

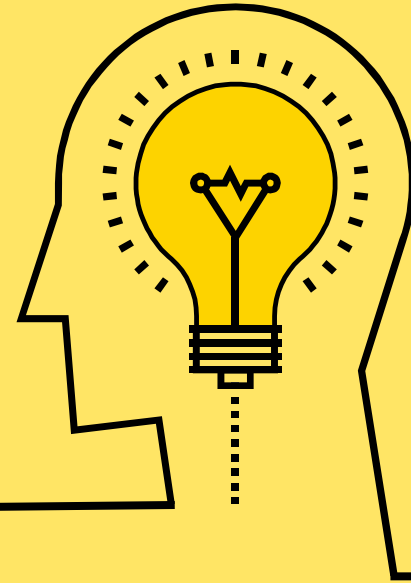


# Pre-Certification Review

IMAC Presentation

January 2022

# Project Overview



# Project Overview

## Background

This project aims to develop a statewide tool in CARES to improve the FoodShare error rates and reduce overpayments.

PCR (Pre-certification Review) teams within the IM consortia will have the opportunity to review a selection of FoodShare cases before confirming eligibility. A PCR workflow will be developed to enable PCR supervisors to assign reviews and PCR reviewers to conduct reviews, flag errors, and communicate with IM caseworkers for follow-up actions.

## Vision

- Enable a PCR staff from IM agencies to review FoodShare cases directly within CWW before confirmation of the case
- Reduce the error rate
- Maintain processing timeliness
- Automate the PCR review process as much as possible

In the long term, the project vision is to use this automated tool to conduct pre-certification review in programs other than FS.

# Key Goals

Our goal is to reduce the case error rate while maintain timeliness. At the same time, the tool should allow the IM agencies to customize case sampling and PCR reviewers/supervisors to manage their workloads.



## Improve Error Rate

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The overall error rate that leads to overpayment or underpayment for FoodShare cases should decrease



## Maintain Timeliness

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The PCR tool will maintain agency timeliness for processing CARES applications.



## PCR Sample Effectiveness

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The PCR tool will enable IM agencies to configure and customize case sampling. The PCR supervisors/State users can adjust criteria for PCR samples to select more error-prone cases

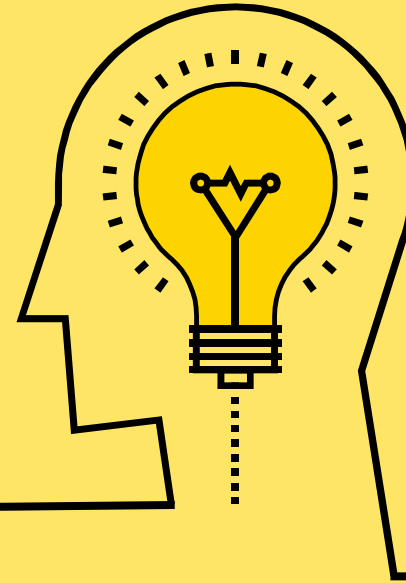


## Reduce IM/PCR Workload

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Workload shall be manageable for both PCR staff and IM staff and reduce backlogs.

# CWW Overview



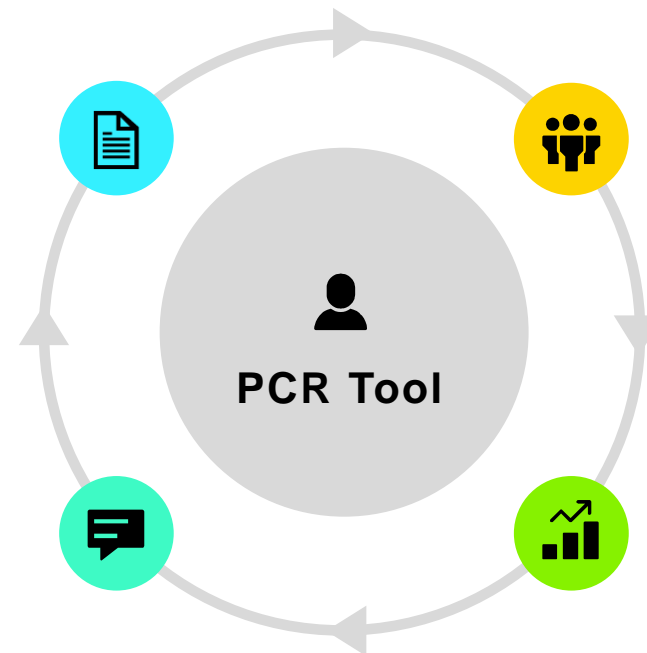
# Key CWW Functionalities

## 1. FoodShare AG Confirmation

Based on the IM agency pre-defined criteria, a case will be selected for review, and the IM worker cannot confirm the FoodShare AG until the pre-certification review (PCR) process is completed for a case.

## 2. New PCR Workflow

Develop a pre-certification review workflow and notation functionality in CWW to facilitate the PCR process within the IM consortia between reviewers, supervisors, and caseworkers, including assigning/initiating of reviews, communicating of agreement/disagreement on review findings, monitoring the review due dates and completing the reviews.



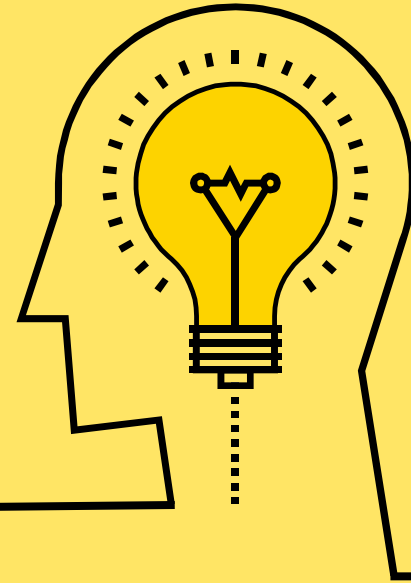
## 3. Customized Case Sampling

Develop a PCR administration module for IM agencies to configure and customize their case samples, PCR teams, and PCR driver flows.

## 4. Caseworker(IM) Workload Management

Enhance the CWW dashboard to “hold” the cases that are routed for pre-certification review and disable confirmation permissions before the PCR process is completed. The IM workers can track the progress of PCR review through enhanced CWW dashboard. New work item will be generated to inform the IM worker to either fix the errors or to confirm the case.

