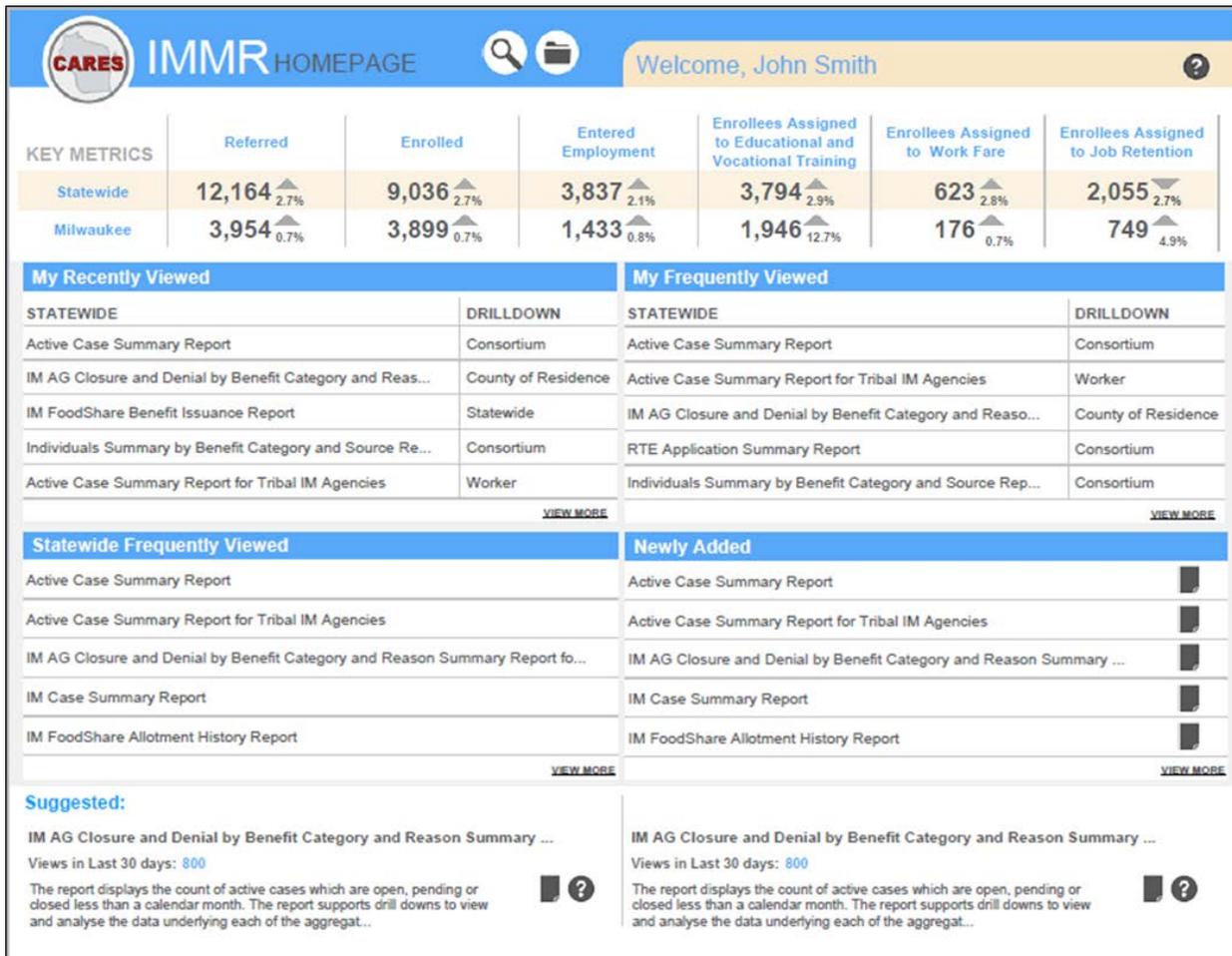


Figure 2 IMMR Home Page

HEADER SECTION

The “Header” section will display a welcome message and provide the following links:

- A magnifying glass icon—a link to the report search tool.
- A folder icon—a link to the IM Management Reports folders.
- A question mark icon—a link to the report help page.



Figure 3 Home Page Header

KEY METRICS SECTION

The “Key Metrics” section will display statistics for the most recently available month and changes to the previous month’s data. The home page will display different sets of Key Metrics for IM users and FSET users.

