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INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

Thursday, February 16, 2017

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 877-820-7831, access code 361278

MINUTES

Non-State Attendees:

Jenny Hoffman, Bay Lake / Brown Co.	Carol Wautlet, Bay Lake / Door Co.
Kris Parkansky, Bay Lake / Marinette Co.	Shawn Tessmann, Capital / Dane Co.
Melissa Duane, Capital / Columbia Co.	Michele Chiuchiolo, Capital / Dane Co.
Ron Redell, Capital / Dane Co.	Kara Ponti, Capital / Dane Co.
Tony Sis, Capital / Dane Co.	Roxana Vega, Capital / Dane Co.
Amy Beranek, Capital / Dodge Co.	Stephanie Ronnfeldt, Capital / Richland Co.
Julie Arendsee, Capital / Sauk Co.	Annett Mooney, East Central / Marquette Co.
Amy Roland, East Central / Outagamie Co.	Ann Kriegel, East Central / Winnebago Co.
Linda Struck, Great Rivers / Eau Claire Co.	Ronda Brown, Great Rivers / St. Croix Co.
Mandy Mayek, IM Central / Portage 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.
Robby Fuller, Southern / Crawford Co.	Katie Chambers, Southern / Iowa Co.
April Heim, Southern / Rock Co.	Lorie Graff, Western / LaCrosse Co.
Kimm Peters, WKRP / Kenosha Co.	Debbie Schwandt, WKRP / Kenosha Co.
Claribel Camacho, WKRP / Racine Co.	Mai Le-Yuen, CMS

State Attendees:

Abby Abernathy, DHS	Renee Aschenbrenner, DHS
LaTanya Baldwin, DHS	Becky David, DHS
Ed Dillon, DHS	Michelle Ebert, DHS
Tonya Evans, DHS	Matt Fanale, DHS
Rachel Geilenfeld, DHS	Justin Hall, DHS
Nicole Huffman, DHS	Judy Johnson, DHS
Paul Michael, DHS	Jennifer Mueller, DHS
Chris Partridge, DHS	Jessica Spencer, DHS
Angela Stanford, DHS	Julie Taylor, DHS

Debbie Waite, DHS	Mai Yee Xiong, DHS
Pang Xiong, DHS	

1. Administrative Issues – Debbie Waite & Jenny Hoffman
 - Report attendance on-site by signing the sign-in sheet and if attending remotely, by emailing Linda Alexander of your attendance.
 - DHS is hosting a fiscal manager training via statewide teleconference on Wednesday, March 8 from 1:00 -3:00 pm. Teleconference information has been shared with consortia Operational Leads and consortia/county fiscal manager distribution lists through an e-mail from Area Administration. The training will not be recorded but the slide set will be made available. A repeat session of this training will be scheduled in the fall.
 - Debbie thanked Judy Johnson for assisting with the minutes for this meeting in the absence of Linda Alexander

2. Approval of January 16, 2017 Meeting Minutes – Debbie Waite
 - Motion to approve the minutes was made, seconded and passed by voice vote.

3. April 2017 CARES Release Overview – Jennifer Mueller
 - a. *Telephonic Signature Changes – Paul Michael*
 - See “Telephonic Signature Changes” handout for more details.
 - April Operations Memo is scheduled to outline items that will not be changing and those that will be changing.
 - Big changes to note: In Genesys, the worker will have to select what telephonic signature prompt is needed related to the programs of assistance. This is a transition to the ‘automated prompt’ that will be provided in Spanish and Hmong and can be shared with the language line.

 - b. *Disaster Supplemental Nutrition Assistance Program (D-SNAP) Enhancements – Rachel Geilenfeld*
 - See “D-SNAP Enhancements” handout for more details.
 - Vision and goal of the project was to automate a report Food and Nutrition Service (FNS) requires during a D-SNAP
 - The report will be automated through CWW, so the workgroup also took the opportunity to streamline DSNAP application processing
 - A new DSNAP page will be included in the FoodShare (FS) driver flow and minor enhancements to the program request page, FS gatepost page, and FS summary page
 - These will all be disabled until a DSNAP takes place
 - They will only be enabled for certain zip codes at that time
 - DHS will distribute an Ops Memo in late March, and will also hold listening sessions with Income Maintenance (IM) agencies covering DSNAP topics on 3/7/17 and 3/21/17.