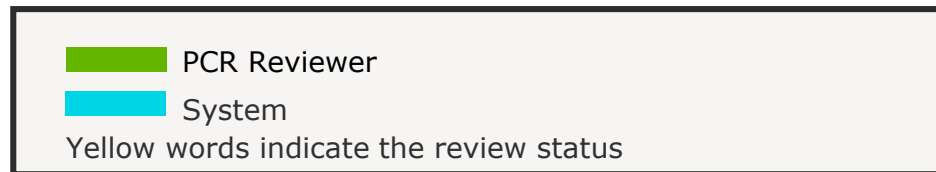
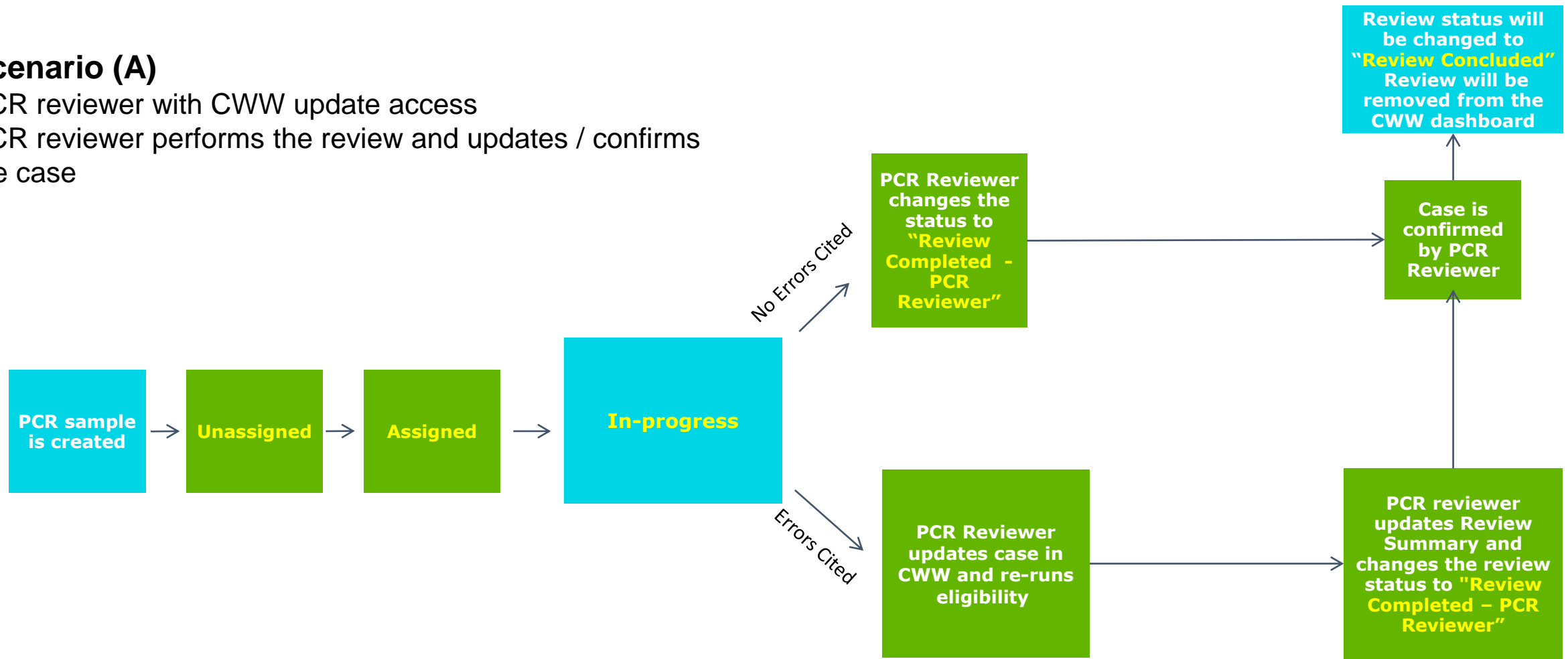
# Application High-Level Flow



