

# ADULT FINANCIAL Q-FIT

## PUBLIC ASSISTANCE QUALITY ASSURANCE Q-FIT

### WHAT IS A Q-FIT?

A health tracker is a wearable device that monitors and reports activity to help people achieve their fitness goals. The device tracks distance, calories, duration, and intensity to provide an overview of the user's movement and is then used to improve their overall health.

The Public Assistance Quality Assurance (PAQA) team has collaborated with program areas to create an accuracy health tracker. The PAQA Q-Fit provides quarterly accuracy rates and the top three (3) contributing payment errors for each program. For each payment error, PAQA identifies what regulation requires and what QA reviews find. We then collaborate with the program representatives to provide guidance to resolve the issue based on current training and identify recommendations to monitor progress at the county level for the following programs:

1. Adult Financial
2. Child Care Assistance Program (CCCAP)
3. Colorado Works
4. Supplemental Nutrition Assistance Program (SNAP)
5. Low-income Energy Assistance Program (LEAP)

PAQA uses a 95/3 (for SNAP) or 95/5 sampling technique to gather QA data, meaning that if QA reviewed the entire population the results would be consistent with the findings of the PAQA review 95% of the time with a 3% to 5% margin of error. Therefore, even if the data does not include a case sampled from your county, we can be confident that the findings are consistent with what you would find in your broader caseload.

The PAQA Q-Fit utilizes data provided to you in the Monthly SNAP Report Card or EAQA Error Frequency Reports. These reports track case and payment data at the county and state levels cumulatively, beginning with each Federal Fiscal Year (FFY). They are located on the QAQI tab on the CDHS Portal.

The Q-Fit is located on the QAQI tab on the CDHS Portal and housed in the Public Assistance Quality Assurance (PAQA) link.

Please reference the Q-Fit Introduction sheet for more information regarding the purpose and use of the Q-Fit tool.

### Tracking State Level Data

#### Goal:

Case Accuracy Rate: >75%

Payment Accuracy Rate: >97%

#### Current Status:

##### Case Accuracy Rate

- FFY 14/15- 6.48% (final)
- FFY 15/16- 21.93% (through September 2016)

##### Statewide Payment Accuracy Rate

- FFY 14/15- 82.53% (final)
- FFY 15/16- 92.88% (through September 2016)

#### Top three (3) Contributing Payment Errors

- Interview- 68%
- In-kind Support and Maintenance- 10%
- Unearned Income- 8%
- Other- 14%



## ACTIVITY

Interviews are required at the initial application and every redetermination.

## WHAT IS REQUIRED

A face-to-face interview is required at the initial application unless good cause exists. If good cause exists, a telephone interview is required.

Statements made by the client on the application and during the interview are to be verified using the statewide-automated system's interfaces, documents, or collateral contact sources and documented in case comments.

The interview must include, among other items, an explanation of the various assistance programs available, an opportunity to apply for those additional programs, an explanation of the eligibility process and requirements, and a review of eligibility criteria and verification to support the information provided.

An interview is also required at each redetermination. This shall be conducted face-to-face if a face-to-face interview has not been conducted within three years of the RRR due date. If good cause exists to waive the face-to-face interview, documentation of good cause and a phone interview is still required.

## WHAT QA FINDS

- No redetermination interview is completed.
- Redeterminations are completed for Adult Financial, but the documentation of required interview (phone or face-to-face) does not show that eligibility criteria are being reviewed during the interview.
- Face-to-face interviews are waived with no documentation of good cause.

## HOW TO FIX IT

- Conduct face-to-face interviews with all Adult Financial applicants.
- Conduct either a phone or face-to-face interview at every Adult Financial RRR (NOTE: face-to-face must be conducted every 3 years).
- Document the determination of Adult Financial eligibility at all redeterminations.
- Document the contact and/or monitoring by Single Entry Point case managers and/or long-term care facility administration, if applicable, in order to waive the 3 year face-to-face requirement. An interview with the client or their designated representative is still required.
- Document and track the date of the face-to-face redetermination to ensure it is completed at least once every three years.
- As of December 2016, the CDHS interview page must be completed with each application and RRR. Please refer to the CBMS December 2016 Build Project Guide located at [TrainColorado.com](http://TrainColorado.com), Courses, CBMS Build Training.

## HOW COUNTIES CAN MONITOR THE FIX

- Are county findings consistent with EAQA findings? Where are the issues? Are interviews not conducted at all or do the cases lack the documentation to support the completion of an interview?
- Include a check for interview in initial applications and/or redetermination pre-authorizations.
- Does a review of case comments and/or documentation during a case file review elaborate on the completion of an interview? Do your county templates include opportunities for staff to highlight the interview as well as when a face-to-face occurred?



