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INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

April 20, 2023

1:00 – 3:30 p.m.

Zoom Link: <https://dhs.wi.zoomgov.com/j/1605652920?pwd=emhLcklIMi83RmlpdW0vcjR1WHBtZz09>

For audio dial: 1-669-254-5252 **Meeting ID:** 160 565 2920

Time	Topic	Presenter(s)
1:00 – 1:05 PM	Administrative Updates	Katie Sepnieski/Lorie Graff
1:05 – 1:10 PM	Approval of March 16, 2023, Meeting Minutes (Attachment)	Katie Sepnieski
1:10 – 1:45 PM	Department of Health Services Policy Updates	DHS Policy
1:45 – 2:45 PM	CARES Releases (Attachments)	DHS Policy
2:45 – 3:00 PM	Subcommittee Updates (Attachment) <ul style="list-style-type: none">a. Income Maintenance Operational Analysisb. Performance Monitoringc. Call Center Technical/Operationald. Training (no updates)e. Fraud & Program Integrity (no updates)f. Elderly, Blind, Disabled/Long Term Care (no updates)	Lorie Graff Ann Kriegel Kris Weden
3:00 – 3:05 PM	Income Maintenance (IM) Funding and Contract Updates	Alicia Grulke/Lorie Graff
3:05 – 3:10 PM	Consortia Feedback: IM consortia will share feedback with DHS	Lorie Graff
3:10 – 3:15 PM	Administrative Memos	Alicia Grulke/Lorie Graff
3:15 – 3:20 PM	Regional Enrollment Network	Lorie Graff
3:20 – 3:25 PM	Public Comment	All
3:25 – 3:30 PM	Announcements/Future Agenda Items	All

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Income Maintenance Subcommittee Key Messages
IMOA
Thursday, April 13, 2023

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline
DHS Policy/COVID-19 Updates	<p><i>Diversity, Equity & Inclusion Workgroup Participants:</i> DHS is seeking 6 consortia reps for the workgroup. Alicia will send out an email with details on time commitment and a request for volunteers.</p> <p><i>QC Reminder:</i> In 2022, federal regulations changed around expired certification periods. If a case that's QC'd is in a 13th or 14th month certification period, they are not eligible due to the expired certification period. Most of these cases are exceptioning out at renewal, and a 349 alert is issued. It's important that staff act on 349 alerts. There is a Control D report to identify these alerts and Process Help to guide staff in taking appropriate case action. This may also happen if a worker runs a case and the cert period is inadvertently pushed out, so staff should watch for this as well. The QC Newsletter that went out today includes a reminder for staff as well.</p> <p><i>Unwinding – Mail:</i> DHS is in the process of sending the iC only notices. They will have updated counts by county on 4/21/23.</p> <p><i>National Change of Address (NCOA):</i> DHS is working on plans for the NCOA address database check, targeting 5/6/23 for implementation. Case comments will be added when an address is found for MA cases. Auto updates can't be done for other programs (FS, CC) or when an MA case also include FS and/or CC. There's also no automated update if the address is out of state. They are working on an alert to be available with the June CARES release that will notify the worker that there's new address information. The NCOA check should reduce the amount of follow up that will be needed.</p> <p><i>Returned Mail:</i> If a text and email is sent to a member when their renewal is sent, this counts towards the CMS requirement that we reach out using more than one modality in response to returned mail (related to a renewal). If a worker sees that a member has an email and a cell phone number on their case, the worker will not be required to make a follow up phone call to the member. Only about 1/3 of cases have an email address listed though. DHS will be communicating clearer details in a CCN once everything is finalized.</p> <p><i>Prevention of Auto Closures:</i> If a member submits a renewal before Adverse Action, but the case has not been confirmed, the member's eligibility will be automatically extended through the end of the following month. No termination notice will be mailed to the member, and case comments will be entered. Provided the renewal is submitted in a manner that creates a work item, the system will know to extend the eligibility. The work item itself will not be pushed out, which is how workers will know this is a renewal for that month. If a renewal is submitted after Adverse Action, no automatic extension of eligibility will be granted.</p>	IMOA Members	On-Going

