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**INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)**

**Thursday, September 19, 2019**

**1:00 – 3:30 p.m.**

**Dane County Job Center, 1801 Aberg Avenue - Ballroom, Madison, WI 53704**

**Or online at <https://connect.wisconsin.gov/imac/>**

**For audio, dial 877-820-7831, access code 361278**

**AGENDA**

1. Administrative Issues – Debbie Waite & Claribel Camacho
2. Approval of August 22, 2019 Meeting Minutes Debbie Waite
3. Security Updates Carla Treuthardt
4. Policy Updates
  - a) 1115 Waiver Update Rebecca McAtee
  - b) ABAWD Geo Waiver Project (Attachment) Katie Vieira
5. CARES Call Center (Attachment) Becky David
6. Subcommittee Updates-  
(Attachments)
  - IMOA John Rathman
  - Program Coordination Lorie Graff
  - FPIP Margaret Romens
  - Call Center Kris Weden
7. Regional Enrollment Network (REN) Update – John Rathman
8. Income Maintenance (IM) Funding & Contract Updates - Debbie Waite/John Rathman
9. Consortia Feedback – Claribel Camacho
10. Administrative Memos – Debbie Waite
11. Miscellaneous Updates / Other / Public Comment
  - a) Gap Fill Chart (Attachment)

## 12. October 2019 and Future Meetings - Tentative Agenda Topics

- a) Open Enrollment Overview
- b) 1115 Waiver & DHS 38 Update
- c) Policy Update

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\*If you want to participate by web meeting, you can follow along at your computer by logging into <https://connect.wisconsin.gov/imac/> as a guest 5 minutes ahead of time and calling the above conference line for the audio.

**PAC DECISION POINTS AND KEY MESSAGES**

**IMAC FPIP**

**8/27/19, 9:30 a.m. - 10:30 a.m.**

<b>Agenda Item</b>	<b>Message/Action/Motion</b>	<b>Audience/Recipient</b>	<b>Assigned To</b>	<b>Deadline</b>
OIG Position Changes Wendy Metcalf	<b>Agenda Item</b> Wendy has been promoted to FIRE chief. The two OIG manager positions are vacant. Interviews have been completed and they are in final stages of hiring. Announcements should be coming out soon. WIC manager position will posted soon. Should be able to be full time but posted as .8 <b>Action Items:</b> Wendy will send e-mail announcing new managers. <b>Investigation &amp; Technical Assistance Manager – Tami Tolliver</b> <b>PARIS and Trafficking Manager - Candice Canales</b>	FPIP Members	Wendy	N/A
ADH Waiver requirements reminder Wendy Metcalf	<b>Agenda Item</b> Waiver form has 2 check boxes. Fed regulations state that you CAN check one of boxes but our form says you MUST check a box. Feds have given direction that one of the boxes needs to checked in order to impose sanction.  Wendy has asked FNS that if we have signature, can we call and ask if they want to check one of the boxes. Wendy is waiting for a response.  <b>Action:</b> Wendy will give answer to question about signed form without a box checked <b>Melissa Washington responded with – yes we can call, get their choice and check the box, initial it and make case comments in CWW. If no contact, the IPV has to be reversed and you’ll need to take it to an ADH hearing. The signed waiver will be a strong piece of evidence.</b>	FPIP members	Wendy	N/A
Metrics Changes	<b>Agenda Item</b>	FPIP members		

