

INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

Thursday, September 20, 2018

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:

Chelsey Groessl, Bay Lake / Brown Co.	Kris Parkansky, Bay Lake / Marinette Co.
Shawn Tessmann, Capital / Dane Co.	Cindi Flynn, Capital / Adams Co.
Kara Ponti, Capital / Dane Co.	Ron Redell, Capital / Dane Co.
Amy Beranek, Capital / Dodge Co.	Stephanie Ronnfeldt, Capital / Richland Co.
John Rathman, East Central / Outagamie Co.	Annett Mooney, East Central / Outagamie Co.
Kate Surprise, East Central / Waushara Co.	Ann Kriegel, East Central / Winnebago Co.
Linda Struck, Great Rivers / Eau Claire Co.	Nicole Rolain, IM Central / Marathon Co.
Amy Mayo, IM Central / Portage Co.	Rachel Pantaleo, Moraine Lakes / Ozaukee Co.
Sandy Potter, Moraine Lakes / Washington Co.	Debra Berg, Moraine Lakes / Waukesha Co.
Doreen Lang, Northern / Wood Co.	Kate Chambers, Southern / Iowa Co.
Jill Johnson, Southern / Jefferson Co.	April Heim, Southern / Rock Co.
Lorie Graff, Western / LaCrosse Co.	Kimm Peters, WKRP / Kenosha Co.
Nina Taylor, WKRP / Kenosha Co.	

State and Federal Attendees:

Abby Abernathy, DHS	LaTanya Baldwin, DHS
Andy Best, DHS	Dale Crapp, DHS
Becky David, DHS	Elizabeth Dehling, DHS
Tonya Evans, DHS, MILES	Judy Johnson, DHS
Amanda King, DHS	Angela Stanford, DHS
Melissa Todd, DHS	Debbie Waite, DHS
Nicole Price, DCF	

1. Administrative Issues – Debbie Waite & John Rathman
 - o Report attendance on-site by signing the sign-in sheet and, if attending remotely, by e-mailing Andy Best of your attendance. E-mail is Andrew.Best@dhs.wisconsin.gov
 - o DHS is continuing to explore ways to better improve the fair hearings process and insure consistency of outcomes with policy. At IMOA on November 2, consortia will be asked to share issues, opportunities and suggestions for improvement, and to bring actual examples. A pre-assignment will be sent with the meeting agenda.
2. Approval of September 20, 2018 Meeting Minutes – Debbie Waite

- Motion to approve the minutes was made, seconded and passed by voice vote.
- Consortia asked if DHS had done any analysis of need for clarifications in ops memos, process help, handbooks or other eligibility documentation that may have resulted from the September overview by DCF of the birth recovery cost rule changes. (Update post meeting: DHS policy staff has confirmed that a clarification will be included in the next handbook update)

3. IM Subcommittee Reports

- The IMOA subcommittee met on October 5. Doreen Lang shared key discussion points and action items from that meeting. (See attachment)
 - Consortia were encouraged to send summary information on use of the Work Number to Lisa Hanson if they had not already done so.
 - DHS confirmed that consortia may continue use of the Language Line through separate contracts with the vendor.
 - Consortia were reminded to watch for DACUM survey collecting information to support creation of an associate degree. Deadline for response has been extended to November 16.
- The Program Coordination subcommittee met on October 17. Lorie Graff shared key discussion points and action items from that meeting. (See attachment)
- The EBD/LTC subcommittee met on October 9. Ron Redell shared key discussion points and action items from that meeting. Subcommittee would like to see more line staff representation at the meetings.

4. October CARES Release – Becky David

5. CARES Call Center Update – Becky David

6. Regional Enrollment Network Update – John Rathman

- REN Conference held on October 2 and 3 was a success with about 160 registrants. Preliminary information was shared on plan choices for 2019, which will increase in some parts of the state. Also preliminary estimates indicate premiums will be moderating or dropping for some plans. Official announcement on premiums for 2019 plan year will be made by end of October.
- Conference break-out sessions contained helpful tips on supporting special populations with translation needs or releasing from incarceration.
- Monthly conference calls are continuing with the REN work group.

