

Tony Evers  
Governor



DIVISION OF MEDICAID SERVICES

1 WEST WILSON STREET  
PO BOX 309  
MADISON WI 53701-0309

Kirsten L. Johnson  
Secretary

State of Wisconsin  
Department of Health Services

Telephone: 608-266-8922  
Fax: 608-266-1096  
TTY: 711

## INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

August 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

| Time           | Topic  | Presenter(s)  |
|----------------|--|---|
| 1:00 PM        | Welcome  | Katie Sepnieski/Lorie Graff   |
| 1:00 PM        | Approval of June 20, 2024, Meeting Minutes (Attachment)  | Katie Sepnieski   |
| 1:00 – 1:20 PM | Department of Health Services Policy Updates   | DHS Policy  |
| 1:20 – 1:45 PM | Subcommittee Updates (Attachment) <ul style="list-style-type: none"><li>Income Maintenance Operational Analysis</li><li>Call Center Technical/Operational</li><li>Elderly, Blind, Disabled/Long Term Care</li><li>Training</li><li>Performance Monitoring</li><li>Fraud &amp; Program Integrity (Not presenting)</li></ul>                                     | Lorie Graff<br>Kris Weden<br><br>Kara Ponti/Ron Redell<br>Mitch Birkey<br>Nicole Rolain/Ann Kriegel |
| 1:45 – 3:10 PM | CARES Release (Attachments) <ul style="list-style-type: none"><li>NAM to F5 Migration</li><li>Notice of Decision Modernization</li><li>Communication Preference Center</li><li>Continuous Coverage for Children</li><li>ESAP</li><li>Fiscal Accountability Act</li><li>Katie Beckett/Senior Care/Well Woman Medicaid</li><li>Online Food Replacement</li></ul> | DHS Staff   |
| 3:10 PM        | Income Maintenance (IM) Funding and Contract Updates   | Alicia Grulke/Lorie Graff   |
| 3:15 PM        | Consortia Feedback: IM consortia will share feedback with DHS  | Lorie Graff   |
| 3:20 PM        | Administrative Memos   | Alicia Grulke/Lorie Graff   |
| 3:25 PM        | Regional Enrollment Network  | Lorie Graff   |
| 3:30 PM        | Public Comment   | All   |
| 3:30 PM        | Announcements/Future Agenda Items  | All   |

DHS is an equal opportunity employer and service provider. If you need accommodations because of disability, or need an interpreter or translator, or if you need this material in another language or in alternate format, you may request assistance to participate by contacting [DHSBEOTAdmin@dhs.wisconsin.gov](mailto:DHSBEOTAdmin@dhs.wisconsin.gov)

\*If you want to participate by web meeting, you can follow along at your computer by logging in as a guest to <https://dhs.wi.zoomgov.com/j/1619409056> 5 minutes ahead of time.

[www.dhs.wisconsin.gov](http://www.dhs.wisconsin.gov)

**Income Maintenance Subcommittee Key Messages**  
**IMOA**  
**Thursday, July 11, 2024**

| Agenda Item                 | Message/Action/Motion  | Assigned To/<br>Referred to IMAC | Deadline | Closure |
|-----------------------------|--|----------------------------------|----------|---------|
| DHS Policy/COVID-19 Updates | <p>Jonelle Brom reported that this will be the last month we will see COVID-19 updates on the IMOA agenda. Autumn Arnold reported that system updates for the new Unclear Rule were made as part of the June CARES system updates. Based on some recent concerns connected to client impacts of this rule change, implementation of the Unclear rule will now be delayed until June of 2025. This will also give agencies more time to train and prepare. Autumn also reported that letters originally planned to go out this month to roughly 3,000 young adults, those who turned age 19 during unwinding, will be delayed. We have now learned that the number is 23,000 so input was requested on if these letters should be spread out rather than mailed all at once. The general feedback was to stretch out the mailing over a time-frame as long as possible, ideally 6 months. Autumn also reminded members that MAPP premium reinstatement will start in August. Julie Taylor reminded that recent flooding is prompting some foodshare members to request replacement benefits. Julie reminded staff to review the foodshare manual on the specifics of replacement benefits. Julie also highlighted that two Fond du Lac employers will be laying off staff members so there will likely be an increase in requests for benefits in this part of the State. Jonelle also reported that a couple of outreach projects will soon be starting at DHS. A full overview of the projects will be presented at the August IMOA meeting. Jonelle stated that some of this project work will begin before the August meeting so a few counties might get a call from DHS staff about these projects. Jonelle reported on June 22, \$150 million dollars of summer EBT benefits were issued and all but \$18 million of benefits have already been used. Each family received \$120 per child for the summer. Consortia do not need to worry about the summer EBT program, if staff get questions they can just refer clients to the summer EBT support center. Jonelle also gave an update that good progress is progressing on the 2025 IM contract and that contracts should be issued very timely this year. Lastly, Jonelle reported that all LTE employees are now gone. Call time also</p> | IMOA Members                     | On-Going |         |

