

ISM

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CARES Worker Web The Incremental Renewal Approach

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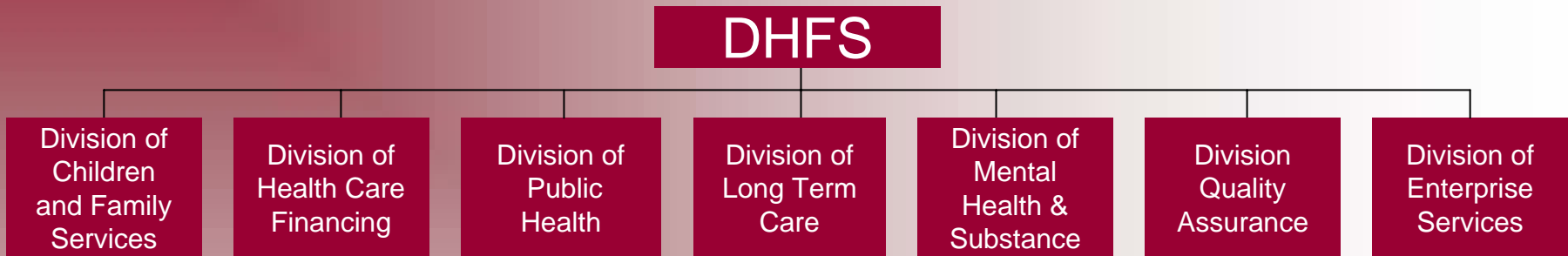
**WI Department Of Health and Family Services (DHFS)
Division of Health Care Financing (DHCF)
Bureau of Eligibility Management (BEM)**

Presentation Overview

- DHFS Background Information
- The Vision
- DHFS Technology Environment
- The Approach



Wisconsin DHFS Organization



- Bureau of Disability Determination
- Bureau of Health Care Program Integrity
- Bureau of Health Care Systems & Operations
- Bureau of Eligibility Management
- Bureau of Fee-For-Service Health Care Benefits
- Bureau of Managed Care Programs

Major Areas of Responsibility

- Medicaid Eligibility Policy
- FoodShare (Food Stamps) Eligibility Policy
- CARES Support
- ACCESS Support
- County Eligibility Agency Oversight
- SeniorCare
- Eligibility Waivers
- Legal Proceedings
- Forms and Instructional Materials
- State Data Exchanges
- Coordination/DWD on Economic Support
- Outreach & Program Implementation



DHFS Background Information

Wisconsin's Medicaid and FoodShare programs are state-run, county administered

DHFS FTE	5,883	Eligibility Determination Agencies	83
DHFS FY '07 Budget	\$6.6 Billion	Eligibility Workers and Support Staff	4,000
		Core System Users	1,500

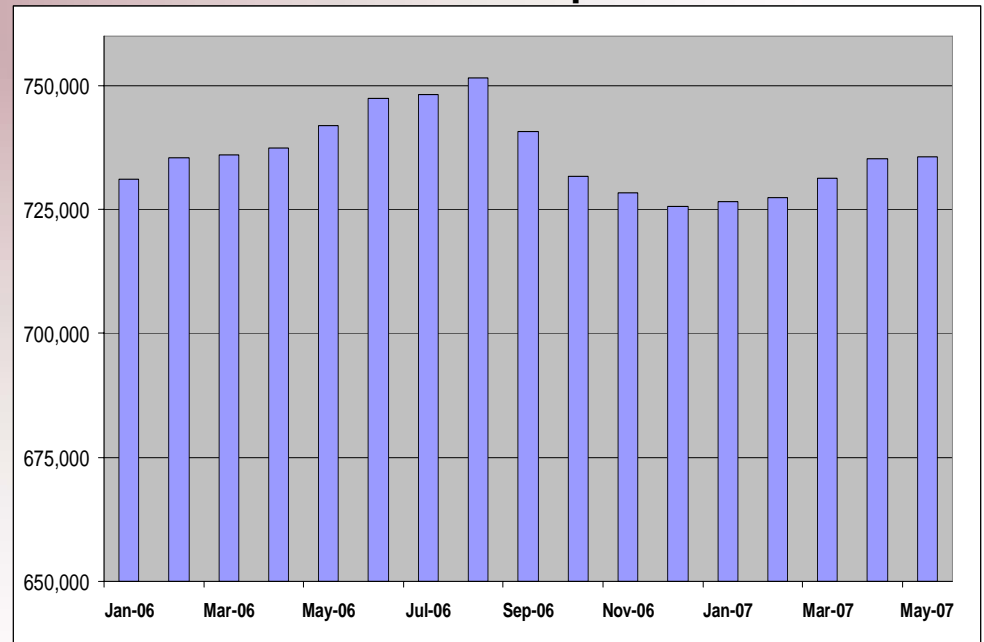
Open Cases/Recipients by Program

Program	Cases	Recipients
FoodShare	162,099	381,434
Medicaid (non-SSI)	398,026	735,553
SSI-Medicaid	N/A	103,239
Caretaker Supplement	6,157	12,077

