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Date: April 6, 2017

DMS, DECE, and DFES Operations Memo 17-J4

To: Income Maintenance Supervisors  
Income Maintenance Lead Workers  
Income Maintenance Staff  
Workforce Development Boards  
W-2 Agencies  
Training Staff  
Child Care Coordinators

From: Rebecca McAtee, Bureau Director  
Bureau of Enrollment Policy and Systems  
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**Affected Programs:**

- BadgerCare Plus
- Caretaker Supplement
- Child Care
- Children First
- Emergency Assistance
- FoodShare
- FoodShare Employment and Training
- Job Access Loan
- Job Center Programs
- Medicaid
- Other Employment Programs
- Refugee Assistance Program
- SeniorCare
- Wisconsin Works
- Workforce Innovation and Opportunity Act

**Changes to Email Collection and Electronic Correspondence**

**CROSS REFERENCE**

- Operations Memo [14-J7](#)
- ACCESS Handbook, [Section 1.2 Create an Account](#)
- Process Help, [Section 58.1.3 Electronic Correspondence](#)

**EFFECTIVE DATE**

April 22, 2017

**PURPOSE**

This Operations Memo announces enhancements to CARES Worker Web (CWW) and ACCESS related to email address collection. With these enhancements, CWW and ACCESS will be able to:

- Collect email addresses at the individual level,
- Allow a primary person and a primary person's spouse on a case to receive case-based correspondence electronically,
- Allow individuals to receive their individual (or pin-based) correspondence electronically (this includes FoodShare Employment and Training (FSET) correspondence),
- Give individuals the option to share an email address with a health care partner.

Note: Electronic correspondence is also referred to as "paperless correspondence," "opting into paperless," or "getting letters online."

## **BACKGROUND**

On April 22, 2017, the Wisconsin Department of Health Services (DHS) and the Department of Children and Families (DCF) will be implementing new functionality in CARES Worker Web (CWW) and ACCESS for email addresses and electronic correspondence.

The email and electronic correspondence enhancements expand on the current process, which was implemented in December 2014 to meet requirements of the Affordable Care Act. At that time, DHS and DCF offered the primary person of a case a choice to view online PDF versions of their case-based and individual-level correspondence in ACCESS (provided the individual had or created a MyACCESS account).

Restrictions were placed on viewing privileges to prevent disclosure of personally identifiable information (PII) and protected health information (PHI). However, under certain situations, a primary person of a case was able to view individual-based correspondence for other individuals. As a result of the potential risk for sharing PII/PHI data, beginning December 2015, all non-Wisconsin Works (W-2) individual-level correspondence was removed from online viewing through ACCESS.

With the new functionality available April 22, 2017, the security risks will be resolved and individual-level correspondence will be available in ACCESS.

In addition:

- The primary person's email address will no longer be stored on the General Case Information page in CWW. Email addresses and email preferences for all individuals on a case will be stored on a new CWW page titled Electronic Contact Information.
- The "Manage My Letters" tab in ACCESS will be renamed to "Manage My Email" and allow all individuals with a MyACCESS account to change and update their email address and preferences.
- There will be a new question in ACCESS asking individuals who are applying for or renewing health care benefits if they would like their email address to be shared with health care partners, such as a health maintenance organization (HMO). Health care partners may use the individual's email address to send out information about health care services offered. Individuals with a MyACCESS account can change their choice at any time during their certification period.

## **POLICY**

### ***ELECTRONIC CORRESPONDENCE AND SECURITY***

Email addresses will no longer be collected at the case-level, but at an individual-level for each individual on a case. Any individual on a case who is 18 years or older can create a MyACCESS account and choose to receive electronic correspondence. Any individual who is younger than age 18 but is the primary person on their case can also create a MyACCESS account and choose to receive electronic correspondence.

The primary person on a case and the primary person's spouse will be able to view case-level correspondence in their MyACCESS account regardless of their electronic correspondence choice. This includes:

- The Enrollment and Benefits Handbook
- Notices of decision
- Case summaries
- Client scheduling intake and review appointments
- 45-day renewal letters

Letters such as the verification checklist, Six-Month Report forms, W-2 time limit notices, 45-day renewal reminders, or the Pre-Printed Renewal form will be displayed online but will also be sent by regular mail.

