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INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

May 15, 2025
1:00 – 3:30 p.m.

Location: Department of Corrections
3099 E Washington Ave, Madison, WI 53704
Room: Pathfinder

Zoom Link: <https://dhs.wi.zoomgov.com/j/1601074465>

Join by Phone: 1-669-254-5252 | **Meeting ID:** 160 107 4465

Time	Topic	Presenter(s)
1:00 PM	Welcome	Katie Sepnieski/Jenny Hoffman
1:05 PM	Approval of April 17, 2025, Meeting Minutes (Attachment)	Katie Sepnieski
1:05 – 1:20 PM	Department of Health Services Policy Updates	DHS Policy
1:20 – 1:40 PM	Subcommittee Updates (Attachment) <ul style="list-style-type: none">Income Maintenance Operational AnalysisCall Center Technical/OperationalTrainingElderly, Blind, Disabled/Long Term CarePerformance Monitoring (Not Presenting)Fraud & Program Integrity (Not Presenting)	Jenny Hoffman Cindy Drury Jesse Wolf/Shelby Jenson Kara Ponti/Ron Redell
1:40 – 1:45 PM	Income Maintenance (IM) Funding and Contract Updates	Alicia Grulke/ Jenny Hoffman
1:45 – 1:50 PM	Consortia Feedback: IM consortia will share feedback with DHS	Lorie Graff
1:50 – 1:55 PM	Administrative Memos	Alicia Grulke/ Jenny Hoffman
1:55 – 2:00 PM	Regional Enrollment Network	Lorie Graff
2:00 – 2:05 PM	Public Comment	Katie Sepnieski
2:05 – 2:10 PM	Announcements/Future Agenda Items	All

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Income Maintenance Subcommittee Key Messages
IMOA
May 9, 2025

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
DHS Policy Updates	<p><u>New FNS Guidance on Prorated Benefits -</u> DHS received new guidance from FNS on how Food Share benefits get prorated when there's a break in service. The new guidance and scenarios were reviewed as part of the presentation. In addition to an NPE/Non-project Enhancement for Systems Updates, there will be changes to the VCL. An Ops Memo will be published 6/6/25, and talking points will also be provided.</p> <p><u>Fiscal Responsibility Act of 2023 Final Rule-</u> * PowerPoint Presentation The act requires that States raise the upper age limit for ABAWD exemption and implement new exemptions for individuals who are homeless, a veteran, or a former foster youth. The final rule, effective 1/16/25, also updates the purpose of SNAP and updates and defines the ABAWD time limit exemptions. This includes changes to the screening and verification of exemptions. DHS plans to implement the remaining FRA final rule changes ASAP. Workers will be required to use manual workarounds beginning July 1st. The Department will complete system changes to support the FRA final rule and eliminate workarounds with the February 2026 CARES release. DHS is working on an Ops Memo, updating the Food Share and FSET policy, Process Help, and the IM and FSET training.</p> <p><u>Letters to Individuals on How to Regain Food Share Eligibility After Using Three Months of Time-Limited Benefits-</u> DHS sent a CCN this morning notifying consortia that as of May 2025, when an ABAWD's Food Share eligibility ends due to using three months of TLB's, a PIN based letter will be sent. The letter provides information on how the individual can regain Food Share eligibility, either by meeting the work requirement or reporting an exemption, and how to reapply for Food Share benefits. An example of the letter was shared, and consortia staff are instructed to continue to use the talking points provided.</p> <p><u>New Provider Determination Policy-</u> A new requirement has been imposed on States for their SNAP Employment & Training programs. If an FSET provider</p>	IMOA Members	Ongoing	

