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TO: **Income Maintenance Supervisors**
Income Maintenance Lead Workers
Income Maintenance Staff
W-2 Agencies
Workforce Development Boards
Job Center Leads and Managers
Training Staff
Child Care Coordinators

FROM: Shawn Smith, Director
Bureau of Enrollment Policy & Systems
Division of Health Care Access and Accountability

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Bureau of Working Families
Division of Family and Economic Security

BEPS/DFES OPERATIONS MEMO

No: 12-57

DATE: 11/6/2012

FS ☒	**MA** ☒	**BC+** ☒
SC ☒	**CTS** ☒	**FSET** ☒
BC+ Basic ☒	**BC+ CORE** ☒	
CC ☒	**W-2** ☒	**EA** ☐
CF ☐	**JAL** ☐	**JC** ☐
RAP ☐	**WIA** ☐	**Other** ☐* **EP**

SUBJECT: Client Scheduling Move from CARES to CWW

CROSS REFERENCE: Process Help Chapter 1.8; Ops Memo 12-41, Team Management;

- **Please Note:** Ops Memo 12-40, Client Scheduling Move from CARES to CARES Worker Web (CWW) is now obsolete with the publishing of this memo.

EFFECTIVE DATE: November 12th, 2012

PURPOSE:

This memo describes the implementation of the Client Scheduling (CS) project. The Client Scheduling project will move the client scheduling functions for appointment scheduling and calendar management from the CARES Mainframe to CARES Worker Web (CWW).

BACKGROUND:

Since January 2012, the Income Maintenance (IM) programs have been administered by the IM Consortia, MilES and Tribal IM agencies.

In both IM and W-2 agencies, client scheduling has become increasingly essential to the creation and maintenance of staff schedules and for management of customer appointments. With the implementation of Client Scheduling into CWW, agencies will have more accessibility to schedules and appointments within each agency, IM Consortia, W-2 agencies and teams/groups of workers.

IMPLEMENTATION/TRANSITION:

Client Scheduling functions will be moved to CWW over the weekend of November 9th. The system will be available to workers on November 12th. Most appointments scheduled on or after November 9th, and standard days and slots assigned in the future will automatically transition from the mainframe to the new CWW system. Please see page 24, Communication Reminders, for a list of actions workers will have to take in order for their scheduled appointments and standard days to transition to the new system. Workers will continue to have query access to certain screens in the mainframe Client Scheduling subsystem.

The table below displays the mainframe screens that will become disabled or have query access after implementation.

SCREEN/DESCRIPTION	AFTER IMPLEMENTATION
CSAA – List Available Appointments	No access
CSAS – Schedule Individuals/Appointment Scheduler	No access
CSCR – Client Registration Waiting List	Read only access for 3 months.
CSDS – Maintain Daily Schedules	Read only access for 3 months.
CSHS – View Scheduling History	Read only access for 3 months.
CSMS – Maintain Monthly Schedules	Read only access for 3 months.
CSNM - Appointment Name Match	Read only access for 3 months.
CSNX – RRU Waiting List	Read access for 3 months.
CSRD – RRU Standard Days	Read access for 3 months.
CSRL – Receptionist Waiting List	Read access for 3 months.
CSRM – Maintain Monthly Schedules RRU	Read access for 3 months.
CSRR – Round Robin Unit Appointment List	Read access for 3 months.
CSRS – Receptionist Check-In	No access
CSSD – Worker Standard Days	Read access for 3 months.
CSSL – Standard Day Listing	Read access for 3 months.
CSUM – Round Robin Unit Maintenance	Read access for 3 months.
CSWD – View Service Site Waiting List	Read access for 3 months.
CSWL – Worker Waiting List	Read access for 3 months.
CSWR – Schedule Groups for Work Program	No access
CSWP – Request WP – Scheduling Information	No access

ACTIVITY TYPES/CODES:

The activity codes in Client Scheduling are categorized as depicted in the following tables. Please note that there are some new codes (indicated in a **bold font**) that have been added. (Process Help Chapter 1.8.9.6 contains more detailed information on how to use these activity codes).

CASE/RFA ACTIVITY TYPES:

Please note that up to 2 appointments can be created for a slot of this type.

CODE	DESCRIPTION
EH	Eligibility Review/Home
EO	Eligibility Review/Office
F1	Postponed FS Interview/Phone
F2	Postponed FS Interview/No Phone
IF	ES Intake Interview/Office
IN	**Intake/No Phone**
IO	ES Intake Interview/Home
IP	ES Intake Interview/Phone
IR	ES Intake Interview/2nd
MP	ES Intake Interview/2nd Phone
MR	ES Eligibility Review/Mail-In
PF	Priority Services/FS
PO	Priority Services/Other
RN	**Renewal/No Phone**
RP	ES Eligibility Review/Phone
RS	**Resource Specialist Appointment**

Protected Activity Types:

No appointments can be created for the following slots:

CODE	DESCRIPTION
BR	Break
HP	Personal Holiday
IL	Sick Leave
JD	Jury Duty
LN	Lunch
MT	Meeting
OT	Out of the Office
PH	Phone Contact
PT	Protected Time
ST	Staff Meeting
VA	Vacation

Other:

Up to 2 appointments can be created for an “FH” or “VS” slot. The WK activity type will be used to track walk-in entries and is not applicable for appointments.

CODE	DESCRIPTION
FH	Fair Hearing
VS	Visitor
WK	**Walk-in**

PIN INDIVIDUAL & PIN GROUP:

Currently in the mainframe, all PIN activity codes can be used with both individual and group appointments. Within Client Scheduling, PIN activity types will be categorized into “PIN Individual” and “PIN Group” activity codes. PIN Individual codes should be used to schedule appointments with an individual. PIN Group codes should be used to schedule appointments with groups.

Up to 2 appointments can be created for a PIN Individual slot and up to 200 appointments can be created for a PIN Group slot.

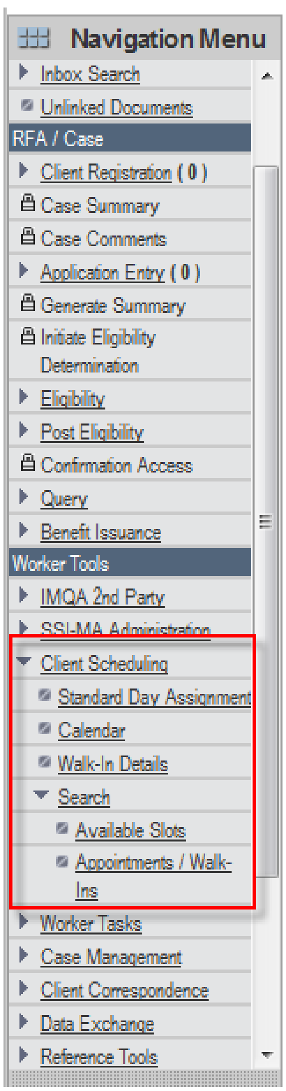
EXISTING CODE	PIN INDIVIDUAL ACTIVITY TYPE	PIN GROUP ACTIVITY TYPE
AS – Assessment	AS – Assessment (Individual)	N/A
CO – Counseling	CO – Counseling (Individual)	N/A
PR – Periodic Review	PR – Periodic Review (Individual)	N/A
WI – Work Search Individual	WI – Work Search Individual	N/A
E1 – Enrollment – Initial	E1 – Enrollment – Initial (Individual)	**G1 – Enrollment – Initial (Group)**
E2 – Enrollment – 2nd	E2 – Enrollment – 2nd (Individual)	**G2 – Enrollment – 2nd (Group)**
MO – Job Readiness/Motivation	MO – Job Readiness/Motivation (Individual)	**GO – Job Readiness/Motivation (Group)**
WR – Work Search Review	WR – Work Search Review (Individual)	**GS - Work Search Review (Group)**
GW – General WP Appt	**IW – General WP Appt (Individual)**	GW – General WP Appt (Group)
GR – Group Wk Search/Special Wkshp	N/A	GR – Group Wk Search/Special Wkshp
JC - Work Search/Job Club	N/A	JC - Work Search/Job Club (Group)
	EP – Mandatory Employability Plan Review (Individual)	N/A

<u>THE FOLLOWING ACTIVITY TYPES WILL BE OBSOLETE WITH CLIENT SCHEDULING:</u>

REMINDER: *Any standard days, slots and appointments created with these activity types* ***will not*** *convert over to CWW. Refer to the section on "Communication Reminders" (pg. 26 of the memo) for more information.*

CODE	DESCRIPTION
EI	ESC Intake Interview
ER	ESC Review Interview
CS	Client Reg/Scheduled
CW	Client Reg/Walk In
GE	ES/General
GC	Generic Activity
L1	LF Case Mgmnt/Enroll-Initial
L2	LF Case Mgmnt/Enroll-Final
FF	Reconciliation/Fact Finding
TR	Training Review

CARES:



Currently, the ability to create and maintain a staff schedule, as well as manage customer appointments is within the CARES Mainframe system. With the implementation of Client Scheduling in CWW, Client Scheduling in the CARES Mainframe will be limited to query only.

More detailed instructions on using the new Client Scheduling system will be available, prior to implementation in Process Help, Chapter 1.8.

A "Client Scheduling" link will be added to the CWW Navigation Menu under the Worker Tools heading.

There are nine new CWW pages within Client Scheduling. Pages with an asterisk (*) can be accessed directly from the Navigation Menu.