Individual electronic correspondence will only be viewed by an individual logged into his or her MyACCESS account. Examples of individual electronic correspondence include:

- FoodShare Employment and Training letters
- Wisconsin Works (W-2) appointment letters

Individuals will continue to receive a mailed letter with information about the electronic correspondence process in the following situations:

- When an individual chooses to receive electronic correspondence.
- When a change is made to the email address used for electronic correspondence.
- When an email notification was attempted and was undeliverable.
- When a case re-opens and has an email address on file for electronic correspondence.

These mailed letters have revised language and examples are included as Attachments [1](#), [2](#), [3](#), and [4](#).

### ***FOODSHARE EMPLOYMENT AND TRAINING LETTERS AND ONE-TIME MAILING FOR FSET PARTICIPANTS***

FoodShare Employment and Training letters were excluded after the original electronic correspondence release and were only available via regular mail. Beginning on April 22, 2017, FSET letters can be viewed by an FSET participant logged into their MyACCESS account. If an FSET participant has chosen to receive electronic correspondence, their FSET letters will only be available online. If a participant has not chosen to receive electronic correspondence, their FSET letters will be sent via regular mail.

In March 2017, a letter was mailed to all FSET participants who are the primary person on a case and receiving electronic correspondence. The letter notifies the participant that their FSET letters will now be online and not sent via regular mail unless they change their delivery choice. ([Attachment 5](#))

Information about electronic correspondence and how to get letters online has been added to the initial FSET enrollment appointment letter.

### ***SHARE EMAIL ADDRESS WITH HEALTH CARE PARTNERS***

To improve communication between health care partners (such as an HMO) and members, DHS will expand methods of communication with members to include email. HMOs are obligated to provide timely services to enrolled members and can find it difficult to contact enrolled members to provide services. In order to allow health care partners to communicate with members over email, members can choose to share their email address and receive information from health care partners via email.

A primary person who is 18 or older will be asked if they would like to share their email address with health care partners on behalf of themselves and any dependents who are 18 or younger when completing a health care application or renewal. Other adults in the household who are 19 years or older can add an email address and receive emails by creating a MyACCESS account. However, other adults in the household who are not the primary person, cannot share their email address on behalf of the spouse or dependent minors in the household, and can only share their own email address through a MyACCESS account.

If the member has shared their email address with health care partners, they may receive information about their health care services, such as:

- The HMO Member Handbook
- Health care renewal reminders from the HMO (Note: This is not the same as the 45-day renewal letter that is sent out from CWW)
- General health and wellness information

Health care partners are not allowed to send any protected health information (PHI) or personally identifiable information (PII) over email.

Note: Not all health care partners will use email to communicate with members. Even if the member chooses to share the email address with health partners, the member may still receive information from health care partners by regular mail or be contacted over the phone.

Individuals can choose to add or remove their email address, which is shared with health care partners, anytime during their health care certification period. The option to add or remove an email address will be available in the member's MyACCESS account. If no one on the case is eligible for health care benefits, this question will not be asked and email address will not be shared.

Note: If the member is making changes to the email address or choice, there will be a delay of 7-14 business days in sending the updated email address and preference to the health care partners due to batch processing.

## CARES

### ***ELECTRONIC CONTACT INFORMATION PAGE***

Effective April 22, 2017, the new Electronic Contact Information page in CWW will store email addresses, electronic correspondence choice, and choice to share email addresses with health care partners at the individual level. Any worker who currently has update access to the General Case Information page will also have access to update the Electronic Contact Information page. The Electronic Contact Information page will be scheduled after the General Case Information page during the following workflows and driver flows:

- Intake
- Renewal
- Program Add
- Person Add

The screenshot shows a web form titled "Electronic Contact Information". At the top right, there are "Cancel" and "Reset" buttons. The form is divided into sections: "Effective Period" with a "Delete Reason" dropdown and "Last Updated: 03/24/2017"; "Email Address" with a red asterisk indicating a required field, showing "Individual: IMA MEMBER 36F PP" and "Email Address: IMA MEMBER@EMAIL.COM"; and two questions with dropdown menus: "Get letters online with email notifications instead of by regular mail?" (Yes) and "Get emails from health care partners?" (No). At the bottom, there is a navigation bar with a dropdown for "Individual" (IMA MEMBER 36F PP), a date field "Updated on or before" (MM/DD/YYYY), and "Go" button. Below the navigation bar are "Add Case Comment", "Cancel", "Previous", and "Next" buttons.