- c. *Paperless Correspondence Security Fix – Ed Dillon, Mai Yee Xiong*
- See “Paperless Correspondence Security Fix” handout for more details.
 - December, 2014 – Release of notice review on-line via ACCESS
 - CARES Worker Web (CWW) changes – New page called “Electronic Contact Information” and is required only for the primary person
 - This page can be built for other members of the household but will only appear for the primary person as designed.
 - Authorized representatives will not be in the drop down on this new page.
 - Only individuals that can create an ACCESS account are the primary person, the primary person’s spouse and individuals over 18.
 - Case summary PDF changes – masked emails
 - Out-of-home code ‘15’ – Cases are run on a nightly refresh and the person coded as out-of-the- home will not be able to access any information on the case after the refresh takes place.
 - ACCESS – Individual PIN based and will be able to view individual based notices, i.e. FSET, 3 TLB’s
 - Correspondence
 - One-time mailing to current enrolled FS Employment Training (FSET) members who are the primary person (PP) of an open case and request paperless
 - Individual level viewable in ACCESS
 - Paperless message on initial FSET enrollment letter
 - Paperless confirmation letters to be displayed with case number, not PIN
 - Timeline:
 - Ops Memo – 4/4/17 release
 - Technical Assistant Policy & Process (TAPP) Subcommittee meeting – 3/24/17
 - Between April and August, 2017, when a member logs into ACCESS, they will get a message that they are paperless. Until further notice, a banner will display on ACCESS promoting paperless availability.
- d. *Member Information Interface – Pungnou Her*
- See “Member Information Interface” handout for more details.
 - The goal of the Member Information Interface Project is to collect and share additional demographic information with health care partners, such as Health Maintenance Organizations (HMOs) to improve communications between HMOs and their enrolled members. HMOs are obligated to provide timely services and often struggle to get in contact with members in order to provide those services. Information that will be shared with HMOs includes: additional phone numbers, preferred methods of contact, best time of day for contact and email address.
 - In order to share email address with HMOs, members must grant permission to share their email address. A primary person who is 18 years or older can grant permission on behalf of themselves or any children or minors in the household. Other adults age 19 or older on the case can grant permission to share email

address on behalf of themselves only. In order to capture permission to share email address, changes will be made to ACCESS and CARES to ask the member if he or she would like to share his or her email address. IM workers will not be expected to be asking the question about permission to share their email address but should be aware of where and how the member can update his or her response in ACCESS and/or CARES.

- Timeline:
 - Ops Memo – 4/4/17
 - Email enhancements to ACCESS and CWW – 4/22/17
 - New Panel added to ForwardHealth interChange (iC) – 7/14/17
 - Supplemental report published for HMOs – 8/18/17
 - HMOs are not allowed to share any Personally Identifiable Information (PII) via email. DHS will be providing a script related to this concern. Detailed guidelines will be provided to the HMOs and will be upheld to those guidelines.
- e. *Priority Service FoodShare (PS FS) Timeliness on Dashboard – Becky David*
- See “PS FS Timeliness on Dashboard” handout for more details.
 - The project seeks to enhance the system so a worker no longer has to manually change member reported information on the ‘Priority Service Determination’ page.
 - ACCESS Changes
 - If the member does not report needed information, the member will be ineligible for priority service.
 - New messages have been added to encourage members to provide all answers.
 - ACCESS and CWW updated question on PS determination page – More gender neutral
 - ‘Application and Program Add’ summary – Answers will be left blank if a member does not answer the question.
 - ‘Priority Service Determination’ page will retain historical information (as of go-live date).
 - If income, assets, housing or utilities are left blank, the RFA/Case will be ineligible for Priority Service
 - New messages have been added to encourage worker entry of these fields
 - ‘Standard Utility Allowance’ field – Updated with dropdown menu
 - Expedited determined after interview – Work item will be able to be updated to reflect Priority Service.
 - Discussion related to date of discovery versus eligibility run date. The Ops Memo will clarify these details.
 - Timeline:
 - Ops Memo – 4/7/17
 - TAPP Meeting – 4/14/17
- f. *Transition Benefit Issuance Mainframe Screens to CWW – Justin Hall*
- See “Transition FS Benefit Issuance Mainframe Screens to CWW” handout for more details.

- Purpose – Long term solution to moving supplement issuance out of mainframe into CWW.
 - FS supplements will no longer be allowed to be requested or approved in mainframe.
 - When running with dates, workers will have the option to issue a FS supplement with the system calculating the amount.
 - A new page in CWW will allow workers to issue a manual supplement with up to 3 reasons.
 - Supervisors will have a real-time notification under their ‘My Tasks’.
 - All FS issuance screens will be moved to CWW.
 - One of the new pages will include a ‘To Be Issued’ section.
 - Mainframe screens will be accessible but read-only.
 - The FS supplemental notice will be enhanced to better describe supplements.
 - Timeline:
 - Ops Memo – 3/30/17
 - Demo at TAPP meetings – 4/7/17 and 4/14/17
 - Go live – 4/22/17
 - Training – IM New Worker Training (NWT) – 5/1/17
 - Recording demo – Mid April
 - Recording demo for supervisors – Mid April
 - Process Help – 7/24/17
 - CWW mock-up overview was provided – See handout; demo will be at TAPP meetings noted above.
- g. *CARES Technology Refresh – Program Participation System (PPS), FoodShare Information Access (FSIA), Wisconsin Incident Tracking System (WITS) – Chris Partridge*
- See “CARES Technology Refresh” handout for more details.
 - Phase 1 of 3 includes PPS, FSIA and WITS
 - Moves PPS, FSIA and WITS from mainframe servers to virtual servers
 - Improves security
 - Greater batch functionality
 - More efficient deployment of applications
 - Lower hardware costs
 - Software upgrades
 - Linux OS
 - Websphere
 - Rational Application Developer (RAD)
 - Timeline:
 - April release – Will be transparent to agencies
- h. *Administrative Renewals – Statewide Rollout – Nicole Huffman*
- See “Administrative Renewals” handout for more details.
 - The pilot with IM Central has begun, with 204 cases (10% of health care renewals due) successfully renewed through the first administrative renewal process in

February, 2017. More information regarding results will be shared at future IMAC meetings.