	<p><i>Katie Beckett Unwinding Update:</i> Kelsey Vincent/Bureau of Children’s Services Renewals will be scheduled between June 2023 and May 2024. Notices were sent to members in March. Any member that turned 19 during the PHE, or turns 19 by September 2023, will be disenrolled by 10/1/23. They received a letter in mid-March that encouraged them to look for other health care and provided resources. IM agencies may receive early applications (before they lose Katie Beckett eligibility) and these should be processed. It’s perfectly ok for someone to have both MA in Cares and Katie Beckett. It is duplicative, but it’s the best course given the limitations of the systems. DHS will send out a copy of the letters that were mailed to Katie Beckett members. DHS will also work on developing written guidance for consortia on how to approach processing these cases, since there were several questions presented by consortia (example: what if there’s a cost share with the other coverage option?).</p> <p>Members with questions can be directed to 1-866-786-3246 or DHSKatieBeckett@dhs.wisconsin.gov</p> <p><i>Food Share Emergency Allotments:</i> The 4/8 EA catchup issuance for February was the last one. Cares functionality will be updated May 1st. Workers must have a security level of 75 or above to issue EA supplements for errors within the last 12 months.</p> <p><i>Drug Testing:</i> Memo will be issued on 4/28. Process Help will be updated at the end of May/early June. System changes are being made to support policy (alert to pend when an individual agrees to take a test, recognize and alert a worker when the worker needs to take action). Several questions were submitted to PRT that can’t be answered until the policies are finalized. Consortia reps expressed concern because of need to ensure vendor can meet requirements and a contract is in place when requirements go into effect. DHS will work to clarify where they can, but also acknowledged that there will be situations/exceptions that they need to consult FNS on.</p> <p><i>Student Exemptions:</i> System is being updated to support ending of the student eligibility exemptions (6/12 for new applicants and at next renewal beginning in July 2023 for existing members).</p> <p><i>Unwinding Flexibilities:</i> Working on details for the Food Share Interview waiver. More details will be shared at May meetings. DHS submitted telephonic signature waiver, which would extend the current policy through May 2024.</p> <p><i>ABAWD Time Limited Benefits Reinstatement:</i> With the end of the PHE, anticipated end date of the ABAWD Time Limited Benefits waiver is June 30, 2023. DHS is committed to ensuring customers and consortia have all the information they need to transition back to regular policy. DHS will use a waiver for impacted individuals through September 2023. Impacted new applicants will be required to meet work requirements beginning October 1, 2023. Existing members will be subject to requirements at their next renewal or SMRF, beginning September 2023. Cares is being updated to support DHS planned exemptions, so there’s not manual processing that will be required. DHS plans to share this update with partners in upcoming meetings.</p> <p><i>P-EBT:</i> School aged children are only eligible for absences prior to May 11, 2023. For pre-6, home schooled, and virtual,</p>		
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	<p>their May benefits will be prorated. The DHS website has been updated to reflect the changes. WI will issue \$40 per month (\$120 total) to each eligible child for Summer P-EBT. The one-time lump sum will be issued in June 2023. Only school aged children are eligible for Summer P-EBT. Students must also be enrolled in free/reduced lunch, with eligibility determined by 6/3/23 to be eligible for Summer P-EBT.</p> <p><i>Process Help & Temporary COVID Policies/Processes:</i> The policies and processes communicated through CCN's will be put into the Temporary COVID Process section of Process Help the Monday after a CCN is sent out.</p> <p><i>Handbook Updates:</i> Food Share, Medicaid and BC+ handbook updates will be published by the end of next week. DHS reviewed the updates, and a summary of updates for each handbook was emailed to IMOA members. See emailed summaries for details.</p> <p><i>DHA Update:</i> DHA will not be attending IMOA. DHS followed up on some of the questions and concerns that were expressed by IMOA members at the last meeting. Hearings can be pushed out beyond required timeframes if a participant agrees to the extension. Consortia feedback is that it's not very feasible that a participant will agree to giving up their right to a timely hearing because the agency isn't prepared.</p>		
COVID Unwinding Task Force Updates	<p>A power point and notes from the last meeting were sent out by Masiel. Unwinding updates were shared, including information on the renewal notices being sent. Covering Wisconsin provided an update on the resources and trainings they have developed, including Access training and a renewal desk aid for community partners. An update similar to the one today was provided on the Katie Beckett unwinding plans. DHS shared updates to their unwinding toolkit, which includes social media publications that can be used by partners. An update was also provided on unwinding prep by DHS and consortia (LTE's, virtual training modules).</p>	IMOA Members	On-Going
Overpayments	<p><i>MA Overpayments:</i> Op Memo 23-10 was published, with effective date 4/1/23. A reference to the FAQ that led to DHS suspending MA overpayments was provided again- COVID-19 Public Health Emergency Unwinding FAQs (medicaid.gov) Question 31 DHS is still exploring options for how to handle claims that were established prior to the PHE.</p> <p><i>Administrative Disqualification Hearing Waiver & Forms:</i> Concerns were raised by partners over equitable use of the ADH waiver and protection of members' rights. As a result of concerns, DHS is pulling the use of the waiver and the ADH waiver form. The guidance is effective the date that the Op Memo is published, with the following exception- if a signed ADH waiver form is received before May 1, 2023, it can be considered valid. To pursue an IPV, agencies will need to complete the ADH or prosecution. Question was raised whether this will increase hearings. Yes, but agencies won't be completing MA overpayment hearings.</p> <p>In addition to the ADH waiver policy change, the memo next week will cover a range of topics related to fraud and overpayments (how to determine and substantiate IPV's, timing requirements for hearings and notices, hearsay clarification and guidance, referring suspected retail fraud etc.). Much of the information isn't new, but to provide clarification and additional guidance. Goal is to also incorporate some of the information into Process Help.</p>	IMOA Members	On-Going