**Figure 1** New Electronic Contact Information Page

### ***GET LETTERS ONLINE INSTEAD OF BY REGULAR MAIL?***

Only the primary person’s response is required for the “Get letters online instead of by regular mail?” question and is voluntary for all other adults on the case.

### ***GET EMAILS FROM HEALTH CARE PARTNERS?***

The “Get emails from health care partners?” optional question records the member’s choice to share email address with health care partners. Income Maintenance (IM) workers will not be required to ask the member about the option to share an email address with health care partners during intake, renewal, or review but must know where to update the information in CWW if asked. If a member contacts the IM agency and asks about sharing his or her email address with health care partners, please be aware of the following guidelines:

- Individuals can only choose to share an email address if they are 19 years of age or older. The only exception is a primary person who is 18 years old. Individuals who do not meet the age requirements will not be allowed to share an email address.
- An adult cannot share an email address on behalf of another adult on the case, even a spouse.
- Sharing an email address by the primary person will also apply to any dependent minors on the case, meaning that health care partners will be allowed to send email about dependent minors on the case to the primary person only. Email addresses are not collected separately for any dependent minors.

### **GENERAL CASE INFORMATION PAGE**

The email address field on the General Case Information page will no longer display the case email address field and “Get letters online instead of by regular mail?” question. Any existing information will be transferred to the Electronic Contact Information page and be considered the primary person’s email address and response.

Contact Information											
Work Phone:	123	456	7890	X	012345	Message Phone:	987	654	3210	X	012345
Cell Phone:	987	123	4567								
Preferred Contact Method:	HOME PHONE					Preferred Contact Time:	Early Morning				
Preferred Contact Method if Deaf or Hard of Hearing:											

Figure 2 Revised Contact Information Section of the General Case Information Page

### **FSET TOOL**

The Participant Summary page in the FSET Tool will list the individual FSET participant’s email address instead of the email address for the case. If an individual FSET participant provides their email address with their contact information, it will update the Participant Summary page and also match the entry on the new Electronic Contact Information page.

Figure 3 FSET Tool

**CASE SUMMARIES AND PRE-PRINTED RENEWAL FORMS (PPRFs)**

The case summaries and PPRFs will now include information about an individual’s email address, whether the individual has shared an email address with health care partners, and electronic correspondence choice. For privacy and security purposes, email addresses will be partially masked.

If changes to this information are returned on a paper case summary or PPRF, workers should enter the value provided on the document into CWW. This information does not require additional follow up.

<b>Email Information</b>			
<b>Person</b>	<b>Email Address</b>	<b>Get Email from Health Care Partners?</b>	<b>Get Letters Online?</b>
IMA	IXXXXXR@EMAIL.COM	No	Yes
JOE	JXXXXXR@EMAIL.COM		Yes
FRIENDOF	FXXXXXF@EMAIL.COM		Yes

Figure 4 Email Address Section of the Case Summary and PPRF

**ACCESS**

**GET LETTERS ONLINE INSTEAD OF BY REGULAR MAIL**

ACCESS will be enhanced to capture the electronic correspondence choice and email address of the primary person and primary person's spouse at the time of application, renewal, report change, add a program, and SMRF.

**Your Email Address**

Email Address :

Re-type Email Address :

You can get letters about your programs and benefits online.

If you choose to get letters online:

- You will get an email every time you have a new letter to view. You can then log in to your MyACCESS account to view your letter.
- You will not get copies of your letters in the regular mail. However, there are some letters that must always be sent by regular mail (for example, forms that you must fill out and send back to us).

Do you want to get letters about your benefits online instead of by regular mail?  Yes  No

Figure 5 Initial ACCESS Apply for Benefits Page

**More about Ima**

You do not have to provide a Social Security Number for this person if he/she is not asking for benefits.

Social Security Number:  -  -

If this person doesn't have a Social Security Number (SSN), but has applied for one, when did he or she apply?  Ex: mm/dd/yyyy

\* Is this person a resident of Wisconsin?  Yes  No

\* Does this person plan to stay as a resident of Wisconsin?  Yes  No

\* Is this person a U.S. citizen?  Yes  No

Email Address:

Re-type Email Address:

**Get Email from our Health Care Partners**

You can choose to get emails about your health services from our health care partners (for example, an HMO).

