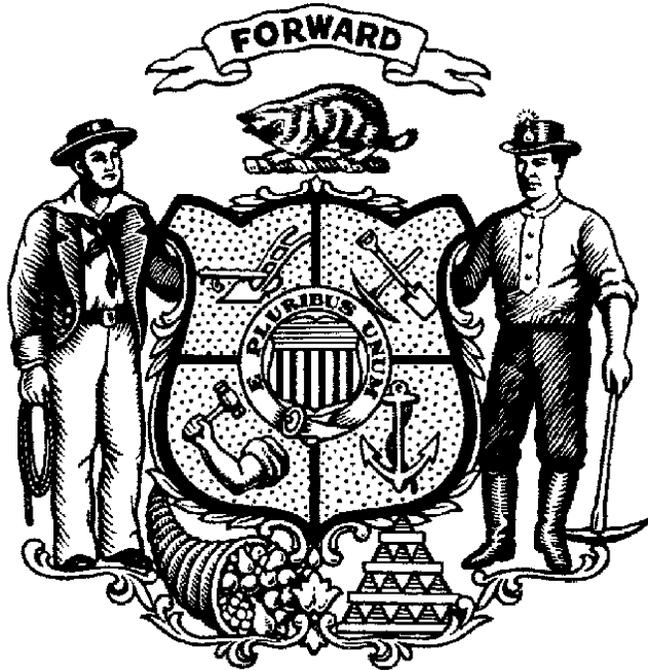


# State of Wisconsin

## Board on Aging and Long-Term Care



Agency Budget Request  
2013 – 2015 Biennium  
September 17, 2012

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STATE OF WISCONSIN  
BOARD ON AGING AND LONG TERM CARE

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Madison, WI 53704-4001  
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Ombudsman Program (800) 815-0015  
Medigap Helpline (800) 242-1060  
Part D Helpline (855) 677-2783  
Fax (608) 246-7001  
<http://longtermcare.wi.gov>

BOARD OF DIRECTORS  
Eva Arnold  
Barbara M. Bechtel  
Patricia A. Finder-Stone  
Terry Lynch  
Tanya L. Meyer  
James Surprise  
Dale B. Taylor  
  
EXECUTIVE DIRECTOR  
Heather A. Bruemmer

September 17, 2012

Brian Hayes, Budget Director  
Department of Administration  
101 E Wilson, 10<sup>th</sup> Floor  
Madison WI

Dear Mr. Hayes,

Please find enclosed the biennial budget proposal for FY 2013-2015 as developed by the Board on Aging and Long Term Care.

The Board has constructed a proposal that we believe addresses the needs of consumers of long-term care and Medicare beneficiaries in the state. We have made every effort to make the best use of program revenues whenever possible by utilizing those revenues efficiently and effectively to fund the Board's priorities without compromising transparency.

Our main priority in this budget proposal is to put into effect an improved, web-based database to supplant the current system in use by the Board on Aging and Long Term Care's Medigap Helpline. The Medigap Helpline has grown this past year since it has taken the Part D and Prescription Drug Helpline program and now needs a sustainable database upgrade to support the increased volume of program data.

The Board's other priorities include provision of direct advocacy services to an increasing number of Family Care clients and delivery of timely and accurate information and advice to purchasers of Medicare Advantage plans. Each of these agency responsibilities represents its own challenges.

Seven copies of the proposal are enclosed. Three copies will be forwarded to the Legislative Fiscal Bureau as well. The Board of Directors and I look forward to discussions in the coming weeks and months as the budget process unfolds.

Thank you very much.

Sincerely,

A handwritten signature in cursive script that reads "Heather A. Bruemmer".

Heather A. Bruemmer  
Executive Director

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*ADVOCATE FOR THE LONG TERM CARE CONSUMER*

## **AGENCY DESCRIPTION**

The Board was created by Chapter 20, Laws of 1981. The Board consists of seven citizen members who are appointed by the Governor with the advice and consent of the Senate to a fixed five-year term. In addition to the required annual reporting, the Board sends a comprehensive biennial report to the Governor and Legislature regarding the agency's activities relating to long-term care for the aging and disabled. The Board monitors federal, state and local laws and regulations that relate to the provision of long-term care services to the aging and disabled, and advocates for passage of legislative and administrative action to correct inadequacies in these laws. Through its Long Term Care Ombudsman Program, the Board investigates complaints relating to the care and treatment of aged and disabled persons receiving long-term care, and serves as mediator or advocate in efforts to resolve problems. Ombudsman program staff provide advice and assistance to persons seeking resolution of disputes involving the state's Family Care program up to and including assisting complainants in administrative hearings. The Volunteer Ombudsman Program recruits and trains volunteers to assist the regional Ombudsmen acting as advocates for long term care consumers in nursing homes. The Board also promotes public education to improve long-term care for the aged and disabled. Through the Medigap Helpline Program, the agency provides information and assistance to aging and disabled consumers regarding all forms of government-sponsored and private health insurance. The Helpline focuses on Medicare and related private insurance plans, primarily Medicare Supplemental policies, long term care insurance, and other health insurance options available to Medicare beneficiaries.

## **MISSION**

The mission of the Board on Aging and Long Term Care is to advocate for the interests of the state's aging and disabled populations, to inform consumers of their rights and to educate the public at large about health care systems and long term care.

The Board on Aging and Long Term Care consists of the Board of Directors and the Agency which is composed of an Executive Director and staff who operate the Long Term Care Ombudsman, Volunteer Ombudsman, and Medigap Helpline Programs.

In pursuit of this mission, the Board promotes a coordinated and comprehensive long-term care system. The Board serves the individual; monitors the development, implementation and outcome of long-term care policy; makes recommendations to the Governor, Legislature and the Wisconsin congressional delegation; stimulates public interest; and provides education regarding universal issues affecting long-term care.

The Wisconsin Board on Aging and Long Term Care subscribes to the values of: respect for the individual; protection of the right of the individual to be autonomous and free from threats to health, safety and quality of life; fairness in relationships with others; and clear and consistent communication with our clients. We respect our staff and volunteers and their ability to provide services consistent with the spirit and intent of these values.

The Board on Aging and Long Term Care is the premier resource for information and advocacy for our client population, and will continue as an integral part of the ever-changing system for long term care delivery in Wisconsin. The Board will increase its visibility by expanding its role and recognition as a leader and model of advocacy on the state and national stage.

## **PROGRAMS, GOALS, OBJECTIVES AND ACTIVITIES**

### **Program 1: Identification of the Needs of the Aged and Disabled**

**Goal:** To improve the quality of life for nursing home and assisted living facility residents and that of consumers of long term care funded by Family Care and the Community Options Program.

**Objective/Activity:** Consumers and their family members often report a fear of retaliation if they report problems or attempt to assert their rights. Ombudsman and Volunteer Ombudsman participation in resident councils is a proven tool for energizing, empowering and providing a sense of self-determination for residents. The Board intends to develop effective methods for enhancing Ombudsman and Volunteer Ombudsman participation in resident councils in a majority of the state's nursing homes.

The Board's Long Term Care Ombudsman Program intends to work diligently to encourage the development and effective operation of resident councils in assisted living facilities throughout the state.

**Objective/Activity:** Improve public education and outreach to consumers on issues and concerns about evaluating the appropriateness of, accessing, and assuring the quality of care and quality of life in long term care facilities in Wisconsin.

The Board intends to enhance the agency's public outreach efforts, including personal appearances by staff and improved usability of the agency's website to achieve the goal of providing accurate and useful information needed by aging and disabled citizens who are seeking long term care services.