## Scenario (A)

PCR reviewer with CWW update access

PCR reviewer performs the review and updates / confirms the case

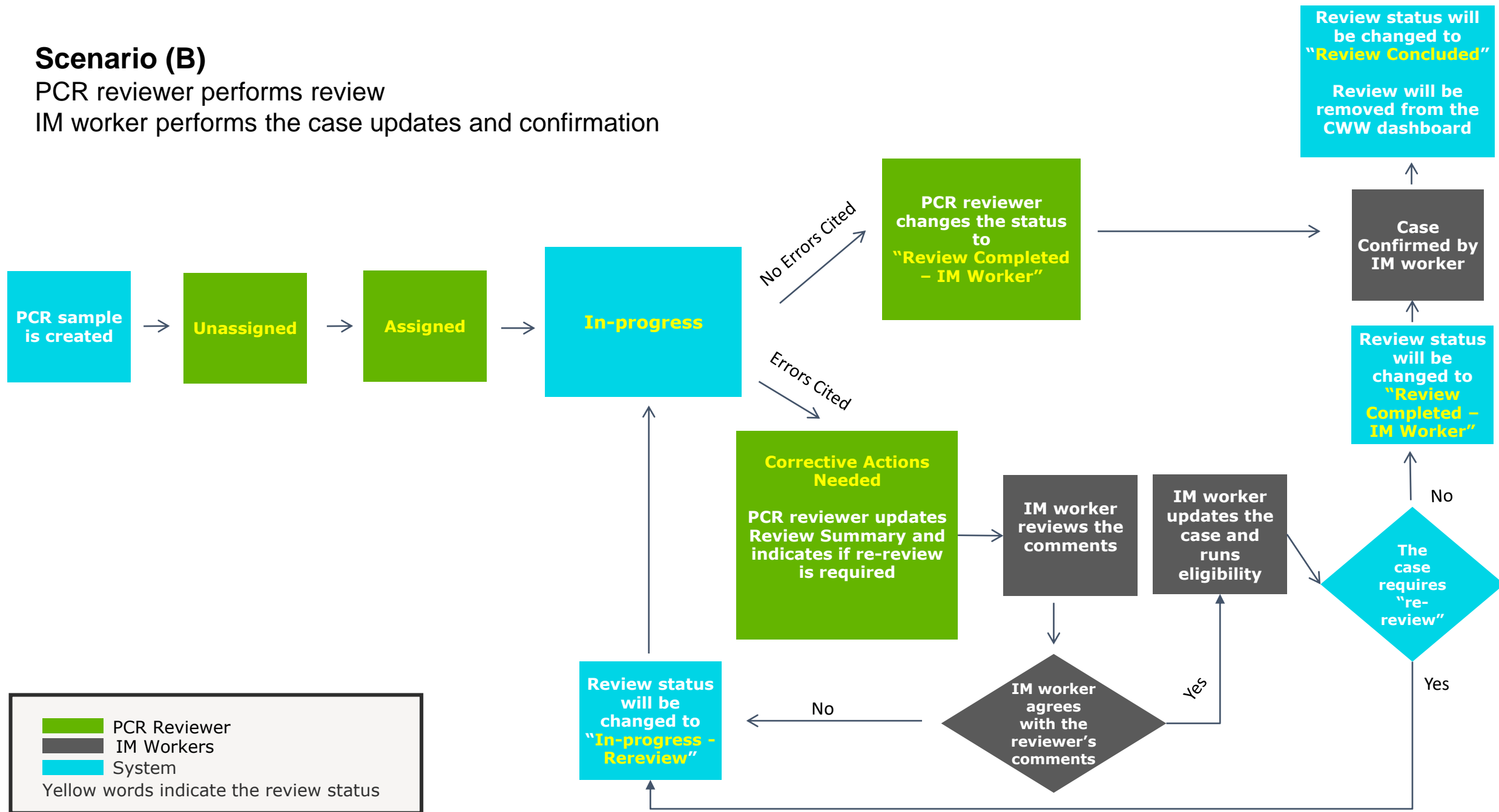




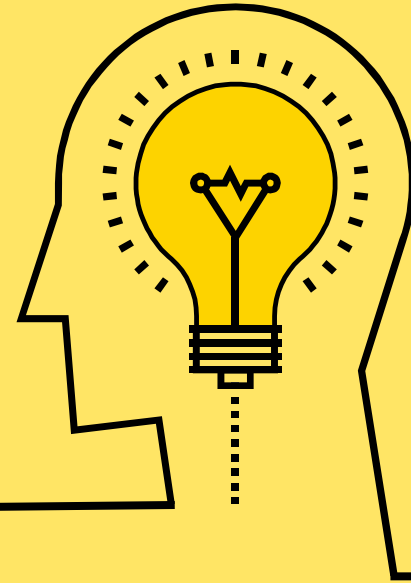
## Scenario (B)

PCR reviewer performs review

IM worker performs the case updates and confirmation



# IMMR (Analytics) Overview



# Analytics Dashboards Overview

Four Tableau dashboards will be hosted on *Analytics for CARES* and created for DHS staff and IM and PCR supervisors to monitor the pre-certification review process error rate, timeliness, and PCR sample effectiveness.

## PCR Outcomes for IM Worker Dashboard

Tracks the review and allotment amount error rates for the IM workers to determine training needs.

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### Business Goal:

- Reduce Error Rate

## PCR Error Monitoring Dashboard

Tracks the most frequent errors and the review and allotment error rates.

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### Business Goal:

- Reduce Error Rate

## PCR Timeliness and Efficiency Dashboard

Monitors the PC review timeliness, identifies bottlenecks in the review process, and monitors worker efficiency in completing reviews.

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### Business Goal:

- Maintain Processing Timeliness

## PCR Sample Criteria Effectiveness Dashboard

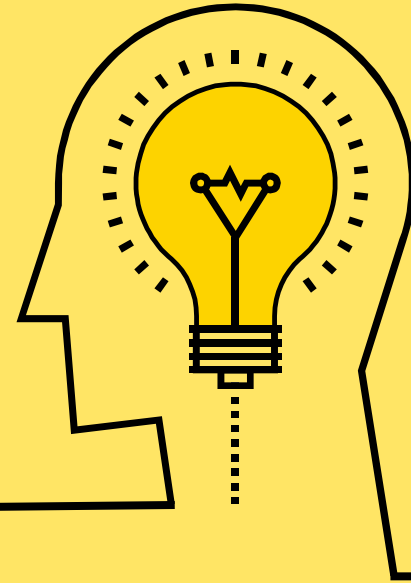
Tracks the sample criteria effectiveness rate for each of the PC review sample criteria.

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### Business Goal:

