IMAC TATA MEETING
9/21/05
Meeting Minutes

Attendees: Dave Hippler, Melody August, Jenny Hoffman, Tricia Bless, Theresa Fosbinder, Paulette Penick, Keli Poppe, Jaqaie Coutant

Announcements:
Melody August is replacing Vicki Jessup as the QA rep, Julie Loebel's contract ended and she will no longer be part of the training team or on this group, Russell Yancey will no longer be on this group, a replacement from Milwaukee/TATA co-chair needs to be discussed.

CWW Information sharing:
Dane – mandatory transition was "smooth". The learning curve has flattened. New workers are learning things faster than experienced ones. There has been an impact on new worker training – may take les time to train FS in class.

Jackie asked about what can be done to prepare for the transition, and talked about the challenges working with the W2 agencies to coordinate this.

Margaret talked about making good use of the CARES coordinator to help with technical issues and "weirdness cases", and to identify and communicate trends. She said that having a central point of contact is good. CARES coordinator also sent out a summary of issues and trends to sups so they were aware.
Also – any case the call center touched they would transition so that forced people to have a reason to use the CWW.

Issues of speed came up – the IT survey and associated issues were discussed. Also the fact that the learning curve will slow people down initially.

Jenny said that they based a plan on Dane's and wanted to get to 35% transitioned. They mandated doing mail in apps at a certain point in time. Jenny has been available on the floor to help. People have been having problems with the dynalist. They have done information sharing about the trends and trouble spots and tips. They have had to get used to tabbing, and using the first letter of the word in the drop down.
Jenny asks them to demonstrate how they do things and if they don't do it most effectively she walks them through how to do it. One on one with certain staff is helpful.

There was a description of "mastery" - getting over the learning curve = knowing what is on the bottom of the page so you are comfortable you entered it correctly and don't have to spend time scrolling. Familiarity with the screens and screen layout are key. Talked about the need for a scrolling mouse – also may need keyboard shortcuts to avoid having to buy new mousse (mice?). Staff is not used to using a mouse. They may also not have a tray large enough for both a mouse and a keyboard.

Jaqaie talked about the IT problems they have been having in Milwaukee, as well as issues with staff – ESL, lower literacy staff had problems with the training.
Workers may have had issues with the training but were not consistently aware of or doing the evaluation.

CWW Non Core" user training
Query only users will start using CWW in the spring of 06. The approach will include marketing to let them know this is what they should do, an Ops memo on confidentiality including who should and should not have access to CARES/CWW, and a tutorial based generic training package available to all query users.
There was discussion about the fact that this material also might help clerical workers in the county who use CARES for certain query only (but not necessarily CR) functions.

ACCESS Update – Autumn Arnold
See handout

CWW 1.4 Training
Audiences
AQ screens – all CR and AE staff
Asset assessment – AE staff (specifically EBD/LTC folks)
Case transfer – all CR and AE staff
Add/Delete person – AE staff

Want to be able to choose which pieces people take within their assigned curriculum, as not all pieces apply to all workers.

The group agreed that the training should be mandatory, but that we couldn't require the courses within the curriculum, because agencies needed to make a determination of which workers needed which pieces.

They also agreed that we could have 1.4 CR and 1.4 AE and assign the same way we did for initial CWW training – that would be consistent with the audience designations above.

Suggestion is to create a summary course the explains all the changes in enough detail to know what they impact, so people can determine which of the in-depth pieces they need to taken. Then, this summary course would be required, and the in-depth topics would not be, to allow maximum flexibility. The group would like to see some options for how we could structure the delivery of this, and then have another chance to give input. (Can be done over email).

They would like some sort of progress reporting during the training period.

Several members agreed that confusion still exists over the difference between mandatory and required.

Changes to Pathlore (PTS Learning Center)
There were changes made to the PTS Learning Center that still need to be marketed properly – for example, people were having problems finding what they needed for new workers. These changes were driven by the fact that we want to get anything that is actually training material into the PTS learning Center where we can track it, and off of the PTS Website. DWD has some timeline mandated associated with getting stuff off that PTS website, and so some things were moved into the Learning center that still have to be communicated properly. There was some discussion about this, and some problem solving on specific issues. We decide we will talk about this more at the next meting.
UPDATE: See attachment 1 for an explanation of this that went out to the CARES/Policy coordinator distribution list on 10-12-05.

ECF
There was ad hoc impromptu discussion of best practices in ECF. The group really wants to see some of the best practices published for all to see as they come up on ECF. Dave listened to this discussion and will factor it into the work being done. We will have an agenda item to talk about ECF next time.

Adaptation Roundtable Proposal
Theresa discussed a proposal from BEM management. This is partly in respone to the TATA issues that have been raised on the past around worker "saturation" and workload management, and the need to address this with training or some other method.
This is to address all the multiple and various initiatives that have occurred over the past several years, and their individual and cumulative impact on agency operations, workflow, and workers.
BEM's idea centers around a series of events where we would bring IM managers and supervisors together to discuss all of the innovations in policy, process and information technology (reduced reporting, self-declared income verification, broad-based categorical eligibility, mail-in applications and reviews, the Electronic Case File, Automated Case Directory, CARES Worker Web, etc.) that have been implemented in the last several years. The point of this meeting would be to provide county agency decision-makers with the tools they need to get the most out of these 'improvements' based upon their own local business process. For instance, we know that what worked in Dane County may not be applicable to Ashland. We appreciate the uniqueness of every agency in terms of caseload, case mix, experience of workers, number of workers, funding availability, etc. By providing county managers and supervisors with business process analysis training & tools, a complete discussion of changes that need to be taken into consideration when doing that analysis and a sense of best practices, we're hoping that they can go back to their agencies and improve the efficiency and effectiveness of their operations.