**Goal:** Improve public education and outreach to consumers on issues related to Medicare Supplemental, Medicare Part D (Prescription drug), and related forms of insurance.

**Objective/Activity:** While the Board's Medigap Helpline has proven to be an extremely effective program to counsel individuals regarding their insurance needs and options, more needs to be done to reach a much larger audience of those who have significant needs but are unaware of the program's services and how to access them. The Board is continually redesigning its website to include timely information on insurance for older people and appropriate links to the websites of the Office of the Commissioner of Insurance and federal Centers for Medicare and Medicaid Services. Frequent and timely press releases containing pertinent information are being regularly sent out. Greater state-wide outreach in the form of in-person contacts with local groups of Medicare-eligible individuals is being used to advance this goal.

The Board intends to continue to enhance the agency's public outreach efforts, including personal appearances by staff and improved usability of the agency's website to achieve the goal of making the Medigap Helpline Program a resource that is recognized by the majority of Wisconsin seniors as the primary source of timely and accurate information about Medicare Supplemental, Part D, and related insurance products.

## PERFORMANCE MEASURES

### 2011 AND 2012 GOALS AND ACTUALS

| Prog. No. | Performance Measure  | Goal 2011 | Actual 2011 | Goal 2012 | Actual 2012 |
|-----------|--|-----------|-------------|-----------|-------------|
| 1.        | Number of Volunteer Ombudsman and Ombudsmen facility visits with resident councils. <sup>1</sup> | 250       | 303         | 350       | 388         |
| 1.        | Number of hits on the Board's website.   | 36,000    | 78,319      | 38,000    | 82,498      |

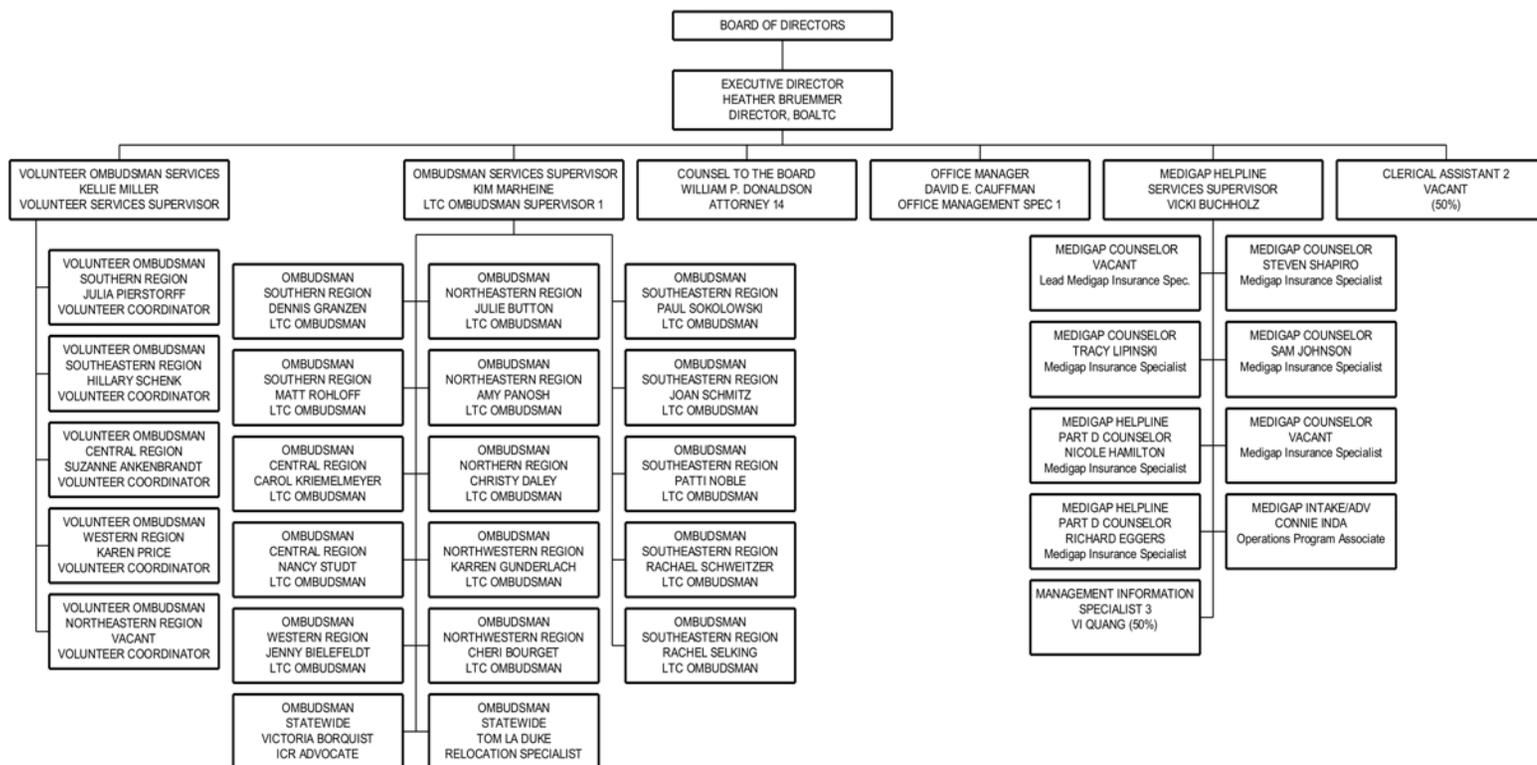
<sup>1</sup> Raw numbers shown here are equivalent to the percentages in the original goals.

### 2013, 2014 AND 2015 GOALS

| Prog. No. | Performance Measure  | Goal 2013 | Goal 2014 | Goal 2015 |
|-----------|--|-----------|-----------|-----------|
| 1.        | Ombudsmen and Volunteer Ombudsman visits to skilled nursing facility with resident councils. | 400       | 410       | 420       |
| 1.        | Number of outreach presentations by Ombudsman Program staff.                                 | 300       | 325       | 350       |
| 1.        | Number of outreach presentations by Medigap Program staff.                                   | 50        | 55        | 60        |
| 1.        | Number of hits on the Board's website.   | 84,000    | 86,000    | 90,000    |

STATE OF WISCONSIN  
 BOARD ON AGING AND LONG TERM CARE  
 ORGANIZATION CHART

September, 2012



# Agency Total by Fund Source

Board on Aging and Long-Term Care

1315 Biennial Budget

|                    |   | ANNUAL SUMMARY   |               |                |                |              |              | BIENNIAL SUMMARY        |                  |                   |                   |
|--------------------|---|------------------|---------------|----------------|----------------|--------------|--------------|-------------------------|------------------|-------------------|-------------------|
| Source of Funds    |   | Prior Year Total | Adjusted Base | 1st Year Total | 2nd Year Total | 1st Year FTE | 2nd Year FTE | Base Year Doubled (BYD) | Biennial Request | Change From (BYD) | Change From BYD % |
| GPR                | S | \$1,120,700      | \$1,077,200   | \$1,044,800    | \$1,044,800    | 14.73        | 14.73        | \$2,154,400             | \$2,089,600      | (\$64,800)        | -3.0%             |
| <b>Total</b>       |   | \$1,120,700      | \$1,077,200   | \$1,044,800    | \$1,044,800    | 14.73        | 14.73        | \$2,154,400             | \$2,089,600      | (\$64,800)        | -3.0%             |
| PR                 | S | \$1,417,007      | \$1,770,800   | \$1,790,200    | \$1,767,800    | 22.27        | 22.27        | \$3,541,600             | \$3,558,000      | \$16,400          | 0.5%              |
| <b>Total</b>       |   | \$1,417,007      | \$1,770,800   | \$1,790,200    | \$1,767,800    | 22.27        | 22.27        | \$3,541,600             | \$3,558,000      | \$16,400          | 0.5%              |
| <b>Grand Total</b> |   | \$2,537,707      | \$2,848,000   | \$2,835,000    | \$2,812,600    | 37.00        | 37.00        | \$5,696,000             | \$5,647,600      | (\$48,400)        | -0.8%             |

