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**INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC) Agenda**  
**January 21, 2021**  
**1:00 – 3:30 p.m.**  
**Zoom Link:**

<https://dhs.wi.zoom.us/j/88695359976?pwd=NGRMM0IDbnd1ZUJFbU5FTes1dEc0QT09>

**For audio dial:** 301-715-8592, **Meeting ID:** 886 9535 9976 **Password:** 215884

1. Administrative Issues (Debbie Waite & John Rathman)
2. Approval of November 19, 2020 Meeting Minutes (Debbie Waite)
3. Policy Updates (Rebecca McAtee)
  - a. COVID-19 Updates
4. Subcommittee Updates  
(Attachment)
  - a. IMOA (John Rathman)
  - b. Performance Monitoring (Ann Kriegel)
  - c. CCA (Kris Weden)
  - d. EBD/LTC (Kari Ponti)
5. Regional Enrollment Network (John Rathman)
6. Income Maintenance (IM) Funding and Contract Updates (Debbie Waite & John Rathman)
7. Consortia Feedback: IM consortia will share feedback with DHS (John Rathman)
8. Administrative Memos (Debbie Waite)
9. Gap Case Monthly Update / Public Comment  
(Attachment)
10. Announcements/Items for future agenda
11. Adjourn

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**Income Maintenance Subcommittee Key Messages**  
**Income Maintenance Operational Analysis (IMOA)**  
**Friday, December 4, 2020**

		IM Consortia		
Other Policy Updates	<p>Autumn provided update on cost-share; DHS will be reinstating patient liability and cost share on February 1 to minimize over asset issues that may negatively impacting members.</p> <p><u>Roll out</u></p> <ul style="list-style-type: none"> <li>• Mid-December: DHS will reach out to Nursing Homes</li> <li>• End of December: DHS will send notices to members who have paid more than they should have. Letter will provide guidance on how to spend down assets. Will also provide guidance to IM staff on how to answer questions.</li> <li>• January 5: IM staff will be able to confirm increases in CWW</li> <li>• January 9: conversion will be run. Normal exceptional alerts and process will be followed. IM staff can expect a small number of cases needing to be processed manually.</li> </ul>	IM Consortia & DHS Staff		
CARES release: Spousal Signature Space	<p>CARES project release was shared. With reorg, changing prioritization schedule and releases – more info to come in future meetings.</p> <p>There will be 3 system releases in 2021 February, June, and October.</p> <p>Reviewed projects and Alicia will send handout after meeting.</p> <p>It was noted that there are many MYACCESS and ACCESS enhancements planned for 2021, including a message center. This concept will be brought back to this subcommittee for future discussions.</p> <p>Spousal Signature Space CWW will be enhanced with a new page to collect a community spouse signature. If both spouses are on the phone together the script can be read at one time. This change was a request by consortia/agencies. Consortia expressed thanks to Debbie and System Team for these positive changes.</p>	IM Consortia		

**Income Maintenance Subcommittee Key Messages  
Income Maintenance Operational Analysis (IMOA)  
Friday, December 4, 2020**

Access Modernization Intro	Changes to ACCESS and myACCESS in 2021 will be more member focused, being more user friendly and allow self-service whenever possible. Moving access to a web-based format will also allow DHS to make enhancements in future more quickly. Handout will be sent to members after meeting.	IM Consortia		
RSUD Benefit	<p>Handout was reviewed. Treatment benefit will be available to members receiving full BC+ &amp; Medicaid eligibility. This is not a new category.</p> <p>Two treatment types High intensity lasting 30 – 60 days Low intensity lasting 3 – 6 months</p> <p>Roll-out planned for 2/1/21 CWW changes will be implemented 6/26/21 Workers will need to follow a temporary process between roll-out and CWW changes and process was reviewed. CARES Coordinator notice will be sent in January. Forms will go through DPU. Unknown if DPU will determine if the facility is approved or if this will be determined by IM. Unknown if IM will receive forms only if member is open for MA or also new requests.</p> <p>Reviewed Policy changes: Members receiving RSUD treatment will be considered temporarily absent - no change to BC+ assistance group size</p> <p>Individual of any age who is receiving RSUD treatment while residing in IMD will be eligible for full BC+ or Medicaid as long as they meet all other program rules.</p> <p>Members are not required to be an institution to receive the RSUD benefit. Many members will be residing in a CBRF.</p>	IM Consortia & DHS Staff		
Innovative Training Project Update	<p>Abby &amp; Julie reported on Innovative Training Project. Moving forward with development and design. Subcommittee will begin meeting 2 times @ month beginning January to provide necessary input including performance, objectives, and overall evaluations and measurements.</p> <p>Training call center developed a transition plan to free up resources for training</p>	IM Consortia – impact on trainees		

