

# Task





**Create TASK**  
**Filter TASK**  
**View TASK**  
**Claim TASK**  
**Release TASK**  
**Update TASK**  
**Reassign TASK**

**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 currently.**

**This will not change with KEES.**



# Interfaces can also create actions that could trigger a task in KEES.

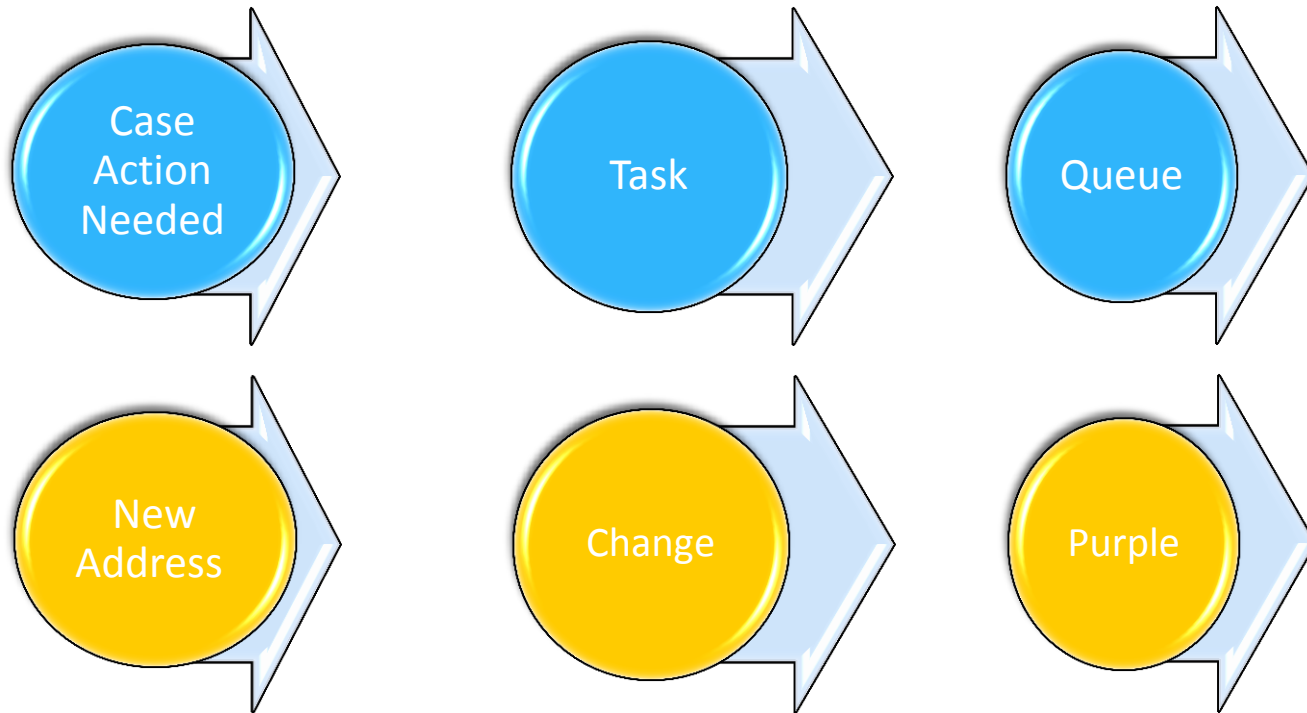
KEES will produce system generated tasks, much like KAECSES.

Task Details - Windows Internet Explorer  
http://10.34.33.71:7321/apspp/porlets/taskDetailsPortlet.portlet?...  
Case #: 20007111  
Name: Rogue Allen  
Status: New Status Reason: \* Priority: None  
Created Date: 12/31/2013 Created Time: 11:14 AM Due Date: 01/09/2014 Review Due:  
Received Date: 12/31/2013 Region: DCF Kansas City Location: Atchison Service Center Worker Assigned:  
Queue: Blue Task: Review - 100178 Created By: 2005  
Contact Type: Work Time: Wait Time:  
Task Details:  
02/14 review  
Comments:

- Critical age alerts in KAECSES will be critical age tasks in KEES.
  - Today, you receive alerts on WOAL when Social Security stops/ends in KEES it will be a task.

In KEES you will receive the same 'Alerts' you do today but they will be in the form of a task that will be assigned to a Queue.

A Queue is a series of tasks assigned according to the type of work to be completed.



# TASKS can be manually created:

- Outside of the context of a case
- While in the context of a case

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.