# Agency Total by Program

## Board on Aging and Long-Term Care

1315 Biennial Budget

| Source of Funds  | ANNUAL SUMMARY    |                    |                    |                    |              |              | BIENNIAL SUMMARY        |                    |                   |                   |
|--|-------------------|--------------------|--------------------|--------------------|--------------|--------------|-------------------------|--------------------|-------------------|-------------------|
|  | Prior Year Actual | Adjusted Base      | 1st Year Total     | 2nd Year Total     | 1st Year FTE | 2nd Year FTE | Base Year Doubled (BYD) | Biennial Request   | Change From (BYD) | Change From BYD % |
| <b>01 IDENTIFICATION OF THE NEEDS OF THE AGED AND DISABLED</b> |                   |                    |                    |                    |              |              |                         |                    |                   |                   |
| <b>Non Federal</b>   |                   |                    |                    |                    |              |              |                         |                    |                   |                   |
| GPR  | \$0               | \$1,077,200        | \$1,044,800        | \$1,044,800        | 14.73        | 14.73        | \$2,154,400             | \$2,089,600        | (\$64,800)        | -3.01%            |
| S  | \$0               | \$1,077,200        | \$1,044,800        | \$1,044,800        | 14.73        | 14.73        | \$2,154,400             | \$2,089,600        | (\$64,800)        | -3.01%            |
| PR   | \$0               | \$1,770,800        | \$1,790,200        | \$1,767,800        | 22.27        | 22.27        | \$3,541,600             | \$3,558,000        | \$16,400          | 0.46%             |
| S  | \$0               | \$1,770,800        | \$1,790,200        | \$1,767,800        | 22.27        | 22.27        | \$3,541,600             | \$3,558,000        | \$16,400          | 0.46%             |
| <b>Total - Non Federal</b>                                     | <b>\$0</b>        | <b>\$2,848,000</b> | <b>\$2,835,000</b> | <b>\$2,812,600</b> | <b>37.00</b> | <b>37.00</b> | <b>\$5,696,000</b>      | <b>\$5,647,600</b> | <b>(\$48,400)</b> | <b>-0.85%</b>     |
| S  | \$0               | \$2,848,000        | \$2,835,000        | \$2,812,600        | 37.00        | 37.00        | \$5,696,000             | \$5,647,600        | (\$48,400)        | -0.85%            |
| <b>PGM 01 Total</b>  | <b>\$0</b>        | <b>\$2,848,000</b> | <b>\$2,835,000</b> | <b>\$2,812,600</b> | <b>37.00</b> | <b>37.00</b> | <b>\$5,696,000</b>      | <b>\$5,647,600</b> | <b>(\$48,400)</b> | <b>-0.85%</b>     |
| GPR  | \$0               | \$1,077,200        | \$1,044,800        | \$1,044,800        | 14.73        | 14.73        | \$2,154,400             | \$2,089,600        | (\$64,800)        | -3.01%            |
| S  | \$0               | \$1,077,200        | \$1,044,800        | \$1,044,800        | 14.73        | 14.73        | \$2,154,400             | \$2,089,600        | (\$64,800)        | -3.01%            |
| PR   | \$0               | \$1,770,800        | \$1,790,200        | \$1,767,800        | 22.27        | 22.27        | \$3,541,600             | \$3,558,000        | \$16,400          | 0.46%             |
| S  | \$0               | \$1,770,800        | \$1,790,200        | \$1,767,800        | 22.27        | 22.27        | \$3,541,600             | \$3,558,000        | \$16,400          | 0.46%             |
| <b>TOTAL 01</b>  | <b>\$0</b>        | <b>\$2,848,000</b> | <b>\$2,835,000</b> | <b>\$2,812,600</b> | <b>37.00</b> | <b>37.00</b> | <b>\$5,696,000</b>      | <b>\$5,647,600</b> | <b>(\$48,400)</b> | <b>-0.85%</b>     |
| S  | \$0               | \$2,848,000        | \$2,835,000        | \$2,812,600        | 37.00        | 37.00        | \$5,696,000             | \$5,647,600        | (\$48,400)        | -0.85%            |
| <b>Agency Total</b>  | <b>\$0</b>        | <b>\$2,848,000</b> | <b>\$2,835,000</b> | <b>\$2,812,600</b> | <b>37.00</b> | <b>37.00</b> | <b>\$5,696,000</b>      | <b>\$5,647,600</b> | <b>(\$48,400)</b> | <b>-0.85%</b>     |

# Agency Total by Decision Item

## Board on Aging and Long-Term Care

1315 Biennial Budget

| Decision Item   | 1st Year Total     | 2nd Year Total     | 1st Year FTE | 2nd Year FTE |
|---|--------------------|--------------------|--------------|--------------|
| 2000 Adjusted Base Funding Level                                      | \$2,848,000        | \$2,848,000        | 37.00        | 37.00        |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | (\$35,400)         | (\$35,400)         | 0.00         | 0.00         |
| 3005 Reclassifications and Semiautomatic Pay Progression              | \$4,700            | \$4,700            | 0.00         | 0.00         |
| 3010 Full Funding of Lease and Directed Moves Costs                   | (\$8,100)          | (\$6,500)          | 0.00         | 0.00         |
| 3500 Permanent GPR Reductions   | (\$11,300)         | (\$11,300)         | 0.00         | 0.00         |
| 5100 Medigap Helpline Database Upgrade                                | \$37,100           | \$13,100           | 0.00         | 0.00         |
| <b>TOTAL</b>  | <b>\$2,835,000</b> | <b>\$2,812,600</b> | <b>37.00</b> | <b>37.00</b> |

# GPR Earned

1315 Biennial Budget

|                   | <b>CODES</b>       | <b>TITLES</b>  |
|-------------------|--------------------|--|
| <b>DEPARTMENT</b> | 432                | Board on Aging and Long-Term Care                    |
| <b>PROGRAM</b>    | 01                 | Identification of the needs of the aged and disabled |
| <b>DATE</b>       | September 17, 2012 |  |

| <b>Revenue</b>             | <b>Prior Year Actuals</b> | <b>Base Year Estimate</b> | <b>1st Year Estimate</b> | <b>2nd Year Estimate</b> |
|----------------------------|---------------------------|---------------------------|--------------------------|--------------------------|
| Opening Balance            | \$0                       | \$0                       | \$0                      | \$0                      |
| Lapses to the General Fund | \$130,000                 | \$130,000                 | \$118,700                | \$118,700                |
| <b>Total</b>               | <b>\$130,000</b>          | <b>\$130,000</b>          | <b>\$118,700</b>         | <b>\$118,700</b>         |

