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INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

September 16th, 2021

1:00 – 3:30 p.m.

Zoom Link: <https://dhs.wi.zoom.us/j/83430726197?pwd=WG5UajZQQ0x4OEloVS8wR2s5aFhBdz09>

For audio dial: 312-626-6799 **Meeting ID:** 834 3072 6197 **Password:** 387458

1. Administrative Issues (Katie Sepnieski & Doreen Lang)
2. Approval of August 19th, 2021 Meeting Minutes (Katie Sepnieski)
3. Policy Updates (BEEP Policy)
 - a. COVID-19 Policy Updates
4. Subcommittee Updates
(Attachment)
 - a. IMOA (Doreen Lang)
 - b. Performance Monitoring (Ann Kriegel)
 - c. Program Coordination (Lorie Graff)
 - d. Call Center Operational/Technical Subcommittee (Kris Weden)
5. Regional Enrollment Network (Lori Graff)
6. Income Maintenance (IM) Funding and Contract Updates (Katie Sepnieski & Doreen Lang)
7. Consortia Feedback: IM consortia will share feedback with DHS (Doreen Lang)
8. Administrative Memos (Katie Sepnieski)
9. Gap Case Monthly Update
(Attachment)
10. Public Comment
11. Announcements/Items for future agenda
12. Adjourn

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Income Maintenance Subcommittee Key Messages
IMOA
September 10, 2021

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
DHS Policy/COVID-19 Updates	<p>Autumn Arnold reported that there were CARES Coordinator Notices sent out regarding Afghan Refugees and Pandemic UC – no other major HC updates.</p> <p>Jori Mundy and Jonelle Brom reported on the ARPA funds – DHS submitted 2021 & 2022 plans to FNS and are still waiting for approval. After approval will walk through complete plan with Operational Leads, which is much what consortia provided feedback on. Will also send out contract addendums, which will have a quick turn-around time.</p> <p>Vaccine program - CARES Coordinator Notice sent reminding agencies that mail for vaccine program will be sent for homeless.</p> <p>P-EBT; Summer release, which was a lump sum of \$365 for any child known to be eligible was on 8/21. Provided statistics. Recently received guidance on 2021-22 school year. DHS reviewing and will share when plan is available. Held sessions with schools to obtain information.</p>	IMOA Members	On-Going	
Security Update	<p>Carla Treuthardt provided updates on Security</p> <ul style="list-style-type: none"> • CARES audit kicked off last month – sent to 4 consortia and reviewed schedule • Directive to audit all CARES user accounts this year, including FSET, W2 Agencies, State 	IMOA Members		

	<p>Agencies, etc. over 9000 CARES accounts and will need to wrap up in December. Will be auditing all active accounts yearly.</p> <ul style="list-style-type: none"> • Make sure that agencies Security Officer and back-ups are up to date. Changes should be reported to AIMS • If employee is leaving – must report to AIMS timely, yearly audit is a review • Continuing to work on Reference, Procedural, and Policy security manuals and will get published as soon as possible. • AIMS team is seeing some errors on new access request forms, which delays the request. Some missing items include no security officer signature, no valid WAMS or WIEXT IDs – need to make sure staff complete both steps. 			
<p>Changes to Overpayments Discussion</p>	<p>Jonelle advised that DHS has been reviewing policy on overpayments to determine if improvements can be made. DHS worked with FNS on cost effectiveness plan, which was approved. Will not be applicable to fraud, IPVs, duplicate FS participation, or QC errors.</p> <p>Craig Hayes reviewed the major areas that will be changed, both include MA & FS programs:</p> <ol style="list-style-type: none"> 1) Minimum Threshold - Potentially looking at \$500 threshold for agency and client errors. 2) Redefining Lookback Period --Potentially looking at standardizing 12 months 3) Date of Discovery - Potentially looking at the date agencies create the claim in BRITS system as date of discovery. 4) Compromising Claims -Largely from a fair hearing issue; once a claim is established, will have the ability 	<p>IMOA Members</p>		