Vault Card Discussion	<p><i>Feedback on the 3 questions DHS provided prior to the meeting –</i></p> <p>1. Agencies would be required to offer vault cards to members who qualify for expedited benefits either on the same day or next business day on which the member is determined eligible.</p> <ul style="list-style-type: none"> • Question: If we change a participant’s address and issue a vault card the same day, will the permanent card be sent to the correct address? • If we issue a vault card the following day to a new participant, the permanent card has already been issued and mailed to the participant. This can cause confusion. <p>2. A “separation of duties” would be required – meaning that the same worker who determined an individual’s eligibility for benefits would <u>not</u> be able to also issue that member a vault card. A different worker would have to handle the vault card issuance process for that member.</p> <ul style="list-style-type: none"> • Small agencies have concerns because they have so few staff (the smallest may only have 1 worker). • Requested clarification of terms determination and issuance. Systematic issuance, giving the card to the participant. <p>3. The Temporary QUEST Card Issuance Checklist (F-02260) – now optional – would be enhanced and become a required part of the process of each vault card request/issuance.</p> <p>Relatedly, we are exploring making a portion of this form something the member has to complete/sign (i.e. providing their name, case information, reason for requesting a vault card, attestations), another portion that an agency worker has to complete/sign (i.e. verifying the eligibility for a vault card and other case-specific circumstances), and possibly a final component in which another/second worker must sign the form to verify that they witnessed the vault card being provided to the requesting member.</p> <ul style="list-style-type: none"> • Seems like another layer of red tape, delaying the ability to get the participant their card. • Could result in wasted trips to the office. • Most agencies already have a process to use the eligibility checklist to determine whether a participant is eligible for a card. This is entered into case comments, so clerical in the agency is aware that a participant is eligible for a vault card. Requiring the participant to fill out another form at the agency is duplicative or disrupts the consortium’s already established processes and checks and balances. • Consensus that second signature would delay the process even more for the participant. • Some small agencies don’t have many staff, so requiring two signatures would be difficult. • Question: Is there a requirement that the person picking up the card verifies their identity? What if a social worker that’s assisting a participant wants to pick up the card? There’s no specific policy that seems to allow that. Allowing this makes a lot of sense in supporting the participant. • If a signature is needed from the participant, can there be an electronic signature that’s taken by the worker that determines whether the participant is eligible for a vault card? What’s the purpose of the signature (attest to reason for needed card or to pick up the card?) 	IMOA Members	On-Going
Pre-Discharge Application Discussion	<p><i>Feedback on the 3 questions DHS provided before the meeting:</i></p> <p>1. Do agencies identify any barriers or concerns around implementing a pre-discharge application process for the ~1,000 individuals statewide who leave state facilities in a given year?</p> <ul style="list-style-type: none"> • Dane County: Many of the applications are completed by admins at the facility with little information provided on the application. It’s currently time consuming for the worker to reach out to get information. We support a process that would improve our current experience. 	IMOA Members	Ongoing