|  |   |              |          |  |
|--|---|--------------|----------|--|
|  | continued to decrease between May and June.   |              |          |  |
| DEAR – Disabled Elderly Accessible Renewal | Abbey Graf reviewed final questions on the DEAR program. The DEAR program will extend certification periods for up to 36 months. The first question was will Genesys have messaging on the DEAR one-time conversion letters when they are issued. Genesys messaging is being pursued to provide this information while clients are waiting on-hold in Genesys. The second question was how should medical expenses be budgeted for DEAR members. Medical expenses for EBD members can be budgeted as an on-going monthly expense, as a one-time expense, it can be averaged over the certification period, or over the remaining period. If expense occurs and is reported in the first 12 months of the 36-month certification period, workers can budget over the rest of the 12 months. The second option is that the onetime expense can be budgeted over the entire remaining 36-month period. If the expense occurs after the first 12 months, the expense has to be claimed as a one-time expense or averaged over the remaining months left in the certification period. Any additional questions on the DEAR program should be submitted to the problem resolution team.   | IMOA Members | On-Going |  |
| Continuous Coverage                        | Nicole Huffman reminded IMOA members that qualifying children under 19 are eligible for 12 months of continuous coverage as of 1/1/24 and that children under this continuous coverage cannot receive a new or higher premium during this period. A few issues have been identified while implementing this program. The October 2024 CARES release will fix some of these issues. Some of these issues occur when a child moves from a case with one parent to a different case with the other parent. The CARES October release will start building separate assistance groups for each member on the case for most health care programs. The changes will also ensure that a new child being added to the case is properly determined for coverage. In addition, when a new assistance group opens, new 12-month certification periods will be established for each eligible non-time-limited health care member, except that continuous coverage/certification periods will not be extended for children who would be negatively impacted by the change (for example, they will maintain their current period if they would have lost eligibility, moved to CHIP, or had an increase in premium during their continuous coverage period). A new reason code is also being created to highlight when continuous coverage rules are being applied to specific members. More information will be | IMOA Members | On-Going |  |

|                               |   |              |          |  |
|-------------------------------|---|--------------|----------|--|
|                               | coming at the August IMAC meeting and in an upcoming operations memo. Any additional questions can be sent to the problem resolution team.  |              |          |  |
| Genesys Update                | As the cloud based Genesys system is implemented, questions have been raised about the call back functions. Genesys is presently testing member first call-back functions. It is anticipated that this feature will be ready for us to test in a few months. We have the option to begin using agent first call back and then later add member first call-back functions, or we could hold off on implementing any call-back features until the member first call-back function is ready. We have to implement a state-wide call back option, it cannot vary by consortium. Consortia asked if we could have some time to discuss and then come back with our responses. DHS asked that an answer be provided to them by next week Thursday. Consortia asked that more information on callback options be provided in writing to the Genesys Subcommittee before their meeting on Monday. | IMOA Members | On-Going |  |
| Security Update               | Carla Treuthardt reported that we will be kicking off the annual CARES audit in August and it will run through the end of the year. Please remember to update your agency security officers, as there have been many changes in many agencies. Carla reminded consortia that Wisconsin help desk helps with password resets and for lost accounts but CARES security desk helps with all of the system security requests. Carla also reminded staff to fully fill out the security request form so it does not have to be sent back which delays the security access being set-up. Carla reported that some of the security manuals have been delayed due to staff turnover. The security manual work will be reprioritized and we should be seeing the manuals soon.   | IMOA Members | On-Going |  |
| Unwinding Operations Planning | Jonelle reported that last month the request was made to capture consortia unwinding operations best practices. Members were broken into four groups to discuss specific questions. Responses were captured in notes that were shared with Alicia. General positive themes included; it was great to offer remote work, overtime, hiring project staff, us of the limited term-employees, cross training staff and more coordination and check-in meetings. Some of the challenges were dealing with constant change-specially policy changes, staff turnover, reduced caseloads but with increasing complexity, volume of work, and supporting new staff that did not know policy outside  | IMOA Members | On-Going |  |

|                                       |  |                        |                       |  |
|---------------------------------------|--|------------------------|-----------------------|--|
|                                       | unwinding. Jonelle thanked everyone for their outstanding work during unwinding and working together as a team to achieve very good outcomes.  |                        |                       |  |
| Cross Department Document Review      | Consortia members reviewed the October-December calendar of anticipated department project implementations planned by DHS, DCF and DOA.  | IMOA Members           | On-Going              |  |
| Future Agenda Items/Next Meeting Date | Agenda items for our next IMOA Meeting include; Policy updates, Genesys updates, Enrollment and Outreach Research Project, Mass Quest Card PIN Update and a quarterly CDPU update. The next IMOA meeting will take place on <b>Friday, August 2nd.</b> | IMOA Members/DHS Staff | <b>August 2, 2024</b> |  |

**Income Maintenance Subcommittee Key Messages**

**IMOA  
August 2, 2024**

| <b>Agenda Item</b> | <b>Message/Action/Motion</b>   | <b>Assigned To/ Referred to IMAC</b> | <b>Deadline</b> | <b>Closure</b> |
|--------------------|--|--------------------------------------|-----------------|----------------|
| DHS Policy         | <p>Health Care Policy(Autumn):</p> <ul style="list-style-type: none"> <li>• June health care renewals are just about wrapped up, and then we are officially done with the unwinding.</li> <li>• A question was raised by partners at the Unwinding Task Force over ongoing MAPP cases that now have to resume paying a premium. DHS provided clarification that these are considered ongoing premiums and can be paid following any of the available options.</li> <li>• A new issue that was reported is that some members are not able to make their premium payments through Access. Member Services is referring individuals to the local agency. Jodi will follow up on this.</li> <li>• DHS is working on correcting the coupons with the correct address. Staff should follow 25.4.1 until the address is corrected.</li> <li>• A question was received from consortia whether the Admin Renewals Monitoring report in IMMR is only those cases that went through administrative renewal without any worker action. Answer: Only 3% (387 out of 13,640) on report represent cases that required worker action based on an alert after the admin renewal was systematically run. The majority of cases on the report were run entirely through an administrative renewal with no worker action.</li> </ul> | IMOA Members                         | Ongoing         |                |

