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INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

Thursday, November 19, 2015

1:00 – 3:30 p.m.

Dane County Job Center, 1801 Aberg Avenue - Ballroom, Madison, WI 53704

Or online at <https://connect.wisconsin.gov/imac/>

For audio, dial 888-808-6929, access code 468-5307

MINUTES

Non-State Attendees:

Jenny Hoffman, Bay Lake / Brown Co.	Carol Wautlet, Bay Lake / Door Co.
Kris Parkansky, Bay Lake / Marinette Co.	Melissa Duane, Capital / Columbia Co.
Michele Chiuchiolo, Capital / Dane Co.	Maria Flores, Capital / Dane Co.
Kara Ponti, Capital / Dane Co.	Tony Sis, Capital / Dane Co.
Roxana Vega, Capital / Dane Co.	Cindi Flynn, Capital / Adams Co.
Amy Beranek, Capital / Dodge Co.	Stephanie Ronnfeldt, Capital / Richland Co.
Annett Mooney, East Central / Marquette Co.	Tim Gessler, East Central / Sheboygan Co.
Chris Machamer, East Central / Waupaca Co.	Ann Kriegel, East Central / Winnebago Co.
Linda Struck, Great Rivers / Eau Claire Co.	Ronda Brown, Great Rivers / St. Croix Co.
Jane Huebsch, IM Central / Marathon Co.	Amy Mayo, IM Central / Oneida Co.
Mandy Mayek, IM Central / Portage Co.	Rachel Pantaleo, Moraine Lakes / Ozaukee Co.
Melody Larson, Moraine Lakes / Walworth Co.	Brenda Zweck, Moraine Lakes / Walworth Co.
Sandy Potter, Moraine Lakes / Washington Co.	Doreen Lang, Northern / Wood Co.
Marlin Harms, Southern / Iowa Co.	April Heim, Southern / Rock Co.
Jill Johnson, Southern / Jefferson Co.	Lorie Graff, Western / LaCrosse Co.
Adelene Greene, WKRP / Kenosha Co.	Kimm Peters, WKRP / Kenosha Co.
Claribel Camacho, WKRP / Racine Co.	

State Attendees:

Abby Abernathy, DHS	Linda Alexander, DHS
Autumn Arnold, DHS	Mic Brownlow, DHS
Becky David, DHS	Antonio Esterrich
Matt Fanale, DHS	Brian Fangmeier, DHS
Jamie Fawcett, DHS	Bill Hanna, DHS
Lisa Hanson, DHS	Nicole Huffman, DHS
Judy Johnson, DHS	Donna King, DHS
Linda Konsella, DHS	Sabrina Mandel, DHS
Mike McKenzie, DHS	Fratney Miller, DHS
Marina Olivencia, DHS	Chris Partridge, DHS
Melissa Pisczor, DHS	Vanessa Robertson, DHS
Tony Trout, DHS	Kathleen Vieira, DHS
Jayne Wanless, DHS	Rachel Witthoft, DHS
Debbie Waite, DHS	

1. Administrative Issues – Debbie Waite & Jenny Hoffman
 - Attendance for remote attendees, email Linda Alexander and on-site attendees, sign attendance sheet.
2. Approval of October 15, 2015 Meeting Minutes – Debbie Waite
 - Motion to approve, seconded and passed by voice vote.
3. IRS1095-B Form – Rachel Witthoft (Handout)
 - See ‘IRS-B Form’ and ‘1095-B’ handouts’ for more detail.
 - Rachel will present CARES Worker Web information to the IMAC IT Subcommittee with more detail on 12/4/15.
 - Call Center Anywhere (CCA) messaging will be addressed at an upcoming CCA Subcommittee meeting.
 - Agencies will have the ability to correct and/or re-issue 1095-B forms as appropriate. One example of this is if client has a name change. Another is if they lose or misplace their form.
 - Occasional back-dating situation will require forms to be re-issued. An automated weekly process will be run to catch these; will not be necessary for the consortia/agencies to handle/identify.
 - Completed forms will be searchable on CARES.
 - Call scripts availability targeted for early January, 2016.
 - If early (tax) filers file without the MEC information, the 1095-B shows a different number of coverage months, so these people may have to file an amendment.
 - Messaging and script decisions will be made at the 11/30/15 CCA subcommittee meeting.
 - Will be discussing a special routing/messaging for questions and calls about the 1095-B form.
4. ‘Add a Program’ Update – Rachel Witthoft
 - Enhancements were implemented by 11/15/15.
 - 7.2% (or 2,073) of applications in November through 11/15/15 were for add-a-program.
 - CARES Call Center (CCC) is fielding questions on the program.
 - Feedback to CCC: it can be difficult to identify add-a-program applications when they are mixed in with other applications. One recommendation was to have add-a-program applications funneled to a designated worker. Also recommend segregating on the Dashboard.
 - Applications require worker intervention – assigned to a worker but the call is not scheduled. A possible solution is to have the in-box worker search for the add-a-program applications.

