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INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

April 18, 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 – 1:05 PM	Welcome	Katie Sepnieski/Lorie Graff
1:05 – 1:10 PM	Approval of March 21, 2024, Meeting Minutes (Attachment)	Katie Sepnieski
1:10 – 1:45 PM	Department of Health Services Policy Updates	DHS Policy
1:45 – 2:00 PM	Subcommittee Updates (Attachment) • Income Maintenance Operational Analysis • Call Center Technical/Operational • Performance Monitoring • Fraud & Program Integrity (not presenting) • Elderly, Blind, Disabled/Long Term Care (not presenting) • Training (not presenting)	Lorie Graff Kris Weden Nicole Rolain/Ann Kriegel
2:00 PM – 2:45 PM	CARES Release • Case Documentation for Salesforce Email and Text Messages (Shawn Thomas) • Fiscal Accountability Act: FSET exemptions (Mai Xiong) • Genesys Cloud CX changes to CWW	DHS Staff
2:50 – 2:55 PM	Income Maintenance (IM) Funding and Contract Updates	Alicia Grulke/Lorie Graff
2:55 – 3:00 PM	Consortia Feedback: IM consortia will share feedback with DHS	Lorie Graff
3:00 – 3:05 PM	Administrative Memos	Alicia Grulke/Lorie Graff
3:05 – 3:10 PM	Regional Enrollment Network	Lorie Graff
3:10 – 3:15 PM	Public Comment	All
3:15	Announcements/Future Agenda Items	All

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Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
DHS Policy/COVID-19 Updates DHS Staff	Kevin Wetherbee, the new Deputy Director of BEEP/Bureau of Eligibility & Enrollment Policy, was introduced. Food Share Policy Updates-Stevey Poppe ABAWD Policy High Level Timeline Visual was shared. October 2023-March 2024: ▪ Timeline reinstatement: Current ABAWD members who had the time limit suspended during the PHE were phased back on to requirement and subject to TLBs after completing SMRF or renewal, whichever came first. ▪ ABAWD age range increase to age 52: Current members, age 50-52, are subject to FoodShare Work Requirement rules after completing renewal. ▪ ABAWD Geographic Waiver: ABAWDs living in qualifying areas continue to have the time limit suspended. October 2024 and Forward: ▪ ABAWD age range increases to 54: Current members aged 53-54 are subject to the FoodShare Work Requirement rules after completing renewal. ▪ Potential continuation of Geo-Waive, qualifying areas subject to change. ▪ January 1, 2025: New Food Share 3 Year Clock begins. *Reminder: If a case is eligible for the Food Share interview waiver, but there's an individual that's subject to the work requirements and there's no exemptions already identified, the worker must make at least one contact attempt to review the work requirements and exemptions.* DHS received federal waiver approval to allow electronic and telephonic signatures for replacement Food Share benefit requests. CARES changes are being implemented to support the waiver. The waiver will not start until October 2024. HealthCare Updates – Autumn Arnold DHS will no longer allow someone to apply on behalf of an incapacitated person. Direction from DHS Office of Legal Counsel has clarified that an incapacitated person maintains their right to			

	make financial decisions until someone else is formally designated to act on their behalf. An Op Memo will be coming out today or early next week. Summer EBT – Jonelle Brom On March 22nd, Wisconsin became the first State to have their 2024 Summer EBT plan approved by the USDA. The Summer EBT program will not be exactly the same as the P-EBT program. Families will receive $120 for each eligible child, and it will be a single lump sum payment. First issuance is expected to be in June 2024. Summer EBT benefits must be used within 122 days of issuance. Any remaining funds will be removed. IM agencies will not have a role in administering the program, but they will need to make referrals for those with questions. DHS will provide talking points to assist IM agencies. Tool: https://summerebt.wi.gov/s/SummerBenefitinfo Summer EBT application: https://summerebt.wi.gov/s/SummerEBTApp Help Center: dhsebtsupport@wi.gov Access Modernization & Check My Benefits Worker View – Jodi Noble With modernization of Access modules, the Check My Benefits worker view may no longer be available to workers. DHS is looking for feedback on what staff use this feature for to assist them in planning options if it's no longer available: • If a member states that they didn't get a notice or that access doesn't match what the IM worker is telling them. • To assist a member to unlock their Access account. • To assist an individual to learn how to use Access. • Used for fair hearings. If consortia think of any other things that they use it for, they are asked to email Jodi. With Time Limited Benefits back, the Food Share Gatepost question related to whether an individual between the ages of 18 and 52 received Food Share in another State has been turned back on. A CCN will be sent out next week. New system issue to be aware of – Seeing children in MAGC, who are certified for continuous coverage, failing for not verifying information (112/113 codes). They should not be failing for this reason and PRT is looking into what actions workers need to take. So far, actions have been case specific so they should be sent in to PRT.			

