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## INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

May 16, 2024

1:00 – 3:30 p.m.

**Location:** Department of Corrections  
3099 E Washington Ave, Madison, WI 53704  
Perseverance Room

**Zoom Link:** <https://dhs.wi.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/John Rathman
1:05 – 1:10 PM	Approval of April 18, 2024, Meeting Minutes (Attachment)	Katie Sepnieski
1:10 – 1:45 PM	Department of Health Services Policy Updates	DHS Policy
1:45 – 2:05 PM	Subcommittee Updates (Attachment) <ul style="list-style-type: none"><li>Income Maintenance Operational Analysis (May 3)</li><li>Call Center Technical/Operational (not presenting)</li><li>Elderly, Blind, Disabled/Long Term Care (April 16)</li><li>Training (April 22)</li><li>Performance Monitoring (not presenting)</li><li>Fraud &amp; Program Integrity (not presenting)</li></ul>	John Rathman Ron Redell/Kara Ponti Mitch Birkey
2:05 PM – 2:15 PM	CARES Release <ul style="list-style-type: none"><li>Medicaid Purchase Plan (MAPP) (Attachment)</li></ul>	DHS Staff
2:15 – 2:20 PM	Income Maintenance (IM) Funding and Contract Updates	Alicia Grulke/John Rathman
2:20 – 2:25 PM	Consortia Feedback: IM consortia will share feedback with DHS	John Rathman
2:25 – 2:30 PM	Administrative Memos	Alicia Grulke/John Rathman
2:30 – 2:35 PM	Regional Enrollment Network	Lorie Graff
2:35 – 2:40 PM	Public Comment	All
2:40 PM	Announcements/Future Agenda Items	All

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\*If you want to participate by web meeting, you can follow along at your computer by logging in as a guest to <https://dhs.wi.zoomgov.com/j/1619409056> 5 minutes ahead of time.

**Income Maintenance Subcommittee Key Messages**  
**IMOA**  
**May 3, 2024**

Agenda Item	Message/Action/Motion	Assigned To/ Referred to IMAC	Deadline	Closure
DHS Policy/COVID-19 Updates	<p>Jonelle Brom welcomed everyone to the meeting and announced that Autumn Arnold will become the new director of BEEP. Jonelle also announced that Stevey Poppe will be leaving DHS and this will be her last IMOA meeting. Elizabeth Olsen is also leaving her temporary role with DHS. Stevey shared that the Foodshare interview waiver will be extended through August of 2024. A CCN will be published next week formally announcing this extension. Stevey reminded IMOA participants to continue to document interview waivers so we can get accurate data on how many interviews are formally waived. For adults who are subject to ABAWD work requirements, workers must ensure they make at least one attempt to reach them to properly screen them. Stevey also highlighted that ACCESS enhancements are being made to allow applicants to report participation in work requirements and document work exemptions. Enhancements being made in June will not be fully integrated with CWW and for the first three or four months workers will need to do some manual work to move information from ACCESS to CWW. Processing instructions will be sent out to workers in the near future. Autumn Arnold reported they are looking at ways to reduce Medicaid coverage issues for individuals turning 19. DHS will be sending a one-time letter to all individuals who aged off of a family case during the unwinding process that are not currently open for Medicaid coverage. DHS will also be sending a pair of letters to participants and their parents to all who will age off the program in the future so both have a clear understanding of what they need to do to maintain coverage. DHS does not currently have an estimate of how many of the one-time and on-going letters will be sent in July but will get that information for IMOA. Autumn also highlighted that MAPP premiums will resume starting in August. A formal presentation for the resuming of premiums for MAPP will be given at IMAC this month. Communications will start to be sent to MAPP participants in June. Two different letters will be sent. One to members under 100% of poverty stating no premiums, and one to members over 100% alerting them that premiums will resume starting in August. Autumn also</p>	IMOA Members	On-Going	