Wendy Metcalf	<p>2.3 million in overpayments calculated-highest month in 2019. 1.8 million of benefits saved/cost avoidance across the state which is also the highest month.  2100 investigation in July  48 IPV</p> <p><b>Action:</b> Wendy will send out metrics and IPV Map</p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">   FW Emailing  JUL2019 Jan-Jul2019. </div> <div style="text-align: center;">   PerformanceMetricsR  eport (5) pdf.msg </div> </div>		Wendy	N/A
FPIP Admin Progress Report, 2019/2020  Wendy Metcalf	<p><b>Agenda Item</b>  Extra 500,000 in 2019-WICSA said counties would only want the funding if it could be available to the agencies by 9/11/19. Wendy thinks it is possible. The additional funding is circling through the approval process along with the 2020 FPIP funding Admin Memo. Hopefully both will be out soon. Wendy isn't expecting changes to the Admin Memo except for dollar amounts. 2 million has been allocated for the balance state for 2020.</p>	FPIP members		
Traffic and PARIS updates  Wendy Metcalf	<p><b>Agenda Item</b>  Trafficking: Wal-Mart and Krueger will no longer give video without subpoena. Kitty had given OIG the authority to issue subpoenas. Since her passing, they no longer have the authority. Wendy knows that some counties are issuing their own subpoenas.</p> <p>PARIS-Wendy will be meeting with data people regarding cleaning up files.</p>	FPIP members		
Vine link – FNS  Wendy Metcalf	<p><b>Agenda Item</b>  Some people using vine-link alone as verification alone. It is a tool to give direction but you need to follow up for other verification. Per FNS, it cannot be sole reason you took action on a case.</p> <p><b>Agencies can continue doing business with Vinelink as usual until and if, DHS is required to make changes.</b></p>	FPIP members		

<p>FNS Integrity Review – July</p> <p>Wendy Metcalf</p>	<p><b>Agenda Item – Informational Only</b></p> <p>Melissa Washington and Wendy’s first FNS Integrity Review occurred in July. Dodge County was the county they visited. Wendy has not received resulting write up yet. This was the first time they completed data module review. State will just need to do some cleaning up of data. Craig Hayes was the policy person that worked with them. He isn’t waiting for the write up to start researching. Currently ALJ quote federal regulations in write up but not in conclusion. Fed regulations state they need to be in the conclusion.</p> <p>PACU potential finding: When there is a OP fair hearing and collection activities are holding, PACU should notify client when collection efforts resume. It is irrelevant if the amount changes or not.</p> <p>Melissa and Wendy thought the review went well.</p>	<p>FPIP members</p>		
<p>WAPAF Training Reminder</p> <p>Margaret Romens</p>	<p><b>Agenda Item</b></p> <p>WAPAF training is being held 10/1/19. The OIG is providing investigator training.</p> <p><b>Action:</b> Let Margaret know if you would like a copy of the training announcement.</p>	<p>FPIP members</p>	<p>FPIP members</p>	<p>N/A</p>
<p>BRITS Update</p> <p>Theresa Fosbinder</p>	<p><b>Agenda Item</b></p> <p>Theresa did not attend the meeting.</p> <p>Thursday a Change Agent meeting is being held.</p> <p>Margaret reported that Kim Brown from BI-BRITS came to Dane County to see BRITS from local agency investigator prospective. She plans to come in the future to see overpayment prospective.</p>	<p>FPIP members</p>		
<p>Walk on items</p>	<p><b>Agenda Item</b></p> <p>OIG is developing a 3 day investigator training. Sessions will be held in the spring and fall of 2020. There will be a demonstration of EBT edge including what to grab, when to grab etc. They completed a first dry. A Website with OIG forms uses is being created. They will need assistance agencies for training space.</p>	<p>FPIP Members</p>		

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	<b>Action Item:</b> Committee members should bring count of potential training attendees to our next meeting		FPIP Members	11/12/19
Next Meeting 11/12/19 from 9:30-11:30	Agenda Topics: Investigator Training Update			

**Income Maintenance Subcommittee Key Messages**  
**IMOA**  
**September 6, 2019**

<b>Agenda Item</b>	<b>Message/Action/Motion</b>	<b>Audience/Recipient</b>	<b>Guiding Principle(s)</b>	<b>Assigned To</b>	<b>Deadline</b>
Policy Updates	<p><b>COMMUNICATION:</b></p> <p>Marlia Mattke shared updates on the 1115 Medicaid Waiver that was approved by CMS on 10/31/2018. Act 370 requires DHS to implement the waiver. Marlia reviewed very high level components of the waiver including the new requirements of community engagement, premiums, 48 month time limits, and health risk assessments (one mandatory – healthy behavior and one optional that will help Medicaid participant’s lower premiums. Marlia also shared how the new emergency room co-payment would work when the emergency room is used for non-life-threatening conditions and also briefly discussed the new AODA residential benefit included in the 1115 Waiver.</p> <p>Marlia highlighted that a communications and outreach plan has been designed to educate advocates and IM workers about the new waiver. A Forward Health Update and a one-time letter to all existing impacted Medicaid users (roughly 150,000 members) will be forthcoming.</p> <p>Rebecca McAtee also provided updates on SSI cases that are ending that will need to manually be reviewed for eligibility (roughly 500-800 cases) and on a new</p>	All IM Consortia		Consortia and DHS Staff	<p><b>Consortia should send 1115 Medicaid questions to Marlia over the next few weeks.</b></p> <p><b>This will be an agenda item at IMOA and IMAC meetings for the next few months.</b></p>