	<p>Clarification: Intent is telephonic applications would be submitted to the county where individual intends to live. Individual would need to be competent and participate in application process.</p> <ul style="list-style-type: none"> • Agree this process would support setting individuals up for success in leaving institution (ability to get needed medications etc.). • Having a point person within consortium might be helpful. Setting up like process for inmates would be ideal. <p>2. Are any agencies already using a pre-discharge process for people leaving state facilities, and if so, any advice or lessons learned?</p> <ul style="list-style-type: none"> • See above. It's mostly impacting counties where the institutions are located, and mail-ins are submitted. <p>3. DHS would like to implement relatively soon, to extend the benefit of pre-discharge applications to members – but are aware of the conflict with the start of unwinding. Do agencies have a preference between implementing early summer – meaning as early as next month – vs. August, or somewhere in between?</p> <ul style="list-style-type: none"> • Majority prefer implementation in the Fall given the unwinding workload. Some stated if the process is the same as the process for inmates, they think this will be easy to implement. 		
Genesys Update	<p>DHS is working on finalizing the list of enhancements and identifying funds to include everything that was prioritized.</p> <p>Updated Genesys messaging will be coming out to reflect most current unwinding priorities.</p> <p>High call volume message will be updated to remind customers of the call back option.</p> <p>Watching call volume next week as iC notices will be hitting member's mailboxes.</p>	IMOA Members	Ongoing
Roundtable Discussion: Unwinding Planning	<p><i>ARPA Contract Amendments:</i></p> <p>They are being finalized and Jonelle will email when they are loaded and ready to be signed by consortia.</p> <p><i>LTE Updates:</i></p> <p>36 LTE's were hired, and they have been in different training cohorts. 17 have completed training, are assisting MILES and available to consortia upon request. 5 are bilingual in Spanish. 1 is bilingual in Hmong. DHS is looking at potentially adding another 30 to the LTE pool. They have been transitioning staff from the COVID response team and P-EBT team.</p> <p><i>Unwinding Coordinators Update:</i></p> <p>Reminder that consortia do not have to wait until their monthly meetings with Alicia or Elizabeth to request assistance from the LTE's. A request can be emailed any time.</p>	IMOA Members	Ongoing
Future Agenda Items/Next Meeting Date	Next meeting - 5/11/23, 1pm-4pm		
Cross Departmental Updates (Attachment Only)			

Income Maintenance Subcommittee Key Messages
Performance Monitoring Subcommittee
March 15, 2023

