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INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

November 21, 2024
1:00 – 3:30 p.m.
Zoom Link: https://dhswi.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/John Rathman
1:05 PM	Approval of October 17, 2024, Meeting Minutes (Attachment)	Katie Sepnieski
1:05 – 1:20 PM	Department of Health Services Policy Updates	DHS Policy
1:20 – 1:40 PM	Subcommittee Updates (Attachment) • Income Maintenance Operational Analysis • Call Center Technical/Operational • Training • Fraud & Program Integrity • Performance Monitoring (Not presenting) • Elderly, Blind, Disabled/Long Term Care (Not Presenting)	John Rathman Kris Weden Mitch Birkey/Shelby Jensen Robert Klingforth
1:40 - 2:40 PM	Benefit Recovery Investigation Tracking System Update (BRITS) (Attachment)	April Ferstl
2:40 – 3:10 PM	Management Evaluation Review (Attachment)	Molly Thomas
3:10 – 3:15 PM	Income Maintenance (IM) Funding and Contract Updates	Alicia Grulke/ John Rathman
3:15 – 3:20 PM	Consortia Feedback: IM consortia will share feedback with DHS	John Rathman
3:20 – 3:25 PM	Administrative Memos	Alicia Grulke/ John Rathman
3:25 – 3:30 PM	Regional Enrollment Network	Lorie Graff
3:30 PM	Public Comment	All
3:30 PM	Announcements/Future Agenda Items	All

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Income Maintenance Subcommittee Key Messages
IMOA
November 1, 2024

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
DHS Policy Updates	Katie Sepnieski welcomed everyone to the meeting. Autumn Arnold introduced the policy updates section of the meeting and informed members that DHS is still working on MAPP premium payment topics for the future but don't have any specific MAPP program updates to present today. Elizabeth Berkelman highlighted that the annual operations memos on COLA increases and benefit levels will be published soon. Elizabeth also highlighted that DACA children are now eligible for Marketplace coverage effective 11/1/24 and can get tax credits. This coverage can start as soon as December 1st. Leah Watson highlighted some items on the new three month clock resets for AWABD participants of Foodshare. The new clocks will reset as of 1/1/25. Participants who had lost coverage due to using all three months under their existing clocks will need to reply for the program. Extensive outreach will be done to alert participants and IM workers about the clock resets. No new operations memo will be published on this topic as there is no policy change. Warning letters for participants potentially losing Foodshare eligibility in November and December will be suspended so confusion does not occur to participants given the clock resets on 1/1/25. Jodi Noble informed IMOA members that Kaydee Beckett system errors are in the process of being corrected. Kaydee Becket cases with continued errors should be submitted for review. CDPU has had some issues with returned mail and some of the documents agencies may be seeing may be extending longer than the normal 10 days. Concerns were raised by Great Rivers, Moraine Lakes, and East Central about MAPP case questions to Gainwell and how agencies can best help clients fix and correct the complex issues that are occurring with client's MAPP payments. It was recommended that these type of issues be emailed to PRT (problem resolution ticket) with a request to escalate to Jodi Noble. Northern asked if MAPP or MAPP Premium could be a problem criteria selection choice for the PRT submission. LaTanya Taylor reported that the October consortium data report will come out a week earlier than anticipated and will be published on November 11th.	IMOA Members	On-Going	

