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INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

October 15, 2026

1:00 – 2:00 p.m.

Zoom Link: <https://dhs.wi.zoomgov.com/j/1616714667>

Join by Phone: 1-669-254-5252 | **Meeting ID:** 161 671 4667

Time	Topic	Presenter(s)
1:00 PM	Welcome	Katie Sepnieski/Jenny Hoffman
1:00 PM	Approval of September 17, 2026, Meeting Minutes (Attachment)	Katie Sepnieski
1:05 – 1:15 PM	Department of Health Services Policy Updates	DHS Policy
1:15 – 1:20 PM	Subcommittee Updates (Attachment) - Income Maintenance Operational Analysis - Call Center Technical/Operational - Performance Monitoring - Elderly, Blind, Disabled/Long Term Care - Training (<i>Not Presenting</i>) - Fraud & Program Integrity (<i>Not Presenting</i>)	Jenny Hoffman Cindy Drury Nicole Rolain Heather Merten/Kara Ponti
1:20 – 1:35 PM	CLTS Waiver Updates (Attachment)	Soktheap Pom/Joseph Bouxa
1:35 PM	Income Maintenance (IM) Funding and Contract Updates	Alicia Grulke/Jenny Hoffman
	Consortia Feedback: IM consortia will share feedback with DHS	Jenny Hoffman
	Administrative Memos	Alicia Grulke/Jenny Hoffman
	Regional Enrollment Network	Lorie Graff
1:40 PM	Public Comment	All
1:45 PM	Announcements/Future Agenda Items	Katie Sepnieski

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Income Maintenance Subcommittee Key Messages
Income Maintenance Operational Analysis
October 2, 2026

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
DHS Policy	W2 Contract Updates for 2027 - The new W2 contracts will begin January 1st, 2027. - Contractors are reducing from 8 to 4, all existing providers. - Service areas: Forward Services: Continues serving 43 counties. Workforce Connections: Expands from western region into the northwest. Workforce Solutions and America Works: Expand coverage within Milwaukee. - An updated service area map will be shared when available. - Transition planning will occur October – December, including meetings with IM consortia in the contractors’ service area	IMOA Members	On-Going	
BadgerCare Plus Work Requirement (Attachment)	Badger Care Plus Work Requirement- See attachment - DHS reviewed exemptions and how they will be determined, including data exchanges and self-attestation for some exemptions. - Jonelle will check with Abby about additional training based on the details shared. - DHS will review questions raised during the presentation and develop a supplemental Q & A. - DHS strongly encourages consortia to refer community partners to the DHS webinars. There will be another one at the end of October.	IMOA Members	On-Going	
Bureau of Systems Management (BSM) Updates (Attachment)	Access/MyAccess Login-See attachment Beginning December 12th, users can log in with an email address or their existing user ID. Members	IMOA Members	On-Going	

	must transition to email login by April 21st to avoid needing a new account. • DHS outreach will include webinars, partner resources, online guidance, mailings, texts/emails, and system and call center messaging. • Consortia raised concerns about the January mailing coinciding with work requirement implementation and a busy workload. DHS will evaluate the concern. • Consortia will be asked to provide representatives for a communication workgroup. • This change is unrelated to MyWisconsin ID; Access uses will not need one. MyWisconsin ID Update: • Wave 4 is the last user facing update. • For agencies that use FSIA, WISA and PPS, if your agency has not been contacted to request user data, please reach out to Jacob MacLea at Jacob.maclea@dhs.wisconsin.gov			
Adobe Experience Manager Correspondence Migration (Attachment)	Adobe Experience Manager Correspondence Migration-see attachment • Over the next year, DHS is migrating current correspondence to a new software called Adobe Experience Manager. This was necessary because the current software was no longer supported.	IMOA Members	On-Going	
Genesys Update	Genesys Update • File transfer issues were experienced over the last couple of weeks. Deloitte was able to get these caught up and last night's run was successful. • Next week the Spanish/Hmong/Translation updates will be completed so calls will not drop if there's no agent in queue. • DHS transitioned the Genesys contract from a direct contract with Genesys to a third-party contractor.	IMOA Members	Ongoing	
Security Update	Provisioning	IMOA Members	Ongoing	

