

New Conference Consult Feature

Release Date: 5/29/2026

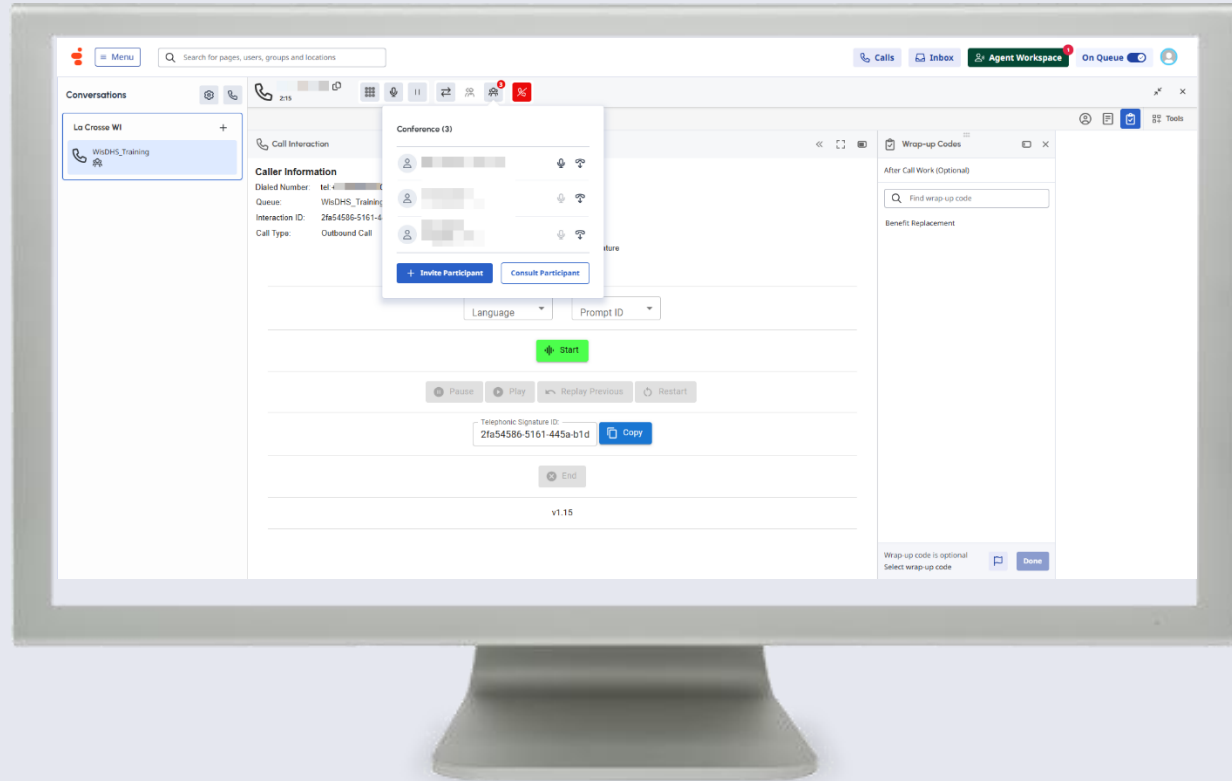


WISCONSIN DEPARTMENT
of HEALTH SERVICES

Introduction

As of May 22, 2026 agents have the ability “warm-invite” additional participants to an existing conference.

This allows the agent to bring an additional party to an existing conference, but provide context for the conference before the additional party is joined. Agents should begin seeing this functionality when they log in on Friday, May 22, 2026.



Background

Previously, any additional parties brought into an existing conference were brought in without any opportunity to consult with the additional participant prior to joining the conference.

Example Scenario

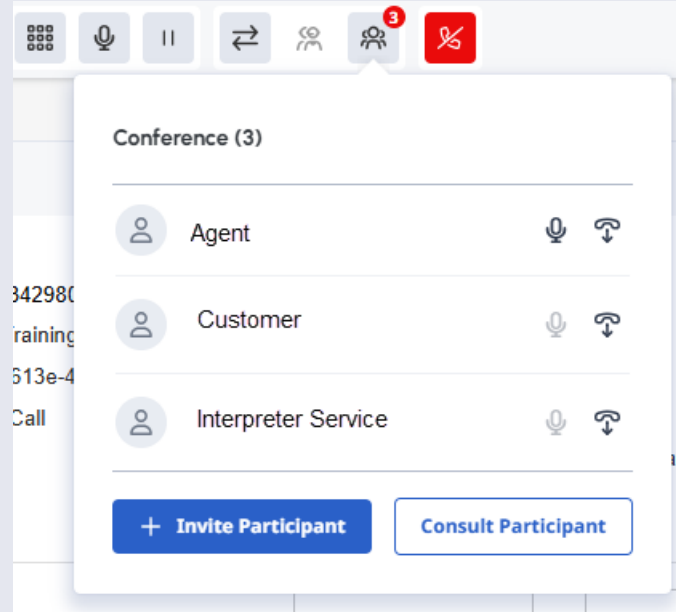
Agent is on a call with a member that requires a translator. As a result, the call has an existing conference of the agent, member and translator.