Monthly Benefit Payments

Benefit Program	Monthly Total
FoodShare	\$30,608,146.00

Medicaid Recipients



DHFS Vision's Business Drivers

- ❑ Reduce Workload on Local Agency Eligibility Workers and Reduce Overall Administrative Costs
- ❑ Improve Payment Accuracy in Medicaid and FoodShare
- ❑ Improve Customer Service and Increase Participation in the FoodShare Program



Reduce Workload on Eligibility Workers

Process Improvements

- Increase automated support to reduce Economic Support (ES) workload and allow workers to focus on customer needs and program integrity
 - Reduce the amount of time ES workers spend responding to client inquiries (ex. application status, review dates, EBT balances, etc.)
 - Reduce the time it takes ES workers to perform data entry activities
- Make policy and other information more accessible to workers

Proposed Approaches

- Introduce web-based tools for data collection
- Provide an easy to use, central repository of policy information and integrate it with worker tools for data collection and modifications
- Increased the automation of verification and use of external sources
- Provide an electronic case file for maintaining verification and other documents
- Provide tools for clients to enter and query data to reduce ES workload



Increase Payment Accuracy Rate

Process Improvements

- ❑ Improve change reporting process
 - Make it easier for clients to report changes
 - Process the changes in a more consistent and efficient manner
- ❑ Improve data accuracy through online data exchanges
- ❑ Enhance data collection and eligibility processing capabilities
- ❑ Leverage options available through the FS Farm bill to reduce the FS error rate

Proposed Approaches

- ❑ Provide a web-based tool to clients for application and change reporting
- ❑ Develop a independent driver flows in CARES Worker Web
- ❑ Enhance CARES data exchange capabilities
- ❑ Automate the update of data through external services
- ❑ Modify the FS program certification and review process (semi-annual reporting)



Improve Customer Service

Process Improvements

- ❑ Introduce new channels for clients to apply for services, view program and benefit information, and report changes
- ❑ Increase the accessibility of information on programs and policies to clients
- ❑ Simplify review process to increase Medicaid and Food Stamp retention
- ❑ Increase automated referrals between systems to reduce data duplication
- ❑ Improve client communication

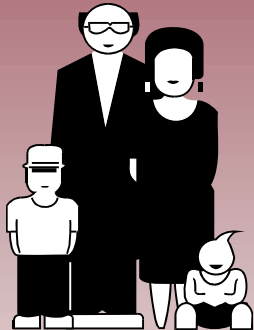
Proposed Approaches

- ❑ Create a self-service web site to provide program information, online applications, and access to data and change reporting
- ❑ Integrate systems and provide automated referrals (example: LTCIA & CARES)
- ❑ Provide increased automation support for programs and services
- ❑ Improve process for letters and notices (including exploring electronic communication)



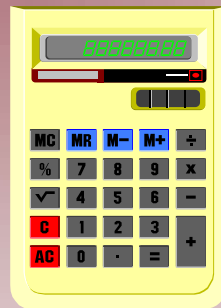
Key DHFS' Eligibility Business Functions

Step 1



Client
Registration &
Application

Step 2



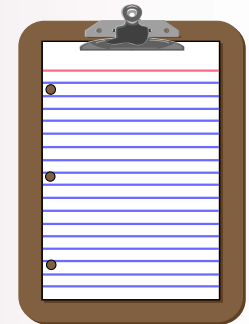
Eligibility
Determination
& Benefit
Calculation

