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Division of Medicaid Services

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Date: February 16, 2018   DMS Operations Memo 18-06

To: Income Maintenance Supervisors
          Income Maintenance Lead Workers
          Income Maintenance Staff
          W-2 Agencies
          Workforce Development Board
          Job Center Leads and Mangers
          Child Care Coordinators

Affected Programs:	
☒ BadgerCare Plus	☒ Caretaker Supplement
☒ FoodShare	☒ FoodShare Employment
☒ Medicaid	and Training
☒ SeniorCare	

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          Bureau of Enrollment Policy and Systems
          Division of Medicaid Services

CARES Worker Web Documents on the Dashboard

CROSS REFERENCE

- Operations Memos 15-J2, 15-33, and 16-26
- Process Help, Section 45.2 CWW Document Viewer and Chapter 53 Workload Dashboard
- Electronic Case File Handbook, Chapter 1 Using the ECF

EFFECTIVE DATE

March 3, 2018

PURPOSE

This Operations Memo announces new functionality to the CARES Worker Web (CWW) Workload Dashboard to track documents as work items.

BACKGROUND

The Wisconsin Department of Health Services (DHS) is engaged in an ongoing effort to update CARES to accommodate the consortia models and the various workflows of each consortium. The long-term goal of these changes is to provide agencies with flexible tools to manage their workload and efficiently complete workload items, as well as to provide agency management with accurate, up-to-date information needed to make informed, data-driven decisions about operations and staff.

One of the needs identified by the Income Maintenance Operational Analysis (IMOA) subcommittee is to efficiently assign and monitor work items at a more granular level than is currently available. Monitoring and assigning specific elements of work (for example, documents, changes, and alerts) to

individual workers without affecting the case-level assignment presents a challenge. As a result of input from the consortia and Milwaukee Enrollment Services (MilES), DHS will prioritize the ability to better track and assign unprocessed documents.

On March 3, 2018, DHS will enhance the Workload Dashboard to include documents.

POLICY

There is no change in policy associated with this Memo.

Note: The CWW functionality and processes described in this Memo do not change the requirement that workers process documents according to program policy. (For requirements related to timely processing of documents for FoodShare, see [FoodShare Wisconsin Handbook, Section 6.1.3.1 Processing Reported Changes](#)).

CARES

SUMMARY OF CHANGES

The CWW Workload Dashboard will be updated as follows:
- When a document is scanned, indexed, and validated, a work item will be created for each document assignment.
- CARES will assign the work item(s) to the appropriate worker according to the routing rules of the office.
- Workers will be able to view their document assignments and work items on their dashboard, which can be accessed from the CWW Home page, the Workload Dashboard link on the Navigation Menu, and the Work Item Search page.
- It will be possible to reassign document work items just like other work items can be reassigned today.

The Workload Dashboard will display the document work item statuses "Received" and "Waiting." When a document is assigned to a worker, the corresponding work item will have a 10-calendar-day due date and will be added to the documents category on the dashboard in the 8-14 Days Left to Complete column. The work item is completed by moving the document to the Electronic Case File (ECF). A document work item will also be removed from a worker's dashboard if the worker deletes the document or if the document is reassigned to another worker. When a document is reassigned to another worker, the due date will remain the originally assigned due date and only the work item owner will be changed.

There is an exception to this rule for case transfers. When a case is transferred, all document work items will be deleted, and new document assignment work items will be created based on the routing rules of the document's office. This applies to cases transferred using the Case Transfer page, within a consortium or from one consortium to another.

WORKLOAD DASHBOARD

A new work item category, Documents, will be added to the Workload Dashboard. This 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 and due date, will be displayed. The