1. Standard Day Assignment*
2. Standard Day Details
3. Calendar*
4. Appointment Details
5. Walk-In Details*
6. Available Slots Search Criteria*
7. Available Slots Search Results
8. Appointments / Walk-ins Search Criteria*
9. Appointments / Walk-ins Search Results

STANDARD DAY ASSIGNMENT PAGE:

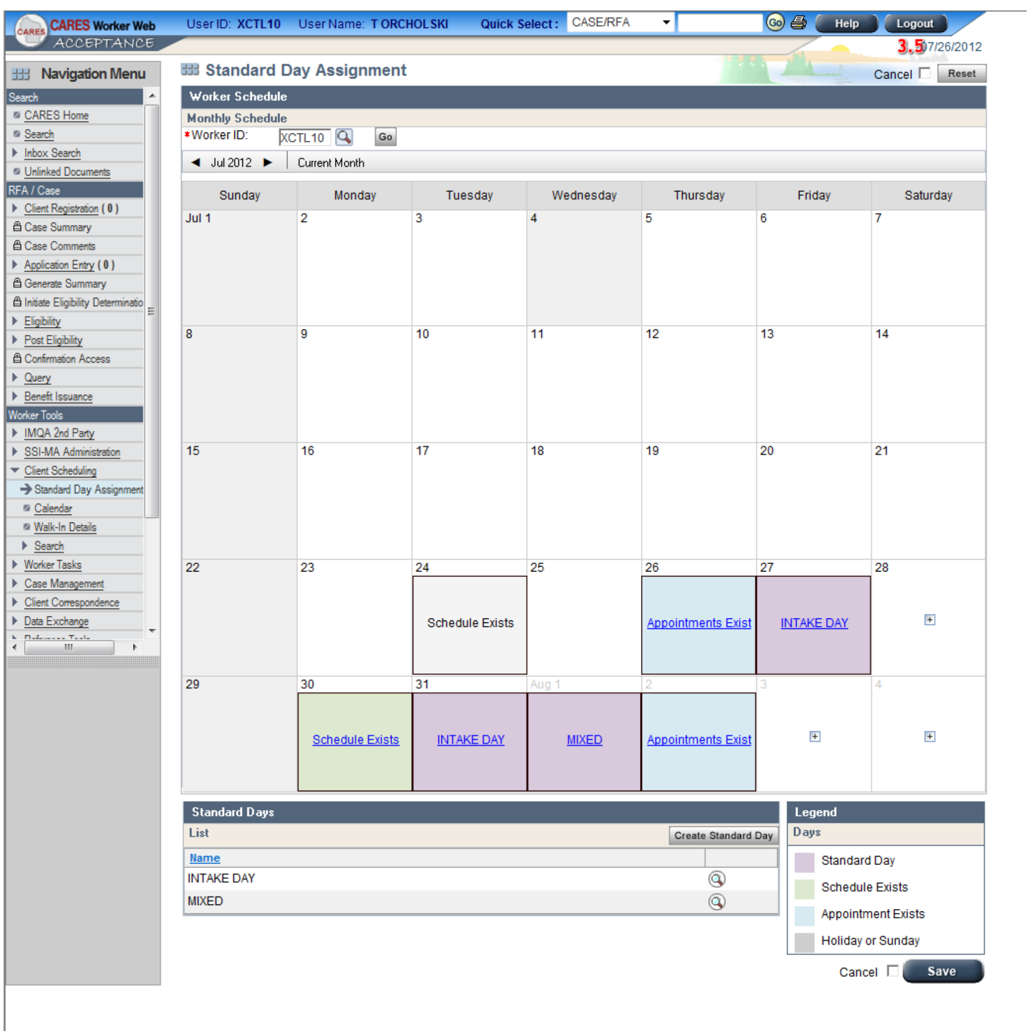
The Standard Day Assignment page can be accessed from the navigation menu and can be used by workers to complete the following tasks:

- Apply a previously created standard day to a particular day of the month
- View their monthly schedule
- Click through to the "Standard Day Details" page to take any of the following actions:
    - Create a standard day
    - Modify a standard day
    - Delete a standard day
    - Copy a standard day between workers

Page Features:

- The list of Standard days created by a worker and their monthly schedule are all on one page
- Color coding and quick view titles allow for a quick-glance understanding of the monthly schedule.
- Quick access to view another worker's standard day assignment by entering the worker ID and clicking 'Go'

Workers will be able to create a monthly schedule up to six months in the future.



STANDARD DAY DETAILS PAGE:

Workers can access the Standard Details page (see pages 9 and 10) from the Standard Day Assignment page by clicking the Create a Standard Day button or the magnifying glass of the standard day already created.

This page allows workers to set up a recurring schedule using Standard Days that they can apply on the 'Standard Day Assignment' page. The Standard Day schedule will then be replicated on the Calendar page. The Standard Day Details page allows workers to create, view, modify, delete or copy a standard day to another worker.

Page Features:

- The page is color-coded and shows a legend for quick-glance referencing

  CASE/RFA Based
  Pin Based
  Protected
  Other

- Activity Types per Slot:

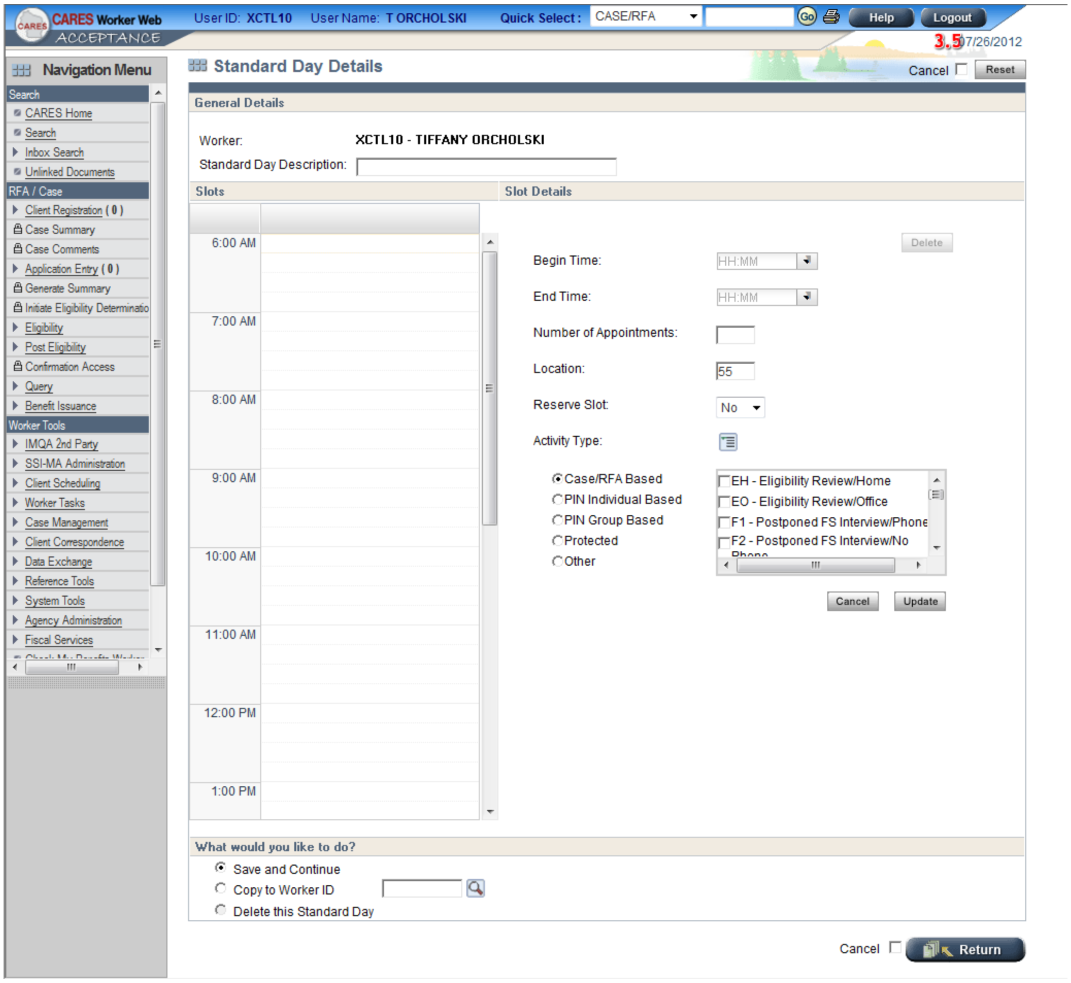
  Slots on this page can be created with more than 1 activity code if the worker is flexible with the type of appointments s/he is willing to accept at a particular time. (Please note that this is not applicable for PIN Group slots which will continue to be set up with a maximum of 1 activity type per slot). For Case/RFA/Other type slots and PIN Individual based slots, workers can indicate that they will accept up to 4 activity code types for a slot.

- Number of Appointments per Slot:

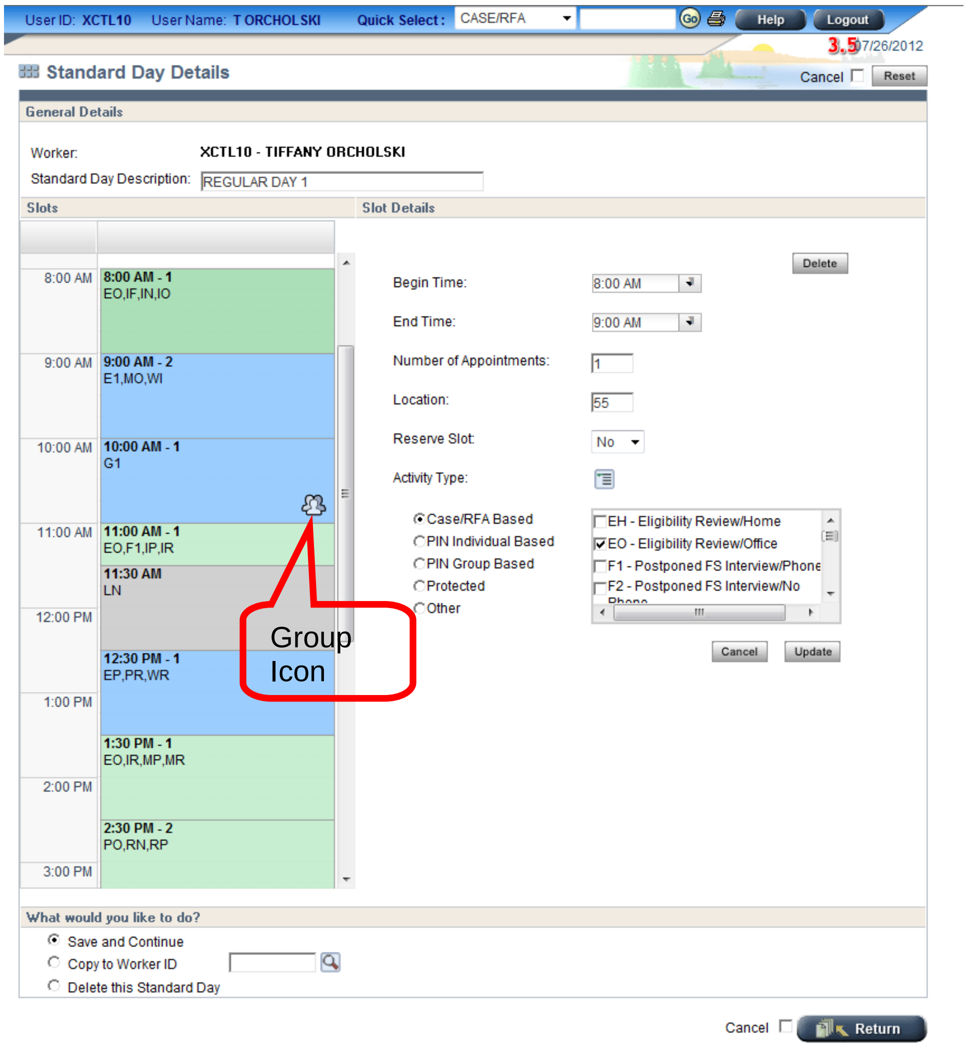
  - For Case/RFA/Other and PIN Individual slots, workers can allow up to 2 appointments to be scheduled.