Income Maintenance Users

KEY METRICS	Active Case Count	Recipient Count	Application Timeliness	Renewal Timeliness	Average Renewal Processing Time
Statewide	681,175 [▲] 2.7%	990,876 [▲] 2.7%	94% [▲] 2.9%	88% [▲] 2.8%	14 [▼] 2.7 days
MILES	197,170 [▲] 0.7%	455,785 [▲] 0.7%	92% [▲] 12.7%	90% [▲] 0.7%	13 [▲] 4.9 days

Figure 4 Key Metrics for IM Users

Key metrics for IM users include the following:

- Active Case Count—the count of all active cases across consortia and tribal IM agencies. Active cases are those that are open, pending, or closed less than one calendar month.
- Recipient Count—the total distinct count of people (adults and children) receiving benefits for the current calendar month. The recipient count does not include people receiving Child Care, Wisconsin Works, or SeniorCare benefits.
- Application Timeliness—the number of applications processed, while the work item end date is on or before the due date, divided by the total applications processed. Application timeliness is expressed as a percentage.
- Renewal Timeliness—the number of renewals processed, while the work item end date is on or before the due date, divided by the total number of renewals processed. Renewal timeliness is expressed as a percentage.
- Average Renewal Processing Time—the average number of days to process a renewal work item divided by the total number of renewal work items processed.

FoodShare Employment and Training Users

KEY METRICS	Referred	Enrolled	Entered Employment	Enrollees Assigned to Educational and Vocational Training	Enrollees Assigned to Work Fare	Enrollees Assigned to Job Retention
Statewide	12,164 [▲] 2.7%	9,036 [▲] 2.7%	3,837 [▲] 2.1%	3,794 [▲] 2.9%	623 [▲] 2.8%	2,055 [▼] 2.7%
Milwaukee	3,954 [▲] 0.7%	3,899 [▲] 0.7%	1,433 [▲] 0.8%	1,946 [▲] 12.7%	176 [▲] 0.7%	749 [▲] 4.9%

Figure 5 Key Metrics for FSET Users

Key metrics for FSET users include the following:

- Referred—the count of people having the enrollment status of “Referred” as of the current calendar month.
- Enrolled—the count of people with the enrollment status of “Enrolled” as of the current calendar month.

- Entered Employment—the count of all FSET enrollees with an active employment record for whom the entered employment indicator has been changed to “Yes” as of the current calendar month.
- Enrollees Assigned to Educational and Vocational Training—the count of FSET enrollees assigned to an educational and vocational training activity in the current calendar month.
- Enrollees Assigned to Work Fare—the count of FSET enrollees assigned a workfare activity in the current calendar month.
- Enrollees Assigned to Job Retention—the count of FSET enrollees assigned a job retention activity in the current calendar month.

REPORTS SECTION

The “Reports” section will display links to reports that are useful to the user. The reports displayed on the home page will automatically change based on the reports the user frequently accesses.

My Recently Viewed		My Frequently Viewed	
STATEWIDE	DRILLDOWN	STATEWIDE	DRILLDOWN
Active Case Summary Report	Consortium	Active Case Summary Report	Consortium
IM AG Closure and Denial by Benefit Category and Reas...	County of Residence	Active Case Summary Report for Tribal IM Agencies	Worker
IM FoodShare Benefit Issuance Report	Statewide	IM AG Closure and Denial by Benefit Category and Reaso...	County of Residence
Individuals Summary by Benefit Category and Source Re...	Consortium	RTE Application Summary Report	Consortium
Active Case Summary Report for Tribal IM Agencies	Worker	Individuals Summary by Benefit Category and Source Rep...	Consortium
VIEW MORE		VIEW MORE	
Statewide Frequently Viewed		Newly Added	
Active Case Summary Report		Active Case Summary Report	
Active Case Summary Report for Tribal IM Agencies		Active Case Summary Report for Tribal IM Agencies	
IM AG Closure and Denial by Benefit Category and Reason Summary Report fo...		IM AG Closure and Denial by Benefit Category and Reason Summary ...	
IM Case Summary Report		IM Case Summary Report	
IM FoodShare Allotment History Report		IM FoodShare Allotment History Report	
VIEW MORE		VIEW MORE	
Suggested:			
IM AG Closure and Denial by Benefit Category and Reason Summary ... Views in Last 30 days: 800 The report displays the count of active cases which are open, pending or closed less than a calendar month. The report supports drill downs to view and analyse the data underlying each of the aggregat...		IM AG Closure and Denial by Benefit Category and Reason Summary ... Views in Last 30 days: 800 The report displays the count of active cases which are open, pending or closed less than a calendar month. The report supports drill downs to view and analyse the data underlying each of the aggregat...	