7. Income Maintenance (IM) Funding & Contract Updates - Debbie Waite/John Rathman

- Debbie Waite indicated that the Bureau of Operational Coordination had just sent out to consortia contract signatories the signed addendums for estate recovery funding for Q4 2017 and Q1 2018. Funding should be loaded in CARS by mid-November.
- DHS is awaiting feedback from WCHSA negotiating committee on proposed wording relating to indemnification of DHS. John Rathman indicated that

WCHSA legal counsel would be in touch with DHS to set up a phone call with respective legal counsel to discuss.

8. 2019 ACA Open Enrollment – Donna Friedsam

- See “Affordable Care Act & Medicaid Reform in Wisconsin” power point for more detail.
- Donna Friedsam, Health Policy Program Director for the UW Population Health Institute, presented an extensive overview of statistics on covered populations, uninsured populations, and projections for ACA carrier availability (choice) and ACA premium rates for Wisconsin’s 2019 open enrollment.
- Some key highlights include:
 - Carriers are projected to go from 11 to 14 with some returning to marketplace after leaving in previous years.
 - A target audience for addressing uninsured is children.
 - Premiums are decreasing across the country with Wisconsin decreases more dramatic. Implementation of reinsurance initiative under federal waiver is one reason.
 - With navigator funding decreasing, less in person assistance will be available but entities are working together – Covering Wisconsin is partnering with Northwest Wisconsin Concentrated Employment Program to provide at least telephonic assistance.
 - Consortia asked for feedback to be shared on how new DHS mailbox function is working.

9. Consortia Feedback – John Rathman

- Consortia asked about status of DHS decision on consortia recommendation on distribution of RMS funding. DHS will set up a call with tri-chairs in near future to discuss.
- Consortia indicated intent to move forward with a group/shared e-mail for each consortium to escalate issues with cases between consortia. Next step is to explore whether process help or another domain could be used to house the contact information, so its availability is limited to the consortia.
- Consortia reported continuing delays in getting access to security clearances for new staff. Requests should be marked “Urgent.” DHS staff will follow up.
- Consortia asked for script, talking points or another resource that call center staff can use if questions come in on proposed immigration rule to screen for self-sufficiency.
- Consortia shared positive feedback on the demos piloted for the October CARES release. More time between demo and Q & A would be preferable. Ask was for actual Ops Memo #'s to be incorporated into demo to support cross referencing.
- Consortia emphasized importance of including county IT staff in changes coming to ECF software. Agreed that GIPAW is right vehicle to disseminate information but noted that annual conference is not until March 2019 – therefore, another communication mechanism should be explored.

10. Administrative Memos – Debbie Waite

- 2019 FPIP Admin Memo is on AO's desk for final signature and should be posted shortly.

11. Miscellaneous Updates / Other / Public Comment

- GAP Case Numbers - Debbie Waite referred group to handout showing GAP numbers year-to- date and encouraged any consortia that have questions about the numbers to reach out to Pang Xiong at BEPS – EM CAPO.
 - Consortia were reminded to use the GAP mailbox for communicating with EM CAPO about GAP cases – not the EM CAPO mailbox.
 - 550-600 end-of-coverage-year letters will be going out to GAP members between Nov 16 and 19, indicating that their coverage will be ending December 31 and advising them to re-apply in 2019. Consortia may get questions as these letters are received.
- A reminder was given that the December 2018 IMAC meeting has been cancelled.
- No other public comment was shared

12. November 15, 2018 and Future Meetings - Tentative Agenda Topics

- Federal Policy Updates
- 2018 Management Evaluation Review Wrap-up and 2019 MER Plan and Process

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*If you want to participate by web meeting, you can follow along at your computer by logging into <https://connect.wisconsin.gov/imac/> as a guest 5 minutes ahead of time and calling the above conference line for the audio.

Income Maintenance Subcommittee Key Messages

IMOA

Friday, October 5, 2018

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Work Number	<p>COMMUNICATION</p> <p>DHS has been having communication with Equifax; discussed conversations with CMS & FNS to explore using a broader area of exchanges/data hub</p> <p>Consortia shared information on use of Work Number, protocols and improvements.</p>	DHS and All Income Maintenance Agencies	<p>DHS will review uses, and/or changes to Work Number along with other services.</p> <p>BOC and BEPS will continue to move conversation forward to promote efficiencies and accuracies.</p> <p>Consortia will send written information to Lisa, which will include other vendor services that they use.</p>	No deadline – future – next week or so
LEP Contract	<p>COMMUNICATION:</p> <p>DHS provided an overview on LEP contracted services.</p>	All Income Maintenance Agencies	Consortia to send information to Lisa.	

