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## **INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)**

**February 15, 2024**

**1:00 – 3:30 p.m.**

**Zoom Link:** <https://dhs.wi.zoomgov.com/j/1604519247>

**Join by Phone:** 1-669-254-5252 | **Meeting ID:** 160 451 9247

<b>Time</b>	<b>Topic</b>	<b>Presenter(s)</b>
1:00 – 1:05 PM	Welcome	Katie Sepnieski/Lorie Graff
1:05 – 1:10 PM	Approval of January 18, 2024, Meeting Minutes (Attachment)	Katie Sepnieski
1:10 – 1:45 PM	Department of Health Services Policy Updates	DHS Policy
1:45 – 2:10 PM	Subcommittee Updates (Attachment) <ul style="list-style-type: none"><li>Income Maintenance Operational Analysis</li><li>Call Center Technical/Operational</li><li>Performance Monitoring</li><li>Elderly, Blind, Disabled/Long Term Care</li><li>Training</li><li>Fraud &amp; Program Integrity (not presenting)</li></ul>	Lorie Graff Kris Weden Nicole Rolain Kara Ponti/Ron Redell Shelby Jensen NA
2:10 – 2:25 PM	CARES Portfolio Update (Attachment)	Shine Baby
2:25 – 2:40 PM	CARES Update - Premium Changes for BadgerCare Plus Children (Attachment)	Nicole Huffman/Mai Yee Xiong/Suzanne Cone
2:40 – 2:55 PM	CARES Update - Removal of the Treatment Needs Question and Optional Health Survey (Attachment)	Suzanne Cone/Mai Yee Xiong
2:55 – 3:05 PM	Quality Control Annual Data	LaTanya Baldwin
3:05 – 3:10 PM	Income Maintenance (IM) Funding and Contract Updates	Alicia Grulke/Lorie Graff
3:10 – 3:15 PM	Consortia Feedback: IM consortia will share feedback with DHS	Lorie Graff
3:15 – 3:20 PM	Administrative Memos	Alicia Grulke/Lorie Graff
3:20 – 3:25 PM	Regional Enrollment Network	Lorie Graff
3:25 – 3:30 PM	Public Comment	All
3:30 PM	Announcements/Future Agenda Items	All

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**Income Maintenance Subcommittee Key Messages**  
**IMOA**  
**Friday, February 2, 2024**

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
DHS Policy/COVID-19 Updates DHS Staff	<p><b>2024 FSET Contracts- Cory Flynn</b>  11 contracts have been awarded. The only change is for Region 8. CW Solutions is the new vendor, taking over services from Workforce Solutions. Great Rivers and Western consortia are impacted by this change.</p> <p><b>Compromising Claims – Craig Hayes</b>  DHS received a number of policy questions after sharing the draft op memo on compromising claims. Craig provided some clarifications in response to the questions. The Department intends to release this in writing, but not immediately.</p> <ul style="list-style-type: none"> <li>• If a member becomes delinquent, will we be reinstating the full claim again?  There is no intent to readjust a compromised claim if a member becomes delinquent.</li> <li>• Assets: why/how was the \$100,000 benchmark chosen?  DHS received feedback/input from many stakeholders. Using all input, the \$100,000 benchmark was determined to be a reasonable amount.</li> <li>• Expenses: more definition on may be allowed vs must be allowed?  Any expense allowed for Food Share eligibility can be used along with most others that are reported and validated (medical expenses even for non-EBD members, monthly cost of transportation, monthly debt payments). There are some exceptions cited in the memo (example – streaming services costs).</li> <li>• Escalation review—are there timelines for requesting and responding to an escalation request? What is considered an official escalation request? Phone call, formal written request, specific form, etc. <ul style="list-style-type: none"> <li>a. What will the formal escalation review look like internally and at DHS?  The original decision should be within 30 days. If unhappy with decision and escalate to DHS we would hope this could all be resolved within 90 days. There may be exceptions based on circumstances.  An escalation request can be made verbally or in writing.  DHS is still working on an internal review process for escalations and will share as soon as details are available.</li> </ul> </li> <li>• Any concerns of people using this as a longer-term plan for failure to report changes?  The compromising claims policy does not impact other change reporting requirements or worker actions required.</li> </ul>			