- Prioritize Error-prone Cases
- Inform Sample Criteria Effectiveness

# PCR Outcomes for IM Workers Dashboard



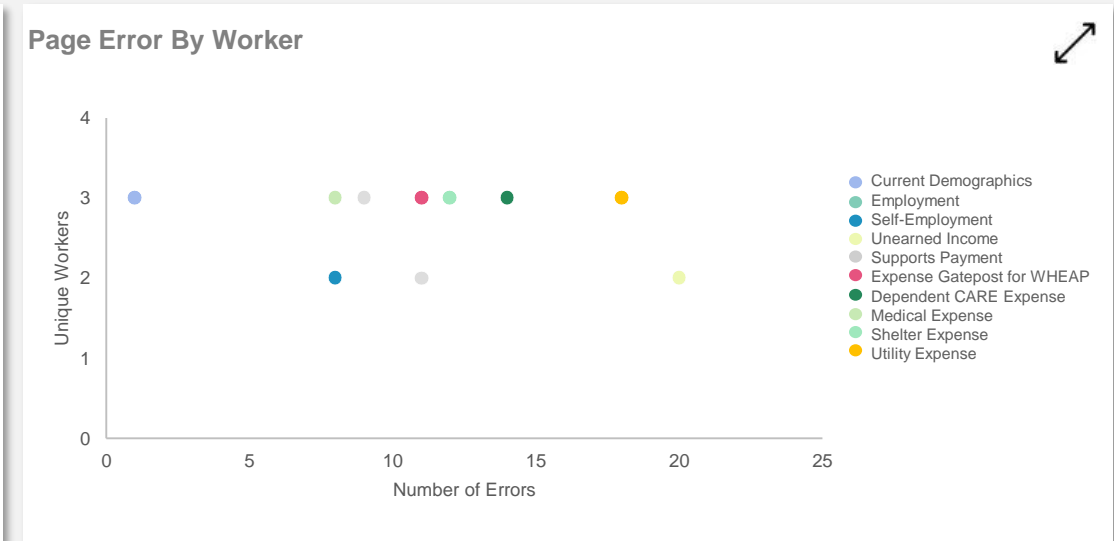
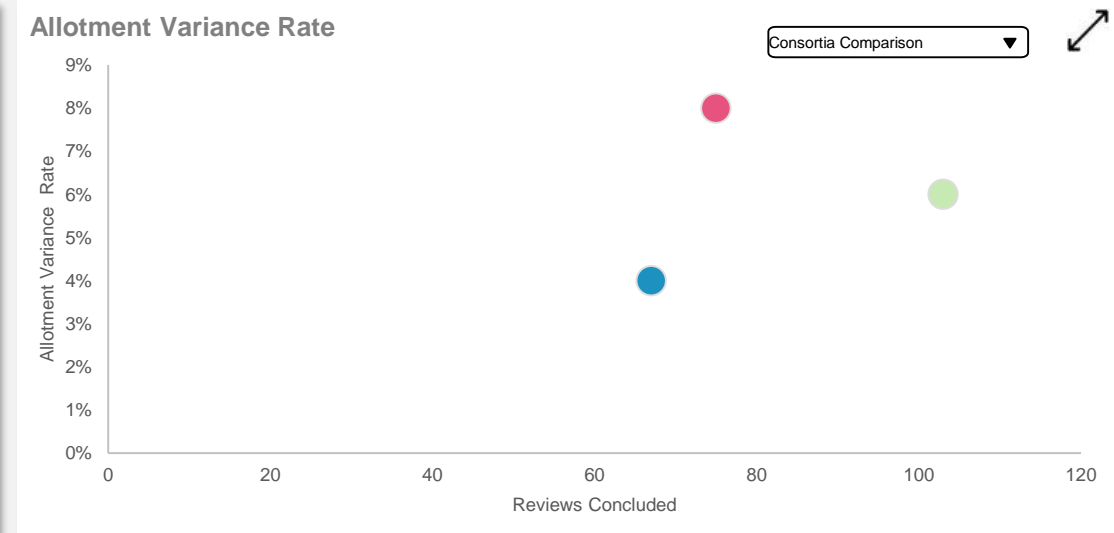
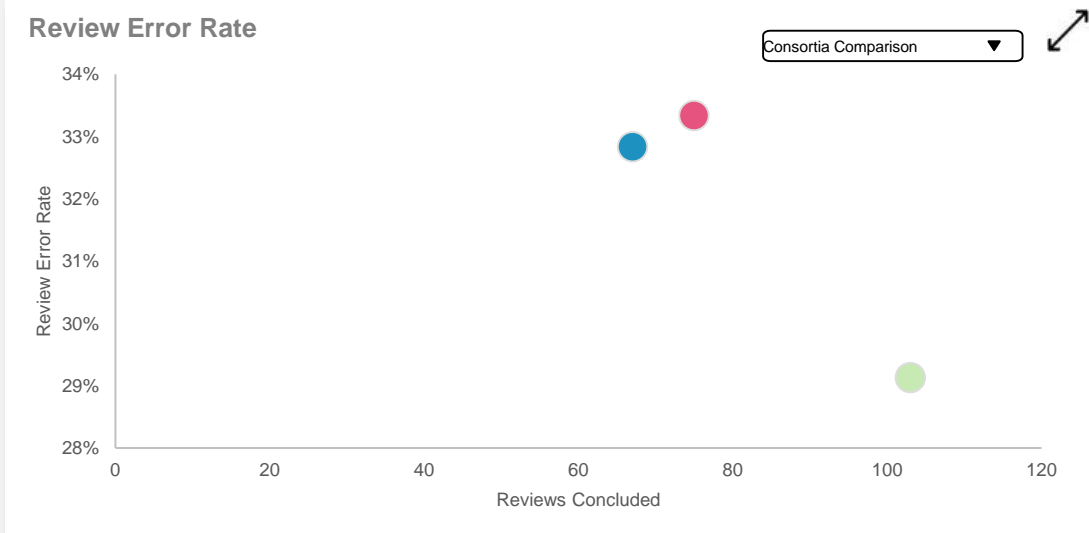


# PCR Outcomes for IM Workers Dashboard

Data As Of: 12/31/2022 11:59 pm



<b>245</b> Reviews Concluded	<b>77</b> Reviews In Error	<b>31%</b> Review Error Rate	<b>6.0%</b> Allotment Variance Rate	<b>2</b> Avg. Number of Errors per Review	<b>55%</b> Workers with a Review in Error	<b>20%</b> Worker Error Cause
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## IM MANAGEMENT REPORTS

GLOBAL FILTERS  
RESET

Start Date: 1/1/2022  
End Date: 12/31/2022

Time Range  
All Available Data  
Last 12 Months  
Last 6 Months

Consortium  
Multiple values

Agency of Administration  
All

Team  
All

IM Worker  
All

Work Item Type  
All

View PC Review Error Data:  
[PCR Error Monitoring Dashboard](#)





# PCR Outcomes for IM Workers Dashboard - Error Details

Data As Of: 12/31/2022 11:59 pm



Sort By  Sort Order

Case Number	Review Number	Review Concluded Date	Consortium	Agency of Administration	IM Worker	PCR Reviewer	Work Item Type	Page	Element in Error	Error Cause	Element is Missing Information	PCR Reviewer Page Comments
1000682	1047262	10/14/2022	01 – Northern Consortium	Forest	XCT001	XCY980	Application / Program Add	Current Demographics	Living Arrangement Type	CARES Error	No	This field has selected the wrong arrangement type
1000682	1047262	10/14/2022	01 – Northern Consortium	Forest	XCT001	XCY980	Application / Program Add	Self-Employment	Monthly Hours	Worker Error	Yes	
1000683	1047261	10/11/2022	01 – Northern Consortium	Bayfield	XCT000	XCY980	Renewal	Utility Expense	Begin Month	CARES Error	No	This date is not correct and not matched with the last updated date.
1000683	1047261	10/11/2022	01 – Northern Consortium	Bayfield	XCT000	XCY980	Renewal	Utility Expense	Utility Type	Worker Error	No	This date is not correct and not matched with the last updated date.
1000683	1047261	10/11/2022	01 – Northern Consortium	Bayfield	XCT000	XCY980	Renewal	Unearned Income	Verification	Not Provided	No	The individual did not provide verification for the unearned income.
1000684	1047260	10/15/2022	01 – Northern Consortium	Forest	XCT002	XCY980	Ongoing	Utility Expense	Utility Type	Worker Error	No	This date is not correct and not matched with the last updated date.
1000684	1058372	2/08/2022	01 – Northern Consortium	Forest	XCT002	XCY980	SMRF	Supports Payments	Court Ordered	Client Error	Yes	

