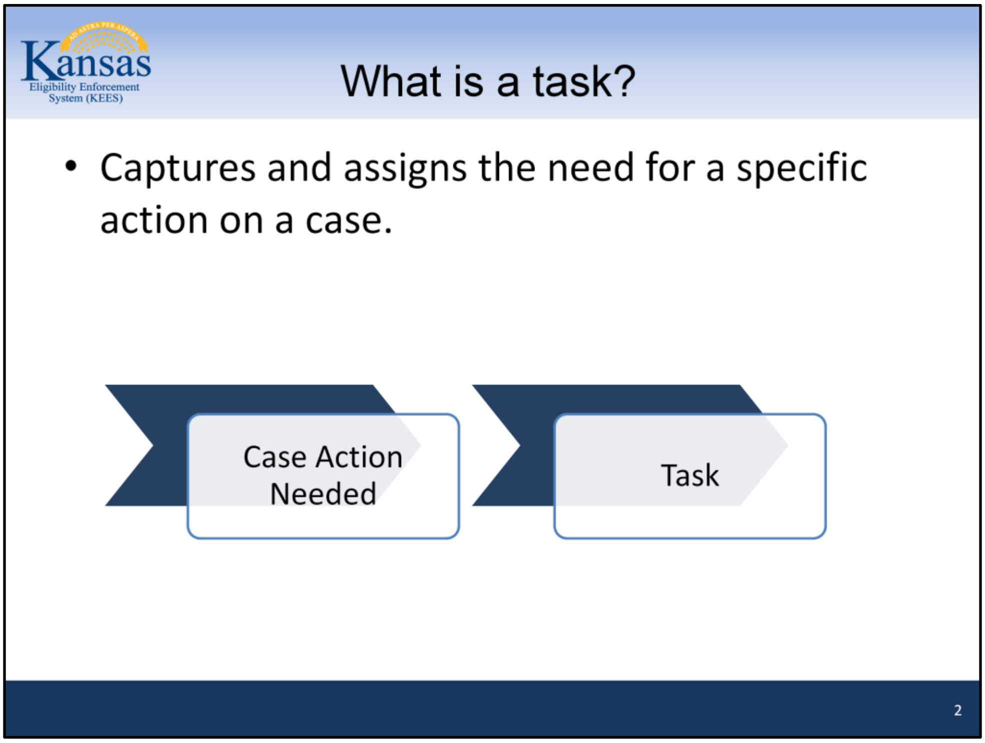
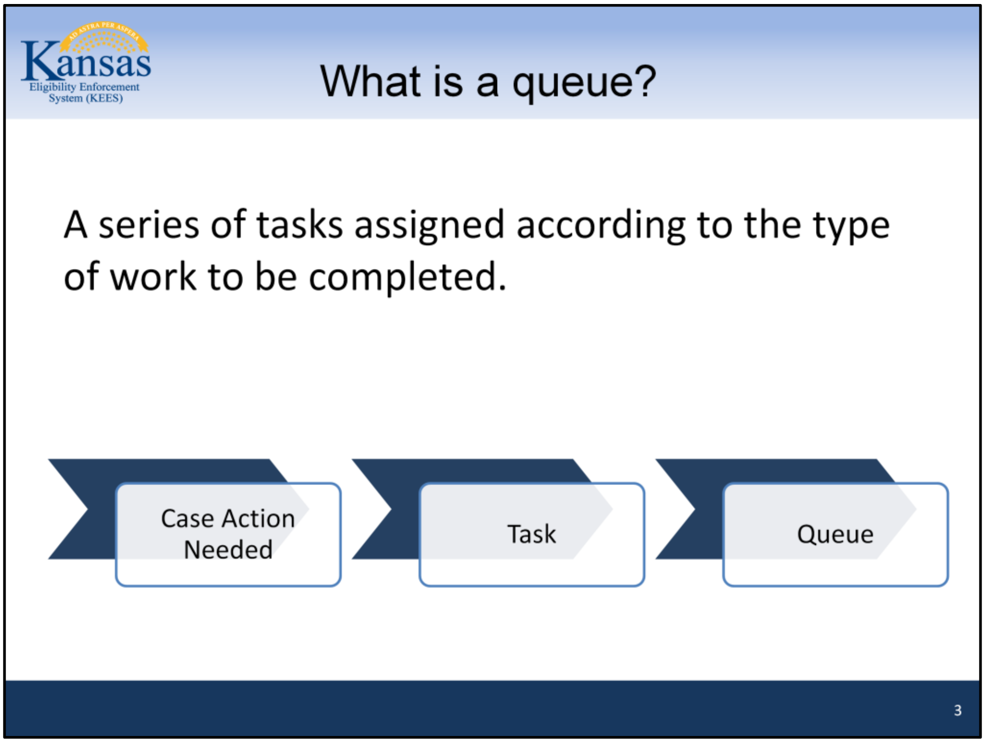
Working with Tasks

1

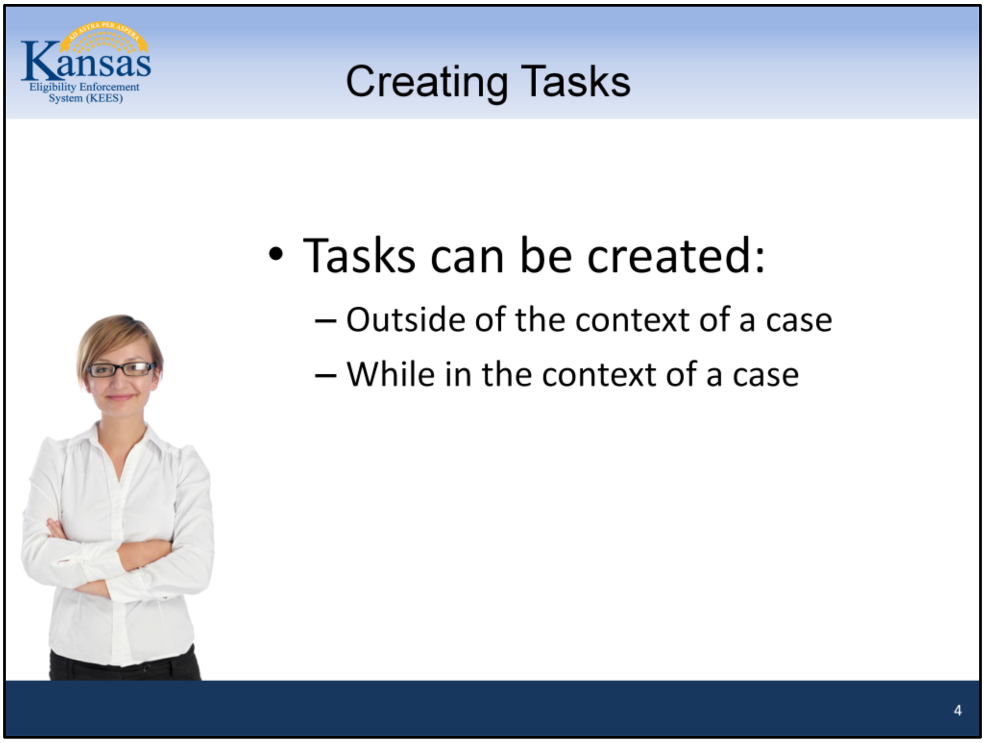
Welcome to Working with Tasks.
Let’s talk about why we are here.
In KEES, the Task Inventory will be replacing what today is known as the “Tracker”.