	While Cares isn't working well due to all the different policies right now, DHS expects these issues will be resolved when the unwinding ends. To assist workers, they will be moving forward to post temporary information in Process Help – known issues and steps to take to address.			
Unwinding Operations Planning Jonelle Brom Katie Sepnieski Alicia Grulke	Unwinding Coordinator Update – Alicia Grulke State LTE's are continuing to get hired to fill consortia openings. Western Consortium recently hired two. The statewide Call Center ASA decreased by 2 minutes from February to March. Are there policies and practices that have been in place during the PHE unwinding that have benefit in continuing after unwinding? DHS shared a Post PHE Unwinding Recommendations document that lists the policies that were implemented to assist during the unwinding. For each policy, DHS provided the Department's recommendation on whether it should continue, be modified, or stopped at the end of the unwinding. Consortia reps were provided an opportunity to provide feedback on each item on the list. There was discussion about the Food Share interview waiver. Some consortia reported that there's often still a need to make outbound calls to clarify unclear information, and the script is still required for some cases. Jonelle asked that written feedback around this be submitted so it can be further discussed at a Performance Monitoring subcommittee meeting. DHS asked whether consortia use the 481 Enrollment Report (Forward Health Enrollment Report). They do use the 481 Enrollment Report for data at budget time and for county-specific reports. Consortia confirmed that they do not use the new unwinding dashboard (can't drill down to information we need). DHS recommends going back to Cares System availability from 7am-7pm M-F and until 3pm on Saturdays. Consortia expressed interest in early hours based on staff preference for putting in extra hours early instead of later in the day.			

	Most of the additional groups and meetings that were set up to support the unwinding will end at the end of the unwinding. The monthly meetings that DHS has with each consortium will stop. The Weekly Consortia Leads Unwinding meetings will end, and materials from these meetings will be covered at the IMOA monthly meetings. The Unwinding Task force will end, but DHS is working to identify alternate channels to engage stakeholders. The IM Partner Workgroup meeting will also end at the end of the unwinding. DHS is working on a plan to use limited time at IMOA meetings quarterly to invite partners and advocates to cover items of common interest. Discussed the potential need to extend IMOA and prep to avoid case-specific or consortia-specific conversations when partners join IMOA.			
Genesys Update (Attachment) Paul Michael	Paul went through a power point covering the Genesys Cloud rollout schedule. Consortia rollout will be done in a phased approach. 7/11: Bay Lake, East Central 7/25 IM Central, Northern, Southern, Western, WKRP 8/8 Central, Great Rivers, Moraine Lakes 8/22 MILES Training will be rolled out as far in advance of the scheduled rollout date as possible. IT Stakeholder Information sessions were completed last week. A recording of the sessions is available. Local IT testing must be completed by June 1st. Contact information for technical questions is included in the power point. Paul Michael should be contacted if there are issues that need to be escalated. Feedback from consortia was that there are some counties that are requiring individual remote workers to complete the testing. Jonelle confirmed that this is not the intent for the testing.			
Security Update Carla Treuthardt	The annual systems audit cycle will be starting within the next couple of weeks. DHS is looking at online request systems, and they are utilizing a couple of consortia security officers to assist with testing. DHS is looking at solutions to assist with consortia requests for worker audit records. HMAR access would require statewide			

