

IMAC Subcommittee Update July 21, 2016

Upcoming 2016 IMAC Subcommittee meetings have been scheduled as followed:

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| IT | July 22 |
| CCA | July 25 |
| Training | July 25 |
| IM Operational Analysis | August 5 |
| Process Support | August 8 |
| FSET | August 9 |
| Workload and Finance | August 23 |
| Fraud and Program Integrity | September 13 |
| Performance Monitoring | September 14 |
| Program Coordination | October 19 |

The following subcommittees and work groups have met since the May IMAC meeting:

Process Support

The Process Support subcommittee met on July 11. At that meeting, the group discussed the following:

- Burial trusts: OM 14-38. CARES will be updated so the worker will no longer have to use the workaround in the Ops Memo. CARES will exempt \$4500 instead of \$3000 in burial funds when the “IT – Irrevocable Trust” type is used on the burial asset screen. When workers come across the workaround at review or change, the case should be updated by entering one screen with the \$4500 total, instead of 2 screens of \$3000 and \$1500.
- AVS Discussion:
 - Frequent challenges workers are having when using the system
 - What changes workers would like to see?
 - Is there a need for reporting? If so what?
 - Hints and Tricks for AVS.

CCA

The CCA subcommittee met several times in June and July to discuss the status of the transition from CCA to Genesys. DHS and DOA continue to work on the schedule for the rollout of the Genesys application to all DHS partners, as well as an automated telephonic signature functionality. The schedule, specifics on the telephonic signature

functionality, as well as a communication plan for this project will be presented as they become available.

IM Operational Analysis

The IMOA subcommittee met on June 3. At that meeting, the group:

- Had a focused discussion on use of the CCA system to support IM agency operations and opportunities presented by the upcoming transition to Genesys. In that conversation, the group touched on the transition timetable, reviewed the phases of implementation, reviewed a wish list of call center technology enhancements and added additional items; and received information on very preliminary plans for staff training on the new system.
- Began a series of discussions on staff retention and recruitment by:
 - 1) Hearing from Laura Kleber (Waukesha County Health and Human Services) and John Elliot (DCF) about a research initiative and resulting strategies they have been working on with staff from the University. Some items of particular interest discussed were: creation of a recruitment video, use of surveys for staff leaving and for current staff, use of work from home and flex time; creating career paths for staff.

The IMOA subcommittee met on July 8. At that meeting, the group:

- Continued its exploration of recruiting, retention and training opportunities for IM staff. Specifically, the group:
 - 1) Hosted a Dean from Mid-State Technical College to share information on current course offerings and certifications relating to customer service in the context of human services programs and then explored with her opportunities to work collaboratively on educational and certification initiatives
 - 2) Shared examples and insight on creation of position descriptions; interview questions and strategies; strategies to recruit staff including using current staff as ambassadors, social media, internet and website options, use of centralized recruiting sites; and creating a recruiting video
 - 3) Shared examples and ideas on retention strategies including: work from home initiatives, use of flexible schedules, shared templates for staff exit surveys and current staff surveys
 - 4) Reviewed consortia work plan expectations on the topics of recruitment and retention
- Heard status reports for the following IM related work groups:
 - 1) BRITS – this work group has met several times. Launch date for Phase I is now November 7. Issue of being able to work multiple referrals concurrently is being

- addressed. Discussed BEPS expectation to address backlog of referrals prior to that date and asked for more conversation at IMAC.
- 2) SharePoint – this work group has met once. First meeting was to define scope of work which will include both consortia access/use for their individual purposes and also access/use for state assignments and information.
 - 3) ADRC – IM Collaboration – this work group has not launched yet and is awaiting partners in Division of Long Term Care to indicate readiness to proceed.

FSET

The FSET subcommittee met on June 14. At that meeting, the group discussed the following:

- In March of 2015 FNS told DHS that IM workers, not FSET workers, must make the determination of good cause if the individual subject to the ABAWD work requirement and participating in FSET to meet the work requirement, does not meet the required hours of participation due to circumstances beyond the individual's control.
- DHS had planned, in the short-term, to implement this policy change via a memo that would outline a process in which FSET and IM workers communicated about case specifics and the IM worker approved the use of good cause.
- It became clear this was not a workable solution. DHS has instead decided to develop a systematic fix. This will be implemented in late summer or early fall 2017.
- Until then, workers should continue to do what they are doing
- Reminders: FS Clock and Exemptions
- Reminders about batch runs – On the 2nd Saturday of the month clock changes run/update based on the information entered on the case.
- FSET agencies check after the 2nd Saturday before contacting the IM agencies.
- IM side – make sure worker is processing exemptions back to the first of the month in which they are reported.
- FSET side – make sure the worker documents that job retention service has been offered to individuals who have gained employment and fit job retention services category.
- Reviewed the FSET Regional Transfer timeline and process
 - Individuals can report moves to either agency. The agency that becomes aware of a move should report it to the other agency through established lines of communication.
 - If reported to IM first, the case is updated and then automatically sends the referral to currently assigned FSET worker. FSET worker will see that there is a move and can do what needs to be done.
 - If FSET agency becomes aware first, the FSET worker closes out the case and transfers to the new region. The IM referral will then show the new region. Notify the IM agency.

Workload & Finance

The workload and finance subcommittee met on June 28. At that meeting, the group:

- Discussed the process for distributing the 2014 FoodShare bonus dollars. FNS has indicated approval of DHS plan submission – a draft admin memo will be routed for consortia sign off, followed by a contract addendum. FoodShare bonus amounts will be added to base contract profiles to enable DHS to track compliance with defined expenditure categories.
- Confirmed that the CY 2014 enhanced funding checks were sent out – DHS is currently conducting final reconciliation of 2015 which will enable sharing of information on enhanced funding for that year.
- Shared highlights of first CY 2017 IM contract negotiating session – consortia reported that funding group had just met and a recommended methodology on distribution should be coming shortly. Consortia indicated information from 2015 close out, including local levy numbers, are crucial to their work on this topic.
- Heard DHS confirm that work has begun on documentation to submit to CMS for FFY 2017 enhanced MA funding opportunity.