	<p>highlighted that premium amounts are now different than they were in the past due to a change in State policy. More people will now have premiums (100% of poverty versus 150% of poverty), but in general most individuals will pay a lower premium than they had in the past. Autumn also highlighted that CMS has asked the State to remove their restricted re-enrollment period. Premiums are due on the 10<sup>th</sup> of the month. If not paid by then, they will receive a letter telling them they have until the end of the month to pay. If no payment by end of month, a client will lose their coverage for the next month but they will no longer have a restricted re-enrollment period. If reapplying the next month, they will not need a new application, but if a full month of closure occurs, a new application will be needed. This new policy is anticipated to create more churn of clients. DHS confirmed that agencies can update the premium page if they do receive a local MAPP premium. Clients can also pay premiums on-line. Autumn asked members if Genesys messaging on MAPP premiums would be helpful to add. Initial response was probably yes, but could other messages be removed to reduce waiting time. Autumn also alerted everyone that May renewal mailings were delayed by a few days, but still were sent out in plenty of time for timely completion. Jody Noble noted that there are kids that are open for both BadgerCare Plus and for CLTS waivers when they shouldn't be. Some are paying premiums that they should not be and DHS is working on getting this corrected. Jonelle Brom reported that summer EBT educational sessions for schools have been completed and DHS is currently working on preparing communications for families about the program. Jonelle encouraged consortia to direct families to their website for more information about the program. Summer EBT benefits are replaceable very similar to regular Foodshare benefits. 75% of families receiving Summer EBT benefits are existing Foodshare benefit members. Jonelle reported they are currently looking for 3 to 4 IM workers who are familiar with benefit replacements to help them prepare information on the replacement of Summer EBT benefits. Those interested in this workgroup should notify Alicia Grulke.</p>			
<p>DEAR – Disabled Elderly Accessible Renewal</p>	<p>Abbey Graf highlighted a few of the questions about the DEAR program. Abbey highlighted that there will be several indicators in CWW highlighting that a case is a DEAR case or was a prior DEAR case. Cases will also show if they were never a DEAR case. Abbey highlighted that DEAR households do need to be</p>	<p>IMOA Members</p>	<p>On-Going</p>	

	<p>contacted annually but many will not require any action. Agencies highlighted that most of these clients will call even if they have no actions to complete, so the annual letters will create workload. Abbey also highlighted that if only one person in the household is homeless the household could still qualify for the DEAR program. If all individuals in the household are homeless than they will not be eligible for the DEAR program. Abbey highlighted that even though some members might not need to do a DEAR annual renewal many will still have to do a Medicaid renewal. Just every third year they will need to do both a Foodshare and a Health care renewal simultaneously. Household's part of the DEAR program will not be able to request to do an early renewal. CARES and ACCESS will be programmed to prevent early renewal completion. Abbey reported she will be back next month to answer additional questions.</p>			
Unclear Rule	<p>Julie Taylor highlighted that Unclear Systems changes will be covered in July, today's questions only focus on policy. Julie highlighted that applicants and members face no changes in reporting responsibilities. Julie reported that significantly conflicting information is when information required to be submitted is omitted, mis-reported or misrepresented. Julie also highlighted that 60 days is defined as 2 calendar months. If information received is less than 2 calendar months old, it must be acted on if it is within this timeframe and is information that is required to be reported. Julie highlighted that Foodshare verification requirements have not changed. Verification is the use of information from a third party source, which sometimes includes data matches. Julie also reported that if reported changes come in, the worker needs to evaluate if it is information that does or does not need to be acted upon. Julie reported another document is going to be created with step-by-step procedures to help workers implement the Unclear Rule. Julie did screen share an additional step-by-step document with IMOA members that will be sent at the completion of the meeting. Renee Kurka asked IMOA members for input on the training that would be helpful to implement the new Unclear Rule. IMOA members asked that the training focus on each program, including Child Care, and the differences that might exist. Members also asked that the training include many examples, include cheat sheets, provide opportunities for staff to ask questions, and allow for a follow up training a few months after implementation.</p>	IMOA Members	On-Going	