|  |  |  |  |  |
|--|--|--|--|--|
|  | <ul style="list-style-type: none"> <li>• There's an upcoming minor policy change for Tribal General Welfare Assistance payments. Current policy only disregards these payments for EBD Medicaid when an individual is eligible based on meeting an income test by the tribe. For BadgerCare Plus, these payments are disregarded regardless of any tribal means test. Change in policy will align EBD and BadgerCare Plus policy to disregard these payments for both programs.</li> <li>• Agencies have asked for an update on Foster Care MA redeterminations post unwinding. Eligibility for these individuals were pushed out to the end of the unwinding. 4500 letters were sent in April and May to notify that their Foster Care MA was ending. In addition, 900 individuals were identified in March/April whose eligibility needed to be reopened. Eligibility that was extended during the unwinding has now ended.</li> <li>• Given discussion over staggering the 23,000 letters that are going out to young adults that aged out and haven't gotten other health care coverage, DHS will be sending letters in eight batches, 2800 every two weeks from August through November.</li> <li>• DHS is working on the FFY 2024 ABAWD Geo Waiver. Based on unemployment rates, the Department expects the same counties to be exempt: Menomonie, Forest, Iron and Adams. They also expect to add four more counties: Douglas, Bayfield, Florence, and Marquette. The city of Racine and most of the city of Milwaukee are also included. The ten tribes are expected to be the same as last year. DHS will use discretionary exemptions to include two more tribes. The new waiver will begin in October with the start of the next fiscal year. Letters will go out when individuals have a change to their ABAWD status within the system.</li> </ul> <p>Food Share Policy(Julie):</p> <ul style="list-style-type: none"> <li>• Reminder – The Food Share interview waiver expires August 31<sup>st</sup>. As of September 1<sup>st</sup>, interviews will be required for both Food Share applications and renewals.</li> </ul> <p>Food Share Handbook Updates – August 22nd(Julie)PRT :</p> <ul style="list-style-type: none"> <li>• Reviewed Food Share handbook updates- summary document emailed to IMOA members.</li> </ul> <p>Healthcare Handbooks Updates – August 22nd(Rachel &amp; Elizabeth):</p> |  |  |  |
|--|--|--|--|--|

|  |   |  |  |  |
|--|---|--|--|--|
|  | <ul style="list-style-type: none"> <li>Reviewed BadgerCare and MA handbook updates-summary document emailed to IMOA members.</li> </ul> <p>PRT Updates(Jody):</p> <ul style="list-style-type: none"> <li>PRT became aware of a page that is showing up in CARES related to the unclear rule. It's under the Food Share section, navigation, other Food Share information. The page is read only, but DHS wanted to give consortia a heads up in case staff see it and ask questions.</li> <li>A CCN will be going out next week with a report that includes cases that require worker action. The cases on the first tab of the spreadsheet will include individuals aging out that have a CHIP status code. The second tab are those that are not in a CHIP status code. The due date for worker action for the first group is Adverse Action in August so their coverage doesn't extend beyond 8/31. The due date for the second group is the end of August so their coverage doesn't extend past the end of September. Jodi pointed out that many of these cases have outstanding alerts to run eligibility, but this hasn't been done. The CCN will include a reminder for staff to prioritize taking care of these alerts moving forward(Alert 336 and 621).</li> <li>Question from consortia – What should we do if MAPP members didn't get a premium notice and now have only a few days before it's due? PRT answer: As these are being researched, many of these show that a premium notice went out, but still researching whether some weren't generated. For those with Access accounts, they can find the amount they owe within Access. Workers should verbally give them the address to submit their payment. PRT would like consortia to continue to send in cases that didn't receive a statement. A question was also raised whether special messaging or a transfer link can be added to Genesys that callers can select for more information. DHS will look into this.</li> </ul> <p>Summer EBT(Jonelle):</p> <ul style="list-style-type: none"> <li>431,000 children have received a summer EBT benefit so far. This exceeds the estimate of how many would be eligible. There's another issuance planned for August, and a catch up run in September. Questions about S-EBT can be directed to 833-431-2224 or <a href="mailto:dhssebt support@wi.gov">dhssebt support@wi.gov</a>.</li> </ul> |  |  |  |
|--|---|--|--|--|

