

Work Incentive Introductory Meeting Report

Personal information you provide may be used for secondary purposes [Privacy Law, s. 15.04 (1)(m), Wisconsin Statutes].

Report must be filled in completely prior to payment and submitted **within 5 days** of the end of service or previous month if service is continuing.

Report Month	Report Year (YYYY)
Consumer IRIS Number (9 Digits)	Service Provider Name (10-Character Abbreviation)
Consumer Name (As Listed on Purchase Order)	Service Authorization Date (MM/DD/YYYY)

Report Date	Report Author
Purchase Order (PO) Number	

Services must:

- Be conducted directly with the consumer via phone, virtually or face-to-face meeting
- Be responsive to the needs of the consumer
- Be conducted via consumer's preferred method of communication

Reporting must include:

- General Benefit Information
- Handouts shared and discussed with the consumer and details regarding the outcome of the discussion.
- Intake of the household
- Gather consumer demographic status relevant to benefits programs (living arrangements/housing, marital status, dependents, age, etc.)
- A general discussion of work incentives
- Signed releases of information
- Schedule portfolio meeting

Please copy and paste your report below this line. The report must cover at a minimum all the reporting requirements listed above prior to payment.