  - For Group PIN slots, up to 200 PINs can be scheduled. This can be beneficial for W-2 agencies with enrollment, orientation, job clubs and workshop group sessions.

Creating a New Standard Day - The Standard Day Details page will be blank and allow information to be filled when creating a new standard day.



Updating an Existing Standard Day — The Standard Day Details page will load with the information previously entered when viewing an existing standard day.

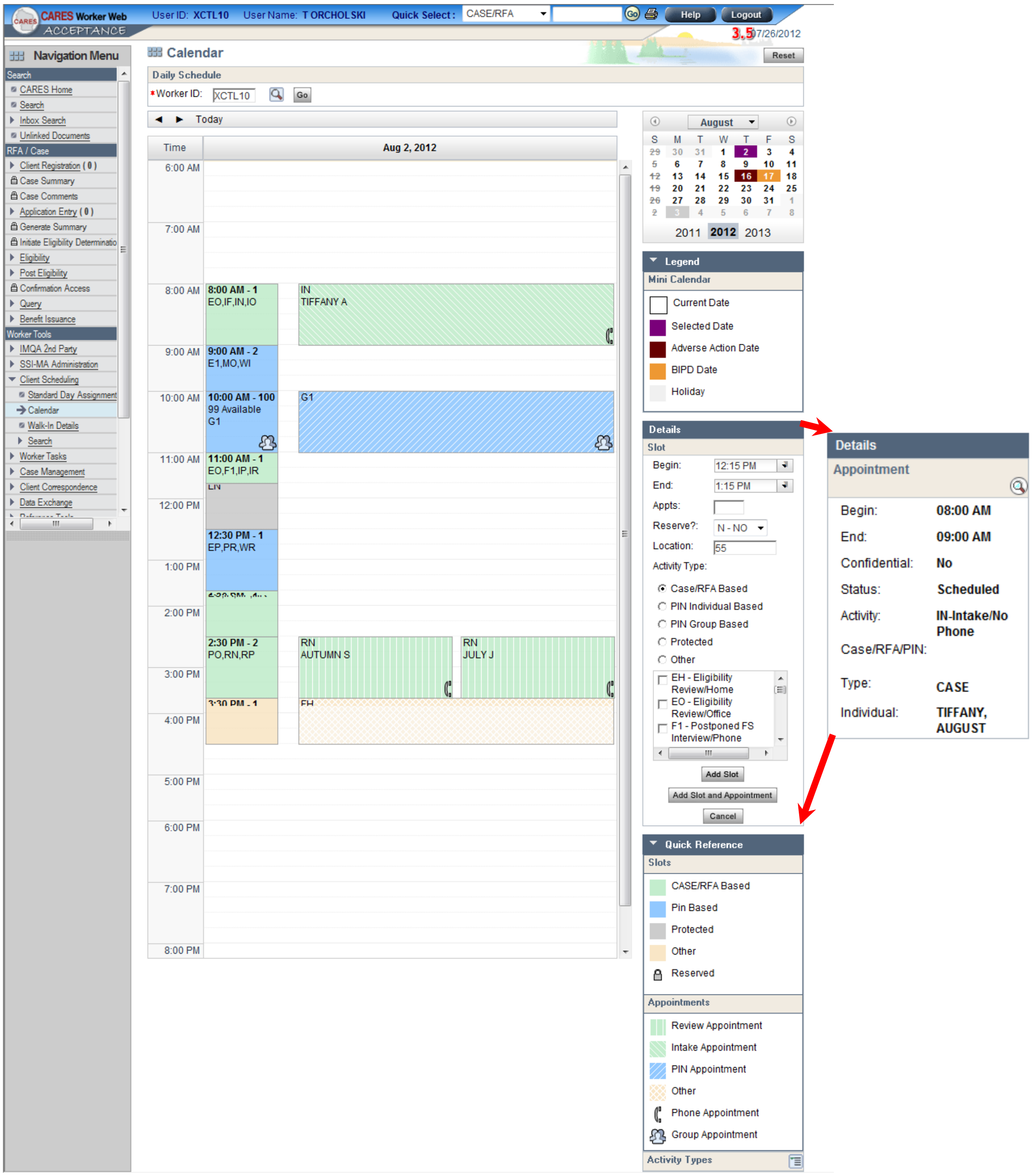


CALENDAR:

The Calendar page (seen on page 11), can be directly accessed from the navigation menu and shows several components for easily adding a slot or scheduling an appointment to a slot.

Page Features:

- The Calendar page shows the slots and appointments scheduled for a particular worker for a particular day (The page will load with the current system date) and are color-coded for easy referencing.
- The column on the right side of the Calendar page provides the following information:
  - The Mini Calendar shows important CARES dates, for example Adverse Action and CARES Holidays. Workers can click on a particular date or use the arrows to navigate to a different month.
  - The Details section allows workers a quick view of their slot or appointment depending on where the worker clicks on the page. Workers can add a slot through this panel or update details of a slot. They can also click the “Add Appointment” button to schedule an appointment to an existing slot on the “Appointment Details” page (discussed in the next section). If the user has clicked on an appointment, the section will display a quick snapshot of the appointment information.
  - The Quick Reference section shows the descriptions for the colors on the page, icons and the activity type descriptions.


CARES Worker Web
ACCEPTANCE
User ID: XCTL10 User Name: T ORCHOLSKI Quick Select: CASE/RFA
Help
Logout
Navigation Menu
Calendar
Daily Schedule
Worker ID: XCTL10
Aug 2, 2012
August
2011 2012 2013
Legend
Mini Calendar
Current Date
Selected Date
Adverse Action Date
BIPD Date
Holiday
Details
Slot
Begin: 12:15 PM
End: 1:15 PM
Appts:
Reserve?: N - NO
Location: 55
Activity Type:
Case/RFA Based
PIN Individual Based
PIN Group Based
Protected
Other
Add Slot
Add Slot and Appointment
Cancel
Quick Reference
Slots
CASE/RFA Based
Pin Based
Protected
Other
Reserved
Appointments
Review Appointment
Intake Appointment
PIN Appointment
Other
Phone Appointment
Group Appointment
Activity Types
Details
Appointment
Begin: 08:00 AM
End: 09:00 AM
Confidential: No
Status: Scheduled
Activity: IN-Intake/No Phone
Case/RFA/PIN:
Type: CASE
Individual: TIFFANY, AUGUST

APPOINTMENT DETAILS PAGE:

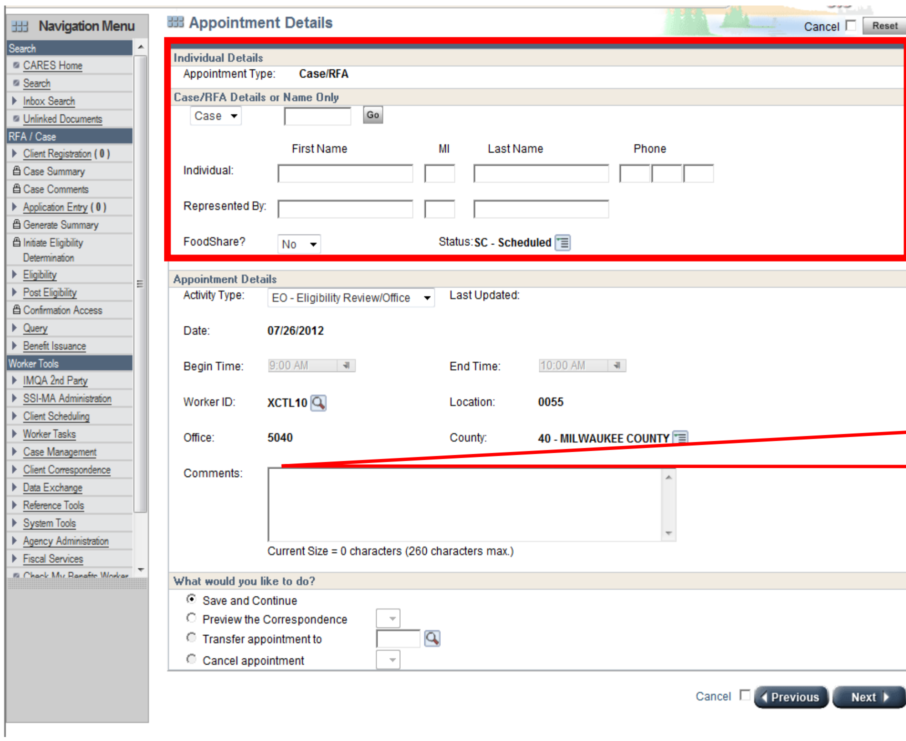
The Appointment Details page (see pages 14 and 15) can be accessed from the following pages:

- Calendar (By clicking on the “Add Appointment” or “Add Slot and Appointment” button or the magnifying glass icon on an existing Appointment)
- Available Slot Search Results (By selecting a slot and clicking “Next”)
- Appointments/Walk-ins Search Results (By clicking on the magnifying glass icon on an existing appointment in the search result)

Page Features:

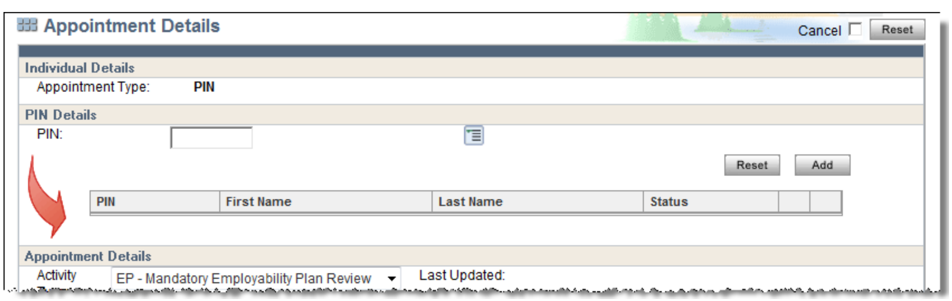
- Schedule an appointment
- Make Updates to an existing appointment (Pull in an updated name and phone number from a case; add comments)
- View an existing appointment
- Reschedule an existing appointment to another date/time with the same worker
- Transfer an appointment at the same date/time/location to another worker
- Cancel a scheduled appointment
- The Appointment Details page features a “Go” or “Add” button that will pull in the name and phone number from CWW based on the Case/RFA/PIN entered.
    - For Case/RFA or Name Only appointments, this page can also be used to record information of a representative of the primary person when the appointment is scheduled with them.
    - For Case/RFA or Name Only appointments, the FoodShare flag if flipped to “Yes” will cause a NOMI to go out on appointments scheduled with certain intake codes (see section on NOMI in the Communication Reminders section) that are not marked as “Seen” by the end of a day.
- Comments can be entered on this page (Please note that these comments will not carry over to case comments)
- This page can be used to preview and locally print correspondence related to an appointment by clicking “Preview the Correspondence” option.