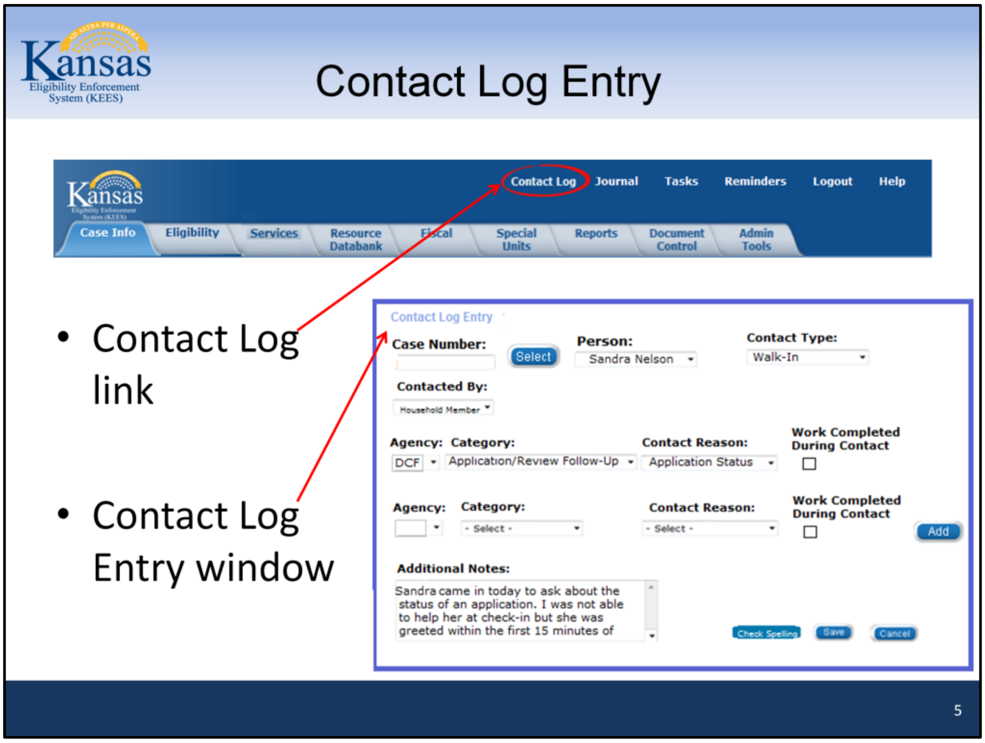
- We are going to start off with some basic concepts.
- A task captures and assigns the need for a specific action on a case.
- Today, a task is an action that you claim off of the Tracker.
- Applications, Reviews, IRs, and Changes are all actions that create a task on the Tracker today. This will not change with KEES.
- Interfaces and Images can are new actions that could trigger a task in KEES.
    - Interface example: Today, workers receive an alert on WOAL when Social Security stops/ends. KEES will receive this same information in the form of a task that will be assigned to a queue to be worked.



- A Queue = your Team Color or Color Track
- A queue is a series or bucket of tasks assigned according to the type of work to be performed.
- In addition to seeing color queues like on the Tracker today, you'll also see some new queues with KEES. For example:
    - Quality Assurance
    - Supervisor
    - Administrative
    - Work Programs
    - Etc.



- **Trainer Note: Ask audience what it means to be in the context of a case and how you can tell if you are in the context of a case**
    - Answer: You are actively looking at screens in KEES related to a specific case
    - Show audience where the case name and case number appear to the left of the utility navigation bar. Use the system or a screen shot to show this information.
- It's important to know tasks can be created both outside and while in the context of a case. Meaning, tasks don't have to be associated to a specific case number to be created.
- There are several tools that can be used to create and claim tasks in KEES. The first tool we will discuss is the Contact Log.

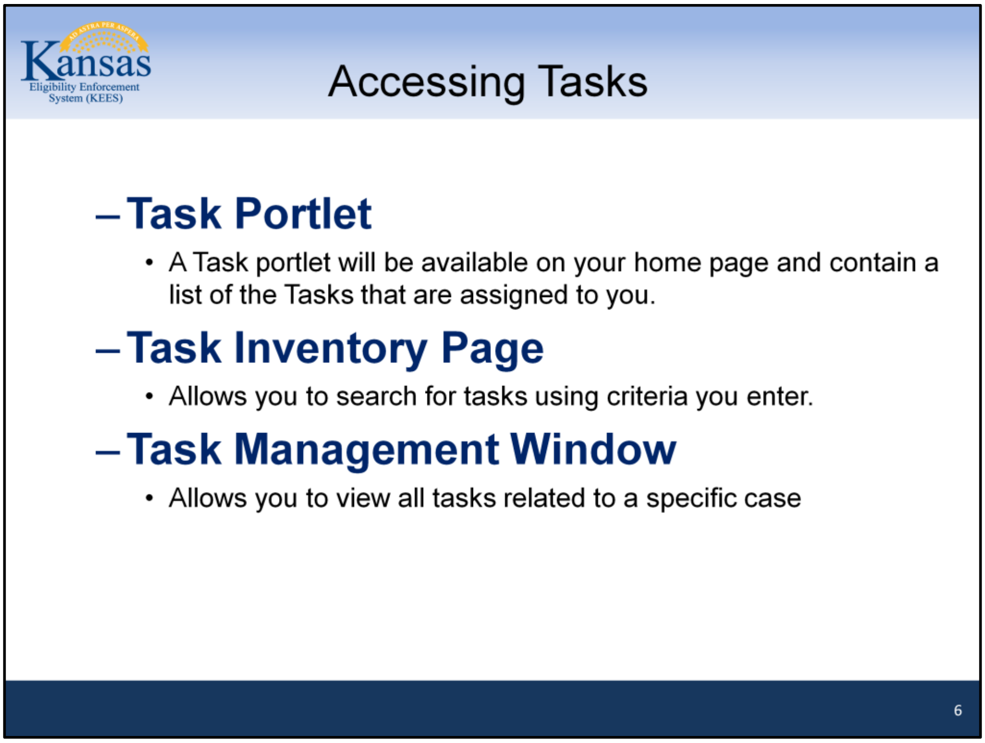


- **Training Note: Navigate to the Contact Log in the Training Environment. The contact log can be found on the Utility Navigation bar—ask the audience to name this bar.**
  - Direction for navigating in the system:
    - The Contact Log link is in the Utility Navigation bar.
    - Click the Contact Log link to open the Contact Log entry screen. A separate pop-up window will display the Contact Log Entry screen.
- **The Contact Log is similar to the “Add New Client Request” button on our current tracker.**
- It will be used primarily by the Greeter and is the tool used for creating tasks for contact made with Consumers through the Lobby, but can also be used for non-lobby tasks as well.
- It captures information such as case number, contact type, contact reason, who made contact (for example: a household member or an employer with information on a case).
- Applications and the corresponding programs are entered through Category and Contact Reason. KEES uses this information to automatically create a task and assign it to the correct color queue.
- For Phase 2, the Case Number field will only support a KEES Case Number.
    - Trainer Note: Ask the audience which programs will have a KEES Case Number
    - Answer: Medical

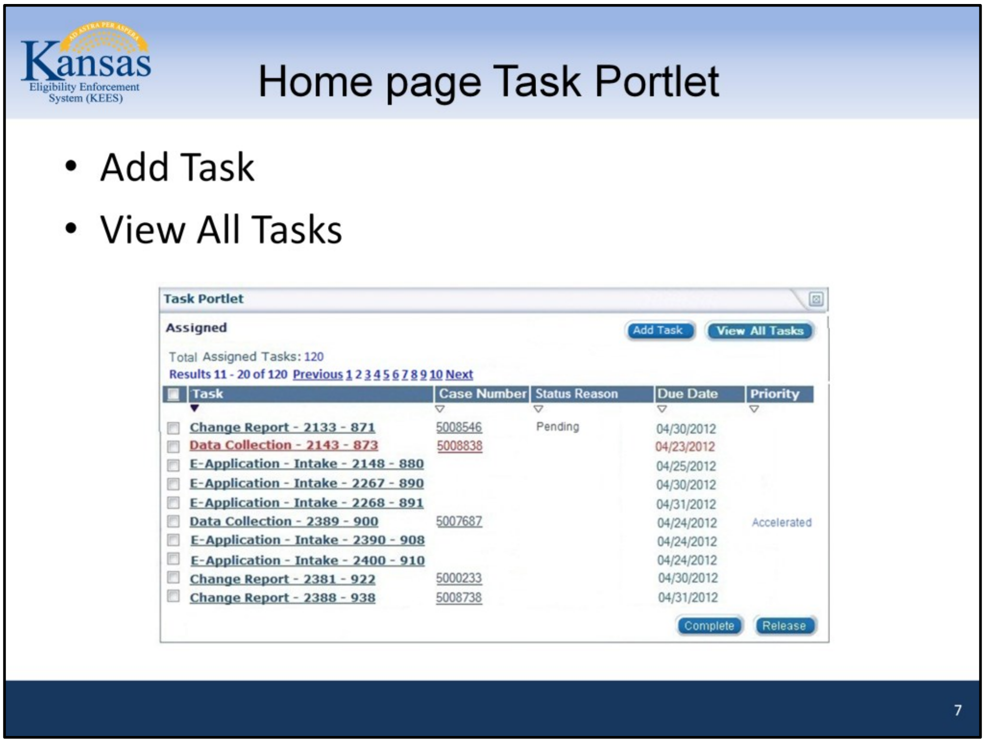
- When a case number is entered in this field, the system validates the case number is accurate. If a KAECSES/KSCares case number is entered, the user will receive a system error.
- Greeters are being instructed to enter the KAECSES/KSCares case number in the additional notes.
  - What this means for caseworkers: When you go to claim a non-medical task, a case number will not be associated to the task. You'll have to open the task to see the non-medical case number.
  - Advantage to this: For most situations, tasks with a case number is how the field will determine if a task represents a case that has medical work to be completed. Staff who HAVE NOT been trained to work medical programs in KEES can search, filter, and sort for tasks with no case number to claim. We will learn how to sort and filter in just a minute.

