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**TO:** Income Maintenance Supervisors  
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Income Maintenance Staff  
W-2 Agencies  
Workforce Development Boards  
Job Center Leads and Managers  
Training Staff  
Child Care Coordinators

**FROM:** Vicki Jessup, Policy Section Chief  
Bureau of Enrollment Policy & Systems  
Division of Health Care Access and Accountability

| BEPS/DFS OPERATIONS MEMO |                                     |          |                          |       |                            |
|--------------------------|-------------------------------------|----------|--------------------------|-------|----------------------------|
| <b>No:</b> 11-02         |                                     |          |                          |       |                            |
| <b>DATE:</b> 01/14/2011  |                                     |          |                          |       |                            |
| FS                       | <input checked="" type="checkbox"/> | MA       | <input type="checkbox"/> | BC+   | <input type="checkbox"/>   |
| SC                       | <input type="checkbox"/>            | CTS      | <input type="checkbox"/> | FSET  | <input type="checkbox"/>   |
|                          |                                     | BC+ CORE |                          |       | <input type="checkbox"/>   |
| CC                       | <input type="checkbox"/>            | W-2      | <input type="checkbox"/> | EA    | <input type="checkbox"/>   |
| CF                       | <input type="checkbox"/>            | JAL      | <input type="checkbox"/> | JC    | <input type="checkbox"/>   |
| RAP                      | <input type="checkbox"/>            | WIA      | <input type="checkbox"/> | Other | <input type="checkbox"/> * |
| EP                       |                                     |          |                          |       |                            |

**SUBJECT:** Postponing the FoodShare Interview for Expedited Benefits

**CROSS REFERENCE:** FoodShare Handbook 2.1.4

**EFFECTIVE DATE:** January 28, 2011

**PURPOSE:**

The purpose of this memo is to announce the policy change to allow postponing the FoodShare (FS) interview under specific conditions for households eligible for expedited issuance of benefits.

**BACKGROUND:**

Currently an interview, either by phone or in person, must be conducted before any FS benefit can be issued, including expedited benefits. Expedited benefits must be issued within seven calendar days from the filing date. Because the worker is not always able to contact the applicant to complete the interview timely, this requirement can cause delays in processing the application and issuing the expedited benefits. In order to prevent delays in processing expedited FS applications and improve customer service, Wisconsin has been granted waiver

approval to allow the postponement of the interview for expedited benefits under specific conditions.

REMINDER: This policy change does **not** change the requirement that an interview must be conducted before issuing any non-expedited FoodShare benefits. This requirement must be met no matter what method was used to submit the application (ACCESS, paper application, in person or over the phone).

### ***OLD POLICY:***

Before issuing FS expedited benefits an interview had to be completed. The only other requirement to issue expedited benefits was verification of the applicant's identity.

### ***NEW POLICY:***

When a household meets the Priority Service criteria determined during client registration, the application must be processed in time to issue expedited benefits within seven calendar days of the filing date. Not all households that meet the Priority Service determination are eligible for expedited benefits once the application is processed and information is obtained through available data exchanges. Only households that are determined eligible for expedited benefits through the CARES eligibility determination will be allowed to postpone their interview. If the household is not eligible for expedited benefits because unreported income was discovered through data exchange or for any other reason, FoodShare benefits will remain in pending status for completion of the interview.

The household must submit sufficient information with the application to determine FS household size and type of income in order to postpone the interview. If an ACCESS RFA or paper RFA is submitted without listing household members or types of income, a FS benefit determination cannot be completed until an interview occurs.

When a household meeting the Priority Service criteria contacts the agency in person or by phone to request FS benefits, effort should be made to complete the FS interview the same day whenever possible. If an interview cannot be completed that day, an interview appointment within the seven day timeframe must be scheduled for the applicant at the time of the contact with the agency. If the applicant cannot make the scheduled appointment the household loses their right to expedited benefits.

When a household meeting the Priority Service criteria submits an ACCESS or paper application the IM agency must make two attempts by telephone to contact the applicant to complete the interview. If a phone number has not been provided on the application the agency must attempt to obtain a phone number through other means (e.g. previous CARES case, online tools, etc).

The Priority Service interview should not be scheduled through the mail or e-mail since the applicant may not receive the notice of the interview prior to the end of the seven day timeframe.

If the agency is unable to contact the applicant by phone after two attempts or is unable to obtain a phone number for the applicant, but there is available proof of identity, and the applicant meets criteria for Priority Service, the interview may be postponed and benefits issued. Workers must document the attempts to contact the household in case comments prior to processing the application without an interview.

The interview can also be postponed and expedited benefits issued immediately if the IM agency determines that an interview cannot be scheduled in time to meet the seven day issuance deadline, as long as identity of the applicant can be verified.