**All Non-Medical TASK (i.e. FA, TANF, CC) with no associated KEES case will be created without a case number or case name.**

**This is only an interim process for Phase 2.**





**Task can be  
created using the .....**

- Contact Log**
- Task Portlet**
- Task Management**

# Task Creation

**Always, person search in KEES when creating a task even if the work to be completed is for a Non-Medical program.**

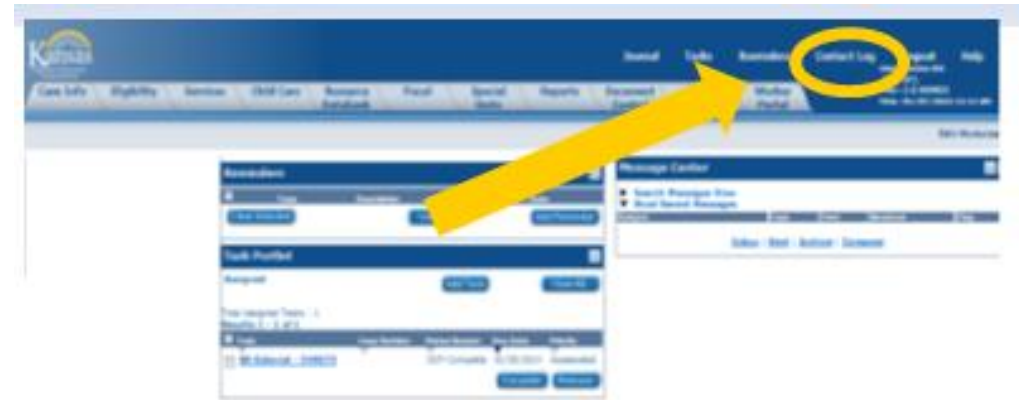
**If a KEES case number exists with an OPEN medical program tied to a DCF Workload ID, the task should be created using the medical case number.**

**The KAECSES/KSCares case number along with case name should be entered into the additional notes or comments section of the task being created.**



# Creating a Task

## Contact Log



From any KEES page you will click 'Contact Log' in the Navigation Bar. This will open a window for 'Contact Log' entry.



If you are already in the context of a KEES case the case number and person drop-down will be pre-populated. If you are not in the context of a KEES case the Contact Log will be blank this is how you would enter your Non Medical Case information.

The screenshot displays the KEES Case Summary page. At the top, the case information is pre-populated: Case Name: Samantha Jones and Case Number: 5007072. The 'Contact Log' tab is selected, and the 'Contact Log Entry' form is visible. The 'Case Number' and 'Person' fields in the form are pre-populated with '5007072' and 'Samantha Jones' respectively. The 'Contact Type' field is set to 'Select -'. The 'Contacted By' field is empty. The 'First Name', 'Middle Name/Initial', and 'Last Name' fields are also empty. The 'Phone Number' and 'DOB' fields are empty. The 'Name of Agency/Organization/Provider/Inquirer' and 'Address Line 1' fields are empty. The 'Case Summary' section on the left shows the case name 'Samantha Jones' and the mailing address '345 MAIN ST TOPEKA, KS 66606'. The home address is also '345 MAIN ST TOPEKA, KS 66606'. The 'Contact Log Entry' form is highlighted with a yellow circle.

Case Number	Person	Contact Type
5007072	Samantha Jones	Select -

Case Name	Mailing Address	Home Address
Samantha Jones	345 MAIN ST TOPEKA, KS 66606	345 MAIN ST TOPEKA, KS 66606

**The Contact Log is similar to the  
“Add New Client Request”  
button on our current tracker.**

**The Contact Log will be used by the Greeter to capture  
task for the Lobby.**

The screenshot shows a web browser window titled "APSP System - Windows Internet Explorer" with the URL [http://10.34.33.71:7211/apsp/portlets/ContactLog.portlet?\\_nfpb=true&\\_portlet.contentOnly=true&initial=initial&\\_portlet.lafUniqueId=](http://10.34.33.71:7211/apsp/portlets/ContactLog.portlet?_nfpb=true&_portlet.contentOnly=true&initial=initial&_portlet.lafUniqueId=). The page displays a "Contact Log Entry" form with the following fields and options:

- Case Number:** [Text input field]
- Person:** [Text input field]
- Contact Type:\***: [Dropdown menu with "Walk-In" selected, highlighted by a yellow circle]
- Contacted By:\***: [Dropdown menu with "Household Member" selected]
- Location:** [Dropdown menu with "Topeka Service Center" selected]
- Agency:\***: [Dropdown menu with "DCF" selected]
- Category:\***: [Dropdown menu with "Change Requests" selected]
- Contact Reason:\***: [Dropdown menu with "Purple-Change" selected]
- Work Completed During Contact**
- Additional notes:** [Text area containing "KAECSES# 00134561 Kay Jones in office reports she has a new job."]

