

WISCONSIN DEPARTMENT OF HEALTH SERVICES
Division of Health Care Access and Accountability
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To: Process Help Users

From: Angela Dombrowicki, Director
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Re: Process Help Release 09-04
Release Date: 06/05/2009
Effective Date: 06/05/2009

EFFECTIVE DATE The following process additions, clarifications or changes are effective 06/05/2009; unless otherwise noted. **Bold text denotes new text. Text with a strikethrough it in the old process/policy section denotes deleted text.**

CHANGES

Throughout the entire handbook References to client have been replaced with **customer**.

1.4 Client Registration Instructions Link to **83.9 ESC and CLA local Agency Impact** Effective 6/15/09

1.4.8.3 ACCESS Page One Processing **You must always create an RFA from an ACCESS page one because an ACCESS Page One cannot be linked to a case.**

- 1. Select the ACCESS Page One from the agency Inbox. Refer to PH 66 for more information on the Inbox. Click Next.**
- 2. The ACCESS Page One Summary will display. Choose Initiate ACCESS Application from the bottom of the page. You may, but do not have to assign the applications at this time, click Next./ Enter**
- 3. Basic Information Page will display, click Next / Enter.**
- 4. Potential Individual Matches page will display. Review the information displayed on the page, but do not link the Page One, you must always create a new RFA when you receive an ACCESS Page One.**
- 5. Select to "Create new RFA". This new RFA will merge to the known CARES case when intake has been initiated.**
- 6. Make RFA comments.**

2.3.1 Process a Mail In or ACCESS Application or ACCESS Page One document 1. Select either MI - Data Entry Complete, ACCESS Application or ACCESS Page One from the Inbox and click Next. Refer to PH 66.1 on How to Access the Inbox. If you choose an ACCESS Application ~~or ACCESS Page One~~, you may first need to complete Client Registration. **If you choose an ACCESS Page One you must complete Client Registration and create a new RFA that will merge to any open or recently closed case.** Refer to PH 1.4.8 on completing CR for the ACCESS Application or ACCESS Page One

3.3.2 Delete Person At Review **Example 1:** At review, Mary reported her son John was no longer living in her household. John had been included in both the Health Care and the FS AGs as an eligible child. The worker entered the delete indicator during the review and received the message to run eligibility to complete the person delete process. Mary has provided all the verification necessary for the Health Care determination but is pending shelter ~~and utility~~ expenses for FS. When the worker runs eligibility, FS is pending because John was included within the FS group, the person delete process

will not be complete until both the Health Care and the FS AGs are confirmed on AGECE. John will not appear on the case in CWW but would still be displayed on CARES screen ANID. If the worker attempted to add John back to the case prior to confirming both the Health Care and FS AG, John would fail clearance because he is already listed on the case. Additionally, if John were to apply on his own or would like to be added to a different CWW case, he will fail clearance until after his mothers case is confirmed.

4.1.3 Initiate and Process a Review

10. When processing a ~~Mail In~~ telephone review, print the CAF and mail it to the customer for review explaining to them that the review is not complete until the signature page is signed and returned to the agency. Enter a ? in the signature field on the General Case Information page in CWW to pend for the signature.

6.1.6 Transfer an RFA

PH updated to reflect new policy and process per ops memo 09-31.
Effective 6/15/09

18.1.2 Utilities Introduction

The "Have you received WHEAP at the current address in the current or previous heating season?" question will default to Yes as of the 6/15/09 CARES updates.

Also added a screen shot of the WHEAP question that is default answered to Yes

18.1.2.4 Contributes in an Unknown Amount

~~The customer will receive the standard utility deduction. Entering a \$0.00 will not allow the utility deduction, resulting in a potential eligibility error.~~

20.1 Migrant Eligibility

SFEX eligibility

47.2.1 End Case Access

In very rare situations, after establishing an account, some people may not want any of their information to be available through ACCESS. In these situations, full viewing individuals may choose to "End Case Access" through Check My Benefits. This means that no one on the case, including that individual, can see his/her case information through ACCESS. Only full viewing individuals can take this step.

ACCESS customers should only end case access if they have serious concerns about someone being able to use their SSN, date of birth, and case information to log into ACCESS without their permission. If someone changes his/her mind later, they must follow "Restoring Case ACCESS" instruction.