- **Note**: For Phase 2 of KEES, DCF will only use the contact log as a method to create tasks for the team queues. During Phase 2, the Contact Log will NOT replace the regional phone trackers.

- Now that you have seen the contact log, which is one way of creating Tasks, we will go through the different ways to access tasks.



- Today, you have 1 one way to access your tasks: The Tracker. With KEES, there are three main ways to access your Tasks.
    - The Task Portlet
    - Task Inventory Page
    - Task Management Window
- Next, we are going to take a deeper dive into each of these access points.



- ***Trainer's note: Show staff where the Task Portlet is located using the Training Region.***

- ***One*** option for viewing tasks is the Task portlet that is available on the KEES Home page after you are logged in. This portlet shows tasks that are currently assigned to you, **which, compared to the current tracker, makes catching cases that staff have claimed but not updated simpler to see and fix.**
- Clicking the Add Task button will open a pop up window for Manual Task – No Case information to be entered.
- Clicking inside the box to the left of the Task title will mark that particular task to either be Completed or Released.
  - Click the Complete button if that particular task is finished- ***suggest not using since it doesn't allow a Status Reason update***
    - ***Trainer Note: Tell staff they'll see the complete button in several locations. Remember, the Clearinghouse is using this system as well, and they have different business needs. We are directing DCF staff to use the complete button on the Task Detail screen, which they will learn about later in the presentation.***
  - Click the Release button if you need to release the task from your queue and send it to another queue.
    - ***The release button should be used when a user has not been trained on KEES and an active KEES case is available or if other tasks***

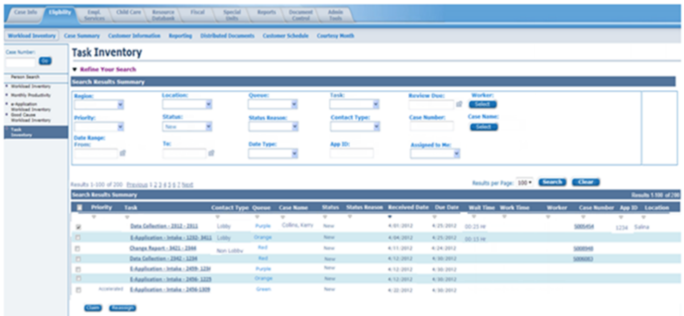
attached to a client's case have already been assigned. This button should not be used to avoid complicated cases (cherry picking).

- The Task Portlet is a GREAT place to make sure you have not been assigned a task in error. Use this page to review your tasks, making sure that there are not tasks that have not been updated to complete. You should check this periodically through-out the day and every night before logging out.
- The Task Portlet can be used much like you currently 'clean up' the tracker.
- ***Since we work one case at a time in BPM, make sure all previous tasks are updated . Once all tasks have been updated, click*** on ***the*** View All Tasks button ***to*** open the Task Inventory page on the Eligibility Tab in KEES.

Kansas
Eligibility Enforcement System (KEES)

Task Inventory

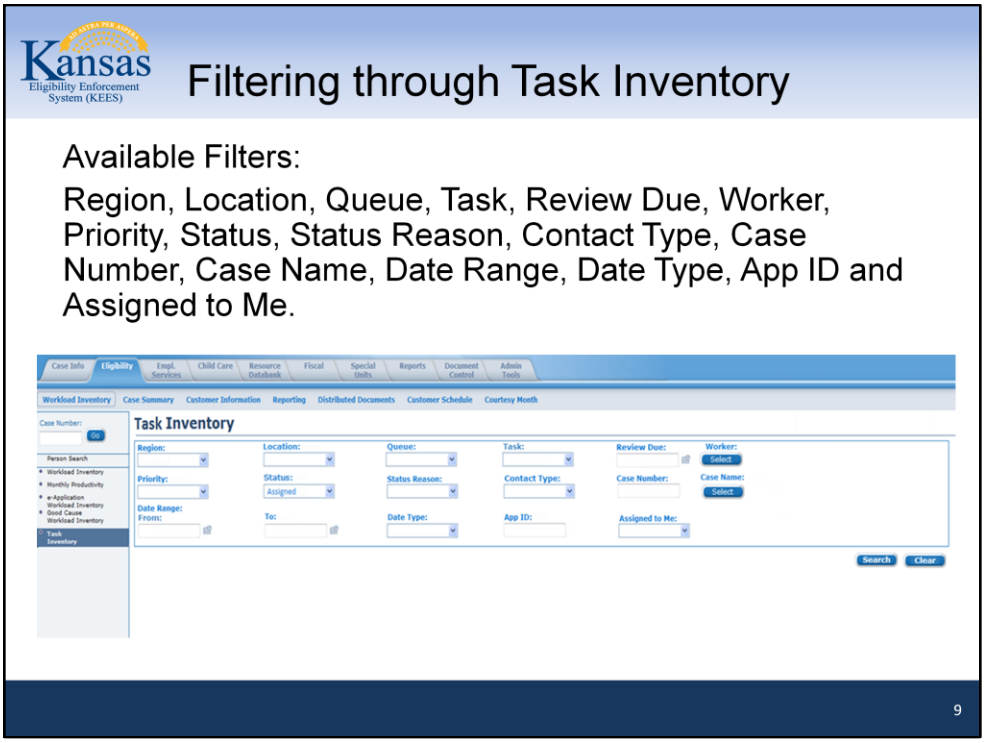
- Used to sort and filter tasks.
- Claim unfinished work.



8

- ***Trainer's Note- show staff in training region how to access task inventory through the Task Portlet by clicking on view all button.***
    - ***Also, show them they have to click on "Refine Your Search" for the Filters to appear.***

- The Task Inventory page is used to see unfinished work.
- It is a shared screen with the Clearinghouse. As a result, there will be columns that do not have the same importance to DCF as they do to the Clearinghouse.
- The overall design of the Task Inventory was done to have the same functions as the tracker. Look and feel will be different but the process is similar. **This screen compares to the claim color/action buttons on the current tracker.**



- On the Task Inventory page, the worker can apply filters to narrow the list of tasks displayed to find the specific type of tasks that they want to claim.
- Task results can also be sorted by column using carets as needed to aid in finding the correct task to be claimed.
- ***The Region, Location, Queue, and Task drop down menus are dynamic fields. Discuss "dynamic."***

- ***Trainer's Note: Use the example of work an IR in the office training is provided to walk through on training region how dynamic fields work from Region to Task. Currently, the dynamic fields do not work, so discussion of what will be there is important. (Example: IR in Phillipsburg requires Region (DCF West), Location (Phillipsburg), Queue (Blue), and Task (IR).***

Region selections will be:
- DCF East
- DCF West
- DCF Wichita
- DCF Kansas City
- KDHE Clearinghouse
- KDHE Outstationed

Location will be the Office Locations. For example: Atchison Service Center, Great Bend

Service Center or Hutchinson Service Center to name a few.