Buttons at the bottom include "Check Spelling", "Save", and "Cancel". A blue "Add" button is located next to the "Work Completed During Contact" checkbox.

APSP System - Windows Internet Explorer

http://10.34.33.71:7211/apsp/portlets/ContactLog.portlet?\_nfpb=true&\_portlet.contentOnly=true&initial=initial&\_portlet.lafUniqueId=

**Contact Log Entry**

Case Number:   Person:  Contact Type:\*

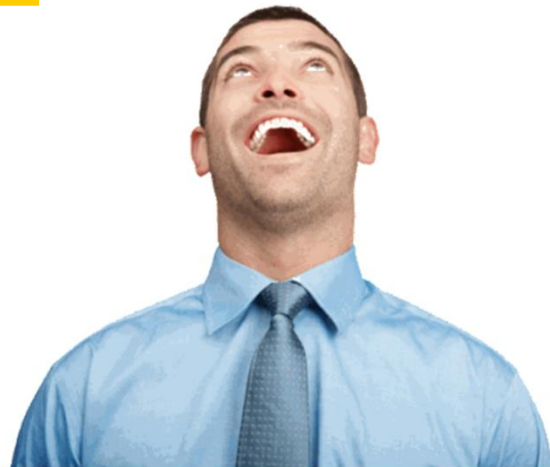
Contacted By:\*  Location:

Agency:\*  Category:\*  Contact Reason:\*   Work Completed During Contact

**Additional notes:**

KAECSSES# 00134561 Kay Jones in office reports she has a new job.

Done Internet | Protected Mode: On 100%



When using the ‘Contact Log’ use the drop down options to capture information:

- Contact Type
- Contact By
- Location
- Agency
- Category
- Contact Reason

and **CLICK SAVE**

**KEES uses this information entered to automatically create a task and assign it to the correct queue.**

APSP System - Windows Internet Explorer  
http://10.34.33.71:7211/.../portlet?\_nfpb=true&\_portlet.contentOnly=true&initial=initial&\_portlet.lafUniqueId=...

### Contact Log Entry

**Case Number:**  **Select** **Person:**  **Contact Type:\*** Walk-In

**Contacted By:\*** Household Member **Location:** Topeka Service Center

**Agency:\*** DCF **Category:\***  **Contact Reason:\*** Purple-Change  Work Completed During Contact **Add**

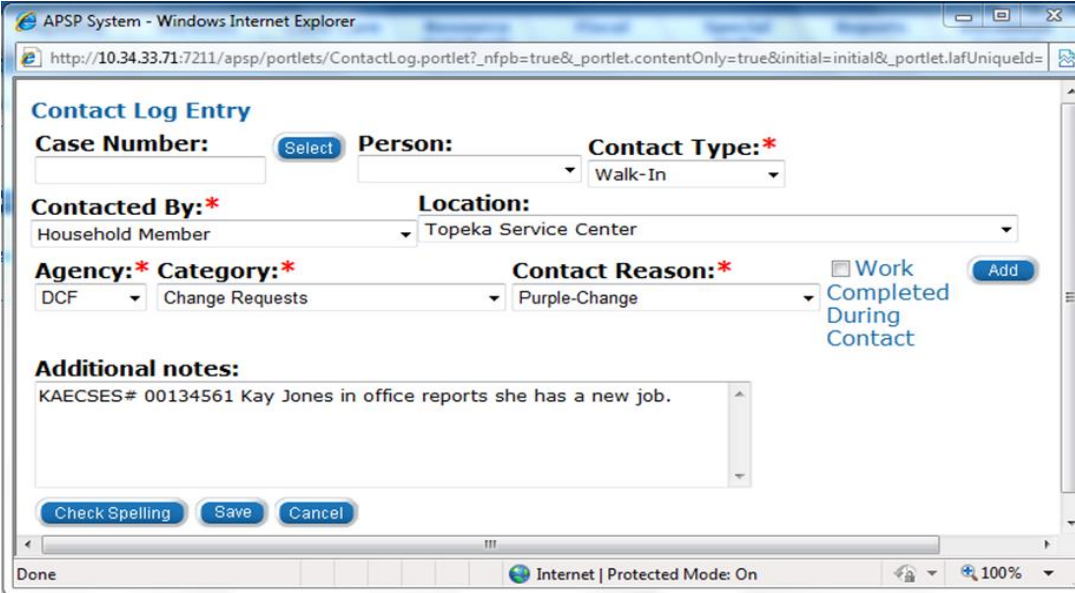
**Additional notes:**  
KAECSES# 00134561 Kay Jones in office reports she has a new job.