# Program Revenue

1315 Biennial Budget

|                       | CODES | TITLES   |
|-----------------------|-------|--|
| DEPARTMENT            | 432   | Board on Aging and Long-Term Care                    |
| PROGRAM               | 01    | Identification of the needs of the aged and disabled |
| SUBPROGRAM            |       |  |
| NUMERIC APPROPRIATION | 31    | Contracts with other state agencies                  |

| Revenue and Expenditures  | Prior Year Actuals | Base Year Estimate | 1st Year Estimate  | 2nd Year Estimate  |
|---|--------------------|--------------------|--------------------|--------------------|
| <b>Opening Balance</b>  | <b>(\$302,800)</b> | <b>(\$294,000)</b> | <b>\$0</b>         | <b>\$0</b>         |
| Program Revenue   | \$1,026,200        | \$1,397,000        | \$1,327,000        | \$1,357,800        |
| <b>Total Revenue</b>  | <b>\$723,400</b>   | <b>\$1,103,000</b> | <b>\$1,327,000</b> | <b>\$1,357,800</b> |
| <b>Expenditures</b>   | <b>\$1,017,400</b> | <b>\$1,103,000</b> | <b>\$0</b>         | <b>\$0</b>         |
| Compensation Reserve  | \$0                | \$0                | \$17,200           | \$34,700           |
| Health Insurance Reserves   | \$0                | \$0                | \$12,300           | \$23,900           |
| Wisconsin Retirement System   | \$0                | \$0                | \$100              | \$200              |
| 3010 Full Funding of Lease and Directed Moves Costs                   | \$0                | \$0                | (\$8,100)          | (\$6,500)          |
| 2000 Adjusted Base Funding Level                                      | \$0                | \$0                | \$1,297,200        | \$1,297,200        |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | \$0                | \$0                | \$6,400            | \$6,400            |
| 3005 Reclassifications and Semiautomatic Pay Progression              | \$0                | \$0                | \$1,900            | \$1,900            |
| <b>Total Expenditures</b>   | <b>\$1,017,400</b> | <b>\$1,103,000</b> | <b>\$1,327,000</b> | <b>\$1,357,800</b> |
| <b>Closing Balance</b>  | <b>(\$294,000)</b> | <b>\$0</b>         | <b>\$0</b>         | <b>\$0</b>         |

# Program Revenue

1315 Biennial Budget

|                       | CODES | TITLES   |
|-----------------------|-------|--|
| DEPARTMENT            | 432   | Board on Aging and Long-Term Care                          |
| PROGRAM               | 01    | Identification of the needs of the aged and disabled       |
| SUBPROGRAM            |       |  |
| NUMERIC APPROPRIATION | 32    | Insurance and other information, counseling and assistance |

| Revenue and Expenditures  | Prior Year Actuals | Base Year Estimate | 1st Year Estimate | 2nd Year Estimate |
|---|--------------------|--------------------|-------------------|-------------------|
| Opening Balance   | \$19,200           | \$5,300            | \$0               | \$0               |
|   | \$385,700          | \$468,300          | \$624,000         | \$612,500         |
| <b>Total Revenue</b>  | <b>\$404,900</b>   | <b>\$473,600</b>   | <b>\$624,000</b>  | <b>\$612,500</b>  |
| <b>Expenditures</b>   | <b>\$399,600</b>   | <b>\$473,600</b>   | <b>\$0</b>        | <b>\$0</b>        |
| 3003 Full Funding of Continuing Position Salaries and Fringe Benefits | \$0                | \$0                | (\$17,900)        | (\$17,900)        |
| 5100 Medigap Helpline Database Upgrade                                | \$0                | \$0                | \$37,100          | \$13,100          |
| 2000 Adjusted Base Funding Level                                      | \$0                | \$0                | \$473,600         | \$473,600         |
| Compensation Reserve  | \$0                | \$0                | \$5,700           | \$11,600          |
| Health Insurance Reserves   | \$0                | \$0                | \$6,800           | \$13,300          |
| PR Cash Lapse   | \$0                | \$0                | \$118,700         | \$118,700         |
| Wisconsin Retirement System   | \$0                | \$0                | \$0               | \$100             |
| <b>Total Expenditures</b>   | <b>\$399,600</b>   | <b>\$473,600</b>   | <b>\$624,000</b>  | <b>\$612,500</b>  |
| <u>Closing Balance</u>  | <u>\$5,300</u>     | <u>\$0</u>         | <u>\$0</u>        | <u>\$0</u>        |

**Decision Item (DIN) - 2000**  
**Adjusted Base Funding Level**

**NARRATIVE**

Adjusted Base Funding Level

**Decision Item by Line**

**1315 Biennial Budget**

|                      |              |                                   |
|----------------------|--------------|-----------------------------------|
|                      | <b>CODES</b> | <b>TITLES</b>                     |
| <b>DEPARTMENT</b>    | 432          | Board on Aging and Long-Term Care |
|                      | <b>CODES</b> | <b>TITLES</b>                     |
| <b>DECISION ITEM</b> | 2000         | Adjusted Base Funding Level       |

| <b>Expenditure items</b> |                                   | <b>1st Year Cost</b> | <b>2nd Year Cost</b> |
|--------------------------|-----------------------------------|----------------------|----------------------|
| 01                       | Permanent Position Salaries       | \$1,663,500          | \$1,663,500          |
| 02                       | Turnover                          | \$0                  | \$0                  |
| 03                       | Project Position Salaries         | \$0                  | \$0                  |
| 04                       | LTE/Misc. Salaries                | \$0                  | \$0                  |
| 05                       | Fringe Benefits                   | \$788,200            | \$788,200            |
| 06                       | Supplies and Services             | \$396,300            | \$396,300            |
| 07                       | Permanent Property                | \$0                  | \$0                  |
| 08                       | Unallotted Reserve                | \$0                  | \$0                  |
| 09                       | Aids to Individuals Organizations | \$0                  | \$0                  |
| 10                       | Local Assistance                  | \$0                  | \$0                  |
| 11                       | One-time Financing                | \$0                  | \$0                  |
| 12                       | Debt Service                      | \$0                  | \$0                  |
| 13                       |                                   | \$0                  | \$0                  |
| 14                       |                                   | \$0                  | \$0                  |
| 15                       |                                   | \$0                  | \$0                  |
| 16                       |                                   | \$0                  | \$0                  |
| <b>17</b>                | <b>Total Cost</b>                 | <b>\$2,848,000</b>   | <b>\$2,848,000</b>   |
| 18                       | Project Positions Authorized      | 0.00                 | 0.00                 |
| 19                       | Classified Positions Authorized   | 37.00                | 37.00                |
| 20                       | Unclassified Positions Authorized | 0.00                 | 0.00                 |

**Decision Item by Numeric**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

| <b>Program</b> | <b>Decision Item/Numeric</b>   | <b>1st Year Total</b>              | <b>2nd Year Total</b> | <b>1st Year FTE</b> | <b>2nd Year FTE</b> |
|----------------|--|------------------------------------|-----------------------|---------------------|---------------------|
|                | <b>2000</b>  | <b>Adjusted Base Funding Level</b> |                       |                     |                     |
| <b>01</b>      | <b>Identification of the needs of the aged and disabled</b>          |                                    |                       |                     |                     |
|                | 01 General program operations  | \$1,077,200                        | \$1,077,200           | 14.73               | 14.73               |
|                | 31 Contracts with other state agencies                               | \$1,297,200                        | \$1,297,200           | 16.29               | 16.29               |
|                | 32 Insurance and other information, counseling and assistance        | \$473,600                          | \$473,600             | 5.98                | 5.98                |
|                | <b>Identification of the needs of the aged and disabled SubTotal</b> | <b>\$2,848,000</b>                 | <b>\$2,848,000</b>    | <b>37.00</b>        | <b>37.00</b>        |
|                | <b>Adjusted Base Funding Level SubTotal</b>                          | <b>\$2,848,000</b>                 | <b>\$2,848,000</b>    | <b>37.00</b>        | <b>37.00</b>        |
|                |  |                                    |                       |                     |                     |
|                | <b>Agency Total</b>  | <b>\$2,848,000</b>                 | <b>\$2,848,000</b>    | <b>37.00</b>        | <b>37.00</b>        |