Queue will be:
- Administrative
- Blue
- Green
- Orange
- Orange / Blue
- Orange / Green
- Orange / Purple
- Purple
- PPS (this queue will not be used for P2 – DO NOT use it)
- Q & A
- Red
- Supervisor
- Work Program

Status will need to be set to "New" when claiming an unassigned task.
- ***Discuss 4 possible Statuses- New, Assigned, Completed, and Rejected***
  - ***New: A task has not been claimed.***
  - ***Assigned: A task has been claimed***
  - ***Complete: A task has been processed.***
  - ***Rejected: A task has been voided. Voiding tasks will be discussed later in this training.***
- ***Status Reason vs. Statuses***
  - ***<u>No show</u> – An interview was attempted but we were unable to complete. Examples of no show include for the nonlobby and orange an unsuccessful cold call attempt or in the lobby when the client leaves the office before being called to the interview. In the case of an application where multiple programs have been applied for no show indicates the cold call was unsuccessful and the agency was unable to complete the interview and any additional program requests pend for verification, including information from a third party or any additional program is processed where an approval or denial is made.***
  - ***<u>Pended</u> – The task has been worked as far as possible and the clients request has not been resolved. Pended work is an indication there will be at least one or more contacts with the client. In the case of an application, pending indicates we were unable to approve or deny any <u>one</u> of the programs applied for.***
  - ***<u>Complete</u> – The task has been finished and the client's request has been resolved. The client will need no further contact with the agency related to this request. In the case of an application, the worker has either approved***

or denied <u>all</u> programs applied for. In the case of a reported or known change, the worker has completed the change on the case and made an eligibility determination for all programs. Partial approval could result in additional contacts from the client requesting information about the status of their request. <u>(Pay special attention to complete, since it is a Status and a Status Reason)</u>

Contact Type will filter between lobby vs. non-lobby. To view lobby, select Lobby from the Contact Type . To view non-lobby, leave the contact type blank and use the Contact Type caret below. Refer to Handout.

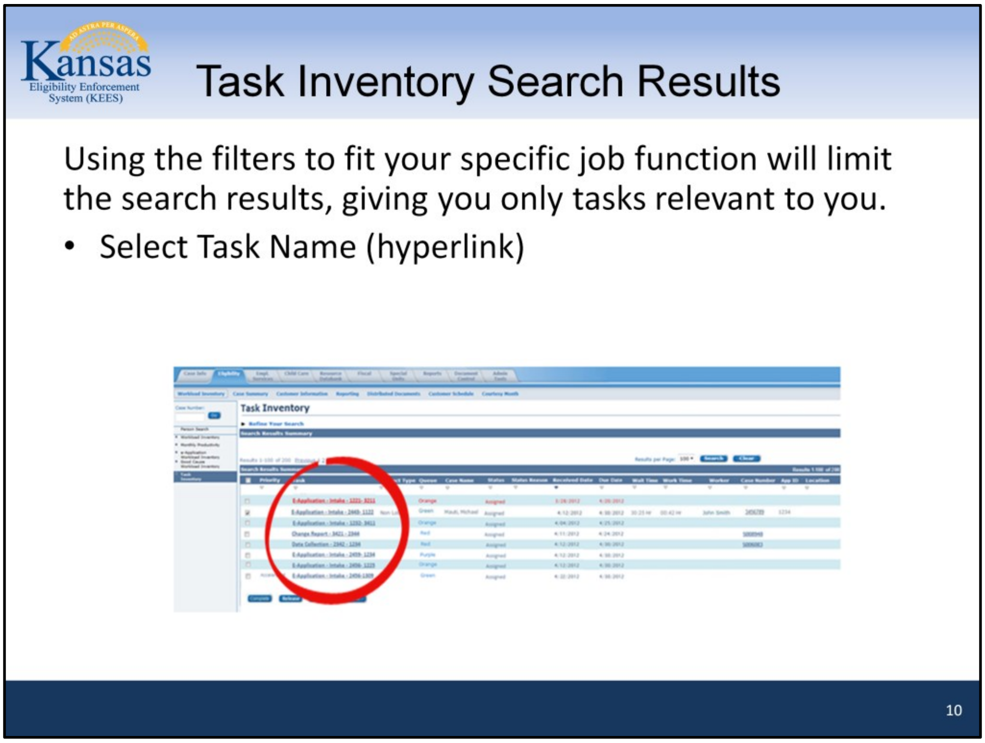
Date Type would have to be selected if a date is entered into the Date Range fields. The options will be:

- Received Date
- Created Date
- Due Date

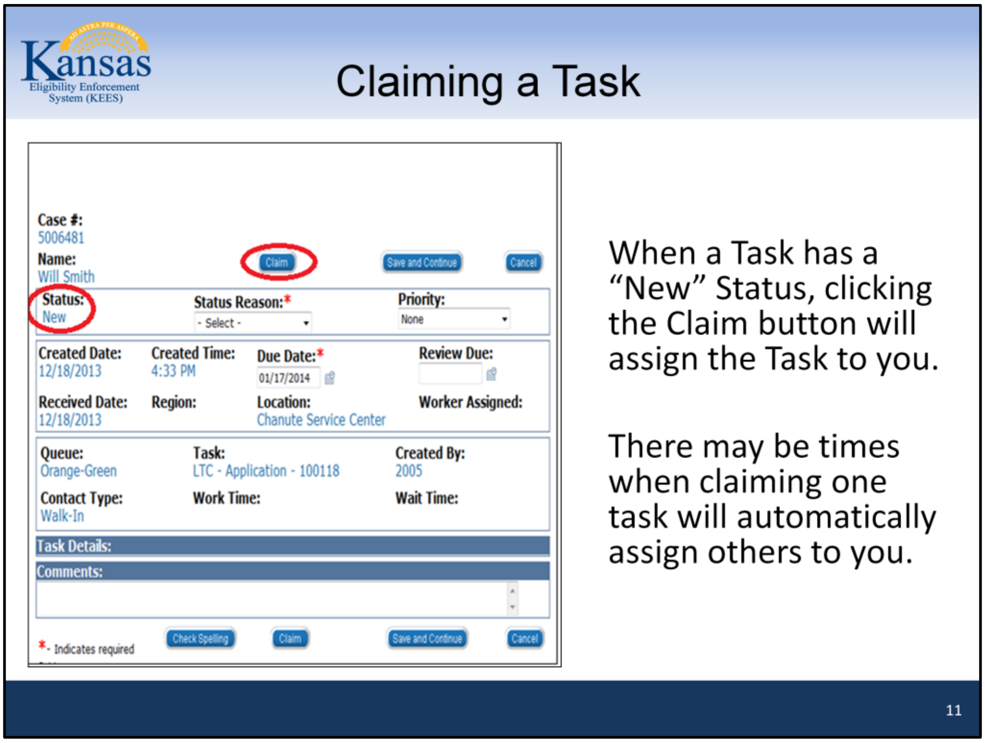
App ID will include the ID's from ImageNow

Using the filters on this page for searching will greatly enhance the ability to find tasks associated with your job functions.