	<p>to change the claim amount. May take a percentage based on ability of pay – still discussing this topic and will have more details fairly soon.</p> <p>Jonelle reported that it is clear from CMS that we are not able to process overpayments for HC during PHE. Submitted same process to FNS for FS and waiting for approval. Will send guidance if/when received.</p> <p>Several consortia had questions about changes:</p> <ul style="list-style-type: none">• Will DHS need to request a waiver for the FS lookback period? DHS reported that they reviewed and clarified regulations and will not need a waiver.• Will the DHS Collection Agency or Consortia have the discussion and decision on the compromised claim? Jonelle reported that DHS is still working on this process, could be guidelines on when consortia can change claim after fair hearing; Could be IM or Dept decision. Although agree with the policy, there is consortia concern that this is a workload issue.• What is the reason for changing the lookback from 6 yrs to 12 months? DHS reported fairness to members/recipients.• Is there a change in SWICA processing? No change to current SWICA process – purpose is to look at current and ongoing eligibility.• Will consortia need to adjust or modify current overpayments? Jonelle indicated that we will not be expected to modify current overpayments			
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	<p>except for overpayments completed during PHE and FNS approves their request. DHS is in holding pattern until they receive guidance/approval from FNS. Several states asking for same waiver because many of the notices to remind members to report were not sent out. Consortia indicated that OIG provided guidance during FPIP about PHE that wasn't consistent. Jonelle will work with OIG to make sure guidance is consistent.</p>			
<p>Genesys Update</p>	<p>Paul Michael shared PowerPoint. Reviewed timeline and rollout phases, which is on schedule 4 critical dates for each phase – dates provided for each one in handout</p> <ol style="list-style-type: none"> 1) confirmation worksheet sent to CCA Admins for confirmation of users info (return one per consortia) 2) within one week, will return worksheet 3) user login info sent to all users – begin training and ability to access/practice on platform 4) begin taking live calls on Genesys <p>Training will be published in two locations; linked from gateway page for non-IM users; and will be published on IM Training Center 9/2 for all IM users.</p> <p>Some issues they have been working on:</p> <ul style="list-style-type: none"> • Agents will not be able to change phone number as in CCA but Genesys will be able to accommodate two or multiple numbers by assigning places. <p>CCA Admins will receive confirmation sheets prior to phase in. if worker has two numbers, will need to add both numbers. For agencies who have staff working remotely and in the office sharing phone numbers, (hoteling)</p>	<p>IMOA Members</p>		

	<p>currently going through testing for this process identifying place.</p> <ul style="list-style-type: none"> • Outbound Interaction IDs: Expects to have connection ID (interaction ID) display on outbound calls available/resolved before consortia go live. May not be available for training purposes. • Blind Transfers – calls were disconnecting but this was resolved last evening. • Allowing agents to see their own interaction history – should be available going live. <p>Questions from Consortia</p> <ul style="list-style-type: none"> • What about new users after worksheet submitted – send list back in with ONLY new workers to get provisioned • Can Consortia still change staff to appropriate workgroups? CCA admins will still be able to skill staff – more info regarding how to skill on training <p>Will be hiring a Genesys SME who can assist with questions Please remember to send questions to Genesys email on handout.</p>			
<p>Innovative Training Update</p>	<p>Julie Rentmeester shared updates on the Innovative Training: Currently working on designing/developing program. Finishing up writing program content. Instructional designers creating self-study learning access. They are targeting a pilot in November, but need to complete several steps before confirming. Pilot conversations</p>	<p>IMOA Members</p>		

	<p>will occur in the next two weeks. One pilot with MILES & one with BOS</p> <p>Creating Learning Library, which will be self-study topics that new and existing workers will be able to access</p> <p>Developing draft cohort design modeling – reviewed with training subgroup. Will bring more details next month at IMOA</p>			
Other	<p>COVID-19 Micro trainings will be available on 9/17 regarding FS Interviews, FS Renewals & FS SMRFs</p> <p>Consortia indicated that past CWW demos are not available – Jodi Noble will research</p> <p>Consortia questions when the Sept ERV report will be available. Jody reported that it won't be available before 9/14.</p>	IMOA Members		
Future Agenda Items	<p>Policy updates, COVID policy updates, Innovative Training, IMM decommissioning/fair hearing information in policy handbooks (may be at IMAC)</p> <p>Overpayments</p>			
Next Meeting	<i>Next Meeting will be Friday, October 1, 2021</i>	IMOA Members	On-Going	

**Income Maintenance Subcommittee Key Messages
Program Coordination
Wednesday August 18, 2021**

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
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Civil Rights Plan 2022	<ul style="list-style-type: none"> ▪ John Touhy presented the Civil Rights Requirements for 2022-2025 (power point). The requirements apply to both DCF and DHS contracted agencies. The Civil Rights Plan and compliance is required by County, not consortia. ▪ Letters of Assurance (LOA's) are due by 1/24/22. ▪ Civil Rights Compliance Plans are due by 3/31/22. 			
IT Workgroup Status	<ul style="list-style-type: none"> • David Timmerman updated the group that the new IT and Policy Enhancement workgroup will have their first meeting on August 24th. Carla Sumner and Kinen Fleming are co-leads for the new workgroup. 			
Project Timeline Review	<ul style="list-style-type: none"> ▪ Lorie Graff shared the current Policy and Project Timeline. It was suggested that having details of the CARES releases on the Timeline might be helpful. However, given the large amount of information that would need to be added to the Timeline, a decision was made not to include the details. The Cares release dates will continue to be included on the Timeline. ▪ David Timmerman indicated this Timeline will be helpful to the New IT and Policy Enhancement workgroup. 			
Roundtable Discussion: <ul style="list-style-type: none"> • What challenges or issues have consortia encountered with staff working remotely and the impact on customer service? • What feedback (positive or negative) has consortia received 	<ul style="list-style-type: none"> • Consortia took turns sharing information on the questions presented for the roundtable. <ul style="list-style-type: none"> ○ Consortia have not received negative comments to customers as a result of remote work. However, due to the waivers, customers have been generally very pleased with how quickly they are able to reach the call center. ○ Some consortia have had to work through technical difficulties with softphones and 			