**Decision Item by Fund Source**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

|                      | Source of Funds |                                    |                    | 1st Year Total     | 2nd Year Total | 1st Year FTE | 2nd Year FTE |
|----------------------|-----------------|------------------------------------|--------------------|--------------------|----------------|--------------|--------------|
| <b>Decision Item</b> | <b>2000</b>     | <b>Adjusted Base Funding Level</b> |                    |                    |                |              |              |
|                      | GPR             | S                                  | \$1,077,200        | \$1,077,200        | 14.73          | 14.73        |              |
|                      | PR              | S                                  | \$1,770,800        | \$1,770,800        | 22.27          | 22.27        |              |
|                      | <b>Total</b>    |                                    | <b>\$2,848,000</b> | <b>\$2,848,000</b> | <b>37.00</b>   | <b>37.00</b> |              |
| <b>Agency Total</b>  |                 |                                    | <b>\$2,848,000</b> | <b>\$2,848,000</b> | <b>37.00</b>   | <b>37.00</b> |              |

**Decision Item (DIN) - 3003**

**Full Funding of Continuing Position Salaries and Fringe Benefits**

**NARRATIVE**

Standard Budget Adjustment - Full Funding of Continuing Position Salaries and Fringe Benefits

**Decision Item by Line**

**1315 Biennial Budget**

|                      |              |  |
|----------------------|--------------|--|
|                      | <b>CODES</b> | <b>TITLES</b>  |
| <b>DEPARTMENT</b>    | 432          | Board on Aging and Long-Term Care                                |
|                      | <b>CODES</b> | <b>TITLES</b>  |
| <b>DECISION ITEM</b> | 3003         | Full Funding of Continuing Position Salaries and Fringe Benefits |

|           | <b>Expenditure items</b>          | <b>1st Year Cost</b> | <b>2nd Year Cost</b> |
|-----------|-----------------------------------|----------------------|----------------------|
| 01        | Permanent Position Salaries       | (\$55,200)           | (\$55,200)           |
| 02        | Turnover                          | \$0                  | \$0                  |
| 03        | Project Position Salaries         | \$0                  | \$0                  |
| 04        | LTE/Misc. Salaries                | \$0                  | \$0                  |
| 05        | Fringe Benefits                   | \$19,800             | \$19,800             |
| 06        | Supplies and Services             | \$0                  | \$0                  |
| 07        | Permanent Property                | \$0                  | \$0                  |
| 08        | Unalloted Reserve                 | \$0                  | \$0                  |
| 09        | Aids to Individuals Organizations | \$0                  | \$0                  |
| 10        | Local Assistance                  | \$0                  | \$0                  |
| 11        | One-time Financing                | \$0                  | \$0                  |
| 12        | Debt Service                      | \$0                  | \$0                  |
| 13        |                                   | \$0                  | \$0                  |
| 14        |                                   | \$0                  | \$0                  |
| 15        |                                   | \$0                  | \$0                  |
| 16        |                                   | \$0                  | \$0                  |
| <b>17</b> | <b>Total Cost</b>                 | <b>(\$35,400)</b>    | <b>(\$35,400)</b>    |
| 18        | Project Positions Authorized      | 0.00                 | 0.00                 |
| 19        | Classified Positions Authorized   | 0.00                 | 0.00                 |
| 20        | Unclassified Positions Authorized | 0.00                 | 0.00                 |

**Decision Item by Numeric**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

| <b>Program</b> | <b>Decision Item/Numeric</b>   | <b>1st Year Total</b>   | <b>2nd Year Total</b> | <b>1st Year FTE</b> | <b>2nd Year FTE</b> |
|----------------|--|---|-----------------------|---------------------|---------------------|
|                | <b>3003</b>  | <b>Full Funding of Continuing Position Salaries and Fringe Benefits</b> |                       |                     |                     |
| <b>01</b>      | <b>Identification of the needs of the aged and disabled</b>                      |   |                       |                     |                     |
|                | 01 General program operations  | (\$23,900)  | (\$23,900)            | 0.00                | 0.00                |
|                | 31 Contracts with other state agencies   | \$6,400   | \$6,400               | 0.00                | 0.00                |
|                | 32 Insurance and other information, counseling and assistance                    | (\$17,900)  | (\$17,900)            | 0.00                | 0.00                |
|                | <b>Identification of the needs of the aged and disabled SubTotal</b>             | <b>(\$35,400)</b>   | <b>(\$35,400)</b>     | <b>0.00</b>         | <b>0.00</b>         |
|                | <b>Full Funding of Continuing Position Salaries and Fringe Benefits SubTotal</b> | <b>(\$35,400)</b>   | <b>(\$35,400)</b>     | <b>0.00</b>         | <b>0.00</b>         |
|                |  |   |                       |                     |                     |
|                | <b>Agency Total</b>  | <b>(\$35,400)</b>   | <b>(\$35,400)</b>     | <b>0.00</b>         | <b>0.00</b>         |

**Decision Item by Fund Source**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

|                      |                 |   |                   | 1st Year FTE      | 2nd Year FTE |
|----------------------|-----------------|---|-------------------|-------------------|--------------|
|                      | Source of Funds |   | 1st Year Total    | 2nd Year Total    |              |
| <b>Decision Item</b> | <b>3003</b>     | <b>Full Funding of Continuing Position Salaries and Fringe Benefits</b> |                   |                   |              |
|                      | GPR             | S   | (\$23,900)        | (\$23,900)        | 0.00         |
|                      | PR              | S   | (\$11,500)        | (\$11,500)        | 0.00         |
|                      | <b>Total</b>    |   | <b>(\$35,400)</b> | <b>(\$35,400)</b> | <b>0.00</b>  |
| <b>Agency Total</b>  |                 |   | <b>(\$35,400)</b> | <b>(\$35,400)</b> | <b>0.00</b>  |

**Decision Item (DIN) - 3005**  
**Reclassifications and Semiautomatic Pay Progression**

**NARRATIVE**

Standard Budget Adjustment - Reclassifications and Semiautomatic Pay Progression

**Decision Item by Line**

**1315 Biennial Budget**

|                      |              |   |
|----------------------|--------------|---|
|                      | <b>CODES</b> | <b>TITLES</b>                                       |
| <b>DEPARTMENT</b>    | 432          | Board on Aging and Long-Term Care                   |
|                      | <b>CODES</b> | <b>TITLES</b>                                       |
| <b>DECISION ITEM</b> | 3005         | Reclassifications and Semiautomatic Pay Progression |

|           | <b>Expenditure items</b>          | <b>1st Year Cost</b> | <b>2nd Year Cost</b> |
|-----------|-----------------------------------|----------------------|----------------------|
| 01        | Permanent Position Salaries       | \$4,000              | \$4,000              |
| 02        | Turnover                          | \$0                  | \$0                  |
| 03        | Project Position Salaries         | \$0                  | \$0                  |
| 04        | LTE/Misc. Salaries                | \$0                  | \$0                  |
| 05        | Fringe Benefits                   | \$700                | \$700                |
| 06        | Supplies and Services             | \$0                  | \$0                  |
| 07        | Permanent Property                | \$0                  | \$0                  |
| 08        | Unalloted Reserve                 | \$0                  | \$0                  |
| 09        | Aids to Individuals Organizations | \$0                  | \$0                  |
| 10        | Local Assistance                  | \$0                  | \$0                  |
| 11        | One-time Financing                | \$0                  | \$0                  |
| 12        | Debt Service                      | \$0                  | \$0                  |
| 13        |                                   | \$0                  | \$0                  |
| 14        |                                   | \$0                  | \$0                  |
| 15        |                                   | \$0                  | \$0                  |
| 16        |                                   | \$0                  | \$0                  |
| <b>17</b> | <b>Total Cost</b>                 | <b>\$4,700</b>       | <b>\$4,700</b>       |
| 18        | Project Positions Authorized      | 0.00                 | 0.00                 |
| 19        | Classified Positions Authorized   | 0.00                 | 0.00                 |
| 20        | Unclassified Positions Authorized | 0.00                 | 0.00                 |

