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### INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)

**October 17, 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 PM | Welcome | Katie Sepnieski/Lorie Graff |
| 1:05 PM | Approval of September 19, 2024, Meeting Minutes (Attachment) | Katie Sepnieski |
| 1:05 – 1:35 PM | Department of Health Services Policy Updates | DHS Policy |
| 1:35 – 1:50 PM | Subcommittee Updates (Attachment)<br>• Income Maintenance Operational Analysis<br>• Call Center Technical/Operational<br>• Performance Monitoring<br>• Training (Not presenting)<br>• Elderly, Blind, Disabled/Long Term Care (Not Presenting)<br>• Fraud & Program Integrity (Not presenting) | Lorie Graff<br>Kris Weden<br>Ann Kriegel/Nicole Rolain |
| 1:50 - 1:55 PM | Income Maintenance (IM) Funding and Contract Updates | Alicia Grulke/ Lorie Graff |
| 1:55 – 2:00 PM | Consortia Feedback: IM consortia will share feedback with DHS | Lorie Graff |
| 2:00 - 2:05 PM | Administrative Memos | Alicia Grulke/ Lorie Graff |
| 2:05 - 2:10 PM | Regional Enrollment Network | Lorie Graff |
| 2:10 - 2:15 PM | Public Comment | All |
| 2:15 - 2:20 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://dhswi.zoomgov.com/j/1604519247, 5 minutes ahead of time.

| Agenda Item | Message/Action/Motion | Assigned To/ Referred to IMAC | Deadline | Closure |
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| DHS Policy-<br>DHS Staff | **ABAWD Work Requirements - Change to Allowable Good Cause Hours**<br>Effective 10/1, there will no longer be a 40-hour limit on good cause hours that workers can apply towards a member's TLB month.  This change will be communicated through a CCN and an Operations Memo will be released in November.  Process Help, Food Share and FSET handbooks will be updated.<br><br>**COFA/Pacific Islanders Eligibility for Food Share**<br>The Consolidated Appropriations Act, signed into law 3/9/24, extends eligibility for Food Share to COFA/Pacific Islanders with no 5-year wait limit.   If they applied on or before 3/9, they may reapply.  They may also request a fair hearing and, if found eligible, they can receive retroactive benefits.  Operations Memo with details on this change will be released 11/7.   There are less than 100 impacted cases, which may or may not include a Food Share request.<br><br>**Replacement of Stolen Food Share Benefits**<br>The Federal Continuation Resolution, signed on 9/26/24, extends the authority to replace stolen Food Share benefits to 12/20/24.  The deadline for requesting replacement benefits is 1/19/25.<br><br>**MAPP Updates**<br>• PRT is finalizing troubleshooting tips and plans to send out the CCN with RAQ's next week.<br>• PRT is working on further written guidance to clarify MAPP premium waiver policy (in response to consortia request).  This may not be ready to include in the upcoming RAQ's.<br>*Known Issues PRT is working on-*<br>    o Cases where premium waiver is in CARES but not being applied/picked up.  A report with 87 individuals who need to have their case opened will be sent to consortia on Monday.<br>    o Cases with duplicate MAPP EFT deductions.<br>    o Cases where waiver cost share is not getting zeroed | | | |

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| | out when the IM agency reinstates the MAPP premium (*February fix planned).<br><br>**Other PRT Updates:**<br><ul><li>Cares Bulletin is coming out on Monday with more information to support Operations Memo 24-25 *Electronic and Telephonic Food Benefits Replacement Requests*</li><li>PRT has received lots of questions on Operations Memo 24-22 *Food Share Application Time Frame*. CCN will be coming out early next week.</li></ul> | | | |
| CARES MyWisconsin ID MFA (Attachment)- Jason Eberhardy | Jason attended IMOA as a follow up from their August 2024 presentation to answer any questions that consortia may have.<ul><li>Q- In some counties the IT contact for Income Maintenance is different from the IT contact for other county CARES users (ex – CLTS). Will the State (DHS/DET/DOA) be reaching out to these other county IT contacts as well?<br>A - Jason will take this information back so they can look into what contacts they have.</li></ul> | | | |
| Heating Season Updates – Jane Blank | <ul><li>Jane announced that she will be retiring in January 2025.</li><li>There was a 3.5% drop in caseload for FFY 24.</li><li>Next week will be the first extraction for FFY 25. They expect to serve 185,000 individuals with heating assistance this season.</li><li>Two counties have decided not to administer Energy Assistant beginning with the FFY 25 (10/1) heating season-  Milwaukee County and Green Lake County.</li></ul> | | | |
| CDPU Updates (Attachment) – Robert Tillmon | <ul><li>The CDPU has added two additional staff. They are now at a total of 36 staff.</li><li>70% of their physical mail is returned mail.</li><li>They are just below the volume of documents received back in 2018, and the majority are coming  in as Scan First from counties.   Consortia indicated that this aligns with the increased walk-ins they are seeing at local agencies.</li><li>A few issues they are seeing with documents from counties:  large volume of documents scanned in one batch,  multiple applications in one batch, incorrect case numbers, process first documents that include only an RFA, multiple codes entered on one document, multiple forms of ID on one document.</li></ul> | | | |