Start Date  End Date

Time Range  
 All Available Data  
 Last 12 Months  
 Last 6 Months

Consortium

Agency of Administration

Team

IM Worker

PCR Reviewer

Work Item Type

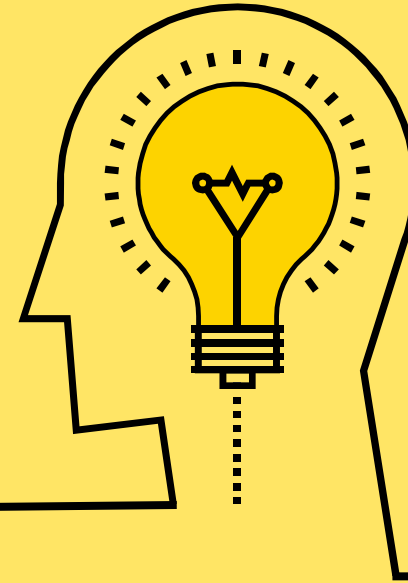
Page

Element in Error

Error Cause



# PCR Error Monitoring Dashboard





<b>1077</b> Reviews Concluded	<b>150</b> Reviews In Error	<b>14%</b> Review Error Rate	<b>6%</b> Allotment Variance Rate	<b>10</b> Reviews with Missing Information	<b>3</b> Avg. Number of Errors per Review	<b>20%</b> Worker Error Cause
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## IM MANAGEMENT REPORTS

GLOBAL FILTERS  
RESET

Start Date: 1/1/2022  
End Date: 12/31/2022

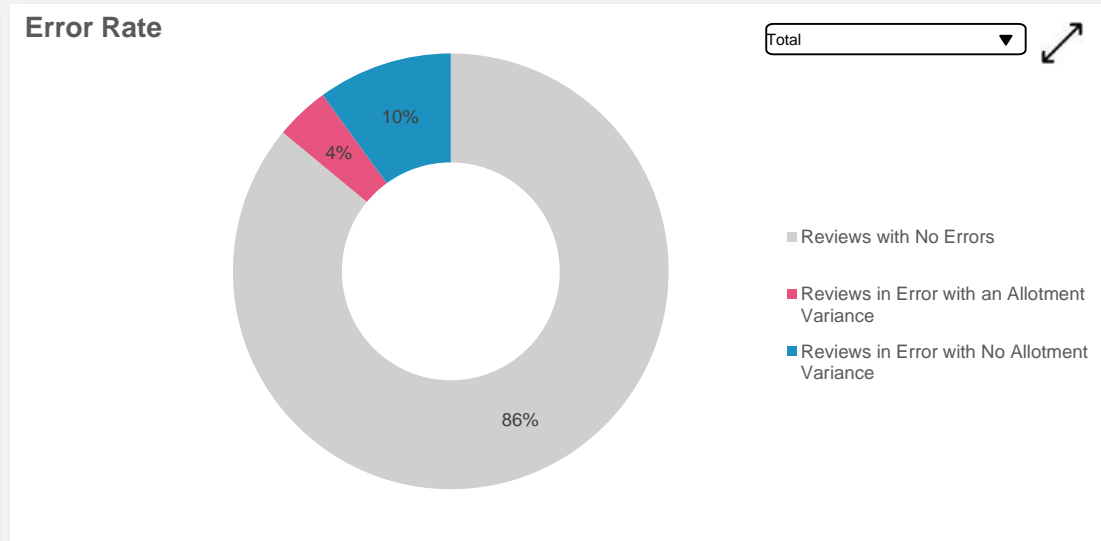
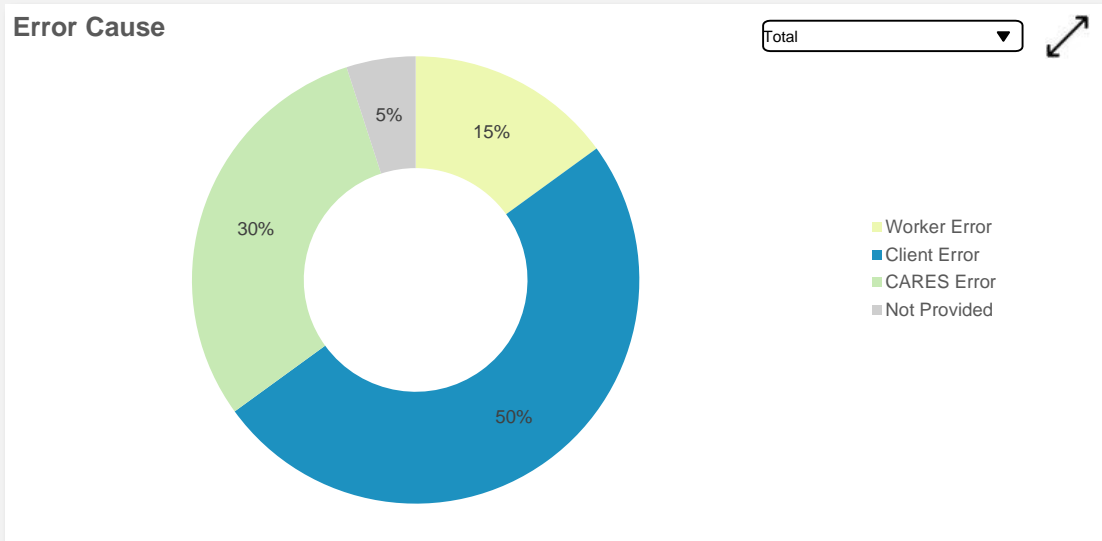
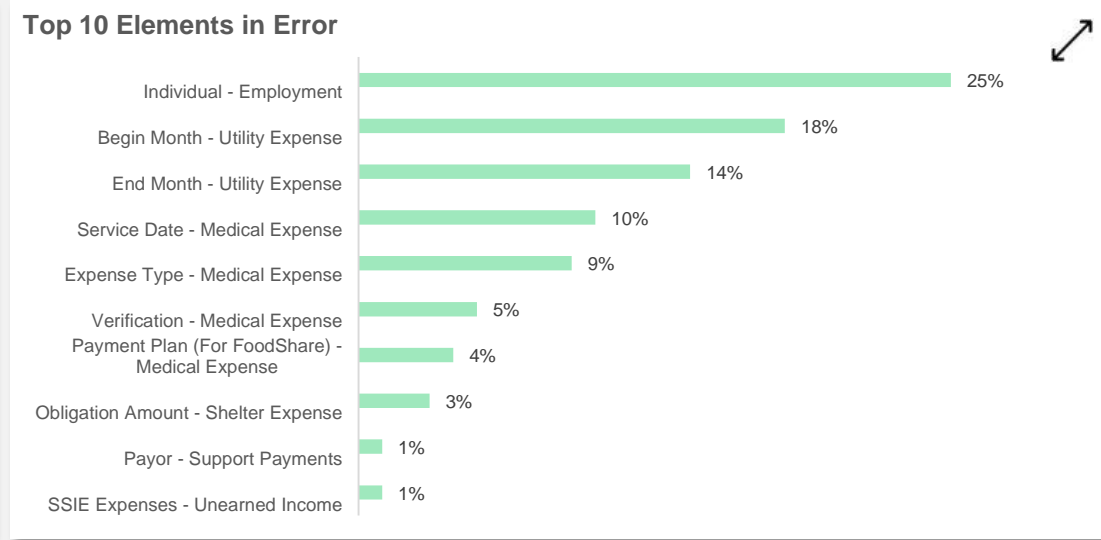
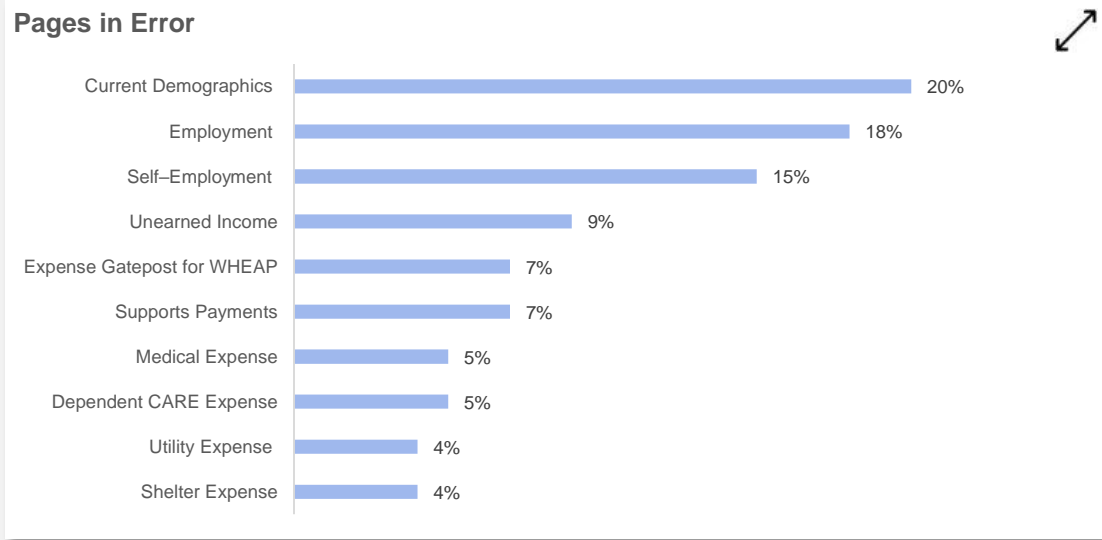
Time Range  
 All Available Data  
 Last 12 Months  
 Last 6 Months