- Administrative renewals will be implemented statewide in May, 2017.
- Also beginning in May, 2017, Group A Community Waivers cases that are eligible based on Supplemental Security Income (SSI) will be eligible for the administrative renewal process. Individuals eligible for Group A Community Waivers and/or Medicare Premium Assistance (QMB) due to their eligibility for SSI will be sent a separate administrative renewal letter without a case summary, unless the case is open for another health care program.
- Timeline:
 - Ops Memo – 1/5/17
 - Amendment published - 2/10/17
 - Amendment to be published – 4/7/17
 - EBD/LTC Process Support – 4/10/17
 - BadgerCare Plus & Medicaid Eligibility Handbooks updated – May, 2017
- Discussion / Q&A:
 - Will agencies be held harmless for QC errors on administratively renewed cases? This will be addressed in a future discussion.

i. *System Fixes/Miscellaneous Enhancements – Jen Mueller*

- Handout will be shared to those in attendance by phone tomorrow by Jennifer Mueller

4. Quality Control (QC) Section Findings Quarterly Update – Jessica Spencer

- See “Second Party Review 2016 Review Results” handout for more details.
- 5,745 reviews were completed in 2016
- 6,245 errors identified – 21% were technical errors only
More detail was then provided on each error category. Details will be shared with Performance Monitoring Subcommittee at its next meeting.
- IM Quality Assurance (IMQA) enhancements are scheduled tentatively for November, 2017. Demonstration will occur at a future Performance Monitoring Meeting once the new tool is developed.
 - An internal workgroup was formed in August, 2016 to enhance the IMQA tool. The initial vision was to enhance the current tool to reflect policy updates and allow for review of negative samples.
 - After the workgroup met, it was determined that a complete overhaul of the IMQA tool was needed.
 - The new vision is to incorporate the IMQA tool into CWW to allow for reviews of current data, as well as historical data. The new IMQA will be a driver flow within CARES.
 - The new IMQA driver will have the ability to review negative samples (cases that have been denied or terminated), as well as complete targeted review based on certain criteria.
 - IM Management Reports (IMMRs) are also being re-designed to create more precise error tracking and to better determine error trends.

5. CARES Call Center (CCC) Update – Becky David
 - DHS is aligning its bureau wide Long Term Care (LTC) expertise to provide consistency and enhanced support for IM workers
 - Continue to watch for CARES Coordinator notices.
 - Information coming related to Self-Employment – New forms, Process Help, etc. to be shared accordingly.
 - CWW system errors – No fixes have been put in as of this date but continue to be worked.

6. Electronic Benefits Transfer (EBT) Card Tracking Process Reminder – Judy Johnson
 - A reminder was provided to agencies to submit the log in a timely manner. Consortia notes that there may be confusion related to what ‘quarterly’ means. Judy Johnson explained policy rolled out in July, 2016 so DHS intended for quarterly to mean calendar quarter; however, DHS will bring it back to internally discuss.
 - The most common concerns related to the logs have been:
 - Failure to have two staff sign off on destruction
 - Destruction of the cards within 30-60 days
 - Incomplete data on the spreadsheet

7. Regional Enrollment Network (REN) Update – John Rathman
 - No discussion.

8. Income Maintenance (IM) Funding & Contract Updates - Debbie Waite
 - All 2017 base and ACA contracts had been signed and returned. DHS is waiting for four “de-ob” contract documents which will allow carryover of unused 2015 ACA funding into 2016. Operational Leads from East Central, Great Rivers, Moraine Lakes and Southern were asked to follow up on status of their documents.

9. Consortia Feedback – Jenny Hoffman
 - On behalf of consortia Operational Leads, Jenny Hoffman thanked Jen Mueller for the opportunity for them to share feedback on CARES system related issues and challenges, and to hear about DHS activity and plans to expeditiously address those issues.

10. Administrative Memos – Debbie Waite
 - Administrative Memos to implement 2017 base contracts and Affordable Care Act (ACA) funding are circulating for internal review at DHS and will be shared with consortia shortly. These complete DHS’ funding documentation even though actual base and ACA contracts have already been signed and returned.

11. Subcommittee & Work Group Updates - Debbie Waite (Handout)

- Review “IMAC Subcommittee Update – February 16, 2017” handout for details.

12. Miscellaneous Updates / Other / Public Comment

- See “Gap fill Eligible Cases” handout for current information. This reflects one month of activity for 2017 but does allow comparison with prior year activity.

13. March 16, 2017 Meeting - Tentative and Future Meeting Agenda Topics

- State and Federal Policy Update
- New IMMR Home and Search Page
- Electronic Residency Verification Results
- Authorized Representative, Power of Attorney (POA) and Related Tools Overview
- Training Subcommittee Update
- Administrative Renewals
- Gap Case Experience and Analysis
- Civil Rights Plan Preparation