**Income Maintenance Subcommittee Key Messages  
Income Maintenance Operational Analysis (IMOA)  
Friday, December 4, 2020**

	<p>team to develop the new program materials and build curriculum while ensuring trainees are being supported.</p> <p>Effective 2/1/21, Training Call Center</p> <ul style="list-style-type: none"> <li>• Will continue to respond to general questions (Curriculum questions enrollments, computer setting issues, etc.)</li> <li>• Will continue to respond to FSET training questions</li> <li>• Will offer regularly scheduled webinar-style sessions for case scenario reviews. Workers will be required to attend and check their cases as trainer goes through scenarios.</li> </ul> <p>Trainee will complete a self-check on LTC scenarios/questions with answer key provided by DHS</p>			
Open Enrollment	Consortia provided feedback on status of FFM applications and what they have been experiencing. Some indicated that FFM applications are lower than 2019, others are seeing an increase, and others have stayed the same. Information will be helpful to share with RENS.			
Future Agenda Topics	Reviewed – next meeting is 1/8/21			

**Income Maintenance Subcommittee Key Messages  
IMOA  
January 8, 2021**

<b>Agenda Item</b>	<b>Message/Action/Motion</b>	<b>Assigned To/ Referred to IMAC</b>	<b>Deadline</b>	<b>Closure</b>
Administrative Updates	Debbie Waite welcomed everyone to the new year. Debbie alerted members that attendance would now be taken electronically for these meetings. Debbie also asked all consortia members to review their membership lists on the website so that email communications will go to appropriate representatives.			
COVID-19 Policy Updates	Rebecca McAtee shared with IMOA members that the Federal Government did sign another COVID relief bill on December 27 that impacted the Foodshare program. Critical and time sensitive items in that bill include increased Foodshare allotments	IMOA Membership	On-Going	

**Income Maintenance Subcommittee Key Messages**  
**IMOA**  
**January 8, 2021**

	<p>effective January 1, 2021. A mass change will be run this weekend to adjust February allotments that will impact over 400,000 cases. About 30,000-40,000 of cases will require that the consortia manually work the case before February 18. Participants will be notified in February that their allotments will be increased through June of 2021. DHS is working on putting together a talking points document for consortia workers to use. DHS will also be sending participants a mass email, and they will also be providing information to advocacy agencies about these changes. DHS is also continuing to analyze changes in the bill that impact unemployment. In the bill, the unemployed will receive an additional \$300 per week as a federal supplement. This additional funding will not impact Foodshare benefits. DHS is also continuing to analyze the impact of this bill on student Foodshare recipients.</p> <p>Rebecca also highlighted that this new bill also has provisions for the P-EBT program that will impact the 2020-2021 academic year. DHS is working with DPI and Deloitte on the P-EBT program and will soon issue some updated talking points on this program as consortia are reporting getting many questions about this program.</p> <p>Rebecca also highlighted that Aldi Supermarkets can now also process on-line food purchases in the State of Wisconsin. Many other groceries also purchased wireless payment units to foster curbside pick-up of groceries and Rebecca will supply a list of grocery stores that did get that equipment.</p> <p>DHS has also submitted a waiver to extend the Foodshare interview waiver through June. Foodshare renewals have presently been extended through February to keep it aligned with the Medicaid program. Rebecca highlighted that the Federal government will be extending the national pandemic through April, so Foodshare and Medicaid renewals will also be extended until likely at least this timeframe.</p>			
<p>CARES Security Manual Timeline Update</p>	<p>Carla Treuthardt updated consortia members on the three manuals that are presently being written. Carla highlighted that the security manual is completed and that over the next two to three months the policy manual will be written. Once the policy manual is completed the reference manual will be written. The goal is to have all three manuals completed by the end of the year. Starting next week, the consortia representatives will start reviewing the drafted security manual. Plans are also to create a confidential case manual once the first three manuals are completed.</p>	<p>IMOA Membership</p>	<p>December, 2021</p>	