	• DHS received approval for funding to support AIMS staff working overtime to get new user provisioning caught up. • The start of the annual audit will be pushed out until the end of October so AIMS staff can focus on the provisioning work. Because the audit is required by the LAB, the department can't push it out any further. Carla will send out the consortia schedule soon. There's no change from last year's schedule. • Training on the systems access request form will be held the week of October 12th. The invite will be sent to Security Officers but can be extended to others who would benefit from the training. There will be two recorded sessions. • DHS will be implementing a mandatory training for any new Security Officers. • The prioritization for provisioning is as follows: staff assigned to NWT cohorts, new staff, PCR provisions, then other user requests. Agencies whose staff have query only access to system are not prioritized. SAVE Application • DHS is being asked to delete any inactive SAVE accounts. Following the initial cleanup, they will be deleting inactive accounts monthly. Consortia leads are being asked to remind users to log in at least monthly to avoid their account being deleted. A good practice is to set up a monthly reminder to log in.			
Annual Heating Season Update	2027 Heating Season • Automated and early applications began September 14th. The official heating season started on October 1st. • There is no longer a statewide provider. Online applications and all calls are now being routed to individual service providers. • Vernon County is no longer administering WHEAP and transitioned service to Coulee Cap. • Based on the final extract, there was a 9% decrease in	IMOA Members	Ongoing	

	applications last year. Goal this year is to reach 170,000 heating households. Link to WHEAP vendors statewide can be found here: DEHCR Welcome to DEHCR			
FoodShare QC Metrics and Discussion (Attachment)	FSQC Error Rate- May 2026-see attachment - Active error rate for May is 7.51%, resulting in a cumulative rate of 6.44%. - Top 3 error elements include wages and salaries, shelter deduction, and child support payments received - CAPER rate is 13.43% for May, resulting in a cumulative rate of 18.84%. PCR Tool Issues & Fixes - PCR's remaining on the dashboard: A fix is planned for the October release. - Unable to view withdrawn PCR work items/system error(JAVA): A fix is not yet scheduled but will likely be included in the February release. - Employment page not populating correctly within a PCR review: A fix is planned for October. - NAN error on the Confirm Eligibility page: DHS recently learned of this issue and is researching it. It has consistently occurred on the Confirm Eligibility page when FoodShare is failing and the worker is included in PCR criteria. The issue has not occurred when a worker is outside the PCR criteria. The cause is not yet known. Clarifications About Functionality Several reported issues were reviewed and determined to relate to how the tool functions or how criteria are configured. - PCR's generated after a worker is removed from group: In the examples reviewed, PCR's stopped generating the day after the worker was removed and criteria were updated. One situation involved a worker who was still attached to a rule set. Changes	IMOA Members	Ongoing	

	should be reflected the following day. • PCR's generated for pending cases: In the examples reviewed, the case was not pending when eligibility was run and the PCR was created. Updates were made, and eligibility was run again afterward, and the case was pending. Checking the audit trail may not show user access since they didn't change anything, but the first step should be to check the audit trail to see if you can determine the sequence of events. • PCR's not generated when expected: Items to check include- ○ Case type: the case type must be included in the rule-set criteria. For example, PCRs were not generated for ongoing cases when "ongoing" was not selected. ○ Recent PCR: If criteria exclude cases with a PCR created within the last 15 days, another PCR will not be generated during that period. ○ Maximum number of Slots: Once the configured maximum is reached, additional PCR's will not be created until the number outstanding is reduced. ○ Timing in relation to AA: PCRs are not created if the due date would be after adverse action or the application due date. Examples from September 10th and 11th were reviewed. PCR's were correctly not generated because the PCR review due date would have fallen after AA. ○ PCR attributed to a worker who did not appear to take action: A worker directly accessed the Confirm Eligibility page without making a change reflected in the audit trail. Accessing that page can sometimes trigger a PCR. ○ PCR's reportedly not generated for workers on constant sample: There was an initial concern that this related to worker profiles of 50 or higher. Review found that PCR's were not generated because of timing in relation to AA. PCR Tool Guidance and Follow-Up			
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	• PRT is developing a troubleshooting steps to help agencies rule out known functionality and configuration issues before submitting concerns. Where and how this is published is still being determined. This will include issues related to AA timing, such as the September 10th and 11th examples. • A question was raised about updating Process Help to explain how PCR review due dates interact with AA. DHS will look into adding clearer language. • Because the review due date established through the criteria affects whether a PCR can be generated in relation to AA, setting up additional reviews around that window is a strategy consortia might take to accommodate the need to meet the 25% threshold monthly. • Once DHS and consortia are fully staffed, a group of PCR experts will meet regularly. <i>Agency Strategies to Reduce FoodShare Errors</i> Great Rivers-see attachment • Shared PCR strategies, including assigning reviews, establishing staff and reviewer expectations, and using worker-level data for supervisor coaching. • Uses a SharePoint HUB to share resources, error trends, and PCR information, with an emphasis on consistent reviews and communication across the consortium. • The PowerPoint presentation will be sent out. Capital • Expanding lead positions from 20 to 34 and adding PCR's to lead responsibilities. Considering a core team to manage criteria, collect data and review PCR's for consistency across reviewers. • Implementation is in the early stages; two additional leads have been hired so far. • After significant errors at beginning of fiscal year, they focused efforts on two areas: 1. Training on interviewing skills: A focus on improving interviews because their largest errors			
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	were identified as client error, and better interviewing could have prevented some. 2. Paystub Calculator: Requires use of the paystub calculator for all cases involving employment. The calculator was obtained from Southern consortium. Jonelle will be reaching out to one or two consortia whose error rate has consistently been below 6% to share their approaches next month.			
Walk-On Items	Conflict of Interest Forms - DHS received draft documents and is reviewing them with OIG to incorporate updates into the FPIP memo. - DHS will reconvene the group that previously assisted with this. - Drafts are expected to come to the November IMOA meeting. <i>Intra-consortium Email Communication Challenges & Alternatives</i> - Dane reports experiencing increasing issues with using email communication within their consortium due to increase cybersecurity etc. - Consortia were asked to review this issue and come to the November meeting prepared to share issues they are having and any other communication platforms they may be using.	IMOA Members	Ongoing	
Future Agenda Topics Jonelle Brom	November 2026: - Policy Updates - FS QC Metrics & Discussion - Genesys Updates - Customer Experience Surveys - IMMR Governance Committee Updates - OIG Updates - Conflict of Interest forms - Intra-consortium Email Communication Challenges & Alternatives	IMOA Members		