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| | • Sasha Johnson, the CDPU's new trainer, was introduced. Counties can reach out to her with any issues: Sasha.Johnson@wisconsin.gov.<br>• Rob's contact information - Rob.tilmon@gainwelltechnologies.com<br>• Rob will be working with DHS to get an updated list of contacts for consortia/counties.<br>• DHS is looking into whether there's a training on Cornerstone for county staff responsible for scanning documents. | | | |
| Security Updates-Carla Treuthardt | • The annual CARES audit is going out over the next week.<br>• Reminder that users can be removed using the audit spreadsheet, but new users can't be added without submitting a new user request form.<br>• The annual audit is required by CMS, and the LAB audits the annual process. | | | |
| Genesys Update(Attachment)<br>• Call Center Closure Discussion | • Paul was not able to join meeting – he continues to work on transitioning the remainder of consortia to Genesys Cloud.<br>• Call Center Closure Discussion –<br>   o Following discussion, a decision was made that consortia do not need permission to close their Call Center due to technical issues. However, consortia must still email Jonelle to notify her when they are closing their Call Center. DHS will send out formal communication and guidance, with tri-chairs reviewing a draft before it's sent out. | | | |
| Remote Work Policies & Best Practices | ***Discuss consortia policies, best practices and technological opportunities agencies have in place to continue to support remote work environments –***<br>Consortia shared current status of remote work:<br><br>Western- Hybrid across all counties. Some counties require staff to work in the office during training. Installed virtual interview rooms during pandemic, but they haven't needed them.<br><br>Southern- Not all counties allow remote work. In counties that do, they have staff rotating through the office.<br><br>WKRP- 75% Remote. Staff are required to work in the office during training and first year. If there are performance issues, staff are brought back into the office for support. | | | |

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| | East Central- Similar to others with hybrid models, but there are differences between counties based on county board support. The expansion of CLTS, and resulting lack of office space, is encouraging remote work for ES in some counties.<br><br>Moraine Lakes- Most counties are 50% or more work from home, with a hybrid model. Most county boards have been supportive, and they've also seen support for work from home due to space limitations.<br><br>Great Rivers- More counties are looking at 100% remote. Eau Claire County is 100% remote. They've seen that if staff struggle with productivity at home, they have the same struggles if they are working in the office.<br>Capital – Remote with rotation into the office for Dane County. Policies vary in other counties and this has caused some friction in counties where staff can't work remotely at all. They've also seen staff in partner counties interested in working for Dane County.<br><br>Bay Lake – Five counties and five different remote work policies. Brown County is remote due to space issues. They also have not seen any difference in productivity between staff working at home or in the office. Brown has attracted staff from other counties, but they also have limitations on the distance that employees must live from the county office.<br><br>** Consortia asked DHS for improved HMAW/HMAC reports that can be exported to Excel to support worker productivity audits. | | | |
| Employee Disclosures – OIG Staff | Lots of feedback and questions were presented to OIG staff in response to their recent request for a list of CARES users with their DOB's, and signed disclosure forms listing relatives receiving benefits.<br>• With Carla's team already doing an annual audit of CARES access, consortia would like to use this report to complete OIG's request for users.<br>• If consortia already have protocols in place, do they still need to use the disclosure forms that were created to support MILES policy?<br>• Are we expecting employees to ask their family and friends if they are receiving benefits? Degree of relation?<br>• Does DHS have a policy that applies statewide?<br>• Consortia believe, absent something in contracts or | | | |

| Agenda Item | Message/Action/Motion | Audience/Recipient | Assigned To | Deadline |
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| | statute, they would need to work with county Corp Counsels and HR to disclose employee SSN's.<br>• The request from OIG should be sent to consortia leads, not individual county HS Directors.<br><br>OIG provided more background on the request. The request is a result of a risk assessment done where this was identified as an area of high risk.<br><br>*OIG will work with DHS to review the request in light of the questions and feedback. Refined directions will be re-sent. DHS will also provide an update at IMAC and OIG may be invited back to IMOA for follow up.* | | | |
| Future Agenda Topics (Attachment) | Monthly – Policy Updates(standing agenda item), Genesys Updates<br>Quarterly – Partner/Advocate Discussion (TBD for November), OIG<br>November 2024- Discussion: SWICA's, W2 Update, Admin Renewal Project<br><br>** Capital requests an update on Emergency Assistance during W2 update. | | | |