**Income Maintenance Subcommittee Key Messages**  
**IMOA**  
**January 8, 2021**

	Two consortia still need to complete their 2020 security program access review and then the 2021 security program access review is expected to be started in April or May of 2021.			
Internet Browsers	<p>Nikhil Zaveri highlighted for consortia members that the document viewer is a web based function that uses JAVA technology. The recent document viewer problems impacted county users that were running JAVA version 6. A patch was supplied for those running JAVA 6 that should have fixed the issue. If anyone is still having issues they should contact the Wisconsin Help Desk. Nikhil highlighted they are working on making changes to make the document viewer compatible with other internet browsers (including Edge and Chrome) by the end of the third quarter of this year. The Bureau of System Management also anticipates that sometime next year the entire Cares Worker Web (CWW) system will be compatible with Edge and Chrome. Consortia members requested that the Bureau of System Management assemble a written overview document of the work they plan to do in the next six to nine months that can be shared with county information technology staff.</p> <p>DHS gets information technology services from the Department of Administration (DOA). DOA completes many of the software licenses have to be renewed. Last weekend some of the software licenses were upgraded which required one of the plug-ins to be upgraded to a newer version. For agencies having scanning issues, they likely needed to upgrade that plug-in. Instructions were sent out on how to fix this issue, but if issues still result county IT staff should contact the Wisconsin Help Desk.</p> <p>To help facilitate communications, DHS will review and ensure that they have needed information from counties to help facilitate future IT communications.</p>	IMOA Membership	2022	
Innovative Training Update	Julie Rentmeester gave consortia members an update on the Innovative Training project and the work that has been completed over the last month. During the first quarter of 2021 work is being completed for training call center staff, evaluating the staffing needs of the new system, and ensuring the new training program has clear performance objectives.	IMOA Membership	2021	
2021 Workgroup Kickoff	Debbie Waite reviewed the 2021 workgroups that we identified as being key to complete our 2021 goals at our October annual retreat. It was agreed to proceed in setting up the new workgroups and to disband those that have completed their goals. Workgroups are always anticipated to be short-term in nature. They form,	IMOA Membership	2021	

Income Maintenance Subcommittee Key Messages IMOA January 8, 2021				
	they complete their work and then they are disbanded.			
Review of Existing Reports – Identify Needs	Consortia reported that the majority of reports they use are found in WEBI. In terms of additional report needs, it was highlighted that ad hoc reports for special projects or new programs, it would be helpful to have reports that show county by county caseload impacts. It was also highlighted that a report to show migrant worker case numbers would be helpful. A concern was also raised that report numbers sometime differ from caseload numbers shown on the dashboard.	IMOA Membership	On-Going	
Next Meeting	The next IMOA meeting will take place on Friday, February 5, 2021.	IMOA Membership	February 5, 2021	