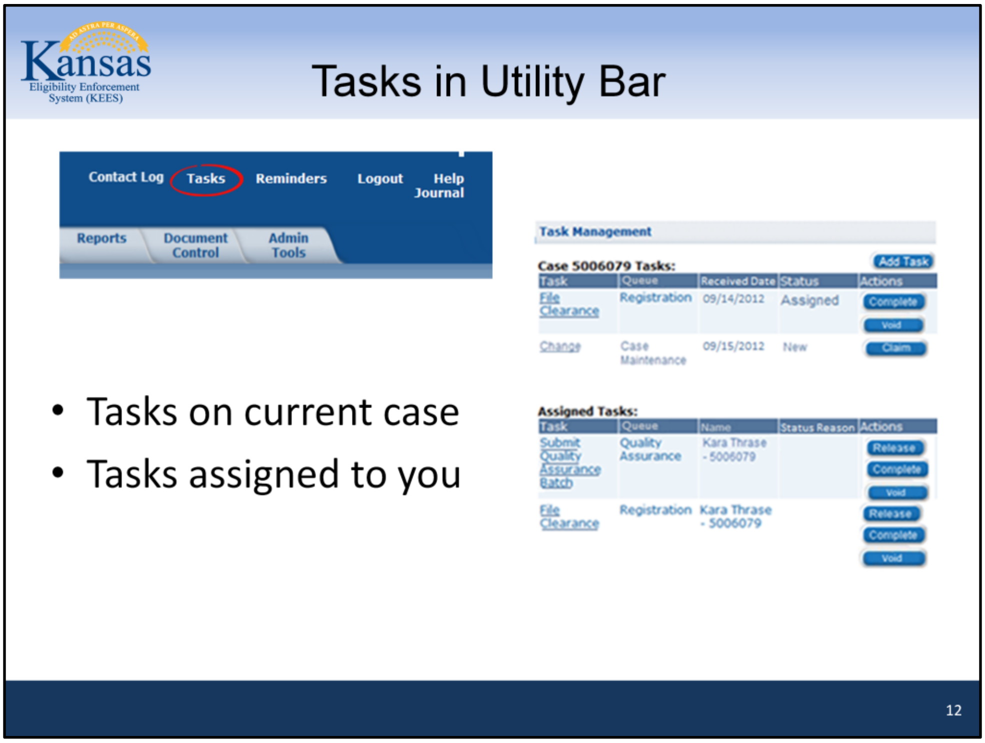
Click the search button once the filters have been selected
Click the clear button to start your search with new filters



- After you have applied your search criteria / filters, clicked the Search button, and received the results, ***click the Task Name hyperlink to open the Task Details window to claim the task***.
- Applying the correct filters to best fit your specific job functions will greatly enhance your ability to quickly sort through the Task Inventory Search results.
- A blank in the Case Number field is usually a Non-medical case in KAECSES



- Claiming a Task from the Task Details window is as easy as one click on the Claim button.
- ***Review 4 possible status***:
  - ***New: A task has not been claimed.***
  - ***Assigned: A task has been claimed***
  - ***Complete: A task has been processed.***
  - ***Rejected: A task has been voided.***
- ***The buttons available on the Task Details page depends on the status of the case.***
- It should be noted that if there are multiple unassigned tasks in the same queue for the same case, when you claim one, all tasks for that case will be claimed. You must manually release all of the tasks claimed that you are not able to complete. ***The Task Portlet on the KEES Home page will show you which tasks have been assigned to you and allow you to release all the tasks claimed for a case. This can also be done by using the Task Management page which we'll discuss on the next slide.***
- ***Non-medical programs will have the KAECSES/KSCares number listed in the Comments section.***



- **Trainer Note: Before we jump into the Task Management screen, let's review where we've been.**
    - **We started out on Task Portlet to make sure we didn't have any outstanding tasks. Ask the audience: "Where is the Task Portlet?"**
    - **Then we clicked on the "View All" button to take us to the Task Inventory page**
    - **We applied our filters for Region, Location, Queue, and Status**
    - **Found our task and clicked on the hyperlink**
    - **And then we claimed the task.**
- **Now let's learn about how we check for other tasks related to the same case.**
- The Task Management screen is a pop-up window that is accessed using the Tasks link in the Utility Navigation bar at the upper right corner of KEES when you are logged in and in the context of a case.

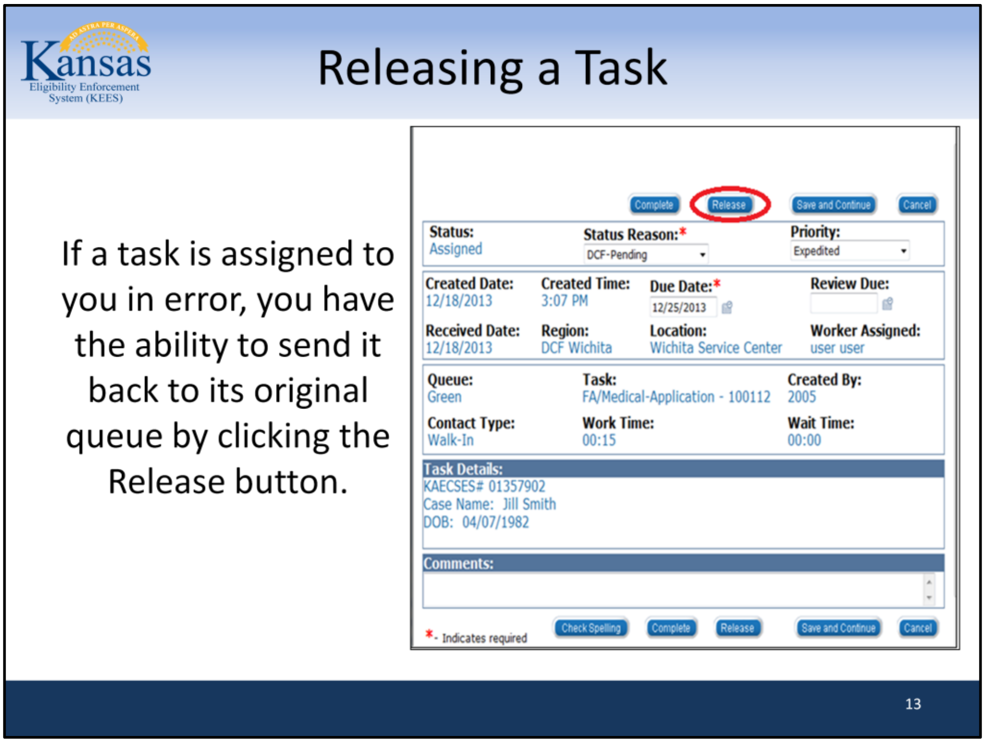
Trainer's Note: Show location using training region.

- This page is used to see all tasks assigned to the case, ***as long as a KEES case number is available***. It also shows all of the tasks currently assigned to you. **By easily seeing all tasks involved with a case, One Contact Resolution, or resolving all the tasks associated with a case at one time, becomes easier to identify.**
- If there are other tasks on this case, they will be displayed in the top portion of this pop-up.

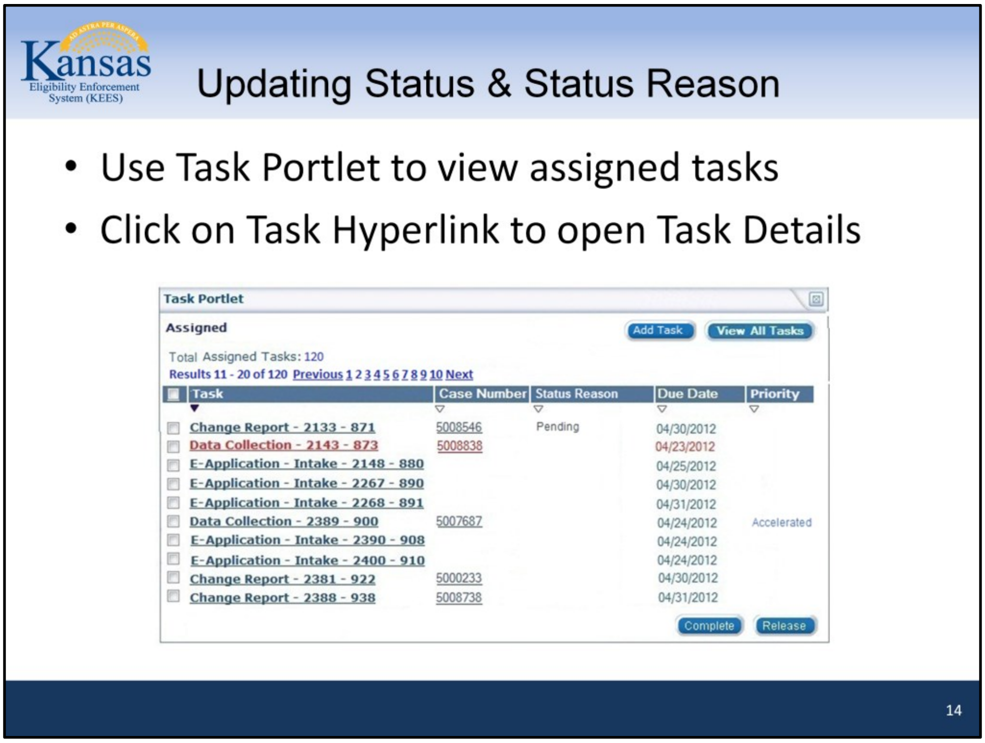
- When a worker goes to a case to work a task they should first go to the Task Management screen and if there are any other tasks on the case they should:
  - Claim all other tasks if they are unassigned
  - Release their task if one or more of the tasks on the case have already been assigned ***or if the user has not been trained on KEES and an active KEES case is attached***.
    - Tasks in the same queue should already automatically assign to the same worker
- From this link, you can Add tasks, Complete Tasks ***(suggest not using since a status reason will not be entered)***, Void Tasks and Release Tasks.