<p>from customers related to staff working from home?</p> <ul style="list-style-type: none"> • Are there any changes to consortia work model (ie-permanent work from home, rotation of staff, lobby services, brochures etc.) 	<p>other remote work technologies.</p> <ul style="list-style-type: none"> ○ Many Consortia have or are building telework into their regular operations. 			
Future Agenda Items	<p><i>Next meeting: Wednesday October 20, 2021, Zoom</i></p> <p>Agenda Items:</p> <ul style="list-style-type: none"> • Trial Unification Status for FoodShare • Project Timeline Update • IT and Policy Enhancement Workgroup Update • Round table discussion – TBD 			

**Income Maintenance Subcommittee Key Messages
Performance Monitoring
09/15/2021**

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
<p>Welcome/Recap 7/14/ meeting</p> <p>-update on sched F error</p> <p>-update on GF code</p> <p>-BC not on file update</p>	<p>GF, NV with multiple due dates, BC not on file-still researching will update when they have more information.</p> <p>Schedule F-are workers supposed to re-do the math. No expectation that agents recalculate. The error in question was very obvious. QC reviewers do check all of that and to make sure it's reasonable. Agents are not expected to do that.</p>	Ashley Schabel		
OP reduction project	OP reduction tool. Scheduled for Feb 2022 release.	Lisa Hanson/Latanya		

	<p>Each consortium will be able to customize the sample based on needs/problem areas. Specific workers will also be able to be selected to have all FS cases reviewed if the consortia wants that option. Vision is that when worker makes an error with identified elements and will be reviewed by QC team before confirming. This will mimic the former manual project that was completed. The project had a significant impact on error rate in 2019. Tool will be embedded into eligibility system. This morning consortia reps met with Lisa Hanson for feedback. Goal is to expand to other programs but will start with FS. This will be an optional tool initially.</p>	Baldwin		
Monthly cons report	<p>Increase in caseloads. Timeliness remains good for applications and renewals. CCA stats still very good. uptick in calls received-renewals, notices, changing from COVID rules, SWICA dump . FSET down. QC data is last reported data and is from last fiscal year. We will see new data in late November from July QC data.</p> <p>Regarding taking certain hearings out of the report. New person at DHA-Donna will work with that person. This part will look different. Since this is not a performance measure, should this just be removed from the report. LaTanya will take that back.</p> <p>Still have inflated issuances which impacts the overpayment percentage.</p> <p>Employment errors since COVID is primarily client error.</p> <p>FEIN errors-no status update on the EVFE that was changed and contributing to those errors.</p>	Donna King		
QC error findings -top errors	<p>Northern-pull 2 cases/worker/month. Most are case comment/procedural/C9 codes. Have worker fix.</p>	Ashley Schabel		

