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INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

Thursday, November 19th, 2020

1:00 – 3:30 p.m.

Zoom - <https://dhs.wi.zoom.us/j/96742327146>

For audio dial: 301-715-8592, Meeting ID: 967 4232 7146

1. Administrative Issues (Debbie Waite & Claribel Camacho)
2. Approval of October 15th, 2020 Meeting Minutes (Debbie Waite)
3. Policy Updates (Rebecca McAtee)
 - a. COVID-19 Updates
4. Introduction of New Staff (Rebecca McAtee/LaTanya Baldwin)
5. 2020 MER Review & 2021 Planning (Molly Aird & Vanessa Robertson)
(Attachment)
6. BRITS Agency Participation (Theresa Fosbinder)
7. Subcommittee Updates
(Attachment)
 - a. IMOA (Claribel Camacho)
 - b. Performance Monitoring (Ann Kriegel)
 - c. IM Training (Margaret Romens)
 - d. FPIP (Margaret Romens)
 - e. CCA (Kris Weden)
8. Regional Enrollment Network (John Rathman)
9. Income Maintenance (IM) Funding and Contract Updates (Debbie Waite & John Rathman)
10. Consortia Feedback: IM consortia will share feedback with DHS (Claribel Camacho)
11. Administrative Memos (Debbie Waite)
12. Gap Case Monthly Update / Public Comment
(Attachment)
13. Announcements/Items for future agenda
14. Adjourn

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Income Maintenance Subcommittee Key Messages
IMOA
November 6, 2020

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
I.COVID-19 Policy Updates (Autumn) (handout Planned End Dates for COVID....)	A document was shared with an updated on 10/13/2020. We must keep in mind that the Public Health Emergency may be extended beyond January 2021. Autumn visited some of the Policies listed on this document. For Health Care most not ending sooner than 4/1/2021. For Food Share : SMRFs requirement eliminated through November 2020, end date TBD. Emergency FS allotments planned end date is TBD; interviews continue to be waived and end TBD. SWICAS , looks as there may not be a run in January 2021 and will be evaluated on a quarterly basis.			
II. Other Policy Updates - Autumn	C9 codes, it is expected to be caught (removed) at next renewals, but areas such as assets were, we have data exchanges, CMS expects we use those. Last week CMS issued guidance prevention of terminations: previously they said no increases on patient liability and cost share, but this may increase assets, now they are giving States the choice of acting on those. WI is looking at when they could feasibly implement this change. GAP – will not be ending this year, notices are going to be prepared to be changed. SUSPENSION FOR IMMATES: case remains in the consortium where the family lives. REN – DHS working on where questions may be sent, DHS is still working on this			
III.Genesys Update Paul Michael (2 attachments were mailed to Consortia the morning of	Getting close to a final schedule. Paul Michael went over the attachments provided today (via email). Explained the many moving parts of this project, work completed. Initially this was thought of a 6-phase project, but it is a 5-phase project now (see timeline	??? /question about training mid-April to mid may		

