

# Adding Renewals to the Dashboard Project Overview

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# Agenda

- Background
- Goals and expected benefits
- Scope
- Timeline

# Background

- Feedback from income maintenance agencies:
  - Add renewals to the dashboard
  - Maintain current approach for “Days Left to Complete” section on dashboard
  - Remove renewal counts under “My Inbox Items” section
  - Remove Six-Month Report forms (SMRFs) and Employer Verification of Earnings (EVFE) forms from the “My Tasks” section

# Background, continued

- Create the ability to show team dashboards on the home page
- Maintain Case Management searches
- Remove unnecessary alerts
- Create additional work item flags
- Automate issuance of Pre-Printed Renewal Forms (PPRFs)
- Create a specific PPRF code in Electronic Case File (ECF)

# Background, continued

- Late September 2016 implementation
- Statewide implementation (no pilot)

# Goals and Expected Benefits

- Enhance worker dashboard to include and track renewals for timely processing
- Provide a holistic view of workloads that will lead to more effective management of work and determination of staffing resources

# Goals and Expected Benefits, continued

- Replicate system functionality from the application dashboard with minimal changes for the renewals dashboard
- Create new renewal reports within Income Maintenance Management Reporting

# Programs Tracked on the Dashboard

- The renewals dashboard will track the status and counts of each renewal.
- Within each renewal, the renewals dashboard will track the status and counts for each of the following work item types:
  - FoodShare
  - BadgerCare Plus
  - BadgerCare Plus Childless Adults

# Programs Tracked on the Dashboard, continued

- Elderly, Blind, and Disabled Medicaid
- Medicare Premium Assistance
- Institutional Medicaid
- Family Planning Only Services
- Caretaker Supplement
- Child Care
- Wisconsin Works

# Creation of a Renewal Work Item

- A renewal is submitted in ACCESS Review My Benefits.
- A PPRF is received, scanned, and indexed.\*
  - CARES will determine which work item types to create based on the programs currently due for renewal.
  - PPRFs will be marked as PPRFs and will have their own code in ECF.
- A worker selects to process a renewal from the Application/Review Interview Details page.

\*New functionality

# Renewal Due Date Logic

- The renewals dashboard will use the same “days to complete” logic as the applications dashboard.
- Due dates will be set based on the program and the date the renewal was submitted.
  - For example, a timely renewal for any program will have a due date of the last day of the renewal month.
  - For example, a late health care renewal due date will be set as 10 calendar days after receipt of the renewal.

# Other Features and Enhancements

- PPRFs will be automatically issued as an attachment to the 45-day renewal letter.
  - This is a federal requirement for health care cases when administrative renewals are implemented.
  - For consistency, the PPRF will be included for health care and FoodShare cases and FoodShare-only cases.
  - The 45-day renewal letter will be updated to reflect the PPRF attachment, with a prominent message that FoodShare cases must complete an interview.

# Other Features/Enhancements, continued

- The PPRF will be dynamic based on the programs due for renewal.
- Agencies will not need to take action on health or FoodShare renewals until the member calls or submits an online or paper renewal form.
- The “My Inbox Items” section will no longer display the following:
  - Apps with Priority Service
  - Apps Received Before

# Other Features/Enhancements, continued

- Apps Received After
- Total Number of Apps
- Online Renewals Received
- Online SMRFs Received
- SMRFs and EVFE forms will be removed from the “My Tasks” section.
- Agencies can choose whether or not to show a given team dashboard on team members’ home pages.

# Other Features/Enhancements, continued

- Case Management searches will be maintained.
- Most renewal-related alerts will be discontinued.
- Additional work item flags will be added.

# Implementation Timeline

Implementation is scheduled for late September 2016 and will include:

- Full renewals dashboard functionality
- Automation of PPRFs

# Upcoming Events of Interest

- August 26—IMAC IT walk-through of the renewals dashboard (with mocked-up screen shots)
- August 26—IMAC IT walk-through of renewal reports (with mocked-up screen shots)
- Mid-September—publication of operations memo
- Mid-September—training

# Questions