<p>-root causes -how resolved</p>	<p>Worker and supervisor receive the information. Track to see if there are trends and then plan training based on that. also an opportunity to provide kudos when no errors.</p> <p>GRC-family team-targeted case review about 200 cases with employment. C-9. Staff struggled with that. comments, FEIN, etc. main focus was to take a look at emp screens. No specific errors-all over the board.</p> <p>IM Central-QC on rotation basis. one for each worker. Currently change in QA position so haven't been done for a couple months. Did use an excel spreadsheet so Leads and Supervisors could see patterns for worker/county, etc. put errors in charts. Example-C-9 not sending verification letters -so did reminders to send those out. EI-where to find the FEIN-added to newsletter. Documentation reminders.</p> <p>Southern-heavy focus on training. Different trainings twice/month. Topics come from this meeting. Example – FEIN. Agent reminders at meetings.</p> <p>Capitol-concentrate on EI. Looking at docs processed prior week. Gather a sample of five before informing supervisor to determine if there is a pattern.</p> <p>Bay Lakes-EI similar to others. reviewed prospective budgeting with staff. Provided different scenarios and staff provided answers. Worked with supervisors before started getting verifications again. Staff not using PH for HC suspensions.</p> <p>Western-EI, CS -interviews being waived leaves a lot of guesswork.</p> <p>Many consortia required staff to call if anything</p>			
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	questionable and/or to make one attempt			
CAPER	<p>Molly presented unofficial information. It is based on observations from MERs.</p> <p>Notice errors-how many are worker preventable. Approximately 1 of 3 is worker preventable. One of the worker errors is caused by workarounds and not suppressing the notices and mailing a manual notice. More guidance on correct process would be helpful and fixing the system would be more helpful.</p> <p>Processing timeliness issues. Causes unclear notice of decision. Incorrect information in system/filing date. Wrong income amounts being entered. Income could be wrong in case or be on notice wrong causing and incorrect notice</p> <p>Cases denied not timely-before or after the due date. Sufficient proof was in ECF but not acted on by agency. May have been received after case was nv'd. proof was in ECF and worker didn't see it. about 17% Agencies handle partial verification submitted in different ways.</p> <p>Cases pending when should not be, or not pended when they should be, lack of verification notice or wrong due date.</p> <p>Wages/Salaries-35% income budgeted wrong, counting after job ended, etc. 35% =incorrect calculation. 15% income used was unclear/questionable. 10% wrong pay frequency entered. EI counted or listed for wrong months.</p>	Molly Aird		
Roundtable Strategies, methods/suggestions	<p>Northern-website specific for workers with state tools, community resources, etc for workers to go to.</p> <p>Updates are notated. Scavenger hunt to familiarize</p>	Ann Kriegel/all		

<p>promote in retaining policy, process, procedure</p>	<p>staff. Updated at least weekly.</p> <p>Western-website similar to Northern. Single best resource. Meetings recorded, time off calendars, etc. Workers use it continuously. Desk aids. Process and policy together for workers.</p> <p>IM Central-also a web page. Invaluable. A team does the updates. Data from QC reviews and posting resources on website and then do follow up QCs.</p> <p>Capitol-website (repository) invaluable tool for staff and management. Training, etc. refresher trainings available. County specific information on the website as well. Scavenger hunt in new worker training</p> <p>Bay Lakes-no website. Brown just got sharepoint-may be able to use that as a sharing platform. Staff tend to like desk aids. Use participoll or webex polling to gauge retention.</p> <p>East Central-uses policy stat and one note. Desk aids, training recordings, SOPS.</p> <p>Southern-drop box. Iowa county built a website that leads to resources. Can be a struggle to maintain. Agent reminders/trainings/forms. Cahoot to quiz on policy.</p> <p>GRC-sharepoint site (the Hub) St. Croix maintains, the rest of the consortia provides content. Address gaps and gray areas. Encourage staff to use state materials first and then go to the HUB for gray areas. Increases consistency. Repetition is best way to encourage accuracy. Need to remain adaptable.</p>			
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Future agenda items		Molly Aird/all		
Next meeting 11/17/21				

**Income Maintenance Subcommittee Key Messages
CCA Operational Technical Workgroup
August 30, 2021**

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
Genesys Project Updates	<ul style="list-style-type: none"> • General Genesys training, in the form of YouTube videos, were available on 8/23/21 for staff who do not have access to the DHS Learning Center. • General Genesys and ATS training will be available in the DHS Learning Center for consortia staff as of 9/22/21. • Testing has uncovered some audio issues with Genesys but ongoing troubleshooting has shown some positive results recently. • Touch tone recognition in IVR's have experienced issues recognizing tones from telephone key pads. There has been improvement in this area and testing continues. • Currently experiencing intermittent conferencing issues that affect "coaching" capabilities. This issue should not cause a delay in pilots or rollouts. 			

<p>Electronic Case File Telephonic Signature Search Demo</p>	<ul style="list-style-type: none"> • Upgrades have been made to ECF to include Case Recording and RFA Recording searches. • Agents will only be able to view results but supervisors will be able to make corrections. • The telephonic signature ID will be found in these searches under case comments. • Recording user ID will be the agents WAMS ID. • Recordings can match either an RFA or case number. • Exception reports will be available for recordings that do not match to an RFA or case in CWW. • ECF recordings are only ATS recordings. General call recordings will not be held in ECF. 			
<p>Automated Telephonic Signature Process</p>	<ul style="list-style-type: none"> • Genesys login will remain as WAMS ID and password (like CCA is now). • In Genesys the “place” refers to the phone number you are using. • Upon login agents will be in “not ready” status. • While on a call if the caller presses any keys on his phone keypad it will be as if the agent were pressing keys. • If using computer “soft phone” only one “place” will be needed for Genesys. If not using a soft phone multiple places will be needed for Genesys. Genesys will only accept two places so agents are limited to two different numbers. 			
<p>Next Meeting</p>	<p>Monday, September 13, 2021 @ 1:00 p.m.</p>			