During the call, the agent would like to conference in a supervisor to assist but would like to speak with the supervisor before bringing them into the conference. The agent would complete a consult with the supervisor and, after providing context, merge the supervisor into the conference.

Process

Begin with an existing conference

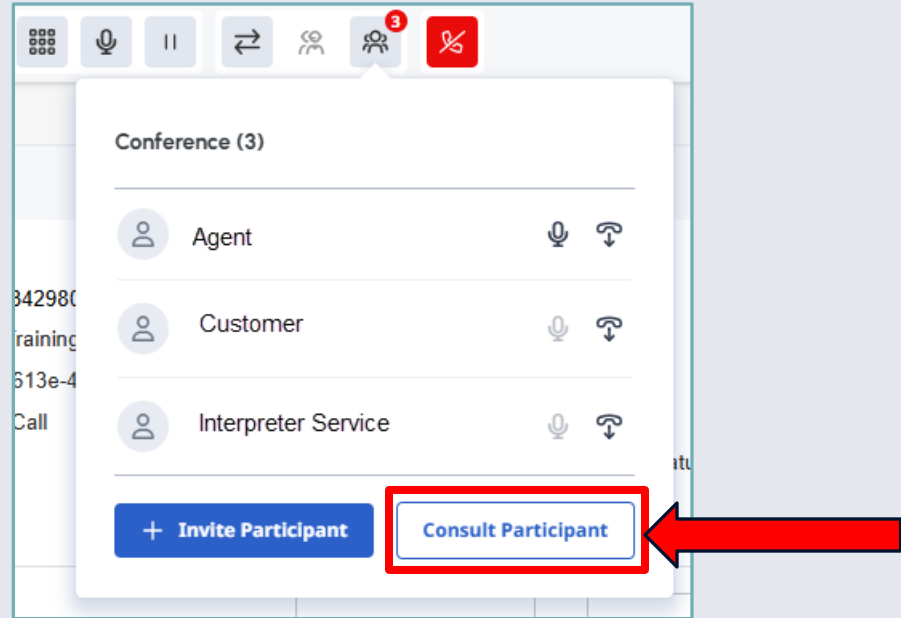
In this example we have the agent, customer and interpreter service in a conference.




Process

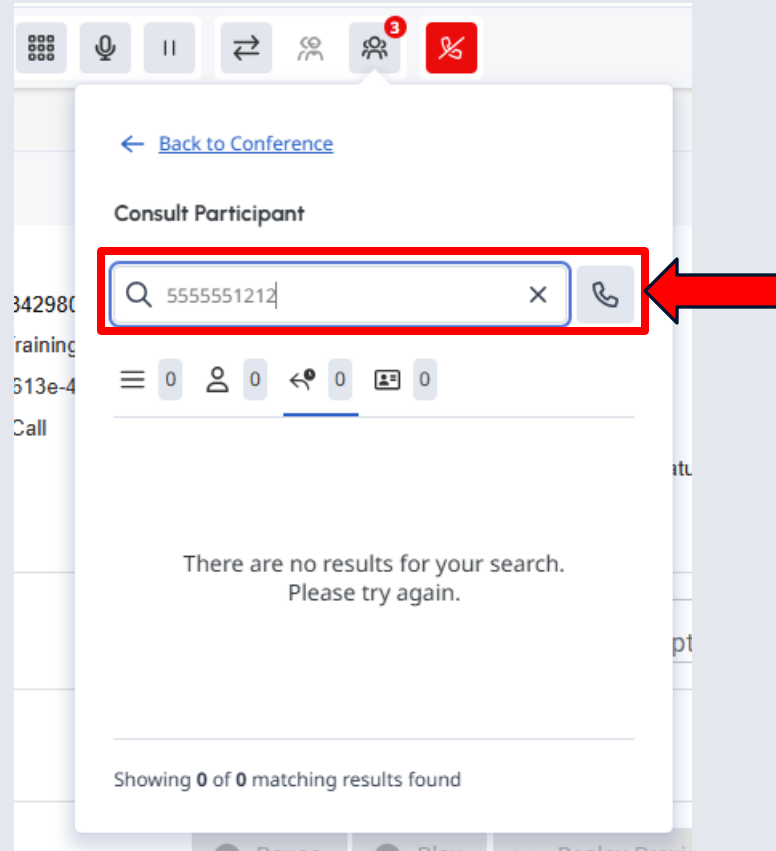
After speaking with the customer, the agent determines a supervisor would be helpful on the call. First, the agent would like to provide the supervisor with some context for the call.

