

Tony Evers
Governor



DIVISION OF MEDICAID SERVICES

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INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

Thursday, August 22, 2019

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.
Cindi Flynn, Capital / Adams Co.	Carol Sjoblom, Capital / Columbia Co.
Maragaret Romens, Capital / Dane Co.	Tony Sis, Capital / Dane Co.
Roxanna Vega, Capital / Dane Co.	Amy Beranek, Capital / Dodge Co.
Stephanie Ronnfeldt, Capital / Richland Co.	Cheri Brickl, Capital / Sauk Co.
Diana Wood, Capital / Juneau Co.	Nikia Morton, Capital / Dane Co.
John Rathman, East Central / Outagamie Co.	Mitch Birkey, East Central / Calumet Co.
Kate Surprise, East Central / Outagamie Co.	Ann Kriegel, East Central / Winnebago Co.
Kathy Welke, Great Rivers / Eau Claire Co.	Ronda Brown, Great Rivers / St. Croix Co.
Nicole Rolain, IM Central / Marathon Co.	Kris Weden, IM Central / Marathon Co.
Molly Aird, Moraine Lakes / Fond Du Lac Co.	Mia Anderson-Inman, Moraine Lakes / Walworth Co.
Doreen Lang, Northern / Wood Co.	Mendy Chesebro, Southern / Crawford Co.
Kate Chambers, Southern / Iowa Co.	Jill Johnson, Southern / Jefferson Co.
April Heim, Southern / Rock Co.	Kimm Peters, WKRP / Kenosha Co.

State and Federal Attendees:

Abby Abernathy, DHS	LaTanya Baldwin, DHS
Amy Bell Ferries, DHS	Andy Best, DHS
Dale Crapp, DHS	Becky David, DHS
Tonya Evans, DHS, Miles	Sierra Gammond, DHS
Craig Hayes, DHS	Judy Johnson, DHS
Diane Koehnke, DHS	Debbie Waite, DHS
Rachel Witthoft, DHS	Marsha Vine, CDPU

AGENDA

1. Administrative Issues – Debbie Waite & John Rathman
 - 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.

2. Approval of July 18, 2019 Meeting Minutes – Debbie Waite
 - Motion to approve the minutes was made, seconded and passed by voice vote.

3. CDPU Update – Marsha Vine
 - Marsha Vine joined the CDPU in early summer replacing Mia Inman-Anderson as the director. Marsha comes to the position with 9 years of experience at HP/DXC mainly in overseeing the Forward Health Call Center along with other duties.
 - The following updates were provided:
 - A transition from KC9 to KTA is underway which is going fairly smoothly due to good project planning and preparation with BEPS staff. CDPU staff also worked to update and clarify documentation with transition to KTC.
 - FAX lines have presented some issues in recent weeks – going up and down. A cutover plan which had been in the works for August 20 was implemented early on August 12. This seems to have resolved the issues that were occurring. Consortia should report if issues continue.
 - A goal is to work with CDPU team on strategic planning for the future to create efficiencies by addressing bubbles in volume. Able to predict and strategically align CDPU team with workload.
 - Questions:
 1. Consortia noticing duplicate RFA's – what is cause? Staff may have been sending duplicates when machines down or machines were double sending.
 2. Is KTA conversion completed? – Pretty much completed, only about 5% still coming in on KC9.
 3. What should agencies do if they find miscoded documents? Send informational e-mail to Marsha.
 4. How should agencies get new staff access to scanning feature? Work with CARES Security to get in place – use “other” field on form to request. Action Item: Could this field be added to form?
 5. Is CDPU experiencing high turnover in staff? – No

4. October CARES Release Projects
 - ACCESS Document Upload Enhancements – Rachel Witthoft
 - See” Enhancements to ACCESS Document Upload” power point for more detail
 - Purpose is to align ACCESS capabilities with those in MyACCESS and enhance the user experience.
 - ACCESS handbook will be updated in October, no operations memo
 - FSET Worker Tools – Rachel Witthoft
 - See “FSET Worker Tools” power point for more detail
 - Project impacts FSET agencies
 - Allows FSET workers to directly refer FoodShare members to FSET which should help with work load management for FSET and IM agencies