	<p>ABAWD Geographic Waiver for Foodshare that will impact 6 counties (Ashland, Bayfield, Iron, Adams, Forest and Menominee) starting October 1<sup>st</sup>.</p> <p><b>ACTIONS:</b> Consortia are encouraged to continue to send in questions about implementation as Marlia said those questions are helpful to the planning process.</p>				
<p>CARES Program Updates</p>	<p><b>COMMUNICATIONS:</b></p> <p>Shayla Frinks and Leslie Rozeff from Deloitte Consulting reviewed the work plan for the Training Modernization project with IMOA members. They spoke with DHS staff and 5 different consortia. They also research 4 other states that were similar to our model including Colorado, Minnesota, North Carolina and Idaho. A follow up phone call is scheduled with Idaho staff and with our training committee specializing on modernization on September 18<sup>th</sup>.</p> <p>Focus group results were shared highlighting three main areas:</p> <p><i>Training Content</i> – is too technical, has too much information, includes too much reading, and our written materials are often inconsistent and outdates. The training cases used are not realistic.</p> <p><i>Learners Success</i> – workers return on what they remember from training is low, workers feel overwhelmed and learners state they need different types of learning not all readying.</p>	<p>All Income Maintenance Agencies</p>		<p>IMOA</p>	<p><b>Shayla and Leslie will return to the October 4<sup>th</sup> IMOA Meeting with Further updates</b></p>



	<p><i>Training and Leadership Support</i> – Feedback is not immediate, instructor responses are often contradictory, and there is overall a lack of positive support.</p>				
<p>CARES Project Updates</p>	<p><b>COMMUNICATION</b></p> <p>Autumn Arnold reviewed three CARES Projects with the IMOA membership:</p> <p><i>Active Case Report</i>- Roughly 2-3% of the CARES open caseload has no active program associated with it. The plan will be to remove this cases at the end of this calendar year to get accurate active cases on our dashboards in 2020.</p> <p><i>Electronic Residency Verification Update</i> - Autumn reported that they did make changes to the PSG contract effective August 1, 2019 to hopefully reduce the number of matches we receive each month. Changes include eliminating matches with no new information, restricting the timeframe of data to only include one to years of backdated history, and a change to the number of months the report will cover. Consortia should monitor their monthly reports to see if matches reduce in the future.</p> <p><i>EBD Med Needy Update</i> - Changes went into effect 8/1/2019. There are 5,000 QMB participants that need to get a letter. Consortia elected to send these after the MAPP participants get their letters in early October. There are 7,000 MAPP participants that also will</p>	<p>All Income Maintenance Agencies</p>		<p>Consortia</p>	<p><b>Future updates and discussions of the projects will be scheduled for IMOA meetings</b></p>

	receive letters.				
Program Updates	<p><b>COMMUNICATION:</b></p> <p><i>WORK NUMBER:</i> IMOA members discussed that some counties still have Work Number Access and those that don't have found ways to implement manual work arounds. Rebecca McAtee might have further updates about national discussions connected to the Work Number.</p> <p><i>Midstate Technical College Updates</i> – Final agreements with Mid-State are being finalized and the training subcommittee will meet in October to discuss new soft skills training. The new training will be available on the Learning Center. The Recruitment video is being consider for students to work on during the spring 2020 semester.</p> <p><i>Discrepancies</i> – SWICA discrepancies are supposed to be resolved with 45 days of receiving per Federal requirements. Currently we receive too many to get done in this timeframe. A workgroup made up of members from BEPS, MILES, DCF, and OIG have been meeting to identify solutions to reduce the number of discrepancies we receive.</p> <p>6 of the 21 solutions have been initially selected to be implemented in May of 2020. These changes will include:</p> <p>A. Matches will be generated sooner</p>	All Income Maintenance Agencies		DHS/Consortia	<p><b>Future discussions will continue on all of these topics.</b></p> <p><b>Consider a formal LEAN project on discrepancies.</b></p>

