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INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

Thursday, February 18, 2016

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.	Kris Parkansky, Bay Lake / Marinette Co.
Michele Chuichiolo, Capital / Dane Co.	Ron Redell, Capital / Dane Co.
Kara Ponti, Capital / Dane Co.	Shawn Tessmann, Capital / Dane Co.
Julie Arendsee, Capital / Sauk Co.	John Rathman, East Central / Outagamie Co.
Annett Mooney, East Central / Marquette Co.	Chris Machamer, East Central / Waupaca Co.
Ann Kriegel, East Central / Winnebago 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.	Debra Berg, Moraine Lakes / Waukesha 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.	Naomi Morris, Western / LaCrosse Co.
Adelene Green, WKRP / Kenosha Co.	Claribel Camacho, WKRP / Racine Co.
Mai Le-Yuen, CMS	

State Attendees:

Abby Abernathy, DHS	Linda Alexander, DHS
Autumn Arnold, DHS	Raquel Berkshire, DHS
Emily Carlson, DHS	Becky David, DHS
Elizabeth Dehling, DHS	Tonya Evans, DHS
Matt Fanale, DHS	Michelle Furr, DHS
Nicole Huffman, DHS	Judy Johnson, DHS
Lexi Koliner, DHS	Emily McFarland, DHS
Paul Michael, DHS	Kefah Momanyi, DCF
Jennifer Mueller, DHS	Selina Schmidtka, DCF
Fay Simonini, DCF	Jatinder Singh, DHS
Tony Trout, DHS	John Tuohy, DCF
Debbie Waite, DHS	

1. Administrative Issues – Debbie Waite & Jenny Hoffman
 - a. Attendance for remote attendees, email Linda Alexander and on-site attendees, sign attendance sheet.
 - b. Introduction of Shawn Tessmann as the newest member of the IMAC co-chair group.

2. Approval of January 21, 2016 Meeting Minutes – Debbie Waite
 - a. Motion to approve, seconded and passed by voice vote.

3. Administrative Renewals – Autumn Arnold (Handout)
 - See handout “Administrative Renewals Project Overview” for more details.
 - Higher percentage rate on administrative renewals than for automated case renewals (ACRs).
 - Administrative renewals effort is one of the last on the list of requirements from the Affordable Care Act (ACA). Important to remember that the administrative renewals apply to health care only.
 - One goal of the federal policy on administrative renewals is to renew eligibility automatically whenever possible without contact with the member. This aligns with the policy at the Federally Facilitated Marketplace (FFM) in which a member can check a box on a form to indicate that he/she would like coverage to be continued automatically (unless the member is no longer eligible).
 - DHS expects a higher success rate on administrative renewals than for automated case processing (ACP) of initial applications.
 - Discussion on the federal requirement to send a Pre-printed Renewal Form (PPRF) for health care when the data exchanges (Equifax or State Wage Income Collection Agency or SWICA) are unavailable to verify income or when a completed administrative renewal would have resulted in pending benefits or terminating them.
 - Also discussed the potential for automating PPRF for FoodShare. Consortia were concerned about possibility for member confusion when members get an automatic PPRF for FoodShare if the renewal still requires an interview.
 - When asked how to identify PPRF’s, Autumn indicated that they would be included on the dashboard and could also be found in the document viewer. Consortia asked that the PPRF’s be identified by a specific code to help them differentiate between them and other documents. Autumn appreciated this feedback and will insure that this is incorporated. The document type code will be changed from “APP” to “PPRF,” allowing it to be shown on the dashboard as a renewal work item.
 - During the administrative renewal, benefits cannot be terminated at renewal based solely on information from a data exchange. Agencies must instead send the member a PPRF (not the Verification Checklist). In response to a question about use of Automated Voice Response (AVR) as a trusted data source, no plans at this point to incorporate it into the administrative renewal process because it is not available as a real-time data exchange.
 - Processing in CARES – a description is on page 6 of the handout. Because administrative renewals do not require worker intervention, they would not be shown

on the dashboard. A project to show the administrative renewals on the dashboard is planned to begin in September.

- An idea that emerged from the ‘different code’ identifier discussion: explore whether a specific code could also be used to identify the Six Month Report Forms (SMRF’s) and populate SMRF work items on the dashboard.
- One change from the current process: Elderly Blind Disabled (EBD) members are being evaluated for which types of Medicaid will qualify for administrative renewals.
- Consortia asked if they could have more input to the design of the correspondence that will be sent as part of the project. Clarification about when/if to update a case with new or discovered information regarding income: if, for instance, new information is discovered through a FoodShare interview, that information should be updated in the case file and applied to the health care benefits as a change.
- Workers will continue to be able to do a PPRF and/or case summary as needed.