When accessed for scheduling an appointment, the page will be blank and the worker can enter appointment information.

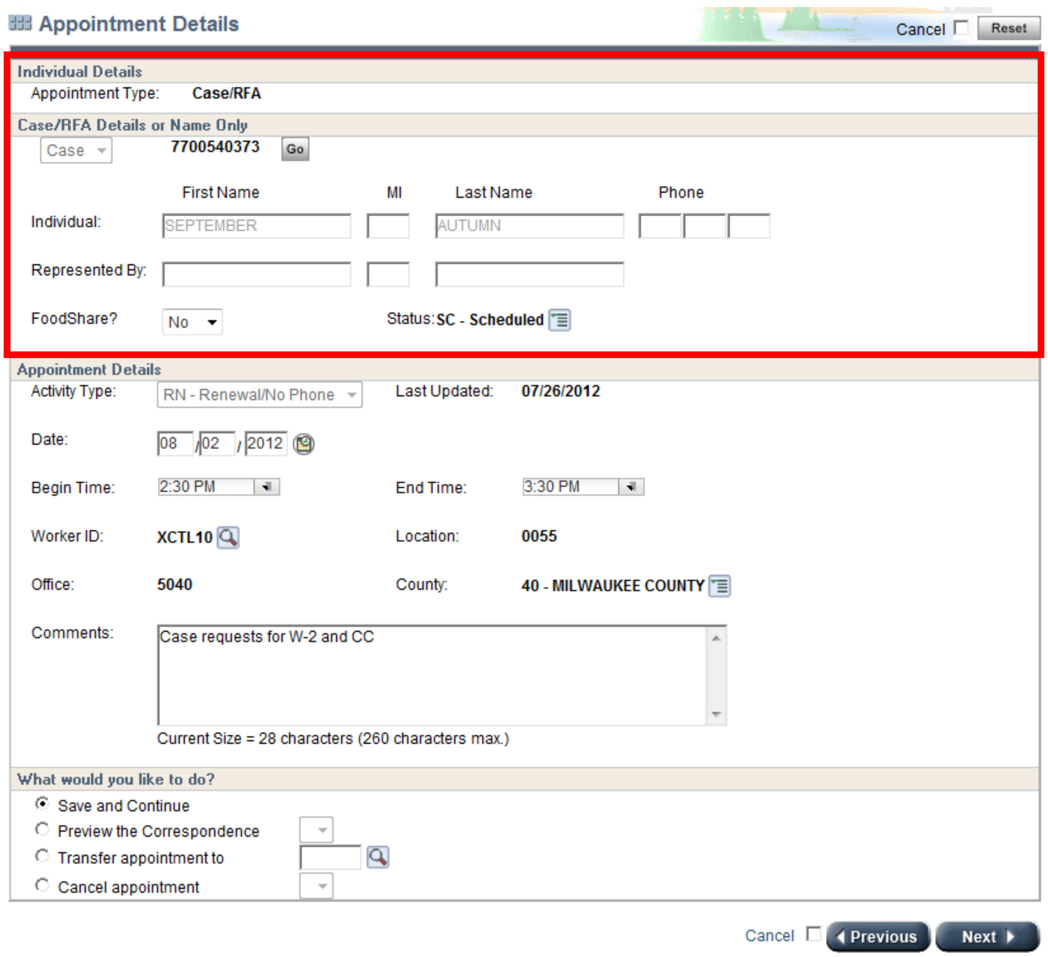


Note: The comments created in Client Scheduling will *NOT* be transferred to case comments.

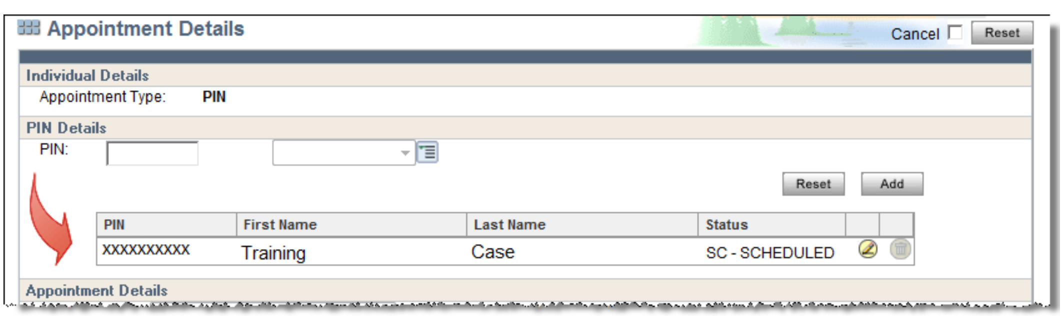
The Individual Details will display either Case/RFA or Name Only or PIN details, depending on the activity type on the slot to which the appointment is being scheduled.



When the worker accesses the page to view, edit, reschedule, transfer or cancel a scheduled appointment, the page will load with details of the appointment.



The PIN Details section will display when a PIN Individual or PIN Group Based appointment is accessed.



<u>WALK-IN DETAILS PAGE:</u>

The Walk-In Details page can be accessed from the Navigation Menu or the Appointments/Walk-in Search Criteria page (by clicking on the magnifying glass next to a walk-in search result).

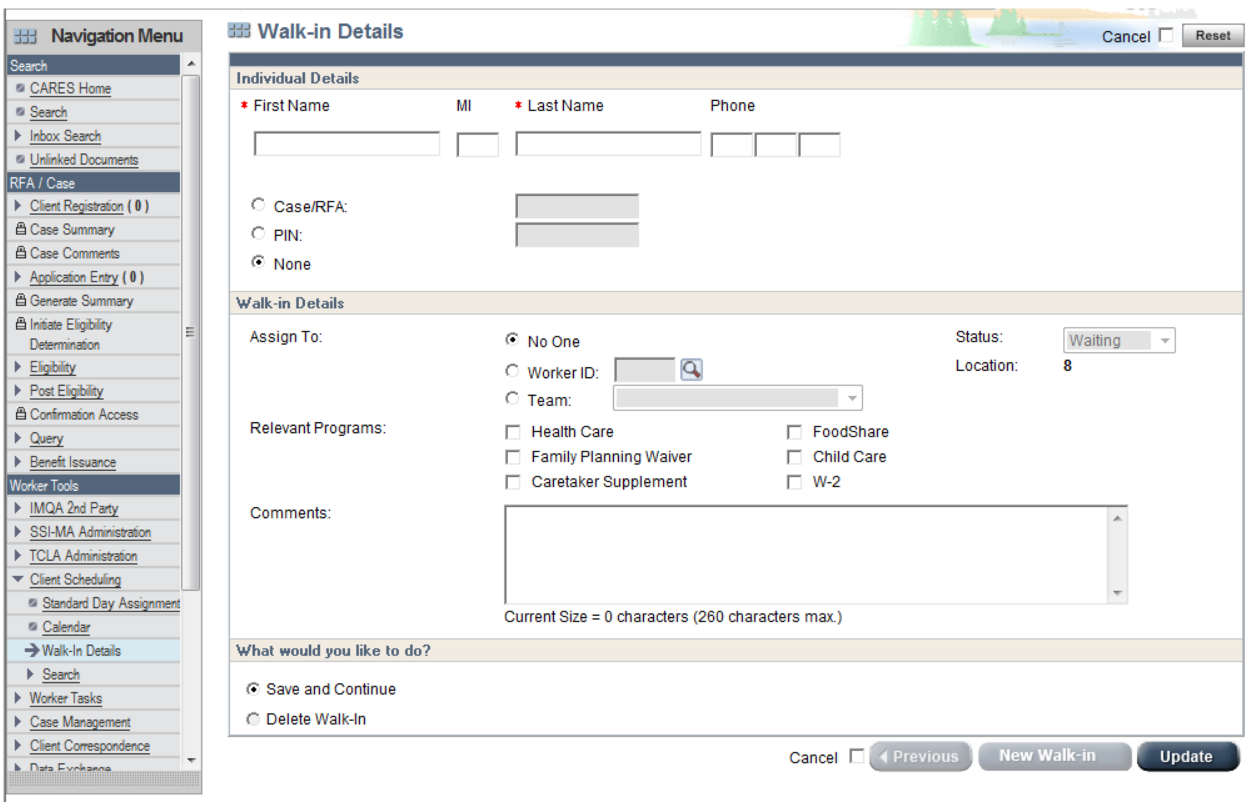
Use the Walk-in Details Page to:

1. Create a walk-in entry for customers who do not have a scheduled appointment for that day and to view an existing walk-in.
2. Gather various details about the walk-in; if they have an existing Case/RFA or PIN, which programs they are interested in applying or completing a renewal for, or if the walk-in just has general questions.
3. Assign a walk-in to a worker or team of workers.