Task Management can also be used as a reference when a consumer calls into the office. After their case is located in KEES and the worker is in the context of the case, opening the Task Management window will show if there are any tasks associated with the case, as well as the queue where the task is currently housed. In addition, similar to what workers do now, they will also look at the following: Task Management for current tasks, Journal for case activity, Document Control for Notices and Forms sent to the Consumer, and ImageNow for documents that have been imaged to the case.

Because Non-Medical tasks will not appear in KEES with a Case Number or Case Name, staff will not be able to search for multiple tasks associated to the same Non-Medical case during Phase 2.



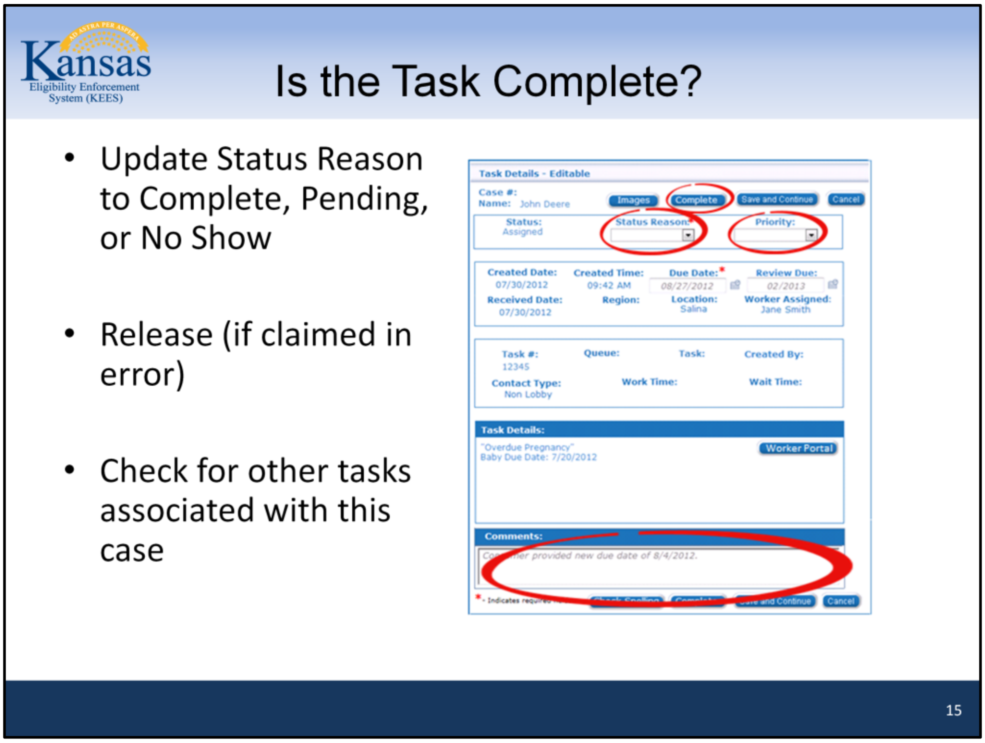
- Based on the task details, you can consider whether or not you have the training necessary to complete the task. If you cannot complete the task, or it was assigned to you in error, you should release the task back to the queue by clicking the Release button.
- If the task is released back to the queue, the system will return the status to 'New'.
- Remember, if you claim a task from the Task Details page, and there are other tasks associated with that task those will be assigned to you as well. You will have to release each one of them if they should not be assigned to you. This can be done from the Task portlet on the home page, the Task Management screen, or Task Inventory page by filtering by 'assigned to me'



Trainer's Note: Review with training participants where Task Portlet page is located (Home Page accessed by clicking on Kansas logo).

Once all the work for the tasks has been completed as far as possible:

- Task Portlet will show all assigned tasks
- Clicking on the Task Hyperlink will open Task Details page
- Repeat until all Tasks have been updated with a "Complete" status and the applicable "Status Reason."



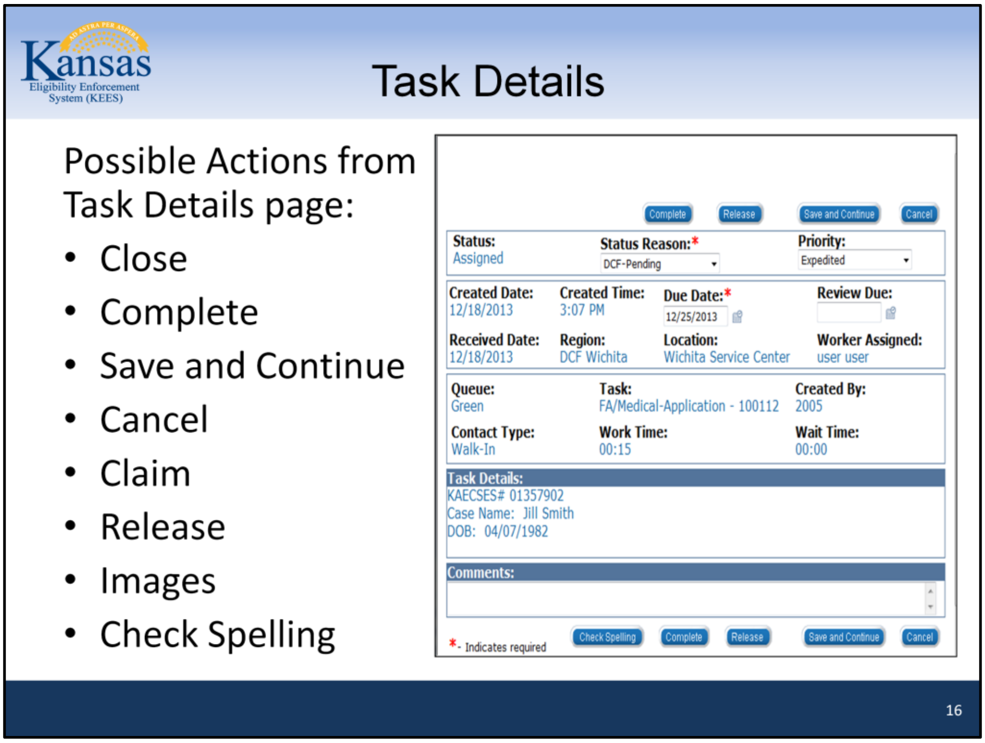
- After claiming and working a task, you must consider whether or not the task is finished …..
  - If Finished, the status reason should be updated to reflect the action taken on the task.
- Click on the Status Reason drop down values and select an appropriate value to update the Status Reason

Review Status Reasons:

- **Complete** – The task has been finished and the client's request has been resolved. The client will need no further contact with the agency related to this request. In the case of an application, the worker has either approved or denied all programs applied for. In the case of a reported or known change, the worker has completed the change on the case and made an eligibility determination for all programs. Partial approval could result in additional contacts from the client requesting information about the status of their request.
- **Pending** – The task has been worked as far as possible and the clients request has not been resolved. Pended work is an indication there will be at least one or more contacts with the client. In the case of an application, pending indicates we were unable to approve or deny any one of the programs applied for.

