

**From:** [Westly, Sara \(MDOR\)](#)  
**To:** [Moody, Kristine \(MDOR\)](#); [Gantzer, Michelle \(MDOR\)](#); [Ho, Lee \(MDOR\)](#); [Haugen, Alyssa \(MDOR\)](#); [Her, Yia \(MDOR\)](#); [Blomberg, Elizabeth \(MDOR\)](#); [Sullivan, Joseph \(MDOR\)](#); [Engen, Nikki \(MDOR\)](#); [Adkisson, Ann \(MDOR\)](#); [Moen, Emily \(MDOR\)](#); [Johnson, Lori \(MDOR\)](#); [Wakefield, Sally \(MDOR\)](#); [Fischer, Brian M \(MDOR\)](#); [Scharmer, Gretchen \(MDOR\)](#); [nfrey@mape.org](mailto:nfrey@mape.org); [Doty, Robert \(MDOR\)](#)  
**Cc:** [Kreiner, Joel \(MDOR\)](#); [Schmidt, Rachelle \(MDOR\)](#); [Westly, Sara \(MDOR\)](#)  
**Subject:** RE: MAPE Meet and Confer  
**Date:** Friday, February 19, 2021 5:40:27 PM  
**Attachments:** [M&C Talking Points 1.27.21 -QUAPI.docx](#)  
[image008.png](#)

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Good afternoon.

Thank you for bringing forward the Collections Quality Review: Identity Verification Review agenda item and providing the attached talking points.

I took this information into consideration and posted the following Division Announcement this afternoon:

### **What happened?**

In January 2020, the department rolled out an agency procedure for identity verification. We linked this procedure in the Collectapedia for verifying the identity of our customers.

In April 2020, the Collection Division started to incorporate this agency procedure in our quality evaluations. While completing evaluations over the next couple of months, the Quality Team identified concerns about collector performance pertaining to identity verification and shared them at the supervisor, leadworker, and coaching team meetings.

While units discussed this topic in staff meetings, and the division completed additional training, we recognize the issue remains unresolved based on the continuous reduction in the division average quality score and the questions asked during the POA Interdivisional Practical Application session, Identity Verification training, and January MAPE Meet and Confer meeting. We determined there is not a shared understanding of what it means to completely verify information, like the address or name, for both identity verification and demographic updates.

### **Why are identity verification and demographic updates Important?**

Identity verification is important to the department to ensure we:

- Do not disclose private or nonpublic information to an incorrect or unauthorized party
- Have current and complete demographic information to deliver correspondence to the appropriate party

By not gathering current and complete demographic information, we risk:

- Disclosing private and nonpublic information to the wrong customer
- Spending additional resources to work return mail work items

### **What actions are we taking?**

The Quality Team reviewed the evaluations on calls handled from April 2020 through January 2021. There were no zero-point evaluations for failing to verify a surname with hyphens or abbreviations.

However, there were a significant number of zero-point evaluations for using the customer's address as the additional identifier but not verifying the complete address. These evaluations spanned every production unit.

Due to the scope of this issue and the delay in the Leadership Team's response to ensure there was a shared understanding of identity verification, the Quality Team recommended we take action to provide equitable relief to those collectors impacted. We decided to allow the Quality Team to rescore these impacted phone calls and not score incomplete address verification as a zero-point evaluation. The calls must be rescored, not just deleted, to ensure all collectors received the same number of evaluations.

The Quality Team will adjust the impacted evaluations during the month of March 2021. Since the Quality Team's resources will be spent making these adjustments, they will not be completing ACD Representative Evaluations in March for calls handled in February. Supervisors will go back and correct the performance reviews for impacted employees after the evaluation is rescored.

Members of the Division-Wide Impact Team worked with other divisions to make changes to the department Identity Verification procedure to provide clarity and streamline conversations with customers. We will publish those changes and related Collectapedia updates this weekend. The Unit Leadership Teams will cover these changes in the next staff meetings.

The division training, department procedure updates, and related division procedure updates will ensure a shared understanding of verifying current and complete customer information for identity verification and demographic purposes. The Quality Team will resume reviewing phone calls in April, when they review the calls handled in March.

Thank you,

Sara

**Sara Westly, M.A.**

Director

Collection Division

Pronouns: She/Her

**Minnesota Department of Revenue**

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**From:** Moody, Kristine (MDOR) <kristine.moody@state.mn.us>

**Sent:** Wednesday, January 27, 2021 10:34 AM

**To:** Gantzer, Michelle (MDOR) <Michelle.Gantzer@state.mn.us>; Ho, Lee (MDOR) <lee.ho@state.mn.us>; Haugen, Alyssa (MDOR) <alyssa.haugen@state.mn.us>; Her, Yia (MDOR) <Yia.Her@state.mn.us>; Blomberg, Elizabeth (MDOR) <Elizabeth.Blomberg@state.mn.us>; Westly, Sara (MDOR) <sara.westly@state.mn.us>; Sullivan, Joseph (MDOR) <joseph.sullivan@state.mn.us>; Engen, Nikki (MDOR) <nikki.engen@state.mn.us>; Adkisson, Ann (MDOR) <ann.adkisson@state.mn.us>; Moen, Emily (MDOR) <emily.moen@state.mn.us>; Johnson, Lori (MDOR) <lori.johnson@state.mn.us>; Wakefield, Sally (MDOR) <sally.wakefield@state.mn.us>; Fischer, Brian M (MDOR) <brian.m.fischer@state.mn.us>; Scharmer, Gretchen (MDOR) <gretchen.scharmer@state.mn.us>; nfrey@mape.org; Doty, Robert (MDOR) <Robert.Doty@state.mn.us>

**Cc:** Kreiner, Joel (MDOR) <joel.kreiner@state.mn.us>; Schmidt, Rachelle (MDOR) <Rachelle.Schmidt@state.mn.us>

**Subject:** RE: MAPE Meet and Confer

Good morning,  
Here is our agenda.

Thank you,

*Kristine Moody.*

Meet and confer Chair



-----Original Appointment-----

**From:** Gantzer, Michelle (MDOR) <Michelle.Gantzer@state.mn.us>

**Sent:** Wednesday, December 16, 2020 11:37 AM

**To:** Gantzer, Michelle (MDOR); Ho, Lee (MDOR); Haugen, Alyssa (MDOR); Her, Yia (MDOR); Blomberg, Elizabeth (MDOR); Westly, Sara (MDOR); Moody, Kristine (MDOR); Sullivan, Joseph (MDOR); Engen, Nikki (MDOR); Adkisson, Ann (MDOR); Moen, Emily (MDOR); Johnson, Lori (MDOR); Wakefield, Sally (MDOR); Fischer, Brian M (MDOR); Scharmer, Gretchen (MDOR); nfrey@mape.org; Doty, Robert (MDOR)

**Cc:** Kreiner, Joel (MDOR); Schmidt, Rachelle (MDOR)

**Subject:** MAPE Meet and Confer

**When:** Wednesday, January 27, 2021 10:30 AM-11:30 AM (UTC-06:00) Central Time (US & Canada).

**Where:** Microsoft Teams Meeting

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