**Check Spelling** **Save** **Cancel**

Done Internet | Protected Mode: On 100%

**The Case Number field will only support a KEES Case Number.**

Staff using the Contact Log for a Non-Medical case should enter the KAECSSES/KSCares Case Number and Case Name in the additional notes as shown.



APSP System - Windows Internet Explorer

http://10.34.33.71:7211/apsp/portlets/ContactLog.portlet?\_nfpb=true&\_portlet.contentOnly=true&initial=initial&\_portlet.lafUniqueId=

### Contact Log Entry

**Case Number:**  **Person:**  **Contact Type:\***

**Contacted By:\***  **Location:**

**Agency:\***  **Category:\***  **Contact Reason:\***   **Work Completed During Contact**

**Additional notes:**  
KAECSSES# 00134561 Kay Jones in office reports she has a new job.

The Contact Log will NOT replace the regional phone trackers for Phase 2.

**Contact Log Entry**

Case Number:   Person:  Contact Type: \*

Contacted By: \*  Location:

Agency: \*  Category: \*  Contact Reason: \*   Work Completed During Contact

**Additional notes:**  
 KAECSES# 00134561 Kay Jones in office reports she has a new job.

- Fields with a red asterisk are required.
- Location is not a required field, however; this is a very important step and impacts a user's ability to search for tasks on the Task Inventory page.
- Complete the remaining fields to the best of your ability to make sure any associated tasks are routed appropriately.
- The Contact Log will create automated Journal Entries for Medical Cases for Phase 2.

***There are a large number of Category and Contact Reason drop-downs to choose from. Reference the JOB AID: DCF Tasks for a complete list.***

APSP System - Windows Internet Explorer  
http://10.34.33.71:7321/apsp/portlets/ContactLog.portlet?\_nfpb=true&\_portlet.contentOnly=true&initial=\_portlet.lafUniqueId=apspDefiniti

### Contact Log Entry

Case Number:   Person: JUDITH NOEL BARNE  Contact Type: Walk-In

Contacted By: Household Member  Location: Atchison Service Center

Agency: DCF  Category: - Select -  Contact Reason:   Work Completed During Contact

Additional notes:

The 'Work Completed During Contact' checkbox should be checked if you complete the work at the time of the contact. If this is selected, a task is not generated for another user. However, a task is created and automatically completed for the user who created the contact log.



# Please refer to Job Aid: DCF Task for additional information and a list of task created.



## JOB AID: DCF Tasks

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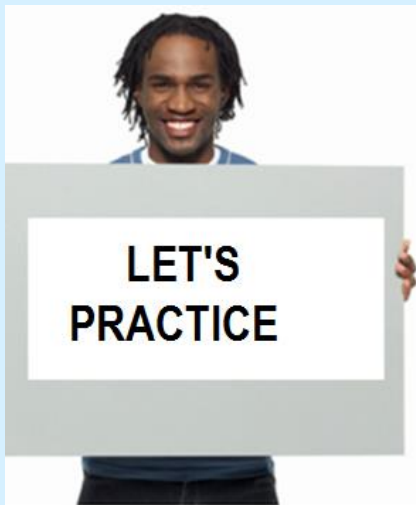
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## Scenario 1



Sarah comes into a local DCF office. She is greeted by Linda. Linda triages the request for service and determines Sarah is turning in an application for Long Term Care and Food Assistance. **Linda documents the contact on the Contact Log.** She informs Sarah of her approximate wait time and asks her to be seated. Tim claims the task from the Task Inventory page and takes Sarah to an interview room. Tim screens the application for the “Big 4” criteria and determines Sarah is applying for Long Term Care and the application will stay with DCF to be processed. Tim registers and processes Food Assistance in KAECSSES and then registers and processes Long Term Care in KEES. Sarah turned in verifications used to process her application. Tim makes copies of the verifications, informs Sarah of her application approval, and places the verifications and application in the designated imaging area. The application and verifications will be prioritized as cold because a determination has been completed. Tim updates the task status reason to complete in KEES.

