

**AGENT Reminders January 12, 2023**

**Child Care**

* Customers who call to apply for Child Care should not be transferred to leave a voicemail unless an RFA has been completed and an appointment has been scheduled. See process below:

*Open cases requesting childcare or a childcare only request:*

* *Create an RFA.*
* *Collect a telephonic signature.*
* *Complete the RFA and schedule an appointment with the Child Care Team from the County of Residence. Please schedule the appointment for 5 business days out to allow time for mailing. If the customer is on the phone with you and you are giving verbal notice of the appointment time, it is not required to schedule the appointment out 5 business days.*
* *If there are no appointments available within 5 business days, an email should be sent to the Child Care team letting them know that an appointment needs to be scheduled. If the client specifically requests an appointment outside of the 5 business days, please schedule the appointment and document this in case comments.*
* *If this is a Rock Child Care case, you can ask the client if they would like to be transferred to the Child Care line for an on-demand interview and advise that there may be a wait time.*
* *If a telephonic signature is declined, offer to mail the “Wisconsin Shares Child Care Registration” form or refer to ACCESS to apply.*
* *Document in case comments if the telephonic signature was refused and if form was mailed.*

*New request for childcare, no open case, and requesting multiple programs:*

* + *Create an RFA for all programs requested. Collect a telephonic signature.*
	+ *Complete the RFA and schedule an appointment with the Child Care Team from the County of Residence. Please schedule the appointment for 5 business days out to allow time for mailing. Document actions in case comments. If the customer is on the phone with you and you are giving verbal notice of the appointment time, it is not required to schedule the appointment out 5 business days.*
	+ *Process the request for any other programs except for Child Care. Pend for the Child Care interview.*
	+ *If this is a Rock Child Care case, you can ask the client if they would like to be transferred to the Child Care line for an on-demand interview and advise that there may be a wait time.*

**LTC/EBD**

* LTC Request Reminder:

All new requests, intakes, and asset assessments for LTC should be completed by the county of residence after following the below instructions.

* + Discuss options for setting a filing date with the caller. Advise the caller that LTC applications are processed by appointment through the local agencies. Stress the importance of setting a filing date.
	+ If the caller is applying on behalf of another individual, ask how the individual is related to the applicant. Document the relationship (Spouse, POA, Guardian, AR, etc.).
	+ Based on the individual applying, tell the caller that supporting documentation, such as POA, Auth Rep, or guardianship paperwork will be needed to complete the application process.
	+ Collect the signature from the caller.
	+ Schedule the appointment for a phone or FTF intake with the local office.
* NOTE: If the caller applying is reporting that they are acting on behalf of an incapacitated individual, we are still to collect the signature. Tell the caller we will need documentation of incapacitation.

Important Details:

* For cases that are open for other MA categories and are requesting LTC services, schedule an appointment with the county of residence. Do not create a new RFA.
* Collect any information, if available, related to admission date to the nursing home or hospital, hospitalization prior to nursing home stay, and what type of facility it is (nursing home, assisted living, CBRF, etc.)
* If the client is requesting Family Care or Iris and is not already working with the local ADRC, please refer them to the agency for assistance. We cannot process cases for Family Care/IRIS programs without the appropriate referral/functional screen on file for Community Waiver from the ADRC for new requests.
* When you get a call, always check the programs under query.  If they are not open for any Long-Term Care programs, any trained agent should be able to assist.  Do not transfer the case solely based on the name on the caseload or the LTC outside of CARES status.

**FoodShare**

* An application must not be denied prior to the 30th day, unless the interview has been completed, even if other information has been reported on the application that would make the FoodShare assistance group ineligible.  A workaround may be needed if the system is failing the case prior to an interview being completed.

**General**

* Below is some clarification on when a summary should be generated after an intake or renewal is processed.

**PH 1.6.1.8**

A Case Summary should only be generated at application and renewal or if a member calls and asks for a case summary to be generated; and only once the application and renewal process is completed. When processing an FFM application a case summary should always be mailed as the member doesn’t get Wisconsin’s Rights and Responsibilities though the FFM application. Processing a SMRF does not require that a case summary be mailed.

A case summary should **not** be generated while a case is pending for verification and is in intake or renewal status. Workers should make a case comment indicating that a case summary will need to be generated once verification items are received in their entirety and the case is no longer in intake or renewal status.

**Exceptions:** A case summary can be generated during intake or renewal if the case is only pending for a valid signature or if a telephonic signature is taken. When a telephonic signature is taken, an additional case summary does not need to be generated once verifications are received and processed, unless a significant change is reported.

Case summaries should always be generated for Childcare upon completion of the interview.

* Please pay attention to the due dates on the verification due dates page. There have been instances lately when an old date populates on the page and the FS and MA dates do not match. Example: new request for FS where the FS due date is out 30 days, but for some reason MA will not match up.  One case we had showed a due date of 01/04/23 for FS and MA was showing a due date of 10/21/22.
* There are updates to the C9 verification code in CARES:
	+ Effective 01/16/2023 the C9 code will no longer be enterable in CWW. If an applicant or member contacts the agency to report they are unable to obtain the verification requested due to a COVID-19- related reason the worker must assist in getting the verification(s). If verifications cannot be obtained, the worker should review and apply the existing best information available policy applicable per program.
	+ For cases that have pages with the C9 code currently entered, workers will be required to request verification of that item when the page is scheduled during a driver flow (new application, program add, person, add, change report, SMRF, renewal etc.). Workers must take action to update the verification code and request verification as needed. If the member does not provide requested verification for FoodShare or contact the agency to request assistance with verification, normal program rules will apply. If the member does not provide requested verification for health care, benefits will continue under the continuous coverage policy.
	+ For cases that have a C9 code entered on one or more of its pages, workers must update all C9 codes on the page to ?/Q? and request verification when the page is scheduled during a driver flow. Once verification is received workers should update the page and the verification code as appropriate or update to NV/QV if verification is not received.
	+ **Note -** Workers should not manually navigate to pages that are not a part of a driver flow and update the C9 code and/or request verification. If the C9 code is updated to another verification code in error, workers will not be able to revert it back to the C9 code. It is important that the C9 code is not updated unless the page is scheduled during a driver flow and an update to the C9 code is required.