**Decision Item by Numeric**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

| <b>Program</b> | <b>Decision Item/Numeric</b>   | <b>1st Year Total</b>                                      | <b>2nd Year Total</b> | <b>1st Year FTE</b> | <b>2nd Year FTE</b> |
|----------------|--|--|-----------------------|---------------------|---------------------|
|                | <b>3005</b>  | <b>Reclassifications and Semiautomatic Pay Progression</b> |                       |                     |                     |
| <b>01</b>      | <b>Identification of the needs of the aged and disabled</b>          |  |                       |                     |                     |
|                | 01 General program operations  | \$2,800  | \$2,800               | 0.00                | 0.00                |
|                | 31 Contracts with other state agencies                               | \$1,900  | \$1,900               | 0.00                | 0.00                |
|                | <b>Identification of the needs of the aged and disabled SubTotal</b> | <b>\$4,700</b>   | <b>\$4,700</b>        | <b>0.00</b>         | <b>0.00</b>         |
|                | <b>Reclassifications and Semiautomatic Pay Progression SubTotal</b>  | <b>\$4,700</b>   | <b>\$4,700</b>        | <b>0.00</b>         | <b>0.00</b>         |
|                |  |  |                       |                     |                     |
|                | <b>Agency Total</b>  | <b>\$4,700</b>   | <b>\$4,700</b>        | <b>0.00</b>         | <b>0.00</b>         |

**Decision Item by Fund Source**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

|                      |                 |  |                | 1st Year FTE   | 2nd Year FTE |
|----------------------|-----------------|--|----------------|----------------|--------------|
|                      | Source of Funds |  | 1st Year Total | 2nd Year Total |              |
| <b>Decision Item</b> | <b>3005</b>     | <b>Reclassifications and Semiautomatic Pay Progression</b> |                |                |              |
|                      | GPR             | S  | \$2,800        | \$2,800        | 0.00         |
|                      | PR              | S  | \$1,900        | \$1,900        | 0.00         |
|                      | <b>Total</b>    |  | <b>\$4,700</b> | <b>\$4,700</b> | <b>0.00</b>  |
| <b>Agency Total</b>  |                 |  | <b>\$4,700</b> | <b>\$4,700</b> | <b>0.00</b>  |

**Decision Item (DIN) - 3010**  
**Full Funding of Lease and Directed Moves Costs**

**NARRATIVE**

Standard Budget Adjustment - Full Funding of Lease and Directed Moves Costs

**Decision Item by Line**

**1315 Biennial Budget**

|                      |              |  |
|----------------------|--------------|--|
|                      | <b>CODES</b> | <b>TITLES</b>                                  |
| <b>DEPARTMENT</b>    | 432          | Board on Aging and Long-Term Care              |
|                      | <b>CODES</b> | <b>TITLES</b>                                  |
| <b>DECISION ITEM</b> | 3010         | Full Funding of Lease and Directed Moves Costs |

| <b>Expenditure items</b> |                                   | <b>1st Year Cost</b> | <b>2nd Year Cost</b> |
|--------------------------|-----------------------------------|----------------------|----------------------|
| 01                       | Permanent Position Salaries       | \$0                  | \$0                  |
| 02                       | Turnover                          | \$0                  | \$0                  |
| 03                       | Project Position Salaries         | \$0                  | \$0                  |
| 04                       | LTE/Misc. Salaries                | \$0                  | \$0                  |
| 05                       | Fringe Benefits                   | \$0                  | \$0                  |
| 06                       | Supplies and Services             | (\$8,100)            | (\$6,500)            |
| 07                       | Permanent Property                | \$0                  | \$0                  |
| 08                       | Unalloted Reserve                 | \$0                  | \$0                  |
| 09                       | Aids to Individuals Organizations | \$0                  | \$0                  |
| 10                       | Local Assistance                  | \$0                  | \$0                  |
| 11                       | One-time Financing                | \$0                  | \$0                  |
| 12                       | Debt Service                      | \$0                  | \$0                  |
| 13                       |                                   | \$0                  | \$0                  |
| 14                       |                                   | \$0                  | \$0                  |
| 15                       |                                   | \$0                  | \$0                  |
| 16                       |                                   | \$0                  | \$0                  |
| <b>17</b>                | <b>Total Cost</b>                 | <b>(\$8,100)</b>     | <b>(\$6,500)</b>     |
| 18                       | Project Positions Authorized      | 0.00                 | 0.00                 |
| 19                       | Classified Positions Authorized   | 0.00                 | 0.00                 |
| 20                       | Unclassified Positions Authorized | 0.00                 | 0.00                 |

**Decision Item by Numeric**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

| <b>Program</b> | <b>Decision Item/Numeric</b>   | <b>1st Year Total</b>                                 | <b>2nd Year Total</b> | <b>1st Year FTE</b> | <b>2nd Year FTE</b> |
|----------------|--|---|-----------------------|---------------------|---------------------|
|                | <b>3010</b>  | <b>Full Funding of Lease and Directed Moves Costs</b> |                       |                     |                     |
| <b>01</b>      | <b>Identification of the needs of the aged and disabled</b>          |   |                       |                     |                     |
|                | 31 Contracts with other state agencies                               | (\$8,100)   | (\$6,500)             | 0.00                | 0.00                |
|                | <b>Identification of the needs of the aged and disabled SubTotal</b> | <b>(\$8,100)</b>                                      | <b>(\$6,500)</b>      | <b>0.00</b>         | <b>0.00</b>         |
|                | <b>Full Funding of Lease and Directed Moves Costs SubTotal</b>       | <b>(\$8,100)</b>                                      | <b>(\$6,500)</b>      | <b>0.00</b>         | <b>0.00</b>         |
|                |  |   |                       |                     |                     |
|                | <b>Agency Total</b>  | <b>(\$8,100)</b>                                      | <b>(\$6,500)</b>      | <b>0.00</b>         | <b>0.00</b>         |

**Decision Item by Fund Source**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

|                      |                 |   |                  | 1st Year FTE     | 2nd Year FTE |
|----------------------|-----------------|---|------------------|------------------|--------------|
|                      | Source of Funds |   | 1st Year Total   | 2nd Year Total   |              |
| <b>Decision Item</b> | <b>3010</b>     | <b>Full Funding of Lease and Directed Moves Costs</b> |                  |                  |              |
|                      | PR              | S   | (\$8,100)        | (\$6,500)        | 0.00         |
|                      | <b>Total</b>    |   | <b>(\$8,100)</b> | <b>(\$6,500)</b> | <b>0.00</b>  |
| <b>Agency Total</b>  |                 |   | <b>(\$8,100)</b> | <b>(\$6,500)</b> | <b>0.00</b>  |