	<ul style="list-style-type: none"> <li>Fair hearings—requesting better definition on that process. If a member requests, do we decline? Does DHA contact to say not fair hearable? Does the hearing still get held and then ALJ indicates it isn't a fair hearable decision? More details are being coordinated with DHA and will be shared as they become available.</li> <li>Clarification of household members. Food unit AG or all members in the home with income and assets? Compromising Claims policy follows Food Share rules for household. Everyone in the Food Unit is included and all of their income and assets even if they are normally excluded when determining Food Share eligibility.</li> <li>It says the Primary Requester is required to request Compromise. Who is the “Primary Requester”? The PP? Or can it be any of the liable individuals? Any liable individual.</li> <li>Is it possible that a “liable individual” is determined to no longer be liable but the \$ amount of claim stays the same and the other liable individuals have to pay the balance? For example, a couple who are no longer together, claim is from when they were together, and one of the liable individuals does not have ability to pay but the other one does? Or is this only to have the balance reduced, nothing else? Removing a liable individual is not part of the compromising claims policy or process. An individual can be removed through other processes. For example, a fair hearing. If an amount is reduced, they are both equally liable for that amount.</li> <li>What if a member was unmarried when the claim was created, they are now submitting a compromising request but are married. Do we look at the current household or when the claim was created? The current household.</li> </ul> <p>The ESPAC tri-chairs have received some processing questions from consortia and asked whether DHS would like these submitted. DHS is currently working on some supporting processing documents and asked that these be held until the documents are released. Remaining questions not answered by these documents can then be submitted.</p> <p><b><i>Summer EBT – Jonelle Brom</i></b> Wisconsin did submit their intent to participate in the new Summer EBT program beginning in 2024. Formal plans are due to FNS in mid-February. The program will be very similar to the pandemic/Summer P-EBT program. There will be a set benefit amount for children eligible for free and reduced school lunch. There will be a small team within DHS that will work directly with DPI to administer the program. IM agencies will not be expected to have any role in administering the program, but talking points and contact information will be provided to consortia to assist with questions they may receive.</p> <p><b><i>Continuous Coverage Case Issues – Jodi Noble</i></b></p> <ul style="list-style-type: none"> <li>PRT are seeing some cases where children are receiving a failure code for being eligible for another</li> </ul>			
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	<p>healthcare program (reason code 032) even though they are not open for another program on the case. PRT is doing case fixes on these for now, but a CWW fix is being worked on.</p> <ul style="list-style-type: none"> <li>• PRT has received cases where the children are open under an extension but are erroneously moving to MAGC when eligibility is run. While this is ok since the children are still eligible for healthcare, a fix is being worked on to make sure the children are open in the right healthcare category.</li> <li>• If Continuously Eligible Newborn cases close incorrectly for case level failures, these should be sent to PRT so they can be re-opened.</li> </ul>			
<p>Unwinding Planning Jonelle Brom Katie Sepnieski Alicia Grulke</p>	<p><b><i>Unwinding Funds – Jonelle Brom</i></b></p> <p>The current MA unwinding Funds contract ends March 31, 2024. A new contract will be issued for the period April 1 – June 30, 2024. To prepare for the new contracts, DHS will be sending an email today requesting information from each consortium on their projected spending through 3/31/24. The new contract will include the balance of each consortium’s unwinding funds. The total amount available to each consortium is not changing.</p> <p><b><i>2024 Contracts – Jonelle Brom</i></b></p> <p>DHS has received a signed 2024 IM contract from each consortium. The FPIP contract came out this week.</p>			
<p>2024 IMO Charter Review Alicia Grulke</p>	<p>A copy of the updated 2024 IMO Charter was shared and attached to the agenda.</p> <ul style="list-style-type: none"> <li>• Under 2024 Goals/Focal areas, Genesys Cloud and Unclear Rule were added under the list of initiatives that members will provide strategic level oversight for.</li> <li>• Under ‘DHS Staff Shall’, the following was added: “Provide an opportunity for input related to policy development throughout the process, including but not limited to initial planning, idea development, feedback, and processing discussion”.</li> </ul>			
<p>Genesys Update (Attachment) Paul Michael</p>	<p>The official announcement of the transition to Genesys Cloud came out this week. DHS will continue to use the Call Center/Genesys subcommittee to get feedback and field questions. Monthly emails will also be sent with project updates.</p>			
<p>CDPU Updates (Attachment) Robert Tillmon</p>	<p>Robert presented a power point presentation with CDPU updates that included current staffing levels, data on volume of mail and documents received by the CDPU, and production and quality metrics.</p> <ul style="list-style-type: none"> <li>• While the amount of mail received has remained stable, there has been an increase in documents received.</li> <li>• They are seeing less returned mail, reinforcing the success of DHS’s initiatives to verify correct addresses for members.</li> <li>• CDPU has seen a significant increase in documents scanned in at the county level.</li> <li>• When scanning larger batches at the county level, it’s ideal that there’s nothing over 50 pages (unless it’s for 1 case). KTA is really finicky about batches where there are too many pages. It causes issues and can cause it to go very slow (sometimes KTA won’t let CDPU workers complete the batch).</li> <li>• Reminder to counties to please add Case #/SSN/MAID #’s to the first page of the book for each case. Not doing so can cause confusion and lead to documents being attached to the incorrect case.</li> <li>• Consortia reported that they receive requests from members for a CDPU email address, so this is a need. DHS will take this request back for consideration.</li> <li>• Jonelle will re-send Robert the list of contacts for each consortium, as this is the best avenue when there are scanning questions or concerns related to a specific consortium/county.</li> </ul>			