	<p>determines that a participant is not suitable for their E & T program, they must notify the IM consortium. The IM consortium must reassess whether the participant is eligible for an FSET exemption or refer them to another workforce assistance program. DHS anticipates it will be very rare that an FSET provider determines they can't serve the participant, and the member is also not eligible for an exemption. Consortia are encouraged to reach out to DHS for assistance if they receive a notice from an FSET provider.</p> <p><u>Unclear Rule Training-</u> The Intro CBT is now available in Cornerstone. Registration is open for the webinars that start the week of May 20th. For those unable to attend one of the webinar sessions, a recording will also be available on Cornerstone after the webinars.</p> <p><u>MAPP Premium Payment Changes-</u> DHS is making four key changes to how MAPP members pay premiums: allowing an additional month to pay, aligning initial and ongoing premium payment methods, allowing recurring payments to be managed online, and preventing duplicate payments. Until the changes are in place, DHS will continue to charge MAPP premiums, members are expected to pay their premiums each month, and DHS will continue to not disenroll MAPP members for non-payment of premiums. Around 86% of MAPP members are paying their premiums.</p> <p><u>MAPP Work Requirement Closures-</u> Around 1,200 MAPP members are not meeting the work requirement. Following a June systems enhancement, MAPP will fail if a member is not meeting the work requirement. DHS will mail a letter in June to tell them they need to meet the work requirement to keep getting MAPP benefits. NOD's will be sent prior to closure.</p> <p><u>SWICA Discrepancies – Follow Up to Consortia Questions-</u> DHS followed up on questions and concerns that consortia had shared about the status of SWICA's. Consortia Questions/Concerns:</p> <ul style="list-style-type: none"> • While consortia are only receiving MA SWICA's now, the number appears to be higher than when both Food Share and MA SWICA's were being received. Consortia questioned why the number is higher now. • SWICA's result in a lot of busy work without much resulting case action, especially without overpayment work being done. 			
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	<p>DHS Response:</p> <ul style="list-style-type: none"> • Data exchanges and managing SWICA's is a federal requirement to promote accuracy. • Running eligibility to ensure children are in the right BadgerCare category/Med Stat Code, and ending eligibility when appropriate, is important work that's results from resolving SWICA's. • DHS does not plan to turn Food Share SWICA's back on. • The higher number of SWICA's could be for a variety of reasons. It could be because of higher recipient numbers, although some of these will be dropping off when the current income extensions end. Members not returning to regular reporting requirement following the PHE could be a contributing factor. Provisions were also put in place to increase the timeliness of getting SWICA matches. • DHS will look at federal requirements around the frequency of SWICA matches. For example, are the matches required quarterly. • DHS will watch the numbers with the next SWICA drop and bring this back to discuss if needed. <p><u>Protecting Medicaid Beneficiaries Against Impermissible Fraud & Abuse Sanctions-RESCINDED-</u> DHS received this CMS notice and are assessing the impact. They will provide an update when they have more guidance.</p> <p><u>Alert Modernization – Eliminated Alerts List</u> DHS asked for clarification from consortia on this request. Consortia indicated it will be helpful to have a list of alerts that will be going away with the alert modernization project work. DHS will work on getting this list for consortia.</p> <p><u>EM Homepage – Individual County Fax Numbers-</u> DHS will be sending out an email to consortia leads to request approval to change individual county fax numbers on the EM Homepage to the CDPU fax number.</p>			
MyWisconsin ID(attachment)	<p><u>MyWisconsin ID Update-</u> Deloitte provide and update on planning around county transition to the MyWisconsin ID. This will require counties to transition from using WAMS to multi-factor authentication for accessing state systems, including CWW. They plan to send a survey to counties to assess their readiness for the transition to MyWisconsin ID on 5/12. It will be sent to IT contacts with consortia leads copied. Counties will have from 5/12 through 5/23 to complete the survey. Deloitte will then conduct focus groups from 5/26 through</p>	IMOA Members	Ongoing	

	6/6 and share key findings with DHS at the end of June. CWW transition to MyWisconsin ID will occur in 2026.			
Summer EBT	<p><u>Summer EBT Update-</u> Wisconsin's Summer EBT plan was approved April 1st and DHS is working on implementation plans. The program provides a one-time \$120 benefit for each child in the home for households that meet the income eligibility guidelines. DHS will use school records in most cases to determine households eligible for the payments. The first issuance is planned for June 7th. Payments will continue throughout the summer as more eligible households are identified. Benefits are issued on existing EBT cards or the P-EBT cards. If a household does not have a card, a new Quest card will be sent to them. All benefits issued must be spent within 122 days.</p> <p>https://summerebt.wi.gov/s/SummerBenefitinfo Summer EBT link to Benefit Management Tool</p> <p>https://wisconsin.summerebtapp.com/ Summer EBT application link</p> <p>https://www.dhs.wisconsin.gov/forwardhealth/summerebt.htm Summer EBT DHS webpage</p> <p>https://www.dhs.wisconsin.gov/library/collection/p-03603 Summer EBT Flyer/Fact Sheet</p> <p>Summer EBT Support Team Phone Number 833-431-2224 and email dhssebtssupport@wi.gov</p>	IMOA Members	Ongoing	
IM Training Updates (attachment)	<p><u>Training Cohort Feedback-</u> Abby presented a summary of the feedback provided by consortia and next steps the Training team plans in response to that feedback. Areas of feedback that she summarized included what is going well, feedback on the training cohort model, and training gaps. Next steps include working with the IM Training subcommittee to discuss training gaps to identify enhancements, scheduling local coach meetings 1-3 times per year, exploring curriculum updates (enhancing transitions into VILT's, exploring breakout room usage), and exploring model updates (extending FS & BC + in the cohort, expanding the schedule for contingency days).</p>	IMOA Members	Ongoing	
Member Experience Survey(attachment)	<p><u>Member Experience Survey-</u> Jonelle shared an update on the Member Experience Survey. The goal is to create a uniform set of questions to collect member experience during interactions with Income Maintenance agencies that can be used to inform policy, processes, training and programs. DHS is working on the questions, modalities, and how survey information will be used and shared. She reviewed a draft of the questions for the Genesys survey as well as the lobby</p>	IMOA Members	Ongoing	