The agent will first click “Consult Participant”



Process

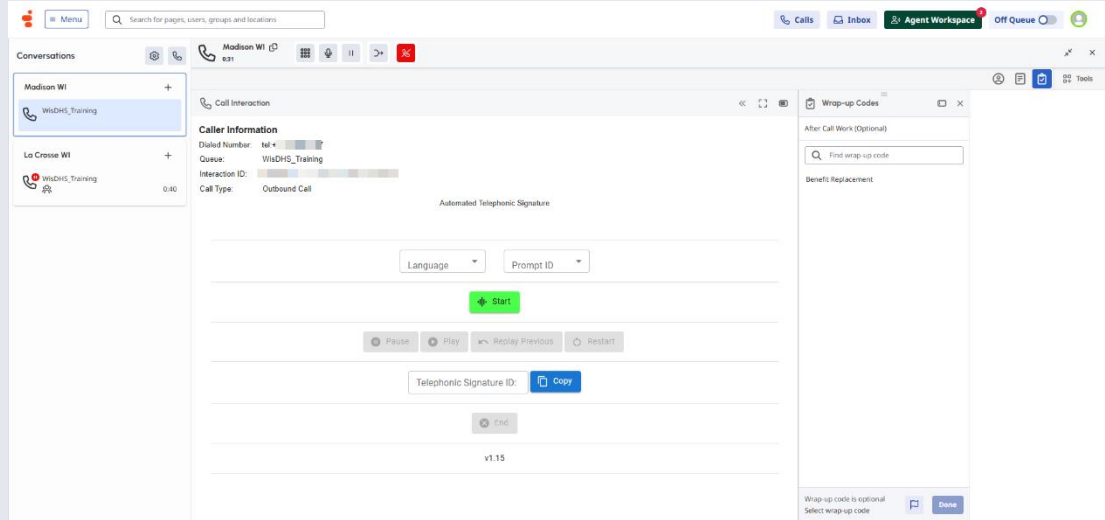
Enter the phone number, agent name or queue name and click the "Consult participant" button 




Process

A new interaction will be created. At this time, the agent may discuss the call with the supervisor before joining all parties together.


The parties in the existing conference will remain in the conference, able to talk to other, but they will not hear the agent and supervisor discussing the call

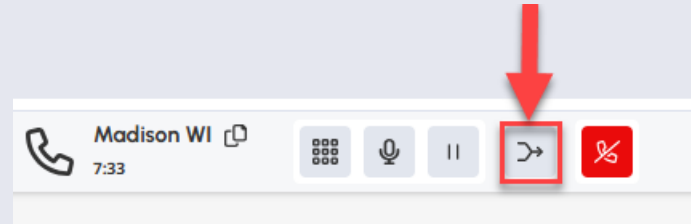


Process


To bring the supervisor into the conference, click the “Merge Calls” button. 

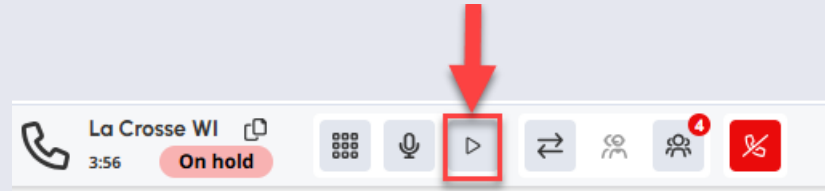
Click done on the new interaction.

If the agent does not wish to bring the supervisor into the conference, click the “End Call” button 



Process

The agent must next remove themselves from hold by clicking on the “Resume” button  to rejoin the conference.



Additional Handbook Resources

- Creating a conference:

<https://www.emhandbooks.wisconsin.gov/cca/genesys.htm#t=Policy%20Pages%2F4.5.htm>