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**INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)**

**October 19, 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	Welcome	Katie Sepnieski/Lorie Graff
1:05 – 1:10 PM	Administrative Updates	Katie Sepnieski
1:10 – 1:15 PM	Approval of Sept. 21, 2023, Meeting Minutes (Attachment)	Katie Sepnieski
1:15 – 2:00 PM	Department of Health Services Policy Updates	DHS Policy
2:00 – 2:15 PM	Benefit Recovery and Investigation Tracking System (BRITS) Update	Tom Melms
2:15 – 2:35 PM	Subcommittee Updates (Attachment) <ul style="list-style-type: none"><li>a. Income Maintenance Operational Analysis</li><li>b. Call Center Technical/Operational</li><li>c. Performance Monitoring</li><li>d. Elderly, Blind, Disabled/Long Term Care (attachment only)</li><li>e. Fraud &amp; Program Integrity (not presenting)</li><li>f. Training (not presenting)</li></ul>	Lorie Graff Kris Weden Nicole Rolain
2:35 – 2:50 PM	CARES Release <ul style="list-style-type: none"><li>• 12-month continuous coverage for kids (effective January 1, 2024)</li></ul>	Nicole Huffman /Suzanne Cone
2:50 – 2:55 PM	Income Maintenance (IM) Funding and Contract Updates	Alicia Grulke/Lorie Graff
2:55 – 3:00 PM	Consortia Feedback: IM consortia will share feedback with DHS	Lorie Graff
3:00 – 3:05 PM	Administrative Memos	Alicia Grulke/Lorie Graff
3:05 – 3:10 PM	Regional Enrollment Network	Lorie Graff
3:10 – 3:15 PM	Public Comment	All

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\*If you want to participate by web meeting, you can follow along at your computer by logging in as a guest to <https://dhs.wi.zoomgov.com/j/1619409056> 5 minutes ahead of time.

**Income Maintenance Subcommittee Key Messages**  
**IMOA**  
**Friday, October 6, 2023**

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
DHS Policy/COVID-19 Updates	<p>DHS Staffing Update-  Stephanie Sisk has been hired to replace Manee Hang on the PRT team. It was previously announced that Manee Hang was hired to fill the PRT supervisor position. Latonya will be recruiting to fill Stephanie's position on the State's QC team.</p> <p>Medicaid Updates-</p> <ul style="list-style-type: none"> <li>DHS continues to work on the state's admin renewal policy to comply with recent guidance from CMS. A process has been established to extend MA for around 2,000 MA members, and a long-term systematic fix is being worked on to ensure WI complies with CMS guidance that eligibility be applied on an individual basis instead of household. An Op Memo will be released in November.</li> <li>DHS is still waiting for CMS guidance on how premiums intersect with the continuous coverage policy for children. An Op Memo and letters to households regarding the reinstatement of premiums will be issued in November.</li> <li>DHS will be issuing a CCN related to Foster Care MA as there are several upcoming processing situations related to these members. A handful of Foster Care MA individuals that were part of a CWW case with continuous eligibility had their eligibility ended when they left the home. If agencies receive an application, they should add them back to the case. The CCN will contain more details on these case situations.</li> </ul> <p>Food Share Updates-</p> <ul style="list-style-type: none"> <li>There was an issue with budget and allotments for Transitional Food Share cases as of October 1<sup>st</sup>. When first going to TFS, the system is counting the W2 payment instead of the correct household income for some TFS members. DHS is working on communication and reports that will be sent to consortia for cases that need to be corrected due to an under-issuance of Food Share benefits. A system fix is planned for 10/21.</li> </ul>	IMOA Members	On-Going	