**Decision Item (DIN) - 3500  
Permanent GPR Reductions**

**NARRATIVE**

Permanent GPR Reductions

**Decision Item by Line**

**1315 Biennial Budget**

|                      |              |                                   |
|----------------------|--------------|-----------------------------------|
|                      | <b>CODES</b> | <b>TITLES</b>                     |
| <b>DEPARTMENT</b>    | 432          | Board on Aging and Long-Term Care |
|                      | <b>CODES</b> | <b>TITLES</b>                     |
| <b>DECISION ITEM</b> | 3500         | Permanent GPR Reductions          |

|           | <b>Expenditure items</b>          | <b>1st Year Cost</b> | <b>2nd Year Cost</b> |
|-----------|-----------------------------------|----------------------|----------------------|
| 01        | Permanent Position Salaries       | \$0                  | \$0                  |
| 02        | Turnover                          | \$0                  | \$0                  |
| 03        | Project Position Salaries         | \$0                  | \$0                  |
| 04        | LTE/Misc. Salaries                | \$0                  | \$0                  |
| 05        | Fringe Benefits                   | \$0                  | \$0                  |
| 06        | Supplies and Services             | (\$11,300)           | (\$11,300)           |
| 07        | Permanent Property                | \$0                  | \$0                  |
| 08        | Unalloted Reserve                 | \$0                  | \$0                  |
| 09        | Aids to Individuals Organizations | \$0                  | \$0                  |
| 10        | Local Assistance                  | \$0                  | \$0                  |
| 11        | One-time Financing                | \$0                  | \$0                  |
| 12        | Debt Service                      | \$0                  | \$0                  |
| 13        |                                   | \$0                  | \$0                  |
| 14        |                                   | \$0                  | \$0                  |
| 15        |                                   | \$0                  | \$0                  |
| 16        |                                   | \$0                  | \$0                  |
| <b>17</b> | <b>Total Cost</b>                 | <b>(\$11,300)</b>    | <b>(\$11,300)</b>    |
| 18        | Project Positions Authorized      | 0.00                 | 0.00                 |
| 19        | Classified Positions Authorized   | 0.00                 | 0.00                 |
| 20        | Unclassified Positions Authorized | 0.00                 | 0.00                 |

**Decision Item by Numeric**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

| <b>Program</b> | <b>Decision Item/Numeric</b>   | <b>1st Year Total</b>           | <b>2nd Year Total</b> | <b>1st Year FTE</b> | <b>2nd Year FTE</b> |
|----------------|--|---------------------------------|-----------------------|---------------------|---------------------|
|                | <b>3500</b>  | <b>Permanent GPR Reductions</b> |                       |                     |                     |
| <b>01</b>      | <b>Identification of the needs of the aged and disabled</b>          |                                 |                       |                     |                     |
|                | 01 General program operations  | (\$11,300)                      | (\$11,300)            | 0.00                | 0.00                |
|                | <b>Identification of the needs of the aged and disabled SubTotal</b> | <b>(\$11,300)</b>               | <b>(\$11,300)</b>     | <b>0.00</b>         | <b>0.00</b>         |
|                | <b>Permanent GPR Reductions SubTotal</b>                             | <b>(\$11,300)</b>               | <b>(\$11,300)</b>     | <b>0.00</b>         | <b>0.00</b>         |
|                |  |                                 |                       |                     |                     |
|                | <b>Agency Total</b>  | <b>(\$11,300)</b>               | <b>(\$11,300)</b>     | <b>0.00</b>         | <b>0.00</b>         |

**Decision Item by Fund Source**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

|                      |                 |                                 |                   | 1st Year FTE      | 2nd Year FTE |
|----------------------|-----------------|---------------------------------|-------------------|-------------------|--------------|
|                      | Source of Funds |                                 | 1st Year Total    | 2nd Year Total    |              |
| <b>Decision Item</b> | <b>3500</b>     | <b>Permanent GPR Reductions</b> |                   |                   |              |
|                      | GPR             | S                               | (\$11,300)        | (\$11,300)        | 0.00         |
|                      | <b>Total</b>    |                                 | <b>(\$11,300)</b> | <b>(\$11,300)</b> | <b>0.00</b>  |
| <b>Agency Total</b>  |                 |                                 | <b>(\$11,300)</b> | <b>(\$11,300)</b> | <b>0.00</b>  |

## Decision Item (DIN) – 5100 Medigap Helpline Database Upgrade

### NARRATIVE

The Board on Aging and Long Term Care (BOALTC) seeks expenditure authority to create and put into effect an improved, web-based database to supplant the current system in use by the Board on Aging and Long Term Care's Medigap Helpline. The upgrade would facilitate improved collection, recovery, submission to the federal Centers for Medicare and Medicaid Services (CMS), and security of data relating to the counseling services of the program. The anticipated cost of this proposal for the 2014-15 budget period is \$50,200.

### Decision Item by Line

1315 Biennial Budget

|                      |              |                                   |
|----------------------|--------------|-----------------------------------|
|                      | <b>CODES</b> | <b>TITLES</b>                     |
| <b>DEPARTMENT</b>    | 432          | Board on Aging and Long-Term Care |
|                      | <b>CODES</b> | <b>TITLES</b>                     |
| <b>DECISION ITEM</b> | 5100         | Medigap Helpline Database Upgrade |

|           | Expenditure items                 | 1st Year Cost   | 2nd Year Cost   |
|-----------|-----------------------------------|-----------------|-----------------|
| 01        | Permanent Position Salaries       | \$0             | \$0             |
| 02        | Turnover                          | \$0             | \$0             |
| 03        | Project Position Salaries         | \$0             | \$0             |
| 04        | LTE/Misc. Salaries                | \$0             | \$0             |
| 05        | Fringe Benefits                   | \$0             | \$0             |
| 06        | Supplies and Services             | \$13,100        | \$13,100        |
| 07        | Permanent Property                | \$0             | \$0             |
| 08        | Unallotted Reserve                | \$0             | \$0             |
| 09        | Aids to Individuals Organizations | \$0             | \$0             |
| 10        | Local Assistance                  | \$0             | \$0             |
| 11        | One-time Financing                | \$24,000        | \$0             |
| 12        | Debt Service                      | \$0             | \$0             |
| 13        |                                   | \$0             | \$0             |
| 14        |                                   | \$0             | \$0             |
| 15        |                                   | \$0             | \$0             |
| 16        |                                   | \$0             | \$0             |
| <b>17</b> | <b>Total Cost</b>                 | <b>\$37,100</b> | <b>\$13,100</b> |
| 18        | Project Positions Authorized      | 0.00            | 0.00            |
| 19        | Classified Positions Authorized   | 0.00            | 0.00            |
| 20        | Unclassified Positions Authorized | 0.00            | 0.00            |

## **Medigap Helpline Database Upgrade**

Decision Item 5100

**The Board on Aging and Long Term Care (BOALTC) seeks expenditure authority to create and put into effect an improved, web-based database to supplant the current system in use by the Board on Aging and Long Term Care's Medigap Helpline. The upgrade would facilitate improved collection, recovery, submission to the federal Centers for Medicare and Medicaid Services (CMS), and security of data relating to the counseling services of the program. The anticipated cost of this proposal for the 2014-2015 budget period is \$ 50,200.**

### **BACKGROUND**

The Medigap Helpline Program of BOALTC is unique among state programs. It is a provider of direct counseling and public information services to individual citizens of Wisconsin who are reliant on all forms of Medicare and related private insurance plans for their health care financing. BOALTC is the only state agency that provides direct counseling and assistance to aid these consumers seeking to understand the staggering array of choices offered to Medicare beneficiaries. All counseling and advice done by the Medigap Helpline staff is accomplished without direct endorsement or recommendation of any particular insurance product. The Medigap Helpline counsels new beneficiaries, persons who have been on Medicare for some time and who are now seeking to change the structure of their plan, persons who are seeking to add prescription drug coverage to their plan and persons whose plan is changing or ceasing operations. In all cases, the counselor must collect a large volume of personal information which must be entered into the agency's secure database, organized, stored and quarterly transmitted to the federal CMS.

