

**AGENT Reminders September 14, 2023**

**General**

* **All** agents must go on phones and start taking calls at 3:45 each day unless they are in a customer interaction. This applies to agents not scheduled for phones at this time. This will help with clearing out the queue at the end of the day.
* If you are on SCC and a customer says that they want to go into the local office for assistance with something in person, an appointment should be scheduled for them. Please do not tell them to just show up at the local office as they may not be seen on-demand when they come in and could be told to come back later. Use the EO code when scheduling the appointment. If the appointment times available don’t work for someone, please email the county of residence.
* When you enter a QV on a case and cannot confirm a denial, it’s very important to run the case through to the confirmation page.  If you do not, the system sees the prior status and holds the prior due date.  When new action is taken, the old due date displays and a past due alert generates.
* Remember to review the Verificatoin Due Dates page and align any due dates. It causes untimely errors when old due dates display.  Remember to align program due dates so they match, to prevent errors in processing.
* Recently, there have been cases displaying a warning banner stating the case cannot be confirmed due to the PHE.  Please review the CEED on the case and the programs that are opening.  Sometimes, it is appropriate to confirm the denial.  Examples:  A Badger Care extension is opening and all members remain eligible.  We should confirm the changes to switch the categories.  Another example is the CEED is August.  We’re confirming denials for August benefits.  A warning banner might still display even though August benefits can be terminated.
* Expected changes are generated on a batch cycle.  If you set an expected change on a Friday for the following Monday, it will not generate.  These alerts also do not generate when set within the same week.  These alerts generate on Friday nights for due dates set for the following week Tuesday through the following Monday.  Any expected change set Monday to Thursday must be set for the following Monday or after.  Any expected change set on a Friday, must be set for the following Tuesday or after.  Otherwise, no alert generates and it later shows up as a past due alert.  Reference PH 43.1.4.  Example: Member calls Thursday.  Agent needs to set an expected change to send MA ID cards.  Agent sets the change for the following Tuesday.  Alert will run and generate.  Member calls Monday.  Agent needs to set an expected change to send MA ID cards.  Agent sets the change for Thursday the same week.  No alert generates until two weeks later when the batch cycle is run and it’s now past due.
* Please be mindful of long silences/long hold times when you are on the phone with a customer. If there are long silences because you are working on something or looking something up, let the customer know what you are doing and that you are still on the call. If you place the customer on hold, check in with the customer every three minutes.

**EBD/LTC**

* When an individual has a burial trust that puts them over the asset limit, please advise them to contact the bank holding the CDs first before talking to the funeral home.  When a funeral home must withdraw the funds themselves, they must give 30 days notice to the state and a client may not be able to get verification of the change in the asset for at least a month.  If the client requests withdrawal from the bank, the funeral home can approve that and the client can take the funds to them to make a change.
* If AVS shows accounts with a zero balance, reach out to the member to discuss if they still have the accounts. If the member states they are old, closed accounts, we can add the page and end it with a zero balance. Review for divestment for LTC programs. If you cannot reach the member, it's appropriate to pend the case and add text requesting they contact the SCC. We do not need to verify the closure on these accounts from old AVS matches that the client confirms closed.

**FoodShare**

* When a customer reports an address change, and needs to call Quest to have a replacement card issued, please remember to tell them that they need to wait until the next day to call to request the replacement card.

**HealthCare**

* No new signature or new application is required for individuals if they are calling to reopen the healthcare request within 30 days of the denial.  Reopen the request and pend for the missing verification.  Be sure they are given 30 days from the request.

If verification is not received within the 30 days of the original application and comes in within 30 days of the denial date, this is considered the individual re-requesting healthcare.  Open benefits or pend for the additional verification needed.  Be sure they are given 30 days from the request.

Reference BCPH 25.9.2 & MEH 2.9.2