dashboard will organize the display of unprocessed document work items by the number of days remaining to complete. Workers can click an unprocessed document work item link to navigate to the Work Item Search page.
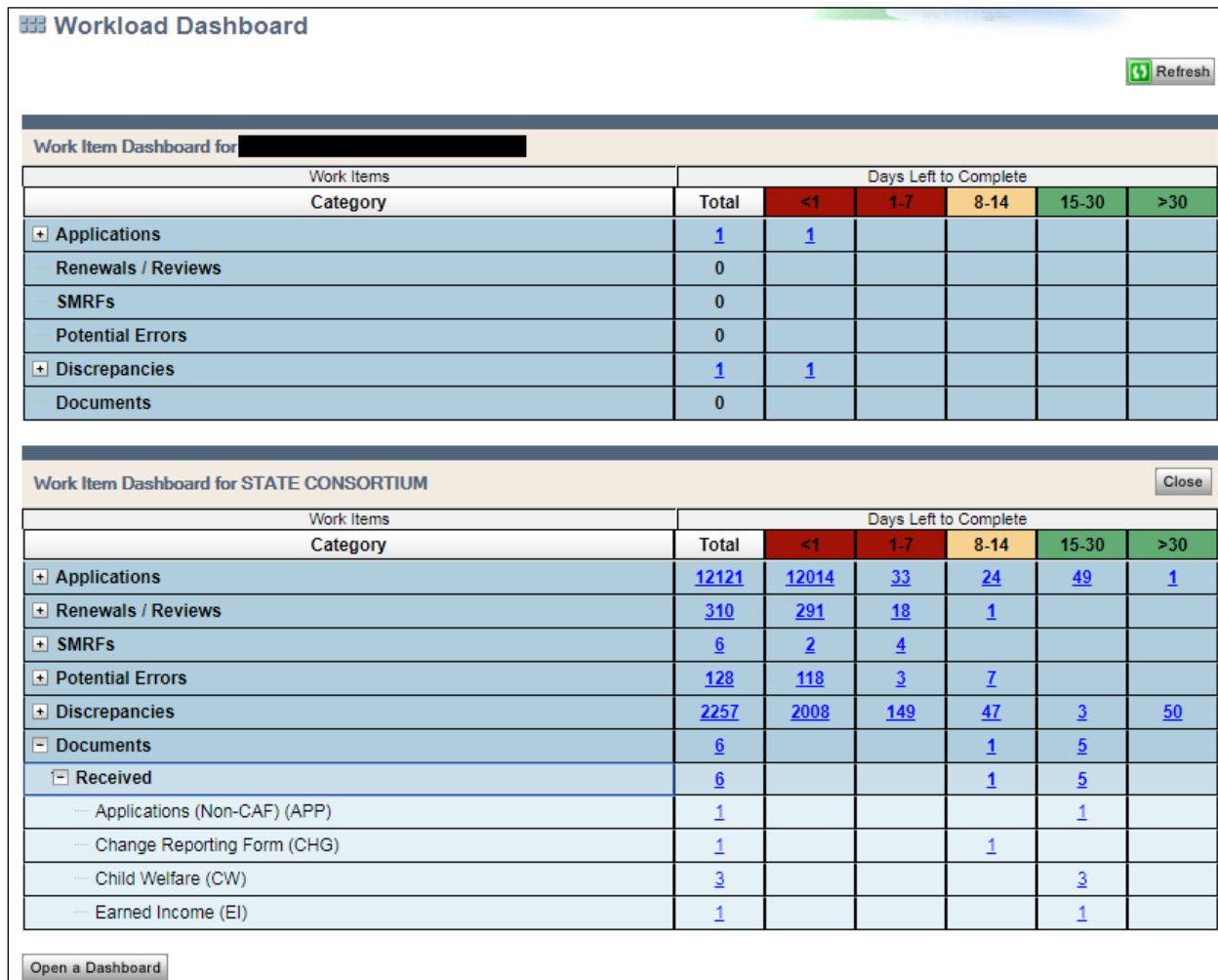

Figure 1 CWW Workload Dashboard Showing Documents Category

DOCUMENT WORK ITEM STATUS

The document work item status indicates the status of the document as described in the table below. When a document is deleted or completed and moved to the ECF, the work item is removed from the Workload Dashboard.

Document Status	Status Definition
Received	A document that has been received, validated, and assigned to a worker.
Waiting	A document that requires follow up by the member or worker.
Move to Case File	A document that is moved to the ECF by the worker. (**Note:** This status does not appear in the Workload Dashboard.)
Withdrawn	A document that is deleted or a document assignment that is removed. (**Note:** This status does not appear in the Workload Dashboard.)