Consortium  
All

Agency of Administration  
All

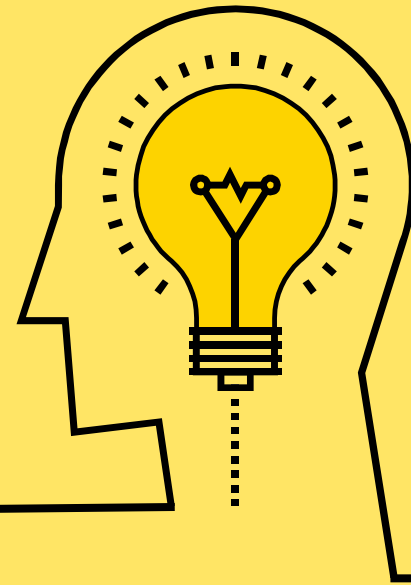
Work Item Type  
All

View IM Worker Data:  
[PCR Outcomes for IM Workers Dashboard](#)





# PCR Timeliness and Efficiency Dashboard





# PCR Timeliness and Efficiency Dashboard

Data As Of: 12/31/2022 11:59 pm



**63,600**  
Reviews Completed

**90.2%**  
Reviews Completed Timely

**99.3%**  
Reviews Confirmed Timely

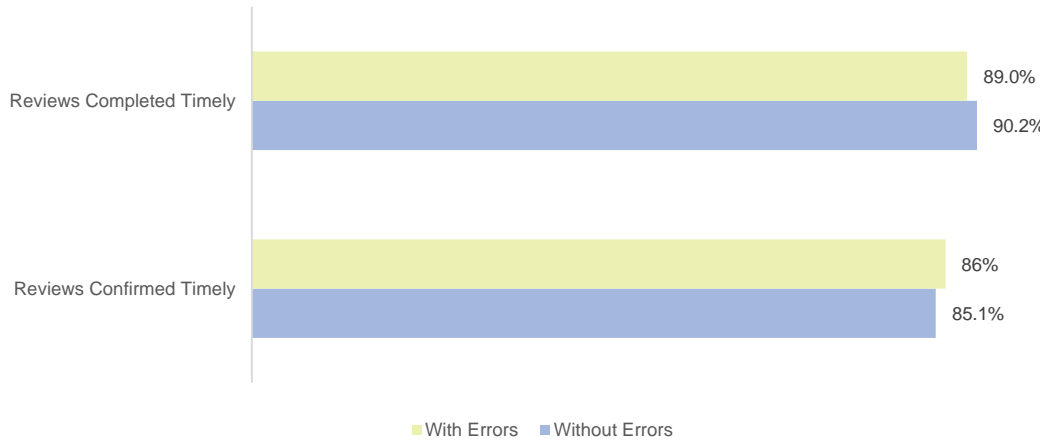
**89.0%**  
Reviews with Errors Completed Timely