|                                       |  |              |            |  |
|---------------------------------------|--|--------------|------------|--|
|                                       |  |              |            |  |
| FSET Referral Research                | <ul style="list-style-type: none"> <li>Wisconsin was awarded grant funding to study improvements to the FSET program statewide.</li> <li>The research team is asking for consortia to meet with them to answer a brief questionnaire to get agency feedback, which would be a half-hour commitment. If interested, please reach out by 8/9 to <a href="mailto:Stephanie.mabrey@dhs.wisconsin.gov">Stephanie.mabrey@dhs.wisconsin.gov</a> <a href="mailto:Ryan.vosters@dhs.wisconsin.gov">Ryan.vosters@dhs.wisconsin.gov</a></li> </ul>   | IMOA Members | August 9th |  |
| CARES MyWisconsin ID MFA (attachment) | <ul style="list-style-type: none"> <li>A new authentication system will be launched in 2026 that will replace WAMS and WILMS, which is what we use today to access most CARES-related systems. It will change how we log into CARES and other systems. There will also be a self-service system for account creation and management. The MFA factors will require a mobile device or a hard token(hardware that plugs into your computer). Jonelle pointed out that each agency will decide how they will meet the new requirement(mobile device, hard token etc.). This change will not just impact ES, but other areas of the county where staff have a Wisconsin user ID.</li> <li>Submit questions to <a href="mailto:dhsmywiid@dhs.wisconsin.gov">dhsmywiid@dhs.wisconsin.gov</a></li> </ul>  | IMOA Members | Ongoing    |  |
| February 2025 Policy Projects         | <ul style="list-style-type: none"> <li>Towards getting consortia feedback sooner on projects, DHS presented and asked for consortia feedback on three projects that are planned for February 2025 – <ol style="list-style-type: none"> <li><i>FSIA Info in CWW:</i><br/>Scope:<br/>Functional Screen Information Access System/FSIA data will be automatically updated in CWW for LTC enrollments tracked inside or outside of CARES.<br/>Goals: <ul style="list-style-type: none"> <li>Reduce HCBS disenrollments due to loss of Medicaid when a member is losing their Group A eligibility and needs to be tested for Group B/B+.</li> <li>Help workers more easily identify people who are in Community Waivers but don't have a Community Waivers page in CARES due to streamlined enrollment(i.e.- increase the visibility/accessibility of the LTC Enrollment Information Tracked Outside</li> </ul> </li> </ol> </li> </ul> | IMOA Members | Ongoing    |  |



|  |  |  |  |  |
|--|--|--|--|--|
|  | <p>CARES screen).</p> <p>2. <i>SSA Data Exchange Modernization:</i><br/> Scope:</p> <ul style="list-style-type: none"> <li>○ Update SSA DX details pages to remove unnecessary and duplicative data elements and better organize them.</li> <li>○ Add two new history summary pages (one for SSA and one for SSI) with updated information over time, with magnifying glasses that take workers to DX detail pages.</li> <li>○ Reduce discrepancies and discontinue FYI alerts related to data exchange updates when there is nothing for the IM worker to do.</li> <li>○ Fix reported issues(SS/Medicaid benefits updating with begin date one month too early during COLA, SS/Medicaid benefits updating too early when we receive a “future entitlement” record.</li> <li>○ Make significant updates to Process Help</li> </ul> <p>3. <i>Medicaid Redetermination Compliance:</i><br/> Scope:</p> <ul style="list-style-type: none"> <li>○ Ensure that members have until the end of the renewal month to get their renewal in. Members who are disenrolled at AA for lack of renewal will “pop back open” for the next month if they get their renewal in after AA but before the end of the month.</li> <li>○ Ensure that members who are losing eligibility in their current category are tested on all bases before their current Medicaid category closes.<br/> This includes but is not limited to- <ul style="list-style-type: none"> <li>- People who move from a non-disability to a disability basis of eligibility(e.g. MAGS to MAPP). These members will stay enrolled in their current category until DDB makes a determination (as long as the member is and remains otherwise eligible for the Medicaid category based on disability).</li> <li>- People who are aging out of MAGC or Katie Beckett at 19 and need to apply</li> </ul> </li> </ul> |  |  |  |
|--|--|--|--|--|

|                         |   |              |         |  |
|-------------------------|---|--------------|---------|--|
|                         | <p>as an adult. If application is received timely, current eligibility will be extended until application is fully processed.</p> <ul style="list-style-type: none"> <li>- Community waivers members who are switching Medicaid categories. These members will remain open in their current category until the IM agency determines if they are eligible for the new category.</li> <li>• Breakout groups were held to get written feedback on the 3 projects – <ol style="list-style-type: none"> <li>1. What questions, reactions, and/or concerns do you have about these projects? What else would be helpful to know?</li> <li>2. What do IM agencies need over the next 6 months to be successful in implementing these changes?</li> </ol> <p>Each group submitted written feedback to DHS, but a couple of initial comments were that consortia appreciate the opportunity to provide feedback earlier when projects are being worked on by the department, and rep’s would like to get some initial information prior to the meeting so they can check in with their staff and be better prepared to provide feedback.</p> </li> </ul> |              |         |  |
| Genesys Update:         | <ul style="list-style-type: none"> <li>• DHS Comms team is working on communication to partners about the temporary unavailability of the Call Back feature as consortia transition to the new Genesys platform. The communication will be shared with consortia within the next couple of days, along with a list of partners that were sent the communication.</li> </ul>   | IMOA Members | Ongoing |  |
| CDPU Update(Attachment) | <ul style="list-style-type: none"> <li>• While the volume of mail is about the same, data was shared to show the increase in documents and the increase in the number of pages per document submitted to the CDPU( 39,096 documents in June 2023 vs 124,160 in June 2024).</li> <li>• The CDPU workload is 85-86% of their pre-covid workload.</li> <li>• They will be adding two positions in September and October(currently at 35 staff).</li> <li>• The main issue they are experiencing is continued intermittent KTA slowness impacting their overall efficiency. They are still meeting their SLA’s, but are working with Deloitte on the KTA slowness.</li> </ul>   | IMOA Members | Ongoing |  |

|                     |   |              |         |  |
|---------------------|---|--------------|---------|--|
| Future Agenda Items | <ul style="list-style-type: none"> <li>• Policy Updates(standing agenda item)</li> <li>• Genesys Updates(monthly)</li> <li>• Mass Quest Card PIN Update(Sept)</li> <li>• FSET Provider Information(Sept/Oct)</li> </ul> | IMOA Members | Ongoing |  |
|---------------------|---|--------------|---------|--|