Figure 6 Reports Section

The “Reports” section will display the following subsections:

- “My Recently Viewed”—the five reports most recently viewed by the user. Users can click the report name to navigate to the landing page of the report. Each report will include a drilldown link to the most recently visited subreport level of that report, such as county, consortium, or worker.
- “My Frequently Viewed”—the five reports most frequently accessed by the user. Users can click the report name to navigate to the report. Each report will include a drilldown link to the most recently visited level of that report, such as county, consortium, or worker.
- “Statewide Frequently Viewed”—the five reports most frequently accessed by all users across the state. Users can click the report name to navigate to the report.
- “Newly Added”—recently added IMMR reports accessible based on the user’s profile. Users can click the document icon next to the report name to preview a report sample prior to running it.

- “Suggested”—two reports that the user may find useful. The first suggested report will be a report the user has not recently run that closely matches the search criteria of reports the user does frequently run. The second suggested report is a popular report frequently accessed statewide that the user has not recently run.

Users can click the View More buttons in the “My Recently Viewed,” “My Frequently Viewed,” “Statewide Frequently Viewed,” and “Newly Added” sections to display expanded lists of up to 20 reports.

NEW REPORT SEARCH TOOL

The report search tool will enable users to display a list of reports based on the programs and business functions associated with the reports. Users can click the magnifying glass icon in the “Header” section of the home page to open the report search tool.

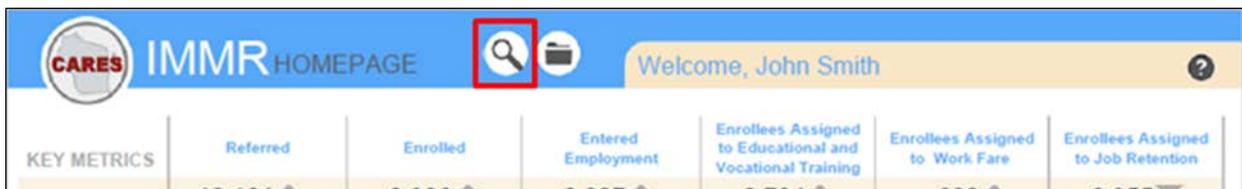


Figure 7 Accessing the Search Tool Using the Magnifying Glass Icon

Note: Users can also select the report search tool in the IM Management Reports folder.

When the report search tool opens, the user can choose Select Program(s), Select Health Care Sub-Program(s), or Select Business Function(s) to display the options available within each choice. The user can add multiple programs, health care subprograms, and business functions by selecting a value from the center column and clicking the arrow to move it to the column on the right.