- Shelter & Utility Expenses – Craig Hayes
 - See “Shelter and Utility Expenses” power point for more detail.
 - Purpose is to reduce error rates; also implement cooling expense and homeless shelter deduction.
 - There are no changes to shelter/utility verification policy
 - FS overpayment calculation worksheet needs to be updated for homeless shelter expenses
 - Consortia Request: Create a Q&A to clarify policy
 - Question: If member makes address change in ACCESS, what page will come up for member? Should member be asked to clarify other information as a result?
 - Question: Will there be a systems demo? Yes – and part of CARES Bulletin.
5. CARES Call Center Update – Becky David
- See “Operations Memos” handout for upcoming memos
 - Other miscellaneous information
 - Call Center is monitoring CDPU fax line changes closely – consortia should report issues.
 - Consortia question: What is causing blurry faxed or partial ACCESS mobile documents? Fax documents should be resolved by August 12 cutover. My ACCESS updates will be occurring in October.
 - CARES release will be October 19. For 2020, dates are February 1 and May 30.
6. MyACCESS Update – Becky David
- CARES Coordinator notice on August 9 announced move to biometric log-in option for members. Is working well.
 - About 10% of documents now coming in through MyACCESS
 - Question: Can documents be loaded to a closed case? Yes – for up to 3 months after closure. After that, new application is needed.
7. Subcommittee Updates
- The Training subcommittee met on July 22nd. Margaret Romens shared key discussion points and action items from that meeting (see attachment).
 - Received an update on innovative training project and information gathering being conducted by Deloitte from around the state.
 - Subcommittee is sharing trainings each has created.
 - The Call Center subcommittee met on August 12th. Kris Weden shared key discussion points and action items from that meeting (see attachment).
 - Paul Michael clarified that changes can continue to be made to call queues.
 - Subcommittee will be discussing options to enhance customer satisfaction survey presented on CCA calls. Operational leads should track this and provide input their representatives can share. Action Item: Customer

survey design recommendations should be brought to IMOA for review and discussion.

- An e-mail update on status of CCA replacement will be sent to operational leads and subcommittee members the week of August 26.
- The IMOA subcommittee met on August 2nd. Doreen Lang shared key discussion points and action items from that meeting (see attachment).
- The Performance Monitoring subcommittee met on August 21st. Ann Kriegel shared key discussion points and action items from that meeting (see attachment).
- Subcommittee Retreat – Debbie Waite noted that the annual subcommittee retreat to plan the 2020 calendar and assess effectiveness is scheduled for October 18. DHS and Consortia co-chairs should have this date held on their calendars.

8. Midwest Partners Conference – Indianapolis

- Conference occurred on August 13-15. There were approximately 16 attendees from Wisconsin with a mix of consortia, MILES and state staff.
- Wisconsin received Midwest awards for lowest CAPERS rate and the Jennifer Her award which combines measures on timeliness, accuracy and completion rates. Pictures are available and will be shared.
- Great Rivers received Wisconsin award for lowest CAPERS rate. Bay Lake was presented with Wisconsin award for lowest active error rate.
- QC strategies learned from the meeting will be evaluated and shared at future Performance Monitoring subcommittee meetings. DHS will be pursuing a strategy to create more awareness and education for IM staff on how QC operates and its importance in their daily work.

9. REN Conference – John Rathman

- Conference planning is underway for September 24 and 25 in Sheboygan. Registration is open. OCI and DHS will be sharing on the new health care coverage enrollment partnership and new partnering opportunities being explored.
- REN advisory group is re-purposing its role and will continue to meet monthly.
- REN group is tracking implications of public charge rule.