Step 3



Benefit /
Payment

Step 4

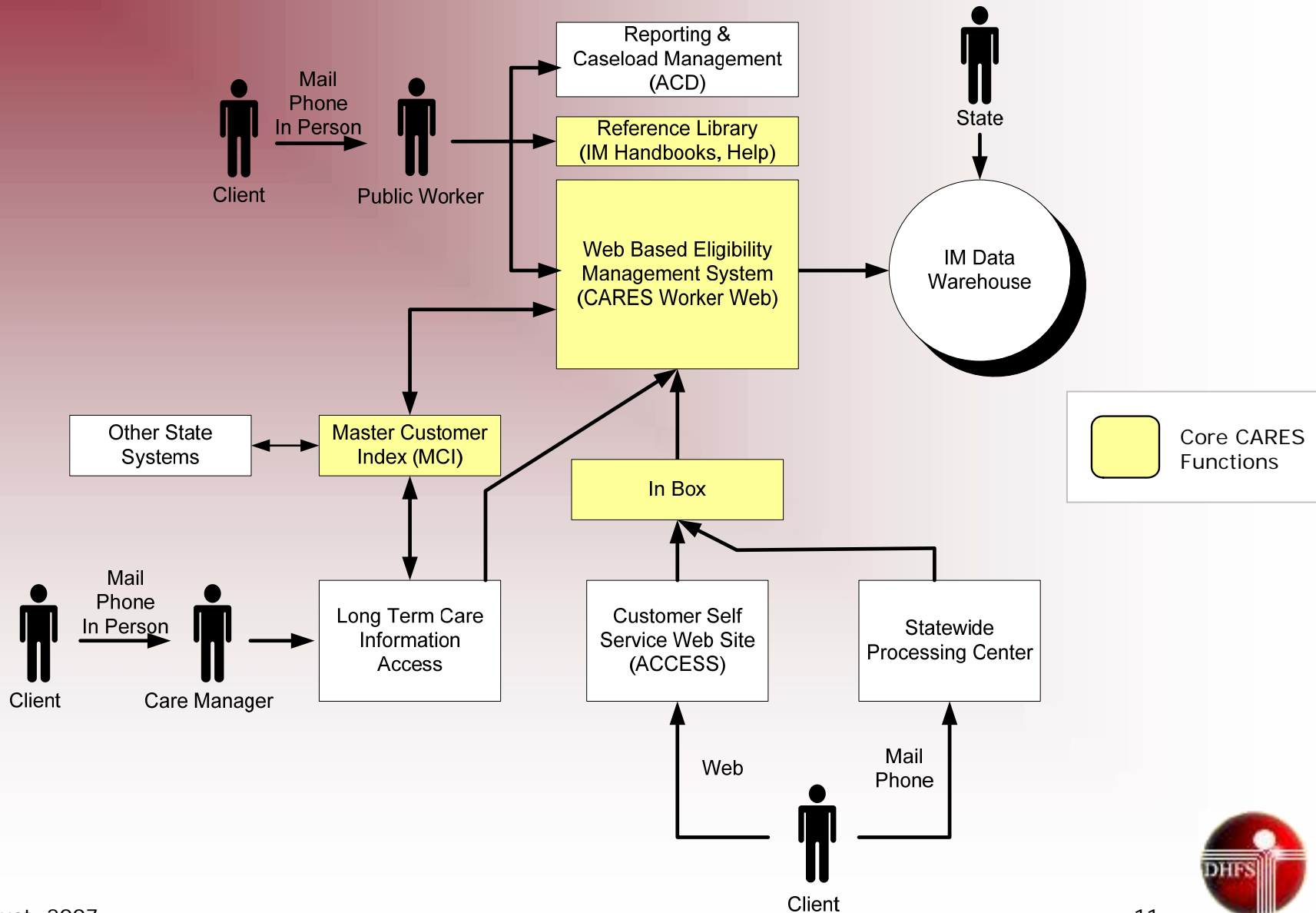


Case
Management,
Monitoring &
Review,
Notices

These functions are automated and supported by CARES systems



Technology and DHFS Business Drivers: The Vision





The CARES System

- ❑ **Client Assistance for Re-Employment and Economic Support (CARES)**
- ❑ **Go Live: July, 1994**
- ❑ **Initially automated eligibility:**
 - AFDC, Medicaid, Food Stamps
- ❑ **Currently supports the following programs across two departments (DHFS and DWD):**
 - Medicaid
 - FoodShare (federal Food Stamp program)
 - Wisconsin Works (W-2) (TANF)
 - Caretaker Supplement
 - Child Care
 - Long-Term Care programs
 - Medicare Premium Assistance (QMB/SLMB)
 - SeniorCare (prescription drug program)



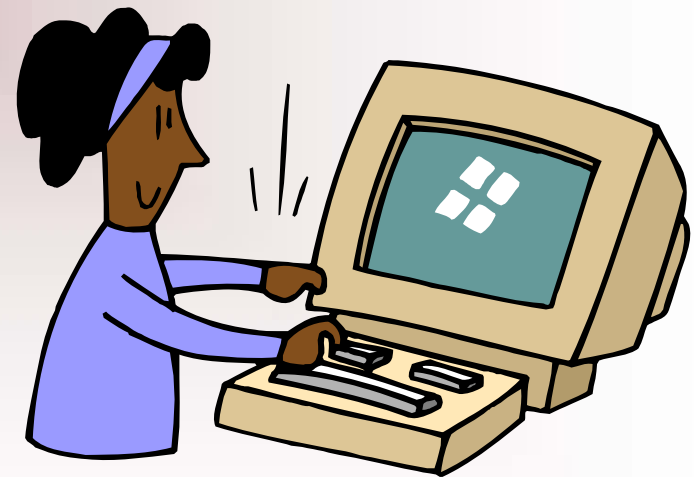


Who Uses CARES?

- Local agency workers (Income Maintenance & Work Programs)
 - Income Maintenance (IM) Eligibility Workers
 - W-2 Workers
 - Child Care Workers
 - Work Programs Worker
 - Family Care Resource Centers
 - W-2 Sub-contractors

- State and contractor staff
 - SeniorCare CAPO Staff
 - CARES Call Center
 - Monitoring and QA Staff
 - State Policy and System Staff
 - CARES Contractor Staff

- Inquiry users
 - Child Support Workers
 - MMIS State and Vendor Staff
 - Phone Company Users