Future Agenda Topics (Attachment)	Policy Updates, Unwinding Updates, Handbook and Manual Updates, Genesys Updates, W2 Program Evaluation.  Request was made to bring technology opportunities that might be realized from the new Genesys Cloud platform to this meeting so consortia rep's can provide feedback/input.			
Next Meeting	Friday March 1st, 2024 9:00 am – 12:00 pm	IMOA Members		

**Income Maintenance Subcommittee Key Messages  
Call Center Operational Technical Subcommittee  
January 29, 2024**

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Outages and Known Issues	<ul style="list-style-type: none"> <li>An issue with Historical Reporting preset dates specific to date filter of “Last Week” was reported the first week of January. The filter is functional for weeks after that first week. Stats for the last week of December can be run by date rather than using the present date filter.</li> </ul>		Ticket open with vendor. Root cause unknown at this time. Vendor unable to recreate issue.	
Enhancement	<ul style="list-style-type: none"> <li>Effective 1/30/2024 ATS prompts will be available in Somali.</li> <li>ATS Somali will be available as a favorite for all agents.</li> <li>When ATS Somali is conferenced into the call all prompts will play in that language.</li> </ul>			
User Guide	<ul style="list-style-type: none"> <li>A significant number of tickets received by the Genesys support team from agents, supervisors and admins could be avoided as that information is available in the User Guide.</li> <li>User Guide Agent topics include: <ul style="list-style-type: none"> <li>- Resetting WAMS password</li> <li>- Resetting local password after a temporary local password has been set</li> <li>- Instructions in call transferring</li> <li>- Instructions on how to retrieve and delete voicemails</li> </ul> </li> <li>User Guide supervisor topics include: <ul style="list-style-type: none"> <li>- Searching for calls in Interaction Recording</li> <li>- Listening to live calls</li> </ul> </li> <li>User Guide admin topics include: <ul style="list-style-type: none"> <li>- Setting emergency flags</li> <li>- Skilling</li> <li>- Adding/Removing agents from static agent groups</li> </ul> </li> <li>* User Guide troubleshooting instructions:</li> </ul>			