	<p>Due to the new contract, DHS will need to contract with vendors in Enterprise. IM Agencies can use negotiated vendor contract but do not need to.</p> <p>Reviewed vendors who are available as of Nov 1st</p> <p>Language Line is not an approved vendor under the new DOA contract and no longer available through DHS</p> <p>IM Agencies will be impacted only if they piggyback with state contract.</p> <p>Consortia reported on LEP services.</p>		<p>Other agencies besides IM may be impacted. DHS will take information back and reach out to other departments.</p> <p>Operational Leads should share information with other partners and departments.</p>	
<p>CARES Release Demo Update</p>	<p>Communication: Jen Mueller provided Project overview. DHS will continue with system demo for two pilots.</p> <p>Ops memos will also be released for the system changes.</p> <p>Scheduled pre-release Q&A for Friday, 10/19 9-10.</p> <p>DHS will need questions by 1:00 on 10/18. If no questions are received, the Q&A will be cancelled.</p> <p>Surveys will be available for folks taking the demos. Jen will collect feedback and report at IMOA in December.</p>	<p>All Income Maintenance Agencies</p>	<p>DHS</p> <ul style="list-style-type: none"> - send out demos on Wednesday, 10/17 - Provide Q&A on 10/19 - Collect feedback and provide information at December's IMOA <p>IM Agencies</p> <ul style="list-style-type: none"> - Attend demos and 	

	Demos and/or Q&A are not meant to replace training.		<p>submit questions by 1:00 on 10/18.</p> <ul style="list-style-type: none"> - Attend Q&A on 10/19 - Respond to surveys and provide feedback 	
Moving to Horizon	<p>COMMUNICATION</p> <p>Hoping to mitigate the Java issues and provide a stepping stone to Genesys, DHS began piloting Horizon.</p> <p>Project put on pause due to issues identified during pilot. DHS will conduct further research and determine if problems can be resolved or if move directly to Genesys.</p> <p>Counties who have piloted can continue to use Horizon or go to CCA.</p>	All Income Maintenance Agencies	<p>DHS</p> <ul style="list-style-type: none"> - Paul Michaels will send a clarifying email that IDs for Horizon are not needed at this time. - Jen or Paul will provide updated information when available. 	
ACCESS Mobile	<p>COMMUNICATION & ACTION – looking for partnership from consortia to roll-out ACCESS mobile. Plan to soft launch Nov 12th. DHS publishing marketing material on Jan 1st so can review environment slowly. This will allow DHS and IM to identify and respond to IM</p>	All Income Maintenance Agencies	<p>DHS</p> <ul style="list-style-type: none"> - Oct 31st Ops memo release - Will provide information at Nov 2nd IMO 	

	<p>impact.</p> <p>Suggesting for consortia to NOT market until January.</p> <p>Ops memo and partner email will be released end of Oct.</p> <p>Q&A session on Nov 9th. In preparation for lunch – DHS will develop scripts for staff.</p> <p>Member Services continues to be the help desk for ACCESS but anticipates IM will receive questions.</p> <p>Early February – looking at developing handouts including business cards, posters, updates to handbooks, webpages, twitter and facebook.</p>		<ul style="list-style-type: none"> - Nov 9th – Q&A date - Nov 12th release date <p>IM Agencies</p> <ul style="list-style-type: none"> – bring concerns, including impact or implications for doing doc processing at future IMOA & IMAC meetings. 	
<p>DACUM</p>	<p>ACTION:</p> <p>Abby reviewed the DACUM process along with the two surveys. One for all members who attended the DACUM meeting to ensure that they captured accurate information.</p> <p>Second survey will be sent to ESPAC, who will distribute to county staff and Directors.</p> <p>Mid-state staff attended to review</p>	<p>All Income Maintenance Agencies</p>	<p>Mid-State</p> <ul style="list-style-type: none"> - will get labor market analysis to determine what program can be provided/if any. - How to gauge embedded program 	