Income Maintenance Subcommittee Key Messages Performance Monitoring 1-20-2021				
Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
2021 PM subcommittee	Recap of Nov 2020 meeting			
Review 2021 charter goals	Stevey Poppe (DHS), Ann Kriegel (cons) co-chairs Reviewed Charter-IMAC committee Reviewed 2021 goals/focal areas-error rate remains main focus.			
Consortia round table a. Beneficial b. Suggestions	Consortia submitted info prior summarized as: sharing is beneficial and going over error trends is helpful to reduce errors.  Discussed how and why key messages are used and shared. Agreed to share specifically with PM committee in addition to what is currently being done. Clarified what members are requesting for reports-deep dive into one or two reports at a time. Sharing-will request			



	<p>info prior and discuss in more detail at the meeting rather than just going around at the meeting.</p> <p>Reminder that there is IMMR training in the Learning Center for reports. DHS is exploring additional training.</p> <p>Requested QC data sooner to make an impact on the current error rate. That is not an option. We can try to collect it from the consortia who collect the data to see what trends there are.</p>			
Error Review committee updates	<p>Met in Oct 20 and Jan 21</p> <p>Discussed wages and salaries</p> <p>JIRA item will be submitted for sick/disability income not counting for BC+ after further discussion will review before submitting</p> <p>Working on a comment section for shelter screen</p> <p>Next meeting April 2021</p>		Error review committee	
Monthly consortia report	<p>The error rates are stagnant right now due to COVID. No data past July. Mar-May 2020 excluded. Unsure when we will have Aug/Sept data. IMQA top error issue for IM Central, report has been updated.</p>			
<p>Root cause discussion- FSQC/IMQA</p> <p>a. FSQC June/July/Aug</p> <p>b. HC Oct/Nov/Dec</p>	<p>Handout provided for this. Increased instances of unreported income--Data exchanges are not always being used/checked and when used are not always being used correctly. Seems to be some confusion on C9 and when something needs to be questioned based on discrepancies or questionable information.</p> <p>Verification not always in ECF.</p> <p>CS -workers not using info in CWW, but going into KIDS-use that info unless yellow banner. Or took self-reported CS instead of looking in KIDS.</p>			

Denial & Terminations a. CAPER b. Healthcare	Incorrect notices Verification in the file, but not used Denying before the 30 <sup>th</sup> day This topic will be a pre-assignment before the next meeting.			
Future Agenda Items	Denials and terminations, FSQC error root cause discussion			
Action steps	DHS follow up with Ali regarding sick/disability page JIRA.  DHS research or schedule IMMR training options.  DHS get guidance on contacting members for waived interviews.			

**Income Maintenance Subcommittee Key Messages  
CCA Operational Technical Workgroup  
December 14, 2020**

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
Genesys Updates and Discussion Items	<p>Received update on project status from Paul Michael and Adam Afsary.</p> <p>Completed work items:</p> <ol style="list-style-type: none"> <li>1) Overall business requirements for Automated Telephonic Signature (ATS) with GTS and Deloitte.</li> <li>2) WAMS Authentication project accepted by DET.</li> </ol> <p>Work items in progress:</p> <ol style="list-style-type: none"> <li>1) Genesys development of custom application for back-end processing of the ATS files.</li> <li>2) Reviewing current call flows with GTS.</li> <li>3) Continuation of vetting of project plan.</li> </ol> <p>Upcoming Discussions/Presentations:</p>			

	<ul style="list-style-type: none"> <li>• New functionalities in Genesys: ATS and Call-Back</li> <li>• Updates to Voicemail Feature.</li> <li>• Demos</li> <li>• IT Discussions</li> </ul> <p>Reviewed timeline for pilot and phases</p> <p>Questions and concerns regarding this project can be directed to :  <a href="mailto:DHSGenesysCloudProject@dhs.wisconsin.gov">DHSGenesysCloudProject@dhs.wisconsin.gov</a></p>			
Next meeting	December 28, 2020 meeting – CANCELLED Next Meeting – Monday, January 11, 2021 @ 1:00 p.m.			