**Income Maintenance Subcommittee Key Messages  
Call Center Technical/Operational  
June 24, 2024**

| Agenda Item             | Message/Action/Motion  | Audience/Recipient | Assigned To | Deadline |
|-------------------------|--|--------------------|-------------|----------|
| Training Status         | <p>The following trainings have been published to the User Guide, Cornerstone or Process Help:</p> <ul style="list-style-type: none"> <li>• Agent section of GCCX to User Guide</li> <li>• Agent and Supervisor training excluding ATS to Cornerstone</li> <li>• Supervisor section of GCCX to User Guide</li> <li>• Administrator section of GCCX to User Guide</li> <li>• Administrator and ATS training to Cornerstone</li> <li>• ATS to Process Help</li> </ul>  |                    |             |          |
| Rollout Schedule UPDATE | <p>Pilot and Phase 1 have been completed. The following entities have moved to GCCX: WFCAP, Estate Recovery, PRT/DMS Training, EMCAPO, Enrollment Broker, IMQC and OIG.</p> <p>The project timeline has been delayed by 3 weeks allowing for additional testing of various features including ATS and to allow additional time for users to complete trainings.</p> <p>Following is the <b>new schedule for rollout</b>:</p> <ul style="list-style-type: none"> <li>• 8/1 Phase 2 – Bay Lake, East Central, W2, Tribes</li> <li>• 8/15 Phase 3 – IM Central, Northern, Southern, Western, WKRP</li> <li>• 8/29 Phase 4 – Capital, Great Rivers, Moraine Lakes</li> <li>• 9/12 Phase 5 – Miles/MECA, DMS Main Line, Summer EBT</li> </ul> |                    |             |          |
| Discussion on Callback  | <p>Discussion on callback feature will continue as more information is shared during upcoming subcommittee meetings. Following were discussion points –</p> <ul style="list-style-type: none"> <li>• Desire to be consistent globally.</li> </ul>  |                    |             |          |

|                     |   |  |  |  |
|---------------------|---|--|--|--|
|                     | <ul style="list-style-type: none"> <li>• Subcommittee preference – 1 callback with prerecorded message notifying customer the consortium will attempt 1 callback. If the customer is not reached it would be customer responsibility to call the consortium back.</li> <li>• Callback hours assigned to each queue.</li> <li>• Callbacks would have precedence once they hit their time in the queue. Same way it works now.</li> </ul>   |  |  |  |
| Recording Retention | <p>DHS is researching recording retention policies for MGEP and GCCX platforms. It is unlikely that DHS records will allow indefinite retention of call recordings. Currently all quality recordings are stored on the current platform. Those recordings cannot be moved to the new platform. DHS will soon begin moving recordings to remote state storage. Recordings moved to remote storage will be available by request to the state Help Desk. More recent recordings will remain on the platform.</p> <p>Discussion on whether 30 to 60 days of recordings remaining on the platform would be adequate for QC purposes. The subcommittee preference would be for a much longer period of time, up to a year if possible. Highly doubtful that Security would approve that.</p> <p>Recording retention of GCCX beyond a specific age would be archived. Archived recordings are searchable via the same interface we currently use but retrieval of archived recordings may take 2 to 3 hours. Admins and Supervisor would have access to archived recordings.</p> |  |  |  |
| Next Meeting        | Monday, July 15, 2024 @ 1:00 p.m.   |  |  |  |

**Income Maintenance Subcommittee Key Messages  
Call Center Technical/Operational  
July 15, 2024**

| Agenda Item      | Message/Action/Motion   | Audience/Recipient | Assigned To | Deadline |
|------------------|---|--------------------|-------------|----------|
| Rollout Schedule | <p>The overall project was delayed by 3 weeks to allow for additional testing of features including ATS, and for users to complete training.</p> <p>Phase 3 agents (IM Central, Northern, Southern, Western and WKRP) should log in as soon as possible to avoid overlap with Phase 4 agents (Capital, Great Rivers and Moraine Lakes).</p> |                    |             |          |

|   |  |  |  |  |
|---|--|--|--|--|
|   | <p>All agents will receive a Welcome email from Genesys (<a href="mailto:no-reply@mypurecloud.com">no-reply@mypurecloud.com</a>). The activation link in the email expires after 30 days.</p> <p>Agent IDs will be provided to Phase 4 agents on 7/18/2024. Agent IDs will be provided to Phase 5 agents (MilES/MECA, DMS Main Line and Summer EBT) on 8/1/2024.</p>   |  |  |  |
| <p>Callback Year to Date Statistics</p> | <ul style="list-style-type: none"> <li>• 599,447 callbacks were offered.</li> <li>• 394,706 (66%) callbacks were accepted.</li> <li>• Customers were reached 87% of the time.</li> <li>• 78% of customers were reached on the first attempt.</li> <li>• 21% of customers were reached on the second attempt.</li> <li>• A small percentage of calls require third and fourth attempts if one or more attempts fail because customer phone is not reached.</li> </ul>   |  |  |  |
| <p>Callback Process</p>                 | <p>Currently Genesys GCCX only offers “agent first” callback. When a customer is offered and accepts the callback option, the call is disconnected. When that customer reaches their place in queue, the system calls the next available agent. The system will call the agent’s phone and the agent will receive an alert to “accept” the interaction. After the agent answers, the customer is immediately called. If the customer does not answer, the agent may leave a voicemail for the customer and schedule another callback up to an hour later. This process poses concerns if the customer does not answer on the first callback because during the callback the agent is occupied while not actively engaged with a customer. Requiring the agent to “accept” the interaction to complete the callback is not consistent with how normal inbound calls from the queue are handled.</p> <p>Genesys GCCX has indicated they are implementing a “customer first” callback in phases later this year. In the first phase the customer first callback is provided but only a single attempt will be made. If the customer does not answer and voicemail is detected there is an option to leave a message and disconnect. Additional attempts are not allowed. The second phase would allow for additional attempts.</p> <p>Subcommittee discussed the following options:</p> <ul style="list-style-type: none"> <li>• Deploy with callback as “agent first” and move to “customer first” when it becomes available.</li> <li>• Deploy all consortia and MilES without callback. Implement “customer first” callback when it becomes</li> </ul> |  |  |  |