Safe at Home	Katie Quaintance highlighted that CWW will be enhanced to include a checkbox to indicate that a member is a participant in the Safe at Home program. The system will also be enhanced to include a Safe at Home PIN. Safe at Home members will also be given a choice to enroll in an HMO or choose fee-for service coverage. Income Maintenance workers will now be able to search for Safe at Home cases when needed. These changes will go-live with the June, 2024 release.	IMOA Members	On-Going	
Foodshare Work Rules and Work Requirements Script	Craig Hayes highlighted that CWW will be enhanced so that individuals who are subject to Foodshare Work Requirements will get scheduled a Foodshare Script for when a new household member becomes an ABAWD work registrant or when the case is completing a Foodshare renewal. Katie Quaintance highlighted that no changes are being made to the actual Work Requirements Script. Katie also highlighted that two new options are being added to CWW to track contacts – contact attempted – unsuccessful and contact attempted – no valid contact number. IMOA members asked if the Work Requirements Script could be built into the Genesys system. Paul Michaels reported that no current plans are to do this, but that it is something that can be considered for the future.			
Caseworker Policy Assistant	Ariana Zukergood reported that the Caseworker Policy Assistant is an Artificial Intelligence-powered tool that will aid caseworkers in answering scenario-based policy questions. This tool will help increase accuracy for Medicaid, Foodshare, Child Care and W-2 Programs. Workers will still need to verify information supplied by the Caseworker Policy Assistant. The Caseworker Policy Assistant can answer general policy questions, case-specific questions and follow-up questions. Rosanna Caponi gave a demonstration of the AI-tool. Presently the tool will search all five handbooks and it does take a bit of time for the computer to come back with the answer. It is not as quick as a Google search. The tool is constantly learning. Once the tool answers the questions, it also provides handbook references on where to find the source information. DHS reported that right now there are no plans to add additional sources like CCN's, process help, and other guidance documents to this tool. This tool will become part of CWW, so eventually it should have voice recognition abilities. The tool has been programmed to avoid all PII and will not save any question that contains any PII and will alert the user they need to ask a question without any PII in it. This tool will help staff	IMOA Members	On-Going	

	but it will never replace staff. A pilot of this tool will begin on June 7 <sup>th</sup> and statewide implementation will not occur until after we get a successful pilot.			
Eligibility Management Homepage Redesign	Laura Grulke-Rueter reported that the public eligibility management homepage has been updated and redesigned. Changes were made to the page to help IM workers find information quicker and more efficiently. Laura reviewed the draft updated webpage with IMOA members and asked for feedback on the new organizational structure. IMOA members asked if CCN's could be added but DHS clarified CCN's are not public documents and are directed only to IM agencies. Members asked if the Forward Health Portal could be included and if a link to forms could also be included in the top portion of the webpage. It was also suggested to add the Forward Health User Guide. Laura will send IMOA members screen shots of the proposed webpage and additional feedback will be scheduled at an upcoming unwinding meeting.	IMOA Members	On-going	
Mass UNPIN Project Update	This presentation was delayed until the June IMOA meeting.	IMOA Members	<i>June 7, 2024</i>	
Unwinding Operations Planning	Jonelle Brom highlighted that most consortia are still using overtime to keep up with workloads. Jonelle highlighted that call center wait time continues to decrease across the state. Jonelle reported that LTE's are starting to move out of these time-limited positions to take permanent positions. Jonelle also shared with IMOA members a draft document of how we would incorporate IM partner agencies into quarterly IMOA meetings (February, May, August, and November) for the 30 final minutes of these meetings. August 2024 would be the first meeting we would hold a Partner/IM portion of IMOA. IM Partner agency representatives will be managed as a separate list, they will not be incorporated into the IMOA distribution list. Topics discussed at the quarterly meetings will be reviewed and vetted by DHS and the Tri-chairs and a presentation lead will be identified. Case specific discussions will not be handled at these meetings, those will be referred to the appropriate consortia leadership. Discussions with IM Partner agencies will occur over the months of May and June. If all agree, topics will start to be solicited for the August, 2024 IMOA meeting.			
Genesys Update	Paul Michael shared the Genesys project rollout schedule with IMOA meetings. Trainings will be rolled out as far in advance of	IMOA Membership/DHS Staff		