	<ul style="list-style-type: none"> <li>- Browser Issues</li> <li>- Invalid credentials</li> <li>- Unexpected Status Changes</li> </ul> <p>* User Guide also contains information on how to open a ticket with the help desk. Tickets should be opened by the affected user whenever possible.</p>			
Focal Topic	<p>Migration to Genesys Cloud CX</p> <ul style="list-style-type: none"> <li>• The change freeze date on our current platform (MGEP) is scheduled for February 16, 2024.</li> <li>• No changes or enhancements to call flows or routing will be available after this date to allow for a smooth transition from MGEP to GCCX.</li> <li>• The change freeze does not include adding/editing users and other minor changes.</li> <li>• Subcommittee attendees viewed a small draft portion of what the new platform may look like. Optional decisions will come back to the subcommittee for discussion.</li> <li>• At this time reporting appears to be more real time and easier to schedule.</li> <li>• There will be an “on queue/off queue” toggle.</li> <li>• Call functionality is similar to MGEP.</li> <li>• Should be able to continue using soft phones. Web RTC works like a soft phone but through the Genesys Cloud platform. May be able to integrate with Teams phone.</li> <li>• Question on whether we would want to use video chat and/or messaging across county lines through Genesys Cloud as those mediums would be vulnerable to open records requests.</li> </ul>			
Next Meeting	<p>Monday, February 12, 2024 @ 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**  
**Call Center Operational Technical Subcommittee**  
**February 12, 2024**

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Outages and Known Issues	February 5, 2024, some agents lost connection to agent desktop and were logged off the platform. When agents tried to log back on, they received a browser security error message. No root cause has been determined and the issues resolved the next day. MGEP indicated there were no disruptions in service on the platform. This is not an issue with Genesys. We can expect to see this error on occasion.			
Genesys Cloud CX Requirements Input (Agent Queue Control)	<p>Genesys team initiated high level discussion on two items:</p> <ul style="list-style-type: none"> <li>- Agent Ability to add or remove themselves from a queue. Admins would make queues available to an agent. Agent could choose to add/remove themselves from any queues available to them.</li> <li>- Elimination of <i>Extended After Call Work</i> as agent status option. On the Genesys Cloud, after a call disconnects the agent must select “done” to end the interaction. Another call will not be offered to the agent until “done” is selected. Not selecting “done” would be the equivalent to what is currently known as <i>Extended After Call Work</i>. Genesys would count the interaction from the time the call was answered to the time “done” was selected in the data for <i>Average Handle Time</i>. After call work would be counted from the time the caller disconnects to the time the agent selects “done”. Agents now become available after 20 seconds unless they put themselves in <i>Extended After Call Work</i>.</li> </ul>		Subcommittee members should bring these two items back to their consortia for further discussion.	These items will be a focal topic for upcoming subcommittee meeting.
Upcoming meeting	<p>Teams meeting Monday, February 26, 2024 @ 1:00 p.m.</p> <p>Contact: DHSGenesysCloudProject@dhs.wisconsin.gov</p>			