Income Maintenance Subcommittee Key Messages EBD/LTC January 19, 2021				
Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Review EBD/LTC Committee Charter	Elizabeth Dehling explained the goals from 2020, went over new goals for 2021 to make sure all agreed with what is being presented. * Reminder that meeting information is to be shared within counties due to the technical nature of the meetings.	All EBD/LTC workers, leads, supervisors and managers.		
New Spousal Signature Page- Cheri Stoffel/DHS	Cheri presented PowerPoint overview of the project. No policy changes- changes are to support existing policy. CWW- new page in system, where information for spouse can be inputted and pended. There will be page level case comments, the ability to document and approve undue hardship on this page. Workers can collect telephonic signature for both applicant and spouse. Changes made to (available 03-01-21) MA EBD Application, ACCESS, MyACCESS and PPRF. Cases will be converted automatically and an exception report sent to consortia for cases in renewal or intake mode that will need to be updated. Cares Bulletin: 02-22-21 & Process Help update 02-27-21.	All EBD/LTC workers, leads, supervisors and managers.		

**Income Maintenance Subcommittee Key Messages**  
**EBD/LTC**  
**January 19, 2021**

Updates, updates and more updates- **Michelle Furr**, Cheri Stoffel, Manee Hang and Nikki Biddick

\*Federal Emergency extended to 04-21-21.  
 \*Updates forms: F-10097 and F-10098. Income and asset allocation notices for spousal impoverishment cases. These notices will be available 03-01-21. For income allocation notices there will be different notices for institutional and waiver case. These will be available in the manual letter selection in client correspondence.  
 \*There will be an Ops Memo coming May 2021 or later with some clarifications, tweaks and updates to policies. More to come at the April meeting.  
 \*MA EBD Application updates: contact info aligning with ACCESS and CWW flow. More info collected for spouse. Added a question: Are you working with the ADRC on waiver enrollment. Burial set aside question on assets page. Medicare Part D enrollment/information added. Backdate section moved up so only signature is needed for whole application. NEW SECTION: LTC. All questions regarding LTC related process added in one section. For example, divestment questions, LTC Life Insurance etc.  
 \*\* **Issue** that MADAs are not being sent over to DDB for various reasons and not being noticed for months later. These are not system issues. It is most important that cases are checked to make sure the file did go over to DDB, look to Process Help 9.4 to check troubleshooting tips and cases that need to be sent manually instead of electronically. There is an alert <429> received the next day if it didn't transmit to DDB: DDB waiting for documents to be scanned. \*\*  
 \*MEH changes will be get overhaul in 2021. The goal to assist with this process is a goal of this committee. First task: review Divestment chapter 17 that was sent out and give feedback to tri-chairs or Elizabeth by EOD 01-25-21. Info due to Michelle Furr by EOD 01-26-21. Michelle also asked for any other sections that need updating or clarifying information to let her know via the tri chairs or Elizabeth. Next up Annuities chapter 19. Ideas sent so far: burial and trusts.  
 \*New and updates to Community waiver page in CWW. Date for program request has been removed as not needed. New field: Date of initial functional eligibility. ADRC referral form also being

**Income Maintenance Subcommittee Key Messages**  
**EBD/LTC**  
**January 19, 2021**

	<p>changed to make this update. Moved up on the page is the question are you meeting your cost share. The Managed Care part of the page is now all obsolete. The need for an enrollment indicator in CWW is still being worked on, it did make a project but there was no money to complete.          Per Nikki updates to training with all the changes will be made with February and March updates.</p>			
Meeting ideas- All	<p>Annuities, COVID related, local mental health programs, Adult protective services, SSA presentation, DDB process and EM CAPO process. A goal for this committee is use local expert knowledge and resources so it most important to send contacts if you have those as well. Please submit any ideas for presentation to Elizabeth, Julie, Ron, Kim or Kara. These meetings will happen the 3<sup>rd</sup> Tuesday of the month due to a scheduling issue: 04-20-21; 07-21-21 and 10-21-21.</p>			
Next Meeting	04-21-21		Elizabeth D, Julie S, Ron R, Kim R and Kara P	03-2021