|              |  |  |  |  |
|--------------|--|--|--|--|
|              | <p>available.</p> <p>Subcommittee was evenly split on the options.</p> <p>Requesting continuity across state.</p> <p>Estimated time agent will be tied up in callback when customer does not answer is 1 to 1 minute 30 seconds.</p> <p>Customers will hear estimated wait time and accurate number of calls ahead of them in the queue.</p> |  |  |  |
| Next meeting | Monday, July 29, 2024 @ 1:00 p.m.  |  |  |  |

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

| Agenda Item | Message/Action/Motion  | Audience/Recipient | Assigned To  | Deadline        |
|-------------|--|--------------------|--|-----------------|
| Callback    | <p>After discussion with local agencies, DHS management, the vendor and the Call Center Operational Subcommittee, the decision was made to postpone the implementation of callback in Genesys Cloud until Customer First callback is available on the platform.</p> <p>The Genesys vendor indicated Customer First callback is scheduled for beta testing this week and currently scheduled for general release in September of this year. Potential release to consortia in October or November. This schedule is subject to change based on the results of testing. DHS will continue to provide updates to consortia on the progress.</p> <p>DHS understands this change will impact the customer experience and create longer wait times for consortia. DHS will reach out to partner agencies to communicate that callback will be temporarily unavailable and our call center performance may be impacted.</p> |                    |  |                 |
| Rollout     | <p>All agents in Phase 3 and 4 rollouts have received a welcome email from Genesys (<a href="mailto:no-reply@mypurecloud.com">no-reply@mypurecloud.com</a>). The activation link in the email expires after 30 days.</p> <p>Agents in Phase 3 (IM Central, Northern, Southern, Western and WKRP) should log in by the end of the week to prevent overlap</p>   |                    | Agents in Phase 3 (IM Central, Northern, Southern, Western and WKRP) should log in by the end of the week. | <b>8/2/2024</b> |

|              |   |  |  |  |
|--------------|---|--|--|--|
|              | <p>with Phase 4 agents (Capital, Great Rivers, Moraine Lakes).</p> <p>Agent IDs were provided to Phase 4 consortia on 7/18/24.</p> <p>Agent IDs are scheduled to be provided to Phase 5 agents on 8/1/24.</p> <p>Logged in times can be tracked in the Cloud under Performance&gt;Workspace&gt;Agent Status. Logged-in statistics provide the total time logged in during the selected time.</p>  |  |  |  |
| Reminders    | <p><b>Agents</b></p> <ul style="list-style-type: none"> <li>• Click “Done” when call and aftercall work has been completed. (User Guide 4.1 and 4.3)</li> <li>• Make outbound calls on behalf of a queue. If you don’t use a queue ATS will not record, and the consortium number will not show on caller ID. (User Guide 4.3)</li> <li>• Click “End” when ATS is completed. If you miss that step the interaction continues to count as handle time and the recording will continue. (Process Help 1.6.4)</li> </ul> <p><b>Admins</b></p> <ul style="list-style-type: none"> <li>• Special Message 1 and 2 flags are no longer available to Local Admins. These will now be set by State Admins. Project Team will work with the business area to determine if the special message is required for GCCX on the first go live day.</li> <li>• High Call Volume flag is no longer available to Local Admins. The High Call Volume message can be triggered by an estimated wait threshold set by queue. The Project Team will work with the local business area to determine the threshold for each inbound queue.</li> <li>• State will set initial call center open and holiday times.</li> <li>• Admins will need to set queues for each agent before go live.</li> <li>• A new “transfer queue” was created and all agents must be assigned to that queue or they will not be able to transfer a call to another queue/agent.</li> </ul> |  | The Project Team will work with the local business area to determine the threshold for each inbound queue. |  |
| Next meeting | Monday, August 12, 2024 @ 1:00 p.m.   |  |  |  |

**Income Maintenance Subcommittee Key Messages  
Elderly, Blind, Disabled/Long Term Care Subcommittee  
July 16, 2024**

| Agenda Item                 | Message/Action/Motion   | Audience/Recipient | Assigned To | Deadline |
|-----------------------------|---|--------------------|-------------|----------|
| August changes to MEH       | <ul style="list-style-type: none"> <li>• Reorganization and clarification of migrant worker policies. These policies will primarily be located in the BC+ Handbook. MEH migrant worker content will be replaced with cross-references to the BC+ Handbook.</li> <li>• U.S. Citizenship and immigration status verification Info from OPS Memo 24-10 updated in handbooks</li> <li>• 16.7.26 Updates to reflect that the age of majority for Uniform Gifts to Minors may be up to 21 years old</li> <li>• 16.7.36 Section added to reflect that Medicare set aside agreements get no special treatment for MA, counted unless otherwise exempt</li> <li>• Update to the IMD list of institutions and definition</li> </ul> |                    |             |          |
| Policy & System changes     | <ul style="list-style-type: none"> <li>• Removal of rule to count income if known and not being received, example 3 in MEH 15.1.5 if they don't receive it we don't count it. Ops memo in progress.</li> <li>• Non spousal family maintenance being tied to 100% of FPL instead of ADRC rules. Ops memo in progress.</li> <li>• KBMA, WWWMA and SC will be processed in CWW</li> </ul>  |                    |             |          |
| Update on LTC overhaul      | One unit to review, hoping to get to external stakeholders in August/September and still targeting release Dec. 2024  |                    |             |          |
| Update on Special Status MA | Looking at different approach to look at these cases, make DAC/503 etc. less confusing. Volunteers requested to look it over and SOLQ update/fix Feb 2025   |                    |             |          |



|                |   |  |  |  |
|----------------|---|--|--|--|
| Future updates | General discussion of some changes/issues that will be address in 2025 CWW updates. |  |  |  |
| Next meeting   | October 15, 2025  |  |  |  |