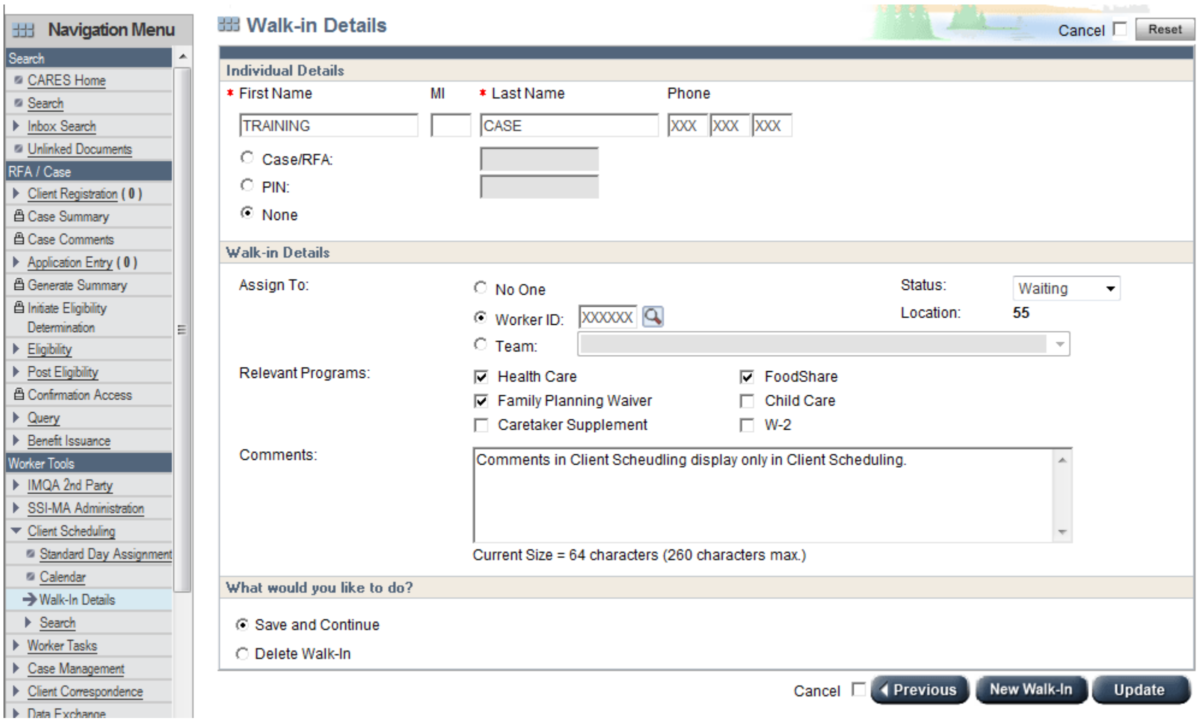
Page Features:

- A walk-in entry can be assigned to a Worker ID or directly to a Team of Workers. It may also be created as assigned to no one.
- Users can add comments to the walk-in entry. Please note that these will not carry over to CWW.
- A walk-in entry will always be defaulted to a status of 'Waiting'.

<u>Creating a new walk-in entry</u> – The page will display blank with location information defaulted from SMUM screen in the CARES mainframe and a default status of "Waiting".



Viewing an Existing Walk-in - When viewing an existing Walk-in, the Walk-in Details page will display the information that has been created.



<u>AVAILABLE SLOTS SEARCH PAGE:</u>

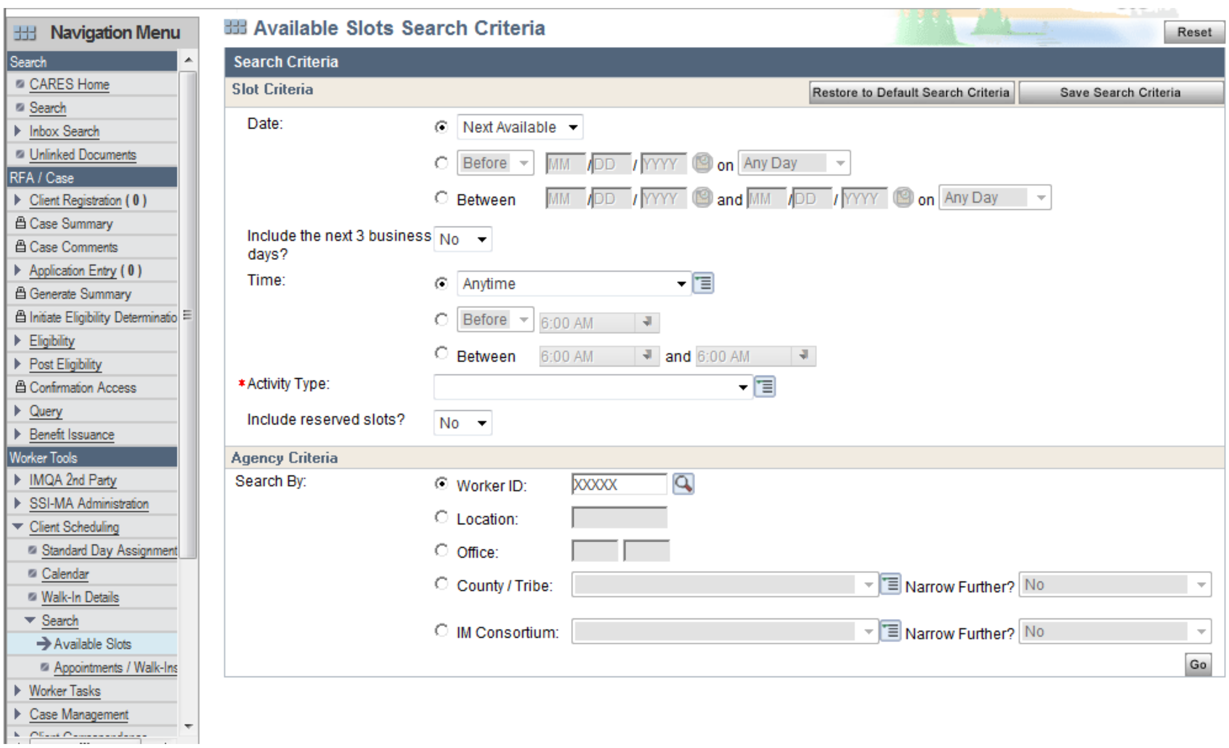
The Available Slot Search Criteria page can be directly accessed from the navigation menu and allows workers to search for available slots using specific search criteria. This page may also be used for planning purposes to see when workers have scheduled vacation, personal time, meetings, etc.

This page has two different sections that work dependently: Slot Criteria and Agency Criteria.

At a minimum, the worker must select an Activity Type from the Slot Criteria dropdown menu from the Slot Criteria section and at least one Search By selection from Agency Criteria section.

Page Features:

- Workers can save criteria entered on this page using the Save Search Criteria. In order to restore the default criteria, they can click on the "Restore to Default Search Criteria" button.
- Search for slots can be done for a worker, location, office, county, county level team, consortium or consortium level team



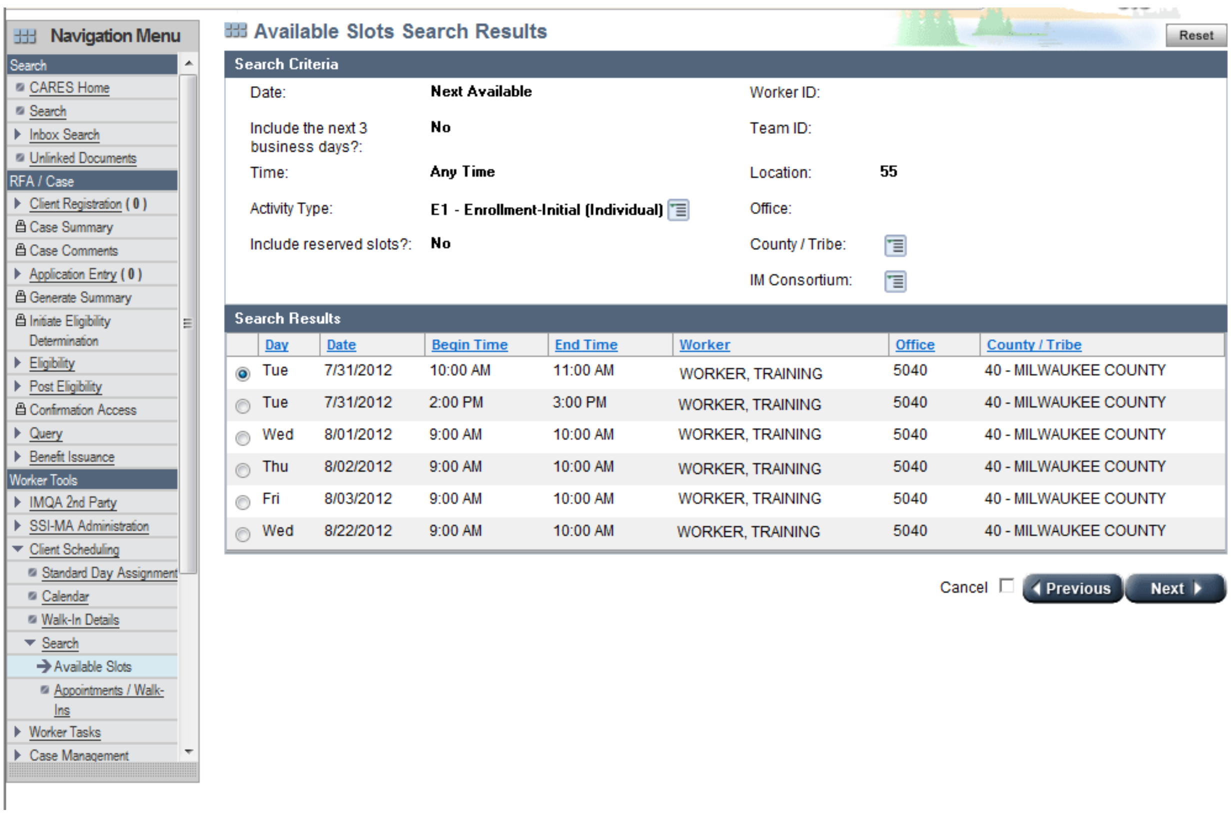
AVAILABLE SLOTS SEARCH RESULTS PAGE:

By clicking “Go” on the Available Slots Search Criteria page, the worker will navigate to the Available Slots Search Results page. The page has two sections:

- Search Criteria - displays criteria selected on the Available Slots Search Criteria page.
- Search Results - displays the first 250 slots that match the specific criteria selected.

By selecting a radio button and clicking next, the worker will navigate to the Appointment Details page to complete scheduling an appointment.

> ➢ Please Note: If the worker is searching for slots in the past, the radio button will be disabled. The radio button against a slot will also be disabled, if the worker does not have update access to the office of the slot.



