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**INCOME MAINTENANCE ADVISORY COMMITTEE (IMAC)**

**February 19, 2026  
1:00 – 2:00 p.m.**

**Zoom Link:** <https://dhs.wi.zoomgov.com/j/1616714667>  
**Join by Phone:** 1-669-254-5252 | **Meeting ID:** 161 671 4667

| Time           | Topic  | Presenter(s)   |
|----------------|--|--|
| 1:00 PM        | Welcome  | Katie Sepnieski/Lorie Graff  |
| 1:00 PM        | Approval of January 15, 2026 Meeting Minutes (Attachment)  | Katie Sepnieski  |
| 1:05 – 1:20 PM | Department of Health Services Policy Updates   | DHS Policy   |
| 1:20 – 1:50 PM | Subcommittee Updates (Attachment) <ul style="list-style-type: none"><li>Income Maintenance Operational Analysis</li><li>Call Center Technical/Operational</li><li>Performance Monitoring</li><li>Elderly, Blind, Disabled/Long Term Care</li><li>Training</li><li>Fraud &amp; Program Integrity (Not Presenting)</li></ul> | Lorie Graff<br>Cindy Drury<br>Ann Kriegel/Nicole Rolain<br>Kara Ponti/Heather Merten<br>Shelby Jensen/Jesse Wolf |
| 1:50 – 1:51 PM | Income Maintenance (IM) Funding and Contract Updates   | Alicia Grulke/Lorie Graff  |
| 1:51 – 1:53 PM | Consortia Feedback: IM consortia will share feedback with DHS  | Lorie Graf   |
| 1:53 – 1:54 PM | Administrative Memos   | Alicia Grulke/Lorie Graff  |
| 1:54 – 1:56 PM | Regional Enrollment Network  | Lorie Graff  |
| 1:56 – 1:59 PM | Public Comment   | All  |
| 1:59 - 2:00 PM | Announcements/Future Agenda Items  | Katie Sepnieski  |

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\*If you want to participate by web meeting, you can follow along at your computer by logging in as a guest to <https://dhs.wi.zoomgov.com/j/1603539352>, 5 minutes ahead of time.

**Income Maintenance Subcommittee Key Messages**  
**Income Maintenance Operational Analysis**  
**February 6, 2026**

| Agenda Item        | Message/Action/Motion   | Assigned To/ Referred to IMAC | Deadline | Closure |
|--------------------|---|-------------------------------|----------|---------|
| DHS Policy Updates | <p><b>Health Care Updates:</b></p> <ul style="list-style-type: none"> <li>• Ops Memo is coming out related to the February project on updating address information for Healthcare members using information from reliable data sources.</li> <li>• DHS is working on changes required under HR1 to how the Social Security master death file is used. HR1 requires states to accept the file as verified and disenroll the member without requesting confirmation. This will be implemented January 2027.</li> <li>• CCN will be coming out next week that provides reminders related to processing healthcare applications for incarcerated individuals. Op Memo 14-49 is no longer valid policy to follow. DHS will reference Ch 45 in BadgerCare Plus handbook, Chapter 13 in Medicaid handbook, PH 3.19, PH 9.8, and PH 44.4.2.3 in the CCN.</li> </ul> <p><b>Untimely Action Items Processing:</b></p> <ul style="list-style-type: none"> <li>• Untimely processing concerns have come up around 2 Action Items: 1) 0072 Run eligibility for waiver MA and 2) MAPP members paying premium late. CCN will be coming out on this.</li> </ul> <p><b>ACCESS System Issues</b></p> <ul style="list-style-type: none"> <li>• PRT is receiving lots of reported issues with the ACCESS system.</li> <li>• Jodi reviewed the 3 situations where IM assistance to members is required:               <ol style="list-style-type: none"> <li>1) Initially if no enrollment or premium is being displayed. After confirming that everything is correct, the IM worker should refer the member to Member Services.</li> <li>2) Assisting members to unlock their ACCESS account(IM works with PRT to unlock).</li> <li>3) If there's an individual showing in a member's ACCESS account that shouldn't be there(IM may have to work with PRT on this).</li> </ol> </li> <li>• IM workers should refer members to Member Services for assistance related to issues such as trouble logging in to ACCESS, system errors, inability to upload documents,</li> </ul> | IMOA Members                  | On-Going |         |