Only the primary person for a case may get information about health services for themselves and anyone in the home who is younger than age 19.

Other adults on a case who are older than age 18 will need to create their own MyACCESS account to choose to get emails about health services from our health care partners.

Do you want to get email from our health care partners?  Yes  No

**Get Letters Online**

You can get letters about your programs and benefits online.

If you choose to get letters online:

- You will get an email every time you have a new letter to view. You can then log in to your MyACCESS account to view your letter.
- You will not get copies of your letters in the regular mail. However, there are some letters that must always be sent by regular mail (for example, forms that you must fill out and send back to us).

Do you want to get letters about your benefits online instead of by regular mail?  Yes  No

Figure 6 ACCESS Household Members Detail Page

To inform individuals of the option for electronic correspondence, message banners will be displayed on the ACCESS home page and on the Check My Benefits landing page in MyACCESS. The banner on the ACCESS home page will be displayed for a short period of time to let ACCESS visitors know of the option to view letters online and will also include a link to the MyACCESS account creation page.

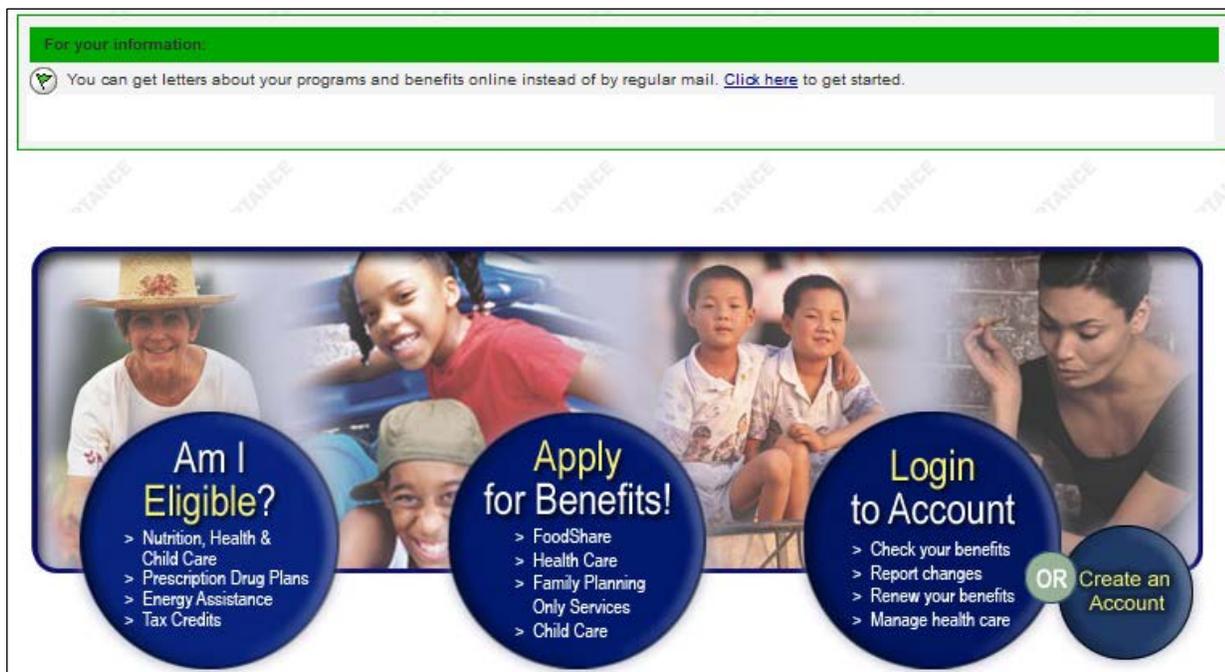


Figure 7 ACCESS Home Page Banner

The banner on the Check My Benefits landing page will appear for any individual who has a MyACCESS account and has not made an electronic correspondence choice. The message will no longer appear if the individual makes a choice (yes or no) for receiving letters online, or if the message is dismissed by the individual.



Figure 8 Check My Benefits Banner

### **GET EMAILS FROM HEALTH CARE PARTNERS**

The option to share an email address with health care partners will only be asked in ACCESS when there is a health care benefit request or if health care is open on an existing case. During application, only the primary person can choose to share his or her email address with health care partners. During renewal or when adding a program, the individual who is logged in to ACCESS may choose to share an email address for themselves only.