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To
Recap of Jan 2023 meeting	Shared favorable QC results Consortia reports Unwinding efficiency and strategies		Ashley Schabel
Consortia Assignment Highlight a report that you are using	Nicole shared the SMRF report from WEBI/IMMR and shared how IM Central uses it. She checks it weekly to determine why some are untimely to correct prior to end of month.		Nicole Rolain
Recent policy check-in: <ul style="list-style-type: none"> • 20-day verification • Application processing after April 1st • Other policy and cares updates 	Extend 10 days for FS not 20- Early HC renewals that we cannot reach		Ann Kriegel
Consortia Report	For the first time in many months there was a slight decrease in caseload for most consortia. Metrics look good. Everything timely. Call center jump in decrease in ASA. FS only one month of FFY 2023 so no new data on the reports yet.		Donna King
Roundtable shelter and utilities -10 min breakout -10 min discussion	<ul style="list-style-type: none"> • 2nd most common error area after wages. Discuss in small groups strategies to improve and then discuss together. Some ideas shared: • Sharing information with Section 8 • Using matching address button • Critical interviewing skills • Error prone profiles • Can anything be weaved into the NW training? life knowledge? The importance of asking certain questions and the impact it has. • Capital uses a template for new workers. • HHC changes which can change rent obligations • Look at shelter and utility “exceeds income” report • Finding out the amounts of housing assistance they are receiving instead of just putting it in there. Asking about pet fees, garage fees, etc. • Reliability of data exchange for WHEAP • Address match to determine how many people • Self-employment double dipping 		Nicole Rolain
FSQC Error Findings	<ul style="list-style-type: none"> • FFY 2022 oct 21-sep 22 overall 4.39% for year-end=great • Wages and salaries 53% • Shelter/utility 19% • Negative 2022 finished 28.38% which is good 		Dione Sanders

	<ul style="list-style-type: none"> • Top=verification, then notices, wages and salaries and applications • FFY 2023 10/22 only so far 8.7% wages and salary and shelter and deductions (both client-caused) top two • Negative for Oct 2022 20.69 % • Verification-improper denial prior to due date-sometimes because of another program or verification received but not entered. 		
Potential PCR Tool Enhancement	<ul style="list-style-type: none"> • In the fall requested enhancements to PCR tool based on feedback from users. DHS is prioritizing projects right now. Shared requested enhancements. • Give reviewers ability to assign reviews to self • New review status-so as not to impact timeliness • Include immigration and school enrollment pages n drive flow • Change and/or function to enable EBD cases to be pulled more easily • Residential county name on review search results page. • Real time criteria changes-so if criteria is changed during the day, it will update right away. It will have an impact on the criteria effectiveness report. • The group indicated functionality of tool is more important than reporting at this time. 		Lisa Hanson and LaTanya Baldwin
Importance of Alert processing	<p>FSQC look at certification periods a little differently. Old guidance-HH must not be considered solely due to expired cert period. new guidance is they must be considered ineligible solely due to expired cert period. FSQC is finding workers not working 349 Alerts-Elig needs to be run because they were exceptioned off at mass change. Make case comment on action taken on alert. Training has an alerts desk aid. Help text and purpose of alerts. CWW can look up alerts with alert code. Ignoring the 349 Alert can cause huge errors. 349 alert is generated weekly-at some point it goes to supervisor. Anyone have a desk aid to share? reminder will be in QC newsletter</p>		Ashley Schabel
Loss of contact QC reminder	<ul style="list-style-type: none"> • Once the clients contact the agency the cases should be re-opened vs refusal to cooperate • Remind staff-will be in QC newsletter 		Lisa Hanson
Future Agenda items			Molly Thomas

Income Maintenance Subcommittee Key Messages
Call Center Operational Technical Subcommittee
March 13, 2023

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To
Enhancements	<ul style="list-style-type: none"> • In progress - Ability to see wait times by call per queue per day of the week or week of month. • Correct ATS functionality to minimize time dedicated to working mis-match reports. Root cause issues need to be resolved. This will be explored concurrent with reimagination of ATS exploration. • Update time in status for each change in status to allow supervisors the ability to see how long agents are in aftercall, lunch, breaks or other processing statuses. This information is available via the “Current Times” widget. • Callback implementation completed for Northern, Great Rivers, IM Central and Moraine Lakes consortia on 3/9/23. Southern, Capital, Western and WKRP scheduled to transition to callback on 3/23/23. 		
Outages	March 7 & 8, 2023. Real Time Reporting unstable. Caused users to be logged out. Outage duration approximately 30 minutes. Resolved after update to Config Servers.		
Focal Topic: Displaying Call Center Queue Statistics to Agents	<ul style="list-style-type: none"> • Hopefully update can be completed within 30 days. • Agents will be able to see statistics for all queues within their call center, not just the queues the agent is assigned to. Agent will see: <ul style="list-style-type: none"> - Oldest Call Waiting (maximum waiting time for calls currently in queues). - Average Wait Time (average amount of time call waits in each queue). - Calls in queue (number of calls currently waiting in each queue). • Consortia may opt out of showing statistics to their agents. 		
Next Meeting	Monday, March 27, 2023 @ 1:00 pm Contact Information: DHSGenesysCloudProject@dhs.wisconsin.gov		