**Sarah comes into a local DCF office. She is greeted by Linda. Linda triages the request for service and determines Sarah is turning in an application for Long Term Care and Food Assistance. Linda documents the contact on the Contact Log. She informs Sarah of her approximate wait time and asks her to be seated. Tim claims the task from the Task Inventory page and takes Sarah to an interview room. Tim screens the application for the “Big 4” criteria and determines Sarah is applying for Long Term Care and the application will stay with DCF to be processed. Tim registers and processes Food Assistance in KAECSSES and then registers and processes Long Term Care in KEES. Sarah turned in verifications used to process her application. Tim makes copies of the verifications, informs Sarah of her application approval, and places the verifications and application in the designated imaging area. The application and verifications will be prioritized as cold because a determination has been completed. Tim updates the task status reason to complete in KEES.**



**Support Staff will use the  
'Contact Log'  
to create task for Lobby.**

**For manually creating all Non-Lobby  
Task, Support Staff will use either the  
'Task Portlet'  
Or  
'Task Management'**

## Creating a Task

# Task Portlet

Use the Task Portlet when  
adding a Task to a

## Non-Medical Case.

Access the Task Portlet from the KEES Home Page.

The screenshot displays the KEES Home Page interface. At the top left is the Kansas logo. A navigation bar contains links for Journal, Tasks, Reminders, Contact Log, Logout, and Help. Below this is a secondary menu with links for Case Info, Eligibility, Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. The main content area features several portlets: a 'Reminders' portlet with a table of reminders, a 'Message Center' portlet with search and message options, and a 'Task Portlet' which is highlighted with a yellow box. A yellow arrow points from the left side of the screen towards the Task Portlet. The Task Portlet shows 'Assigned' tasks, a total of 1 assigned task, and a table with one task entry.

Type	Case Number	Worker Name	Due Date	Priority
DR, Editorial	LS0003	DCP-Complete	06/30/2014	Assisted

**Task Portlet**

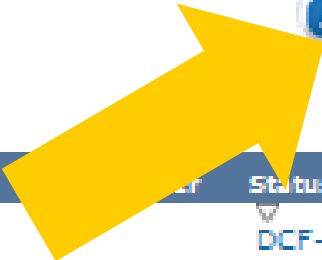
Assigned

**Add Task** **View All**

Total Assigned Tasks : 1  
Results 1 - 1 of 1

Task	Status Reason	Due Date	Priority
<a href="#">GR-External - 540073</a>	DCF-Complete	01/30/2014	Accelerated

**Complete** **Release**



**Manual Task - No Case**

**Save and Continue** **Cancel**

Status: New    Status Reason:     Priority:

Created Date: 07/30/2012    Created Time: 09:42 AM    Due Date:     Review Due:

Received Date:     Region:     Location:     Worker Assigned:  **Select**

Task #: 12345    Queue:     Task:     Created By: Ima Wallace 50LS01010!

Contact Type:     Work Time:     Wait Time:

**Task Details:**

**Comments:**

\* - Indicates required fields    **Check Spelling** **Save and Continue** **Cancel**

Inside the Task Portlet you will click the 'Add Task' Button.

This will open a window for 'Manual Task No Case'.

Using the drop down options  
select 'Priority' if  
appropriate.

Enter a Due Date, Review  
Due and Received Date in  
MM/DD/YYYY format.

Using the drop-down options  
select the appropriate  
Region, Location, Queue,  
Task and Contact Type.

The screenshot shows a web form titled "Manual Task - No Case". At the top right are "Save and Continue" and "Cancel" buttons. The form is divided into several sections:

- Status Section:** Includes "Status" (New), "Status Reason" (dropdown), and "Priority" (dropdown).
- Date and Time Section:** Includes "Created Date" (07/30/2012), "Created Time" (09:42 AM), "Due Date:" (required, dropdown), "Review Due:" (dropdown), "Received Date:" (required, dropdown), "Region:" (required, dropdown), "Location:" (required, dropdown), and "Worker Assigned" (Select button).
- Task Information Section:** Includes "Task #" (12345), "Queue:" (required, dropdown), "Task:" (required, dropdown), "Created By:" (Ima Wallace, 50LS010101), "Contact Type:" (dropdown), "Work Time", and "Wait Time".
- Task Details:** A large empty text area.
- Comments:** A large empty text area.

At the bottom left, a note states "\* - Indicates required fields". At the bottom right, there are "Check Spelling", "Save and Continue", and "Cancel" buttons.

- Enter Task Details
  - Enter the KAECSSES/KSCares cases number and case name in the Comments Section.
- Use the Check Spelling function.
- Click Save and Continue.

Manual Task - No Case - Windows Internet Explorer

http://10.34.33.71:7211/assp/portlets/addTasksPortlet.portlet?\_nfpb=true&\_portlet.contentOnly=true&\_portlet.lafUniqueId=asspDefinitionLabel\_1&\_portl

Save and Continue Cancel

Status: New Status Reason: Priority: Expedited

Created Date: 01/07/2014 Created Time: 12:15 PM Due Date: \* 02/07/2014 Review Due:

Received Date: \* 01/07/2014 Region: \* DCF East Location: \* Topeka Service Center Worker Assigned:

Queue: \* Green Task: \* FA/Medical-Application Created By: Donna Uhl KH0206Q1A8

Contact Type: Work Time Wait Time

Task Details: \* Expedited FA application client known to system.