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|                                     | <p>or when there is no enrollment showing in ACCESS after an IM worker confirms that no eligibility issues exist.</p> <ul style="list-style-type: none"> <li>• DHS confirmed that members are not required to present in person to verify their identity before receive assistance with unlocking their ACCESS account. The process for verifying member identity by phone can be found in Process Help.</li> <li>• To help prevent members being transferred back and forth between consortia and Member Services, DHS is asking IM workers to submit PRT tickets when appropriate so PRT can review these situations. No PII information should be included in the ticket. Instead, consortia should enter case comments or ask for a phone call from PRT to discuss details that include PII.</li> </ul> <p><b>CDPU Follow Up Reminder</b></p> <ul style="list-style-type: none"> <li>• Reminder to respond to CDPU staff when they contact consortia about issues with documents related to PII. CDPU has 10 documents from October that they are trying to resolve.</li> </ul> |              |          |  |
| MyWisconsin ID Update               | <p><b>MyWisconsin ID Update</b><br/>PPT presentation on the status of the MyWisconsin ID transition. 11 applications have been implemented so far, and they reviewed specific wave 6 plans.</p>   | IMOA Members | Ongoing  |  |
| EBT Quest Card Updates (attachment) | <p><b>EBT Quest Card Updates</b></p> <ul style="list-style-type: none"> <li>• To make it harder for thieves to steal benefits, DHS is changing Quest card functionality.</li> <li>• Effective March 1<sup>st</sup>, to use benefits in other states, members must change their QUEST card security settings to allow OOS transactions. This enables QUEST cards to be used OOS for the remainder of the month.</li> <li>• There is no limit to how often members can change their security settings, but there are more options for limiting OOS transactions if the member uses the ebtEDGE website or mobile app versus by phone.</li> </ul>  |              |          |  |
| OIG Updates                         | <p><b>CCW Conflict of Interest Audit Update</b></p> <ul style="list-style-type: none"> <li>• In response to a risk assessment in 2024 that identified concerns with IM workers being able to access cases involving potential conflicts of interest, OIG conducted an audit in 2025. OIG staff reviewed the audit process they followed with IMOA meeting attendees.</li> <li>• OIG has followed up directly with individual agencies and they shared red flags and improvement opportunities as part of their presentation.</li> </ul>   | IMOA Members | On-Going |  |