	services survey. DHS plans to turn on the Genesys survey in June 2025.			
OIG Update	<u>Skimming Incidents-</u> In response to recent skimming incidents in the southeastern part of the state, OIG is working on several initiatives. They are implementing a banner in Access to suggest that members update their PIN numbers. Those members impacted by the recent incident were sent letters and text messages. The Department was happy that TMJ4 media reached out to interview a customer, which increased awareness of the incident. They will be using system data to monitor for risk to members' EBT cards in the future and communicate quickly. Staff are reminded to review case comments as there will be comments entered if any of the communication tools have been used.	IMOA Members	Ongoing	
Genesys Update(attachment)	<u>Issue with Genesys Reporting Calls Answered-</u> They believe the reporting issue stems from a change that went into place after hours on Wednesday. Genesys plans to roll back the change today or Monday. They also indicated that they are able to retroactively fix the data impacted by the change.	IMOA Members	Ongoing	
Future Agenda Items/Next Meeting Date	<u>June Agenda Topics-</u> Policy Updates, Genesys Updates, Phase 2 Preference Center for Notices/Communication, Unclear Rule	IMOA Members/DHS Staff	June 6, 2025	
Partner/IM Discussion: Sick Pay	<u>Sick Pay-</u> Mike Rust from ABC for Health presented information on sick pay policy in response to errors that partners are identifying with how consortia are sometimes budgeting/counting this income. He suggested some systems updates that might assist in reducing errors. When an individual calls for MA/BC and report this income, after asking the amount of the income, consortia should ask who pays the premium, so the income is counted correctly.	IMOA Members/DHS		
Walk-On Items	<u>Social Security Information Issues –</u> DHS is actively working on more information/guidance for agencies reporting issues with obtaining information through data exchange and their local Social Security offices. <u>OIG Systems Access Audit-</u> DHS does not have an update on the audit at this time. OIG will be sharing information from the audit with DHS before DHS reaches out to consortia.	IMOA Members	Ongoing	

Income Maintenance Subcommittee Key Messages
Call Center Operational Technical Subcommittee
April 14 & 28, 2025

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Enhancements	The agent user interface update was completed in the week of April 28, 2025.			
ATS Interface Update	Beginning 4/7/25 – This update is transparent to the user, except for the version number at the bottom of the interface Version V1.14.			
User Guide Update	Update released on 4/9/25 – lists of updates available on the User Guide homepage.			
Known Issues	4/4/2025 – for approximately 15 minutes, some users received a “No Script Available” error when receiving calls – platform issue. Did not affect all users and was identified and resolved by Genesys Team before first reports came in.			
New Genesys Feature	Agent Timeline Detail View - Supervisors have a visual timeline of an agent’s activity throughout the reporting period <ul style="list-style-type: none"> •Provides Primary, Secondary, and Routing Statuses as well as voice and callback interactions •Can be filtered by date and time range 			
Callback	<ul style="list-style-type: none"> • The customer first callback upgrade which will allow additional callback attempts is scheduled for production the week of May 5, 2025. Starting Wednesday, May 7, 2025 - The Genesys Project Team will be testing this feature for approximately 1 ½ weeks before it goes into production. Additional information will be shared with consortia as testing is successful. • The additional retries will be set for all queues that currently offer callback. • With this release callback metrics have also improved. Callbacks will no longer be counted twice. The new calculations will take effect May 1, 2025. 			
Known Issues	On April 25, 2025, Genesys reported latency issues. The issue was resolved before any IM call centers opened. The Genesys platform responds to issues quickly, sometimes before users are aware of the problem.			