Comments: KAECSSES #00237612 Nona Thomas

\* - Indicates required fields

Check Spelling Save and Continue Cancel

Error on page. Internet | Protected Mode: On 75%



Manual Task - No Case - Windows Internet Explorer

http://10.34.33.71:7211/assp/portlets/addTasksPortlet.portlet?...&priority=Expedited

Status: New

Priority: Expedited

Created Date: 01/07/2014

Created Time: 12:15 PM

Due Date: 02/07/2014

Received Date: 01/07/2014

Region: DCF East

Location: Topeka Service Center

Queue: Green

Task: FA/Medical-Application

Created By: Donna Uhl KH0206Q1A8

Task Details: Expedited FA application client known to system.

Comments: KAECSES #00237612 Nona Thomas

\* Indicates required fields

Buttons: Check Spelling, Save and Continue, Cancel

Footer: Error on page. Internet | Protected Mode: On 75%

- Tasks created for Applications should be set with a 30 day due date.
- Expedited FA Applications set with a 7 day due date and a ‘Priority’ of ‘Expedite’.
- Other tasks should be set with a 10 day due date.
- ‘Review Due’ enter last day of the Review Month.  
Review 02/2014 ‘Review Due’ should read 02/28/2014

Manual Task - No Case

Save and Continue Cancel

Status: New Status Reason: [ ] Priority: [ ]

Created Date: 07/30/2012 Created Time: 09:42 AM Due Date: \* [ ] Review Due: [ ]

Received Date: \* [ ] Region: \* [ ] Location: \* [ ] Worker Assigned: [ ] Select

Task #: 12345 Queue: \* [ ] Task: \* [ ] Created By: Ima Wallace 50LS010101

Contact Type: [ ] Work Time: [ ] Wait Time: [ ]

Task Details: \*

Comments:

\* - Indicates required fields

Check Spelling Save and Continue Cancel

When creating a manual task the fields must be entered in sequence or the drop-down options will not display correctly.

Items with a Red Asterisk are mandatory.

**Sarah mails in a Food Assistance and TANF application. Jack registers the application in KAECSSES and then creates a manual task in KEES for the Red Team.** He images the application to the appropriate doc type and indexes the images to the KAECSSES case number in ImageNow. Rebecca claims the task and attempts to cold call Sarah. The cold call is unsuccessful. Rebecca updates the task status reason to no show in KEES.

## Scenario 2



## Creating a Task

# Task Management

Task Management				
<b>Case 5006079 Tasks:</b>				<a href="#">Add Task</a>
Task	Queue	Received Date	Status	Actions
<a href="#">File Clearance</a>	Registration	09/14/2012	Assigned	<a href="#">Complete</a> <a href="#">Void</a>
<a href="#">Change</a>	Case Maintenance	09/15/2012	New	<a href="#">Claim</a>
<b>Assigned Tasks:</b>				
Task	Queue	Name	Status Reason	Actions
<a href="#">Submit Quality Assurance Batch</a>	Quality Assurance	Kara Thrase - 5006079		<a href="#">Release</a> <a href="#">Complete</a> <a href="#">Void</a>
<a href="#">File Clearance</a>	Registration	Kara Thrase - 5006079		<a href="#">Release</a> <a href="#">Complete</a> <a href="#">Void</a>

Use the Task Management window to add a Task to a **KEES Case**

From any KEES page, click **'Tasks'** in the Utility navigation bar.

This will result in a **'Task Management'** window where you can add tasks while in the context of a specific KEES Case.

The screenshot displays the KEES (Kansas Eligibility Enforcement System) interface. At the top, the case information for Steve Barton (Case Number: 20007616) is shown. The navigation bar includes links for Journal, **Tasks**, Reminders, Contact Log, Logout, and Help. The main content area is divided into two panes. The left pane shows the Case Summary for Steve Barton, including mailing and home addresses. The right pane is titled 'Task Management' and shows 'Case 20007616 Tasks' with an 'Add Task' button highlighted. Below this, there are sections for 'Assigned Tasks' and 'No Results'.