Income Maintenance Subcommittee Key Messages
Call Center Operational Technical Subcommittee
March 27, 2023

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To
Recent Change Implementations	<p>The following changes/updates have been made specific to consortia needs:</p> <ul style="list-style-type: none"> • Queue prioritizations • Removal of voicemail option • Callback code updated for MilES • Callback Phase 4 extended to other Lines of Business (LOB) on 3/27/23 • Callback implemented for Southern, Capital, Western and WKRP on 3/23/23 		
Outages and Issues	<ul style="list-style-type: none"> • Vendor continues to work to aggregate data on time zone for historical reporting. • 3/16/23 contact server outage affected interaction history access. Issue was resolved by 9:30 a.m. same day. Server upgraded on 3/21/23 to avoid recurrence. 		
Callback Issues	<ul style="list-style-type: none"> • Currently testing solution for offline wait time reporting issue. • New callback build going into production on 3/28/23 to correct reporting issues on unknown queue assignments and inflated cancelled percentages. • Currently working with vendor to determine best calculation service for estimated wait time discrepancy (customer notification verses threshold) and place in queue. 		
Next meeting	<p>Monday, April 10, 2023 @ 1:00 p.m.</p> <p>Contact Information: DHSGenesysCloudProject@dhs.wisconsin.gov</p>		

Income Maintenance Subcommittee Key Messages
Call Center Operational Technical Subcommittee
April 10, 2023

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To
Recent Change Implementations	<ul style="list-style-type: none"> Normalized service for estimated wait time (EWT) for announcements, threshold, and reporting. Central Time Zone has been updated for historical reporting back to February 2022. 		
Outages and Issues	<ul style="list-style-type: none"> The state email system is intermittently blocking Genesys Reporting arriving as emails. Currently affecting state LOB's. 		
Enhancements and Updates	<ul style="list-style-type: none"> The project team will be reaching out to individual LOBs to determine scope of enhancement request to enable Genesys to look for the highest skilled agent. New videos will be added to the User Guide at the end of June. <ul style="list-style-type: none"> - Agent: 3.1 – Agent Desktop Workspace - Agent: 3.2 – Connect View Tab - Agent: 4.0 – Setting a Status - Supervisors: 7.2.2 – Explore Tab: Searching for and Listening to Calls - General: 11.6 – Submitting a Genesys Support Ticket 		
Focal Topic	<p>Removing Selectable Statuses: An enhancement was requested to remove “After Call Work (ACW) as a selectable status for agents. Agents will still be placed in ACW for 20 seconds by the system and will still be able to select “Not Ready-Extended After Call Work”.</p> <p>The Genesys Project Team is also looking for feedback on the removal of the following selectable statuses:</p> <ul style="list-style-type: none"> Not Ready (No Reason Code) Not Ready-No Answer Not Ready-Login <p>Agents would still be placed in the above status by the system under for following circumstances:</p> <ul style="list-style-type: none"> Not Ready (No Reason Code) – Genesys is unable to reach the agent's phone. Not Ready-No Answer – Agent does not answer a call offered to them. Not Ready-Login – Immediately after logging into the system. 		
Next Meeting	<p>Monday, April 24, 2023 @ 1:00 pm</p> <p>Contact Information: DHSGenesysCloudProject@dhs.wisconsin.gov</p>		