**4.5**  
Avg. Days to Complete a Review

**1.1**  
Avg. Days to Confirm a Review

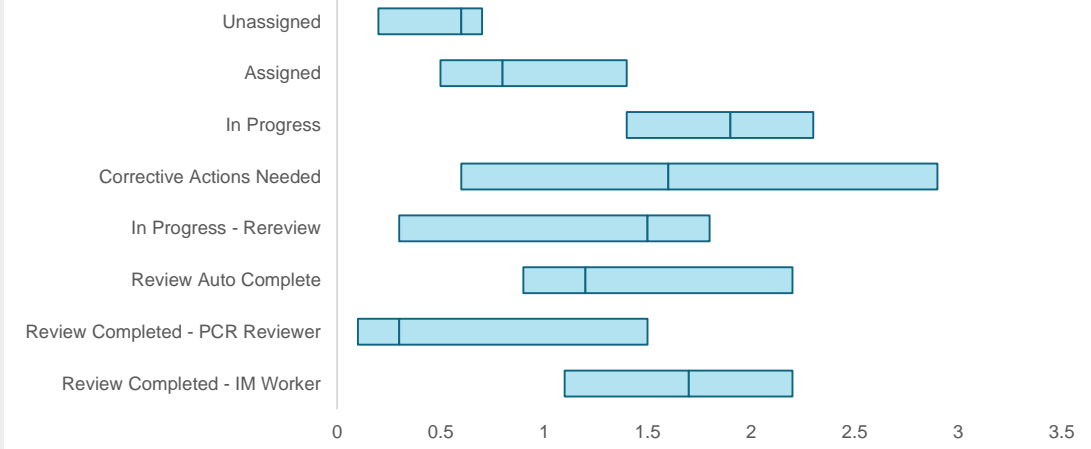
## Review Timeliness

Summary



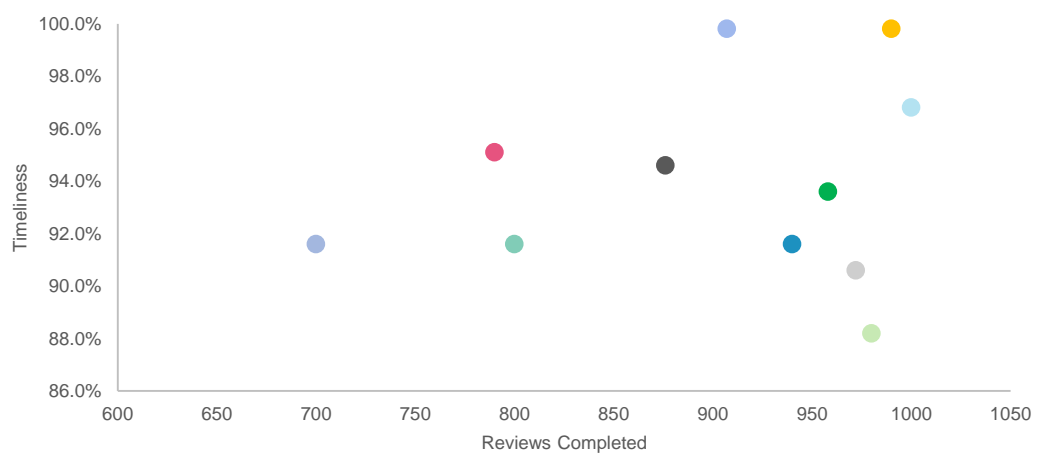
## Time Spent in Reviews Days

Summary



## PCR Efficiency

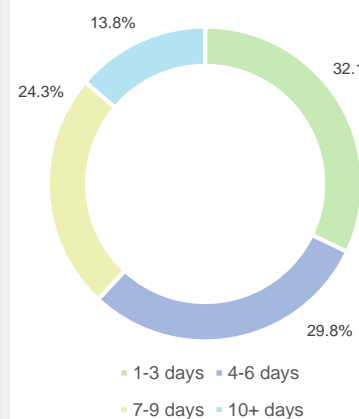
Timeliness by Consortia



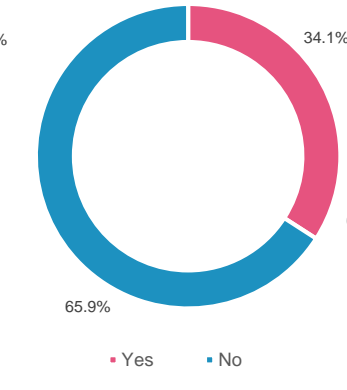
## Timeliness Insights

All Reviews  Untimely Reviews

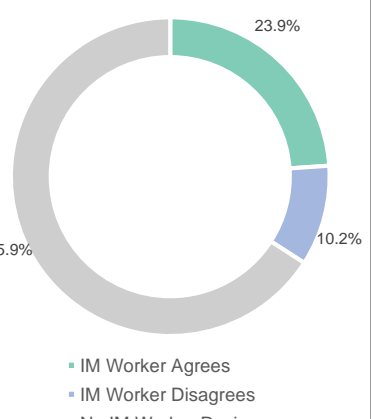
### Days Spent



### Corrective Actions Needed



### IM Worker Agreement



**GLOBAL FILTERS**  
RESET

**Start Date** 1/1/2022 **End Date** 12/31/2022

**Time Range**

- All Available Data
- Last 12 Months
- Last 6 Months

**Consortium**  
All

**Agency of Administration**  
All

**Team**  
All

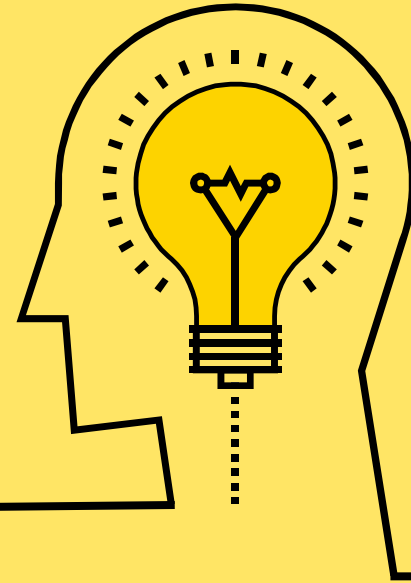
**IM Worker**  
All

**PCR Reviewer**  
All

