

Chapter HSS 217

TRAINING OF INCOME MAINTENANCE WORKERS

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HSS 217.01 Introduction. (1) **AUTHORITY AND PURPOSE.** This chapter is promulgated under authority set forth in s.46.033(2), Stats., to ensure that each income maintenance worker employed by a county or tribe has successfully completed a training program to achieve acceptable IM worker job performance, including to accurately determine and redetermine eligibility for income maintenance programs. Successful completion of prescribed training is required for all new IM workers. The department is to make refresher training on error-prone policies and interpersonal skills available for experienced IM workers.

(2) **APPLICABILITY.** This chapter applies to county income maintenance agencies, tribal income maintenance agencies and the income maintenance workers employed by those agencies.

History: Cr. Register, January, 1991, No. 421, eff. 2-1-91.

HSS 217.02 Definitions. In this chapter:

(1) "AFDC" means aid to families with dependent children, a public assistance program under Title IV-A of the Social Security Act of 1935, as amended, and ss.49.19 to 49.41, Stats.

(2) "Case maintenance" means reviewing all incoming information for a recipient of income maintenance and making a redetermination of eligibility based on changed circumstances of a recipient to ensure that the recipient continues to receive the proper benefit level and is in fact eligible for continued benefits.

(3) "Case processing" means all of the contacts, completion of forms, referrals and verification of information which are conducted in conjunction with making a determination of the eligibility of an applicant for income maintenance or a periodic complete redetermination of the eligibility of a recipient of income maintenance.

(4) "CRN" means computer reporting network, the department's computerized system which, using data provided by applicants, electronically determines the eligibility of applicants for income maintenance, calculates benefit amounts, produces benefit documents and electronically retains data in historical files.

(5) "County agency" means the agency established under s.46.215, 46.22, or 46.23, Stats.

(6) "Department" means the Wisconsin department of health and social services.

(7) "Determination of eligibility" means the act or process by which the situation of a person or a group is compared to a set of standards to determine whether the person or group meets the criteria for receiving a specific type of income maintenance.

(8) "Experienced IM worker" means an IM worker employed by a county or tribal agency before February 1, 1991, or an IM worker who has completed initial income maintenance training.

(9) "Food stamps" means an assistance program under 7 USC 2011 to 2029, as amended.

(10) "Income maintenance" or "IM" means AFDC, MA, food stamps or RNIP.

(11) "IM handbooks, manuals and instructional materials" means department-issued income maintenance handbooks, manuals and memos addressed to county and tribal agencies which set forth eligibility and benefit criteria for AFDC, MA, food stamps and RNIP, and case processing and case maintenance information.

(12) "Income maintenance worker" or "IM worker" means a person employed by a county agency or tribal agency whose duties, as specified in his or her position description, include determination or redetermination of income maintenance program eligibility and benefits.

Note: An "income maintenance worker" in a particular county may have a different job title, such as economic support specialist.

(13) "Initial income maintenance training" means an approved curriculum of courses, independent study and closely supervised practical experience which totals at least 100 hours, and which includes training in both interpersonal and technical skills needed to perform the IM function.

(14) "Medical assistance" or "MA" means an assistance program operated by the department under Title XIX of the Social Security Act of 1935, as amended, and ss.49.43 to 49.497, Stats.

(15) "New IM worker" means a person who is employed by a county or tribal agency as an IM worker on or after February 1, 1991, including a permanent employe who transfers into an IM worker position and who has not completed initial income maintenance training.

(16) "Ongoing training" means refresher training and training in interpersonal skills.

(17) "Redetermination of eligibility" means a periodic complete review of the eligibility of an IM recipient or a review of eligibility based on changed circumstances of the recipient.

(18) "Refresher training" means training on error-prone and difficult IM policies.

(19) "Regional training consortium" means a group of county and tribal agencies in a multi-county area of the state constituting a region for the department for administrative purposes, which participate together in training programs provided by the department.

(20) "RNIP" means relief of needy Indian persons, an assistance program under s.49.046, Stats.