10. IM Funding and Contract Updates – Debbie Waite and John Rathman

- Negotiations for 2020 Income Maintenance contract kicked off in early July and proposed changes are being finalized. One remaining issue being examined by Office of Legal Counsel is cross reference to reflect different termination contract notice time period based on triggering event. A final tracked changes version will be shared with consortia once resolved.
- WCHSA has signed off on a proposed distribution methodology for CY 2020.
- CY 18 enhanced funding amounts have been calculated and shared with consortia. Goal is to mail checks in October 2019.
- CY RMS numbers are still being calculated by DHS and will be shared when DHS internal review process is complete.

11. Consortia Feedback – John Rathman

- Several consortia noted that the levy amounts in the draft 2018 IM enhanced funding administrative memo chart do not match the levy amounts listed and confirmed in the CY 2018 overmatch report. DHS will check.
- Consortia reported that Q2 and Q3 2018 estate recovery amounts have not yet been loaded into CARs.
- Consortia OK with loading additional 2019 fraud funding amounts in 2019 if available to spend by first week in October.
- With respect to recent faxing issues and delays at CDPU, consortia reported continuing concerns with reliability of process.

12. Administrative Memos – Debbie Waite

- CY 18 enhanced funding admin memo is circulating for consortia review and sign-off.
- Amended CY19 fraud funding memo is circulating for consortia review and sign-off.
- Lobby services admin memo will be re-circulating again with some slight revisions.

13. Miscellaneous Update and Public Comments:

- GAP Case Numbers – See “GAP Case Report July 2019”
- No other public comment was shared.

14. Tentative September 2019 or Future Agenda Topics

- 1115 Waiver and DHS 38 Updates
- CDPU Update

DHS is an equal opportunity employer and service provider. If you need accommodations because of disability, or need an interpreter or translator, or if you need this material in another language or in alternate format, you may request assistance to participate by contacting Andy Best at (608) 266-3824 or Andrew.Best@dhs.wisconsin.gov.

*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.

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Income Maintenance Subcommittee Key Messages
IMAC Training Subcommittee
7/22/19

Agenda Item	Message/Action/Motion	Audience/Recipient (Examples: IMAC, ESPAC, Operational Leads)	Assigned To	Deadline
Medical Expenses for FS-IM Refresher Training Preview	Medical Expense Training Review-Nikki Biddick presented the training. It was developed based on feedback from this group and State QC staff. It is expected that it will take more time than other refresher courses. An estimated time for completion will be available once the course is recorded. Expected publish date is mid-late September. A training announcement will be distributed once the course is available. Action item for group members: Send any feedback to IM Training.	Training Subcommittee and IMAC	Subcommittee Members	
Active Error Rate Training	Dorthy Xiong is working on a refresher training addressing active errors specific to the FS program. She is partnering with the FSQC section to develop it. It will complement the existing CAPERS training and include the top 4 active error areas: wages and salaries, expenses shelter and utilities, HH Comp, unearned income. She will be developing case examples and sharing best practices. It should be available by the end of the year. Action item for group members: Send any feedback to IM Training including examples or suggestions.	Training Subcommittee and IMAC	Subcommittee members	N/A
KIDS IM	KIDS refresher training is being worked on. Update will be	Training Subcommittee and		

Refresher Training	given at October subcommittee meeting.	IMAC		
DHS IM Training Projects & Updates	See handout At the 4/17 Performance Monitoring Committee, Tony Trout gave a presentation on IMMR reports. Tony recorded the training and the training will be available in August on the DHS Learning Center.	Training Subcommittee and IMAC		N/A
Innovative Training	IMOA is looking at innovative training ideas. Discussions have continued at IMOA meetings. The group asked agencies to create small group to provide feedback. The group will convene shortly. In the meantime, progress is being made. Additional resources have been identified including a project manager and resource expert. At the 8/2 IMOA meeting an update will be provided. Our group is welcome to listen in. Goal of the small group is to identify solutions and establish timelines. Action Item for Group Members: Send in any thoughts and/or ideas regarding innovative training to IM Training.	Training Subcommittee and IMAC	Subcommittee members	N/A
New Worker Training Curriculum Review	IM training is continuing to evaluate the existing curriculum to eliminate duplicate information, identify gaps and see how the material is being presented. Ethics and confidentiality has been updated to be more interactive and engaging. They are making the child support course more appealing and comprehensive. More changes are being made including embedding the Application Entry and Effective Case Comments course so new workers have the information early on.	Training Subcommittee and IMAC		
CWW Training Environment Enhancement Project	CWW Training Environment Enhancement Project will be included in Feb 2020 CARES release. Renee will have more information at future meeting.	Training Subcommittee and IMAC		