	<ul style="list-style-type: none"> <li>B. IM cases will no longer have the 2<sup>nd</sup> tolerance test</li> <li>C. Eliminate cases that are required to have matches run</li> <li>D. Provide additional IM worker training</li> <li>E. Change Child Care/W-2 discrepancies to match new Block Grant rules</li> <li>F. Automate the sending of EVFE</li> <li>G. Make discrepancies more understandable</li> <li>H. Auto pending of cases – auto sending of verifications needed</li> </ul>				
JIRA Prioritization	<p><b>COMMUNICATION:</b> Claribel Camacho provided updates on our most recent JIRA Prioritization process. Challenges that were encountered included that there really wasn't enough time for all consortia to properly poll and prioritize the projects (short staffed, summer vacations, other workloads) and that the present system doesn't allow consortia to vote on new JIRA items submitted by any one of the 11 consortia (includes MILES).</p> <p><b>ACTION:</b> Will research technology solutions that could automate this on-going prioritization process and allow consortia to see new projects being submitted at the time of prioritization.</p>	All Income Maintenance Agencies		Consortia Members and DHS Staff	<b>Increase time for prioritization of JIRA items and research technology solutions for this process</b>
Pre-certification of Foodshare Cases	<p><b>COMMUNICATION:</b> In August we reviewed 1143 cases, an increase from the 971 reviewed in July. While improved, some staff are still not using the drop down menus that have to be used for the case to be</p>	All Income Maintenance Agencies		DHS Staff	<b>IMOA will discuss again at their October 4<sup>th</sup></b>

	<p>included in our numbers. Some agencies are designing training for their staff based on the results of these pre-certifications.</p> <p><b>ACTION:</b> Consortia will continue to pre-certify cases for September. Project will be evaluated for the future. Long-term CARES will be updated to require pre-certification on certain cases meeting predefined thresholds.</p>				<p><b>meeting</b></p>
<p>Next Meeting</p>	<p>The next meeting will take place on Friday, October 4<sup>th</sup>. IMOA members also agreed to keep their Friday, December 6<sup>th</sup> IMOA meeting but to hold that meeting in Stevens Point since the WCHSA fall conference will be in Wausau on December 4<sup>th</sup> and 5<sup>th</sup>.</p>				<p><b>Next Meeting is Friday, October 4<sup>th</sup> in Stevens Point.</b></p>

**PAC DECISION POINTS AND KEY MESSAGES**  
**Call Center Operational/Technical Workgroup**  
**September 9, 2019, 1:00 PM**

<b>Agenda Item</b>	<b>Message/Action/Motion</b>	<b>Audience/Recipient</b>	<b>Guiding Principle(s)</b>	<b>Assigned To</b>	<b>Deadline</b>
Completed consortium report out on CCA agent monitoring, ratings and/or scorecards in regards to quality customer interactions, case accuracy and productivity.	Compile report on information gathered from each consortium and MiLES and share that report with CCA Operational Technical Workgroup			Kris Weden	10/7/2019
Discussed post call customer service survey and viewed power point presentation depicting current survey including limitations and potential areas for improvement.	<ul style="list-style-type: none"> <li>• Research texts from other call center customer service surveys for possible edits on our current survey.</li> <li>• Further discussion on number and type of questions.</li> <li>• Further discussion on range of response rather than yes or no responses. (Example: 1=poor or disagree, 3=average or met needs, 5=excellent or exceeded needs).</li> </ul>			<ul style="list-style-type: none"> <li>• Paul Michael will research other surveys</li> <li>• Workgroup members should be prepared to discuss changes to survey questions and response range at October meeting</li> </ul>	10/14/2019
Next meeting: Monday, October 14, 2019 1:00 p.m.					