**Work Item Type**  
All



# PCR Sample Criteria Effectiveness Dashboard





85.3%  
Error Relevancy

71.2%  
Sample Criteria Effectiveness

9.3%  
Other Errors

790  
Eligible Cases Skipping Review

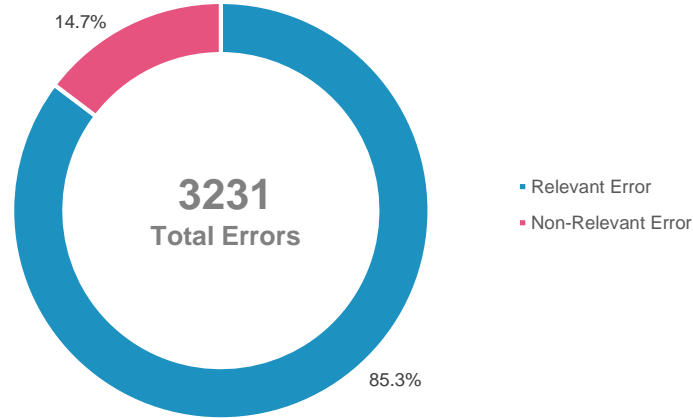
89  
Review Not Resolved

\$3000  
Over Allotment

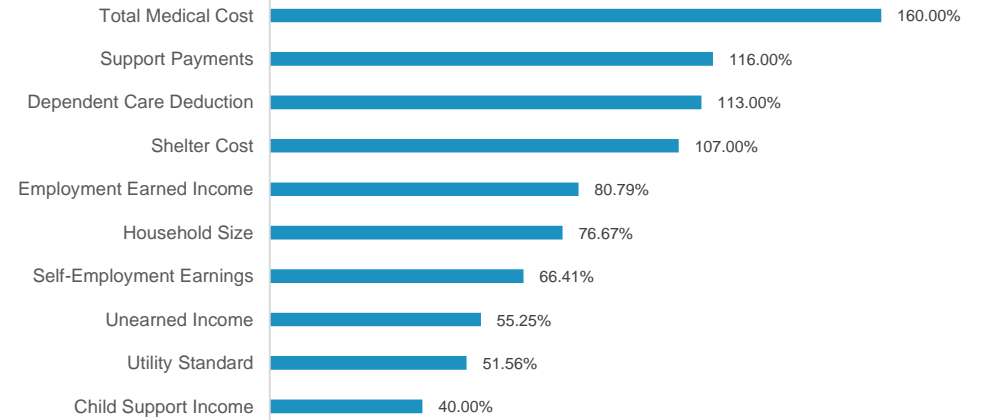
\$500  
Under Allotment

## Error Relevancy to Sample Criteria

Summary

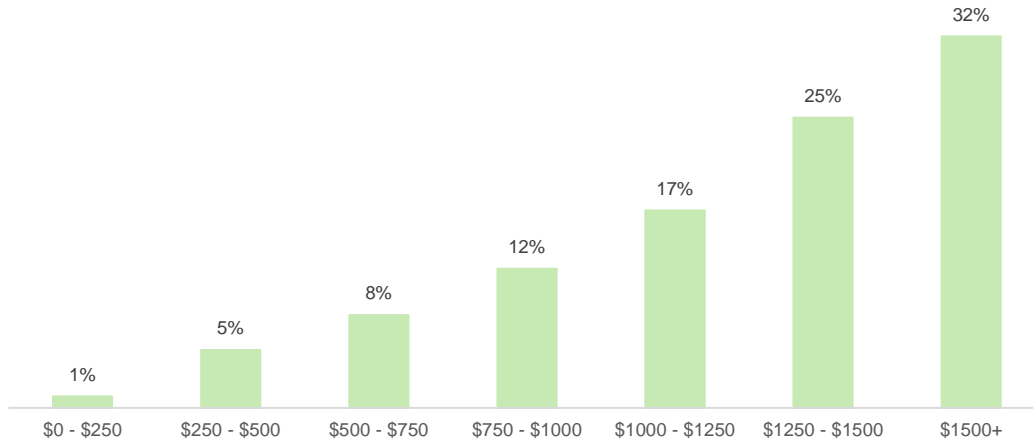


## Sample Criteria Effectiveness



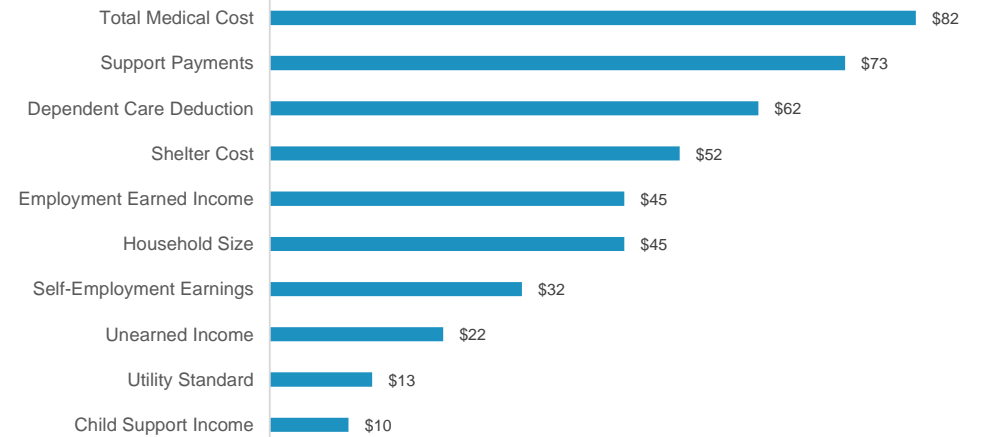
## Sample Criteria Error Rate

Countable Gross Income



## Allotment Variance

Average  Total



IM MANAGEMENT REPORTS

GLOBAL FILTERS  
RESET

Start Date: 1/1/2022  
End Date: 12/31/2022

Time Range  
All Available Data  
Last 12 Months  
Last 6 Months

Consortium: All

Agency of Administration: All

Work Item Type: All