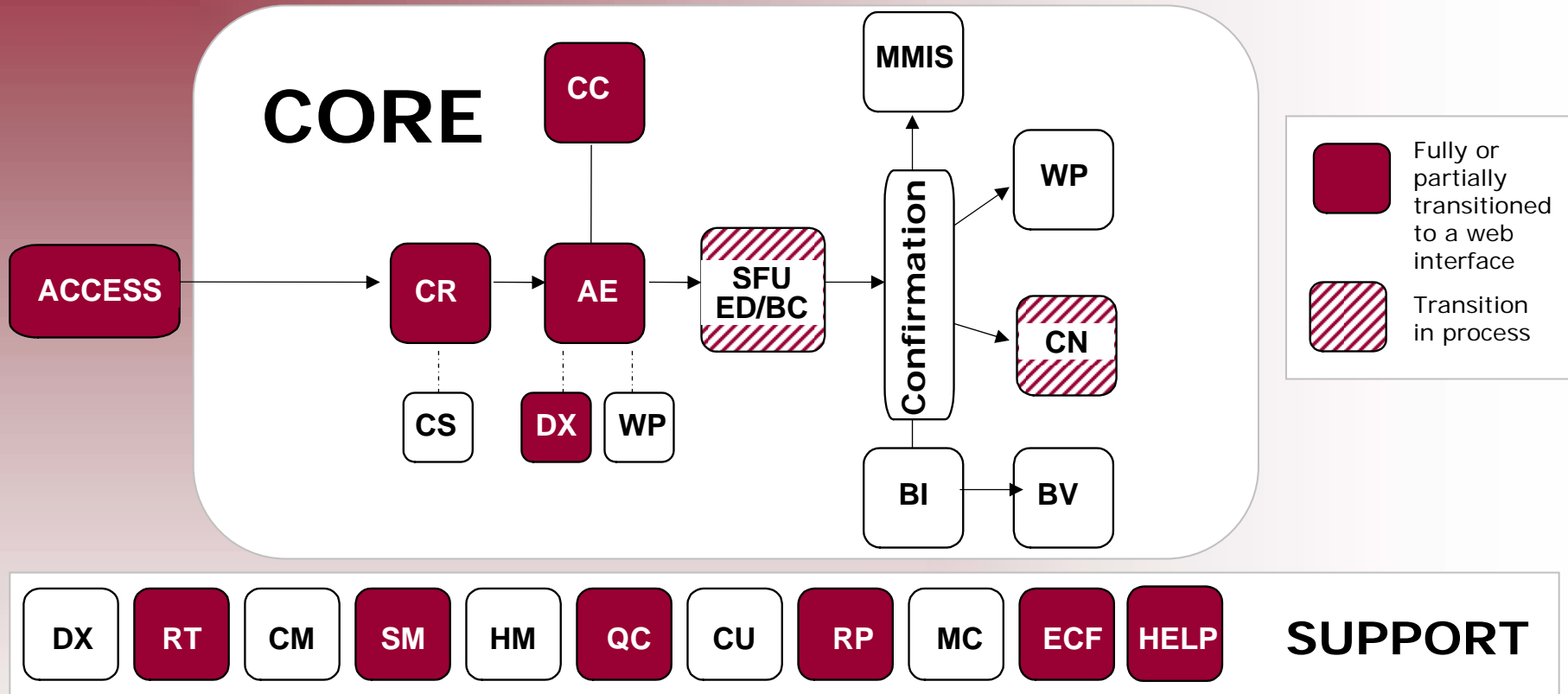
CARES Functional Breakdown

- CARES has 26 subsystems, organized under 7 general areas:
 - **ACCESS Customer Self-Service Portal**
 - Am I Eligible, Check My Benefits, Report My Changes, Apply for Benefits
 - **Applicant Processing**
 - Client Registration, Application Entry, Standard Filing Unit, and Eligibility Determination/Benefit Calculation
 - **Case Management**
 - Client Scheduling, Client Notices, and Caseload Management
 - **Financial Information and Control**
 - Benefit Issuance, Child Care, and Benefit Recovery
 - **Management Information and Control**
 - Reports and Quality Control
 - **Employment and Training**
 - Work Programs
 - **Support Functions**
 - Mass Change, Data Exchange, Reference Tables, History Maintenance, Security Maintenance, IVA/IVD Interface, MMIS Interface, Caretaker Supplement, and Electronic Case File





CARES Functional Breakdown



ACCESS	ACCESS Portal	CS	Client Scheduling	MMIS	MMIS Interface
AE	Application Entry	CR	Client Registration	MC	Mass Change
BI	Benefit Issuance	CU	Common Utilities	QC	Quality Control
BV	Benefit Recovery	DX	Data Exchange/Interfaces	RP	Reporting
CC	Child Care	ED/BC	Eligibility Determination	RT	Reference Tables
CM	Caseload Mgt.	HM	History Maint. (Audit)	SM	Security Maint.
CN	Client Notice	WP	Work Programs	ECF	Electronic Case File

