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**State of Wisconsin
Governor Scott Walker**

**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, Bureau Director
Bureau of Enrollment Policy & Systems
Division of Health Care Access and Accountability**

BEPS/DFS OPERATIONS MEMO					
No: 13-16					
DATE: 06/18/2013					
FS	<input type="checkbox"/>	MA	<input type="checkbox"/>	BC+	<input type="checkbox"/>
SC	<input type="checkbox"/>	CTS	<input type="checkbox"/>	FSET	<input type="checkbox"/>
BC+ Basic	<input type="checkbox"/>	BC+ CORE	<input type="checkbox"/>		
CC	<input type="checkbox"/>	W-2	<input type="checkbox"/>	EA	<input type="checkbox"/>
CF	<input type="checkbox"/>	JAL	<input type="checkbox"/>	JC	<input type="checkbox"/>
RAP	<input type="checkbox"/>	WIA	<input type="checkbox"/>	Other	<input type="checkbox"/> *
EP					

SUBJECT: Workload Dashboard Enhancements

CROSS REFERENCE: Ops Memo 12-41, Process Help Chapter 53

EFFECTIVE DATE: June 22, 2013

PURPOSE:

The purpose of this Memo is to announce the implementation of the new Workload Dashboard enhancements on June 22, 2013. The Workload Dashboard enhancements have been designed to further support the tracking and reporting of caseload management functions and support the Income Maintenance (IM) Administrative Structure (including Child Care) and W-2 agencies.

BACKGROUND:

The Workload Dashboard Tool allows workers and supervisors to monitor timely case processing, efficiency and accuracy, predict upcoming workload and support increased caseloads and team structures. The Dashboard provides a single summarized view of outstanding work that IM workers (including Child Care) and FEP's are responsible for in order to help them prioritize and complete their work. In addition, the tool consistently measures performance of workers, teams, counties/tribes, consortia, W-2 agencies and the state as a whole. Data from the Workload Dashboard will be utilized to develop future managerial reports.

The Dashboard was piloted in August of 2012, by two consortia (Northern & East Central). Statewide implementation occurred in October of 2012. Since then we have received several suggestions and feedback from the IM Consortia for additional enhancements. The items rated the highest were incorporated into this phase of the project. These enhancements will further extend the capabilities and features of the Dashboard and workload tracking. The remaining items will be considered in a future phase.

POLICY:

There are no policy changes associated with this Ops Memo.

CARES:

“MY DASHBOARD” ON THE CWW HOMEPAGE

Currently, to access their Dashboard, workers must go to the Navigation Menu, under “Worker Tasks” and select ‘Workload Dashboard’.

The CWW Homepage will be updated on June 22, 2013, with a new section, “My Dashboard” to display the worker’s Dashboard. Workers will still be able to access their Dashboard through the “Worker Tools” section of the Navigation Menu.

“My Dashboard” will be located under “Recent Cases/RFAs/ACCESS Applications/Change Reports” on the CWW Homepage. This will provide greater visibility for outstanding Work Items assigned to individual workers. “My Dashboard” will only display a worker’s personal Dashboard. All other Dashboards will remain on the Workload Dashboard page. However, workers can now navigate directly from their home page to the Workload Dashboard page by using the “View Workload Dashboard” button.

Clicking on any of the Work Item counts from “My Dashboard” will take the worker directly to the Work Item Search Results page.

The screenshot shows the CARES Worker Web interface. At the top, there is a navigation bar with the user ID 'XCT142' and name 'J DOE'. Below this is a 'Navigation Menu' on the left and a main content area titled 'CARES Worker Web Home'. The main content area displays a table of 'Recent Cases/RFAs/ACCESS Applications/Change Reports' with columns for Type, Number, Primary Person, and Accessed. Below this is a 'My Dashboard' section containing a 'View Workload Dashboard' button (highlighted with a red box). Underneath the button is a table showing work items categorized by 'Days Left to Complete'.

Work Items Category	Total	Days Left to Complete				
		<1	1-7	8-14	15-30	>30
Applications	3				3	
SMRFs	0					

Work Item Information Panel and Work Item Flag

A new drop down menu listing the work items associated with that case will be added to the Information Panel displayed on individual cases. The Work Item Informational Panel will provide workers with a quick view of all incomplete Work Items for a given case. The display will include a View Icon (magnifying glass), as well as the Due Date, Received Date (*New column*), Category, Type, Worker and the Flag Status (*New column*). Workers will be able to navigate directly to the Work Item Details page as they are navigating through a case’s driver flow, accessing information about specific Work Items.