	<ul style="list-style-type: none"> <li>• DHS has some left over Food Share Medical Expense publications from the mass mailing they did earlier this year. If consortia are interested in a supply of physical copies, please reach out to Alicia.</li> <li>• The new Food Share Temporary Card policy changes were reviewed (power point). <ul style="list-style-type: none"> <li>- Op Memo will be issued 10/20.</li> <li>- New policy is effective 12/1.</li> <li>- Food Share handbook and Process Help will be updated 12/18.</li> <li>- There will be 5 key requirements: <ol style="list-style-type: none"> <li>1. All agencies must issue/offer temporary quest cards.</li> <li>2. The worker issuing temporary card must not be the same worker that last confirmed the case.</li> <li>3. The worker must tell the member that they can get a temporary card the same day or next day if they don't have access to a permanent quest card.</li> <li>4. F-02260A Temporary Quest Card Request from must be completed by the card requestor, which will collect the official request for a card and document that the member is agreeing to the temporary quest card rules.</li> <li>5. F-02260 Temporary Quest Card Issuance form is required to be completed by the worker. This includes verifying requestor identify and supports the policy/qualifying reason for issuing a temporary card. This form already exists for optional use by agencies, but it is being updated and will now be required to be completed.</li> </ol> </li> <li>- There is a limit of one quest card issuance every 12 months unless the member qualifies for an exception-expedited eligibility and extenuating circumstances.</li> <li>- The Food Share member should not leave the office before their card is pinned. DHS prefers the member be assisted by phone and is aware that not all agencies have a POS machine.</li> <li>- DHS will send out the draft policy so consortia have an opportunity to review it before the November IMOA meeting. This will be on the agenda for November so consortia can further discuss any operational changes that will need to be made.</li> </ul> </li> <li>• Work requirements – reminder to screen for exemptions at application and renewal and ask about hours that count</li> </ul>			
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	<p>towards work requirements. Ref. Food Share handbook 3.17.1.2.1</p> <ul style="list-style-type: none"> <li>WI received approval for an ABAWD Geographic Waiver, which exempts individuals in areas that are experiencing high unemployment or low number of jobs. The waiver includes the City of Milwaukee, City of Racine, 4 counties and 10 tribes. Any TLB's already issued will be adjusted and the system will be updated on or before 10/21.</li> </ul>			
Unwinding Planning	<p>All state LTE positions are filled, with the exception of one individual that recently resigned. Bay Lake, Western and Moraine Lakes took on LTE's that started VILT in October.</p> <p>All consortia performance metrics look good. The statewide ASA improved by 1 minute from August to September. The late renewal processing data shows it's due to late submissions.</p>	IMOA Members	On-Going	
Genesys Update	<p>The 10/2 Genesys Historical Reporting issue was related to licensing and was resolved that afternoon. There has been a recent rise in reported telecom issues (calls not ringing to agents, unexpected disconnects, audio quality). Evidence has not supported the platform as the root cause. Other causes – state long distance carrier routing issues, local carrier, local telecom system or network issues.</p> <p>New 'Technical' Emergency Flag has been set up as of 9/5/23. Any agent who needs to be able to retrieve these messages must be assigned to a specific group.</p> <p>User Guide update planned for 11/10/23.</p> <p>If a consortium is closing for training, Genesys needs to know at least two days ahead of time (prefer one week notice).</p> <p>Will be receiving a form to review related to holidays as DHS had some incorrect dates.</p>	IMOA Members	On-Going	
Security Update	<p>A new staff person, Julie Larson, started within the last couple of months. The Security team is now fully staffed.</p> <p>Security audit reports are currently going out to Security Officers and Consortia Leads. Reminder that access can be removed using the report form, but any new requests or request for increased systems access must be submitted separately following the usual</p>	IMOA Members	On-going	

	access request process. Reach out to Carla if you identify any errors in the report. Western reported an issue this morning related to an IMMR report referenced in the report, so the Security team is reviewing this.			
Heating Season Updates	<p>Jane Blank provided a WHEAP heating season update. Four counties opted out of administering WHEAP for this fiscal year- Brown, Manitowoc, Ozaukee, and Marquette.</p> <p>While the federal 45 day continuing resolution was passed, DOA is unable to issue any benefit payments until they receive the annual award letter. They expect the award letter by the end of October. The funding level for LIHEAP is lower this year(\$2B), which takes us back to pre-covid levels. Since the federal award letter typically includes 90% of the funding for the heating season, even if the 45- day continuing resolution expires without anything else passed. the WHEAP program will have funding to continue.</p>	IMOA Members	Annual Update	
Walk-On Item	The Worker Productivity Dashboard is now functional and consortia that have used it believe it is going to be a very helpful tool. DHS asked consortia to send in the names of all supervisors that they want to have access to the dashboard.	IMOA Members		
Future Agenda Items/Next Meeting Date		IMOA Members/DHS Staff	<i>November 3, 2023</i>	

