



Real-Time Eligibility Project Update

Autumn Arnold & Emily Carlson
Bureau of Enrollment, Policy &
Systems (BEPS)

June 18, 2015



Agenda

- Overview of Real-Time Eligibility (RTE).
- Introduction of new status page in CWW.
- Agency choices for caseload management.
- Timeline and process for making these choices.
- Next steps.



Real-Time Eligibility (RTE)

- Required by the Affordable Care Act.
- Allows certain applicants to receive an automated, real-time eligibility determination for BadgerCare Plus (BC+) and/or Family Planning Only Services (FPOS).
- Leverages existing CARES infrastructure.
- Leverages new and existing data exchanges to verify member-reported information.
- Planned for October 24, 2015.



Development of RTE

- Review of each data element in CARES to determine how to complete an accurate eligibility determination based on member-reported information.
- Collaboration with other program areas to minimize adverse impact on programs administered through CARES.
- Input from Income Maintenance (IM) agencies regarding caseload management needs and changes to ACCESS Apply for Benefits.



Who can get RTE?

- Only certain applicants will be able to get RTE determinations.
- Applications will be “pre-screened” in ACCESS to see if they can get RTE.
- The application will not be eligible for RTE if, for example:
 - Someone is already on an open or recently closed case or an unprocessed ACCESS submission (like a change or renewals).
 - Someone does not provide a Social Security Number (SSN).
 - The application is missing information.
 - Someone reports self-employment income.
 - The household reports an out-of-state home or mailing address.



Processing in CWW

- If an applicant does **not** pass RTE pre-screening, it will look like a “regular” ACCESS application and will be processed normally.
- If an applicant **does** pass RTE pre-screening, Automated Case Processing (ACP) will begin. This new process automates:
 - Creation of the Request for assistance (RFA) and case.
 - Case level and individual level clearance.
 - Data entry through the application driver flow.
 - Determination of eligibility.
 - Confirmation of benefits for BC+ and FPOS.
- The next step will depend on whether the application can be completed and all benefits confirmed via ACP.



ACP Complete cases

- If BC+ and FPOS are the only requested benefits, and these can be approved or denied, it is considered an “ACP Complete” case and no worker follow-up is needed.
- The case will not appear in the inbox or dashboard.
- The case will be assigned automatically to a caseload based on agency preference.
 - It will remain in that caseload until reassigned.
- It will remain as an open or closed case until an action is taken that affects eligibility.
 - For example, the member reports a change on an open case or the applicant reapplies.



ACP Complete case assignments

- For each office, agencies need to choose whether ACP Complete cases will be assigned to:
 - The transfer coordinator, OR
 - A general ACP caseload
 - An ACP Complete caseload
- Agencies can search for and reassign ACP Complete cases using Caseload Management and Caseload Search.
- Alerts, documents, correspondence will be based on the case's assigned caseload.



Cases needing follow-up

- An application may pass RTE screening and begin the ACP process, but benefits cannot be confirmed. For example:
 - There is a FoodShare (FS) or Child Care (CC) request on the application.
 - Someone on the application may qualify for Medicaid for the Elderly, Blind or Disabled (EBD MA).
 - BC+ or FPOS could not be confirmed. For example:
 - Verification is needed.
 - A premium is required.
 - An exception or other system failure occurred.
- These are considered “Worker Follow-up cases” and are subject to the same processing standards as other applications.



Worker Follow-up cases

- The case will appear as “assigned” in the inbox and dashboard.
- The case will be assigned automatically to a caseload based on agency preference.
- These cases will require varying degrees of worker action.
 - For some, another program request (FoodShare, Child Care or EBD MA) will need to be processed.
 - For others, a VCL will need to be issued or a premium collected.
- Follow-up actions will be listed on a new “ACP Status” page.
 - Workers will use this page to start processing the follow-up items.
 - Once a worker has started the follow-up items, the case will no longer appear in the inbox or on the dashboard.



New ACP Status page

CARES Worker Web User ID: XCTZ99 User Name: D MALIK Quick Select: CASE/RFA

Primary Person: DANISH MALIK 23M PP Case: 5002717659 Status: Open Mode: Ongoing 3.5 03/13/2015

▶ Action Items (2) ▶ Documents (0) ▶ Discrepancies (0) ▶ Work Items (1)

Automated Case Processing Status

Automated Processing Summary

ACCESS Application Number:	3701299838 <input type="button" value="View"/>	Submission Date:	03/05/2015
Updated by:	ACPCWW	Last Updated:	03/05/2015

Follow-Up Actions

Action Needed	Programs
Continue processing application at Permanent Demographics page	N/A

Update Agency Information

* Office:

* Worker ID:

What would you like to do?

Complete follow-up actions

Navigation Menu

- Search
 - CARES Home
 - Search
 - Inbox Search
 - Unlinked Documents
- RFA / Case
 - Client Registration (0)
 - Basic Information
 - Additional Data
 - Program Requests
 - Priority Service Determination
 - Print Application Registration
 - Complete Request
 - RFA Comments
 - RFA Summary
 - Case Summary
 - Case Comments
 - Expected Changes
 - Application Entry (0)
 - Generate Summary
 - Initiate Eligibility Determination



Other CWW updates

- The inbox and inbox search will be modified to support ACP cases needing worker follow-up.
- The dashboard will be modified to display ACP cases needing worker follow-up.
 - Note that these will not be distinct dashboard items.
- Alerts will be set for ACP cases requiring worker follow-up and for those that are ACP Complete.
- Based on these alerts, Worker Follow-up cases will be searchable on the Caseload Management and Caseload Assignment pages.



Worker Follow-up case options

- For each office, agencies need to choose whether Worker Follow-up cases will be assigned to:
 - The transfer coordinator
 - A general ACP caseload
 - A Worker Follow-up ACP caseload
- Agencies can search for and reassign Worker Follow-up cases using the Inbox, Dashboard, Caseload Management and Caseload Assignment pages.



Agency Survey

- DHS will provide a survey to agencies by July 15, 2015.
 - This will ask you to indicate (at an office level) the permanent caseload to which ACP Complete and Worker Follow-up cases should be assigned.
- Agencies need to respond by August 21, 2015.
- If we do not receive a response for your agency, the assignments will be defaulted to the transfer coordinator.
- Assignments can be changed if needed.
 - Agencies will be responsible for notifying the CARES security team if a caseload assignment change needs to be made.



Considerations

- Assigning ACP Complete and Worker Follow-up cases to different caseloads will help to maintain separate work streams for these applications.
- Setting up one or more ACP caseloads, if desired, will be the agency's responsibility.
- Agencies will need to contact the CARES security team to create a new permanent caseload.
- These new caseloads need to have information appropriate for populating MyACCESS and client correspondence.
- On an ongoing basis, agencies will need to consider the ACP assignment impact of staffing changes.



Questions?