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

| Agenda Item                 | Message/Action/Motion  | Audience/Recipient  | Assigned To | Deadline |
|-----------------------------|--|---|-------------|----------|
| IM Training Project Updates | <p>Reviewed handout of training updates since 1/22/2024</p> <p><b>1. Updated Training:</b><br/> <u>May (2):</u> EBD MAPP and MAPP<br/> <u>June (17):</u> BC+ Premium Calculations, FS Non-Financial, CM Concepts Change Processing, Inst LTC Eligibility and 3 case scenarios, Deviation, Spousal Impoverishment Income Requirements and 1 scenario, Waiver Divestment scenario, FS Basic Work Rules, FA Clock, FS Work Requirements Interviewing and Exemptions, FS Work Requirement, FS Work Requirement Script Page/Info Letter, FSET NW Training Conclusion<br/> <u>March (2):</u> IM Refresher Training SWICA Discrepancy Resolution and IM Refresher Training FoodShare Residency and Joint Custody<br/> <b>New Training:</b><br/> <u>May (15):</u> Reinstatement of MAPP Premiums, Child Welfare Parent, Genesys Cloud for Agents (10 sections) Genesys Cloud for Sups (3 sections)<br/> <u>June (8):</u> Genesys Cloud for Admin (3 sections) Genesys Cloud Telephonic Signatures, IM Training Course Catalog, FSET Course Catalog, E-Correspondence, Daily Operations Dashboard<br/> <b>Upcoming Training:</b><br/> On-Line FS Replacement Benefits (Sept/Oct), DEAR Project (Sept/Oct) FS ABAWD Updates (Sept/Oct) BRITS (Oct), SEI Updates (Aug/Sept)</p> | Examples: All Income Maintenance Agencies, ESPAC, Operational Leads |             |          |

|  |  |  |  |  |
|--|--|--|--|--|
|  | <p>Special Status Medicaid Refresher (TBD)<br/>         Medical HI Coverage Page Refresher (TBD)<br/>         LTC Learning Library &amp; Advanced Scenarios (TBD)</p> <p><b>2. Genesys Training:</b><br/>         Discussion on ongoing staff and New Worker training needs based upon roll out of each consortia. Cloud call back training will be developed and released based upon launch of this feature in Genesys</p> <p><b>3. Refresher Trainings</b><br/>         DHS staff provided a document and facilitated a discussion of 2 refresher trainings to be released yet this year; Special Status Medicaid and Medical Health Insurance Coverage Page in CWW. These topics were selected based upon state wide need survey completed in early 2024. Consortia representatives requested that the material be shared with local staff for review and feedback. Feedback from local staff/experts should be forwarded directly to DHS by mid August.</p> <p><b>Input/Feedback for Additional Refreshers</b><br/>         The next two refresher training topics will be Burial Assets and Withdrawals from IRAs and Lump Sum Payments. DHS will be soliciting feedback from local agencies on what specifically staff struggle with, topics to be included and specific case example needs. Feedback is requested by the end of August.</p> <p><b>4. LTC Phase 3 Updates</b><br/>         Work continues on phase 3 of the LTC training re-design. Topics and advanced scenarios include; double waiver cases, multiple divestments, trusts, etc. The sub-groupd continues to develop, review and revise the draft material. Publish target date is November/December 2024.</p> <p><b>5. IM Training Feedback</b><br/>         DHS staff continue to work on a more robust way to gather and provide comprehensive feedback to IMAC Training Sub-Committee and consortia partners. DHS continues to work with state data analytics experts and end product is expected by October meeting. State staff presented survey results via PPT from the most recent 3 months of VILT sessions. Participation by new ESS continues to be in the 95% range. Highlights and comments were reviewed which include: enjoyed the varied activities and learning methods, preferred hands on activies, shadowing staff in local</p> |  |  |  |
|--|--|--|--|--|

|  |  |  |  |  |
|--|--|--|--|--|
|  | <p>agencies very beneficial. Enhancement feedback included earlier break, more shadowing opportunities needed, more difficult case examples</p> <p>Local Coach feedback to surveys continues to between 10% - 30%. Feedback included more information available to local support on topics covered, Gaps in KIDS, MAGI rules, FS section needing more time, more individualized feedback on each student. State response has been to create the coarse syllabus, availability of state staff to provide feedback on individual learners when requested and future assessment of FS/BC VILT length.</p> <p>DHS is working on creating a post training survey for learners to complete at a time not immediately following training (ie., 2-6 months later).</p> <p><b>6. Round Table:</b><br/> What strategies are you taking to assist learners with the training? Each consortia shared details on what is done to support new staff during and during the first 6+ months of work. Committee members shared what is done in each local office as well as resources/support completed across county lines.<br/> Highlights include:<br/> Specific workshop topics/curriculum developed during/after VILTS including common topics of budgeting, CS and KIDS, ABAWD and Work Requirements, interviewing, ForwardHealth, SEI, verification, etc<br/> Best practices were shared on shadowing, call center monitoring/support, local QC process and independent confirming and timeframes for increased independence.</p> <p>Round table topic for October meeting will be best practices for contingency plans when learners miss VILTS and/or agency support days.</p> <p><b>7. Walk On Items</b><br/> DHS Training will be sending the quarterly active user report to each consortia to gather local agency Cornerstone users. There is a per user cost for Cornerstone thus agencies are reminded that when staff no longer need IM training to report that employment changes to DHS immediately as part of system end user protocols</p> <p>The 2025 VILT calendar is being finalized and will be announced/published soon.</p> |  |  |  |
|--|--|--|--|--|