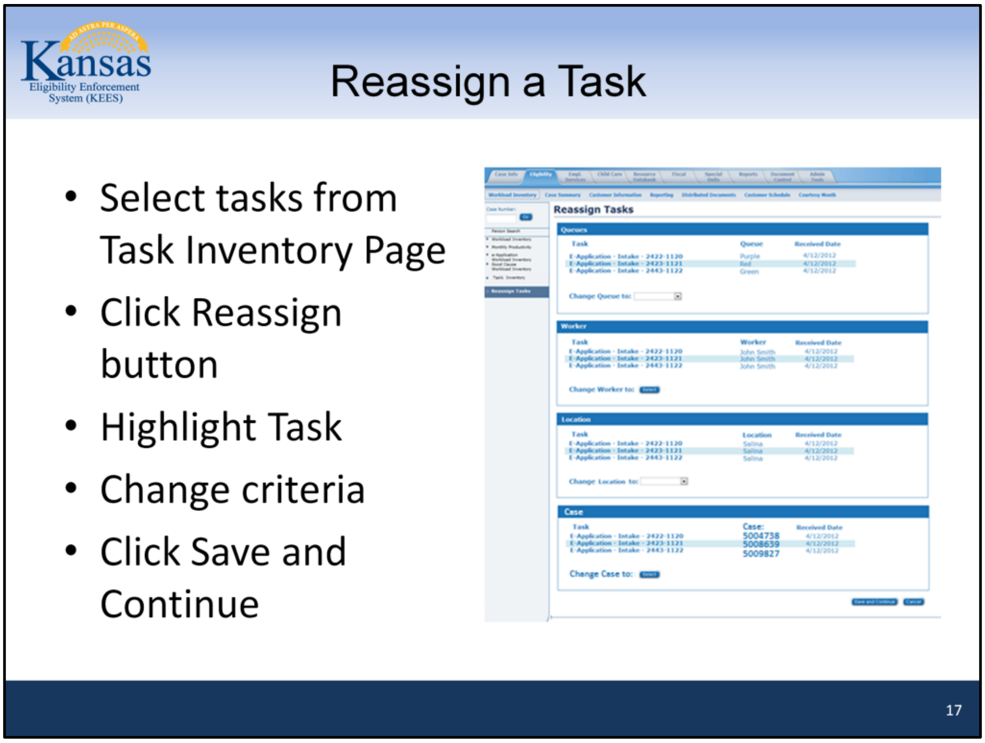
- **No show** – An interview was attempted but we were unable to complete. Examples of no show include for the nonlobby and orange an unsuccessful cold call attempt or in the lobby when the client leaves the office before being called to the interview. In the case of an application where multiple programs have been applied for no show indicates the cold call was unsuccessful and the agency was unable to complete the interview and any additional program requests pend for verification, including information from a third party or any additional program is processed where an approval or denial is made.

- When the task is finished and the status reason selected, click the Complete button. ***This will change the status from Assigned to Complete.***
- The Priority and Comments fields may also be edited. Click Save and Continue if only editing the Priority or Comments fields.

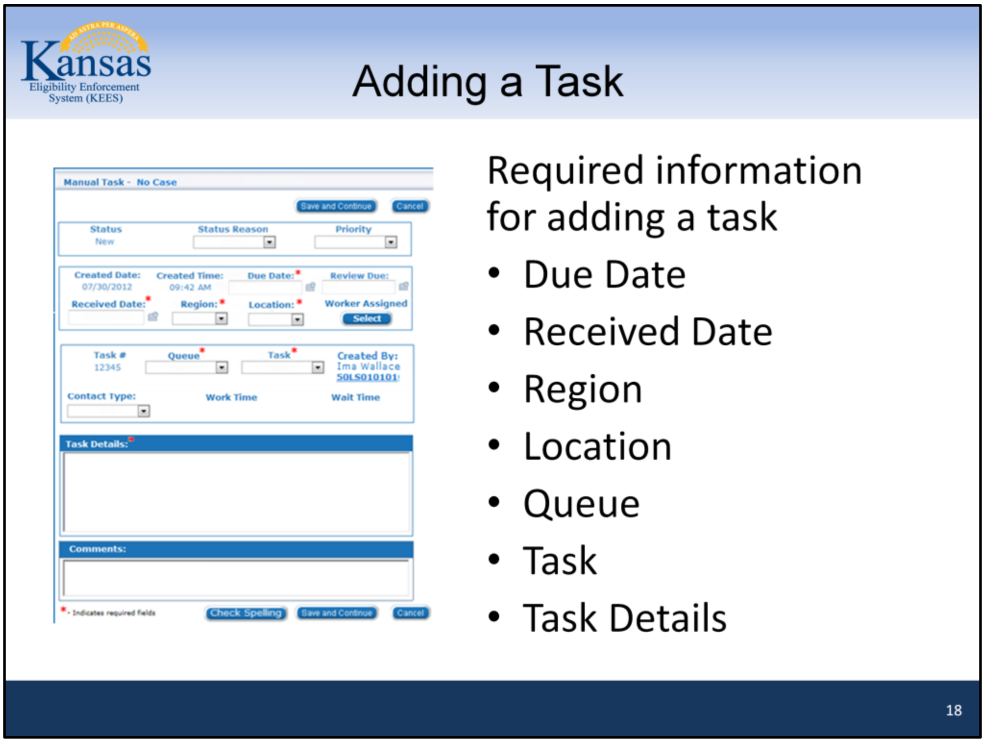


- When you click on the hyperlink that is a task, a Task Details window will pop-up.
- This screen provides you with a summarized view of the details associated to the specific task.
- Any comments that were made specific to that task would also display on this page.
    - It is important to note that while the comments section will be used to replace the comments information on the current tracker, these comments will not display on the Task Detail List page. The comments section is where you will enter the KAECSES case number.
- ***Remember***, the buttons available on any Task Details page may vary depending on the status of the task.
- The **Close** button will close the Task Details pop-up window. This will not change the status of the task.
- The **Complete** button will only appear if the status of the task is “Assigned” and will save any changes you made while updating a task, and then complete the task. Clicking this button will also close the pop-up window.
- The **Save and Continue** button will save any changes made to the editable fields and close the pop-up window.
- The **Cancel** button will close the window and navigate back to the Task Inventory page.
- The **Claim** button only appears when the status of the Task is “New” and will assign the task to you.
- The **Release** button will release an assigned task back into its original queue.

- The **Images** button will open ImageNow and display the images that are associated with the task.
    - When a worker goes to work a task on a case they are also responsible for searching if there are any new images on the case since the task was created. If there are new images the worker must verify that the new documents have been accounted for correctly.
    - Workers will receive training on how to search for images during imaging training. A job aide has also been created to give guidance on how to search for images.