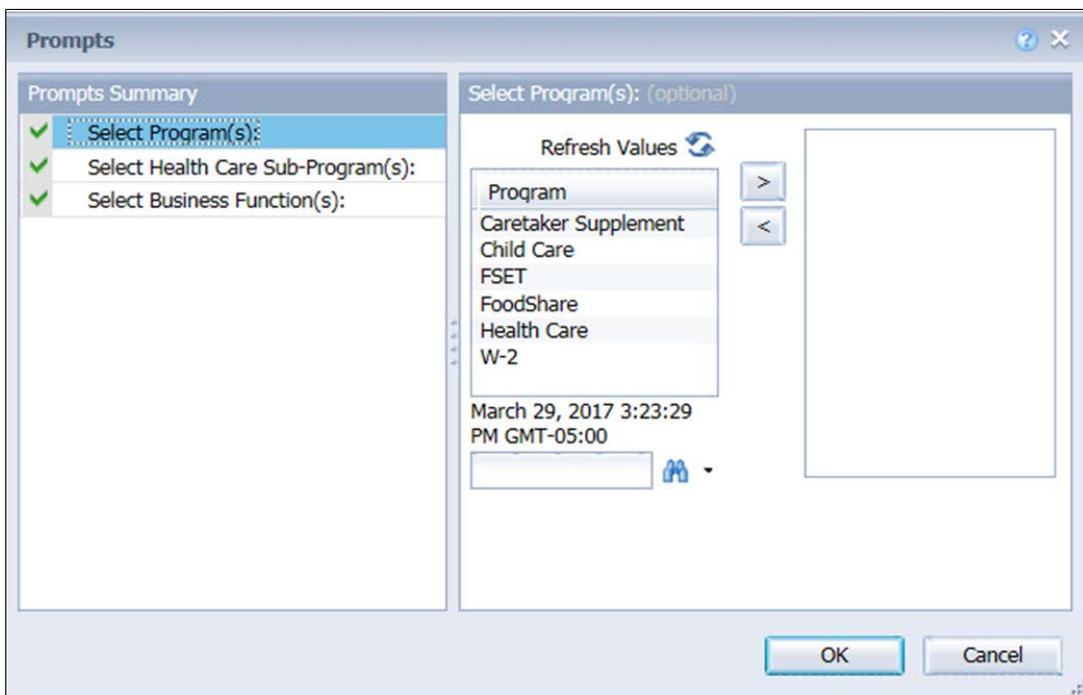


Figure 8 Report Search Tool With Select Program(s) Option Selected

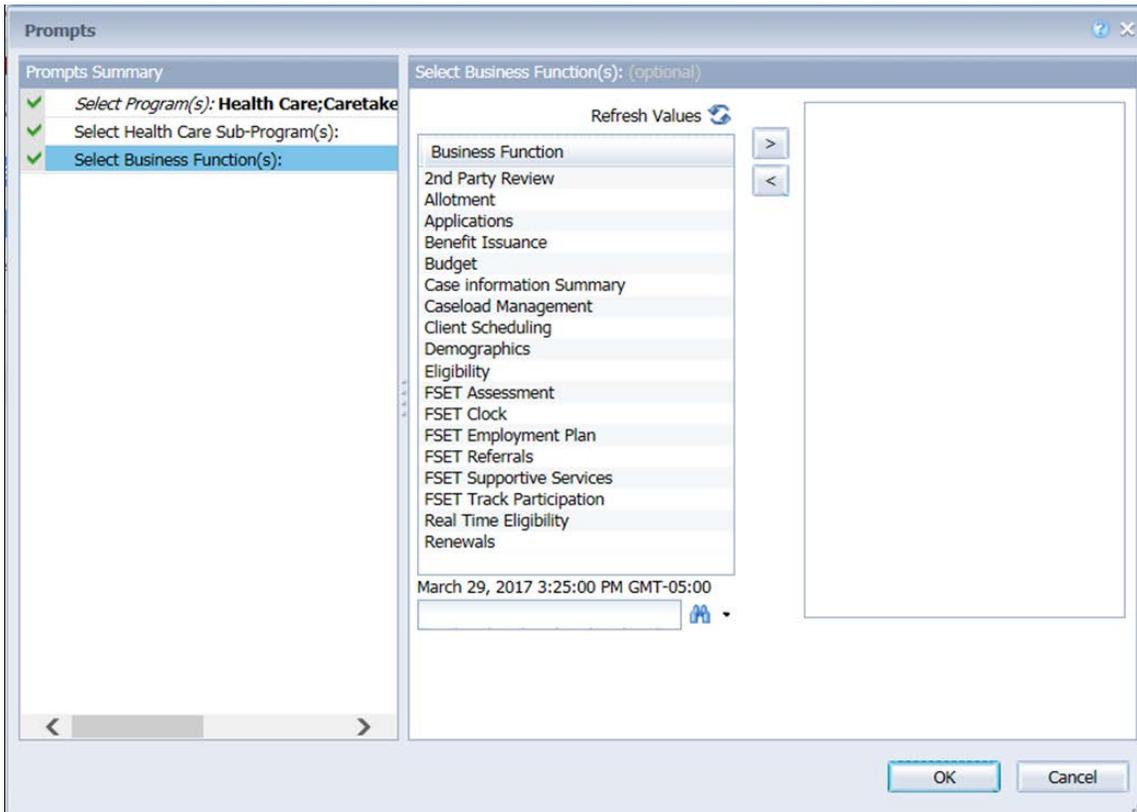


Figure 9 Report Search Tool With Select Business Function(s) Option Selected

After selecting programs and functions, users can click **OK** to display the search results.