Income Maintenance Subcommittee Key Messages
Call Center Technical/Operational
October 12, 2026

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Routing Calls with No Agent “on-queue”	** Update – Last phase was completed on 10/7/2026.			
ATS File Transfers	Issues with file transferred started 9/17/2026. Transfers were completed manually every night until resolved on 10/2/26. This did not cause mismatches as the processes was completed manually.			
Genesys Vendor change	Starting 10/1 – licensing, support, and professional services will come from a 3 rd party, Connex, Inc. - No changes in infrastructure - No loss in features to users or customers			
Roundtable -	How are call centers monitoring how many people per county are on-queue both live and historically?			
Next Meeting	Monday, November 9, 2026 @ 1:00pm			

Income Maintenance Subcommittee Key Messages
Performance Monitoring
September 16, 2026

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Attendance			Ashley Schabel	
Policy check in	Jody is not able to attend-will take back to her if needed 1. What is the status of stuck access applications, change reports, or is there messaging coming? 2. Names on summaries-even though not assigned to them anymore 3. Student Eligibility and Work Study- <i>anticipate</i> working/participating; most consortia -have to have a job under work study	PM subcommittee; DHS-PRT	Ann Kriegel	
Roundtable	QC positions Breakout rooms: Criteria, sample for tool, things finding, nitty gritty info (Rooms 1-6 feedback to be compiled and emailed to subcommittee)	PM subcommittee	Ann Kriegel	

	Roundtable: 1. Determining the 25% of application renewals -no further discussion, question of who is monitoring this-will be taken back 2. Handling Nonpayment errors WREA-noting in comments section (trialing) Central-sending back; would be an error for other areas Southern/East Central-PCR reviewer fixes and error; non payment is emailed to supervisor of the worker Great Rivers-won't hold up case; sends training opportunity; if another monetary error/includes with that fix Bay Lake-Sending back for corrections How far are PCR reviewers going? Example-property tax not questionable-reviewer goes to county taxes & not correct; marked as error since IMQA counts as error? Some trying to focus on high error prone areas and not treat as full QC; simply focus on elements that often result in error and looking at budget-resolve EPPs. (this would be a good discussion for reviewer workgroup) Discussed varying consortia processes for correcting errors. PCR tool settings-Due to the hierarchy of how the tool pulls cases-need to create settings to get past the consortia level in order to get cases related to the group level setting. For example, set income on consortium criteria for income to be \$1M so it doesn't find any case and then looks at the group level settings. Discovered issues should be sent to PRT-use title to identify PCR related issues for now; ask for PCR selection for PRT dropdown for consistency in reporting/sorting; DHS will ask Jody best way to identify PCR tool issues in PRT submissions; some have reverted to manual QCs due to tool issues PCR Reports-no data since Aug 31st; tickets submitted. Where should these be submitted? PRT and data management inbox? DHS will confirm contacts for these to be sent to Would like a small workgroup for PCR reviewers DHS management is discussing this at the division level. Updates to be shared as they are known-may not be at this group. Need a forum to discuss PCR related issues-take to ESPAC to make an ask			
RECAP of July meeting	See July Key messages	PM subcommittee	Ashley Schabel	