(21) "Successful completion of IM training for new IM workers" means attendance for all class hours, participation in classroom training, and the completion, as determined by the department or through evaluation strategies developed by a county or tribal agency to ensure that a

minimum standard of competence is achieved, of all activities that are to take place before and after the instructional part of the training but that are administered as part of the training.

(22) "Successful completion of IM training for experienced IM workers" means attendance at refresher or interpersonal skill courses and participation in training activities administered as a part of the training.

(23) "Training program" means a course of instruction that meets educational objectives to ensure that minimum standards of competence are achieved.

(24) "Tribal agency" means an agency designated by the elected tribal governing body of a federally-recognized Wisconsin Indian tribe or band to administer AFDC, MA, food stamps and RNIP.

History: Cr. Register, January, 1991, No. 421, eff. 2-1-91.

HSS 217.03 Training requirements for income maintenance workers. (1) **IM WORKERS WHO BEGIN EMPLOYMENT ON OR AFTER FEBRUARY 1, 1991.** Each new worker shall complete the department's initial IM training program under s. HSS 217.04(1) and (2) or a county or tribal agency initial IM training program approved under s. HSS 217.04(4) during the first 6 months of employment. Until the initial training program is completed, the new IM worker may not make independent determinations or redeterminations of eligibility for income maintenance programs.

(2) **IM WORKERS EMPLOYED BEFORE FEBRUARY 1, 1991, AND OTHER EXPERIENCED IM WORKERS.** Each experienced IM worker shall complete ongoing training specific to income maintenance eligibility determinations and redeterminations each calendar year if the worker was an experienced IM worker for the entire year.

History: Cr. Register, January, 1991, No. 421, eff. 2-1-91.

HSS 217.04 Initial training. (1) **STANDARDIZED CURRICULUM.** The department shall develop a standardized curriculum for training new IM workers. The curriculum shall ensure that a minimum standard of competence is achieved if the training is completed. The curriculum shall include:

- (a) Policies and procedures set out in IM handbooks, manuals and instructional materials;
- (b) Interpersonal skills needed to perform IM functions;
- (c) CRN case processing and maintenance exercises in the classroom;
- (d) Manual case processing and maintenance exercises in the classroom;
- (e) Specialized case maintenance applications such as income budgeting, granting of medical assistance eligibility extensions and recovery of overpayments; and
- (f) On the job training techniques, including case processing and maintenance supervised by the county or tribal agency.

(2) **TRAINING AVAILABILITY.** The department shall make initial IM worker training available to new income maintenance workers directly or through regional training consortia.

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(3) **EVALUATION OF LEARNING.** The department shall develop a means of evaluating progress in learning, including instruments for review and measurement of the progress made and mastery of materials attained by trainees in an initial training program.

(4) **COMPARABLE COUNTY AGENCY OR TRIBAL AGENCY CURRICULUM AND TRAINING.**

(a) *Alternative curriculum.* A county or tribal agency may develop and make available for its IM workers its own training program. If it does, it may use the standardized curriculum under sub. (1) or develop its own curriculum. If it develops its own curriculum, that curriculum shall be comparable to the curriculum under sub. (1) and shall be approved by the department for comparability.

(b) *Training implementation plan.* A county or tribal agency that chooses not to participate in department training offered by department staff or through a regional training consortium shall develop a plan to implement either the standardized curriculum under sub. (1) or its own comparable curriculum approved by the department. The implementation plan, which shall include any proposed alternative curriculum, shall be submitted to the department for approval at least 45 days before the planned starting date of training, when it is first offered, and annually after that. The plan shall:

1. Specify the content and number of hours of classroom training and independent study, and planned exercises and tests;

2. State how IM handbooks, manuals and instructional materials will be used;

3. Explain how training will address the interpersonal skills needed to perform the IM function;

4. Specify the number of hours of supervised case processing, including the use of CRN and IM program policy updates;

5. Include an outline of all topics to be covered;

6. Indicate the length of the training program;

7. Describe how learning will be evaluated; and

8. Include the name, address, position title and qualifications of each trainer.

Note: Send the proposed alternative curriculum for initial IM training and the proposed initial IM training implementation plan to: Training Unit, Division of Economic Support, P.O. Box 7935, Madison, WI 53707-7935.