Case Name: Steve Barton  
Case Number: 20007616

Journal **Tasks** Reminders Contact Log Logout Help  
User : user user  
Env : TRAN2  
Ver : 1.7.014  
Time : 12/30/2013 12:55 PM

Workload Inventory Case Summary Customer Information Reporting Distributed Documents

Case Number  
Request ID  
Go

Person Search  
Workload Inventory  
Review and IR List  
e-Application Workload Inventory  
Good Cause Workload Inventory  
Task Inventory

**Case Summary**

Case Name: Steve Barton  
Mailing Address: 1305 PATTON RD, GREAT BEND, KS 67530  
Phone Number: (620)792-5555  
Home Address: 1305 PATTON RD, GREAT BEND, KS 67530

Companion Cases  
Case Number

Display: 02/01/2014 View

Medical Programs

Task Management - Windows Internet Explorer  
http://10.34.33.71:7321/apspp/portlets/taskManagement.portlet?\_nfpb=true&\_port

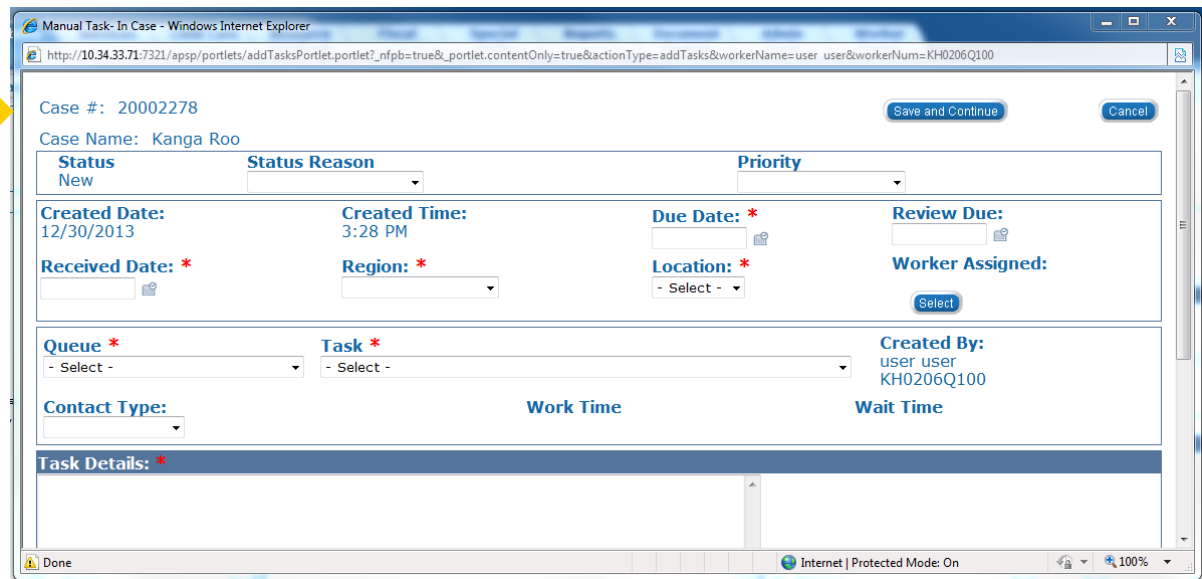
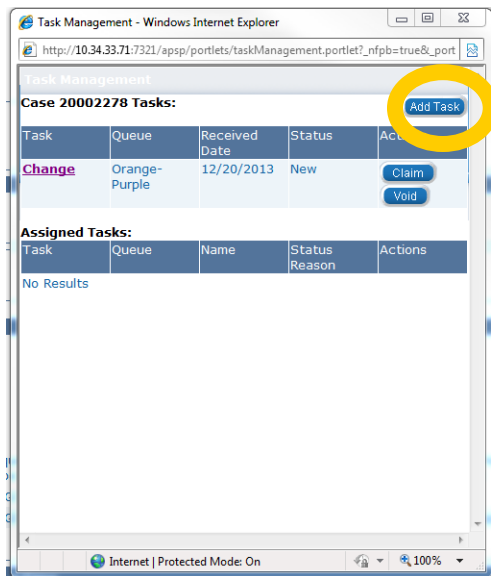
Task Management  
Case 20007616 Tasks: Add Task  
Task Queue Received Date Status Actions  
No Results

Assigned Tasks:  
Task Queue Name Status Reason Actions  
No Results

Capture Images

Add

# You will click the 'Add Task' button to access the Manual Task In Case window.



Manual Task - In Case - Windows Internet Explorer

http://10.34.33.71:7321/aps/portlets/addTasksPortlet.portlet?\_nfpb=true&\_portlet.contentOnly=true&actionType=addTasks&workerName=user user&

Case #: 20007111 Save and Continue Cancel

Case Name: Rogue Allen

Status: New | Status Reason: | Priority: |

Created Date: 01/07/2014 | Created Time: 1:23 PM | Due Date: \* 02/07/2014 | Review Due: |

Received Date: \* 01/07/2014 | Region: \* DCF East | Location: \* Topeka Service Center | Worker Assigned: | Select

Queue \* Orange-Purple | Task \* Address Change | Created By: user user KHO206Q100

Contact Type: Document | Work Time | Wait Time

Task Details: \*

Client provided new address and lease. Client has open FA case.

