PA Minutes March 13, 2012

9:00 Check In
WDA 7: Facilitator
WDA 5: Notes

Individual Representative: This is still being reviewed and will go to SLT in the next few weeks.

Encryption: Denise Werner is working on this and it will be addressed during the next PA meeting

Resource Ownership: Allison & JoAnna
Draft Resource Ownership Guidance Piece created February 2012: The tone of first paragraph will be reviewed and updated to prevent discouraging using Resource Ownership (RO) and to generate creativity with its use. RO creates an opportunity that wouldn't have existed otherwise. The consumer is owner of equipment. Comparable benefits must be sought (IRIS, CC, FC, consumer, other) and cost sharing is an option. An employer buyout clause could be added to the agreement between the employer and employee. Directors could be trained on RO and encouraged to promote creative use of this option. Director approval is required when utilizing RO, but this may be eliminated after observing how it is being used. Delegated purchasing levels still apply. Directors may consult with Bureau Director or Policy Analyst for additional information and specific situations. A time frame for completing this process and additional examples may be added to the guidance. PA members will exchange emails to complete discussion and then it will be reviewed by SLT.

Online Application: Allison, Deb S, JoAnna
Highlights: Purpose of online application is another tool for consumers to access services to replace the rejection/mailing paper application we have been using. This is part of DWD strategic goal so as many resources possible are made available to increase access to consumers, improve accuracy, and reduce staff time. The paper application is still available. The application fields remain the same. Race and High School enrollment are being removed as required fields on the applications, but doing so will be required prior to completing eligibility, including presumptive eligibility. Only contact, disability, signature box are required elements, but applicants are being encouraged to complete the full online application. Although we will gather much information as we can, only the required items prevent the individual from completing an online application (red icon indicates required elements). As soon as submit button is hit, the 60 day clock starts. DVR will contact consumers when information is missing. There is concern that the computer decision " you may be eligible…" could mislead consumers.
The application is currently being tested by fiscal experts. Training will be discussed next week. There is language that guardian consent is still needed to ensure only the appropriate individuals are completing applications. PA members should email concerns, barriers, and suggestions related to having orientation for online applicants to Allison.

The next PA meeting will address how orientations can continue with the addition of the online application.

Deb shared WDA 3 recommended that a space be added on the current application for consumers to indicate if they are working with other agencies and who, such as a family care agency. This recommendation will be shared with Audrey.

Consumers with Personality Disorders Workgroup: Samina & Cecilia
Has been meeting since late June, 2011. Met with DOC recently to get feedback on best practices working with people with personality disorders. Best practices report was reviewed and discussed. It will be updated via email with the workgroup & then sent to SLT. PA members can email feedback to Samina & Cecilia over the next week.

Access to Consumer Health Records and Fees
Reviewed communication sent out by Kim Pomeroy on January 4, 2012. The law limiting payment for medical records to $25.00 was not passed. DVR pays customary and reasonable charges for records DVR requests. The 25% of the fees outlined in 146.83(3f) referenced in the email does not related to DVR. A DVR consumer may receive one copy of their record at no cost, Additional requests by the consumer for the full record are subject to the records fees as outlined in the *Records Notice* DVR-229-E.

Eligibility/OOS Waitlist Letter
Can this be updated? "Congratulations, you are eligible…" confuses consumers. It has been proposed that "congratulations" be removed and the category placement be provided immediately followed by the description v. the reverse which is the current format. The category placement will also be in bold to assist consumers with quickly finding this information. A statement of the wait time beginning at the time of application will be added to the letter.   An updated version of the letter for SSI/SSDI consumers will include the current EN letter, so that this will print out together as done with closure letters.

Self-Employment Review Process Recommendations: Linda V
Comments:
Toolkit

> Is it mandatory to seek out other funding prior to review?
> If consumer has plan for paying for unexpected expenses, should that be addressed during plan development?
> Is there a difference between self-employment and small business?
> Do small business plans need to be reviewed by external source?
> Is there a best practice or recommendations on how to define a successful point or mile stone when closing a case successfully?

Business consultants do poor feasibility studies or do not understand DVR process
Difficulty for counselors to determine feasibility
Toolkit too confusing for consumers, set up to say no rather than yes

Process should be streamlined
Confusing and overwhelming to use toolkit, staff need training and possibly mentoring
Recommendation for workshops for consumers after feasibility
Need adequate resources in each WDA
SBC get incomplete and poorly written plans
Have mentors to go through this process (former consumers) & maybe include former consumer on the SBC committee
SBCs across the state should use uniform feedback and reporting
Guidelines or a template to make sure that the plan is being properly reviewed
Satisfied with the process, resources are good, self-employment takes a little longer, but not as long as an education plan
Compare stats between self employment and employment
Feedback from self-employment consumers (successful and not)
Complete a profitability worksheet prior to feasibility to reduce time and costs if information shows that business isn't going to be profitable
DVR shouldn't be paying for small business based on Fed Regs, RSA, other source
Toolkit isn't laborious it is counselor's lack of experience with small business/the toolkit
There are not enough providers
Different providers provide different services and charge differently for the plan
Provide training, tech specs, and a fee schedule to providers
Our WDA is too generous
What is the success rate of the business
Feasibility shouldn't be purely research based
Counselor should to more upfront work with the feasibility, PASS, loans, etc before DVR invests in service providers.
DVR doesn't monitor the services provided by small business service providers
Need to provide debt and budget counseling
Uncomfortable with dual plan
Not enough resources for customized self-employment
Staff need training, we are counselors not small business planners
Inconsistencies from SBC regarding requirements, approval etc
Why do farmers with existing businesses get assistance without additional planning
Wisloan telework applications review for best practices (standard way to gauge approval of business plan)
Need to partner more with SBDC
Bring the BEST program back to save money
More information about access to grants and loans
We are trying to develop vendors
Poor quality services due to lack of knowledgeable vendors
Paying for what is requested is challenging. They ask for more things later. A standard amount of money for all would be best
Subjected process and relies on self-report
The same consultant should not be used to do feasibility study and business plan
SBC should rotate more often to develop expertise
Consumer is business owner but marital property law in Wisconsin
Consumers think that if they go through the process they will automatically get approved

All consumers should do a TE and/or job shadow prior to moving forward
Informational interviews to find out what is included in being a business owner
Give consumers toolkit in parts

See knowledge base for existing businesses and assistive technology
Send comments to policy analyst
Management will review some of these questions (fee schedules, etc)
Start-up toolkit training for all staff coming in near future
Majority of complaints through the Governor's office are about self-employment & SLT may want to have a workgroup look at this so we can respond on a state wide basis

Training Grants: Linda R
Changes in Financial Aid:
*FA should be completed as soon as possible to compete for more grants
State grants run out faster due to first come first serve basis
No Pell for summer
*Lifetime cap on 12 full-time semesters to receive Pell, no appeals, etc (cannot take classes that are part of program, change programs, etc or will run out of funding)
6 mo. grace period on student loans is being eliminated
Satisfactory academic process is required, check individual school
67% completion rate required related to 150% eligibility
July 1st, must have diploma, GED, etc to get grants and loans
If funding isn't available through FA, they will go through the same TG process as usual.

Customer Service Discussion: tabled

Business Services Team Update:
On Facebook. Share links, You Tube videos etc
JCOW site delayed. DVR may pay to help with funding to allow automatic uploads of resumes, flag if person might be eligible for tax credit, etc

Check out