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|  | <ul style="list-style-type: none"> <li>• As a follow up to the audit, the Department is moving to implement a documented, consistent, and formal minimum baseline policy that defines clear expectations and consequences for accessing cases with conflicts.</li> <li>• The Division of Medicaid Services (DMS) will also move forward with requiring all CWW economic support workers to complete a revised user agreement that adds date of birth (DOB) as a required field and outlines the authority of DHS to obtain personally identifiable information for audit purposes.</li> <li>• IMOA attendees were put into breakout rooms to discuss the following questions -             <ol style="list-style-type: none"> <li>1. <b><i>What current conflict of interest process and policies do agencies have in place?</i></b><br/> <i>General Feedback:</i> <ul style="list-style-type: none"> <li>○ Many agencies indicate they have policy documents that they review with new ES Specialists, some review this annually and have ESS sign the policy document/agreement.</li> <li>○ Some consortia/counties hold these cases as confidential in a lead/supervisor caseload.</li> <li>○ Consortia request having more options around making a case confidential(ex- being able to make the case confidential for select staff).</li> </ul> </li> <li>2. <b><i>What challenges will agencies experience if this policy/process is signed annually by staff?</i></b><br/> <i>General Feedback:</i> <ul style="list-style-type: none"> <li>○ Every county has different encryption, which needs to be considered if DHS is asking for PII information.</li> <li>○ In small counties staff can't always avoid/even know right away when they are providing services to an individual where there's a perceived conflict of interest. There needs to be clear policy and process expectations outlined so staff avoid showing up on audit results inappropriately.</li> <li>○ Privacy concerns that would need to be reviewed by County Corp Counsel.</li> <li>○ There are other HSD staff that are given access to query CWW. They should be included in the audit, right?</li> </ul> </li> </ol> </li> </ul> |  |  |  |
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|  | <ul style="list-style-type: none"> <li>○ Suggestion that DHS develop annual training and sign off by all CWW users, maybe through Cornerstone?</li> <li>● <i>Written feedback from each breakout group was sent to DHS.</i></li> <li>● <i>Consortia leads were also asked to submit any written policies and documents their consortia/counties have around Accessing CWW and Conflict of Interest to DHS.</i></li> </ul>   |              |          |  |
| Genesys Update (Attachment)                    | <p><b>Genesys Updates</b><br/>Jonelle reviewed Genesys enhancements that have been completed, in development, and in discovery phase (see PowerPoint attachment for details).</p>   | IMOA Members | On-Going |  |
| FoodShare QC Metrics & Discussion (Attachment) | <p><b>FY25 Food Share Error Rate</b></p> <ul style="list-style-type: none"> <li>● While the final FY25 Food Share Active Error Rate is not final, with recession testing still needing to be done and sign off by FNS, right now it looks like Wisconsin will come it at 5.60%.</li> <li>● The top 5 Error Elements include wages and salaries, expired cert period, shelter and deductions, child support payments, and self-employment.</li> <li>● Wisconsin’s preliminary CAPER error rate for FY25 is 19.69%.</li> </ul> <p><b>Great Rivers SharePoint</b></p> <ul style="list-style-type: none"> <li>● Great Rivers presented on how their consortium is using their SharePoint site to communicate QA information with staff. Supervisors use information on the site to meet with staff and the information is always accessible to staff. The site includes error rate information, information on common errors found, GRC’s PCR process, Q &amp; A, and quick links to training. Consortia should reach out to Ronda for more information.</li> </ul> | IMOA Members | Ongoing  |  |
| Preliminary Legislative Audit Bureau Findings  | <p><b>Preliminary Legislative Audit Bureau Findings</b></p> <ol style="list-style-type: none"> <li>1. Continued CHIP finding for 19 year olds. It has improved from last year but DHS reminded consortia to please continue to work the report.<br/>** If consortia have examples of an action item not showing up/not showing up timely, they should send that to PRT.</li> <li>● SWICA’s not being processed timely. DHS shared that they are working on a project with Deloitte to improve how SWICA are identified and resolved. The Department</li> </ol>  | IMOA Members | Ongoing  |  |

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|                                   | plans to provide an update and review options at an upcoming IMOA meeting.  |              |          |  |
| Future Agenda Topics (Attachment) | <b>Future Agenda Topics</b><br>Policy Updates, Food Share QC Metrics, Genesys Updates, SWICA options from Deloitte, Customer Experience data, Update on AI Initiatives, Process Help Reorganization | IMOA Members | On-Going |  |

**Income Maintenance Subcommittee Key Messages  
Call Center Operational Technical Subcommittee  
January 26 & February 9, 2026**