Cultural Competency Training Roundtable	<ul style="list-style-type: none"> • LEP training –DHS Office of Legal Counsel is developing an LEP training and this will be made available on the DHS Learning Center. It is expected to be published in October. This can be used to meet cultural competency requirement. • MiLES team go around to different units and having staff present topics related to cultural competency from their pathways to leadership program 	Training Subcommittee and IMAC		N/A
Roundtable: Technology	The group shared what type of technology they are using. WREA uses Free Conference Call to record their trainings. It is later published on the training tab of their website. Examples include CWW gatepost, access, HOD, processing an expected change and setting filing date.	Training Subcommittee and IMAC		
Walk on Items	Margaret shared they had hired Tom Prete to do a customer service training. It was well received by staff. Mitch and others shared they had hired Tom as well with positive results.			
Future agenda items	<p>Update on active error rate training</p> <p>Update on KIDS training</p> <p>List of refresher training</p> <p>Innovative training initiative</p> <p>New worker curriculum review and enhancement update</p> <p>CWW Training Environment Enhancement Project</p> <p>Roundtable topic: FS active error rate-common errors and how handling when errors are made.</p>			
Next meeting	October 28 th at 1 via Skype for Business			

Income Maintenance Subcommittee Key Messages
IMOA
August 2, 2019

Agenda Item	Message/Action/Motion	Audience/Recipient (Examples: IMAC, ESPAC, Operational Leads)	Assigned To	Deadline
Distribution List Portal Project	<p>Lisa Epple and Heather Kiepura provided information on the distribution list portal project</p> <ul style="list-style-type: none"> • Will more effectively manage distribution lists and allow a self-service method of organizing contacts • Web-based solution • Project will be available late fall 2019 or early 2020 and will not be tied to a system change • Consortia provided input and it was determined that CARES policy and coordinators list will be combined. Each county will be allowed four contacts • Has flexibility to add mailing address, email, etc. • List owners will be notified via email when changes are made to their list • Consortia agreed that two administrators, who will have the ability to make changes, will be sufficient. <p>Questions from consortia – how will the</p>	All Income Maintenance Agencies	DHS will respond to consortia questions after further research is completed.	

	<p>security/administrators work? DHS is working on that topic.</p> <p>What happens if a worker changes from one consortium to another – who needs to make the changes? DHS will review and get back to the group.</p>			
Policy Updates	<p>Autumn Arnold shared policy updates</p> <ul style="list-style-type: none"> • Act 369 requires the agencies to provide 21 days of comment periods. This includes ops memos. DHS is still learning how to comply and implement. As part of the ops memo review process, will post and publish for 21 days for public comment. Afterwards can be certified and published. Provision in the law that if Governor approves they can publish with only 1 day comment. • Impact to consortia is that they'll be published before they send to us and have other communication. If staff have comments on ops memo, best to use current process in feedback. • May postpone implementation of policies. • Admin memos are also in this process. Will provide us 45 days and then simultaneously publish to the public 21 	All IM Consortia	Autumn to send out link to proposed FS rule. Will research if DHS comments can be shared with consortia.	