WORK ITEM SEARCH PAGE

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 workers to search for documents by the following criteria:

- Status
- Type
- Special attention
- Due date
- Received date
- Completion status
- Completion or withdrawal date
- Work item flag

Figure 2 Work Item Search Page Showing Document Category

WORK ITEM DETAILS PAGE

A new category, Documents, will be added to the "Work Item Details" section of the Work Item Search Details page and will display the following document details:

- Work item ID
- Associated with case
- Category
- Special attention
- ACCESS/RFA/Case
- Flag
- Primary worker
- Work item owner
- County
- IM consortium
- Type of document
- Status
- Due date
- Begin date
- End date
- End reason
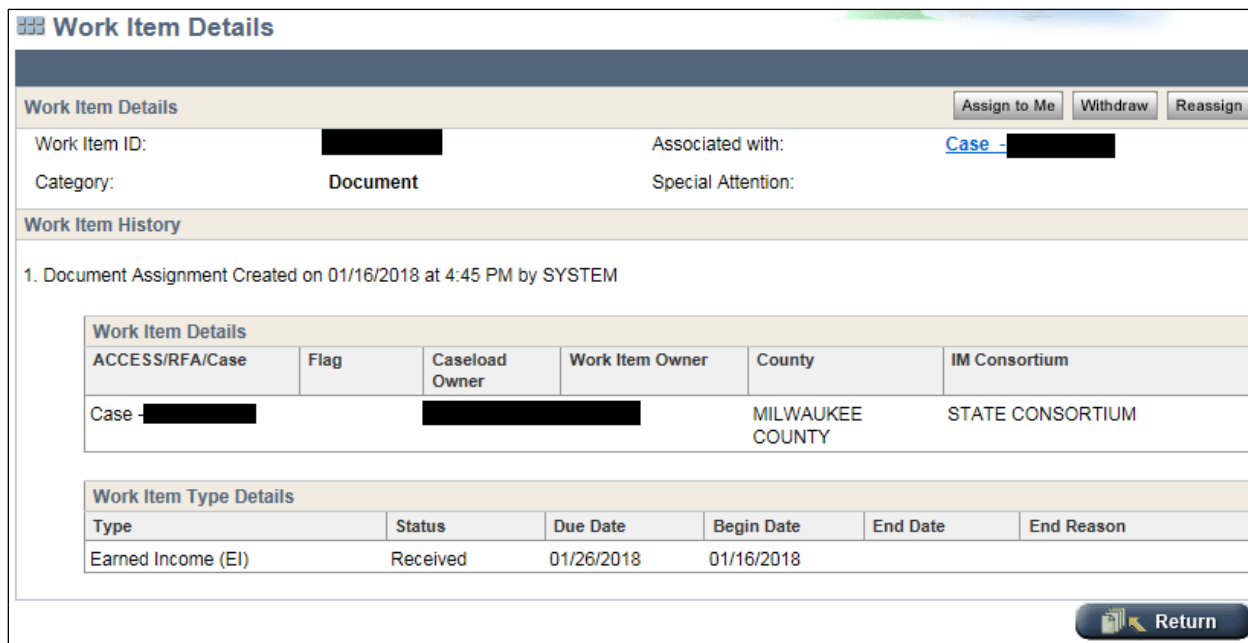
Figure 3 Work Item Details Page Showing Document Category

REASSIGN WORK ITEMS PAGE

A new category, Documents, will be added to the "Work Items to Reassign" section of the Reassign Work Items page. The Reassign Work Items page will display the following document details:

- Work item ID
- ACCESS/RFA/Case number
- Caseload owner

- Category
- Work item owner

To reassign a document work item, workers must have:
- Security level 50 or greater
- Update access for the office of the case
- Appropriate Wisconsin Integrated Security Application (WISA) profile access

Figure 4 Reassign Work Items Page Showing Documents Category

Document work items will be created or deleted on the Workload Dashboard based on document routing rules. When a case is transferred, all document work items will be deleted, and new document work items will be created based on the routing rules of the document's office. This applies to cases transferred using the Case Transfer page, within a consortium or from one consortium to another.

DOCUMENT VIEWER

Document work items on the Workload Dashboard automatically update to display the status of documents that have been merged, split, or duplicated in the Document Viewer. If documents are deleted using the Document Viewer, the corresponding work items will be automatically deleted from the Workload Dashboard. For more information about using the Document Viewer, refer to Process Help, Section 45.2 CWW Document Viewer.

MERGING DOCUMENTS THAT ARE ASSIGNED TO THE SAME WORKER

A worker can combine documents that are assigned to the worker by dragging a document onto another document using the Document Viewer. The work item for the dragged document is deleted from the Workload Dashboard and the resulting combined document will indicate that it is a merged document in the Workload Dashboard. If the status of either or both documents is Waiting, the status of the merged document will be Waiting.

The merged document will have the received date of the more recently received document being combined. This received date will be used to calculate the due date of the merged document.

Example 1: A worker was assigned Document 1 on January 16, 2018, and Document 2 (with the status of Waiting) on January 29, 2018. The worker merged the documents by dragging Document 2 onto Document 1 in the Document Viewer. The resulting combined document is assigned to the worker (with the status of Waiting) with a due date of February 8, 2018, and the work item for Document 2 is deleted from the worker's dashboard.