2025 IMOA Charter Review	Alicia Grulke reviewed the 2025 IMOA charter with IMOA members. Alicia highlighted the 2025 goals identified for IMOA including specific initiatives focused on Genesys Cloud implementation, the Unclear Rule, developing the diversity, equity and inclusion implementation plan from the 2024 assessment, and a focus on member notices and communications. Alicia said any feedback could be submitted to herself or the tri-chairs.	IMOA Members	On-Going	
W2 Update	Patara Horn, the Director of Working Families for DCF, updated IMOA members that due to technical errors in the scoring of the recent RFP for W-2 services, DCF is requesting that the Governor approve the extension of the current contracts by one additional year (through 12/31/25). It is anticipated that the RFP will be updated and reissued in January of 2025. The new contracts would now start on 1/1/26. Providers for the next contract period would be released in the summer of 2025. Patara will return to IMOA with future updates on the W-2 RFP. Moraine Lakes questioned if some of the vendors for W-2 wanted to try to integrate IM back into W-2. Patara said this may be an approach some W-2 vendors might be taking, but that counties definitely had the ability to say "no" to these requests if it wasn't operationally feasible.	IMOA Members	On-Going	
Administrative Renewal Reports	Shawn Thomas reviewed Individual Level Administrative Renewals with IMOA members. In August of 2023, CMS issued guidance that states complete individual renewals rather than at a household level. In February of 2025, CARES changes will occur so that renewals previously completed at a household level will now be completed at an individual level. Shawn highlighted the three reports that will be impacted by the changes contained in this project including; (1) Health Care Administrative Renewals Process Monitoring Report, (2) Renewals Monitoring Report, and (3) Cases Due for Renewal by Renewal Status. Reports were reviewed to show what the current report looks like and then what the report will look like after the change. Several new views will also become available now that we have data at the individual level. Shawn asked for some feedback from members on how to best deal with cases that are only partially administratively renewed. Consortia members recommended that a new metric be created to show how many cases are partially administratively renewed so an agency can get an idea of how many cases will require follow-up actions. Consortia requested an efficient option to drill down and get a list of those cases that will require follow-up actions. Additional feedback on these reports can be submitted to Shawn in the next two weeks.	IMOA Members	On-Going	

OIG Update	LaTanya Taylor reported on a recent FNS review of our SNAP Program. While final results of this review still need to be received, FNS did raise concerns about the possibility of internal fraud in the program. LaTanya reviewed written guidelines that state that any possible staff fraud in the program must be referred to OIG. Agencies are asked to review this procedure with all of their staff members within 30 days and that agencies submit in writing that this review was completed. Candice Canales thanked all of the agencies that assisted with the recent FNS audit and review and with the timely completion of this training. Consortium members asked for a communication on what information counties can get about systems use and access by their staff members. Candice also updated members on the mass PIN project. DHS can now systematically remove the PIN numbers on one or multiple Foodshare cards. The card is then unusable until a new PIN number is established which can be done 24 hours a day. If a participant's card is unpinned, they will receive a text message and will also be sent a letter from DHS. A CCN on this topic was released yesterday. Case comments on the unpinning actions are also put into the impacted cases.	IMOA Members	On-Going	
Genesys Update	Alicia Grulke informed IMOA members that a solution to the lead line issue is being worked on for agencies who do use those. New lines had to be requested from the telephone vendor. All lines of business has now been moved to the Genesys cloud version of the software.	IMOA Members	On-Going	
SWICA Workload Discussion	Katie Sepnieski encouraged agencies to share issues, feedback and concerns about the current SWICA workload. Agencies highlighted that the SWICA matches that agencies get about certain populations (example kids) often cannot be changed so could those matches be filtered out as income changes wouldn't impact eligibility. Craig Hayes said they would take this suggestion back and discuss further. Craig also clarified that even though the SWICA matches are only for healthcare in nature, if information that is obtained also impacts the Foodshare program, we would act on those changes as well. Craig also highlighted that CMS still requires that the matches occur and get worked but could the frequency of the matches be reviewed. IMOA members also inquired if the matches could be worked more electronically and involve fewer worker efforts.	IMOA Members	On-Going	
Future Agenda Items/Next Meeting Date	Agenda items for our next IMOA Meeting include; Policy updates, Genesys updates, and a Discussion on Self-Employment. The next IMOA meeting will take place on *Friday, December 6th*.	IMOA Members/DHS Staff	*December 6, 2024*	

Income Maintenance Subcommittee Key Messages
Call Center Operational Technical Subcommittee
October 14, 2024