| Agenda Item                            | Message/Action/Motion  | Audience/Recipient | Assigned To | Deadline |
|--|--|--------------------|-------------|----------|
| Reminder – Opening tickets in Genesys. | <p>Opening tickets (User Guide 11.2) – should come directly from the User, after troubleshooting attempts have been done at local agency.</p> <ul style="list-style-type: none"> <li>• Preferred method is by email. <a href="mailto:helpdesk@wi.gov">helpdesk@wi.gov</a></li> <li>• Do not use an old ticket notification.</li> <li>• Descriptive Subject line is important.</li> <li>• Body of email – Interaction ID (copy and paste – not screen shot), along with as many relevant details as possible, including screen shots.</li> </ul> <p>Discussed the ticket prioritization. This is also in the Genesys User Guide 11.2.4</p> <p>Critical tickets – User should copy in <a href="mailto:dhsgenesyscouldproject@dhs.wisconsin.gov">dhsgenesyscouldproject@dhs.wisconsin.gov</a></p> <ul style="list-style-type: none"> <li>• Single User issues are not critical or high priority.</li> </ul> <p>General questions can be sent to:<br/><a href="mailto:dhsgenesyscouldproject@dhs.wisconsin.gov">dhsgenesyscouldproject@dhs.wisconsin.gov</a></p> |                    |             |          |
| Enhancement Requests                   | <ul style="list-style-type: none"> <li>• Outbound Transfer to a queue (currently delayed). Does not include callback.</li> <li>• Update to ATS prompt #8 – adding some information regarding work rules. More information to come.</li> <li>• Bringing back Callback exclusions – certain numbers not being offered callback.</li> <li>• Adding call start time to caller data. Date and Time when the call came into the system.</li> </ul> <p><b>2/9/26 Update:</b></p> <ul style="list-style-type: none"> <li>• A display for agents to know when the call came into queue. available 2/17/26</li> <li>• Outbound transfer to a queue – available 2/17/26</li> </ul>  |                    |             |          |

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|                           | <ul style="list-style-type: none"> <li>• Update to ATS prompt #8 – in production starting 2/23/26.</li> <li>• TBD – timeline for Callback exclusions. Lobby or shared phones from certain numbers can be excluded from callback.</li> </ul>   |  |  |  |
| Post call survey          | <p>Genesys indicating 2 surveys on a single interaction – fix has been applied and is being monitored. Communication will come out after monitoring concludes it’s resolved.</p> <p>Scoring for a single question:</p> <ul style="list-style-type: none"> <li>• Yes=1 pt</li> <li>• No=0 pt</li> <li>• Star=Question is not scored</li> </ul> <ul style="list-style-type: none"> <li>➤ 100/100 callers answer yes to question 1 ▪ Question 1 Score: 1.0 –</li> <li>➤ 50/100 callers answer yes to question 2 ▪ Question 2 Score: .50 –</li> <li>➤ 33/100 callers answer yes to question 3 ▪ Question 3 Score: .33</li> </ul> <p>Paul demonstrated pulling post call surveys by queue and showing results for each question.</p> |  |  |  |
| New Agent status Requests | <p>New statuses will be available Monday- 2/2/26.<br/>This update was successful.</p>   |  |  |  |
| Enhancements Completed    | <ul style="list-style-type: none"> <li>• When using the start and end buttons on an ATS, a voice command states, “recording started” and recording ended”.</li> </ul>   |  |  |  |
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| Next 2 Meetings           | <p>Monday, March 9, 2026 @ 1:00pm<br/>Monday, March 30, 2026 @ 1:00pm</p>   |  |  |  |

