WEATHERIZATION TRAINING PLAN

Weatherization Program Management Module



Preparing Michigan Agencies for a Successful Launch

As agencies transition into the new Weatherization Program Management Module, a statewide training curriculum will ensure every role—leadership, finance, intake staff, auditors, modelers, and QCIs—is fully prepared for soft launch, hard launch, and ongoing operations. Training covers the entire life cycle of Weatherization job management and provides hands-on experience with dashboards, WAweb connections, reporting tools, and the Michigan Weatherization Program Management Guidebook.

Weatherization Program Management Module Training Schedule

Training	Details	Date	Type	Start Time	End Time
Job Sequence and stages	Intake to Closeout Refresher	10/06/2026	Virtual	8:30 AM	12:30 PM
Job Sequence and Stages	Managers and Modelers Refresher	10/08/2026	Virtual	8:30 AM	12:30 PM
Enrolling and Transitioning through Statuses	-	10/21/2026	Virtual	1:00 PM	2:00 PM
Work Orders and WAweb	Connections Refresher	10/28/2026	Virtual	1:00 PM	2:00 PM
Creating Orrick Work Orders	-	10/29/2026	Virtual	9:00 AM	10:00 AM
Creating Orrick Work Orders	-	11/17/2026	Virtual	1:00 PM	2:00 PM
Enrolling and Transitioning through Statuses	-	11/18/2026	Virtual	9:00 AM	10:00 AM
Dashboards & Reporting	-	11/24/2026	Virtual	11:00 AM	12:00 noon
Ensuring Proper Job Closeout	-	12/09/2026	Virtual	1:00 PM	2:00 PM
Ensuring Proper Job Closeout	-	01/20/2027	Virtual	1:00 PM	2:00 PM
Dashboards & Reporting	-	01/21/2027	Virtual	11:00 AM	12:00 noon
Compass Deadline Assessment	-	02/03/2027	Virtual	9:00 AM	10 AM
Ensuring Proper Job Closeout	-	02/24/2027	Virtual	1:00 PM	2:00 PM
Compass Job Transition	-	03/03/2027	Virtual	9:00 AM	10 AM
Dashboards & Reporting	-	03/16/2027	Virtual	11:00 AM	12:00 noon

Training Track Descriptions:

Ensuring Proper Job Closeout

Learn the closeout process in the new Weatherization module (Orrick), including using the advanced reports to confirm jobs are reported accurately.
Audience: Managers

Ensuring Proper Job Closeout	November 18, 2026	Virtual	1-2
Ensuring Proper Job Closeout	December 9, 2026	Virtual	1-2
Ensuring Proper Job Closeout	January 20, 2027	Virtual	1-2
Ensuring Proper Job Closeout	February 24, 2027	Virtual	1-2

Enrolling and Transitioning through Statuses

This training will show you the required statuses to complete once you have enrolled the applicant into the Weatherization Assistance Program. We will review all required fields to successfully move your client from start to finish.
Audience: All

Enrolling and Transitioning through Statuses	October 21, 2026	Virtual	1-2

Job Sequence and stages: Intake to Closeout Refresher

Audience: Intake Staff, Managers, Modelers, Auditors, QCIs

Job Sequence and stages	October 6, 2026	Virtual	8:30-12:30

Job Sequence and Stages for Managers and Modelers Refresher

Audience: Intake Staff, Managers, Modelers, Auditors, QCIs

Job Sequence and stages	October 6, 2026	Virtual	8:30-12:30

Work Orders and WAweb Connections Refresher

Build and manage work orders and transition smoothly from Compass.
Audience: Managers, Modelers, Auditors, QCIs

Work Orders and WAweb Connections Refresher	October 28, 2026	Virtual	8:30-12:30

Creating Orrick Work Orders

Session covers the different ways to create work orders in the new Orrick system. We will also demonstrate the required information in the work orders tied to reporting.
Audience: Managers and Modelers

Creating Orrick Work Orders	October 29, 2026	Virtual	9-10
Creating Orrick Work Orders	November 17, 2026	Virtual	1-2

Dashboards & Reporting

This session introduces participants to the dashboards and reporting tools used to oversee all Weatherization activities. Participants will learn how to monitor job status, identify bottlenecks, review performance indicators, and locate required data for state compliance. The goal is to equip staff with the ability to make data-driven decisions and efficiently track agency operations in one unified system.
Audience: Managers and Modelers

Dashboards & Reporting	November 24, 2026	Virtual	11-12
Dashboards & Reporting	January 21, 2027	Virtual	11-12
Dashboards & Reporting	March 16, 2027	Virtual	11-12

Compass Deadline Assessment

Assessing if a job will make the Compass closeout deadline
Audience: Managers

Compass Deadline Assessment	February 3, 2027	Virtual	9-10

Compass Job Transition

Process for transitioning jobs that won't be closed out by 3/31 that are on the compass
Audience: Managers

Compass Job Transition	March 3, 2027	Virtual	9-10

Past Trainings:

All recordings are located on the LMS site

Weatherization Program Management Module Kick-Off Meeting

Kick off the training with Maddy and Keith
Audience: All

Module Kick-Off Meeting
System Admin Rollout Kick-Off Meeting

Job Management: Job Sequence & Stages

Learn the complete job lifecycle from intake to close-out.
Focus: Job stages, workflow alignment, documentation, status updates
Audience: Managers, Modelers, Auditors, QCIs

Job Sequence & Stages for Managers and Modelers
Project Processing for Auditors and Modelers
Project Completion for QCIs
Job Management Scenarios for all

Weatherization Program Management Guidebook

Learn the roles and responsibilities, and job management, and stages of a job.
Focus: Roles, permissions, workflows, requirements, daily operational use
Audience: Leadership, Finance, Managers, Modelers, Auditors, QCIs

Overview
Overview (duplicate class)
Overview for Auditors and Modelers

Work Orders & WAweb Connections

Build and manage work orders and transition smoothly from Compass.
Focus: Work order creation, uploads, WAweb syncing, funding by measure
Audience: Managers, Modelers, Auditors, QCIs

Managers, EAs, and Modelers
Managers, EAs, and Modelers (duplicate class)
Uploading WAweb Docs & Managing Measures

Intake & Close-Out: Data Entry and Key Requirements

Ensure accurate data entry, intake documentation, and close-out compliance.
Focus: Eligibility verification, priority points, required fields, reporting requirements
Audience: Intake Staff, Managers, Modelers, Auditors, QCIs

Intake to Close-Out for Managers and Modelers
Intake Basics
Intake Accuracy
Application Completion Procedures

Supporting Features in Job Management and the Dashboard

Manage contractor records, certifications, expirations, and alerts.
Focus: Contractor oversight, tracking, integration with job flow
Audience: Managers, Intake Staff, Modelers, Auditors, QCIs

Managing Contractor Basic Information
Uploads and Alerts for Intake Staff

Weatherization Program Management Module: Preparing for the Hard Launch (10/1/26)

Work with MiTEC to ensure that your agency is ready for new empowOR Weatherization Program Management Module starting 10/1/26. The following sessions will help agencies learn how to make sure jobs are ready to be used in the new system by the hard launch day.
Audience: Weatherization Managers

Preparing for the Hard Launch

MiTEC staff are available to assist you with requesting an LMS account. Simply click on the "New LMS Registration" button to complete your application.



Sign up for classes now at MiTEC - **michigantec.org**

Our Service Desk is ready to support you. Please email all questions, comments, and error reports to

MDHHS-empowORHelp@michigan.gov