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Rollout Update	• Phase 3 users (IM Central, Southern and WKRP) successfully transitioned to GCCX the evening of 10/10/24. • Phase 5 users (Capital, MilES/MECA, DMS Main Line and Summer EBT) should log into the platform the week of 10/14/24. • Each phase will have a "touch base" meeting scheduled the week of their cutover date. This meeting will include a review of the Admin Functionalities of assigning agents to queues and business events. Time permitting, we will also touch on reporting. The meeting will be recorded for those who cannot attend. • A bridge will be created for each phase on the first day taking calls in GCCX. The bridge will be used in the event there are major issues affecting the call centers in each phase and for periodic updates throughout the day.			
Secondary Status Reporting	A recent update to the **Genesys Cloud Agent Status View** gives supervisors the ability to see how long an agent was in a particular **Busy** secondary status. To add this column to the **Agent Status View**: • Click on the "+" • Next to the "**Busy**" option click on the triangle to reveal the secondary busy statuses: *** Application Processing** *** Technical Issues** *** Supervising** *** Extended After Call Work** These columns give supervisors a historical view of how long an agent was in a specific secondary status. Supervisors can still see how long an agent has currently been in a specific secondary status by viewing the "**Time in Status**" in the same view.			

MGEP Recording Retention	The process to sync MGEP recordings with state storage had begun. The current plan is to move MGEP recordings older than 90 days to State storage. State storage will be accessible by State Admins. Recordings can be requested via a State Help Desk ticket.			
Training and Handbook Enhancements	Enhancements will be made to the User Guide on a regular schedule, 3 times per year. IM Training is on a separate schedule so training updates will come out at a different time than the User Guide updates. This subcommittee will be used to gather feedback on possible edits and additions to both of those mediums. A list of enhancements and training has already been created and includes the following items: • Expanding the interaction tab • ATS instructions in User Guide • Agent Status definitions in live reporting • Information provided when searching for agent • Password strength • Training call flow • Account activation and first-time logging in • Agent queue statistics • Report expiration and renewal • Remind agents not to add phone numbers to their profile • Add prioritization and turn around expectations to user guide • Queue transfer process • Add troubleshooting section to the new Genesys User Guide, including information on opening a ticket • Internal calls/transfers to agents in available verses busy status • Secondary status historical reporting			
Next Meeting	Monday, October 28. 2024 @ 1:00 p.m.			

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Callback	The Genesys Project Team has received a demo of the customer first callback feature. In general, the customer and agent experience appear to be similar to what we had in MGEP. The callback rollout will occur in phases with rollout hopefully beginning the end of November or beginning of December. The rollout will not use the same phases that were used for the GCCX rollout.			
GCCX rollout	GCCX rollout has been completed. Phase 5 rollout was split to allow more time for testing. Capital and Summer EBT rolled out 10/24/24 and MilES/MECA and DMS main line rolled out 10/29/24.			
GCCX System Issues	• Post Dial Delay – calls taking longer to ring to the agent's phone. - In some cases, the carrier has been able to make a route change as a troubleshooting measure. - In other cases, updating Alert Time on the queue has been helpful in decreasing this issue. The amount of time a call rings to an agent can be updated at the queue level. This cannot be updated at the agent level. If the Alert Time is updated at the queue, all agents will be affected by the change resulting in a greater risk that more calls could go to an agent's voicemail. If you want to update the Alert Time a ticket should be sent to the WI Help Desk. Callers are not aware that their call was missed, they just go back into the queue. Agencies can try increasing the time locally for computer soft phones. • Outbound calls – we have received some reports of agents unable to make an outbound call on behalf of a queue. The Project Team and vendor continue to troubleshoot this issue to determine the root cause. • Lead Line – an update has been made to the lead line process for all consortia. An external toll-free number has been created for each lead line. Agents will need to conference, consult, or transfer to this new number. The system will still prevent the agent from attempting a consult when they are already involved in a conference. This is a system restriction that cannot be updated.			

	External contact for each lead line has been created. Agents may use external contact or dial the toll free direct. All previously created lead line external contacts have been deleted. ***IMPORTANT: The newly created external contact is not "division aware" which means agents will be able to see the lead line contact for all other consortia. It is important that agents select the correct lead line for their consortium.*** • ATS File transfer issues – DHS has identified the issue and potential solution to the increase in cases on the Telephonic Mismatch Report. Once the solution has been implemented the Telephonic Mismatch Report will be rerun from 10/24/2024 to current and any recordings that are stored in ECF will be removed from the report. Once that is completed DHS will notify agencies of the correction and confirm that agencies can commence working the report from 10/24/2024 forward.			
MGEP Decommissioning	• The Genesys platform has been decommissioned. • MGEP recordings have been transferred to a separate container that will be accessible by DHS staff only. The timeline for accessing those recordings is yet to be determined. Consortia needing a recording from MGEP should send in a request via the WI Help Desk. Requests should be made by Supervisors or Administrators only.			
Next Meeting	Monday, November 25, 2024 @ 1:00 p.m.			