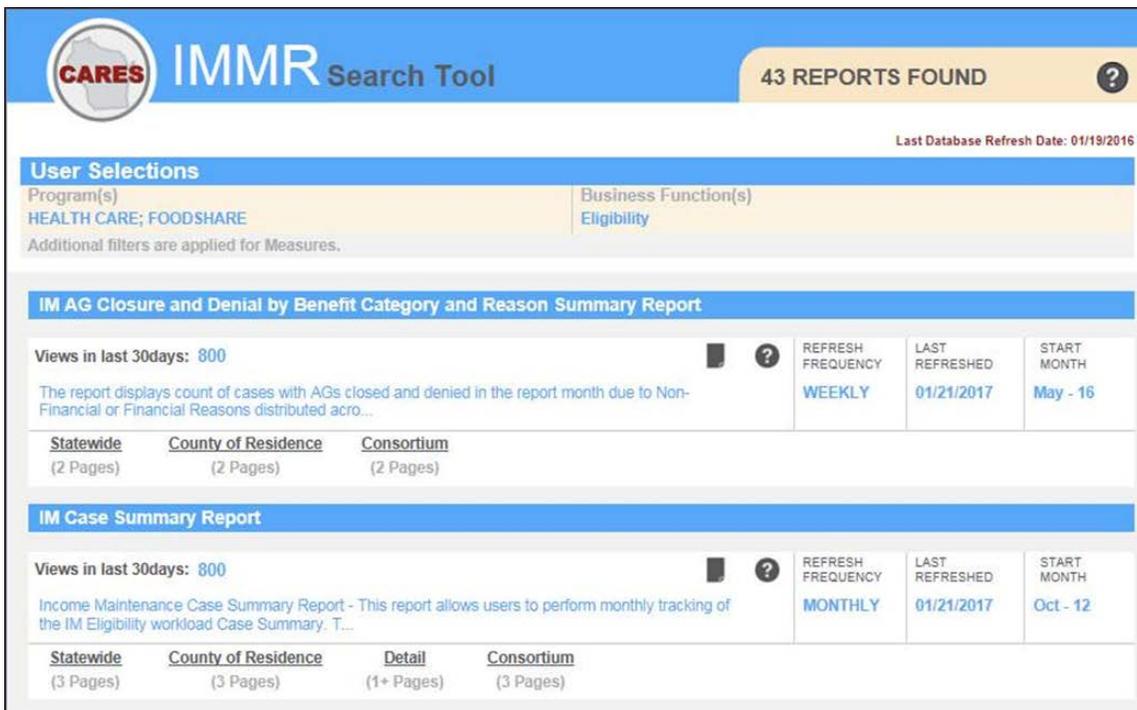


Figure 10 Report Search Tool Results Page

The Report Search Tool Results page displays the number of reports found, the search criteria that the user selected, and the list of reports matching the user’s search criteria.

Each report in the search results displays the following:

- Report Name.
- Views in last 30 days—the number of times the report was viewed by a unique user in the last 30 days.
- Sample Report—a document icon that links to an example of the report.
- Report Help—a question mark icon that links to the report help page.
- Report Description—a short explanation of the report’s purpose and scope.
- Refresh Frequency—how often the report data is updated.
- Last Refreshed—how recently the report data was updated.
- Start Month—the first month the report was available.
- Report Level Drilldowns—links to subreports, such as Statewide, Consortium, or Detail.
- Report Page Count—the number of report pages available for each report level drilldown link. Report page counts are not displayed for worker and detail reports.

Users can export results for their reference and for searching.

NEW USAGE TRACKING REPORT

A new Usage Tracking Report will provide user and report performance statistics for IMMR reports. The initial view is statewide and lists IMMR reports sorted by most frequently viewed to least frequently viewed. The information in the Usage Tracking Report can help users determine report usage patterns and report usefulness.



Figure 11 IMMR Usage Tracking Statewide Overview

The Usage Tracking Report displays a statewide overview that includes:

- Key Statistics—information about report usage, transactions, and report processing time.
- User Selections—the options selected by the user to generate the report.
- Drilldown Links—links that allow the user to display the report Group Usage Summary for the selected link.
- Statewide Report Usage—links to subreports in descending order by usage.

As in other IMMR reports, users can drill down to view usage by specific geographies, such as IM consortium, FSET regions, and counties.