**Income Maintenance Subcommittee Key Messages**  
**Performance Monitoring**  
**January 21, 2026**

| Agenda Item                          | Message/Action/Motion   | Audience/Recipient  | Assigned To    | Deadline |
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| Mock FSQC interview                  | Informational for attendees-invite shared broadly<br>-Lisa Hanson’s name and number is listed in comments LOC<br>-About 88-90 cases pulled/month<br>-Targets a specific month, if errors found-reviews certification month/cert period<br>-Ask to have a recorded mock interview available-will take back   | All Income Maintenance staff involved in QC process/Operational leads | LaTanya Taylor |          |
| PCR report demo                      | -Accessed through Analytics for CARES/Tableau<br><a href="https://analyticscares.wisconsin.gov/#/home">https://analyticscares.wisconsin.gov/#/home</a> (link on Gateway page)<br>-Request access through CARES AIMS-access request form 00476<br>-4 dashboards: PCR Error Monitoring, PCR Outcomes for IM Workers, PCR Timeliness and Efficiency, PCR Sample Criteria Effectiveness<br>-Select timeframe in global filters on left, consortium, agency-unselect all first, work item type<br>-Detail views only reflect consortium specific data<br>*Note-data may be artificially skewed toward a certain error type if only certain pages are reviewed reflecting errors for that page only and omitting potential other errors on other pages<br>-N/A is not counted in error. (only “other” is brought in to dashboard)<br>-Is allotment variance rate calculating correctly? send data calculation concerns with reports to PRT and <a href="mailto:dhsdmsdatamanagement@dhs.wisconsin.gov">dhsdmsdatamanagement@dhs.wisconsin.gov</a><br>-Once eligibility is confirmed, the review is counted in completed review data<br>-Help text available in upper right corner “?”<br>-Hovering over data points in reports reveals text about how data is calculated and detailed views (when available). | All Income Maintenance staff involved in QC process/Operational leads |                |          |
| Agenda items not covered due to time | Recap-Nov meeting (reference Nov Key messages)<br>Charter & Participant responsibilities (will be moved to future agenda)<br>Consortia Report (emailed to subcommittee)<br>HCQC error findings (emailed to subcommittee)  |   |                |          |
| FSQC error findings                  | From August 2025-<br>Active error rate 5.96%, cumulative 5.72%<br>17.74% CAPER-cumulative 19.04%  |   |                |          |
| Policy Check in                      | -Fatal system errors-Jody aware and documenting; timeframes for   |   |                |          |

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|                           | <p>resolutions not always control-send in examples</p> <ul style="list-style-type: none"> <li>-Fatals daily at 9:00 AM</li> <li>-Access to employer medical screen-need to say no to get past; looking to see if this can be added for June release</li> <li>-10-15 cases with renewals showing late that weren't; ticket got closed when not resolved. Reach out to Jody and Manee when this happens so it can be corrected in the moment</li> <li>-FS renewal timeliness-completion date after confirmation date; do we need to process day received? Ask for clarification prior to end of the month</li> <li>-QV action items-populating after due date as over due</li> <li>-Dashboard items-on FSoD tool and other dashboards—some can be DEAR cases-won't show on tool</li> <li>-Call out to share FS supplements or late renewals policy trainings as they relate to unclear</li> </ul> |  |  |  |
| Member updates            | Welcome to Barb Popera with Moraine Lakes   |  |  |  |
| Next meeting agenda items | If any come up-email Nicole Rolain and Ann Kriegel  |  |  |  |

**Income Maintenance Subcommittee Key Messages  
Elderly, Blind, Disabled/Long Term Care  
January 20, 2026**

| Agenda Item                  | Message/Action/Motion   | Audience/Recipient  | Assigned To | Deadline |
|------------------------------|---|---|-------------|----------|
|                              |   | Examples: All Income Maintenance Agencies, ESPAC, Operational Leads |             |          |
| EBD/LTC Charter and meetings | <p>-Previous meeting: the group came up with 5 goals however would like to pull back to 3-4 in order to focus attention more. Chose to focus on goals 1, 2 and 5 (4 will also be included in the work of 2 but not be the priority)</p> <p>-Group agreed to up the frequency of the meetings from quarterly to every other month starting in March 2026.</p>  | All IM agencies   |             |          |
| DHS updates                  | <p>-Jody provided a PRT update on the Social Security data exchange issues. Her team continues to work with Deloitte and other DHS teams to find the causes of the issues, develop plans for implementation of fixes and any fixes that can be done currently to fix some of the errors on a case by case basis. IM agencies are asked to continue to send in case errors to PRT.</p> <p>Jody will take back questions about what other information is available in the data files from SSA to determine if some of the information we seek often from SSA could be there.</p> <p>Jody reports some MAPP cases were incorrectly closed 1/31/26 prior to adverse action and had paid their December premium. Only about 40</p> | All IM agencies   | Jody/PRT    |          |
| SSA/Medicare/COLA discussion | <p>Discussion on how consortia are working through COLA changes that don't always update correctly or at all along with the issues with the Social Security Data exchange and difficulties getting through to Social Security to clarify anything we have questions on.</p> <p>Many counties report having to be resourceful and utilizing many different avenues of information such as trying SSA (some more successful than others), reaching out to members, reviewing prior history in the case to determine if other information may be available.</p> <p>Some suggestions such as general timelines were made for updates to Process Help—this was taken back by Jody for review.</p>                                  | All IM agencies   | Jody/PRT    |          |