47.2.2 Restoring Case Access

1. The customer sees an IM worker and provides proof of ID

2. Worker asks the local CARES coordinator to send an e-mail to the CARES Call Center requesting that viewing privilege be restored

3. CARES Call center will forward the request to appropriate BEM technical support staff to restore the viewing privilege, and

4. DHFS will send notification to the CARES Coordinator when access to Check My Benefits is restored

5. The local agency will then notify the customer.

50.2 Verification Checklist

FoodShare (FS) Quality Assurance errors have been found in instances where customers were either provided with a verification checklist which included incorrect verification due dates or were never issued a proper request for verification. Advocates, local agencies, FS QC staff and the FS policy staff have requested changes to the CWW Verification Due Date page to eliminate these errors.

As of the 6/15/09 CARES enhancements, the Verification Due Dates page will default the Mail Checklist response field to 'yes' to trigger verification checklist mailings. In addition, logic will be added to the system to prevent duplicate verification checklists from being mailed to the household. The logic will be similar to that of the true change logic for customer correspondence [\(PH 58.1\)](#).

The verification due date calculation on this page is being fixed to correctly calculate verification due dates.

Effective 6/15/09

58.1.2.1 Enrollment and Benefits Brochure

New Chapter
Effective 6/15/09

62.3 How To Find The Child Support Court Ordered Amount

Debt class codes, or distribution hierarchies can be found in the >Child Support State Disbursement Unit within the Child Support Handbook > Chapter 3 > Section 1.5, page 3-3.
To view the Child Support Handbook, a DWD Workweb ID and Password required.

66.1 Inbox

A link to the Child Support Manual was added to this chapter.
Link to **83.9 ESC and CLA local agency impact**
Effective 6/15/09

68.1.4 Individuals Without Verification and Affect on Household Eligibility

This entire section has been replaced due to the policy and process change communicated within OPS Memo 09-23

68.2.3 Good Faith Code Members Only

Updated to reflect policy change that was communicated within OPS Memo 09-23

68.2.4 Extension of Reasonable Opportunity Period Applicants

This information was replaced by a link to PH 68.10.4

83 BC+ CLA (ESC and Local Agency Impact)

83.1 – 83.8 Reserved for ESC Process

83.9 Local Agency Impact Effective 6/15/09

- 83.9.1 Access and the Inbox Changes
 - 83.9.1.1 Inbox Listing
 - 83.9.1.2 Application Summary Page
 - 83.9.1.2.1 Application Summary Page (full screen example)
 - 83.9.1.3 Check My Benefits Worker View
 - 83.9.2 Client Registration Page Changes
 - 83.9.2.1 Basic Information Page
 - 83.9.2.2 Potential Individual Matches Page
 - 83.9.2.3 Individual Summary Page
 - 83.9.2.4 Additional Data Page
 - 83.9.2.5 RFA Summary Page
 - 83.9.3 Enrollment Services Center (ESC) Screener
 - 83.9.3.1 ESC Screening Step by Step
 - 83.9.3.2 ESC Screening When Not Completed Prior to Creating an RFA
 - 83.9.3.3 Request for CLA Indicated During a FS Only Review
 - 83.9.4 Application Entry Page Changes
 - 83.9.4.1 General Case Information Page
 - 83.9.4.2 Current Demographics Page
 - 83.9.4.3 Individual Summary Page

- 83.9.4.4 Case Summary Page**
- 83.9.4.5 Generate Summary**
- 83.9.4.6 Other Health Care Programs**
 - 83.9.4.6.1 Other Health Care Programs Summary Page**
 - 83.9.4.6.2 Other Health Care Programs Gatepost**
- 83.9.4.7 Medical Gatepost**
- 83.9.5 Working with the ESC**
 - 83.9.5.1 Transferring Cases / Applications Between the ESC and County.**
 - 83.9.5.2 Changes Occur That Open County Administered Programs and Close the ESC Programs**
 - 83.9.5.3 Transferring**
 - 83.9.5.4 Shared and Companion Cases**
 - 83.9.5.5 CLA Closures**
 - 83.9.5.6 EBD MA Deductible and Denial Due to Over Assets**