APPOINTMENTS/WALK-INS SEARCH CRITERIA PAGE:

The Appointments/Walk-ins Search Criteria page (seen on page 21) can be accessed from the navigation menu and allows workers to search for existing appointments and walk-ins. Two common uses for the page are:

- Searching for a particular appointment
- Searching for a wide range of appointments or walk-ins scheduled for the day

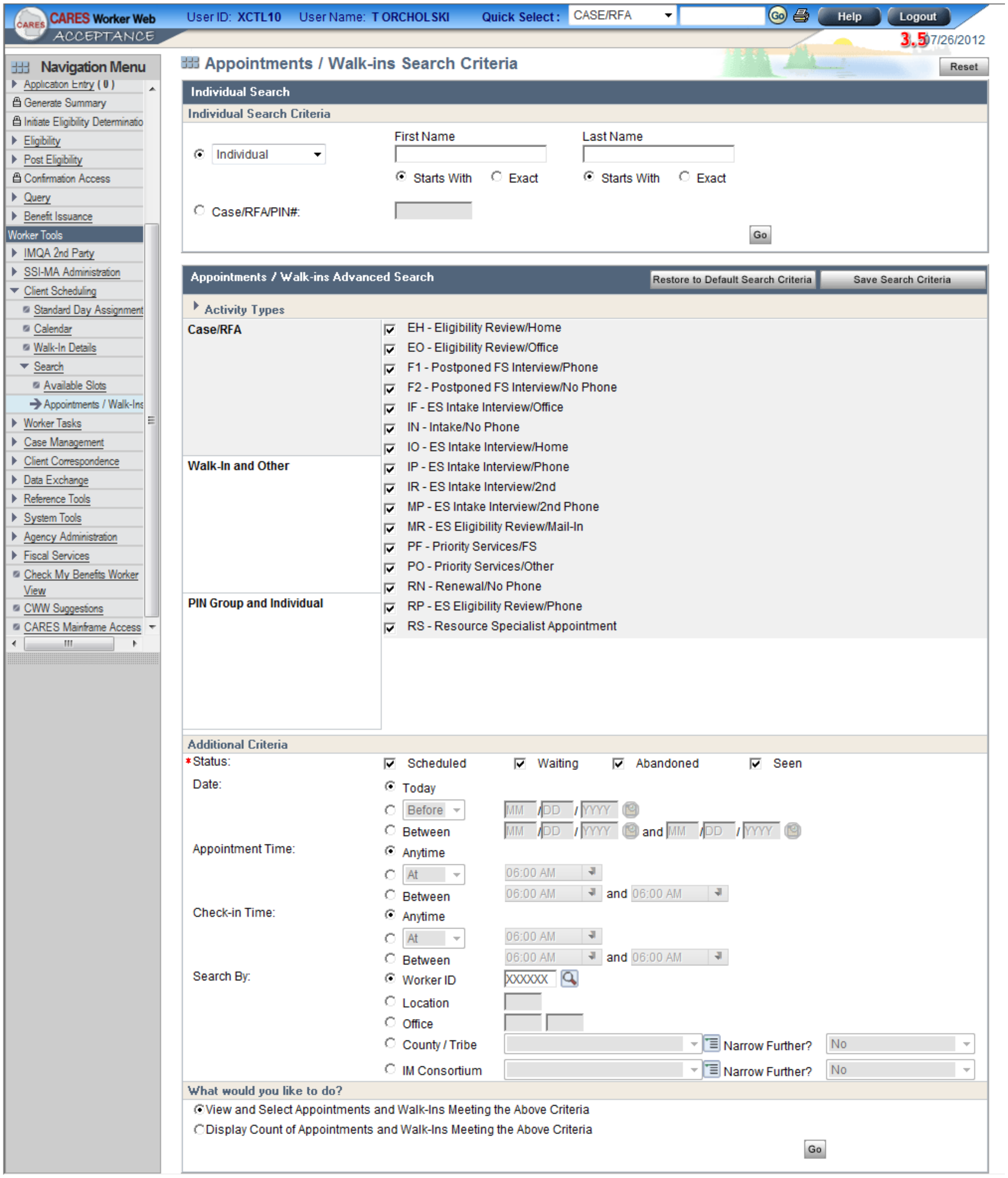
The page has two sections that work independently of each other: Individual Search and Appointment/Walk-ins Advanced Search.

- The Individual Search section allows workers to search by an Individual/Representative or by Case/RFA/PIN.
- The Appointment/Walk-ins Advanced Search section allows workers to search for multiple activity codes, dates, times and locations.

By clicking ‘Go’ on the Appointments/Walk-ins Search Criteria page, the worker will navigate to the Appointments/Walk-ins Search Results page where the results of the search will be displayed.

Page Features:

- Workers can save the search criteria of their choice using the “Save Search Criteria” button.
- Search for Appointments & Walk-ins can be done for a worker, location, office, county, county level team, consortium and consortium level team.
- Workers can view and select Appointment/Walk-ins or have the system display a count of the Appointment/Walk-ins meeting the search criteria.


CARES Worker Web
ACCEPTANCE
User ID: XCTL10 User Name: T ORCHOLSKI Quick Select : CASE/RFA
Help
Logout
3.5 07/26/2012
Navigation Menu
Application Entry (0)
Generate Summary
Initiate Eligibility Determinatio
Eligibility
Post Eligibility
Confirmation Access
Query
Benefit Issuance
Worker Tools
IMQA 2nd Party
SSI-MA Administration
Client Scheduling
Standard Day Assignment
Calendar
Walk-In Details
Search
Available Slots
Appointments / Walk-Ins
Worker Tasks
Case Management
Client Correspondence
Data Exchange
Reference Tools
System Tools
Agency Administration
Fiscal Services
Check My Benefits Worker View
CWW Suggestions
CARES Mainframe Access
Appointments / Walk-ins Search Criteria
Reset
Individual Search
Individual Search Criteria
First Name
Last Name
Individual
Starts With
Exact
Starts With
Exact
Case/RFA/PIN#:
Go
Appointments / Walk-ins Advanced Search
Restore to Default Search Criteria
Save Search Criteria
Activity Types
Case/RFA
EH - Eligibility Review/Home
EO - Eligibility Review/Office
F1 - Postponed FS Interview/Phone
F2 - Postponed FS Interview/No Phone
IF - ES Intake Interview/Office
IN - Intake/No Phone
IO - ES Intake Interview/Home
Walk-In and Other
IP - ES Intake Interview/Phone
IR - ES Intake Interview/2nd
MP - ES Intake Interview/2nd Phone
MR - ES Eligibility Review/Mail-In
PF - Priority Services/FS
PO - Priority Services/Other
RN - Renewal/No Phone
PIN Group and Individual
RP - ES Eligibility Review/Phone
RS - Resource Specialist Appointment
Additional Criteria
*Status:
Scheduled
Waiting
Abandoned
Seen
Date:
Today
Before
MM / DD / YYYY
Between
MM / DD / YYYY and MM / DD / YYYY
Appointment Time:
Anytime
At
06:00 AM
Between
06:00 AM and 06:00 AM
Check-in Time:
Anytime
At
06:00 AM
Between
06:00 AM and 06:00 AM
Search By:
Worker ID
XXXXXX
Location
Office
County / Tribe
Narrow Further? No
IM Consortium
Narrow Further? No
What would you like to do?
View and Select Appointments and Walk-Ins Meeting the Above Criteria
Display Count of Appointments and Walk-Ins Meeting the Above Criteria
Go

APPOINTMENTS/WALK-INS SEARCH RESULTS PAGE:

This page will load depending on the search criteria selected on the Appointments/Walk-ins Search Criteria page.

Using the Customer Search, CWW will display past and future appointments for that Individual or Case/RFA/PIN.

Using the Appointment/Walk-ins Advanced Search criteria, CWW will display all the appointments and/or walk-ins that meet the specific criteria.

By clicking a magnifying glass, workers will navigate to the Appointment Details page or Walk-In Details page.

The worker can take action on the Appointments/Walk-ins Search Results page to check-in an appointment or to mark a walk-in or appointment as Seen or Abandoned. Abandoned would be used if someone did not complete their interview or appointment, after they have been checked in or marked as 'Seen'.

- C — Check-in
- S — Seen
- A — Abandoned

The 'Assigned To' column on this page will indicate if a walk-in entry has been assigned to a team or a worker. (Please note that appointments will always be assigned to a worker)

Clicking the 'Refresh' button will re-load the first page of results with the same criteria used on the previous search. The page will load with any changes or updates that have been completed on appointments or walk-ins.