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

| Agenda Item         | Message/Action/Motion   | Audience/Recipient | Assigned To           | Deadline |
|---------------------|---|--------------------|-----------------------|----------|
| Intro/Attendance    |   |                    | Ashley Schabel        |          |
| Recap               | May meeting recap. Still drafting extending verification due dates for PH. Most recent 30 days of income at renewal-EVFE was questioned. No new EVFE needed if received in last 30 days and member not reporting a change. This will be added to PH as well.  |                    | Ashley Schabel        |          |
| Policy Check In     | <p>Verif for SEI cases-pend cases-need entire tax packet or just the schedule? Staff are doing it two different ways. Ashley will check with PRT on this one. Per training only require the applicable schedules based on SEI type. Verification request indicates schedules based on SEI type. Or bookkeeping schedule.</p> <p>Worker action needed report for rep type. Feel this is error prone.</p> <p>Difference between policy manual and training on extra TLBs. Handbook still says old rules of after exhaust TLBs have to be working and apply again. training says does not matter if you have a job, can apply anytime verifying you met the requirement. PRT is looking at this conflicting info</p> |                    | Nicole Rolain         |          |
| Consortia reports   | Cases down 100,000 since this time last year. apps about the same as this time last year. Renewals went up drastically Jan-April and now back to measures from last year. Timeliness is improved since last year. call metrics remain steady. Revised rollup report revised 7/17/24   |                    | Donna King via Ashley |          |
| Types of QC reports | Attachment-this was in response to consortia request to help us understand the different types of QCs being done.   |                    | Ashley Schabel        |          |

|                                  |   |  |                 |  |
|----------------------------------|---|--|-----------------|--|
| Utilities Cost Project           | <p>Attachment-sample pull 800 cases. 752 with errors. 48 without errors. 94 were elig errors. 648 technical errors. Most technical due to receiving WHEAP or not receiving it and coded wrong. End month not being updated=664 errors. Most errors occurred at renewal with others at change, app, and SMRF</p> <p>Used case comments to determine errors or ECF docs.</p> <p>Not a best practiced to put \$1 for the amount</p> <p>All utility types were reviewed when \$0 amount</p> <p>Request to see the cases pulled to use as examples for staff-could upload to sharepoint-will share via sharepoint or email. Elig errors were sent through IMQA tool. Technical errors were not sent. Can request technical errors at any time.</p> |  | Valerie Hayes   |  |
| HCQC Error Findings              | <p>AG summary-15 eligibility errors/multiple pins, dual benefits</p> <p>Current demographics-13 living arr codes, 1 currently residing in Wis</p> <p>Employment-13 errors-pay frequency, employment ended, avg hours/pay period, verification, BC+ pretax dedcutions</p>  |  | Angela Stanford |  |
| FSQC Error Findings              | <p>Nov-Feb, Dec increase from Nov, but Jan decreased again, Feb slight increase to 4.78-4.29 is cumulative overall for actives</p> <p>Wages and salaries-math errors, disregarded info, not reported</p> <p>Shelter ded-disregarded or not applied</p> <p>Other unearned income-not reported</p> <p>Self employment-not reported or not applied</p> <p>15.76% cumulative negative error rate</p> <p>Notices 40.82%</p> <p>Verification</p> <p>Wages and Salaries</p>  |  | Dione Sanders   |  |
| Roundtable: Interview Strategies | <p>Western sent call center script they are using-list of topics with hyperlinks-will be shared after the meeting</p> <p>IM Central-consortia wide meeting once the interviews return to make sure everyone has refreshed info.</p> <p>MILES will do additional refresher training for staff in app and renewal training queues. Supervisors will get together to plan for end of unwinding and come up with</p>  |  | Nicole Rolain   |  |

|                     |  |  |                |  |
|---------------------|--|--|----------------|--|
|                     | <p>a plan of action for training and other actions needed for staff to be successful.</p> <p>Bay Lakes-August time carved out to review with staff – understand that some staff have only been doing this with the waived interview</p> <p>Capital-same as Bay Lakes</p> <p>Moraine Lakes-same-refresher training</p>  |  |                |  |
| Future Agenda Items | <p>Requested ideas from the group-can be sent to Ann or Nicole or Ashley or Molly. Next meeting 9/18/24</p> <p>Avoidance</p> <p>Discussion of what consortia do during down time-waiting for a call, etc. What practices are in place?</p> <p>How do consortia manage the work of alerts?</p> <p>Rock county has everyone work them 1<sup>st</sup> 30 minutes of day. 8:30 move into daily duties.</p> <p>LaTanya Fiscal year active pmt error rate 5.15%</p> <p>CAPERS 21.84 % National avg is 44.52 % no sanctions or liabilities for 2023-kudos to the staff doing the hard work!</p> |  | Ashley Schabel |  |