The Board operates the Medigap Helpline to assist Wisconsin citizens to understand the changing framework of federal and state insurance plans for the elderly and disabled. Medicare is the most frequently cited issue of concern for callers, but many have other issues which interact with original Medicare. These concerns may arise from the caller's participation in other programs including Medicaid, Wisconsin SeniorCare, HIRSP, Medicare Advantage, commercial prescription drug plans, Medicare Part D, employer-sponsored group health plans, retiree plans and other private insurance. This past April, the Medigap Helpline program added three staff members and assumed responsibility under a grant from the State Health Insurance Information and Assistance (SHIP) through a contract with the Department of Health Services for a separate Part D Helpline focused exclusively on helping beneficiaries with their Medicare Part D drug plan questions. All of the data relating to these inquiries goes into the existing database. Facing a significant increase in the number and complexity of inquiries coming to the Medigap Helpline, the Board has experienced a substantial need to upgrade the capabilities and security of our data management system.

The current database is based on Microsoft Access and it has substantial limitations. The entire database must be closed, stored, and replaced with a new one approximately every six months as it is incapable of functioning well once a certain volume of information has been entered. The Microsoft product appears to be ill-suited to manage the rapidly increasing volume of information that is generated by this agency. As well, the current system requires significant effort by the agency's data specialist to retrieve and prepare data for submission to CMS as required by federal law.

### **PROGRAM ACTIVITY IN WISCONSIN**

The Medigap Helpline has been a substantial resource for Medicare beneficiaries since the early 1980s. Prior to its placement within the Board on Aging and Long Term Care, the program was operated by the Center for Public Representation, a private non-profit organization in Madison under contract with the state. Elderly and disabled consumers of Medicare and its related programs and their families have come to rely on the expertise and commitment of the Helpline staff to inform, educate, and empower them to advocate for their own interests. Each year, the ongoing refinement of Medicare and its associated

programs and policies brings about changes which are confusing and often frightening to beneficiaries who are dependent on this insurance system for their care. And, each year, more and more Wisconsin citizens in this situation contact the Medigap Helpline for our able assistance.

The counselors will frequently go out into communities around the state to provide local education and information programs in an effort to prepare elders and disabled persons for changes and updates to their Medicare related coverage. At these information sessions, the counselors engage in a certain amount of one on one direct counseling, but not to the extent that is possible when sitting at their desk in the office. The resources that are available in the office setting enable staff to tailor our counseling to a particular caller's concerns. This is a critically important part of the effectiveness of our program.

Changes to the federal government's structure of Medicare and economic influences affecting the insurance industry have caused notable expansion of the Medigap Helpline counselor's role. These changes include a remarkably more extensive and complex requirement of data collection and reporting. Aside from the requirement of sending data to CMS, we provide information to OCI, members of the Legislature and the Governor's office. These requirements, with their substantial requirement of security for individual consumer information and their resultant impact on the counselors' required scope of knowledge have made it increasingly difficult for our data collection and retrieval system to remain an effective tool. It is imperative that the Medigap Helpline be able to provide to store, retrieve, and report Medicare counseling data as required by the federal government. Under the current system, our ability to accomplish this task is strained to its breaking point.

Over the course of the past decade, the agency has developed a professional relationship with Harmony Data Systems for collection, management and reporting of our Long Term Care Ombudsman Program data and they have assured us that they will be able to develop a secure Medigap Helpline database similar in capability to the existing Ombudsman database at a reasonable price. Harmony has years of experience managing similar data collection and management tasks, and the company has an established relationship with CMS that has allowed them to effectively bridge the connectivity obstacles that interfere with effective submission of data.

#### REQUEST

We believe that it is of critical importance to continue this invaluable counseling and information service provided to Wisconsin's Medicare beneficiaries. The Board on Aging and Long Term Care finds that implementation of an upgraded data collection, storage, and retrieval system is critical to the continued effectiveness of the Medigap Helpline Program. With this in mind, the Board on Aging and Long Term Care requests budget authority to enter into a contract with Harmony Data Systems to develop and provide an internet-based system to manage and report the Medigap Helpline's stored data. The approval for this upgrade will allow the Board to maintain the Helpline's standards and effectiveness and to increase the program's flexibility so as to permit timely adaptation when Medicare Program changes occur. The upgrade will permit the Board on Aging and Long Term Care to fully meet the agency's statutory mandate to provide information, counseling and outreach services for the older citizens of Wisconsin. The Office of the Commissioner of Insurance has indicated its support for this decision item. The breakdown of the request is: First Year: \$37,100 (\$20,000 – one-time startup cost: \$4,000 – one-time IT support cost: \$13,100 – annual cost): Second Year: \$13,100 – annual cost. **The total cost of this upgrade for the biennium will be \$50,200 (PR – S).**

**Decision Item by Numeric**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

| <b>Program</b> | <b>Decision Item/Numeric</b>   | <b>1st Year Total</b>                    | <b>2nd Year Total</b> | <b>1st Year FTE</b> | <b>2nd Year FTE</b> |
|----------------|--|--|-----------------------|---------------------|---------------------|
|                | <b>5100</b>  | <b>Medigap Helpline Database Upgrade</b> |                       |                     |                     |
| <b>01</b>      | <b>Identification of the needs of the aged and disabled</b>          |  |                       |                     |                     |
|                | 32 Insurance and other information, counseling and assistance        | \$37,100                                 | \$13,100              | 0.00                | 0.00                |
|                | <b>Identification of the needs of the aged and disabled SubTotal</b> | <b>\$37,100</b>                          | <b>\$13,100</b>       | <b>0.00</b>         | <b>0.00</b>         |
|                | <b>Medigap Helpline Database Upgrade SubTotal</b>                    | <b>\$37,100</b>                          | <b>\$13,100</b>       | <b>0.00</b>         | <b>0.00</b>         |
|                |  |  |                       |                     |                     |
|                | <b>Agency Total</b>  | <b>\$37,100</b>                          | <b>\$13,100</b>       | <b>0.00</b>         | <b>0.00</b>         |

**Decision Item by Fund Source**

**1315 Biennial Budget**

**Board on Aging and Long-Term Care**

|                      |                 |  |                 | 1st Year FTE    | 2nd Year FTE |
|----------------------|-----------------|--|-----------------|-----------------|--------------|
|                      | Source of Funds |  | 1st Year Total  | 2nd Year Total  |              |
| <b>Decision Item</b> | <b>5100</b>     | <b>Medigap Helpline Database Upgrade</b> |                 |                 |              |
|                      | PR              | S  | \$37,100        | \$13,100        | 0.00         |
|                      | <b>Total</b>    |  | <b>\$37,100</b> | <b>\$13,100</b> | <b>0.00</b>  |
| <b>Agency Total</b>  |                 |  | <b>\$37,100</b> | <b>\$13,100</b> | <b>0.00</b>  |