	access, which wouldn't be permitted as information must be limited to consortia level only. The requests focus on two different goals. Sometimes the request is to determine whether a worker accessed a specific case. Other times it's to more broadly audit staff activities during the day. The interest in this information has increased as more staff are working remotely. Some agencies are going through OIG to get information. Their information comes from Control D, but is keystroke level detail. Question was asked what the difference is between Control D, Tableau and HMAR. Control D provides canned reports (used to be EOS system reports). Reports are being transitioned to Tableau and IMMR. HMAW and HMAR are mainframe worker audit logs. HMAR shows up in Control D.			
CDPU Updates (Attachment) Robert Tillmon	Power Point was shared. The CDPU has identified a group of counties that they will be setting up regular touch base meetings with to make sure things are going well and address concerns as they come up. Consortia shared seeing untimely returned mail showing up on their dashboards from the CDPU. These have been emailed to the CDPU contact and DHS PRT. Robert shared that they have recently hired more staff at the CDPU.			
Unclear Rule Julie Taylor	Q & A document was reviewed and sent out with meeting materials. Implementation date is September 1, 2024. Consortia requested that the training plan be brought to consortia leads for review. Consortia would also like to see a more interactive training, not just an online video. DHS suggested maybe following up the training with a Q & A session.			
DEAR- Disabled Elderly Accessible Renewal (Attachment) Abbey Graf	Power point was sent out and reviewed. Project goal is to remove administrative burden for Food Share households that are deemed stable, with limited risk of having changes that must be reported. It would extend Food Share certification periods for DEAR households to 35 months with no interim reporting. Project implementation is planned for October 19th, with the October 2024 Cares Release. Attendees spent time in breakout groups reviewing the policy details and formulating questions for DHS. These were submitted in writing and sent to Alicia.			
Senior Care Auto Transfer Process Jodi Noble	Background: Because of the caseload structure for Senior Care Senior only cases, agency transfers cannot occur from an IM agency to the EM CAPO when IM programs close. CARES was			

	programmed to automatically transfer these cases to the EM CAPO after IM programs have been closed for 90 days. In the past, it was reported that this isn't happening, and it was determined if workers queried a case, the 90-day clock reset, and the auto transfer process wasn't working as it should. With Senior Care modernization in October 2024, this was raised as something to fix, so DHS is trying to determine if this is still an issue. **Is it still a problem if a case doesn't transfer back to the EM CAPO? If so, please describe** • Consortia receive more alerts and documents if the cases aren't transferred (social security alerts, returned mail etc.) • Skews consortia caseload numbers.			
Crosse Departmental Updates (Attachment Only)	Updated copy sent out with agenda materials.			
Future Agenda Topics (Attachment) Jonelle Brom	May – Safe at Home, Eligibility Management Homepage Redesign			
Next Meeting	Friday May 3, 2024 9:00 am – 12:00 pm			

Income Maintenance Subcommittee Key Messages
Call Center Operational Technical Subcommittee
April 8, 2024

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Outages/Issues and Enhancements	No outages or enhancements since last meeting.			
Tentative Timelines	Training: • Agent, supervisor, and admin training will be rolled out as far in advance of the scheduled rollout date as possible. • A training call flow is expected to be available to agents prior to rollout date. • General training (excluding ATS) will be available prior to any LOB going live. • Each LOB will have access to the platform approximately 60 days prior to their go live date.			

	• Agents will receive a 5-digit access code allowing them utilization of the training base, including the ability to take and make calls. Tentative Rollout Schedule: Most state LOBs are rolling out in the pilot and phase 1. LOBs that require ATS training will role out in phases 2 through 5. Consortia rollout will be spread across multiple phases to level out the number of agents rolled out at a time. • Pilot 5/16/24: WFCAP, Estate Recovery, PRT/DMS Training, EMCAPO • Phase 1 - 5/30/24: Enrollment Broker, IMQC, OIG, Summer EBT • Phase 2 - 7/11/24: Bay Lake, East Central, W2, Tribes, Katie Beckett • Phase 3 - 7/25/24: IM Central, Northern, Southern, Western, WKRP • Phase 4 - 8/8/24: Capital, Great Rivers, Moraine Lakes • Phase 5 – 8/22/24: MiLES/MECA, DMS Main Line			
IT Stakeholder Information Meeting	• Meetings were rescheduled to Monday, April 1, 2024 @ 1:00 and Thursday, April 4, 2024 @ 10:00. • Meetings were held to provide local county IT staff specific desktop, browser, network, and telecom requirements to support Genesys Cloud.			
Cloud Requirement Input Decisions	• Text and video chat options will not be implemented at this time to reduce the learning curve for agents and better manage the amount of training required to onboard agents. This may be implemented as a future enhancement. • Agent ability to add or remove themselves from a queue will not be implemented at this time to reduce the learning curve for agents, better manage amount of training required to onboard agents and better manage queue staffing. This may be implemented as a future enhancement. • Usage of After Call Work codes will be mandatory for MiLES and optional for balance of state. This option may be updated in future enhancements.			
Reporting Demo	• Paul Michael gave a short demo on Genesys Cloud reporting options. Information is "real time", no refresh time.			

