

**AGENT Reminders July 27, 2023**

**EBD/LTC**

* When questioning asset pages, please follow the process for the AVS system in Process Help 50.1 and 50.4 .  You must enter the amount the individual reported on the page and ? the page first.  Once we receive the AVS alert, if there is no match, update the page to a Q? so notice is sent to the member.  If there is an AVS match and things are reasonably compatible with member reported information, the system will pass the case without verification.  It is appropriate to fail the eligibility based on member reported information if they are over assets at application or renewal per MEH 20.3.5.  We should not enter $1 on the page unless amounts are unknown, or you are conducting an asset assessment.
* When a person has an Irrevocable burial trust, these are funded by CDs.  Please enter each Irrevocable Burial Trust separately on the burial page.  The total of all of them will be combined by the system and the $4500 deducted.  It will count anything above the $4500 as an asset appropriately.   Enter the account number for each on the Burial page so when AVS matches come through, we can match the Burial asset with the CD from the bank.
* If someone reports a MAPP work activity, it must be verified as it is income relevant for program eligibility.  If they do not have a reported work activity, we would not request verification under the waiver until January 2024 eligibility determinations.  OM 23-08 states that work activity resumes for new applicants and members as of 1/1/24.
* Asset information is needed for the MSP (QMB, QMBN, SLMB, SLMB+ and QDWI) programs.  Benefits begin the first day of the month in which the date the program request or application is submitted and all eligibility requirements are met.  QMB and QMBN will begin the first of the month after the month in which the person is determined to be eligible.
* Fiscal Agent Verification Resources

**GT Independence**

Email: customerservice@gtsd.org

Fax: 888-972-3891

**iLife**

They have this form to fill out: <https://ilife.org/wp-content/uploads/PHW-Employment-Verification-Request-Form.pdf>

* email to verifications@iLIFE.org, or
* fax to 414-918-4463

**Outreach:** outreach.wi@acument2.net

**Premier:** IRIS@premier-fms.com

**General**

* When completing a person delete, check to see if they are on other cases that need to be updated.  This will prevent alerts and issues later when someone who has eligibility is 15’d out of the case due to the person delete.
* Even though calls are increasing, agents must still remember to follow the one-touch model. The One Touch philosophy of the Southern Consortium means that we process the case from beginning to end with the client on the phone.
* Local agency addresses should only be used when customers are homeless. Make sure that the current demographic page/s reflect that the customer is homeless. The agency address should be entered as the physical address for the customer and should never be entered as the mailing address.
* LIFT-    LIFT is a transportation service from Southwest Wisconsin Community Action (SWCAP) that serves Crawford, Grant, Green, Iowa, Lafayette and Richland Counties.   It provides rides for people that may have temporary or permanent difficulties with transportation.  To Schedule a ride, call 608-930-2191 Monday thru Friday.

LYFT-    LYFT (similar to UBER) is a ridesharing service that is popular in metropolitan areas, smaller towns are slowly catching on.  The driver will pick you up and take you where you want to go.  Lyft rides are scheduled per their app.

* When verification of in-kind income is requested, the Proof of In-Kind Hours form is not required to be returned. However, all of the information requested on the form must be included as part of the verification.
* When you re-pend a case the same day it’s confirmed open (for example, you confirm expedited FS open and then re-pend the case for future verification items), please run through to the end of the case.  If you do not, the system thinks it’s open and doesn’t set the 076 alert properly.
* PPRF's received with a signature, but without a check box marked are still valid. Best practice is that the worker make an attempt to contact the member by phone to confirm there are no changes. This attempt should be documented in case comments. If the member cannot be reached, the renewal should be processed as if no changes were reported.