4. Income Maintenance Management Report (IMMR) Upgrades: Program Add and Real-Time Eligibility (RTE) – Autumn Arnold (Handouts)

- See the following CARES IM Management Reports handouts for more detail:
 - Received Applications by Program Request and Source Landing Report
 - Health Care Received Applications by Program Request and Source Landing Report
 - Health Care Non-FFM Received Applications by Program Request and Source Landing Report
 - RTE (Real Time Eligibility) Application Summary Landing Report (a NEW report, not a revised version of a previous report)
- Consortia asked some clarifying questions as they went over each of the reports.
- Bureau of Enrollment Policy and Systems (BEPS) has been monitoring the application information reflected in the reports behind the scenes but these new reports will begin being published / made available as of 3/1/16.
- For the first three reports referenced above, the new versions will be available back to October 1, 2015. The previous versions will be available to agencies to view for application data through February 29, 2016.
- On another note, Autumn referenced the ACCESS-Mobile Survey and that she would collect any that people had brought with them. She reported that 5,500 responses to the survey had been collected.

5. Benefit Recovery Investigation Tracking System (BRITS) – Lexi Kolinier and Fay Simonini, DCF (Handout)

- See handout “BRITS Phase I – General Communication” for more details.
- BRITS overview: 20% growth per year in these categories; currently,
 - Number of investigation records (125,000);
 - Amount of receivables (\$100 million); and
 - Number of users (1,000).
- A Comprehensive Data Warehouse is a new feature that goes live in BRITS.

- Two Phases:
 - Phase 1 encompasses the redesign of the Fraud Investigative Tracking System (FITS), tracking of public assistance fraud referrals, fraud investigations and their results. Target date is October, 2016.
 - Phase 2 will address claims establishment and collection redesign. Just beginning requirements at this time; target date is to be determined.
 - The new ‘one investigation’ feature creates efficiencies and increases productivity by allowing multiple programs to use the results independently of one another.
 - The new ‘workload hub’ is a tailored to the user(s), not a gatekeeper functionality. Based on preferences and permissions, it can be used to prioritize and sort work.
 - One challenge being discussed is how to handle the back-logs of cases.
 - Should existing cases be transferred (converted) to the new tool? Should these cases be individually reviewed before making a decision? Analysis is continuing on how to transition work from the current state to the new tool.
 - These are a mix of fraud investigations referrals and over-payment referrals.
 - Overpayment cases will need to have the over-payments calculated.
 - Consortia asked if over-payments would be calculated in BRITS. This is under consideration and is being addressed by the various work groups that have been working on the project.
 - Lexi Koliner noted that Phase 1 of the project has been successful due to collaboration between DHS and DCF. Key DHS players were the CARES Call Center, Training and Policy areas. The internal work group will help with supporting the transition to the new tool.
 - CARES Worker Web (CWW) will have links to BRITS as well as a feature that will alert workers to an open referral.
 - BRITS will leverage CARES data.
 - Training is working on updates to the current workflows to reflect the new tool and processes.
 - Will continue to solicit questions, suggestions, feedback. Discussions held on best forum for collecting these items and providing to the work group.
 - Consortia expressed interest in being more involved and having input into the business requirements for Phase 2 of the project.
6. Electronic Residency Verification (ERV) – Jennifer Mueller, Chris Partridge and Jatinder Singh
- At the January IMAC Meeting, Becky David had asked for feedback on performance, consortia’s experience with ERV. Consortia said that:
 - SharePoint site was not functioning as well as hoped;
 - The SharePoint format did not support the ERV activities effectively;
 - The activity resulting from ERV outside of CARES Worker Web was an additional workload.
 - The following actions were taken to address the feedback:
 - Resolving SharePoint issues is the first priority. The issues identified were access to needed files in SharePoint and understanding SharePoint functionality. Goal is to operationalize actions, share best practices and identify those that applied to the

appropriate consortia based on their processes. Question posed to consortia: “What’s the best workflow for your agency?” Also used feedback to modify the spreadsheet and SharePoint as needed.