Charter Goals	2026 Goal/Focal areas (4) 1. If a PCR subgroup occurs, should we add it? Yes, if it is under performance monitoring; wait until DHS mgmt. decides where discussions will occur 2. Do we have data for how many cases from PCR tool get pulled to FSQC? Can add if 1 goes under PM even if in 2027. Overall, 2026 goals are applicable to 2027		Kris Bovee	
Consortia Reports	Monthly Consortia Report August 2026 All consortia meeting metrics April FSQC data Cumulative active errors: 6.28% CAPERS: 79 errors 19.75% 2nd party reviews top pages in error Employment (44) confirmed asst group (21) Rep details(19)	PM subcommittee	Dione Sanders	
FSQC Error Findings	Feb/March-active & CAPER errors reviewed, not noted in detail due to more current data noted under monthly report. SEI worksheets still duplicate expenses-any idea of when this will be corrected?	PM subcommittee	Linsey Lochowitz	
HCQC Error findings	Verification codes-the number of errors are growing-discuss with staff to use “NQ” unless adding verification to ECF Reviewed top errors from July Top 3 Eligibility errors (17) Employment (7), Rep details (4), other (6) Top 5 Technical errors (245) HH members (51) Birth date on HH members (18), High school grad status (15) Marital status (12) Avg hours per pay period (12)	PM subcommittee	Angela Stanford	
IMQA Eligibility Errors	Top Eligibility errors (87) July and Aug Employment (21), current demo (8) override AG renewal/review dates (5)-duplicate PINs Technical errors (203) Household members (69); Current demo (28), Employment (19) Earned income special project next month-may see more EI reviews	PM subcommittee	Valerie Hayes	
Future Agenda items	Upcoming meeting Nov 18th	Consortia	Ashley Schabel	TBD

	Policy check in items need to be submitted to PRT prior to the meeting so that Jody can be prepared. Send policy check in agenda items to IM Co-chairs 1 week in advance: Ann Kriegel & Nicole Rolain.			

Income Maintenance Subcommittee Key Messages
Elderly, Blind, Disabled/Long Term Care
September 15, 2026

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
		Examples: All Income Maintenance Agencies, ESPAC, Operational Leads		
DHS updates	CLTS- working on CCN unknown timeline. Can share that continuous coverage policy still applies, we should not be actively seeking applications and if you have issues seek guidance from PRT. 17 ½ yoa with disability docs can be submitted for DDB determination. Project in the works for next yar with more guidance. Counties see a lot of CLTS kids transitioning to adult waiver due to entitlement due to waitlist even though the program allows them to continue on CLTS. There are some getting lost in the mix of MAGC or adult services. If your CLTS county service coordinator is trying to get query access to CARES but having issues with AIMS- Katie is working with AIMS to see if this can be achieved – submit the security form with notation of the business need and Carla will funnel it to Katie for assistance in determining proper access. Medicare-update on issues- they continue. Working the ones, we can. No resolution yet. Still issues with Medicare updating to no, updating to WI and other States as payor when they are not, impacts most dual/triple entitles. Working with SSA is a long process and State is limited to how and when they can	All IM agencies		

	update this data exchange. Update on Patient Liability form- Process Help with updated and flushed out more with examples in last update, no form will be coming out. MEH 27.7.7 also updated with examples. Request- State form that spells out what can not be used as a deviation.		--Request taken back to DHS	
Open Discussion Topics	Prior SSI Cases: Do consortia have resources that is shared with staff to help identify and calculate disregards? Consortia shared some have desk aids- those were sent in and emailed out to participants. Counties use Prior SSI screen to add as much details as possible in the comments box. Could some exchange show out of state SSI information also? Finding undisclosed assets after the initial processing of the application before confirmation: This can be frustrating for consumers and may make it seem as if agencies are being excessive or creating barriers. After an extension is granted, and then documents are being processed whether it be prior to the due date or on the due date, and we see more unreported assets, are we required to again enter another extension? If applications come in blank you may need to Q? gateposts and add text for extra information. You need to follow the extension policy and if need be, the re-application policies depending on the timeframes. DHS is working on a “best information” policy also in the meantime send them to PRT for guidance. If you have undisclosed assets, you don’t have the best information to make the proper determination since we are looking at financial and non-financial information to make the eligibility determination. Burial Assets: Does anyone have any resources for helping staff identify the type of burial asset something is, to how budget or a checklist of what is needed for each type? Example: collateral assignments vs irrevocable assignment vs absolute assignment Consortia shared desk aids and these were emailed out by Alicia. PH has been updated in the past and included many examples and documents. Group A reports- What is the stance of SSI clients that only open for QMB, can QMB be closed? DHS will revisit this, but	IM agencies		

	DO NOT close them at this time. KBMA/SC only cases – can they be pushed back to agency that hold them? KBMA- Yes via general email and if there are cases that need their action and SC- no way to do so.			
Open discussion time	Katie has asked for future questions and topics please try to include more examples and details when you send these to Heather or Kara.			