**Income Maintenance Subcommittee Key Messages**  
**Call Center Operational Technical Subcommittee**  
**October 9, 2023**

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Outages and Known Issues	<ul style="list-style-type: none"> <li>10/2/23 outage with Historical Reporting. Licensing issue that caused users to receive an error when attempting to log in. The issue was resolved by noon on the same day.</li> <li>We are seeing a rise in reported telecom issues. Evidence has not supported that this is a root cause issue with the platform. Issues could be related to local carriers, telecom system or network issues, or a routing issue with the state long distance carrier.</li> </ul>		RCA pending with provider	
Enhancements	<ul style="list-style-type: none"> <li>New “<i>Technical</i>” Emergency Flag deployed for all consortia on 9/5/23.</li> <li>“<i>Technical</i>” Emergency Flag was created per request from DHS. This flag is to be used when Genesys is operational but closed by consortia especially during CARES/CWW outages.</li> <li>New flag will allow members to leave a voicemail message to set a “contact” date.</li> <li>Agents who need to retrieve messages from the new emergency flag must be assigned to the <b><i>consortia name_Technical_withVM_AG</i></b> agent group. Information on how to add these agents can be found in the Genesys User Guide 8.1.5 <i>Adding an Agent to an Agent Group</i>. Additional information on Emergency Flags can be found in the guide 8.2.2 <i>Emergency Flags</i>.</li> </ul>			
Updates to User Guide	<ul style="list-style-type: none"> <li>Update planned for 11/10/23 will include the following: <ul style="list-style-type: none"> <li>Monitor View Tab – update screenshots and section</li> <li>How to log an agent out of Agent Desktop</li> <li>Adding/Removing supervisors from Static Agent Group</li> <li>Quick Agent Search in Platform Administration</li> <li>Editing General Agent Information</li> <li>Queue Voicemail Counts</li> </ul> </li> </ul>			
Next Meeting	<p>Monday, October 30, 2023 @ 1:00 p.m.</p> <p>Contact Information:  <a href="mailto:DHSGenesysCloudProject@dhs.wisconsin.gov">DHSGenesysCloudProject@dhs.wisconsin.gov</a></p>			