The OLD CARES – Mainframe View

SESSION1 - EXTRA! Personal Client

File Edit View Tools Session Options Help

CRIN RFA INFORMATION 07/14/03 09:01
COUNTY/TRIBE: 40 XCTD97 L ASHMORE
RFA NUMBER: CASE: STATUS: PENDING
WORKER: _____ OFFICE: _____
INFORMATION FIRST MI LAST LANG LIVES ALT MAIL
SUF IND IN HH ADDRESS
PROVIDER: _____
RFA DATE: 07 14 03 RFA TYPE: ____ REFERRAL SOURCE: ____ CONTACT METHOD: ____
NUMBER UNIT DIR ST/RURAL RT/BOX# SUF QUAD APT
HOUSEHOLD ADDRESS: _____
ADDITIONAL ADDR INFO: _____
CITY: _____ STATE: ____ ZIP: _____
PHONE: _____ CENSUS: ____ REGION: ____

DO YOU WANT CARES TO SCHEDULE AN INTERACTIVE INTERVIEW FOR THIS RFA ? : ____
FILING DATE: ____ DELAY REASON (IF FILING DATE LATER THAN RFA DATE) : ____
RFA STATUS: P REASON: ____ EXTENSION DATE: ____ EXT REASON: ____
NEXT TRAN: _____ PARMS: _____
4B :00.1 04/10
Connected to host infotech.state.wi.us [198.150.235.253] (VTCC1ECZ) NUM 10:06 AM

The NEW CARES –Web View

CARES Worker Web

User ID: XCTD97 User Name: S MANDEL Quick Select: CASE/RFA

Primary Person : DONNA SIMPSON 39F PP Case: 2000027661 Status: Open Mode: Review

03/15/2006

Navigation Menu

- CARES Worker Web
- ▣ CARES Home
- ▣ Search
- ▣ Inbox Search
- ▶ Client Registration (0)
- ▼ Application Entry (1)
 - Case Summary
 - ▶ Case Information
 - ▶ Individual Demographics
 - ▶ Benefits/School
 - ▶ Individual Non Financial
 - ▶ Long Term Care
 - ▶ Asset Information
 - ▶ Employment / Unemployment Queries
 - ▶ Employment
 - ▶ Unearned Income
 - ▶ Expenses
 - ▶ Medical
 - ▶ W-2/Child-Care
 - * Eligibility Access
 - ▶ Query
 - ▶ Worker Tools
- ▣ CARES Mainframe Access

Case Summary Reset

Summary Information

Primary Person: **DONNA SIMPSON 39F PP**

Contact Information

Household Address:	430 W MAINDF ST 402 MADISON WI 537033198	Alternate Address:	430 W MAIN ST 403 MADISON WI 537033198
Phone:	000-000-0000	Phone:	

Office / Filing Information

Office: **MILW CO DSS (5040)**

Agency: **40 - MILWAUKEE COUNTY**

Assigned Worker: **ASWIN BALASUBRAMANIAN (JX2328)**

File Location: **IN - INTAKE**

Caseload: **1413**

File Location Date: **02/17/2003**

Case Information

Language: **E - ENGLISH**

Last Review Date:

Next Review Date: **05/31/2006**

Case Closed Date:

Case Web Status: **WEB**

Associated RFA Information

RFA Number	Agency	Contact Method	RFA Status	Contact Date	ACCESS App
0000484903	40	Mail	INDIVIDUALS PROCESSED	11/17/2002	

What would you like to do?

Workflow Options	Case Maintenance
<input checked="" type="radio"/> Continue with Driver / Navigate Through Completed Pages	<input type="radio"/> Reactivate Case
<input type="radio"/> Add Person	<input type="radio"/> Transition Mainframe Case to Web Case
<input type="radio"/> Begin Review	<input type="radio"/> Initiate, Resume, or Terminate Simulation
<input type="radio"/> Record New Group Level Program Request	<input type="radio"/> Change Primary Person
<input type="radio"/> Process Group Level Program Request	<input type="radio"/> Make Case Confidential