	the scheduled rollout date as possible. A training call flow is expected to be created and shared well in advance. Consortia will get access to the new platform at least six weeks before rollout. As of yesterday, the agent section of the new user guide has been published. On the 15 <sup>th</sup> of May, Cornerstone training for agent and supervisors will be published. The supervisor section of the user guide will be published on May 28 <sup>th</sup> . In June process help will sent out via CCN and then will be published later in the month on the website. Phase 2 of the rollout will start on July 11, Phase 3 on July 25 <sup>th</sup> , Phase 4 on August 8 <sup>th</sup> and Phase 5 on August 22 <sup>nd</sup> .			
Future Agenda Items/Next Meeting Date	Agenda items for our next IMOA Meeting include; Policy updates, Genesys update, Unwinding Planning, Mass UNPIN Project Presentation and Online Foodshare Request Presentation. The next IMOA meeting will take place on <i>Friday, June 7th</i> .	IMOA Members/DHS Staff	<i>June 7, 2024</i>	

**Income Maintenance Subcommittee Key Messages**  
**EBD/LTC**  
**April 22, 2024**

<b>Agenda Item</b>	<b>Message/Action/Motion</b>	<b>Audience/Recipient</b>	<b>Assigned To</b>	<b>Deadline</b>
Changes to who can sign behalf of incapacitated adult	OPS Memo 24-07 released. Much discussion on this change. Will need guidance from DHS on to handle these applications, renewals etc. Talked about impacts to courts, APS units etc. Send cases examples and questions to State PRT email; Jody Noble will look at this as well. DHS may send out Q&A document to Consortia.		DHS	
LTC overhaul update	Elisabeth gave an updated, where this at, what we are working on now and potential time line.			
Question of spousal income allocation amount	Elisabeth—question to group. Do we calculate the remainder of what is left after deductions for PP and show this amount as the allocated income? Overall, no. System updates needed, what if no allocation is needed- cost share already \$0.00, budget should be true and accurate. If you say yes to allocation, it will show as much as can be allocated to maximum even if the PP's income is less than that amount.	EBB/LTC workers		
Update on testamentary trusts	If this is set up in spouses will, benefit of spouse but spouse has no access and spouses passes before applicant, there is no divestment and it is considered unavailable.			

June maintenance items	<p>*Increase in Personal Needs Allowance for LTC Nursing home cases, to \$55.00 eff 07-01-24.</p> <p>*Prevention of MAPP failure confirmation when case pends for MS/NS programs.</p> <p>*Adding disability forms to manual letters: MADA, ADDED, and ADDMD. Will have cover letter, and can choose any 1 or all forms to send.</p> <p>*Increase in the non-spousal family maintenance allowance cost share deduction for member's children not living with community spouse. Will now be linked to 100% FPL.</p>			
Walk-ons/future topics	<p>Immediate annuities and this process.</p> <p>Best practice for Group A waiver cases open in CWW</p>			

**Income Maintenance Subcommittee Key Messages  
Training  
April 16, 2024**

Agenda Item	Message/Action/Motion	Audience/Recipient	Assigned To	Deadline
IM Training Project Updates	<p>Reviewed handout of training updates since 1/22/2024</p> <p><b>1. Updated Training:</b></p> <p><u>January (2):</u> Case Maintenance Concepts Change Processing and IM Refresher Training Proper Use of Dates</p> <p><u>February (3):</u> Precertification Review Tool for PCR Reviewers, FSET Orientation and Enrollment Supportive Services and Referrals to the FSET Program</p> <p><u>March (2):</u> IM Refresher Training SWICA Discrepancy Resolution and IM Refresher Training FoodShare Residency and Joint Custody</p> <p><b>New Training:</b></p> <p><u>February (8):</u> BadgerCare Plus Extensions Issued EBT Cards Dashboard, Out of State EBT Transactions, Returned EBT Cards Dashboard, EBT Expungements Dashboard, EBT Transactions Search Report, Large EBT Transactions Dashboard, FoodShare Overpayment Claims Compromise Tool</p> <p><u>March (5):</u> Fair Hearings Introduction, Fair Hearings Pre-Hearing Activities, Fair Hearings Walk-Through, Fair Hearing Example, COVID Unwinding: Reinstatement of Premiums for BadgerCare Plus Children</p>	<p>Examples: All Income Maintenance Agencies, ESPAC, Operational Leads</p>	DHS	