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**Income Maintenance Subcommittee Key Messages**
**Call Center Technical/Operational**
**September 30, 2024**

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| Agenda Item | Message/Action/Motion | Audience/Recipient | Assigned To | Deadline |
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| Callback | Customer First Callback is in production. Implementation to consortia is planned after all phases are completed. | | | |
| Rollout Schedule Update | Transition to GCCX will occur on the dates below. Calls will go live on GCCX the following day.<br><br>• 10/10 Phase 3 – IM Central, Southern, WKRP<br>• 10/17 Phase 4 – Western, Northern, Great Rivers, Moraine Lakes<br>• 10/23 Phase 5 – Capital, MilES/MECA, DMS Main Line, | | | |

| | Summer EBT | | | |
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| Project Schedule | The vendor has resolved nearly all issues associated with ATS recordings, fine tuning the ATS file transfer process and allowing for significant queue times.  Issues that are not resolved are scheduled to be resolved shortly.<br><br>**All Phase 3 users should log into GCCX the week of 9/30/24.*<br><br>Phase 3 transition call centers have a touch base meeting scheduled on Monday, October 7, 2024 @ 3:00 p.m.  The walk-through will include a review of Admin Functionality including assigning agents to queues, business events and reporting.  The meeting will be recorded for anyone unable to attend.<br><br>A bridge will be created for each phase on the first day taking calls in GCCX.  The bridge can be used in the event there are major issues affecting the call center. | | | |
| MGEP Recording Retention | The process of syncing MGEP recordings with the state storage has begun.  Businesses will be given advanced notice as to when process will be put into production. | | | |
| Next Meeting | Monday, October 14, 2024 @ 1:00 p.m. | | | |

**Income Maintenance Subcommittee Key Messages**
**Performance Monitoring**
**September 18, 2024**

| Agenda Item | Message/Action/Motion | Audience/Recipient | Assigned To | Deadline |
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| RECAP of July 2024 meeting-See July Key Messages for more detail | • Policy check in-verifications for SEI-We should only request applicable schedules by type reported<br>• Actions needed for Representative type-error prone<br>• Reviewed June reports-caseload down, timeliness up<br>• QC report types document shared<br>• Utilities cost project 752 errors on 800 cases | PM subcommittee | Molly Thomas | n/a |

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| | Wheap question and end month not updated; not recommended to put in $1<br>• FS/HC error findings-reviewed top errors<br>• WI final error numbers shared- no sanctions for WI<br>• Interview strategies-scripts, interview refreshers, training plans-some new staff never done these | | | |
| Recent Policy check in | • EVFE-good for 30 days even if no paychecks in between, this is confirmed as Yes-if no changes in income; will be added to PH-takes time<br>• Given rent amount by customer and entered by IM, error on MER when FSQC got utility cost through landlord; is this an error even though only FSQC is required to get this level of verification?  IM would not verify unless questionable-Yes, this is a known inconsistency and FSQC considers these client error for failure to report | PM subcommittee | Ann Kriegel | n/a |
| **Book Keeping Records-** acceptable for verification for SEI? | • If info needed to determine eligibility is on schedules/forms-those should be accepted.  Some don't file taxes even though they should then book keeping could be accepted.  If customer submits verification only request additional verification if it's questionable | | Jody Noble | |
| Early ACCESS renewals | ACCESS was updated to include a banner for early renewals.  ACCESS only allows submission of early FS renewals if the customer is doing a renewal for HC (or another program).  Banner lists the consequences for renewing early including potential loss of benefits.<br><br>If an early renewal is submitted for HealthCare-it MUST be processed.<br><br>If an early renewal is submitted for FS and meets criteria in FSHB 2.2.1.2 it HAS to be processed.<br><br>If an early renewal for FS is submitted and does not meet the criteria in 2.2.1.2, it MUST be removed and withdrawn after making any needed updates for changes reported and documented in comments. (The system is not always | | Jody Noble | |