	The Genesys Support Team is asking Admins and Supervisors to remind call center agents to utilize the “X” transfer queues.			
Reporting	Changes will be made to the Daily Call Status Report to include an additional column for outbound calls.			
Next Meeting	Monday, May 12, 2025 @ 1:00 p.m.			

Income Maintenance Subcommittee Key Messages
Training Subcommittee
April 28, 2025

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
IM Training Projects (Handout)	<p>Abby reviewed trainings updated and upcoming.</p> <p><u>Updates</u></p> <p><u>January</u> Child Support Forward Health</p> <p><u>February</u> EBD MA-MAPP BC+ Applications and non-Financial Genesys Cloud</p> <p><u>March</u> LTC BC+ Prenatal</p> <p><u>New</u></p> <p><u>Feb</u> Caseworker Policy Assistant Burial Assets</p> <p><u>April</u> FoodShare Unclear Information Introduction</p> <p><u>Removed</u> Old Genesys Trainings</p>	Training Subcommittee	Abby Abernathy	

	<p>MAPP Training</p> <p><u>Upcoming</u></p> <p>Withdraws from IRA and Lump Sum (May)</p> <p>FoodShare Unclear Webinars (May)</p> <p>Prospective Budgeting Refresher (May)</p> <p>FS Unclear New Worker Updates (June)</p> <p>FS Benefits Replacement (June)</p> <p>Continuous Coverage (June)</p> <p>Action Items (June)</p> <p>FS Unclear Learning Library & Refresher (June/July)</p>			
<p>Refresher Trainings</p> <ul style="list-style-type: none"> Burial Assets Refresher training feedback 	<p>Published February 28th</p> <p>Renee asked the group for any feedback from the group</p> <p><i>-Fon Du Lac County:</i> Very positive feedback (best training, can we do more like this, life insurance vs. funeral funded contract, flowchart would be helpful as well as desk aid, very positive feedback)</p> <p><i>-Brown County:</i> Loved the refresher (very helpful for cross trained staff, liked how interactive the training is, would like to see more trainings like this)</p>	Training Subcommittee	Renee Kurka	
<p>Refresher Trainings</p> <ul style="list-style-type: none"> Special Statuses Refresher training feedback 	<p>Published December 2024</p> <p>Renee asked the group for any feedback from the group</p> <p><i>-Green Lake County:</i> Knowledge test does not have staff do any calculations or ask what the disregarded amounts are</p> <p>-Please share any additional feedback as it becomes available</p>	Training Subcommittee	Renee Kurka	
<p>Refresher Trainings</p> <ul style="list-style-type: none"> IRA's and Lump Sum Payments Training Preview 	<p>Currently in the process of designing this refresher training based on last year's prioritization survey.</p> <p>Renee gave a preview of the content within the training being developed, expected to be released in May.</p> <p>Renee asked for any feedback after reviewing the content.</p> <p>-Are qualified vs. unqualified dividends discussed? Renee will bring this back to the development team.</p>	Training Subcommittee	Renee Kurka	

	-Please share any additional feedback as it becomes available			
Foodshare Unclear Training Plan (Handout)	<p>Renee discussed the overall plan for the unclear plan training.</p> <p>Policy goes into effect with June 2025 CARES release.</p> <p><u>FoodShare Unclear Introduction CBT (pre-training)</u></p> <ul style="list-style-type: none"> -Available since April 21st -Introduces policy and mindset change -One hour -Pre-requisite to attending the webinars in May -Complete whenever works best for agency <p><u>FoodShare Unclear Webinars & Recording</u></p> <ul style="list-style-type: none"> -Several sessions starting May 20th -Dates can be registered for in Cornerstone -Instructions for signing up sent in training email last week -Review of policy in the pre-training -Deep dive into scenarios and demonstrations -Intended for workers processing FS cases -If unable to attend a webinar there will be a recording -Will count toward 12-hour annual training requirement -Question asked if there will be some practice scenarios and this will be looked at for possible implementation <p><u>New Worker Training Updates</u></p> <ul style="list-style-type: none"> -Will be introduced in cohorts starting June cohort in case maintenance section -July it will be implemented into the FS section of NWT -Others should take the pretraining and webinars -Updates to materials and scenarios will occur in June <p><u>Additional Training Updates</u></p> <ul style="list-style-type: none"> -Several CBT's to be updated to incorporate new policy -Workers do not need to retake these training unless they need a refresher on the topic -Published mid/late July and will be announced -Anticipates publishing a Q&A document after the webinars 	Training Subcommittee	Renee Kurka	
Refresher Training Prioritization Survey Results (Handout)	<p>Abby discussed the prioritization survey results.</p> <ul style="list-style-type: none"> -16 responses <p><u>Top Three</u></p> <ul style="list-style-type: none"> -How to read data exchanges 	Training Subcommittee	Abby Abernathy	