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline

IM Training Project Updates	- August – A new training was published on PINS and Clearance.
	- September 2024 there were updates to existing trainings including:
	   o FSET overview
	   o Food Share clock, work requirements, basic work rules, and Food Share work requirement, interviewing and exemptions.
	- October 2024 there were updates to several existing trainings including:
	   o Badger Care Plus: Ongoing and extensions
	   o Food Share: Non-Financial, changes, SMRF and renewals
	   o Case Maintenance Concepts: Notices
	   o Continuous Health Care Coverage for Children
	   o Elderly Blind Disabled Medicaid – Overview, Financial, Benefits, MAPP, Ongoing
	- October 2024 there were new trainings published included:
	   o Food Share replacement and 36-month Certification Period (DEAR0
	   o Katie Beckett Medicaid
	- Trainings were removed from Cornerstone: COVID Unwinding: Ending Continuous Health Care Coverage and Reinstatement of Health Care renewals and Policy Changes to Badger Plus for Childless Adults and Q&As
	- Upcoming Trainings include:
	   o BRITS (November 2024)
	   o LTC Learning Library and Advanced Scenarios (November 2024)
	   o Self-Employment Updates (November/December 2024)
	   o Medical Coverage Page Refresher (December 2024)			

	o Medical Expenses for Food Share Refresher (December 2024) o Special Statuses Refresher (TBD)			

Refresher Trainings	- Some updated refresher trainings are up and coming.
	- The trainings are focusing on identified worker struggles. The trainings will also include specific examples of such struggles.
	1. Burial Asset Training
	  o Identified worker struggles included:
	     ▪ Identified irrevocable burial trusts, burial insurance, life insurance
	     ▪ Burial funds policy
	     ▪ What to enter in the burial asset fields and types of verification
	     ▪ Burial assets and divestment
	     ▪ Difference between collateral assignment versus irrevocable assignment
	     ▪ Deciphering documents and identifying burial asset verifications
	  o The topics to be covered in the refresher training will include:
	     ▪ How to identify verifications and what they need to include
	     ▪ Examples of how to distinguish different burial assets
	     ▪ Flow chart to determine types of burial asset verifications
	     ▪ How to calculate out burial spaces for irrevocable burial trusts
	  o Some specific examples:
	     ▪ How each burial asset should be entered on the asset pages and their appropriate values
	     ▪ What to look for on the verifications and when they need to be reverified
	     ▪ Examples of documentation from a funeral home			

	- Existing LIP to a funeral home. (revocable and irrevocable) - CDs set up to fund a funeral that is irrevocably assigned. What about the interest and when the member adds funds per the contract - Members setting up a funeral fund for an adult child - Estate needs to be the beneficiary 2. IRAs and Lump Sum Payments o Identified worker struggles included: - When to count and disregard payments - When withdrawals are counted as income versus an asset - Differences between IRAs and employer accounts - IRA accounts that are annuitants, mutual funds, etc. o Some specific examples will include: - Members that make withdrawals in the year prior and don't know if there will be other withdrawals - What to do when withdrawals are done quarterly vs. yearly vs undecided 3. Special Status Medicaid 4. Medical Coverage a. Currently being designed 5. Medical Expenses for Food Share a. To be released in December 2024 b. It will include the impacts of DEAR 6. Quality Control Overview a. Training is being enhanced. January 2025 the committee with revisit the prioritization lists and have a conversation again on what is next.			
Long Term Care-Phase 3 Update	- Team is currently developing curriculum content - Advanced scenarios and Learning Library topics to be published on November 27th			