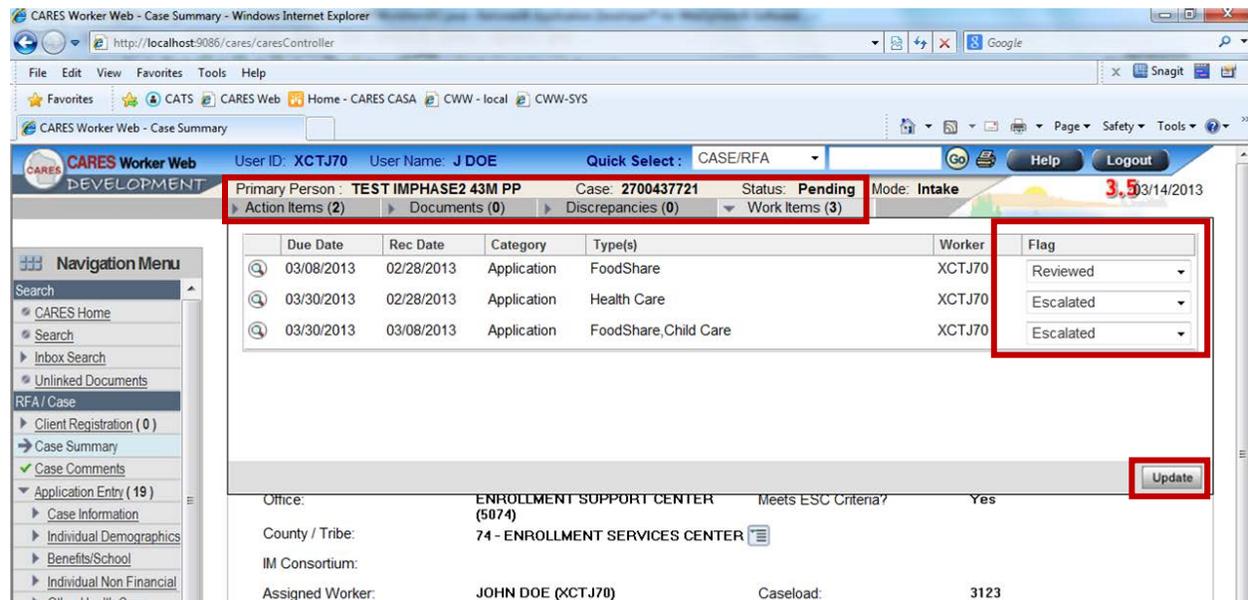
The Received Date is the date that an Application or Six-Month Report Form (SMRF) was received. This will display in the information panel, as well as in the Work Item Details page.

The Work Item Flag will act as a method of categorizing incomplete Work Items. Workers will be able to “Flag” Work Items from the Work Item Information Panel; this will prevent multiple workers from acting on the same Work Items. The flag is information only and will not affect the case or the status of the work item. The following “Flags” will be available:

- **Blank:** The default Work Item Flag, which indicates a Work Item that has not been reviewed or completed.
- **Reviewed:** Set by workers to show that a Work Item has been reviewed, but not yet completed.
- **Escalated:** Indicates that a Work Item may require Supervisor review.
- **Withdraw Requested:** Indicates that a Work Item should be potentially withdrawn.

Clicking the ‘Update’ button will save the updated statuses of the Work Items and collapse the panel. The View will remain expanded until the Work Item tab is minimized, a worker clicks outside of the panel, or the ‘Update’ button is clicked.

The Reviewed flag will be removed when the work item’s due date is <1 day or a change to the case is made. All other flags will remain until manually removed by a worker or when the work item is complete.



It is recommended that each agency define how the flags will be used. A case comment should be entered on the case to document why the specific flag was used.

For Example: When a worker encounters an issue in case processing, he or she can set the Work Item Flag to the “Escalated” value. Clicking “Update” will collapse the panel and save the “Escalated” value as the Work Item Flag. The worker must then document the issue in Case Comments. Supervisors will be able to search for Work Items that have an “Escalated” value by using the Work Item Search criteria. The Case Comment will provide the supervisor with the information needed to research and/or resolve the issue.

WORK ITEMS SEARCH PAGE:

Two new search criteria have been added to the Work Item Search page.