**Income Maintenance Subcommittee Key Messages**  
**Training Subcommittee**  
**January 22, 2024**

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
	<p>1. <b>2024 IMAC Training Subcommittee Charter &amp; Goal Review.</b>  Charter was read through. There were no questions. Charter was approved.</p>			
	<p><b>IM Training Project updates (handout):</b> Went through the updates to specific trainings and newly published trainings. It was asked if the group is notified when trainings are pulled. Renee reported that those changes are released with other updates to training.</p>			
	<p>2. <b>LTC Redesign update (handout):</b> Went over handout showing where the project is for each topic. Rollout is planned for April 30<sup>th</sup>.</p> <p>Training announcement will come out one month prior. Existing curriculum will be removed 4/30. It is advised that if workers are not able to complete the current LTC curriculum by 4/30, they should wait for the new rollout.</p> <p>There will be a Phase 3 of this project that will cover the more advanced LTC. No anticipated roll out date yet.</p> <p>It was asked if CIP forms were addressed in the training and the impacts to Food Share. Renee will follow up with the group regarding this question. Follow Up Response: CIP forms are included in Phase 2, and we will explore options for impacts to FoodShare in Phase 3 of the project.</p>			April 30
	<p>3. <b>2024 Refresher Training Prioritization Survey (handout):</b> Survey regularly sent out to group. A listed of refresher topics collected from the survey were shared. It was asked if there were any additional refresher topics that experienced workers are struggling with that should be added to the list. Additional topics to add to the list were: Reading and understanding data exchange, especially Social Security, Burial Assets and how to tell different types apart, Life Insurance, the types, policies and understanding the terminology, medical page, what is its purpose.</p> <p>Survey will be sent out in a couple of weeks to have completed within two weeks. Prioritize the list, listing your top three. Please add to the comment section any specifics that should be addressed for that topic.</p> <p>Handout with the full list will be sent when survey results ae back and the list is complete.</p> <p>IMAC Training Subcommittee will review the survey at the next meeting in April.</p>			
	<p>4. <b>New Worker Updates &amp; Reminders:</b> Admin memo 17-07 currently not available. It has been archived since it is over 7 years old. They are working on getting the memo republished. Expect when republished to have a 2022 date. Group will be informed when published.</p>			



	<p>Feedback was received at the last meetings asking if there could be a syllabus for new worker training.</p> <p>Syllabus is being drafted. It will be sent out in in the Welcome packet and Coach's guide once completed. The syllabus will over more details of the lesson and which demos are covered. Rollout is expected with the March COHORT.</p> <p>Adjustments were made to survey questions, particularly with the learner and local coach.</p> <p>Questions are being reframed to collect more details. New surveys will be implemented this Month.</p> <p>Currently working with trainers to make sure they can adjust their pacing as needed.</p> <p>Changing up review pieces at the end of class, to ensure learners are solid on all areas.</p>			
	<p>5. <b>Feedback:</b> Went through Feedback Presentation. Looked at overall response numbers to recent surveys as well as specific responses. Learners' responses were high, local coach numbers low.</p> <p>Question was asked on feedback responses, looking at ratio of coach responses to total local coaches. If there are multiple coaches in each area, maybe only one coach is responding on behalf of the whole group. Answer: DHS is counting a group with multiple coaches as being one coach for the sake of statistics.</p> <p>What about follow up after training is complete? DHS is working on post training survey to help figure out gaps.</p>			
	<p>6. <b>Training Roundtable:</b>  <i>How are you supporting learners and helping learners catch up that may be falling behind?</i></p> <ul style="list-style-type: none"> <li>- Ideal if the learner missed a Wednesday. Can used Thursday/Friday to catch up. No good process when a Monday/Tuesday is missed. All consortia reporting struggles when a COHORT Day is missed.</li> <li>- Flex time policy.</li> <li>- At interviews mention to the applicants the training and the commitment of 6 weeks. Stress no PTO the first six weeks.</li> </ul> <p>One Consortia worked with the State when there is a known absence to ensure the worker stays on target. Reaching out to Abby or Rene for solutions.</p> <p><i>How are you supporting/training workers with FoodShare Basic Work Rules and FoodShare Work Requirements?</i></p> <ul style="list-style-type: none"> <li>- Having designated time to complete the trainings.</li> <li>- Giving time before a meeting to complete the training to be able to discuss.</li> <li>- Some Consortia had desk aids and cheat sheets they are going to share with the group.</li> <li>- Question from the group was whether there was a training on locating FSET pin comments? Abby was going to research it and get back to the group.</li> </ul> <p>No suggestions mentioned for next training roundtable. Email Shelby or Mitch if any.</p>			

	<b>7. Walk on items:</b> Thanks to everyone who has sent their training attestations. Sent reminders to a couple that were not received.			
	Next meeting is April 22 <sup>nd</sup> .			