Appointments / Walk-ins Search Results

Refresh button

Appointments/Walk-ins Advanced Search

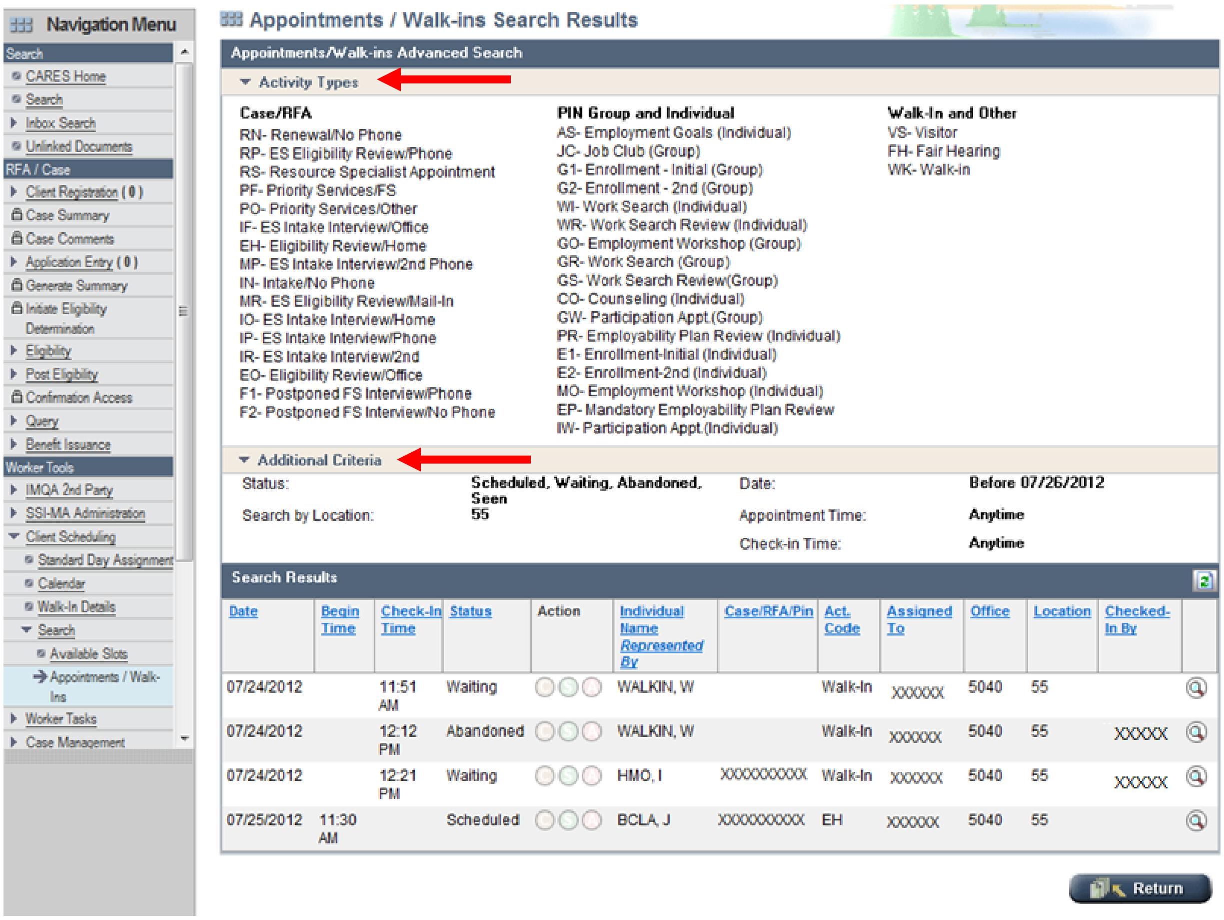
- Activity Types
- Additional Criteria

Search Results

Date	Begin Time	Check-In Time	Status	Action	Individual Name *Represented By*	Case/RFA/Pin	Act. Code	Assigned To	Office	Location	Checked-In By	
10/01/2012		1:56 PM	Seen		OCTOBER, T		Walk-In	PWRGN7	5018	30	PWRGN7	
10/01/2012		1:57 PM	Waiting		SECOND, F		Walk-In	15	5018	30	PWRGN7	
10/01/2012	3:00 PM		Scheduled		JAN12, B	0102529205	IF	PWRGN7	5018	30		
10/01/2012	3:00 PM	2:10 PM	Seen		BIRCH, A	7202313448	GR	PWRGG8	5018	30	PWRGN7	
10/01/2012	3:00 PM	2:11 PM	Seen		BAXTER, B	1102908410	IP	PWRC34	5018	30	PWRGN7	
10/01/2012	3:00 PM		Scheduled		FS-ASSESSM, F	6102752562	IP	PWRC34	5018	30		
10/01/2012	3:00 PM	2:12 PM	Seen		FIR, D	9202313806	GR	PWRGG8	5018	30	PWRGN7	
10/01/2012	3:00 PM	2:14 PM	Waiting		BCPLUS, B	1102778915	F1	PWRER7	5018	30	PWRGN7	
10/01/2012	4:00 PM		Scheduled		FALL, A	6202313439	CO	PWRER7	5018	30		

Return

Past appointments and walk-ins will be displayed as read-only. The worker can expand the Activity Types and Additional Criteria in order to view the search criteria used to produce the Search Results.



TRAINING:

- Training on how to access and utilize Client Scheduling will be available prior to implementation.
- Client Scheduling is currently available in the CWW Training Environment for practice.
- The Client Scheduling Training will consist of:
    - A printable training document describing the new system and its functions. This document can be found on the DHS Learning Center.
    - Process Help Chapter *1.8 Client Scheduling*.
    - Recorded Demonstrations on how to use Client Scheduling can be found on the DHS Learning Center.

COMMUNICATION REMINDER:

The CARES Call Center has sent multiple messages to the CARES and Policy Coordinators in preparation for the mainframe to CWW Client Scheduling transition. Workers must take the action outlined in this communication prior to November 9th 2012.

The information is included below:

IMPORTANCE OF ACCURATE WORKER LOCATION ON SMUM:

With the implementation of Integrated Client Scheduling it is important that all active CWW workers that will be utilizing Client Scheduling have the correct default location code referenced on their SMUM screen in the CARES mainframe.

OBSOLETE ACTIVITY TYPES AND CODES:

With the implementation of Client Scheduling, the following Client Scheduling codes and notices will be obsolete:

Current Activity Type	Notice Action Code	Notice Type	Activity Type Description
EI	CSLR	N/A	ES Intake Interview
ER	CSLS	N/A	ESC Review Interview
CS	N/A	N/A	Client Reg/Scheduled
CW	N/A	N/A	Client Reg/Walk In
GE	CSL8	IM Only	ES Interview Appt
GC	N/A	N/A	Generic Activity
L1	CSLL	W-2/FSET	LF Case Mgmnt/Enroll-Initial
L2	CSLM	W-2/FSET	LF Case Mgmnt/Enroll-Final
FF	CSLH	W-2/FSET	Reconciliation/Fact Finding
TR	CSL9	W-2/FSET	Training Review

IMPORTANT NOTE:

- ***No slots or appointments*** created with the codes above will be transitioned to the new system.
- ***No standard days*** that contain slots created with the codes above will be transitioned to the new system.
- Please update no later than November 9th any existing slots and appointments that contain any of the above codes to a valid Activity Type/Code ***prior to implementation.***

VALID ACTIVITY CODES EFFECTIVE NOVEMBER 12TH, 2012:

The following chart indicates which activity codes and letters ***will be available*** to users in the new Client Scheduling system along with updated descriptions and notice types. Note that the new codes will be available to workers after implementation on November 12th, 2012 for workers to update standard days and slots. The new codes are displayed in a **bold font** within the table.

CLIENT SCHEDULING CORRESPONDENCE REFERENCE TABLE

Current Activity Type	Notice Action Code	Notice Type	Activity Type Description	Pre-Requisites/Notes	NOMI Applicable? Is a NOMI sent for a missed FoodShare appointment of this activity type?
IM ONLY & SHARED ACTIVITY CODES/CORRESPONDENCE					
EH	CSLC	Shared (CC/FS/W-2)	Eligibility Review/Home	Case or RFA Number required.	No
EO	CSLD	Shared (CC/FS/W-2)	Eligibility Review/Office	Case or RFA Number required.	No
IF	CSL1	Shared (CC/FS/W-2)	ES Intake Interview/Office	Case or RFA Number required.	Yes
PF	CSL1	Shared (CC/FS/W-2)	Priority Services/FS	Case or RFA Number required.	Yes
IO	CSL2	Shared (CC/FS/W-2)	ES Intake Interview/Home	Case or RFA Number required.	Yes
IP	CSLP	Shared (CC/FS)	ES Intake Interview/Phone	Case or RFA Number required; Phone Number Required on Case/RFA	Yes
IR	CSL3	Shared (CC/FS/W-2)	ES Intake Interview/2nd	Case or RFA Number required.	Yes
F1	CSLT	IM Only (FS)	Postponed FS Interview/Phone	Case Number Required; Phone Number Required on Case/RFA (This activity type should only be used for a case with expedited FS benefits with a current filing date and not for an RFA or case without FS or case with old filing dates)	Yes
F2	CSLU	IM Only (FS)	Postponed FS Interview/No Phone	Case Number Required. (This activity type should only be used for a case with expedited FS benefits with a current filing date and not for an RFA or case without FS or case with old filing dates)	Yes

Current Activity Type	Notice Action Code	Notice Type	Activity Type Description	Pre-Requisites/Notes	NOMI Applicable? Is a NOMI sent for a missed FoodShare appointment of this activity type?
IM ONLY & SHARED ACTIVITY CODES/CORRESPONDENCE					
MP	CSLQ	Shared (CC/FS)	ES Intake Interview/2nd Phone	Case or RFA Number required; Phone Number Required on Case/RFA	Yes
RP	CSLO	Shared (CC/FS)	ES Eligibility Review/Phone	Case or RFA Number required; Phone Number Required on Case/RFA	No

WORK PROGRAM ACTIVITY CODES/CORRESPONDENCE (PIN BASED)					
AS	CSLA	W-2/FSET	Employment Goals (Individual)	PIN Required; WP System Status Code is updated from Referred to Scheduled	No
CO	CSLA	W-2/FSET	Employment Goals (Individual)	PIN Required; WP System Status Code is updated from Referred to Scheduled	No
E1	CSL4	W-2 Only	Enrollment – Initial (Individual)	PIN Required; Individual should be referred to W-2	No
	CSL5	FSET Only		PIN Required; Individual should be referred to FSET	
	CSLI	W-2/FSET		PIN Required;	
G1	**CSL4**	**W-2 Only**	**Enrollment – Initial (Group)**	**PIN Required; Individual should be referred to W-2**	**No**
	CSL5	**FSET Only**		**PIN Required; Individual should be referred to FSET**	
	CSLI	**W-2/FSET**		**PIN Required;**	
E2	CSL6	W-2 Only	Enrollment - 2nd (Individual)	PIN Required; Individual should be referred to W-2	No
	CSL7	FSET Only		PIN Required; Individual should be referred to FSET	
	CSLI	W-2/FSET		PIN Required;	
G2	**CSL6**	**W-2 Only**	**Enrollment - 2nd (Group)**	**PIN Required; Individual should be referred to W-2**	**No**
	CSL7	**FSET Only**		**PIN Required; Individual should be referred to FSET**	
	CSLI	**W-2/FSET**		**PIN Required;**	

Current Activity Type	Notice Action Code	Notice Type	Activity Type Description	Pre-Requisites/Notes	NOMI Applicable? Is a NOMI sent for a missed FoodShare appointment of this activity type?
GR	CSLJ	W-2 Only	Work Search (Group)	PIN Required	No
GW	CSLI	W-2/FSET	Participation Appt. (Group)	PIN Required	No
IW	**CSLI**	**W-2/FSET**	**Participation Appt. (Individual)**	**PIN Required**	**No**
JC	CSLG	W-2/FSET	Job Club (Group)	PIN Required	No
MO	CSLK	W-2/FSET	Employment Goals (Individual)	PIN Required	No
GO	**CSLK**	**W-2/FSET**	**Employment Goals (Group)**	**PIN Required**	**No**
PR	CSLB	W-2/FSET	Employability Plan Review (Individual)	PIN Required	No
WI	CSLF	W-2/FSET	Work Search (Individual)	PIN Required	No
WR	CSLE	W-2 Only	Work Search Review (Individual)	PIN Required	No
GS	**CSLE**	**W-2 Only**	**Work Search Review (Group)**	**PIN Required**	**No**