	Historical and live reporting are on the same platform. • Reports can be downloaded in the moment or scheduled. • Agents will be able to see the status of any queue they are assigned to and will also be able to see their own status. • Queues will remain but agent groups will no longer exist. • Callbacks will be included in the inbound call queue. • Report will be Central Time Zone.			
Next meeting	Monday, April 29, 2024 @ 1:00 p.m. Contact information: DHSGenesysCloudProject@dhs.wisconsin.gov			

Income Maintenance Subcommittee Key Messages
Performance Monitoring Subcommittee
March 20, 2024

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
Intro/attendance	Roll call attendance was taken Introduced Valerie Hayes as new subject matter expert on Ashely's team		Ashley Schabel	
Recap Jan 2024 meeting	2024 charter reviewed-reminder to share desk aids or helpful guides with this group QC proposed rule and will keep the group updated FSQC error data 1.69 % August active CAPER 19.7 % Auth rep project that was completed in fall 2023 and reviewed errors and round table where suggestions were provided. WREA shared rep type desk aid with the group		Ashley Schabel	
Unwinding IM performance	Looked at the metrics that the state looks at month to month based on the calls we have with Alicia. Tracking staff unable to work at 100%, training in the cohorts, what LTEs are doing for the consortia, call center stats, ASA is under 10 minutes statewide, If wait time consistently high, DHS will reach out. Timeliness is excellent for application processing and renewal processing. SMRF is also very high. QC error rate remains low/good. CAPER also much below the Fed		Jonelle Brown	

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	level. 1 to 2 weeks lag in processing renewals. At April IMOA we will discuss temp policies and if they should be extended. Jonelle commended the agencies on performance through unwinding.			
PCR updates and feedback	Enhancements implemented in Feb Can assign cases to self School enrollment and immigration in driver flow County name now displayed on search results page Sups can choose all cases or any of the criteria Created review completed re-review status Feedback provided-find it clunky to use but did get good data from it. used info for trainings. Some holding off until after unwinding. Encouraged to give it a try if haven't for awhile as the enhancements have made it more user friendly. We would find it interesting to see Wisconsin's performance compared to other states.		Lisa Hanson	
Family Plan only (FPOS)	Concerns from another division in DHS about processing and requests for verification that don't align with policy. Eg: 14 year old FPOS -req HHC or parent's info Over 19 y.o. female apply for FPOS-pending HHC and spouse's info These have no impact on FPOS FSQC has not seen this come up recently. If concern PRT will review and reach out. May be some misunderstandings about FPOS.		Jody Noble	
Other PRT updates	Update from past things: Safe at home cases-report/all made confidential and if agency reached out, Jody provided the cases. Kids pending MAGC for insurance access but MAGE passing. Do we need to leave it passing until we get insurance info? connected with policy recently and agencies don't have to pend-can just pass the extension. Timeliness issues on cases-still researching. A lot of complexity. Can say: some situations-renewals trying to get all components of what is a timely renewal-still working on. Some things noticed: change of what comes in as		Jody Noble	

	renewal-the dates and then it changes. Then worker processes and it changes the work item to be sooner that it should-researching that. Other situation have seen-work items completed but then if we search it can't be found-says not a valid work item. Unsure of cause but probably contributing to the timeliness issues that we are seeing. LIS referral work items when processed to case are not dropping off the cases. working with Deloitte to determine root cause. Identified a fix that will hopefully be resolved in June fix. Some application timeliness issues are: worker did program add with a date in the past/didn't confirm, started a new program add with new date. Each filing date sets a new work item. If filing date is in the past it can cause a timeliness issue. that can cause cases to show up multiple times on the timeliness reports.			
Policy Check in	Admin renewals/ extensions not working correctly. This is problematic from a workload and customer service perspective. This is caused by policies being layered and CARES not responding well to that. Reviewing each one individually to make sure causes are being caught. Manually extended MAGP through PHE so the system isn't reading it correctly to put them into MAGE with rest of group. Kids aren't always going into extension. CARES should treat like a brand new ext, but it isn't always doing that correctly. Jody is reviewing each of these. Keep sending these in. PRT will provide guidance as to whether to extend. Case closed for lack of renewal-run elig and the other AG opening and passing. Trying to figure it out. if children are confirmed open, cannot close it. If worker catches it and doesn't confirm-send to PRT. Put signature to no and send manual notice.		Nicole Rolain	