Figure 5 Assigned Document Work Item Prior to Merge

Figure 6 Second Assigned Document Work Item Prior to Merge

Figure 7 Merged Document Work Item

MERGING DOCUMENTS THAT BELONG TO DIFFERENT WORKERS

When documents assigned to different workers are merged, the work item for each worker will be updated on the workers' Workload Dashboards to indicate that it is a merged document. The merged document will have the received date of the more recently received document being merged. This received date will be used to calculate the due date of the merged document.

Example 2: Mary is assigned Document 1, with the status of Waiting, on February 5, 2018. LaTanya is assigned Document 2 on February 13, 2018. LaTanya finds that additional information is needed from the member before she can process Document 2 and changes the status from Received to Waiting. Mary then merges Document 1 onto Document 2 in the Document Viewer. After the merger, the work item for Document 1 is removed from Mary's dashboard, and the work item for Document 2 is displayed on both Mary's and LaTanya's dashboards with a status of Waiting and a due date of February 23, 2018.

SPLITTING A DOCUMENT

When a document is split, a new document will be created and will have the same assignments as the original document. The new work item will have the type UNKNOWN (UN), and will have the same status, received date, and due date as the original document before it was split.

Figure 8 Assigned Document Work Item Before Split

Figure 9 Split Document With Type Unknown Document (UN)

DUPLICATING A DOCUMENT

When a worker duplicates a document in the Document Viewer, a new work item will be created on the worker's Workload Dashboard for the duplicate document. The duplicate document will have the same assignments, document type, status, received date, and due date as the original document.

DISCARDING A DOCUMENT

When a worker discards a document in the Document Viewer, it is moved to the Document Viewer recycle bin, and work items associated with the document are removed from the Workload Dashboard. If the worker restores the document from the Document Viewer recycle bin, a new document work

item(s) will be created with the same worker assignment, begin date, due date, and status that it had prior to being deleted.

MOVING A DOCUMENT ASSIGNMENT TO A CASE FILE

When a worker changes a document assignment status to Move to Case File in the Document Viewer and clicks Enter or Next, the work item is completed and removed from the worker's Workload Dashboard. The worker's Workload Dashboard displays only documents that have a status of Waiting or Received. Documents that a worker cannot move will remain on the Document Viewer and case and will remain as work items in the worker's dashboard.

Note: If necessary, workers can withdraw documents that cannot be moved.

REMOVING A DOCUMENT WORK ITEM ASSIGNMENT

When a worker sets a document assignment status in the Document Viewer to Remove Assignment, the work item is withdrawn from the worker's Workload Dashboard.

DOCUMENT CONVERSION

A one-time conversion will be performed on March 3, 2018, to add document assignments to the Workload Dashboard. Documents received prior to December 1, 2017, will need to be manually assigned.

Unprocessed documents assigned to a group, received between December 1, 2017 and March 2, 2018, and linked to a case, will be automatically added to the Workload Dashboard. Group Assignments will be eliminated. All converted documents will be assigned to a worker ID selected by the consortium prior to conversion. See the table below for details about the automatic addition of document assignments to the Workload Dashboard.

Document Linked to Case	Document Received Date	Result in Workload Dashboard
Yes	December 1, 2017–March 2, 2018	Automatically added
Yes	Prior to December 1, 2017	Not added
Yes	After March 2, 2018	Automatically added
No	Any	Not added

WORKLOAD DASHBOARD DUE DATES

After document conversion, all documents added to the Workload Dashboard are automatically due 10 calendar days after the received date.

Note: These dashboard due dates are not based on case or policy requirements. Instead, these due dates are only intended for tracking workload assignments on the dashboard. Workers must ensure that documents are processed according to program policy requirements. Documents that are added to the Workload Dashboard in the March 3, 2018, conversion will have a Workload Dashboard due date of March 15, 2018.

> **Example 3:** An application is received and processed on March 8, 2018. The worker pends the application for verification, due March 27, 2018. If that verification is received on March 23, 2018, the document's due date on the workload dashboard will be April 3, 2018 (10 calendar days from receipt). However, verification is actually due March 27, 2018, so the verification must be processed by March 27, 2018, (within the application processing timeframe) to not delay the application.

CONTACTS

BEPS CARES Information and Problem Resolution Center

DHS/DMS/BEPS/PM