- A work group is being formed to gather information on consortia’s workflow process and business needs:
 - Process Support Subcommittee may be the forum or a new work group may handle. If the Process Support Subcommittee handles, consortia would like the opportunity to have appropriate representation participate.
 - DHS will evaluate efficiencies, cost savings, benefits of ERV. How much money, time was saved. How were benefit levels impacted?
- Initially, the ERV report volume was quite large (4,000 records statewide), but that volume is expected to level out at about 400 per month.
- Consortia comments on cases and reporting process:
 - Did not expect cases for homeless and childless adults to appear on the report.
 - The time needed to work the case seems to be about twice as much as had been expected.
 - If consortia find outlier cases; send them to the CARES Call Center.
 - Next report will be sent around the beginning of March.
 - First ‘batch’ should be turned in by 2/29/16.
 - Discussion on system / drop-down boxes and two options/statuses.
- EVR SharePoint site:
 - Menominee Tribe folder loading issue has been resolved.
 - Access to the SP site and staff identified for that access - some consortia staff were able to access the SP site but had to reconfirm that they were eligible to enter into folders, cases. Other feedback: DCF access to SharePoint is not an issue; need to investigate why DHS is having so many issues.
Action Item: **Jatinder Singh** is developing and will send a quick reference guide on how to navigate the ERV site.
Consortia should use link to the SP site which will create an email to the SP inbox to report problems.
 - Other SharePoint feedback: 1) Getting access to SharePoint continues to be an issue, and 2) consortia would like assistance in designing a consortium-specific SharePoint site.

7. FoodShare (FS) On Demand Update – Michelle Furr and Becky David (Handout)

- See handout “Operational Preparation Considerations for FoodShare On-Demand Implementation” for more details. The handout is designed to spur thought and topics for discussions at the upcoming FS on Demand roundtables.
- Roundtable schedule and invitations were sent. When responding, no need to specify if attending in-person or via AdobeConnect.
- A few issues arose with the email invitation. If unable to open, email Becky David to get the invitation.
- A search and tracking tool is being developed to track timeliness. It will be demonstrated at the 3/11/16 IMAC IT Subcommittee meeting. Consortia asked if ad hoc tools will still be available. Michelle Furr will check into this.

- Consortia asked about summary reports that could be used for planning before the launch.
8. Regional Enrollment Network (REN) Update – John Rathman
- Tax reconciliation (SEP) to 3/31/16 for 2014.
 - REN group is looking for sponsors for a fall conference.
9. Income Maintenance (IM) Funding & Contracting Updates – Debbie Waite & Jenny Hoffman
- Affordable Care Act (ACA) contract documents were mailed to contract signatories on 2/15/16.
 - Bureau of Operational Coordination (BOC) is producing a chart to show status of contract documents, funding carry-over documents, administrative memos. This will be produced on an ongoing basis.
 - Draft of the Administrative Memo on enhanced funding is circulating internally for review. Enhanced funding will be distributed via a check.
 - Consortia stressed importance of getting these numbers for staffing planning.
10. Consortia Feedback – Jenny Hoffman
- Every consortium can change the Elderly Blind Disabled (EBD) letters.
 - DHS is addressing the issue of Department of Workforce Development (DWD) charging for access to data for eligibility purposes; consortia should wait for further information before signing agreements or taking action.
 - Snapshot reports on overpayments are only showing FoodShare. Can these be expanded to show health care as well?
 - Consortia received very short notice on requests for feedback on ChildCare notices.
11. Operations Memos - Becky David
- In process:
 - a. the FoodShare Tool
 - b. FSET/ABAWD policy changes
12. Administrative Memos – Debbie Waite
- a. Lobby Services Draft – Judy Johnson
This was shared with the tri-chairs who provided feedback regarding changing the title to “Customer Services” and issuing as a new Administrative Memo.
Consortia felt two weeks for comments was sufficient.
 - b. See previous references above.

13. Sub-committee & Work Group Updates - Debbie Waite & Work Group Chairs (Handout)
 - See the handout “IMAC Subcommittee Update – February 18, 2016” for more detail. It shows a significant amount of activity in the previous month.

14. Miscellaneous Updates / Other / Public Comment
 - a. Gap Case Tracking Chart – is now a monthly report that will be distributed with IMAC Meeting materials.

15. March 17, 2016 Meeting - Tentative Agenda Topics
 - a. Control D Update
 - b. Administrative Renewals Update
 - c. BRITS Survey / Update
 - d. March CARES System Release