SCHEDULABLE ACTIVITY CODES – NO CORRESPONDENCE GENERATED					
FH	N/A	N/A	Fair Hearing	May be scheduled with Customer Name Only or Name Plus Case/RFA	No
MR	N/A	N/A	ES Eligibility Review/Mail-In	Case or RFA Number required.	No
PO	N/A	N/A	Priority Services/Other	Case or RFA Number required.	No
VS	N/A	N/A	Visitor	May be scheduled with Customer Name Only or Name Plus Case/RFA	No

PROTECTED ACTIVITY CODES-NOT SCHEDULABLE/NO CORRESPONDENCE GENERATED					
BR	N/A	N/A	Break		No
HP	N/A	N/A	Personal Holiday		No
IL	N/A	N/A	Sick Leave		No
JD	N/A	N/A	Jury Duty		No
LN	N/A	N/A	Lunch		No
MT	N/A	N/A	Meeting		No
OT	N/A	N/A	Out of the Office		No

Current Activity Type	Notice Action Code	Notice Type	Activity Type Description	Pre-Requisites/Notes	NOMI Applicable? Is a NOMI sent for a missed FoodShare appointment of this activity type?
PH	N/A	N/A	Phone Contact		No
PT	N/A	N/A	Protected Time		No
ST	N/A	N/A	Staff Meeting		No
VA	N/A	N/A	Vacation		No
New Activity Codes and Correspondence within Client Scheduling					
	CSMI	**IM Only**	**NOMI-Notice of Missed Interview**	**FoodShare flag on Appointment should be set to 'Yes' and Activity Type of Appointment should be marked as 'YES' in the NOMI Applicable column. For appointments that are not marked as "Seen" by the end of the day and have a RFA/Case with an active filing date, a NOMI letter will be sent.**	**N/A**
IN	**CSPI**	**IM Only**	**Intake - No Phone**	**Case or RFA Number required.**	**Yes**
RN	**CSPR**	**IM Only**	**Renewal - No Phone**	**Case or RFA Number required.**	**No**
EP	**CSEP**	**W-2 Only**	**Mandatory Employability Plan Review**	**PIN Required**	**No**
WK	**N/A**	**N/A**	**Walk-in**	**This code is used to track walk-in entries and can be displayed on the Appointments/Walk-ins Search Results page. No appointments will be scheduled to this code.**	**No**
RS	**N/A**	**N/A**	**Resource Specialist Appointment**	**Case or RFA Number required.**	**No**

WALK-INS:

The codes *CW* and *CS* will be obsolete and will be replaced by a new process to record and track walk-ins. More information will be provided in Training and Process Help.

NOMI (NOTICE OF MISSED INTERVIEW):

The new Client Scheduling system will send out an automated NOMI (Letter Code = CSMI) for FoodShare interview appointments (scheduled with any of the activity codes mentioned in the table below) that are not marked as “seen” by the end of the day.

F1 (Postponed FS Interview/ Phone)
F2 (Postponed FS Interview/No Phone)
IN (Intake - No Phone)
MP (ES Intake Interview/2nd Phone)
IR (ES Intake Interview / 2nd)
IP (ES Intake Interview Phone)
IO (ES Intake Interview Home)
PF (Priority Services/FS)
IF (ES Intake Interview/Office)

Training and Process Help 1.8.9.6 provides details of the Automated NOMI process.

START/END TIMES ON SLOTS, APPOINTMENTS & STANDARD DAYS:

*Please update existing standard days and slots to reflect these limitations **prior** to implementation:*

- All existing slots and appointments and standard days must meet defined begin/end time requirements. They must be between the hours of 6:00 AM and 9:00PM.
- Each appointment must begin at the quarter hour (on the hour: 00, quarter after hour: 15, half past hour: 30 or at: 45) or they will *not* successfully transitioned.

STANDARD DAYS:

- Effective at implementation each worker will be limited to the first 10 standard days. Workers with more than 10 standard days should review the standard days that they currently have set up and choose only 10 to retain. Only the first 10 **valid** standard days will be carried over, for every user into Client Scheduling.
- Valid standard days do not contain slots with any of the obsoleted codes mentioned under ***OBSOLETE ACTIVITY TYPES AND CODES***.
- Valid standard days have slots with start/end times between 6:00AM– 9:00PM and start and end at times of: 00, :15, :30 or :45.

*Failure to update existing standard days and appointment slots to reflect these limitations **prior** to implementation will prevent your schedule and standard days from converting to the new system.*

NOTICE TO AGENCIES USING ROUND ROBIN/UNIT SCHEDULING:

With the implementation of Client Scheduling in November, Unit (Round Robin) Scheduling will be obsolete. In preparation for this move, agencies must move all appointments scheduled through unit/round robin, occurring on or after November 9th, 2012, to individual workers calendars. Workers will have to set up CSSD (Standard Days) and CSMS (Worker Monthly

Schedule) in CARES mainframe by November 9th, 2012, to enable the appointments to transition to the new system. It is not necessary to delete the unit/round robin schedules from November 9th and beyond, as they will not transition to the new system.

Client Scheduling will offer a new feature of scheduling customers to available slots created by workers within a "team". More information and instruction will be provided through training, Process Help 1.8 and Ops Memo 12-42, Team Management.

> ➢ **Note:** Additional team functionality to support the new W-2 geographical areas will be available in CWW on January 1, 2013. W-2 agencies **should not** utilize the team functionality that is available under the County or IM Consortium options. Workers with a W-2 profile type will not have access to use or change any teams created under County or IM Consortium as of January 1st when changes will be made in CWW in preparation for the W-2 2013 Contract. Additional information will be released through an Operations Memo, when the new functionality is available for W-2 geographical areas.

NOTICE TO AGENCIES REGARDING DOUBLE BOOKING OF APPOINTMENTS:

With the implementation of Client Scheduling, all Case/RFA/Other and PIN Individual Slots will allow up to 2 appointments per slot. Agencies must ensure that all appointments scheduled to Case/RFA/Other and PIN Individual Slots have no more than 2 appointments booked per slot. All appointments over 2 will need to be redistributed across worker's calendars so that no slot has more than 2 appointments scheduled to it. Please find the list of applicable activity codes below:

Please note that up to 2 appointments can be created for a slot(s) of the following activity types.

Activity Type Category	CODE	DESCRIPTION
Case/RFA	EH	Eligibility Review/Home
	EO	Eligibility Review/Office
	F1	Postponed FS Interview/Phone
	F2	Postponed FS Interview/No Phone
	IF	ES Intake Interview/Office
	IO	ES Intake Interview/Home
	IP	ES Intake Interview/Phone
	IR	ES Intake Interview/2nd
	MP	ES Intake Interview/2nd Phone
	MR	ES Eligibility Review/Mail-In
	PF	Priority Services/FS
	PO	Priority Services/Other
	RP	ES Eligibility Review/Phone
Other	FH	Fair Hearing
	VS	Visitor
PIN Individual	AS	Assessment (Individual)
	CO	Counseling (Individual)
	PR	Periodic Review (Individual)
	WI	Work Search (Individual)

MOST RECENT COMMUNICATION:

Below is the most recent communication sent on October 15th 2012, from the CARES Call Center to CARES and Policy Coordinators, the Consortia Operational Leads, Tribal IM Agencies and State CC List with the “Top 5 Actions to take before iCS.” This list is a summary of the *Communication Reminders* listed above.

Top 5 Actions to take before iCS

1. **Standard Days** - With iCS, all users will be able to create a maximum of 10 standard days per user. In order to prepare for the transition, please delete all standard days that you do not need to transition over and retain only your top ten standard days. Alternatively you can renumber your ten most commonly used standard days from 1-10.

2. **Start Time/End Time** – Ensure that the slots you create on your standard days (CSSD) or daily schedule (CSDS) or the appointments you schedule using the appointment scheduler (CSAS) or add on to your daily schedule (CSDS) are on the hour, 15 minutes past, 30 minutes past or 45 minutes past the hour (:00, :15, :30, :45) and are between 6:00AM and 9:00PM.

3. **Obsolete Activity Codes** – Make sure you are not creating any slots on your standard days (CSSD) or daily schedule (CSDS) or scheduling any appointments using the following activity codes because they will become obsolete with iCS:

CODE	DESCRIPTION
EI	ESC Intake Interview
ER	ESC Review Interview
CS	Client Reg/Scheduled
CW	Client Reg/Walk In
GE	ES/General
GC	General Activity
L1	LF Case Mgmnt/Enroll-Initial
L2	LF Case Mgmnt/Enroll-Final
FF	Reconciliation/Fact Finding
TR	Training Review

4. **Scheduling more than 2 Appointments** – With iCS all Case/RFA/Other and PIN Individual type of slots can only have up to 2 appointments. Please check to see if you have been scheduling more than 2 appointments to slots created with any of the activity codes in the adjacent table:

5. **Location / Office Access** – Ensure that all workers at your agency have the correct location set up on the SMUM screen and have access to all the offices they need access to on the SMWP screen including the office of their default location.

Activity Type Category	CODE	DESCRIPTION
Case/RFA	EH	Eligibility Review/Home
	EO	Eligibility Review/Office
	F1	Postponed FS Interview/Phone
	F2	Postponed FS Interview/No Phone
	IF	ES Intake Interview/Office
	IO	ES Intake Interview/Home
	IP	ES Intake Interview/Phone
	IR	ES Intake Interview/2nd
	MP	ES Intake Interview/ 2nd Phone
	MR	ES Eligibility Review/Mail-In
	PF	Priority Services/FS
	PO	Priority Services/Other
	RN	Renewal/No Phone
	RP	ES Eligibility Review/Phone
Other	FH	Fair Hearing
	VS	Visitor
PIN Individual	AS	Assessment (Individual)
	CO	Counseling (Individual)
	PR	Periodic Review (Individual)
	WI	Work Search Individual

CONTACTS:

BEPS CARES Information & Problem Resolution Center

For W-2 Policy Questions in the Balance of State: Bureau of Regional Operations, W-2 Regional Coordinators.

For W-2 Policy Questions in Milwaukee: Milwaukee Operations Section Regional Administrators.

For W-2 CARES processing Questions: W-2 Help Desk

*Program Categories – FS – FoodShare, MA – Medicaid, BC+ – BadgerCare Plus, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – FoodShare Employment and Training, BC+ Core – BadgerCare Plus Core, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WIA – Workforce Investment Act, Other EP – Other Employment Programs.

DHS/DHCAA/BEPS/LA
DCF/DFES/BWF/JK