	<p>survey and DACUM meeting</p> <p>Projection If all gets approved by both College Board and State may be able to start next fall. Worse case scenario – winter 2020 semester.</p> <p>Follow-up discussion in December.</p>		<ul style="list-style-type: none"> - May need to build a multi-program model - will send survey to Abby by 10/10 <p>Abby will send survey to Doreen who will share with Operational Managers at ESPAC. Surveys need to be completed by Oct 31st.</p>	
	<p>ACTION:</p>	<p>All Income Maintenance Agencies</p>	<p>Next meeting Nov 2 in Madison.</p>	

**Income Maintenance Subcommittee Key Messages
Program Coordination
Wednesday, October 17th, Dane County Job Center**

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Follow-Up from July Meeting	Action: Debbie will follow up with Capital Consortium on any documented process they may have around communication between the IM agency and Child Support.	All IM agencies	Debbie Waite	
CCDBG Phase 3 Update	Action: As follow up to Liz's presentation on Phase 3 of CCDBG, she was asked to send Debbie the desk aid that DCF developed around Person Adds and overrides (If a new person does not verify financial information the AG will need to be failed manually in the mainframe).	DHS, IM and CC agencies	Liz Riley	
CCDBG Phase 3	Action: DCF will share talking points and/or other information that the Department is using to explain the reasons/basis for changes being made under the CCDBG Phase 3. The idea behind this is to help staff in local agencies to better understand and explain the changes.	All CC agencies	Rose Prochazka	
Energy Assistance Update	Communication: Counties that subcontract with a vendor to provide Energy Assistance services will be required to follow regular procurement processes beginning 10/1/19(6 or so agencies are exempt due to size). DOA	Counties		

	has already added requirements for counties to include performance benchmarks into their WHEAP subcontracts.			
Fraud & Program Integrity- Opportunities for Collaboration Across Departments	<p>Action: Program Integrity Representatives from DHS and DCF (Wendy, Emily & Tanya) will meet to review what information each Department seeks to receive from agencies/consortia in the annual Fraud Plan, to determine whether there's enough similarities to make it worthwhile to develop a single DHS/DCF annual Fraud Plan for 2020.</p> <p>Takeaway: DHS has simplified what they require under the annual Fraud Plan to the point where it may not make sense to combine with DCF, which requires a lot of unique information from agencies under their annual Fraud Plan.</p>	All IM and CC agencies		
Fraud & Program Integrity – Opportunities for Collaboration Across Departments	<p>Communication: DCF is willing to meet to explore whether agencies who handle Fraud for multiple counties, but not all counties in their consortium, might be able to submit 1 annual Fraud Plan for all counties they serve. Currently, DCF only allows 1 Fraud Plan to cover multiple counties if an agency handles Fraud for all counties in their consortium. The example shared at</p>	Counties that handle CC Fraud for multiple counties, and the counties they serve.		

	the meeting was Dane County, who handles Fraud for 4 of the counties in their consortium.			
Cross Departmental Major Project Timeline	Action: DHS will work to populate the timeline with the Department's information.	All Departments and local partner agencies	Multiple staff from DHS	
Next Mtg- January 16, 2019:	<ol style="list-style-type: none"> 1. Changes to Federal & State tax forms for 2018(simplified to a quarter of a page, with things moved to schedules) 2. Cross Department Civil Rights Compliance Project 			

State of Wisconsin
Department of Health Services

INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

EBD LTC Subcommittee

Tuesday, October 9, 2018

9:30 – 3:30 p.m.

Dane County Job Center, 1801 Aberg Ave – Ballroom, Madison, WI 53704

MINUTES

1. Housekeeping/Introductions/Minute Taker
 - Report attendance on-site by signing the sign-in sheet

2. Wisconsin Disability Determination Bureau – Sarah Sprecher, Betsy Demets, and Heather Pearson – DDB
See “Aging and Disability Resource Center Benefit Specialist Training” handout.
 - The DDB emphasized the importance of obtaining correct contact information – a usable phone number and address is crucial in making a timely disability determination. An exam will need to be completed and the client will be contacted by phone/mail with information regarding the exam.