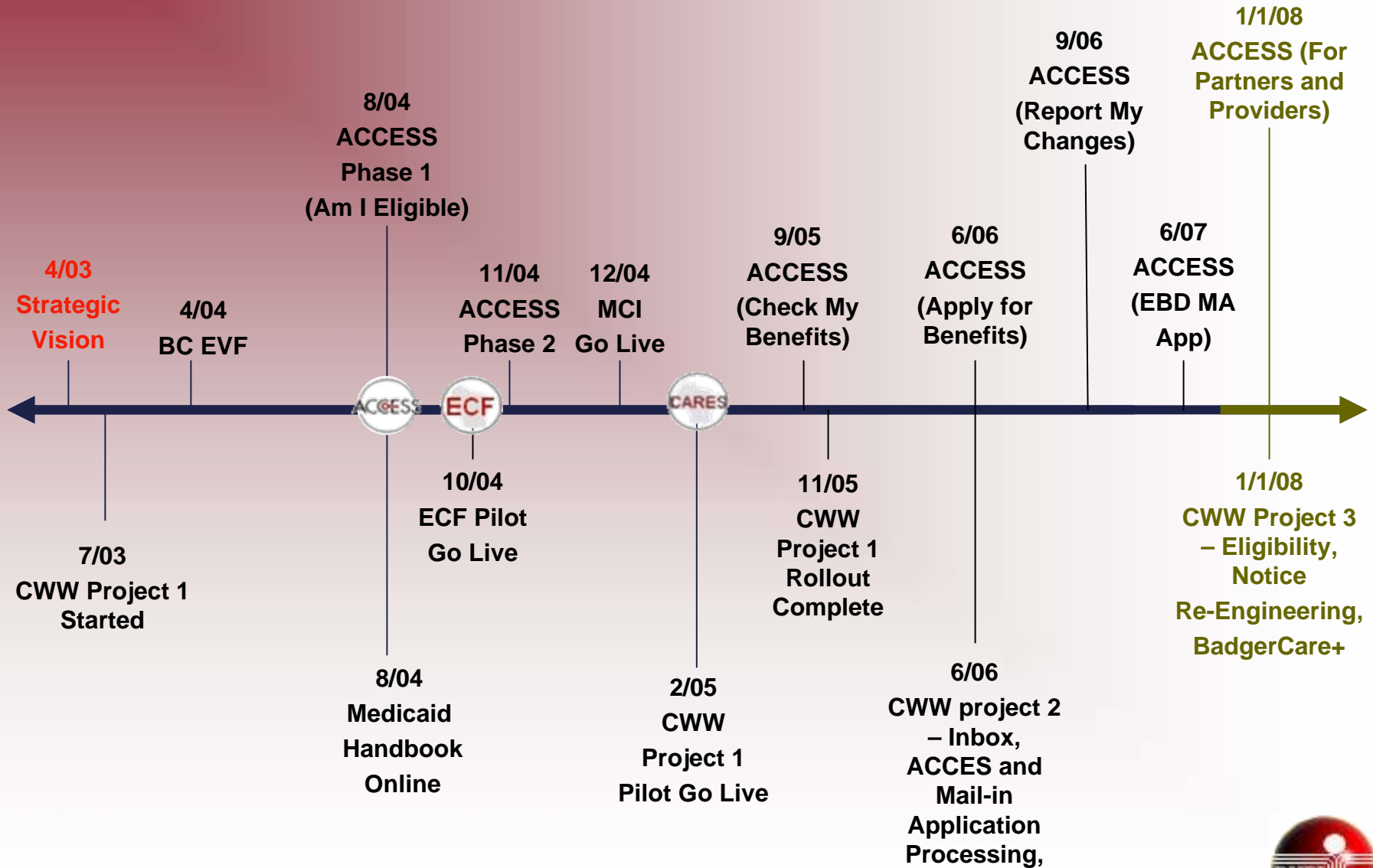
CARES Worker Web (CWW)

- ❑ Incremental renewal approach for moving CARES to the Web
- ❑ Leverages current CARES assets and investments
- ❑ Designed with a visually appealing and intuitive user interface
- ❑ Provides a time saving tool to workers that is easy to learn and use
- ❑ Phased rollout approach that incrementally implements (and replaces) CARES mainframe functionality to CWW

- ❑ Results: DHFS anticipates an annual workload savings of \$1.5M with the CWW



DHFS Strategic Plan Timeline





CWW – Project Timeline

□ CWW Project 1

- Vision/Conceptual Requirements 07/2003 – 12/2003
- Detailed Requirements / Design 12/2003 – 05/2004
- Development 05/2004 – 10/2004
- Testing 10/2004 – 02/2005
- **Pilot Go-live 02/28/2005**
- Other Pilot Implementations 03/2005 – 06/2005
- Statewide Rollout 06/2005 – 11/2005

□ CWW Project 1.4 *(Eligibility Query, Asset Assessment, Child Support Summary, Child Care Six Monthly Renewal Form)*

- Implemented January 2006

□ CWW Project 2 *(Inbox, Processing ACCESS applications, mail-in apps)*

- Implemented June 2006





CWW Project 1 – Approach and Scope

- **CWW Project 1 (Live statewide since November 2005)**
 - Redesigned Client Registration Module
 - Built in Search features to avoid duplicate individuals/requests and utilizes Master Customer Index (MCI) functionality
 - Redesigned screen workflow to better align with county business processes
 - Design Improvement in Application Entry
 - Intelligent Driver Flow - collects only required data based on household composition and program(s) requested
 - “Relevant” Household Members
 - “At-A-Glance” Summary pages
 - Provides powerful navigation menu and integrated data exchanges
 - Reviewed all existing data collection pages within Client Registration and Application Entry and evaluated each screen and question from a policy, systems, and reporting perspective
 - Limited database and data changes were required
 - CWW Project 1 consisted of over 140 Web pages and over 3,300 total components. Over 100 CARES mainframe screens were moved to the Web.