**Income Maintenance Subcommittee Key Messages**  
**Elderly, Blind, Disabled/Long Term Care Subcommittee**  
**January 22, 2024**

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Review of 2024 Charter	Completed annual review of charter.	ALL		
Update on planned LTC overhaul in MEH	Overhaul to all the LTC specific content and propose creating new section to hold specific LTC policy. Elisabeth sought volunteer reviewers, done via email mostly; there will be a kick-off meeting and ad hoc zoom meetings as needed.	EBD workers	Elisabeth & volunteer reviewers	Target is a 2024 release
Changes to F-20919D	Discussed this is needed for Group A waiver recipients, align with questions on application so all relevant items are asked and gathered. Those that want to review should email Elisabeth. -there will changes made to the home equity limit—24/25			Feb 2024
Testamentary trusts where spouse is beneficiary	Trust established in will, assets of both for the benefit of the institutionalized spouse, but trustee only has access. See MEH 16.6.4.2. State is continuing to research potential changes to this policy around testamentary trusts.		State	Update at next meeting
Update to Life Insurance policy	Changes about how to determine the face value of life insurance with face value of 1500.00 or less.	EBD workers		Ops Memo Mid-March MEH updates in April release
MAPP & In-Kind Income	Discussion of what counties are seeing--- payment stated as socialization & companionship. Completing household chores, when is this ok, when not? Counties would like some temporary clarity for uniformity across the state.		State	
Walk on items	Would like to get rid of obsolete hospital daily rates of care, as they are not accurate. Could we change how we determine monthly need for med needy test for Institutional MA? Most counties annually update these rates, this is time consuming and error prone. Could we use the daily rate used in divestment penalty periods? Then the only time workers would need to seek the actual amount would be when someone fails the categorically needy test and we to look to see if they are eligible via the medically needy test.			

Progress Report on previous topics	No feedback on the updates to the PD form changes from December. Special Status Medicaid countable amount is too large to implement as a maintenance item and would need to be a project. MSP failure code for SSI recipients- this caused some issues in the past, State continues to look at this item.			
	Next meeting April 16, 2024			

**Income Maintenance Subcommittee Key Messages  
Performance Monitoring Subcommittee  
January 17, 2024**

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Eligibility Quality Control Staffing update	Michele Brownlow retired; Nick Kwaw is supervisor of HC QC area. Ashely Schabel has taken over area Nick previously supervised	All Income Maintenance Agencies, ESPAC, Operational Leads	LaTanya	
Recap of Nov meeting	Safe at home reminder/awareness-should be confidential  Renewal timeliness-system issue impacting timeliness  Annual income page-incorrect info populating  FFM/FS renewals submitted when they shouldn't be-send to PRT  SE worksheet not calculating-aware and will be fixed  See key messages from Nov Prior errors and error rates Reports used during unwinding roundtable  Identity Verification-using SSI-SC code is an exemption for member which is why it is needed to be verified if SSI ends	All Income Maintenance Agencies, ESPAC, Operational Leads	Molly	
Policy Check in	MAGE, MAGC not opening correctly-some cases parents were never open for HC-maybe situational; may be filing date updated incorrectly; extensions may not be opening correctly-send to PRT for review/clarification; MAGC pending, and MAGE wants to open-what category should open-send case # to Jody to review.  603 alerts-popping up a lot, even for cases where nothing has changed-exceptioning out at batch run and needs to be updated; generating when nothing changed; send PRT examples to review.  CEED dates-not matching need to do a lot of workarounds, uncomfortable to go with system when it	All Income Maintenance Agencies, ESPAC, Operational Leads, PRT, DHS staff	Ann/Nicole	