## ACTIVITY

In-kind Support and Maintenance (ISM) must be determined and calculated in certain circumstances based on the client's housing costs.

## WHAT IS REQUIRED

For certain clients who are not paying their fair share of housing costs, an In-kind Support and Maintenance (ISM) amount is determined and counted as unearned income. The ISM may be required when:

- The client's shelter costs are less than the current market value.
- The shelter costs are market value but the client is paying less than his/her fair share.
- The client is paying no shelter costs, and all shelter costs are supplied in full.
- The client receives SSI and is being charged an ISM by the Social Security Administration (SSA).

## WHAT QA FINDS

- Inconsistencies in applying the ISM rule. Some clients are charged an ISM when it is not required; others are not established for clients that meet the criteria above.
- ISM calculations are incorrect based on the housing costs and number of persons in the household.
- There is insufficient documentation to support the calculation of the ISM.
- Information provided to the SSA to establish the ISM is inconsistent with the information used to calculate the Adult Financial ISM.
- ISM calculations are not reviewed at redeterminations (in many instances, Food Assistance RRRs are combined with Adult Financial RRRs but do not include a review of fair share).

## HOW TO FIX IT

- Document why the ISM was (or was not) established.
- Request updates to housing and/or fair share information at initial application and redeterminations.
- Utilize the guidance provided in the March 17, 2016 "ISM" Thursday Think Tank presentation from EBD to calculate the ISM, determine fair share, determine the ISM amount, and accurately data enter ISM information in CBMS. Go to <https://my-cdhs.state.co.us/portal/group/EBD/Training> -then, click on Thursday Think Tanks, then, click on ISM.

## HOW COUNTIES CAN MONITOR THE FIX

- Identify the county specific findings for ISMs. Are they consistent with EAQA findings? Where are the issues? Does staff identify issues with when to establish an ISM, gathering verification to support the ISM, or is it due to the calculation of the ISM?
- Include a review of the ISM calculation at the initial applications and/or redetermination pre-authorizations.
- Check the ISM calculations when conducting case reviews. Are the calculations based on the most up-to-date policy guidance?



### ACTIVITY

Unearned income must be included in the eligibility determination.

### WHAT IS REQUIRED

Unearned income must be included in the determination of eligibility and benefit payment.

- Review case information and required household members (to include spouse and/or sponsor) to determine if a payment received in cash not considered earned through employment, such as pensions, public assistance, alimony and support, dividends, interests, prizes or inheritances, are included in the determination of eligibility and benefit.
- Include a review of unearned income at the initial interview and subsequent redeterminations.
- Data entry in CBMS is up-to-date and reflects the most current information in the case file.
- Any records of potential unearned income not considered verified upon receipt must have action taken by the agency to confirm the accuracy of the information.

### WHAT QA FINDS

- No case documentation exists to determine if a review of potential unearned income during the redetermination occurred.
- Not updating unearned income in CBMS timely resulting in overpayments.
- The disregard amount used to calculate the unemployment income is incorrect.
- Interfaced data is not updated and the case is not run in batch as part of mass update, causing incorrect unearned income records.
- Med B expenses are not included in the deeming calculation.

### HOW TO FIX IT

- Include a review of actual and potential unearned income at all initial application and redetermination interviews.
- Enter supporting documentation in CBMS Case Comments to identify any potential unearned income sources, the date the payments began, begin and end dates for each payment record, and payment amounts.
- Ensure timely action so benefits are accurate.
- Enter applicable spousal or sponsor income information in CBMS.
- “Work” exceptions to allow updated income amounts and new eligibility determinations as part of mass updates.
- Ensure the calculation of unearned income includes the correct disregard amounts and that applicable expenses are deemed.
- Reference the Expanding Foundations Adult Financial Income training, spouse income deeming worksheets and sponsor deeming worksheets available for end users located at [TrainColorado.com](http://TrainColorado.com) in the Documents Library under Adult Financial.
- Utilize the guidance provided in the October 77, 2016 Thursday Think Tank presentation on Potential Income from EBD. Go to <https://my-cdhs.state.co.us/portal/group/EBD/Training> -then, click on Thursday Think Tanks

### HOW COUNTIES CAN MONITOR THE FIX

- Include a review of the calculation method used to determine countable unearned income to ensure disregards and expenses are accurately calculated.