<p>11/6/2020 – sender Paul Michael)</p>	<p>page 7) some items changed. Consortia will begin in 7/15/2021. There is some room for movement. There are some differences as similar events happened in the past, as a move must be placed with Telcom for the toll-free numbers, now. Ms. Waite inquire about the August implementation, school restarting and how this would impact the Consortia. Paul Michael stated that he is confident on the move as this is a web application. Miles inquire about communication to Community Partners, in the event there are issues with the implementation. Ms. Waite will bring it up to the new section that works with Outreach (Jane Wanless). Doreen Lang asked about training available ahead of time: the answer from DHS Genesys cloud project is:</p> <ul style="list-style-type: none">•<i>The general training will be available in advance of the pilot. Any worker should be able to view this training from that point on. The telephonic signature specific training will be available in advance of the first IM rollout (phase 2)</i>•<i>We plan to make the platform available to each phase's agents for testing/training about 3 weeks prior to each phase's rollout.</i> <p>Recorded scripts are included, as well as loading the script on ECF. Paul asked to look at the COMMUNICATIONS PLAN (2-page hand out) / and continued to highlight that would be meeting with IT Departments across the State, after their already accomplished initial contact. The plan is to discuss firewalls, continued communication, implementation. Genesys has their own user manual. THE FOLLOWING ARE RESPONSES TO QUESTIONS ASKED: Phone calls are delivered as they are now, however in the future they would like to deliver over the internet. Paul stated there may be a possibility that additional scripts may be recorded in the future. However, items may need to be prioritized moving forward. Genesys will offer call back, as a preference over voice mail messages.</p>			
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<p>iV. CARES Security Updates - Carla Treuthardt (points as listed are included in the IMO A Agenda)</p>	<p>Writing manuals, gaining on this. Working with the Security Work Group. The second workgroup is the confidential caseload group: Doreen is a member of this group, working on case scenarios, doing some testing. Doreen detailed scenarios / security structure that they have been working on. Carla mentioned that there are issues with WAMS accounts not fully completed and would take feedback as of how this issue can be resolved, as they must email counties back on each case. Another scenario is multiple accounts where there is an email that is no longer active. On this the user should email AIMS and in other scenarios should be an account recovery action. completed. No one should be completing a WAMS account for an employee. SharePoint access – no updates. There would be a training available for security officers in the future.</p>			
<p>V. Innovative Training Update - Julie Rentmeester (Power Point Presentation was sent with the IMO A Agenda)</p>	<p>Julie went over the Power Point sent to the Consortia, high level overview. The goal is to have everything completed by the ends of 2021. Looking at the business success and impact of this program / project. Julie visited the key focus areas, that include Training Call Center transition, technology and overall items that will feed into the program. Next: infrastructure and mapping. Regarding technology needs: input was collected from training subgroup, with the current COVID practices, working from home, Julie does not see any “show stopping” issues or concerns. Will confirm any recommendations with he Is training Group.</p>			
<p>VI.Lobby Services Expectations – Vanessa Robertson (a handout was provided with the IMO A Agenda)</p>	<p>There is a group meeting with Vanesa. There were Areas identified as FNS mandatory: Vanessa talked about face to face appointment requests for FS, where we can use Zoom, Google Duo, and other apps – this is under discussion as a possibility. She also talked about wrong address on BCP premiums and will be looking why this is happening- this will be assigned to someone</p>	<p>Feedback accepted by the 16th of this month; it would be helpful to adjust the memo. Email feedback to Alicia Gruelke and Vanessa Robertson</p>		

	to follow further.			
VII.Future Agenda Topics (All)				
WALK ON ITEMS:	<p>MEETING WITH NEW CARES CALL SUPPORT CENTER: Working on a listening session with the Consortia Leads, after BEPS reorg. We are looking at dates, there is a doodle poll that was sent to the Consortia Leads, please respond if you have not. November 18th is coming up as the potential meeting date. In addition: there would be questions sent to Consortia Lead. If the Consortia Lead would like to send questions, please send those to Alicia Gruelke.</p> <p>FURLOUGHS / HIRING FREEZE / LAY OFFS: Some significant developments with furloughs and layoffs have been brought up by the TriChair. Debbie asked the Consortia Leads if there are significant changes at the Consortia on the above, and if these are or would be causing issues with customer service. Would it be helpful to send a portion of questions previously sent, related to this topic, to the Consortia? There were some responding that this would be helpful to gather. Debbie and the TriChair would meet and pull relevant questions from a spreadsheet that was previously sent to the Consortia. The questions then will be sent to the Consortia Lead at a date TBD.</p>	<p>Questions due no later than 11/11/2020</p> <p>Tri Chair, Alicia G and Debbie W.</p>		

NOTE: Debbie Waite introduced **Jori Mundy**, a new Deputy Director within DMS – worked with the Texas Department of Health and Human Services, knowledgeable in eligibility. She also determined eligibility in the State of Indiana. Part of her mission would be determining, prioritizing and organizing the Bureaus meetings.

**Income Maintenance Subcommittee Key Messages
Performance Monitoring
11/18/2020**

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
Announcements	LaTanya Baldwin is stepping back as Chair and Stevey Poppe will be the DHS CoChair. Thank you LaTanya and Welcome Stevey!			
Recap 9/16/20 meeting	Robust discussion on errors and the root causes of error			
ERV	The reports were created using new data beginning with September. Consortia should notice less duplication, but typically September is a month with a lot of hits. Most agencies noticed a decrease in duplicates starting with November.			
PERM updates	Corrective action plan has been submitted to CMS but not yet approved due to COVID. 2022 Contractor/Vendor talks have started			
Monthly consortia report	Discussed metrics that have meaning for the consortia. Many items about timeliness, but not as much about quality. Considering notating COVID months.			
Consortia round table-reports Performance measures	Consortia shared successes and challenges with performance right now. COVID creates a unique environment with temporary policies and different amount of work. Challenge is making sure staff are trained for both COVID and post COVID workload. Agencies are stressing to staff to take extra time right now to self-check cases.			
Consortia Round table QC Error Findings/QC	Feds are requesting this information. How are we letting staff know information and how are cases being corrected-who is correcting them. This varies a little by consortium. most having the staff correct it and are			

tips/Supplemental materials	using the errors in newsletters and refresher trainings as well as staff meetings. Consortia are using websites with dashboards to keep staff up to date. Some consortia also have a QC Lead now as well who does quality assurance internally or spear heads initiatives for error reduction. Western is making pod casts for tips/error reduction.			
Future agenda items				

