

# QUEST/Vault Card Processes and Procedures

---

Michelle Ebert, IS Project Manager—Bureau of  
Operational Coordination

Michele Dickinson, FoodShare Policy Section Chief—  
Bureau of Enrollment Policy and Systems

April 21, 2016

Income Maintenance Advisory Committee (IMAC) Meeting



# Background

## Workgroup meetings (January–March 2016)

- Division of Health Care Access and Accountability and IM agency representatives
- Goals
  - Improve program integrity
  - Provide a clear and consistent process
  - Reduce the number of emergency replacement cards issued
- Workgroup decisions to be included in Process Help Chapter 80 updates in early July 2016

# Permanent Cards—Store, Track, and Destroy Unclaimed

## Summary of decisions:

- Date stamp outside of envelope upon receipt
- Store in locked, secure area
- Destroy unclaimed cards within 30-60 days of receipt
- Two employees destroy unclaimed cards together

# Permanent Cards—Store, Track, and Destroy Unclaimed, continued

- New electronic Microsoft Excel tracking log for all cards received
  - Shows full accounting of cards in agency
  - Achieves separation of duties
  - Each agency submits log monthly or quarterly to the Department of Health Services

Note: No forwarding of QUEST cards to member in mail

# Vault Card Storage and Security

## Summary of decisions:

- Cards must be stored in a locked, secure area.
- There are minor changes to the existing vault card log process.
  - Must submit electronically to shared email box
  - Card issuer's full name included in log (not just initials)
  - Electronic log update to include Reason drop-down menu with options of "Initial," "Replacement," and "Card Error/Destroyed" (currently a free-form field)

# Emergency Replacement Vault Card Issuance

## Summary of decisions:

- No changes to guidance on expedited initial issuance
- Guidance for emergency replacement card issuance
  - Procedural steps to take before issuing
  - Policy on when it is **not** appropriate to issue
  - Factors to consider when deciding to issue

# Emergency Replacement Vault Card Issuance, continued

Procedural steps to take before issuing:

- Check CARES Worker Web mailing address and update if needed.
- Ask if member can wait for permanent card in mail.
- Check if a permanent card is awaiting pickup for homeless members.

# Emergency Replacement Vault Card Issuance, continued

Do not issue an emergency replacement card if:

- There are no benefits on the account, and none will be added in the next seven days.
- The member requested a permanent replacement card in the last seven days.
- Two vault cards have been issued on the case in the last 12 months.
- A vault card was issued on the case in the last 30 days.

# Emergency Replacement Vault Card Issuance, continued

Factors to consider when deciding to issue:

- What is the available balance on the account?
- When will a new deposit be added?
- Was there a recent large transaction?
- Are there upcoming postal holidays that may delay receipt of a permanent replacement card?
- Are any other emergency circumstances present?

The local office continues to define emergency situations on a case-by-case basis.

# Next Steps

- Administrator's Memo
- Process Help Chapter 80 released in early July