	<p><b>Upcoming Training:</b> LTC Curriculum Redesign (April), Self-Employment Updates (May/June), Genesys Updates (May/June), LTC Learning Library &amp; Advanced Scenarios (TBD)</p> <p><b>2. Genesys Training:</b> May through July roll out. Required CBTs for agents (10 sections), supervisors (3) and admin (3) with a publish date is approximately 5/15 but subject to change based on project decisions. These are still in design so exact time is not known but it is not expected to be more than 10 minutes per topic for ESS. There will be an automated telephonic signature training published as well. Pilot will have 30 days prior to “go live” date to access training.</p> <p><b>3. LTC Redesign</b> Publish date will be 4/30/24. The EBD workshop is required if NOT currently an EBD ESS. The existing LTC curriculum will be removed on 4/30 – staff currently in LTC NW training must have it completed by 4/30. A training announcement to be issued. There are 7 sections (Introduction, LTC Programs, Spousal Impoverishment, Divestment, Undue Hardship, Advanced Topics and Conclusion). The estimated total time frame is 24 hours to complete (which includes the scenarios). Survey added to end of curriculum to provide feedback to DHS Training. Experienced staff can take this as refresher and would not need to take all the modules – aka no hard stops</p> <p>Phase 3 (Advanced Scenarios and LTC Learning Library topics) will be coming as soon as possible with a target of 2024 release</p> <p>Big thanks to the LTC workgroup for all their time/feedback in creating the new product.</p> <p><b>4. Refresher Topic Prioritization Survey</b> The top 4 topics are Medicaid Special Status (46%), Medical Health Insurance Coverage Page (46%), Burial Assets (38%) and Withdrawals from IRAs &amp; Lump Sum Payments (31%).</p>			
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	<p>** DHS was already in process of creating the Special Status refresher based upon feedback from co-hort participants.</p> <p>DHS would like feedback on what is needed for these topics (what are workers struggling with, what should be included, specific examples). Please send feedback on topics 1 and 2 within 3-4 weeks via DHS inbox. Feedback on items 3 and 4 will be covered at July IMAC Training meeting.</p> <p><b>5. New Worker Updates and Reminders</b></p> <p>Coaches Guide has been republished with added information on contingency for missed sessions as well as adding a syllabus. Syllabus was added in April Co-hort for trainees. Enhancing visuals in co-hort (more PPTs and desk aids) May 2024: New IM course catalogue in Cornerstone will help learners and trainers find/identify materials – available in coaches corner as well as searchable. The catalogue will have ALL course listed (NW, refresher, etc). The catalogue will also be organized by program topic.</p> <p><b>6. Feedback</b></p> <p>Survey questions have been changed to improve/enhance data/results. Surveys gather what was most valuable as well as improvements recommended.</p> <p>Response rate for coach feedback has increased from 25% to 73%.</p> <p><u>Trainee Feedback:</u></p> <p>Most valuable elements for staff (3): Desk aids and resources, shadowing local ESS, and hands on activities. Trainee enhancement recommendations (3): End of day recap, technical issues (zoom), timing (too fast and too slow). DHS has taken action on first 2 items and continues to evaluate timing concerns</p> <p><u>Coach Feedback:</u></p> <p>Identified gaps in training: No topic areas were identified. Concerns on validation review and ESS not receiving feedback on their “wrong” answers/results. Concern was raised that detail information on each trainee is not provided. Improvements needed for ways for learners to capture homework assignments. Requests were made for detailed syllabus. Overall appears to be a positive response to VILT training. DHS has taken action on these items and continues to evaluate concerns. IMAC Training group members requested that all survey responses are provided</p>			
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	<p>at meeting and not just “highlights/key themes”.</p> <p><b>7. Wrap Up</b></p> <p>There were no walk on items.</p> <p>Roundtable topic for July 2024 meeting will be strategies local agencies take to assist learners in pace of training. Included in this will be discussion on best practices for contingency plans when staff miss VILT sessions and/or local agency activities.</p>			
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