Users can access the Usage Tracking Report by clicking the IMMR Usage Tracking Report link on the expanded Statewide Frequently Viewed Reports page.

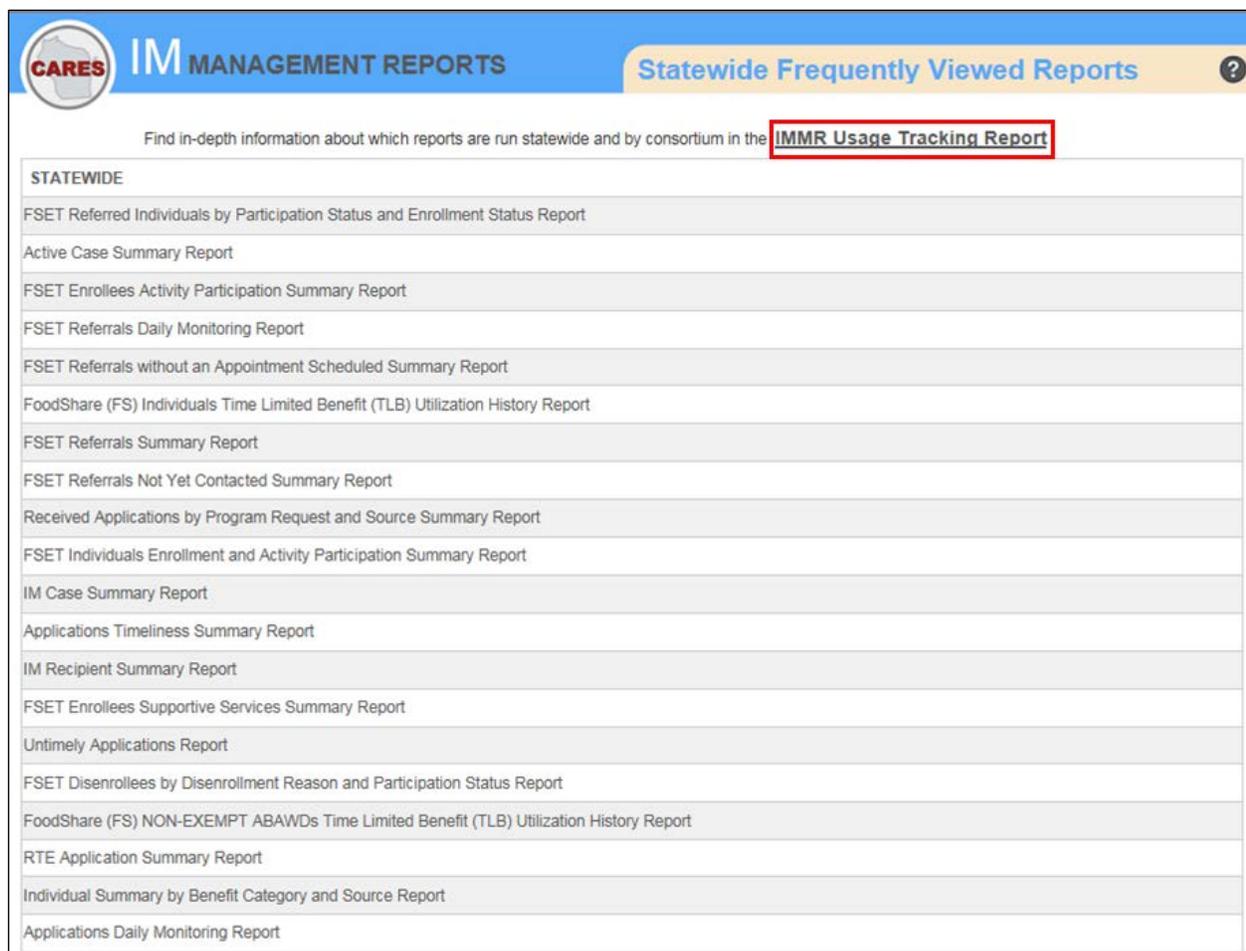


Figure 12 IMMR Usage Tracking Report Link on Statewide Frequently Viewed Reports Page

REPORT HELP

Users can click the question mark icon at the top of a report page to access detailed descriptions of report elements and instructions for using the report.

DMS Memo 17-22

May 10, 2017

Page 10 of 10

CONTACTS

BEPS CARES Information and Problem Resolution Center

DHS/DMS/BEPS/TT