	<p>appears to be different/changes; Jody will check in with staff and sent examples to see if we can get more clarification on why the CEED date may be changing and understand why the CEED moved.</p> <p>Jody clarified-don't need an example to bring up issue here but please send examples of issues in so PRT can research and determine root causes and resolve issues/provide policy clarification/guidance.</p> <p>Renewal timeliness-system issues with due dates and reporting counting multiple times, tests for CLA, EBD-MA and other types of MA-one potential issue; still researching examples sent in to PRT-report and example; may be due to renewal mode for years and not being able to confirm denials-actively researching; check if showing for multiple months; Would it show up 3 times if open for 3 programs-not sure would need to research; PPRFs being moved to file and not going through them-can cause work to show late (withdraw).</p> <p>What is Timely for renewals-verification due date; will verify what is timely.</p> <p>Jody has relayed these timeliness issues to DHS internally.</p> <p>Safe at home-have a report-figuring out how to get to IM and protect confidentiality; working with OLC.</p> <p>Customer cannot use ACCESS if their case is in confidential status.</p> <p>Email Jody with any thoughts-i.e. consortia provide staff name to assign SAH cases to Consortia leads want the number of cases that were not made confidential but should have been.</p> <p>Can the system flag the address for safe at home caseload, not currently but will look into this.</p> <p>Notices-conflicting; send in examples for PRT to review; so many system changes in recent years and not all is working as expected.</p> <p>Documents processed early Dec-started popping up in doc viewer as past due but clearly had been processed. Sent in examples-Jody working with CDPU on a report like this and likely some system issue. Please send in for examples if you see this. Looked like new document in doc viewer that just came in but had original received date and was already worked.</p>			
2024 Charter Goals	<p>Reviewed 2024 goals and charter (In Summary) Molly</p> <ol style="list-style-type: none"> <li>1. Reduce FS/HC errors, understand QC processes</li> <li>2. Utilize reports to evaluate performance, share best practices/resources</li> <li>3. Collaborate with others to reduce errors, share solutions, share outcomes of initiatives</li> <li>4. Strategize with agencies for continuous improvement/reduction of PERM, MEQC, and FSQC errors</li> </ol> <p>Subcommittee composition-same.</p> <p>Each county to designate representative and back up.</p> <p>Can have someone attend if both can't attend-if no one can attend reach out to Nicole Rolain or Ann Kriegel to get meeting summary.</p> <p>Representatives are responsible to share information and materials with their consortia/agencies.</p> <p>Reps are responsible to bring input and pre-assignments from consortia/agencies.</p>	All Income Maintenance Agencies, ESPAC, Operational Leads	Molly	

	FSQC process used in WREA, will share with group.			
QC <b>proposed</b> rule	<p>Increased sample size by 30%, would need to increase staff.</p> <p>When case incomplete-currently not included; all would be included and if not completed-would be counted as error.</p> <p>Sample timeframe-month; only HH that have eligibility action in the month of the QC. Eliminating comparison of comp 1 and comp 2-verify HH in month of action; fewer months to review and eliminates 2<sup>nd</sup> chance to have case correct.</p> <p>Any error over \$100 would be face to face interview; prefer telephone interview.</p> <p>Variances-postpone verification for expedited benefits must be documented in comments on which verification was postponed. (Is VCL sufficient?).</p> <p>Notify eligibility staff in all cases of review-mostly notified except under certain threshold.</p> <p>Implement CAP if over national average for CAPER, currently if above 1%.</p> <p>95% completion rate-impacts ability to not complete review.</p> <p>Removing SNAP performance bonuses.</p> <p>Lots of significant and impactful changes proposed; DHS not making changes at this time.</p> <p>Will allow phased approached for changes.</p> <p>Will keep us updated on what goes in or through as rule.</p>	All Income Maintenance Agencies, ESPAC, Operational Leads	LaTanya	
Consortia Report	<p>Consistent decrease in caseload, not large but consistent</p> <p>All numbers look great</p> <p>2<sup>nd</sup> party reviews-see change in error types due to AR project Ashley's group did-normal error types shifted a bit</p> <p>FS FSQC active and CAPER-no longer know cause- if timely error etc. it's all under agency error as cause since that's how FNS sees it</p> <p>By Month FFY 2023 FS YTD-won't be updated until 2 months of data from new FFY. Will look the same for next 2 months</p>	All Income Maintenance Agencies, ESPAC, Operational Leads	Donna	
FSQC error findings	<p>Aug error rate 1.69%, cumulative is 4.67% which is a decrease</p> <p>Top are wages and salaries then shelter deduction</p> <p>Arithmetic and info reported by customer are top causes in wages and salaries</p>	All Income Maintenance Agencies, ESPAC, Operational Leads	Dione	