(5) **REPORTING AND DOCUMENTATION.** Each county agency and each tribal agency shall:

(a) Submit to the department by the first day of each month beginning April 1, 1991, a list of IM workers who are required to complete initial IM worker training; and

(b) Beginning in 1992, submit to the department by February 1 of each calendar year a report that documents training attended and completed by all new IM workers during the previous calendar year.

Note: Send the monthly list of IM workers who are required to complete initial IM worker training and the annual report on training to: Training Unit, Division of Economic Support, P.O. Box 7935, Madison, WI 53707-7935.

History: Cr. Register, January, 1991, No. 421, eff. 2-1-91.

HSS 217.05 Ongoing training. (1) IM POLICIES TRAINING. The department shall develop a refresher training course or courses for experienced IM workers covering specialized error-prone and difficult IM policies, and shall make the course or courses available each year directly or through regional training consortia to experienced income maintenance workers.

(2) INTERPERSONAL SKILLS TRAINING. The department shall develop a training course or courses in interpersonal skills related to income maintenance administration for experienced IM workers, and shall make this course or courses available each year directly or through regional training consortia to experienced income maintenance workers.

(3) COMPARABLE COUNTY AGENCY OR TRIBAL AGENCY ONGOING TRAINING. (a) Each county agency and each tribal agency shall either arrange for experienced income maintenance worker participation in departmental ongoing IM worker training delivered directly by department trainers or through regional training consortia as specified in subs. (1) and (2) or provide its own training, using either the department's training course or courses or its own comparable training course or courses. If it develops its own training course or courses, the training course or courses shall be comparable to those specified under subs. (1) and (2) and shall be approved by the department for comparability.

(b) A county or tribal agency that chooses not to participate in department training offered by department staff or through a regional training consortium shall develop a plan to implement either the training under subs. (1) and (2) or its own comparable training course or courses approved by the department under par. (a). The implementation plan shall be submitted to the department for approval at least 45 days before the planned starting date of training, when it is first offered, and annually after that. The plan shall:

1. Specify the content and number of hours of interpersonal skill training and refresher training covering specialized error-prone and difficult IM policies; and

2. Include the name, address, position title and qualifications of each trainer.

Note: Send a description of the proposed comparable ongoing IM training course or courses and the proposed ongoing IM training implementation plan to: Training Unit, Division of Economic Support, P.O. Box 7935, Madison, WI 53707-7935.

(4) REPORT ON TRAINING ATTENDED AND COMPLETED. Each county agency and each tribal agency shall, beginning in 1992, submit to the department by February 1 of each calendar year a report that documents training attended and completed by all experienced IM workers during the previous calendar year.

Note: Send the annual report on training to: Training Unit, Division of Economic Support, P.O. Box 7935, Madison, WI 53707-7935.

History: Cr. Register, January, 1991, No. 421, eff. 2-1-91.

Register, January, 1991, No. 421

HSS 217.06 Trainer qualifications. The department and each county or tribal agency with a department-approved initial or ongoing IM worker training program shall ensure that the person doing the training has:

(1) Knowledge of the income maintenance programs in which the person will conduct training as evidenced by prior experience with those income maintenance programs;

(2) Comprehensive knowledge of CRN case processing; and

(3) At least 12 hours of instruction in training techniques. Instruction in training techniques shall have been completed within the past 2 years or the person shall have functioned as an IM trainer within the 6 month period before accepting trainer responsibilities.

History: Cr. Register, January, 1991, No. 421, eff. 2-1-91.

HSS 217.07 Records. Each county and tribal agency shall include in the personnel file of each new IM worker and each experienced IM worker information needed to document successful completion of training, including the dates of training, trainer's name, number of hours of training, and location of, and attendance at, training and the actual training received.

History: Cr. Register, January, 1991, No. 421, eff. 2-1-91.