Income Maintenance Subcommittee Key Messages
IMAC Training Subcommittee
October 26, 2020

Agenda Item	Message/Action/Motion	Assigned To	Deadline
2021 Training Subcommittee Charter <i>Abby Abernathy and Margaret Romens</i>	Abby reviewed 2021 IMAC Training Subcommittee 2021 Goals. They were approved by the subcommittee. Participant and Meeting Group Guides were shared. Members were told they could pass along copies to others.		
Training Updates <i>Abby Abernathy</i>	Handout reviewed with updated and new trainings listed.		
Refresher Trainings <ul style="list-style-type: none"> • KIDS Refresher Training Feedback <i>Kara Mueller</i> • Gap Filling Refresher Training (Handout) <i>Courtney Savercool</i> 	<p>KIDS refresher training: It was originally published at the end of August. After the release, feedback was quickly received. The training section made necessary edits and clarifications within the training. It was republished in September. Committee members said they appreciated that feedback was well received and the how quickly the changes were made to the training. Mitch asked if committee members could share any KIDS training they use.</p> <p>Gap filling outline reviewed. No timeline but the goal is spring of 2021. The training will include how to identify GAP cases, what to include in case comments and how to calculate income verification. It will also reinforce what information to include in e-mails to EM CAPO. Lastly, examples will be worked through. It was suggested they add a self-employment example.</p> <p>Action Item: Share KIDS training materials with Mitch Birkey.</p>	All members	
Innovative Training Project <i>Julie Rentmeester</i> (Handout)	<p>PowerPoint on the Innovative Training Project Update presented. There are four phases: Phase 1-technology infrastructure evaluation and LMS functionality elements, Phase 2- program development, learner support and cohort design, Phase 3-professional development for trainers and Phase 4-program pilot and evaluation.</p> <p>Total alignment activities are under way. Technology infrastructure information has been gathered and it is similar across the State. Overall, this piece is looking good. Currently Julie is looking at Learning Management System (LMS), named CornerStone, which could be used statewide. If all goes well, it will be installed in</p>		

	<p>January of 2021 however IM agencies will not see it until DHS IM Training goes live with the Innovative Training project</p> <p>Committee members have been gathering information about technology that is available to new workers and how new worker curriculum is structured with other activities. Content mapping has started. LMS naming conventions are being used for ease of searching.</p>		
<p>Mid-State Soft Skills Training <i>Abby Abernathy</i></p>	<p>The State collaborated with Mid-State Technological College to create a soft skills training curriculum. It was published October 21, 2020. It has been added to New Worker curriculum in-between the OCM Basics and OCM Advanced module. There are no prerequisites so workers can access it anytime. Clerical staff or any other staff that have access to the Learning Center can also take the course.</p>		
<p>Enhanced New Worker Training <i>Renee Kurka</i></p>	<p>Due to COVID, these training have been recorded instead of offered live. The IM Training Section will notify us when they will go back to offering these as webinars. 2020-2021 sessions have been posted to the Learning Center but they may change due to COVID.</p>		
<p>Cultural Competency Roundtable <i>Margaret Romens</i></p>	<p>No new training options were shared.</p>		
<p>Training Roundtable</p> <ul style="list-style-type: none"> • Training in a virtual world • Any new trainings developed 	<p>Consortium wide ESS meeting were discussed. Two agencies had held them and one had one coming up. The groups shared they were using Zoom and Google Teams. The limitations on sharing videos with a group that size were discussed. Other best practices such as using webinar rather than meeting and polling options were shared.</p>		
<p>IM Training Admin. Memo <i>Abby Abernathy</i></p>	<p>This is in the process of being updated and they are hoping it will be released soon. SSA training will be required. There are no changes to other IM workers requirements. Cultural competency will continue to be flexible. Refresher trainings will still be required. The Civil Rights training will have a few updates (fixing broken links). Clerical staff will be required to complete 6 hours of professional development. The mandated trainings count toward professional development</p>		
<p>Walk On Item <i>Renee Kurka</i></p>	<p>New worker SAVE training update. Our access State training USCIS has been removed. No date for republishing but use we can still use their resources within the State program. The State IM section is currently working on re-establishing access and will be publishing a alternative training in the meantime. New workers should</p>		

	skip the tutorial for now. More information will come once alternative training is available.		
Future Agenda Items <i>All</i>	<ul style="list-style-type: none"> • Refresher: Gap Filling Training • Innovative Training Project • Soft Skills training feedback • Roundtable topic 		
Upcoming Meetings <i>Abby Abernathy</i>	<p>Next Meeting: January 25th, 2021</p> <ul style="list-style-type: none"> • April 26th, 2021 • July 26th, 2021 • October 25th, 2021 		