	Negatives-decreased 25%-19.87%			
IMQA error findings	<p>Authorized Representative errors (1000 cases-831 correct) 167 with errors, 2 undetermined-waiting from policy</p> <p>90 eligibility and 30 technical errors for person as representative</p> <p>36 eligibility and 11 tech for organizations as representatives</p> <p>****Biggest error area was <b>No Form on file</b> (40 cases); make sure scanned to ECF</p> <p>Some found releases on file-make sure not using these or CIP forms for ARs</p> <p>Can mail form-should include manual letter in ECF</p> <p>Missing signature-29 missing witness signature</p> <p>If applicant signs with an x, need 2 witnesses</p> <p>Others-rep didn't sign, applicant didn't sign etc.</p> <p>Auth rep organization merged with another company and new organization changed-new form wasn't on file</p> <p>If just the contact at same organization changes-a new form is not required</p> <p>Didn't identify it was an organization</p> <p>Updating AR screen and pended for form-system does not pend for this -must have form on file before adding</p> <p>Ask if they want a person or organization as their representative</p> <p>Send copy of notices question answered incorrectly/did not match form</p> <p>Witness must sign on same day -they are witnessing customer sign the form</p> <p>Is there a report to pull a list of AR cases? Will take this back</p>	All Income Maintenance Agencies, ESPAC, Operational Leads	Ashley	
Roundtable	<p>Has consortia done anything to help reduce these errors</p> <p>WREA-has a desk aid</p> <p>More errors because causes are not as common</p> <p>Targeted case reviews</p>	All Income Maintenance Agencies, ESPAC, Operational Leads		

	<p>Staff suggestions for forms</p> <p>Screen isn't dynamic-different for POA/AR/LGL Guardian</p> <p>Is a workgroup looking into separating screens-EBD staff willing to provide input</p> <p>Who can get information and what is needed-in IM Manual-where is this now?</p> <p>Nothing specific on form, how to update, need process and information on this page; update PH-</p> <p>AR details page-lacking instruction on what in means what to enter etc. DHS aware of this</p> <p>Case comment field in AR screen would be helpful</p> <p>AR-looking for form on file, all valid signatures, copy of notices question answered correctly; DHS found by having Deloitte run report; will see if we can get report</p> <p>Simplify the form (at least for individuals), clarify instructions for witnesses</p> <p>Share desk aid</p>			
Future Agenda Items	<p>Agency developed resources came out with Agenda</p> <p>Katie-please send desk aid to Molly to send</p> <p>Send any other desk aids to any of the co-chairs to share with the group</p> <p>Thank you for sharing resources</p> <p>Next meeting is March 20<sup>th</sup>-suggestions for topics</p> <p>Partnership S/E worksheet is wrong-clearly over income and due to form open for BC. Policy advised to use form-understand impact but in customer favor. Working on update.</p>	All Income Maintenance Agencies, ESPAC, Operational Leads		