CWW – Architecture/Platform

- ❑ J2EE Architecture
- ❑ AIX Server platform running Websphere ND
- ❑ Leveraging existing CARES DB2 database
- ❑ Web Services for interfacing with MCI, Unemployment Insurance (UI), Employer/Wage Query, and Finalist Address Validation
- ❑ Used several open source applications such as iText, JLog, Quartz, and Sudo
- ❑ Utilizes State's enterprise security solution, WAMS, for single sign-on
- ❑ Simultaneous use of Web and mainframe facilitated through use of HATS and WAMS
- ❑ Established 1,500 V-User load testing environment using Mercury Load Runner
- ❑ Leveraged Deloitte Consulting's eligibility solution framework from the State of Texas





CARES Worker Web Challenges

- ❑ End-user Buy-in
- ❑ Inter-Departmental Cooperation (DHFS, DWD, Counties)
 - Hosting, networks, workstations, etc.
 - Business requirements
- ❑ Budgeting and Financial Resources
- ❑ Aggressive Timeline, High Visibility
- ❑ County infrastructure issues
- ❑ Training / Implementation
 - Distance Learning
 - Skills Assessment
- ❑ Coordination with CARES mainframe
 - Backend processing, planned enhancements





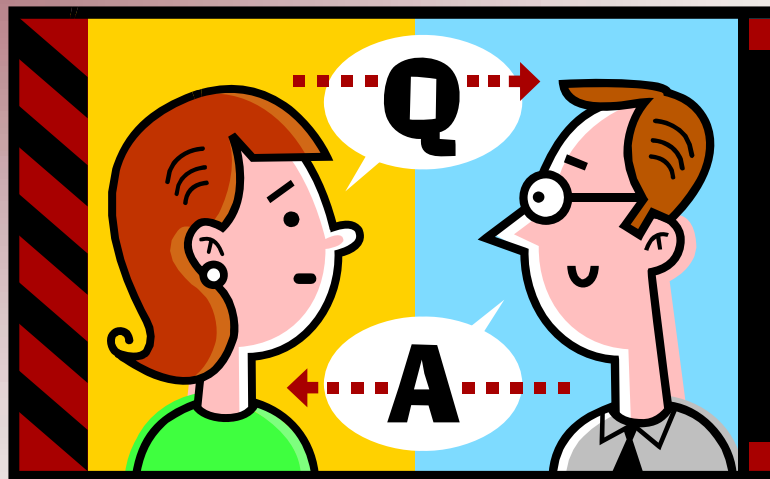
CARES Worker Web (CWW) – Today

- ❑ Consists of over 1,000,000 total (open and closed) cases as of today
- ❑ Handles around 275,000 transactions per day

Type	Web Pages	Converted M/F Screens
Client Registration	8	12
Application Entry Data Collection	69	96
Application Entry Support (DX, Simulation, Query, Worker Tools, etc.)	32	33
Summary Pages	23	N/A
New Functionality (Child Support Summary, Mail-In Pages, Inbox, Relevance, etc.)	48	N/A
System Support (Logout, System Error, Profile Selection, Downtime, etc.)	6	N/A
Program Budget Pages (Release Date: 1/1/2008)	23	51
Total	209	192



Questions



Appendix

Appendix



CWW End User Feedback Approach

- ❑ Served as repository of CWW details for front-line workers to review and provide comments during early stages of the project
- ❑ Interactive web site with
 - Mock-ups of new pages
 - Screen cams of pages/process
 - New process-related changes
 - Pointed questions about specific functionality
 - Open ended feedback questions
- ❑ Marketing and communication about CWW to end-users



Summary Pages Key Features

- ❑ Various sections based on corresponding detail pages
- ❑ Display of key pieces of information
- ❑ Magnifying glass to link to particular sequence
- ❑ Clock icon to load pop-up of effective month summary
- ❑ Record navigator to filter by individual, Begin Month, and Updated Date to determine which records were considered by eligibility



Sample Summary Page

CARES Worker Web

User ID: XCTD97 User Name: S MANDEL Quick Select: CASE/RFA

Go Help Logout

Primary Person : DONNA SIMPSON 39F PP Case: 2000027661 Status: Open Mode: Review 03/15/2006

Navigation Menu

- CARES Worker Web
- ▣ CARES Home
- ▣ Search
- ▣ Inbox Search
- ▶ Client Registration (0)
- ▼ Application Entry (8)
 - ▣ Case Summary
 - ▶ Case Information
 - ▼ Individual Demographics
 - Summary
 - ✓ Permanent Demo
 - ✓ Current Demo
 - ▣ Alien / Refugee
 - ▶ Benefits/School
 - ▶ Individual Non Financial
 - ▶ Long Term Care
 - ▶ Asset Information
 - ▶ Employment / Unemployment Queries
 - ▶ Employment
 - ▶ Unearned Income
 - ▶ Expenses
 - ▶ Medical
 - ▶ W-2/Child-Care
 - * Eligibility Access
 - ▶ Query
 - ▶ Worker Tools
 - ▣ CARES Mainframe Access

Individual Demographics Summary

Permanent Demographics

Individual	Last Updated	Language	US Citizen	Birth Place	Date of Death	SSII Appl Date	Alert Flag 1	Alert Flag 2	
DONNA SIMPSON 39F PP	07/20/2005	ENGLISH	Y	WISCONSIN					🔍
NORMAN SIMPSON 42M HUS	07/20/2005	ENGLISH	Y	WISCONSIN					🔍
JANE SIMPSON 15F DAU	06/14/2005	ENGLISH	Y						🔍
CATRINA SIMPSON 14F DAU	02/24/2005	ENGLISH	Y	WISCONSIN					🔍