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| <p>Open discussion time</p> | <ol style="list-style-type: none"> <li>1. What are counties doing to verify sources of extra deductions taken from social security such as taxes, premiums, federal debt, etc.?</li> </ol> <p>Consensus is that the expenses are on the member to report if agency does their due-diligence with check all available resources such as child support. There may be resources with your ADRC that help determine if deductions are additional Medicare C/D premiums.</p> <ol style="list-style-type: none"> <li>2. Prepaid deductibles—how are agencies finding out about these if members are not paying them at the local agency?</li> </ol> <p>Many are directing their members to pay at the local agency 1<sup>st</sup>, some have created a form that gets sent out to members who express interest in prepaying. Some have had luck calling Estate Recovery to track the payments that are sent directly to the state. A request was made for an email address to easily contact about these payments.</p> <ol style="list-style-type: none"> <li>3. Group A fair hearings—anyone seeing an uptick in fair hearings as a result of the group A waiver report?</li> </ol> <p>A few agencies reported some but most were withdrawn after discussion with members.</p> <ol style="list-style-type: none"> <li>4. Katie Beckett Aging out when on IRIS ages 18-19— noticing some timing issues with getting in an adult MA application.</li> </ol> <p>Jody requested examples be sent to PRT if there are any concerns with the way the process is worded or issues that are being found. It was reported that IRIS is up for its federal review and some of the member difficulties are being explored and discussed. Some discussion around other possible options when transitioning 18/19 year old off of one form of Medicaid to another when receiving some sort of long term care services.</p> <p>Some discussion about a recent CLTS coordinators notice—link to this was shared with attendees. DHS has not announced any updates to IM processes as a result of this CLTS coordinators notice.</p> | <p>IM agencies</p> | <p>DHS</p> |  |
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**Income Maintenance Subcommittee Key Messages  
Training  
January 26, 2026**

| Agenda Item                       | Message/Action/Motion   | Audience/Recipient | Assigned To | Deadline |
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| 2026 Goals and Charter (Handout)  | <p>Shelby reviewed the 2026 charter.</p> <p>Goals</p> <ol style="list-style-type: none"> <li>1. Asking reps to engage in feedback.</li> <li>2. Engagement in refresher trainings.</li> <li>3. Discuss and share best practices, resources, training plans.</li> <li>4. Continue to gather feedback on published trainings.</li> </ol>   | All                | N/A         | N/A      |
| IM Training Projects (Handout)    | <p>Abby reviewed the handout listing which trainings have been updated.</p> <p>No trainings were removed from Cornerstone.</p> <p>Several upcoming trainings will be coming due to February CARES release and LTC updates.</p> <p>A question was asked if the trainings would address the form to exempt the income for live-in care providers for BadgerCare. This will be taken back to see if it needs to be added.</p>  | All                | N/A         | N/A      |
| HR1/ABAWD Training Plan (Handout) | <p>CARES release will go live Feb 21<sup>st</sup>.</p> <p>The first training on the list is intended for all workers, including new workers. Published date of Feb 6<sup>th</sup>.</p> <p>The existing computer-based trainings on the list have some minimal changes that will be published on Feb 23<sup>rd</sup>.</p> <p>NWT Trainings will be first taken in the March cohort. Members in the Feb cohort can retake these trainings after Feb 23<sup>rd</sup> for updates if interested.</p> <p>Training announcements will be sent out as trainings are published.</p> | All                | N/A         | N/A      |
| Refresher Trainings               | <p>Prioritized trainings from 2025</p> <ul style="list-style-type: none"> <li>-Student Eligibility</li> <li>-How to Read Data Exchanges</li> <li>-Eligibility Run results (split into two trainings)</li> </ul> <p>It was mentioned that in the moving across assistance group</p>  |                    | N/A         | N/A      |