	<ul style="list-style-type: none"> -Ineligible Student Policy -Explaining Eligibility Results <p><u>Additional Suggestions</u></p> <ul style="list-style-type: none"> -EBD Burial Assets -EBD Burial Assets Ending TAND with and Without a TFS -EAI Training <p><u>What should be focused on in these trainings?</u></p> <ul style="list-style-type: none"> -Workers struggle with reading SSA data exchange -What does the P on the UIB data exchange mean? -How to fill out the school enrollment page in different scenarios -How to process cases when a meal plan is provided -Processing for two-year program students -Checking confirmed assistance groups when viewing DE -Premiums and copayments and how to understand -What is each eligibility screen telling you -Extensions and other categories ending and why -Simplify for workers checking all members eligibility -Quick mention of reasonable compatibility eligibility -How to look at eligibility on query pages for open cases -How to summarize eligibility into everyday language -How to look at history in budget pages -Eligibility results possibly needed separate per program <p>Please take back to agencies for any feedback/suggestions and send to DHS IM Training by May 16th</p>			
New Worker Updates	<p>Renee discussed updates to new workers</p> <ul style="list-style-type: none"> -Added introduction demonstration and short activity on the caseworker policy assistant in VILT as of April cohort -Expanded on Gap Filling content in April cohort (updated Louis scenario) for completing EAI and Annual Income pages -Developed resource to help workers find where to go for gap filling -Additional resources developed to cover gap filling -Looking at where to add additional FDSH information into NWT material (made enhancements after January meeting to include content on where workers use FDSH data for FS as well as pension payments showing in FDSH) -SEI refresher training was re-designed and released in December 	Training Subcommittee	Renee Kurka	

	<p>(made updates to introduction and conclusion to remove use of blocked external site)</p> <p>CWW Training cleanup project completed in February which removed over 80,000 records in training environment to help resolve clearance issues</p> <p>-CWW Training system exception error on Benefits Received page has now been resolved as of April 16th</p>			
Training Feedback (Handout)	<p><u>Abby discussed feedback from Dec 2024-Feb 2025 cohorts</u></p> <p>-Going forward, feedback will be combined into one link where you can select the relevant trainer. EBD cohort will also be combined into one link.</p> <p>-Local coach participation in surveys has remained consistently low</p> <p>-IM Training is looking at starting to utilize all the contingency days for all cohorts</p> <p>-Feedback provided that staff are worried about filling out feedback forms due to not being anonymous having to provide county as a response however this is still anonymous indicated by Abby</p> <p><u>Abby discussed IMO training feedback results</u></p> <p>-Feedback gathered in breakout rooms at IMO</p>	Training Subcommittee	Abby Abernathy	
COVID Unwinding Training Plan	<p>Renee discussed updates to the COVID unwinding training plan</p> <p>-COVID and COVID unwinding trainings have been evaluated to determine which trainings should be archived and which should remain active.</p>	Training Subcommittee	Renee Kurka	
<p>Training Roundtable:</p> <ul style="list-style-type: none"> Training Gaps (Handout): Review & provide agency input for identified training gaps 	<p>Please check with your agency and provide any additional feedback to DHS IM Training by May 16th.</p> <p>Bay Lake: Questions with applying MAPP premiums, deductibles and different types of expenses (what can and can't be used), more real-life application of using queries tied in with alerts and why alerts are generated/how to work them</p>	Training Subcommittee	Renee Kurka, Jesse Wolf, Shelby Jensen	