Income Maintenance Subcommittee Key Messages
IMAC Fraud and Program Integrity
November 10, 2020

Agenda Item	Message/Action/Motion	Assigned To	Deadline
<p>ITAU Updates <i>Tami Tolliver</i></p>	<p>The unit is fully staffed with eight investigators and one full time overpayment specialist. All staff have been working from home. They are available via phone or e-mail, if county staff want to reach out to them. They had a goal for 2020 to have all 2019 referrals completed. They reached that goal. Some staff are already working on referrals from June of 2020. The unit received a several hundred referrals per month.</p> <p>Statistics: 633 investigations completed through end of 10/20. 3.5 millions in overpayments have been completed and 53 IPV's.</p> <p>Updates on two fraud rings:</p> <ol style="list-style-type: none"> 1. Great Rivers-Skimming Investigation-They heard back from Florida investigators and are in the process of reaching out to WI clients asking for notarized statements that they did not authorize their benefits being spent in Florida. 2. Bay Lakes-moving forward on prosecutions 		
<p>PARIS and Trafficking <i>Candice Canales</i></p>	<p>The unit is fully staffed with three in PARIS and three in trafficking. Three of the staff are involved in BRITS workgroups.</p> <p>Michelle Flood from DCF shared that there are not many states that participate in CC trafficking. They do work with OIG PARIS for CC out of state cases.</p> <p>OIG staff now have access to ECF capture so they can now can upload documents directly into ECF.</p> <p>Staff are going to be moving away from using personal phones to using CCA so calls can be recorded.</p> <p>At their last meeting, the staff talked about stress. People did not realize the stress they were feeling between the election and COVID.</p>		

<p>BRITS reports <i>Tami Tolliver and Margaret Romens</i></p>	<p>Allyson Miller and Wali Urehaman from DCF joined the meeting. There was a lengthy discussion about BRITS Fraud reports. Theresa mentioned that she and Allyson had been looking at how low county usage of the reports was. The subcommittee agreed agencies were not familiar enough with what information they could get and how to access.</p> <p>Wali said that they would design specific reports based on individually county or consortium needs. He said they recognize that agencies structure their work differently.</p> <p>Wali said here are three levels of training available, basic WEBI, advanced WEBI and specific program WEBI training. He will connect with the trainer and share upcoming dates. We can also request a training just for fraud related reports.</p> <p>Action Items</p> <ol style="list-style-type: none"> 1. Forward BRITS training dates once received from Wali 2. Add BRITS reports to ESPAC agenda 	<p>Tami and Margaret and Claribel</p>	
<p>2021 FPIP Subcommittee Charter <i>Margaret Romens</i></p>	<p>The 2021 goals for the subcommittee were reviewed. Facilitator and participant guides were shared.</p>		
<p>Future Agenda Items <i>All</i></p>	<ul style="list-style-type: none"> • BRITS report update • OIG unit updates • Statistics 		
<p>Next meeting</p>	<p>February 9th, 2021</p>		

Income Maintenance Subcommittee Key Messages
CCA Operational Technical Workgroup
November 9, 2020

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
Genesys Updates and Discussion Items	<p>Paul Michael reviewed highlights and progress of Genesys Cloud Project Communication Plan and power point presentation given at IMOA Subcommittee meeting.</p> <p>Training</p> <ul style="list-style-type: none"> • Agent training will be created and administered via the DHS Training Subcommittee. • Trainings will be offered to call center agents, supervisors and administrators. • Training for telephonic signatures will be available around the middle of June 2021. Information on telephonic signatures will be available in Process Help. • General use of application training will be available three weeks in advance of pilot rollout. • Call flow training will be available 30 days prior to rollout. Agents will have the ability to practice taking calls and initiating calls in the Genesys system. • Additional training for call center administrators and supervisors. <p>State will move users already set up in CCA to the Genesys program.</p>	<p>CCA Operational Technical Subcommittee will discuss telephonic signature in greater detail before transition.</p> <p>Consortia should enter 2021 holidays into CCA. State staff will make conversion to Genesys.</p>		

Next meeting

Monday, November 30, 2020 at 1:00 p.m.