- Received Date
- Work Item Flag

Workers and supervisors will be able to search for Work Items by “Received Date” and/or Work Item Flag.

The screenshot shows the 'Additional Search Criteria' search panel. The 'Received Date' field is highlighted in yellow and has a red box around its options. The options include 'Any', 'Before', and 'Between' with date pickers. Other search criteria include Category, Due Date, Completion Status, Completed / Withdrawn Between, Work Item Flag (with checkboxes for No Flag, Escalated Flag, Reviewed Flag, and Withdraw Requested Flag), and Has related documents?.

For Example: A supervisor may wish to focus on the Work Items that cannot be processed by other workers. These Work Items will be marked with an “Escalated” or “Withdraw Requested” Work Item Flag.

The default search selection of Work Item Flags will include all Flag values. To limit a search to “Escalated” Work Items, workers must un-check all values that do not apply to their search.

Additional Search Criteria

Category:

Due Date: Any

Between and

Received Date: Any Before

Between and

Completion Status:

Completed / Withdrawn Between: and

Work Item Flag: No Flag Escalated Flag

Reviewed Flag Withdraw Requested Flag

Has related documents? (Only applies to cases):

WORK ITEM SEARCH RESULTS PAGE:

The “Received Date” and “Work Item Flag” columns will be added to the Work Item Search Results allowing a worker to sort on the new fields. The Received Date will display as “Oldest First” on the Work Item Search Results.

The “Return” button will be added to the Work Item Search page (when accessed from the Work Item Information Panel), and will also be enhanced for the Caseload Management and Document Management Search pages.

The screenshot shows the 'Work Item Search' page in the CARES Worker Web. The top navigation bar includes the user ID 'XCTI42' and name 'J DOE'. The 'Quick Select' dropdown is set to 'CASE/RFA'. The search results table has the following columns: APP/RFA/Case, Flag, Primary Worker, Category, Work Item Owner, Received Date, Type, Status, and Due Date. Three results are listed:

APP/RFA/Case	Flag	Primary Worker	Category	Work Item Owner	Received Date	Type	Status	Due Date
Case - 6700437768	Withdraw Requested	XCT752	Application	XCTI42	03/01/2013	W-2	Case Processing	03/31/2013
RFA - 7700437777	Escalated	XCT752	Application	XCTI42	03/01/2013	Child Care	RFA Processing	03/31/2013
RFA - 0700437908		XCTI42	Application	XCTI42	03/14/2013	W-2	RFA Processing	04/13/2013

Below the table, there is a 'Reassign' button and a 'Return' button. Red arrows in the original image point to the 'Flag' and 'Received Date' columns and the 'Return' button.

WORK ITEM DETAILS PAGE

The Work Item Details page will now retain a history of any updates made to the Work Item Flag, showing a Date/Timestamp and the Worker ID of the worker that updated the flag value. A supervisor will be able to identify when the Work Item was “Escalated” and the Worker ID that “Escalated” the Work Item.

The screenshot shows the 'Work Item Details' page for Case - 5002144454. The 'Work Item History' section contains the following entry, which is highlighted with a red box:

6. Work Item Flag Updated on 04/16/2013 at 3:26 PM by XCTV51

Below this entry, there are two 'Work Item Details' tables. The first table shows the current state of the work item:

APP/RFA/Case	Flag	Caseload Owner	Work Item Owner	County	IM Consortium
Case - 5002144454	Reviewed	XCTN16	XCTN91	MILWAUKEE COUNTY	STATE CONSORTIUM

The second table shows the state of the work item when it was reassigned on 01/10/2013:

APP/RFA/Case	Flag	Caseload Owner	Work Item Owner	County	IM Consortium
Case - 5002144454		XCTN16	XCTN91	MILWAUKEE COUNTY	STATE CONSORTIUM

Below this, another history entry is visible:

4. Work Item Reassigned on 01/02/2013 at 11:01 AM by XCTN06

“Save Search Criteria” and “Restore to Default Search Criteria” functions will be added to the Work Item Details page.

This function will work similarly to the “Save Search Criteria” on the Caseload Management page, and will include a “Restore to Default Search Criteria” button.

If a saved search includes a Team that has been deleted, CWW will display an error message to inform the worker to select a new team and re-save their search criteria.