**Income Maintenance Subcommittee Key Messages**  
**Performance Monitoring**  
**September 20, 2023**

<b>Agenda Item</b>	<b>Message/Action/Motion</b>	<b>Audience/Recipient</b>	<b>Assigned To</b>	<b>Deadline</b>
RECAP of July 2023 meeting	<ul style="list-style-type: none"> <li>• PAR Results</li> <li>• Operations Dashboard</li> <li>• SMRF Timeliness recommendation to IMOA</li> <li>• FSQC Error Findings</li> <li>• Transfer Protocol &amp; Issuing QUEST cards</li> <li>• MEQC process, simple comments</li> <li>• FDSH project results-QC newsletter</li> </ul>	PM subcommittee	Molly Thomas	n/a
Consortia Assignment-Report Review	<ul style="list-style-type: none"> <li>• New QC coordinator Alexia (Lexi) Hamilton replaces Allan.</li> <li>• Mich Brownlow HC team supervisor in MEQC unit is retiring.</li> <li>• Items previously sent to Mich for perm or MEQC to LaTanya at <a href="mailto:latanya.Baldwin@dhs.wisconsin.gov">latanya.Baldwin@dhs.wisconsin.gov</a></li> </ul>	PM subcommittee	LaTanya Baldwin-not present; Ashely Schabel	n/a
Recent Policy check in	<ul style="list-style-type: none"> <li>• None</li> </ul>	PM subcommittee	Ann Kriegel	n/a
Consortia & PCR Tool Reports	<b>Monthly Consortia Report</b> <ul style="list-style-type: none"> <li>• Error on Bay Lake FSQC rates for CAPERS-corrected version posted this morning</li> <li>• Let Donna know if you have any questions</li> </ul>	PM subcommittee	Donna King	n/a
FSQC Error Findings	<ul style="list-style-type: none"> <li>• Active errors 10/22-4/23 5.2% Cumulative</li> <li>• Wages/Salaries 30.19%               <ol style="list-style-type: none"> <li>1. Arithmetic</li> <li>2. Not reported</li> </ol> </li> <li>• Shelter/Utility 20.75%               <ol style="list-style-type: none"> <li>1. Incorrectly reported</li> <li>2. HH comp 7.55%                   <ol style="list-style-type: none"> <li>a. Incorrect policy</li> <li>b. Incorrectly reported</li> </ol> </li> </ol> </li> <li>• Negative errors 17.69%               <ol style="list-style-type: none"> <li>1. Verifications 36.23%</li> <li>2. Notices 20.29%</li> <li>3. Wages and Salaries 17.39%</li> </ol> </li> </ul>	PM subcommittee	Dione Sanders	n/a

IMQA Eligibility Errors	<p>Eligibility errors were the same as previously reported to this group.</p> <p>Technical errors</p> <ol style="list-style-type: none"> <li>1. Citizenship- <ol style="list-style-type: none"> <li>a. BC not on file found BRQ</li> <li>b. SC code used but member not rec'd SSI</li> </ol> </li> <li>2. Identity verification</li> </ol> <p>Besides SC, other codes in CWW not found in ECF</p> <ol style="list-style-type: none"> <li>3. Generate Summary-not generated after application for renewal</li> <li>4. BC+ tax deductions on employment page-potential to turn into eligibility error; (significantly less of these errors compare to 1-3 in this section) <ol style="list-style-type: none"> <li>a. Not added</li> <li>b. Incorrect calculations</li> </ol> </li> <li>5. Shelter costs- expenses exceed income and not documentation of conversation of how meeting expenses- FSHB 4.6.7.1</li> </ol> <p><b>Expected annual Income page- Workers must update the annual amount manually in upper left corner of earned income of expected annual income for page to work and include amount.</b> The system uses monthly income first and if denied will use annual income page.</p> <ol style="list-style-type: none"> <li>1. Handout was sent with agenda with resources.</li> <li>2. CWW demo is very helpful as quick reference.</li> <li>3. Gap Filling training in IM Refreshers that is more extensive.</li> </ol> <p>HH reporting homelessness-not all HH getting updated to set certification periods correctly.</p> <ol style="list-style-type: none"> <li>1. Worker needs to manually update renewal date in a change prior to AA in month 4.</li> <li>2. Looking at potential system change. Checking on the correct month for the guidance.</li> </ol>	PM subcommittee	Ashley Schabel	n/a
Roundtable discussion and feedback sharing	<p><b>Roundtable-unwinding check in</b></p> <p><b>How is your consortia prioritizing workload?</b></p> <ul style="list-style-type: none"> <li>• <b>MILES</b>-increase in walk ins at end of day; increased staff on site at locations needed; phone volume very high.</li> </ul>		Ann Kriegel	