### **MANAGE MY EMAIL (FORMERLY MANAGE MY LETTERS)**

On the Manage My Email page (formerly titled Manage My Letters) anyone who has a MyACCESS account will have the ability to manage their email address and choose to get letters online instead of by regular mail. Individuals with health care open on their case will also be able to share their email address with health care partners on this page. To update information on the Manage My Email page, the individual's case must be currently open for benefits or have been closed less than 30 days.

MyACCESS View My Letters Manage My Email

**Manage My Email**

You can get letters about your programs and benefits online.

If you choose to get letters online:

- You will get an email when you have a new letter to view.
- You will not get copies of your letters in the regular mail. However, there are some letters that must always be sent by regular mail (for example, forms that you must fill out and send back to us).

**Case Number: 1150899115, Primary Person: IMA MEMBER**

Benefits/Programs: **FoodShare, BadgerCare Plus Standard Plan**

You can choose to get emails about your health services from our health care partners (for example, an HMO).

Note: Only the primary person for a case may get information about health services from our health care partners for themselves and anyone in the home who is younger than age 19. Other adults on the case will get information about health services for themselves.

Do you want to get email from our health care partners?  Yes  No

Do you want to get letters about your benefits online instead of by regular mail?  Yes  No

What is your email address?

Re-type email address:

Submit

Go to MyACCESS

Figure 9 Manage My Email Page

### ***INDIVIDUALS WHO ARE ON MORE THAN ONE CASE***

If an individual has a MyACCESS account and is part of more than one open (or closed less than 30 days) case, the individual will have the ability to request electronic correspondence for each case and provide the same or a different email address for each case.

**Example:** Joe is the primary person on his own health care case, but he is also open on another case for FoodShare. When Joe logs into his MyACCESS account, he will have the ability to enter No to receiving letters online for his health care case, and Yes to the FoodShare case and provide an email address for notification. He will not receive any notification through email of any new health care correspondence posted to his account. Alternatively, Joe could also answer Yes to the health care case and provide a different (or the same) email address for notification. If he provided a different email address than one he provided for his FoodShare case, he will receive notification of FoodShare correspondence through one email address and health care correspondence through the other email address.

## **INCOME MAINTENANCE MANAGEMENT REPORTS (IMMR):**

IMMR captures "Email" and "Paperless Correspondence Indicator" data at the case level and will be updated on April 22, 2017, to capture the data at the individual level. Any case-level electronic correspondence choice or email address will be converted into the primary person's individual-level choice and email address.

The following data points will be integrated into the IMMR Data Warehouse:

- Individual Email Address
- Individual Paperless Correspondence Indicator

The existing IMMR Ad hoc Universe will be enhanced to include the "Email" and "Paperless Correspondence Indicator" at the individual level.

The Active Case Details Report and the IM Recipient Detail Report in IMMR will be updated to reflect the change to an individual-level choice:

- Active Case Detail Report: The column title will be updated to reflect the primary person's email address and electronic correspondence choice.
  - "Email Address" changed to "Primary Person Email Address"
  - "Paperless Correspondence Indicator" changed to "Primary Person Paperless Correspondence Indicator"
- IM Recipient Detail Report and the Active Individual Detail Report. The following fields will be added:
  - "Individual Email Address"
  - "Paperless Correspondence Indicator"

## **ATTACHMENTS**

- [Attachment 1: Email Confirmation letter](#)
- [Attachment 2: Undelivered Email letter](#)
- [Attachment 3: Email Change letter](#)
- [Attachment 4: Case Reopening letter](#)
- [Attachment 5: FSET One-time letter](#)

## **CONTACTS**

BEPS CARES Information and Problem Resolution Center

For Child Care policy questions outside of Milwaukee County: Bureau of Regional Operations (BRO), Child Care Coordinators at <https://dcf.wisconsin.gov/files/regionaloperations/pdf/bro-contacts.pdf>

For Child Care CARES/CWW, CSAW, and CCPI IT systems processing questions statewide and policy questions in Milwaukee County: Child Care Help Desk at [childcare@wisconsin.gov](mailto:childcare@wisconsin.gov) or 608-264-1657

DHS/DMS/BEPS/ED

DCF/DECE/BOP/KP

DCF/DFES/BWF/JK