

CWW Documents on the Dashboard

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Income Maintenance Advisory Committee (IMAC) Meeting



Overview

Outcomes and Goals

- Enhance the CWW dashboard to add unprocessed documents. Provide accurate counts of documents currently waiting for processing, including metadata for each document which may include: document type, due date, number of pages.
 - Ability to assign the work from the CWW dashboard.
 - Allows for more efficient assignment of casework without affecting the caseload assignment.

Background

As part of goals, the Income Maintenance Operational Analysis (IMOA) subcommittee continues to identify and prioritize areas of need within CARES and CARES Worker Web (CWW). One of the needs identified by the IMOA subcommittee is to efficiently assign and monitor work items at a more micro level than is currently available.

Monitoring and assigning specific elements of work (documents, changes, alerts, etc) to individual workers without affecting the case level assignment presents a challenge. Additionally, tracking work completed at the worker level is not available as part of the current CARES reporting. In most cases, these functions are being accomplished outside of CARES at this time or other, more cumbersome, processes.

As a result of input from the consortia and Miles, DHS developed the ability to better track and assign unprocessed documents via “Documents on the Dashboard”.

Policy Changes

There are no policy changes associated with this project.

System Changes

Documents on the Dashboard

Documents on the Dashboard

A new Work Item Category, “Documents”, will be added to the CWW Workload Dashboard.

- Will allow users to assign, track, and manage unprocessed case documents from initiation to completion.
- The number and status of document assignments as well as the document type, due date, and number of pages will be displayed.
- The CWW dashboard will organize the display of unprocessed document work items by the number of days remaining to complete. Users can click an unprocessed document work item link to navigate to the Work Item Search page.

Documents on the Dashboard

Document Work Item Due Dates

- All dashboard workload items are required to have a due date for display on the dashboard.
- Since a policy driven due date would vary, or possibly be nonexistent, depending upon the document, a fixed due date will be assigned for each consortium and MILES.
- All documents added to the workload dashboard after March 3rd are automatically due 10 calendar days after the received date. This due date is not intended for monitoring timely document processing. It may be used to monitor the age of unprocessed documents.
- Documents that are added to the workload dashboard in the March 03, 2018 conversion will have a workload dashboard due date of March 15, 2018.

Documents on the Dashboard

Document Conversion

- As part of a separate technology enhancement, group document assignments are being eliminated. Any document routing rule currently routing to a group will be need to be updated to route to a team ID or worker ID.
- A one-time conversion will be performed on March 03, 2018 to add document assignments to the Workload Dashboard.
- Unprocessed documents assigned to a group and received between December 01, 2017 and March 02, 2018 and linked to a case will be automatically added to the Workload Dashboard. All converted documents will be assigned to either a worker ID or team ID, selected by the consortium, prior to conversion.
- Unprocessed documents received prior to Dec 01, 2017 will need to be manually assigned.

Documents on the Dashboard

Worker Dashboard

The screenshot shows the CARES Worker Web Home interface. At the top, there is a navigation menu on the left and a header with user information and a 'Quick Select' dropdown. The main content area is titled 'CARE'S Worker Web Home' and features a 'Recent Cases/RFA/ACCESS Applications/Change Reports/PNs' table. Below this is a 'My Dashboard' section with a 'View Workload Dashboard' button. The dashboard table shows work items categorized by 'Days Left To Complete'.

Category	Total	Days Left To Complete				
		<1	1-7	8-14	15-30	>30
Applications	13	13				
Renewals / Reviews	1	1				
SMRFs	0					
Potential Errors	0					
Discrepancies	0					
Documents	3			3		
Received	3			3		
Self-Employment Income (SEI)	2			2		
Unknown Document (UN)	1			1		

A count of document work items will be displayed in the dashboard.

The worker will be able to drill down to document type

Documents on the Dashboard

Consortium Dashboard

Work Item Dashboard for 01/18/2018 - 01/18/2018						
Work Item Category	Total	Days Left to Complete				
		<5	5-7	8-14	15-30	>30
Applications	37739	36706	343	349	327	45
Renewals / Reviews	2819	2763	2	29	2	23
SNOP's	17	4		13		
Potential Errors	343	329	3	1	2	
Discrepancies	1062	1062				
<input checked="" type="checkbox"/> Documents	298	196	24	15	63	
<input checked="" type="checkbox"/> Received	281	183	21	15	62	
Asset Information - Other (AST)	2		2			
Bank Accounts (BNK)	11	8	1		2	
Child Care Expense (CCE)	1	1				
Change Reporting Form (CHG)	2	2				
CIP/COP Info (CIP)	2	1			1	
Child Support (CS)	3	3				
Child Support Expense (CSE)	5	2			3	
Child Welfare (CW)	2	1			1	
Declining Aid Forms (DAF)	3				3	
Death Certificate (DC)	2				2	
DDB Related Information (DDB)	9	7			2	
Document Tracking Sheet (DTS)	2				2	
Electronic Benefit Transfer (EBT)	16	13			3	
Earned Income (EI)	43	39		3	1	
Estate Recovery Prog. Disclosure Forms (2				2	
EVF-E Form (EVFE)	7	4			3	
FSET Employment Plan (FSEP)	4	4				
FSET Employment Plan Unsigned (FSEU)	2	2				

Documents on the Dashboard

Work Item Search Page

The screenshot shows the CARES Worker Web interface. The top navigation bar includes the user ID, name, and quick select dropdown (set to CASERFA). The left sidebar contains a navigation menu with options like Search, Search, Inbox Search, Unlinked Documents, RFA/Case, Client Registration, Case Summary, Case Comments, Expected Changes, Application Entry, Generate Summary, Instate Eligibility Determination, Eligibility, Post Eligibility, Potential Error Listing, Confirm Eligibility, Refer to FSET, FS Clock, Override AG Renewal / Review Dates, W-2 Post Eligibility, Post Confirmation, Query, ES Benefit Issuance, and Worker Tools. The main content area is titled 'Work Item Search' and contains a search criteria form. The form is divided into several sections: 'Criteria' with radio buttons for search methods; 'Additional Search Criteria' with dropdowns for Category (Document), Status (SELECT ALL, Received, Waiting), Type (SELECT ALL, APSCH, CAF, AST, APPN), Special Attention (LTC), Due Date (Any, date pickers), Received Date (Any, date pickers), Completion Status (Not Completed), Completed / Withdrawn Between (date pickers), Work Item Flag (checkboxes for No Flag, Escalated Flag, Other AG Pending Case is Correct Flag, Reviewed Flag, System Error Reported Flag, VCL Issued Manually Flag, and Withdraw Requested Flag), and Has related documents? (dropdown). The bottom section, 'What would you like to do?', has radio buttons for 'View and Select Work Items meeting the above criteria', 'View and Select to Reassign Work Items meeting the above criteria', and 'Display Counts of Work Items meeting the above Criteria'.

The option to select “Document” will be added to the Category drop-down menu in the "Additional Search Criteria" section of the Work Item Search page. This will allow users to search for documents by the following criteria:

- Status
- Document Type
- Special Attention
- Due Date
- Received Date
- Completion Status
- Completion or Withdrawal date
- Work Item Flag

Important Dates

TAPP Demonstration: **February 9, 2018**

Operations Memo Release: **February 15, 2018**

Training Release: **March 1, 2018**

CWW Documents on the Dashboard

Questions?

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