	<p>Added HPC and advanced staff to help; Split shifts-AM staff are processing 7-9. Thursday PM all process 12:30-end time. Work continues to come in-staff burning out from phones.</p> <ul style="list-style-type: none"> <li>• <b>Western</b>-Genesys, CWW issues improved is helpful; looking at what is due at the end of the day to catch any that due but didn't get done. Only Wed/Sat OT. Give docs to people when phones close at 4. Got 36 cases done! Early renewals causing hiccups; uptick in FS applications; <b>family team on phones all day on Mondays starting at 9 am-pull if call volume allows;</b> staff glad to see what is in the queues, specialized S/E staff (3)-slower if not as versed-been helpful as a strategy to make people available. If on phone-anyone processes-sends for a check by their PRS team. Drug tests-processing by same person to increase speed. <b>For morale-added sending out something fun and encouraging on Wednesdays.....</b></li> <li>• <b>Central</b>-phones insane, FS applications extremely high, seen burnout, staff leaving; half staff new since PHE, mandatory OT; DHS LTEs helping with renewals</li> <li>• <b>Capital</b>- Not changed much-few times to add staff to phones, turnover increasing-long time to get others trained. FS applications/caseload not gone down at all. Do we know why? Doing well on their caseload.</li> <li>• <b>East Central</b>-staff noted customers are just mean right now. Like a game of whack a mole.</li> </ul>			
Accomplishments & Goals	<p><b>Review charter for 2023 goals and accomplishments and look at what we want for upcoming goals.</b></p> <ol style="list-style-type: none"> <li>1. Identify, implement and share strategies to reduce errors <ol style="list-style-type: none"> <li>a. Roundtable and small group discussions</li> <li>b. Implemented initials for CWW enhancements</li> </ol> </li> <li>2. Evaluate performance standards <ol style="list-style-type: none"> <li>a. DHS shared data and reports</li> <li>b. IM shared strategies for utilizing reports</li> <li>c. Recommendation for SMRF timeliness benchmark</li> </ol> </li> <li>3. Collaborate, communicate, and propose impactful strategies and enhancements</li> </ol>	PM Subcommittee	Molly Thomas	n/a

	<ul style="list-style-type: none"> <li>a. Process Help update for uniform guidance on FDSH wages</li> <li>b. Collaborated with PRT on COVID unwinding policies, system changes and identifying workarounds</li> </ul> <p>4. Agency and DHS Continuous Improvement plans</p> <ul style="list-style-type: none"> <li>a. Enhancements to training curriculum and HB language</li> <li>b. Participated in Correspondence Improvement workgroups</li> <li>c. Shared Program Access Review results</li> </ul> <p><b>Thank you for all the work this subcommittee has done in 2023!</b></p> <p><b>What do we want for 2024 GOALS:</b></p> <ul style="list-style-type: none"> <li>• Add something for PCR tool</li> <li>• 2023 goals will be relevant in 2024, PRC tool might fit in #2</li> </ul>			
Future Agenda items	<ul style="list-style-type: none"> <li>• Walk on item-MER is done for 2023-will be confirming dates for 2024 and survey from 2023 to improve to 2024. Should be out soon possibly this week.</li> <li>• No other items noted for future agenda</li> </ul>	Consortia	Co-chairs	TBD

**Income Maintenance Subcommittee Key Messages**  
**EBD/LTC**  
**September 19, 2023**

<b>Agenda Item</b>	<b>Message/Action/Motion</b>	<b>Audience/Recipient</b>	<b>Assigned To</b>	<b>Deadline</b>
Presumptive Disability (F-10130)	Elisabeth explained there were some unintended consequences from last changes to the form. Some changes will be coming, will ask for volunteers to look over changes and provide feedback.	IM EBD workers	Elisabeth--- sent to ad hoc group who provided feedback	
Life Insurances	Potentially not counting correctly- more information coming regarding riders and additional paid up insurance. Alignment with Federal rules.	IM EBD workers	State	
Who can sign MA forms?	Advocates and ADRC having concerns, if HC POA is activated can't sign forms, can't name representative and potentially need to get legal guardian. Questions: incapacitated vs. incompetent and do we need second signature if someone else signs application or review in best interest of client. Send examples we are seeing to CARES Call Center.	IM EBD workers	State	
MEH Community wavier section	Reorganize- move out processes to Process Help, focus on IM role and include all forms etc. that are used.	IM EBD workers	Elisabeth—bring back changes to subcommittee	
Future	Availability of MA compliant annuities, Life estate content improved, Spousal assets- vehicles, and increase of home equity value needs to be increased, non-spousal family maintenance allowance.  Next meeting 12-05-23			