<p>from IMO A feedback</p>	<p>Capital: EBD training feedback has been good, burial assets are always difficult, issues with medical expenses for FoodShare, questions on what's Q? vs NQ and mandatory vs. non-mandatory verification items.</p> <p>East Central: Waiting to do EBD cohorts until after working some family cases has been beneficial, MAPP and premiums are very difficult for people, how to meet a deductible and also being able to use some expenses for medical expenses, SLMB & SLMB+, adverse action and running with dates, when its okay to verify SUE's.</p> <p>Great Rivers: MAPP Premiums and how to run and get to pend for initial premium and updating medical expenses, how do you know if its SLMB or SLMB+, how often can a member decide if they want SLMB or full benefit, how to manually track deductibles, CS training is very hard and could possibly do a project together with DCF to develop better training for how to navigate KIDS, what type of income code type to use for CS, what should and shouldn't be ? or Q?, late verification received and opening months that have passed already, why do we need to do manual verification lists.</p> <p>MILES: What do to when SEI reports not filing taxes for recent year as well as recent SEI changes, what forms are needed for different types of businesses, case comments and what should be included, running with dates for baby add and when supplements are issued can be done incorrectly, new workers skipping or ignoring DE information available, over verification is an issue all around.</p> <p>Northern: Agrees with everything other consortia have mentioned, Q? vs. NQ verification is a struggle as well as Temporary Vault Cards.</p> <p>Western: Proper use of verification codes and should not be using QV/NV at application, requirements for what verifications must contain to be able to use pretax deductions (clearly notated as pre-tax on paystubs).</p> <p>Red Cliff: Agrees that EBD should be done after working Family for a little bit, Refreshers for tribal incomes, confusion on burial assets, MAPP premium collection policy refresher.</p> <p>WKRP: Agrees with everything everyone is seeing, noticing SEI intimidation, running with dates, prospective budgeting, now is also putting a pause on EBD training until workers have had a</p>			
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	chance to do Family work for a while, will provide more feedback in upcoming days.			
Walk On Items	<p>-Suggestion that for NWT it may be more helpful to schedule 30-45 minute meeting after cohort wraps-up on Wednesdays to go over what was covered and what they are seeing with workers.</p> <p>-Feedback asking for an every other week cohort to allow processing time on off weeks.</p>	Training Subcommittee	Abby Abernathy	

Income Maintenance Subcommittee Key Messages
EBD/LTC Subcommittee
April 15, 2025

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Upcoming Projects	<p>Medicaid Redetermination Compliance Phase 1 effective July 1, 2025 Phase 2 planned for October</p> <p>Questions from subcommittee members: Will there be exemptions/overrides when multiple programs as pending? Issues right now with cases being pushed into Group A when they shouldn't be. MAPP premium payments will be addressed. MAPP changes coming also- grace period for nonpayment of premium. Suggestion: could notices be revised to show people the difference in MAPP premium vs Cost share, also on related note SLMB+ vs full benefit MA.</p>	Subcommittee	Subgroup for Phase 2 to consult on scenarios. If interested let Jill know after meeting.	
Proposed Asset Assessment changes	<p>Looking at changes to pend for assets in system. Also looking at using self-attestation to complete assessment for couples that report \$100K or less, as they would get minimum CSAS of \$50K. Need to be careful: many requests, representation is high and not everyone knows what we count and don't count. Causing the wrong level to be set and people spending down more than needed. Suggestion: EBD MA app to clearly show what and when we are requesting assets. Would like to set a 30-day time limit for these requests so they don't remain "hanging".</p>	Subcommittee	Subgroup for these potential changes. If interested let Jill know after meeting.	
Group A Divestment	Minor update to 20919-D per request of ADRCs related to distribution of Estate Recovery Handbook.	Subcommittee		

Proposed changes to annuities	Working on two annuity-related policy changes Exempting IRA annuities owned by ineligible spouse Removing requirement to check if immediate annuity can be sold on secondary market to see if it should be counted as an asset. Operations memo underway.	Subcommittee	Subgroup for this potential change, let Jill know after meeting.	
SSA Changes to overpayments	DHS working on CCN. (Note: Sent on 4/17/25)	Subcommittee		
Past Projects: SSA Modernization	Missing SSI snapshot on query, if are not finding something sent to DHS PRT. Check DEMO in bulletin that was sent with release. Why do agencies contact SSA? Dual entitlements: discrepancy received unknown source of deductions; Medicare premiums: changing, not correct or not what customers state.			
Feedback on Special Status MA determinations	Group appreciated changes but has questions about DACs who get SSDI and should get 503 disregard in addition to DAC disregard on SSDC	Subcommittee		
Walk on items	Issues with CLTS/KBMA—receiving both MA sources at same time, what to keep open in CWW. Question on if participant should be open for wavier if open for other full benefit MA. MEH and PH seem to say one thing and direction given was another. If uninsured but getting Medicare still disabled? Per county calls to SSA, different answers being given regarding a persons' disability status.	Subcommittee	Jody Noble LTC Overhaul- Let Jill know who you want to participant as this process continues	
Email	jill.govek@dhs.wisconsin.gov			
Next Meeting	07-15-25			