	<p>days.</p> <ul style="list-style-type: none"> • Will not impact handbooks, demos, etc. <p>MA – supposed to be determining TB with MAGI rules effective 9/1. Ops memo will be sent next week. Process help will be updated late Aug.</p> <p>FS – broad base eligibility proposed rule. WI have been using this since 2003. Proposed rule is that member must receive a substantial benefit. DHS will engage with public comments sharing concerns that this change will have a ripple effect, including school lunch, administration and system burden. If we wish to have public comments, we can do that by Sept 23rd. Autumn will send out a link to the proposed rule. Will check if they can share DHS public comments</p>			
Call Center Update	<p>Working on communication that will be sent out next week to operational leads and CCA committee members. Address what can be done with CCA in the interim before new system is implemented.</p> <p>Info is being shared at CCA meetings so make sure that staff share info with Managers and Operational Leads.</p>	IM Consortia	DHS to send out email communication. Operational Leads to reach out to CCA members for more information.	
		IM Consortia	Consortia to continue FS	

<p>Precertification Plan and Tool Update</p>	<p>DHS received official notice that we are not in first year federal fiscal liability.</p> <p>Lisa Hanson provided FS pre-certification numbers from consortia. Over 20% error for child support and wages</p> <p>Consortia were reminded to use dropdowns on the excel worksheets.</p>		<p>Precertification Reviews. Reminder to use dropdowns on the excel worksheets.</p>	
<p>Resource Guide Final Update</p>	<p>Reviewed the ADRC/IM Disenrollment Enrollment desk aid, which is the colored chart (former rainbow chart). Plan to roll it out and present information to ensure everyone has consistent information.</p> <p>Subgroup will send to overall ADRC/IM workgroup on 8/8</p> <p>Doreen talked about the ADRC/IM Enrollment Disenrollment plan along with the question if it's still needed now that we have the Enrollment Disenrollment guide and desk aid. All were in favor to discontinue the plan. Workgroup's recommendation will go to upper DHS management for final decision.</p>	<p>IM Consortia & DHS Staff</p>	<p>ADRC/IM Workgroup to determine rollout of Enrollment/Disenrollment Guide and Desk Aid.</p>	
<p>Innovation Training Project Update</p>	<p>One of the RMS funding projects is Innovative Training. DHS contracted with Deloitte Consulting, who will recommend 3 ideas,</p>	<p>DHS & IM Consortia</p>	<p>Deloitte to meet with MiLES, Dane County, and selected consortia.</p>	

	<p>bring to IMOA and upper DHS Management. They will gather information using a subgroup, which includes a representative from all consortia, meet with MiLES and Dane Counties, and asked for other volunteers.</p> <p>Many volunteered. Deloitte will select which consortia and Abby will send an email to all indicating which consortia were selected.</p> <p>This project will begin with changes for new worker training but may help refresher training. Will also broker the power of technology.</p>		Innovative Training Subcommittee to provide input.	
CARES Release Publications	<p>Long-term goal is to update handbooks same time as changes are implemented. Well come back again after oct changes for feedback on content and ops memo changes.</p>	All Income Maintenance Agencies	Consortia to provide feedback on content and ops memo changes.	
Post-Training Survey	<p>Abby reviewed the post training survey that was developed. All agreed with the survey with additions to #2 to include DHS training and that the reports will be provided quarterly to training coordinators and operational leads. After discussion, it was determined that the survey will be sent to staff 6 months after training.</p> <p>The survey will be shared with training committee meeting in Oct and then target rollout for November or December based on feedback.</p>	DHS and IM Agencies	Training Committee provide feedback in Oct.	

<p>Mid-State Soft Skills</p>	<p>Per our previous discussions, Mid-State Technical College send DHS a proposal to develop soft skills training for DHS. The training includes 10 modules. Abby will reach out to them and request detailed info on these modules.</p> <p>DHS Legal and Financial Dept. is reviewing. Proposal is under \$15,000. Training will be owned by DHS and available to new and experienced workers.</p> <p>Consortia can send examples of calls or Call ID of recording to Abby within the next month.</p> <p>All agreed with the expenditure using the RMS Funds targeted for innovative training.</p> <p>MSTCI IM Video – still looking to see if this is a project they can do in spring.</p>	<p>IM Consortia</p>	<p>Consortia send Abby examples of calls or call IDs</p>	<p>Within next month</p>
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Call Center Operational/Technical Workgroup
August 12, 2019, 1:00 PM