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| | stopping these)<br><br>Some noticed these may show as untimely on the FSoD tool-if it meets the criteria for a shortened certification period-Proceed with processing (do not delay processing) | | | |
| TLB clarification for additional months | IM training not aligning with policy-policy needs to be clarified- 3.17.1.8 FSHB; intent for them to align-wording in policy isn't clear and being interpreted differently by workers.<br>Example<br>Used all 3 TLBs, lost FS and are reapplying<br>Can get FS again if they met work requirement for 30 consecutive days at any time between loss of eligibility and reapplying even if they are not meeting at the time of application<br><br>FSHB 3.17.1.9-who can get additional months? if they lost eligibility and then met work requirement for 30 consecutive days at any point before reapplying they get 3 additional months of TLB<br>Will clarify when customer gets additional months in policy-likely updated in December in FSHB | | Jody Noble | |
| Consortia Reports | **Monthly Consortia Report-August of 2024**<br>• Caseload trending downward<br>• Applications-average 99.32% timely<br>• Renewals-over 95% timely<br>• SMRF-all consortia met timeliness<br>• NOTES on GENESYS data-<br>Answer rate for all-technical issues impacted data and performance | PM subcommittee | Donna King | |
| FSQC Error Findings | • April active errors increase to 4.88% over March at 2.85%; FFY 24 cumulative 4.16%<br>• Wages and salaries highest 43.37%, shelter deductions 11.88%, other unearned income 10.10%<br>• Negatives at 10.94% in April which slightly reduced cumulative to 16.06%<br>• Notices/verifications at 37.14% each; wages and salaries 12.86% | PM subcommittee | Dione Sanders | n/a |

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| HCQC Eligibility Errors | Top 3 errors<br>1. Confirmed assist group Summary(12)/override AG renewal/review dates(12)<br>   a. Duplicate pins (11)<br>   b. Cert period incorrect (13)<br>2. Representative details (18)<br>   a. No form on file (7)<br>   b. Witness signature missing (8)<br>   c. Type (3) -organization vs individual<br>3. Employment (21)<br>• Pay frequency incorrect-3, verification-11, pretax deductions-3 | PM subcommittee | Angela Stanford | n/a |
| IMQA-Special Projects team Error findings | Top 3 May-Jul 2024 (700 less reviews-other project with tribes)-1058 reviews<br>1. Employment errors-<br>  a. paystubs not in ECF or in ECF but not updated   on case, no comments for why only 2 paystubs were used<br>  b. average hours not matching gross to account for differentials -how to calculate in PH-      NOTE: only 5 errors for unreported wage increase-this is down from 50 last NOV- great progress!<br>2. Confirmed AG sum-cert periods, HC, Renewals<br>3. Rep details-witness signature, not on file, misc. | | Ashley Schabel | |
| Roundtable discussion and feedback sharing | How are we maximizing capacity to accomplish workload-Overall Consortia are struggling to keep up with high workloads post unwinding and having difficulty getting to everything-alerts etc.<br>CHALLENGES EXPERIENCING:<br>• FS interviews added and MAPP premium issues-consuming unexpected amounts of time<br>• Tons of FS apps-needing to allocate additional staff regularly<br>• Verification due increase-20-day due dates, verifications on denials, increased workload and SWICA work adds to QV<br>• Call center volume is very heavy-not enough resources<br>• Staff turnover, overtime-some lacking funding<br>• Worker errors-glad they have reduced-need to keep in mind that we are in survival mode<br><br>SOLUTIONS/STRATEGIES IMPLEMENTED: | PM subcommittee | Ann Kriegel | |

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| | <ul><li>Over time incentives-an WFH if do at least 4 hrs of OT Sat before</li><li>Waukesha has 2 hours Wed/Fri reserved for processing item-Keep a document to list cases that need processing- updated manually<br>Helps to see in real time to see when a case pulled and completed, avoids cherry picking-can see if they do all 10 on their list-visible accountability.  Easier to identify who and when they staff can help with something else<br>Will share document template with group</li><li>ALERT Strategies-individual caseloads</li><li>Assign out-and expect staff to do them when they find on cases</li><li>Assigning on call center, walk ins-certain alert numbers that are quicker, simpler</li></ul> | | | |
| Future Agenda items | <ul><li>Number of FS renewals listed on FSoD tool differs from number on dashboard-unsure why-send examples to PRT to look into</li></ul> | Consortia | Co-chairs | TBD |