Reactions:

- Need to make sure this has a real impact on workers
- In person team building has been missing since there is not face to face training anymore
- Need to have decision makers there
- Got inspiration at the last FS conference
- There could be a gap in the communication between who is there and what comes back to the worker level
- The intent is really "how do we keep them on top of the game? Is everybody doing this the most efficient way?"
- The high powers in the agency have to recognize the changes in the environment
- Need help at the worker level – like with organization
- Need to help struggling workers prioritize, help new workers get organized
- Want the opportunity to talk with others with like issues – e.g., don't put Milwaukee alone – "when you are talking to yourself you don't always get the best answers".
- Feeling like they have to figure stuff out on their own no mater what
- Discussion about the TACs to help with immediate technical assistance issues
- Need to re-establish relationship with resources – over the years some connections have been lost

Bottom line: Want to understand this better to totally buy into it, want to make sure the outcome ultimately benefits the line worker.

Update: This idea was presented to the IMAC meeting in October and they approved going ahead with it. A PowerPoint presentation that was distributed to the IMAC is being sent along with these minutes.

Topics for future meetings

- Pathlore update
- ECF update
- Adaptation Roundtable update

Changes to the New Worker Training Process

As a part of our efforts to consolidate and streamline access to Partner Training Services training materials, there have been some changes in the mechanics of accessing New Worker training topics. Changes to the New Worker process include:

1. Updates to the Registration Profile form
2. Converting ITPs to curriculum in the PTS Learning Center
3. Moving the classroom training schedule to the PTS Learning Center

To begin your new worker process, go to
http://dwd.wisconsin.gov/dwspts/nw_process.html
The Process page provides a brief introduction and step-by-step instructions on how to proceed with your new worker. Tools such as the registration profile and the multiple registrations form can be found here along with other important information about new worker training.

The ITP form has been converted to an online curriculum for new workers. This means that the PTS Learning Center will now present a list of required training topics for each new worker. A curriculum is assigned to a new worker based on the information on the Registration Profile. It is possible that a new worker will have more than one curriculum assigned, based on the job functions he or she performs in the agency. If a worker needs to take multiple curricula, there may be some topics that appear more than once on their list. This does not mean the new worker must complete the topic multiple times. The PTS Learning Center is designed to recognize that if the worker completes the topic once it will count as completing all instances of the topic. If you believe the PTS Learning Center does not accurately reflect the new worker's progress though the training curriculum, contact the PTS Learning Center staff at ptsreg@uwosh.edu or by phone at 920-424-1071.

The profile form changes focus on identifying the correct curriculum for each new worker. There is now a section on the form that asks you to choose all curricula the worker must take. The last page of the profile form contains a description and a matrix to help you make the correct choice. If you would like to see a complete listing of topics included in any curriculum you can access a list on the IM/TANF New Worker Training Process page at http://dwd.wisconsin.gov/dwspts/nw_process.html . If you are still unsure how to proceed, contact the appropriate new worker training lead, as listed below.

IM related questions
Carol Hazlewood, DHFS New Worker Training Coordinator
carolhaz@centurytel.net or 920-346-5715

W-2/CC/TANF related questions:
Lynda Fischer, DWD New Worker Training Operations Lead
lynda.fischer@dwd.state.wi.us or 608-576-5891.

Note: Individuals who perform clerical functions only have no training requirements. Individuals who perform clerical functions and Client Registration also have no training requirements. However, it is the agency's responsibility to ensure appropriate training. In these cases, Client Registration and Introduction to CARES Worker Web are recommended, at a minimum.

The schedule of new worker classroom training has also been moved to the PTS Learning enter. To access the schedule, go to the PTS Learning Center and follow these steps:

1. Click class schedule on left side of page
2. Choose IM/W-2 New Worker classes from the drop down menu
3. Leave the title field blank
4. Modify the date range if necessary (defaults to one year from today)
5. Click Go

This will bring up a list of all NW classroom topics scheduled for the next year. You can resort this information using the dropdown list at the top of the results box. For example, if you choose Sort by City, the list will be reorganized so that it shows up by city, and then by date order for that city. You can also put this into a calendar view by clicking the link in the upper right corner of the page.

If you are looking for a specific training topic and are not a new worker, you can still find that topic in the Course Catalog. To locate a topic:

1. Go to the PTS Learning Center home page
2. Click Course Catalog on the left side of the page
3. Choose All Courses from the dropdown list
4. Type in part or all of the course title you are looking for
5. Click Go

This will bring you a list of results, where you can then select the course for more detailed information.

Our efforts to move all training materials to the PTS Learning Center will continue in the upcoming months. We will notify you of further changes as they occur. If you have questions at any time, please contact the appropriate new worker training lead.