

## AZ ABLE Oversight Committee Meeting Minutes

November 7, 2023

11:00am -12:00pm (MST)

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Brittaney Chipley, AZ ABLE Executive Director  
Robert B. Fleming, Committee Member, Chairman  
Jason Alan Snead, Committee Member  
Cassidy Taylor, Committee Member  
Grahame Richards, Committee Member  
Adam Clements, AHCCCS Office of Eligibility Training Manager  
Tara Cochran, AHCCCS Policy Analyst

1. Mr. Robert Fleming calls the meeting to order at 11:01 am.
2. Mr. Fleming welcomes everyone.
3. Mrs. Tara Cochran and Mr. Adam Clements provides an update on AHCCCS' ABLE staff training. Mrs. Brittaney Chipley will re-send the draft PowerPoint.
4. Mr. Fleming motions to approve the meeting minutes for 8/22/23. There are none opposed, and the motion carries unanimously.
5. Mrs. Chipley provides a quick overview of her latest presentation and outreach efforts. There are no questions, comments, or concerns regarding the reports.
6. Mrs. Chipley asks for feedback on the upcoming 2023 customer service survey. The Committee has agreed to re-word the question regarding tax deductions. Mrs. Chipley will make the changes and send the survey by email and include a link to the survey in the winter newsletter.
7. Mrs. Chipley provides an update on the AZ ABLE/ Ohio (OH) STABLE Partnership Agreement. The agreement is currently being finalized. It is with OH to review DES's feedback. Mrs. Chipley will keep the Committee updated and will send over the final agreement. The contract will be for a total of 7 years.
8. Department of Child Safety (DCS) will establish AZ ABLE accounts, serving as the representative payee for the children in their care who receive SSI benefits. DCS has everything they need to establish account. DCS will open 250-300 initial accounts and then 25-30 new accounts may be opened monthly.
9. Mrs. Chipley provides the following OH STABLE/Partner States Program Updates:
  - a. STABLE New Hampshire (NH) has elected to not continue in partnership with STABLE Account as of 10/26/23 to join the ABLE National Alliance. Existing NH account holders will experience no change in service or fees due to this decision.
  - b. Coulter King from True Link presented STABLE Card data, highlights, and enhancements.
  - c. Program Data Highlights
    1. As of 10/31/23, total program accounts: 36,770 (~5,000 increase for the year)

2. As of 10/31/23, total program assets: \$364M (~\$74M increase for the year)
  3. As of 10/31/23, total program accounts above \$100K – 44
  4. Bank Safe Yield: 5.38%
  - d. 2024 Annual/Lifetime Limits
    1. Contribution Limit: No news yet. Predicted to raise to \$18,000 but will inform everyone once received.
    2. ABLE to Work: \$14,580 (up from \$13,590 in 2023)
    3. Lifetime Max: No news yet but will inform once received.
  - e. Program updates/Reminders
    1. Plan Disclosure Statement Supplement – It will be issued at end of year. There is nothing partner states need to do. It will be updated electronically, and a paper copy will be sent to participants who request paper delivery.
    2. Enhanced FAQs for tax questions – These are on the website.
    3. Gifting by Debit Card on the Gift platform has been discontinued for now. There were problems with the vendor, and it was not used very much. Participants who have used this method have been notified.
  - f. New Entity Enhancements:
    1. Online Entity Reporting (now live)
      - i. Account Activity
      - ii. Account Balances
      - iii. Account Set-up in Process
    2. Online Entity enrollment (coming soon)
      - i. Will mirror current forms
      - ii. Will be able to open initial beneficiary account
      - iii. There will be a new form to allow Controlling Officer to name Agents, so they don't have to disclose personal information
  - g. Social Security Administration (SSA) & Payroll Direct Deposits is now live but is in a soft launch phase.
10. Mr. Fleming opens the forum for public comments. There are none.
11. Mr. Fleming adjourns the meeting at 10:32am.