- Rachel will share this detail with appropriate DHS staff. Discussions were held but this particular issue didn't come to light.
 - A fix for a broken link to a banner is imminent. Currently providing a work-around.
5. Real Time Eligibility (RTE) Update – Autumn Arnold / Becky David
- Implementation was on 11/8/15; now two weeks into the implementation.
 - The 10/26/15 pilot enabled the program features to be tested despite a very low volume. A few items were corrected before releasing statewide.
 - The first day applications went to the agencies was 11/9/15. Approximately 20% of the 1,300 ACCESS applications received made it to the RTE process, and about 10% of those were Automated Case Processing (ACP)-complete. Of the 90% that required follow-up, most were related to other programs (e.g., ChildCare).
 - Autumn asked if any consortia had gotten any feedback on whether a temporary card was being accepted. Consortia said none at this time.
 - Although it is early in the implementation, some issues with caseload assignments and functionality have been identified.
 - Another issue is how children are being identified in old cases: a 'one-step delete' problem.
 - Worker in-boxes are also show a significant number of the wrong codes (ACP instead of RTE).
 - State Wage Income Collection Agency (SWICA) matches are identifying some applicants who did not report employment. Remember that SWICA data is about six months old. End-dating causes the message to follow-up. Consortia said it would be helpful to "un-end-date." This is being explored.
 - Issues with transferred cases - Alerts for worker follow-up stay in the county's mailbox as if the case has not been assigned. This has been identified and sent to IT for a solution, but none at this time.
6. 60-Day Renewal Project / Clarification of FoodShare Renewal Verification Policy – Becky David & Julie (Zastrow) Taylor
- New terminology is "Clarification of FoodShare Renewal Verification Policy" instead of the old "60-Day Renewal."
 - The 60-day application verification is similar to a break-in-service. Allows the member to turn in the verification by the end of the second month.
 - Food and Nutritional Service (FNS) required a correction so text has been added to the letters to communicate this requirement.
 - New reason codes have been added: "727 = Interview not completed;" "728 = Interview has been completed."
 - If the interview is not completed by the last day of the month but is by the first day of the following month, must update the filing date or the result may be that expedited benefits are authorized.
 - The Operations Memo (7 pages) outlines this information and includes screen shots. It also gives examples of scenarios when clients call to complete their interview. Another issue addressed is the timeliness measure impact with adjusting the filing

date. The Ops Memo is currently going through the internal review process and is scheduled for release during the second week in December.

- Will go live with the policy on 1/9/16.
7. Local Management Evaluation Report (MER) – Judy Johnson (Handout)
- a) 2015 Summary
 - b) 2016 Planning
 - See the handout “FoodShare Management Evaluation Review” for more details.
 - Difference between the FNS-mandated “Quality Control” and MER is that QC is a random pull of cases where the MER addresses more qualitative measures (office procedures and service areas).
 - Noted the challenges of scheduling MERs to accommodate both consortia’s schedules and efficiency in travel plans.
 - Methodology – The return rate of the MER surveys was excellent due to the use of a link to the survey. Also, consortia did an outstanding job of sending links to advocates or partners.
 - Program Access and Customer Service – A common finding was use of outdated non-discrimination language. Because the non-discrimination language changes regularly, recommend that consortia link to the DHS website to get the most recent information.
 - ABAWD Policy FSET Referral Process – Noted differences in findings among the consortia that could be related to the timing of the MER. MERs occurring later in the year showed fewer issues.
 - Electronic Benefit Transfer (EBT) Vault Card Process – The findings were shared with the EBT staff and manuals are being revised and follow-up with consortia is likely.
 - All MERs were sent and now awaiting consortia’s feedback on improving error rates.
8. Payment Error Rate Measurement (PERM) Pilot 3 Findings – Donna King, Melissa Pisczor & Brian Fangmeier (Handout)
- See handout “Payment Error Rate Measurement (PERM) Pilot 3 Results” for more details.
 - Note - CMS requires separation of Title 21 and Title 19.
 - Note - The sample size of various pilots was small (250 cases), so accuracy rate of 99.9% is impacted accordingly.
9. Presumptive Disability – Case Review Follow-up – Brian Fangmeier, Donna King & Mic Brownlow (Handout)
- See handout “2014 Follow-Up Study to Wisconsin’s 2011 Medicaid Eligibility Quality Control (MEQC) Pilot Project Report” for more details.
 - The MEQC team presented original project findings to IMAC earlier in 2015. Consortia supported doing a follow-up study to see if improvement had occurred since the original review time period.

- Discussion:
 - Eligibility starts when all data/forms are received (“all conditions are met”). This is the day the worker takes action when all data/forms are in hand.
 - Suggest a system update for automatic update of determination.
Action Item: **Brian Fangmeier** will issue a Quick Tip using examples of cases.