If the agency is able to contact the applicant but the applicant is unable to complete the interview during the call or within the seven days, the interview can be postponed and the expedited benefits issued.

If the agency is able to contact the applicant by phone to schedule an interview within the seven days and the applicant misses that appointment, the household loses its right to expedited benefits. The application should be processed within 30 days of the filing date. If the applicant contacts the agency within the seven day timeframe to reschedule the interview and the agency has an available appointment within the seven day timeframe, the benefits should be issued as expedited as long as the interview was completed within the seven days.

All attempts to contact the applicant as well as scheduled appointments and missed appointments must be documented in case comments.

**Note:** The policy to issue expedited FS benefits has remained unchanged. Expedited FS benefits must be issued seven days from the date of application to avoid a Quality Control finding that the application was not processed timely. The worker must make the determination to postpone the interview and issue the expedited benefits within that seven day timeframe. If benefits are issued after the seventh day an interview must be completed prior to issuing the benefits.

Workers do not have to wait until day seven to issue the expedited benefits. The benefit can be issued on the same day the worker has determined the criteria for postponing the interview has been met.

If the applicant's identity cannot be verified, the application should be processed under normal FS application processing guidelines, including the requirement for an interview prior to issuing benefits. Any documents which reasonably establish the applicant's identity must be accepted, and no requirement for a specific type of document may be imposed. The agency may use data exchange sources to obtain verification of identity such as Department of Motor Vehicles (DMV), State birth query, State on-line query from Social Security records, as well as other electronic sources to verify identity of an applicant or authorized representative.

### POSTPONED INTERVIEW REQUIREMENTS

The postponed interview must be completed within 30 days of the application filing date and all verifications must be submitted timely in order to continue ongoing benefits. Any information or verification submitted with the application or available via third party data exchange resources must be used in the eligibility determination. The same day the expedited benefits are confirmed, an appointment notice with a scheduled appointment time to conduct the interview must be sent.

Agencies may use Client Scheduling to schedule the interview. Two new activity codes have been added to reference table TACV and should be used to generate an appointment notice containing the notice language required when expedited benefits have been issued with a postponed interview. Here are the codes and corresponding letter IDs (See attachments 1 and 2 for letter text):

- F1 - CSLT: Used when the interview has been postponed to schedule an appointment for an applicant who has a telephone number listed in CARES.
- F2 – CSLU: Used when the interview has been postponed to schedule an appointment for an applicant who does not have a telephone number listed in CARES.

Two manual letters have also been created on CNSL for agencies that do not use Client Scheduling. (See Attachments 3 and 4 for letter text.)

- NCIN: Used when the interview has been postponed to schedule an appointment for an applicant who does not have a telephone number listed in CARES.
- NCIP: Used when the interview has been postponed to schedule an appointment for an applicant who has a telephone number listed in CARES.

**Note:** Workers will need to check to see if a phone number exists for the applicant to determine which of the above manual letters should be used.

The policy for determining the length of the FS certification period has not changed. The certification must not be extended beyond 12 months after the date of application. If the applicant completes the interview and provides the necessary verification to remain eligible, the certification period will be ongoing, beginning with the month of application.

If the applicant does not respond to the interview request or fails to provide the required verification, eligibility for FS and the certification period will end, and the agency is not required to send notification of a missed interview.

### **CARES:**

CARES has been updated so expedited FS benefits will not pend for the interview when a '?' is entered for the FS interview on the 'Application/Review Interview Details' page. After confirming the expedited benefits, the worker must rerun eligibility to generate the Verification Notice and pend continuing benefits for any outstanding verification items and completion of the interview.

If the household does not meet the criteria for expedited issuance, the FS benefits will pend for completion of the interview.

The appointment notice must be sent using either Client Scheduling or the new CNSL manual letters the same day the benefits were confirmed.

The following message will display on AGECE when expedited benefits have been confirmed with a '?' entered for the FS interview question on the Application/Review Interview Details page.

"Schedule FS Interview. Rerun elig to pend FS and send VR Notice"

### **CONTACTS:**

BEPS CARES Information & Problem Resolution Center

**ATTACHMENTS:**

[Attachment 1 - Client Scheduling Letter CSLT](#)

[Attachment 2 - Client Scheduling Letter CSLU](#)

[Attachment 3 - Manual Appointment Notice NCIN](#)

[Attachment 4 - Manual Appointment Notice NCIP](#)

\*Program Categories – FS – FoodShare, MA – Medicaid, BC+ – BadgerCare Plus, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – FoodShare Employment and Training, BC+ Core – BadgerCare Plus Core, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WIA – Workforce Investment Act, Other EP – Other Employment Programs.

DHS/DHCAA/BEPS/LA/MR