Race / Ethnicity Information

Individual	American Indian / Alaskan	Asian	Black / African American	Hawaiian / Other Pacific Islander	White	Hispanic Ethnicity	
DONNA SIMPSON 39F PP	Y	N	N	N	N		🔍
NORMAN SIMPSON 42M HUS							🔍
JANE SIMPSON 15F DAU	N	N	N	N	Y	Y	🔍
CATRINA SIMPSON 14F DAU							🔍

Current Demographics

Individual	Begin Month	Last Updated	SSII Coop	Marital Status	Intent to Reside	Reside in WI	Migrant Worker	CC Special Needs Child	
DONNA SIMPSON 39F PP	07/2001	07/25/2001	Y	MA	Y	Y	N	N	🕒 🔍
NORMAN SIMPSON 42M HUS	07/2001	07/25/2001	Y	MA	Y	Y	N	N	🕒 🔍
JANE SIMPSON 15F DAU	03/2005	06/14/2005	Y	SI	N	Y	N		🕒 🔍
CATRINA SIMPSON 14F DAU	07/2001	07/25/2001	Y	SI	Y	Y	N	N	🕒 🔍

Individual	Begin Month	Updated on or before
ALL	MM / YYYY	MM / DD / YYYY Go

◀ Previous Next ▶



ACCESS – Background

- ❑ In January 2003, the USDA's Food and Nutrition Services (FNS) offered grants to organization aimed towards increasing the participation in the Food Stamp program.
- ❑ Deloitte Consulting helped WI DHFS with its grant proposal which described the creation of a web-based Customer Service Toolbox (now known as **ACCESS - Access to Eligibility Support Services for Health and Nutrition**).
- ❑ The key objectives for ACCESS client portal were to allow interested persons to screen themselves for eligibility, apply for benefits, check benefits, and report changes for Food Stamps and other programs.
- ❑ In June 2003, FNS awarded \$1.7M in grant to Wisconsin.



ACCESS – 4 Modules

- **Am I Eligible (Screener) – Phase 1 & 2 (Implemented August and December 2004)**
 - Several HHS and Social Services programs for various state departments including DHFS, DPI, and DOR (English and Spanish)
 - Medicare Part D (Implemented July 2005)
- **Check My Benefits (Implemented September 2005)**
 - Ability for clients to check their benefits online for FoodShare, Medicaid including Long-term care programs, Caretaker Supplement, and SeniorCare (Rx drug program)
- **Applying for Benefits (Implemented June 2006)**
 - Online application for FoodShare & Medicaid
 - CARES Worker Web (CWW) Inbox Functionality
- **Report My Changes (Implemented September 2006)**
 - Report changes for key demographic and financial information for the case/individuals





ACCESS

State of W I S C O N S I N

[Home](#) | [Am I Eligible?](#) | [Apply For Benefits](#) | [Check My Benefits](#) | [Report My Changes](#) | [About ACCESS](#)

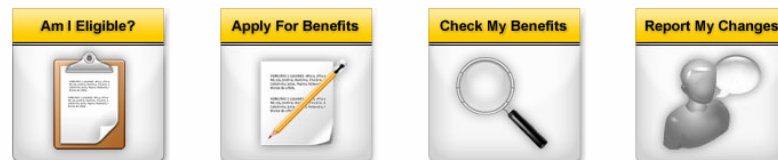
Tuesday July 17, 2007

Welcome to ACCESS!

ACCESS is a quick and easy way for people in Wisconsin to get answers to questions about health and nutrition programs. Please click on a picture below to choose the tool you would like to use.

To avoid errors when using ACCESS, please do not use the Forward, Back or Stop buttons on your browser. Instead, click on the ACCESS pictures and links to move from page to page.

Please keep in mind that this website works best with Internet Explorer. If you have trouble while using ACCESS, please call the Recipient Services hotline at 1-800-362-3002. For answers to common questions, [click here](#).



Click on the picture to see if you might be eligible for FoodShare, Medicaid, BadgerCare, SeniorCare, and other programs.

¿Reúno los requisitos?

Haga clic en el dibujo para ver si usted reúne los requisitos para recibir ayuda a través de los programas FoodShare, Medicaid, BadgerCare y SeniorCare entre otros.

Click on the picture to apply online for FoodShare and Medicaid (including BadgerCare and the Family Planning Waiver Program).

Click on the picture to check the status of your benefits.

Keep in mind that you'll only see information about your FoodShare, Medicaid, BadgerCare, SeniorCare and/or Caretaker Supplement benefits.

Click on the picture to report a change to your local agency.

[Legal Notices](#) | [Privacy Notice](#) | [Acceptable Use Policy](#)

Note: if you'd like to try out the online application without applying for benefits in Wisconsin, please use <http://trn.access.wisconsin.gov/access/>.





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