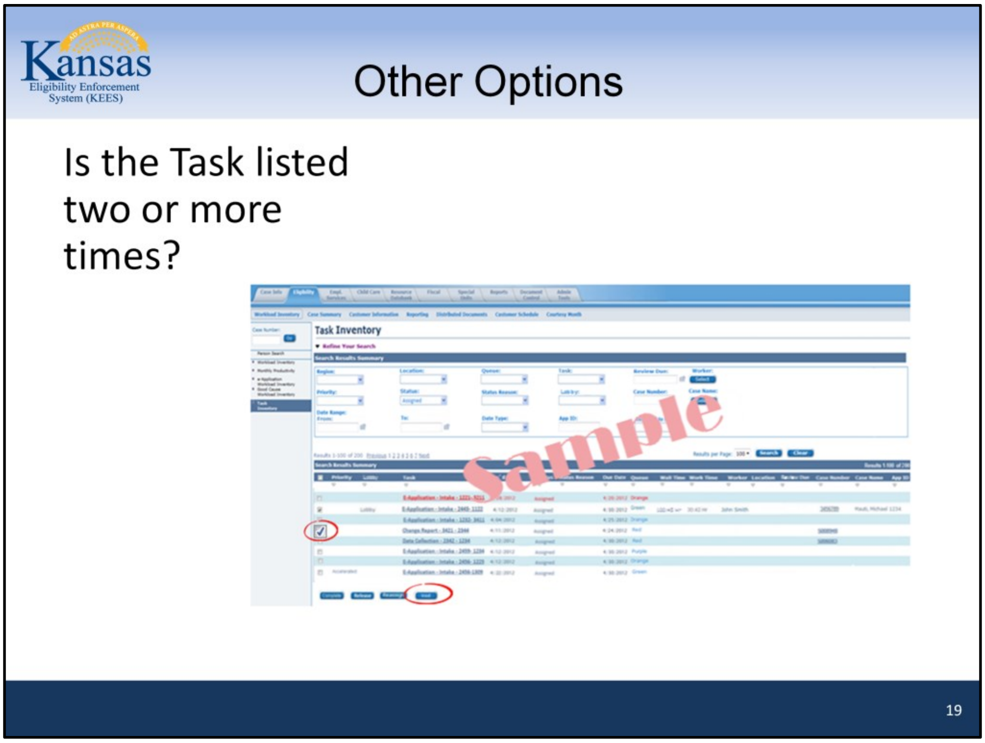
- You will not reassign tasks often. But, if you need to, here's information about that process.
- The Reassign Tasks screen will display when you select tasks from the Task Inventory page and then select the Reassign button.
- Once on the page, the selected task(s) will appear in each of the four sections: Queues, Worker, Case and / or Location. Highlighting a task and changing one of those criteria will update the task and return you to the Task Inventory page after you click the Save and Continue button.
- Possible scenarios for when you'd use this functionality:
    - A case with conflict of interest. For example, the application belongs to someone in the same office. The Task can be Re-Assigned to a different office location to be worked.
    - ICTs—All task should be worked before transferring a case, but in rare circumstance, existing tasks could be Re-Assigned to a different office location.
    - Human error: If you create a task and assign it to the wrong queue, it can be reassigned to the correct one.



Eligibility staff may need to create a task

- **The dynamic fields, Region, Location, Queue, and Task drop down fields, need to be COMPLETED IN ORDER.**
- The **Status** of a manual task will always begin as new
- The **Task #** is a system generated number used as a unique identifier for the task
- The **Created Date** and **Created Time** act as a Date and Time stamp of when the task was created
- The **Created By** label will also be auto-populated with your worker ID and worker name when you create the task.
- The **Due Date** of a task is a required field using current policy. For instance, application tasks are set at 30 days, and most everything else is set at 10 days.

- Adding a task can also take place inside the context of a case.
    - While you are in the context of the case, click the Tasks link in Utility navigation.
    - The Task Management Screen will display with an Add Task button in the upper right hand corner.



- You may occasionally find a task that is unnecessary and needs to be voided.
- Select Task and then click the Void button to void the task from either the Task management screen or Task Inventory page.
- When the task is voided, the system will change the status to Rejected.
- Not all users will have the ability to Void tasks.
- DO NOT void tasks unless you are VERY sure it should be voided. Tasks can NOT be recovered once they are voided.

- **Trainer Note: Show staff how to access reports in the training environment by utilizing the Reports Global Navigation Tab**
- Reports are Supervisor/Quarterback function
- All of these reports were built off existing BPM reports and enhanced with KEES.
- All of the reports listed can be sorted by team, lobby and no-lobby.
- They can be run by:
  - Date or Date Range
  - Region
  - Office Location
  - Worker
- They auto run at the end of the day and can also be run on demand.
- Off system percentage calculations that have to be performed today by Supervisors will be done automatically in KEES.

- Note from Lindsay: I don't go over each report individually, but left the information here in case you get questions.
- Completion Rates
  - Ran Daily
  - Total Tasks completed and total task added
  - Number of Staff needed to work the tasks

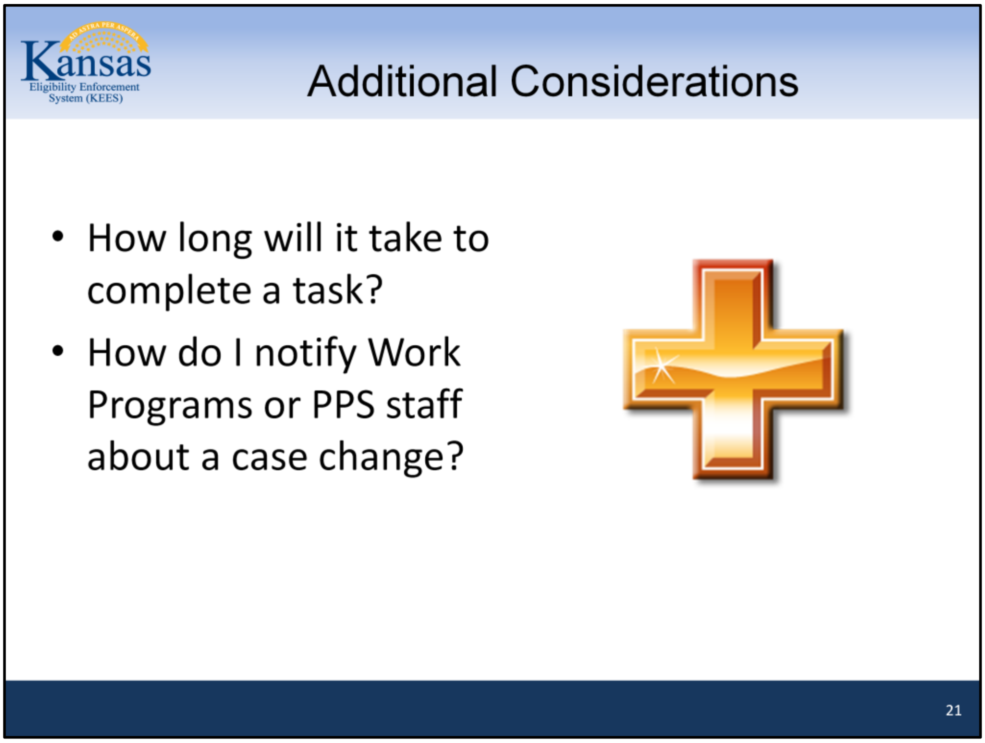
- Tasks In Process
  - Ran Daily
  - Summary displays number or tasks in process
  - Detailed listing specific data such as case number, case name, start time, end time, etc.

- Average Duration Time
  - On Demand and ran at the end of the day
  - Wait duration, visit duration and transaction duration

- Unclaimed Tasks
  - Point in time data.
  - Summary displays the number of unclaimed tasks and the hours to complete.
  - Detailed listing displays contact type, case number, case name, wait time, etc.

- Completion Rates Trend
  - Same information on the 'Completion Rate by Team' report except it provides information over a period of time
  - Total number or tasks added and number of staff needed

- Finished Tasks Activity
  - Ran daily
  - Categorizes claimed tasks which were started and finished.
  - Summary displays the number of finished tasks per team.
  - Detail listing displays contact type, case name, start time, end time, etc.



- Staff will not create tasks if the work itself takes less time to complete than the time it takes to create the task.
- The processes you use today to communicate case changes with PPS or Work Programs will stay in place for Phase 2 implementation of KEES. In most situations, changes are communicated through email, and this will not change for Phase 2.

Kansas Eligibility Enforcement System (KEES)

Benefits

- Priority
- Accessibility
- 1 “Tracker” vs. 3
- Reports

- **Trainer Note: Have staff list some benefits they heard.**

- Some of the benefits to replacing the tracker within KEES are that:
- Tasks can be prioritized.
- Anything non-lobby can be manually given an expedited status on the Task Inventory.
- Accessibility is another benefit as the Task Inventory will be available from the worker’s desktop giving staff the ability to claim a task from their computer.
- Also, staff will have the ability to work from multiple queues based on security rights.
- In KEES there will be one tracker vs. the three we have today. Today the 3 databases, Non-lobby, Lobby, and LTC will all be combined into one.
- Combining these 3 databases will give offices the ability to obtain all tracker data from one spot improving BPM reporting capabilities.
- Also, most of these reports can be ran for a specific time frame.

Kansas
Eligibility Enforcement
System (KEES)

Questions

23