Consortia Question: What happens to a DDB claim for an individual that passes away during the disability determination process?
Answer: Depends on type of case it was and the time frames involved. Title II benefits are NOT payable if death occurs in the 5 month waiting period. Title XVI disability determinations are still made even after an individual dies.

Consortia Question: Is the referring agency notified when a DDB application is medically deferred? Answer: No, the referring agency is not notified when a DDB application has been medically deferred. The claimant is notified by mail when a claim is medically deferred and additional evaluation time is necessary. Medical deferment – extent of an impairment will not be known until several months after its onset.

Consortia Question: Can the DDB provide more information regarding what documents are missing? Answer: A MADA and ADDD needs to be in ECF in order for the DDB to assist. Workers can contact the DDB and request to speak with the examiner. If the document is viewable in ECF by the county worker, but not by the DDB, then CARES Call Center would need to be contacted

Consortia Question: Will the redetermination process be moved into CARES for electronic submission of redeterminations? Answer: No. Only three people at the Disability Determination Bureau have access to CARES and ECF.

Consortia Question: When clients switch from SSDI to SSRE, do they lose their disability status? Answer: The client is considered disabled until their diary date. If there is no diary date, then contact the Social Security Office to try to obtain the diary date. If there is no diary date, then a DDB redetermination needs to be completed.

- Michelle Furr discussed diary dates and disability status. If the diary date has passed, and the client is still receiving SSDI, then the client would still be considered disabled. Lack of diary date on the disability screen does not mean that they are no longer disabled. Social Security is no longer concerned with their disability status once an individual switches from SSDI to SSRE.
- Consortia requested that Disability Determination and Transmittal Form (DDDOC) be coded differently so that they are more easily accessible in ECF.

3. LTC Related Handbook Changes Follow Up/Discussion – Michelle Furr

- See “Top 10 Wish List” from each consortia handout
- Updated Medicaid Handbook Release is set for December.
- Operations Memo 18-16 – Policy Changes and CARES Enhancements to Allow Organization to Act as Authorized Representatives
 - If a client has a legal guardian of the person only, then the client can appoint their own authorized representative and/or sign their own applications/renewals.
 - Legal guardian of the person does not have access to an individual’s finances, therefore is not authorized to sign on behalf of the client unless the client has completed an authorized representative form.
 - Clarification is being requested on if it is acceptable for LG of the person to sign on behalf of the client when court documents indicate that LG of the person can act on behalf of the client for MA purposes.
- Policy Reminders
 - Clients receiving SSI do not need to reverify assets.
 - Filing date is preserved when a disability denial is reversed.
 - Burial Trusts Reminder: \$4500 of an irrevocable burial trust is not countable, even though the state statute is set at \$3000.
 - MAPP in kind income – the value of the in kind income is based on the number of hours worked and not the value of the non-cash payment received.
- Michelle is seeking clarification on MAPP Roommate/Spouse Employment Agreements
- Addition of LTC Spousal Impoverishment Chart from EBD LTC Training into Process Help
- The State is working on making handbooks strictly policy and pulling all “process” related information out of handbooks and putting them into Process Help.

- Consortia Requests for Clarification of Policy/Additions to MEH
 - Burial Assets – send top two questions to co-chairs who will forward them to Michelle
 - Combining Annuity policies in MEH 17.11 and 16.7.4 into one section in the handbook
 - Income Diversion/Deviation is discussed in Ops Memo 08-02 but that Ops Memo is no longer viewable and Handbook does not discuss Income Deviations

- 4. WISPACT Presentation and Discussion/Questions – Eric DeGroot
See “WISPACT Special Needs Trust” PowerPoint handout.
 - The client can request an account summary/contributions and distributions report from WISPACT Trust
 - Differences in the amount written to WISPACT Trust and the amount deposited into WISPACT Trust could be due to attorney fees and other fees associated with set up of WISPACT Trust
 - WISPACT Trust Documents take 3-4 weeks to be completed

- 5. LTC Initiative Discussion – Michelle Furr
 - Updates for 2020 are still being reviewed
 - Population of diary dates on the Disability Screen from Disability Determination Bureau has been approved.
 - More information will be provided when it is available