Agenda Item	Message/Action/Motion	Audience/Recipient	Guiding Principle(s)	Assigned To	Deadline
Clarification to subcommittee members regarding availability for CCA changes.	<ul style="list-style-type: none"> • Changes can still be made to CCA call flow, messaging and queues. • If your consortium is considering changes please reach out to dhsimacdsupport@wisconsin.gov 				
Genesys update	<ul style="list-style-type: none"> • DHS continues to research available platform options. Focus on procuring a cloud based solution. The procurement process prohibits DHS from providing additional details at this time. • DHS IT continues to research methods to reduce the risk associated with running Java version 6. 				
Initiated discussion regarding CCA post call customer survey	<ul style="list-style-type: none"> • Changes need to be made globally, survey cannot be personalized for consortia. • Survey cannot be utilized in specific counties. It must be utilized by the entire consortium. • Current utilization is minimal; 			Subcommittee members should be prepared to discuss the following items at the September meeting. 1) Does the survey require updates?	Continued discussion at September 9, 2019 meeting

	<p>MiES and one consortium are currently running the survey.</p> <ul style="list-style-type: none"> • Survey report contains raw data; caller answers, worker that took the call, which queue the call came into. • Reports are sent to Admins weekly. 			<p>2) If updates are required what are possible edits that you would like to see?</p> <p>We do not anticipate making significant changes to the current configuration. Please keep these items in mind when offering suggestions.</p> <ol style="list-style-type: none"> 1) Up to 5 questions. 2) Responses must be single digit phone key presses. 3) All consortia and MiES on the same survey. 	
Reviewed power point refresher on CCA Administrator Responsibilities					
Next meeting Monday, September 9, 2019 at 1:00 p.m.					

Income Maintenance Subcommittee Key Messages
Performance Monitoring Subcommittee
August 21, 2019

Agenda Item	Message/Action/Motion	Audience/Recipient (Examples: IMAC, ESPAC, Operational Leads)	Assigned To	Deadline
Best Practices/SMRF	There are weekly reports. Agencies that want to track timeliness need to do some manual tracking. IM Central has more information if any consortia are interested in improving SMRF timeliness for customer service		N/A	
SMRF discussion	SMRFS have an unmoving due date. They can be considered late regardless of how quickly the agency processes them if the consumer submits them late. There will be some information in the QC newsletter and in the training section. Customer education videos on MyAccess would be helpful.	IM workers	Donna King Abby Abernathy Jane Wanless	
Active Error rate	We are still under 6% in this fiscal year. The precert reviews should help keep it lower. September tends to be a difficult month		N/A	
Top 10 QC Errors	Reviewed a handout with the top 10 QC errors. Line staff should be told the importance of QC and why the details matter. the QC tip newsletter is intended to reach line staff.	IM workers	Consortia leads	
2021 CARES Project Requests	Reviewed consortia request for Benefit accuracy changes. Debbie Waite suggested it be broadened to include all programs when possible. the group suggested adding the customer education videos to MyAccess as an additional item		Ann Kriegel	8/30/19
Newsletter	Brainstormed ways to get this to the biggest audience. Will expand distribution list. Suggest that trainers go over it at		LaTanya Baldwn	

	meetings in addition to line staff receiving a copy. Suggested that the publish date be added. Overall considered a helpful tool.			
MEQC Project	The criteria is set by the Feds. Verification codes matter. Workers should not remove DX and put in a different code such as BC. Refutations need to be made within 10 or 30 days- whichever is indicated. Deadline is not extendable. Workers are not always processing AVS correctly.			
Standing agenda items (monthly report)	Docs-will add columns to indicate docs coming in through ACCESS or MyACCESS. SMRFs-will add column to indicate how many processing days		Donna King	