10. On-Demand FoodShare Implementation Update – Michelle Furr (Handout)

- See handout “FoodShare On-Demand” for more details.
- Northern Consortium will implement on-demand pilot in January, 2016, within the hours the consortium has established. Benefits include:
 - improved customer service;
 - convenience of schedules for customer and agency;
 - streamlined process;
 - fewer determination errors
- Scheduled interviews are required for some cases (e.g., exceeding three time-limited benefits rule). Consortia can do interviews over the phone instead.
- The scheduling page will remain status quo until the day of the FS On-Demand implementation; then on-demand language will be in the notices.
- Once the interview has been completed, it is acceptable to transfer the case to another consortium, if appropriate.
- The language (mock-up) for on-demand will be made available. The Ops Memo will be released no later than 12/21/15.
- The On-Demand work group meets in early December.
- Consortia Feedback: The earlier that DHS can share information about On-Demand, the better for the consortia to plan for changes in processes. For instance, if a consortium does case banking, how will its processes differ? Round-tables are valuable for the consortia to share best practices or discoveries made that can help others to prepare or learn from the pilots.
- Consortia Question: Can case numbers be projected? Answer: Yes; we will get these and share them.

11. FoodShare Employment Training (FSET) and Able-Bodied Adults Without Dependents (ABAWDs) – FSET Agency Interactions – Michele Dickinson & Jayne Wanless

- Deferred due to time constraints.

12. Internet Explorer 11 – Chris Partridge

- All systems are compatible with Internet Explorer 11.0
- As of 1/16/2016 Microsoft will cease supporting any other browsers.
- DHS is continuing to address responsiveness of all systems: consortia encouraged to use SharePoint to record and report slowness and other issues.
- Progress is being made on having a statewide systems conference.

13. The January (CARES) Release – Becky David

- The 1095-B information referenced earlier is going into CARES. However, approximately 900 applications per month are in ForwardHealth and do not have eligibility in CARES.
- After Thanksgiving, a report will be sent which breaks down data by consortia and by agency.

14. Regional Enrollment Networks (REN) Update – Jenny Hoffman

- Deferred due to time constraints.

15. Income Maintenance (IM) Funding & Contracting Updates – Debbie Waite & Jenny Hoffman

a) FoodShare Bonus / Enhanced Match Funding Update

- An initial teleconference to discuss some new developments in the IM funding area was held with the consortia operational leads and county fiscal managers in November. Rather than going through the state's 13.10 process, alternative funding sources in the form of FoodShare bonus money and enhanced match funding from the federal government have been identified. Consortia submitted questions after the call. DHS staff is drafting and reviewing answers, including the preparation of distribution charts; a follow-up call will be scheduled. The enhanced funding distribution charts are more complex and may take more time to produce than the FoodShare ones.

b) 2016 IM Contracts

- Kevin Moore has signed contracts and they will be mailed to each consortium's contract signatory by the end of the week.
- Once she has received confirmation that the contracts have been mailed, Debbie will send an email to the operational leads with an electronic version and a list of the meaningful changes; this can be used to work with their signatories and their county directors.

16. Consortia Feedback – All

- Will share ideas on FoodShare Employment Training (FSET) Sub-committee and consortia participation with Debbie Waite at another time.
- Federally Facilitated Marketplace (FFM) applications – consortia receiving multiple applications for an individual. Would like Craig Steele to address at December IMAC and provide an overall update. CMS has been made aware of the situation.
- Income Maintenance Operational Assessment (IMOA) update – what should consortia respond to and what is the timeline? Mid-February is the target date. Each focal topic should have some response – those that the subcommittee has not tackled yet can be more general but should include initiatives the consortium may have identified on its own.

17. Operations Memos - Becky David
N/A

18. Residency Verification – Fratney Miller

- An update to the topic first presented in August, 2015.
- Residency verification will go into effect in January, 2016. An Ops Memo is scheduled to be published in early December, 2015.
- Data matching is limited to ABAWD's and whether other programs are in effect.
- Consortia chose a monthly match/exchange (vs. a 6-month matching schedule).
- Actionable items will be sent to the consortia (will remove homeless, nursing home residents or within 3 months of eligible application date).
- In January, the first extract will go to PCG and be sent to consortia via SharePoint. Consortia are expected to research each lead within a 30-day turn-around timeframe.
- Estimating the total number of statewide cases to be about 4,000; after initial distribution, estimate that the monthly number of cases to be around 400 per month.
- Researching leads for possible fraud detection – using EBT files from other states. Will have a drop-down box that worker selects to show outcome of the contact. Can send to OIG for further investigation of fraud.
- Consortia cannot upload the worked report back into SharePoint. Recommend that it be sent to the CARES Call Center.
- Consortia asked that a note be sent to the operational leads when the report goes out.

19. Administrative Memos – Debbie Waite
N/A

20. Sub-committee Updates - Debbie Waite & Work Group Chairs (Handout)

- See handout for more details.

21. Miscellaneous Updates / Other / Public Comment
N/A

22. December 17, 2015 Meeting - Tentative Agenda Topics

- a) FoodShare On Demand
- b) Technology Update – SharePoint & Systems Performance