The screenshot shows the CARES Worker Web interface. At the top, the user ID is JX2189 and the user name is G ANNYAPU. The quick select is set to CASE/RFA. The date is 03/14/2013. The navigation menu on the left includes options like Search, Unsubmitted Requests, Inboxes, and various RFA/Case management tools. The main content area is titled "Work Item Search" and contains a message: "The following events have occurred: WT146: Team Ram Test 1 - MILWAUKEE COUNTY is no longer valid. Please select a new team and re-save search criteria." Below this message are two buttons: "Restore to Default Search Criteria" and "Save Search Criteria", which are highlighted with a red box. The search criteria configuration area shows options for searching by IM Consortium, County / Tribe or Team, Work Item Owner, Primary Worker or Caseload, or Case, RFA or ACCESS Tracking Number. The selected criteria is "By IM Consortium, County / Tribe or Team" with "County / Tribe" set to "40 - MILWAUKEE COUNTY" and "Narrow Further?" set to "Yes, By Teams". A list of teams is shown, including "Ram Test 10 - MILWAUKEE COUNTY", "999 - MILWAUKEE COUNTY", and "EFAEDFADDF - MILWAUKEE COUNTY".

RETURN TO SEARCH RESULTS FUNCTIONALITY

A “Return to Search Results” button will be added to the Work Item Search Results and enhanced for Caseload Management and Document Management Search Results. The button will appear on the Navigation Menu with the title of the page from the last search performed.

The “Return to Search Results” button will automatically clear from the Caseload, Document Management and Work Item Search Criteria pages when:

- The “Return to Search Results” button is clicked.
- Navigating back to the Work Item Search, Caseload Management Page, or Document Management criteria/results pages.
- The ‘X’ on the bottom right of the button is clicked.
- Logging out of CWW and/or a new session is started.

WORK ITEM ASSIGNMENT AGENCY PREFERENCES

Each agency will control how the Dashboard automatically assigns/reassigns work items in their agency as various steps in the Application and SMRF processes are completed (Primary Worker vs. worker who performed the last action).

The system generates and assigns/re-assigns Work Items for the following actions:

- ACCESS Application Became an RFA
- ACCESS Application Linked to a Case
- RFA Merged with Case
- RFA Became a Case
- Group Level Program Request Added
- Group Level Program Request Processed
- Program Request Add to Case
- SMRF Driver Initiated

Previously, for each of these actions, Work Items were automatically assigned to the Signed-In Worker processing the case. Worker assignments were configured the same way for all workers State-Wide. Consortia can now set their own preferences for each of the above actions, determining whether Work Items are assigned to the Signed-In or Primary Workers.

Certain Work Items, such as those containing a W-2 Work Item Type, will always be defaulted to a Signed-In Worker.

The screenshot shows the CARES Worker Web interface in a Windows Internet Explorer browser. The top navigation bar includes the CARES logo, 'CARES Worker Web SYSTEMS', 'User ID: XCTV51', 'User Name: J VAUGHAN', a 'Quick Select' dropdown menu set to 'CASE/RFA', and buttons for 'Go', 'Help', and 'Logout'. The date '04/23/2013' is displayed in the top right corner. On the left is a 'Navigation Menu' with options like 'CARES Home', 'Search', 'Inbox Search', 'Unlinked Documents', 'RFA / Case', 'Client Registration (0)', 'Case Summary', 'Case Comments', 'Expected Changes', 'Application Entry (16)', 'Case Information', and 'Individual Demographics'. The main area is titled 'Work Item Search' and contains a 'Criteria' section and a 'Results' table. The 'Results' table has columns for 'APP/RFA/Case', 'Flag', 'Primary Worker', 'Category', 'Work Item Owner', 'Received Date', 'Type', 'Status', and 'Due Date'. A single result is shown for 'RFA - 2002257329' with 'Primary Worker' XCTM52, 'Category' Application, 'Work Item Owner' XCTM52, 'Received Date' 04/19/2013, 'Type' FoodShare, 'Status' RFA Processing, and 'Due Date' 05/19/2013. A 'Reassign' button is located below the table.

APP/RFA/Case	Flag	Primary Worker	Category	Work Item Owner	Received Date	Type	Status	Due Date
RFA - 2002257329		XCTM52	Application	XCTM52	04/19/2013	FoodShare	RFA Processing	05/19/2013

W-2

Please refer to Operations Memo 13-22: Workload Dashboard Enhancements for Wisconsin Works (W-2) Agencies.

CONTACTS:

BEPS CARES Information & Problem Resolution Center

*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/CC