	When renewal is completed-19 yo never open on case-over income. Entire family closed but 19 year old opened. Were directed to trust the system. Send things like this in-can copy Jody and Manhee if concerned about response. MAGM extensions for adults with no dep children are opening-send them in Disabled people going into MAGE-send them in. Handbook not yet updated for premiums-states no longer have to pay first premium at agency. PH update coming weekend 4/6. Initial payment doesn't have to be paid at agency. If agency receives it, may just send it in to be tracked. This is for CHIPS premiums. MAPP is TBD at this point. EBD/LTC meeting last year-if we need to request MSP for SSI members in CARES. Policy right now says we need to keep that request as a yes. This is until policy changes. CCN coming out 3/21/24 with this info			
MAGC 19-year olds	At conclusion of previous PERM/MEQC cycle one of the major errors was continuing 19 y.o under MAGC funding. Under corrective action. This should have ended with unwinding. Some are open with CEED in future. Some are not confirming elig closed even when they should be. Some have comments unable to confirm negative action. Some exceptioned out at batch. Alerts not being processed. As they are found-close them as appropriate as long as CEED is not in future. Is there a list to identify these members? May be one coming out soon for agencies to fix.		LaTanya Baldwin/Jody Noble	
Consortia Report	Handout- Trends-caseload is decreasing from peak in July 2023. Applications increasing until Feb when there was a decrease. 98.18 % app timeliness through Feb 2024		Donna King	
FSQC Error Findings	Handout- Didn't include Sept 7.43% ended with 4.89% active,		Dione Sanders	

	24.53 with cumulative 20.56% negative for overall 2023. Oct data for 2024 6.86 % active Wages/salaries, shelter, self-emp, HHC are top errors Arithmetic and unreported = top errors for wages/salaries Shelter-reported info disregarded or not applied HHC-withheld by client Negative 7.46% for October Verification, Wages/Salaries, Notices = top 3			
IMQA Error Findings	handout Top Jan/Feb 2024 3 errors Employment income not reported, Calculation, verification. If end of employment is questionable there have to be comments. Some errors could be avoided by checking budgets, double checking math and making sure all things reported on app are entered. Verification due dates were missed. Rep details: missing signatures, witness signatures, form not on file ACCESS updates-auth rep will require first/last names. Seeing duplicate signatures-when first and last names match-there will be an information banner displayed to inform the person there may be an error. Page level comments will be added. This is for June update. Confirmed assistance group summary-cert period renewal issues. Cert period ending when another renewal is being processed or verif being processed. SMRF not received but FS remained open. HC cert-extended erroneously when certain actions taken. Worker aligned dates with FS without renewal. Confirmed assistance group summary page-click on		Ashley Schabel	

	magnifying glass-can see history and make sure it's correct.			
Roundtable-Extending due date verifications	When partial verification is received before the due date: worker to call and if cannot reach add text to the VCL Partial verif received and agency is proc on due date or after the due date: if reach out/fail. HC may give them additional 30 days. Unclear or unreadable verification received-extend, give call. apply same as for partial. Reach out/add text. Extension request-how long? Give them what they ask or standard? 10 days is standard. Some consortia allow a max of 20 How do requirements differ at change, renewal/SMRF, application-SMRF-not past last day of 7th month, application-one time up to 10 days. Will be adding some info to Process Help		Ashley Schabel	
Walk on items/QC	Reviewing OP claims for timeliness and that ops memo is being adhered to. We will receive emails from corrective action if applicable. Unsure if there will be formal communication regarding this. Will use current email contacts to distribute-not through IMQA tool.		LaTanya Baldwin	
Future Agenda Items	Wisconsin's performance compared to other states. Next meeting 5/15/24		Ashley Schabel	