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|                    | <p>trainings, it may be helpful to have more explanation as to what is happening in some situations. Also, the part about reading out all the assistance group acronyms could be avoided by asking workers to read the list. The explanations of the categories has been great.</p> <p>Feel free to send any additional feedback to DHS IM Training</p> <p>There were some updates for the FS Student Eligibility refresher training to include policy clarification that was found.</p> <p>Recently published QC overview as the training was rehailed focusing on up to date QC info.</p> <p>Currently in the process of overhauling the Pretax Deduction training as well. Will announce once it is available.</p> <p>It is also now time to start considering the 2026 trainings to prioritize. The survey will be coming in February. Please complete the survey and give feedback on what trainings you would like to see prioritized. This will be discussed at April meeting.</p> |     |     |     |
| New Worker Updates | <p>Updates were shared based on training gaps.</p> <p>Adverse Action – added additional clarifications as part of change processing and BC+ validation to test workers knowledge.</p> <p>Running with dates – embedding more activities (what day is it change report scenario). Looking for additional things to add to enhance in the future as well.</p> <p>Linking and Merging – adding an activity that help workers identify the process of linking and merging.</p> <p>Looking to enhance existing child support content currently for VILT.</p> <p>Local coaches should continue to list training gaps on local coach surveys.</p> <p>The new Coach’s Guide is available on Cornerstone now.</p> <p>Removed contingency days and replaced with a full conclusion week in the cohorts.</p> <p>Updated BC+ ongoing and MA ongoing CBT have been updated with most recent info.</p>  | All | N/A | N/A |

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|                             | Genesys Agent training was updated to include the changes with Genesys and is included as part of the NWT curriculum.  |     |     |     |
| Training Feedback (Handout) | <p>Abby Reviewed September-November 2025 survey results.</p> <p>A question was asked about how the reports are counting survey response from coaches vs. the number of new workers, as well as if MILES is included. Abby stated this will be investigated.</p>  | All | N/A | N/A |
| Training Roundtable         | <p>How do agencies ensure annual trainings are completed?</p> <p>Bay Lake: Tries to plan a time that works toward the beginning of the year to get staff though it. Then revisit later in the year to complete any who have not yet completed. Often times can use late call center opening day to complete them. Staff send screenshots of certificates to conform.</p> <p>Capital: Very similar to Bay Lake, using their Thursday afternoon when the call center closes early to complete them. Uses a spreadsheet by asking DHS to run a report to confirm who has completed it.</p> <p>Central: Similar to others, spreadsheet to track staff and use times when no all staff meeting is completed and they assign the trainings out. Workers send in proof for tracking.</p> <p>East Central: Keep a spreadsheet and reviews this throughout the year to make sure staff are completing these.</p> <p>Green Lake: Use meetings as a joint training time where staff will do it together, that way they can get it all done at one time and be confirmed. Tries to get them done at the beginning of the year.</p> <p>MILES: Keeps a training tracker spreadsheet that gets updated throughout the year which goes out to the entire agency. Staff keep track of the trainings they completed and give quarterly due dates to upload these to the shared drive. Mandatory trainings are required to be completed within the first two months of the year. Supervisors create a schedule for when staff should complete the trainings.</p> <p>Moraine Lakes: Similar to previous responses, tracks throughout the year.</p> <p>Northern: Keep track of all annual trainings and other trainings that staff keep on a jot form before being compiled into a master</p> | All | N/A | N/A |

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|  | <p>list and following up with anyone who has not yet completed. Usually completed on late start mornings (Thursday).</p> <p>Southern: Use a spreadsheet and assigns trainings on Thursdays if no agency meeting. Staff email to supervisor and is logged on a tracker.</p> <p>Western: We choose a week usually in the first quarter of the year to assign these to staff to do based on their off phone time. These are tracked by our clerical staff who our workers send screenshots.</p> <p>WGRP – Both Racine and Kenosha keep own spreadsheets to track. Usually completed Friday afternoons as the call center is closed. Everyone sends completion certificates and placed in staff folders.</p> |  |  |  |
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