	- Advanced scenarios exampled include institutional children, promissory note, institution transfer, divestment, double waivers and more - Learning Library topics coming are medical spenddown, effective dates and institution transfer			

Feedback and Post Training Survey	***From the Learners***
	- 100% of Learners completed the New Worker survey for June and August. 84% in July.
	- 88% of learners completed the EBD Workshop survey for June, 80% in July and %90% in August.
	- June, July and August learners either strongly agreed or agreed that the VILTS sessions frequently provided opportunities to actively engage in learning with others.
	- June, July and August learners for the most part strongly agreed or agreed that their local coaches/agency provided them with opportunities to job shadow and practice concepts they learned during the training with my agency.
	- Some of the comments from learners included:
	    o In find shadowing – especially the call center, so helpful. I started shadowing in conjunction with the VILT, but I think that it would have helped to have shadowed a week of two leading up to the VILT. It should have provided context.
	    o My co-worker and the lead especially are not here a lot to help me when I have questions, or I get stuck so that part is frustrating.
	    o I would like to shadow more.
	    o I would have liked more "fake cases" and activities. It looked like other classmates had a lot of extra activity and we did not, aside from real cases.
	    o I wish I would have been given more opportunities to shadow phone calls throughout the process.
	- Additional learner feedback included:
	    o What really helped was the games and activities.
	    o I think it would be better to spread out the COHORTS to M-W-F. It feels a little too much to have them squeezed together on M-T-W.			

	○ Some areas felt slow and other felt fast. Some breakout rooms were fine, others I felt were pointless. I enjoyed the whiteboards and KAHOOT. ○ I would say is that there were items that CWW does automatically for us, like assistance groups, that I felt could have used a little less time than we did. ○ Coaches and instructors are fast responding, active and engaging. ○ The only thing I wish we had more of was interviewing techniques. ***From the Local Coaches*** - 8% of Local Coaches completed the New Worker survey for June., 23% for July and 13% for August. - 20% of Local Coaches completed the EBD Workshop survey for June, 11% in July and 8% in August. - There were mixed reviews from Local Coaches regarding communication information during the training. Some coaches found the communication very effective while some found is neither effective nor ineffective. - Comments received from a local coaches found that the weekly notices were helpful. Another comment found communication effective however wished they got more than just a progress report of what was completed but a full picture of what was gone over. - Training gaps identified by local coaches were: ○ When workers left the training, they still don't feel like they can process an application or understand what is going on. ○ Food Share and Health Care should be longer than 3 days. - DHS continues to focus on complexity of cases, additional hands-on opportunities, enhanced focus on interviewing, and evaluation of break out sessions based on the feedback received. - NEW: Leaners will be surveyed at 3 months post training completion to help identify gaps and additional training needs. The first of these survey's is going out in			

	November. July COHORT will be the first COHORT to get this.			
New Worker Updates	November 2024 adding a CWW overview demonstration to the prerequisites to the COHORT. Training announcement to be coming out. This demo is 40 minutes in length and with cover navigation, the driver flow and the application process. January 2025, there will be updates to the Child Support overview training. Along with two additional Learning Library topics: FDSH wages and Break in Service.			
2025 Charter and Goals	Charter and goals have been finalized. Participation in the group has increased. Thank you.			
Annual Training Attestation	As a reminder, training attestations are due to the IM Training by January 11th, 2025.			
Training Roundtable – What does your agency do to satisfy the cultural competency training requirements.	Many of the Consortia/Counties continue to rely on the training in Cornerstone or what is provided within their individual counties. It was also noted that some do just the required yearly training. Others have quarterly trainings/presentations. It was reported by some that they have a list of TED talks that workers can completed. Capital reported that they call on a representative(s) within their Consortia to lead a presentation(s). They have found this very successful. Northern uses the CBT, but also put out a quarterly newsletter. MiLES in the past had a committee that would develop topics and do presentations.			
Walk On Items	Reminder to agencies to make sure to complete the registration form for the COHORT sign up. Try to put in your request 2 weeks prior and be sure to enter the correct start date. The start date triggers the email to the new worker with the curriculum in Cornerstone.			
Topics in January	Refresher training – Immigrant and Refugees Fraud training request			