Comments:

KAECSSES #00786543 Client open FA Case

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**Using the drop down options select 'Priority' if appropriate.**

**Enter a Due Date, Review Due and Received Date in MM/DD/YYYY format.**

**Using the drop-down options select the appropriate Region, Location, Queue, Task and Contact Type.**

Manual Task - In Case - Windows Internet Explorer

http://10.34.33.71:7321/apspp/portlets/addTasksPortlet.portlet?...nfpb=true&\_portlet.contentOnly=true&actionType=addTasks&workerName=user user&

Case #: 20007111 Save and Continue Cancel

Case Name: Rogue Allen

Status: New | Status Reason: | Priority: |

Created Date: 01/07/2014 | Created Time: 1:23 PM | Due Date: \* 02/07/2014 | Review Due: |

Received Date: \* 01/07/2014 | Region: \* DCF East | Location: \* Topeka Service Center | Worker Assigned: | Select

Queue \* Orange-Purple | Task \* Address Change | Created By: user user KHO206Q100

Contact Type: Document | Work Time | Wait Time

Task Details: \*

Clinet provided new address and lease. Client has open FA case.

Comments:

KAECSSES #00786543 Client open FA Case

Error on page. Internet | Protected Mode: On 75%

- Enter Task Details

Enter the KAECSSES/KSCares case number in the ‘Comments’ if the person making contact has a Non-Medical case in addition to a DCF medical case in KEES.

- Use the Check Spelling function.

- Click Save and Continue.



## Same as Before!

Manual Task - In Case - Windows Internet Explorer

http://10.34.33.71:7321/assp/portlets/addTasksPortlet.portlet?...&workerName=user user&

Case #: 20007111 Save and Continue Cancel

Case Name: Rogue Allen

Status	Status Reason	Priority
New		

Created Date: 01/07/2014    Created Time: 1:23 PM    Due Date: 02/07/2014    Review Due: [ ]

Received Date: \* 01/07/2014    Region: \* DCF East    Location: \* Topeka Service Center    Worker Assigned: [Select]

Queue \* Orange-Purple    Task \* Address Change    Created By: user user KH0206Q100

Contact Type: Document    Work Time    Wait Time

Task Details: \*  
Client provided new address and lease. Client has open FA case.

Comments:  
KAECSSES #00786543 Client open FA Case

Error on page. Internet | Protected Mode: On    75%

- Tasks created for Applications should be set with a 30 day due date.
- Expedited FA Applications set with a 7 day due date and a 'Priority' of 'Expedite'.
- Other tasks should be set with a 10 day due date.
- 'Review Due' enter last day of the Review Month.  
Review 02/2014 'Review Due' should read 02/28/2014

Sarah mails in a Medical application to her local DCF office. The application is screened for the “Big 4” criteria prior to being registered and imaged. It is determined that Sarah meets the “Big 4” criteria and the application will be processed by DCF. Jack registers the application and **creates a manual task in KEES for the Orange Team.** He images and indexes the application to DCF doc types. Tim claims the task from the Task Inventory page makes collateral contacts, processes the application in KEES. Tim updates the task status reason to complete in KEES.

## Scenario 3



# Creating a Future Task

- KEES CASE use Task Management/Manual Task-In Case
- NO KEES CASE use Task Portlet/Manual Task-No Case

**This step is just like setting a due date on WOAL in KAECSES. Use the same logic for determining due dates for alerts in KAECSES.**

**Enter the future Due Date in MM/DD/YYYY format.**

You will need to set priority codes to each task to help staff determine which future tasks should be worked by the Purple team vs. Orange-Purple team.

**PURPLE TEAM** - Give them a blank priority code when creating a future task.

**ORANGE PURPLE TEAM** - Give them a task priority code of 'Urgent Need' when creating a future task.

Manual Task- No Case - Windows Internet Explorer  
http://10.34.33.71:7321/apsp/portlets/addTasksPortlet.portlet;jsessionid=vQZnSTGTNG1Jjnp2msrjYQwQfR2IV21C1kPBLFMhBhHpxCKLk09v!1246600368?\_nfpb=true&\_portlet.contentOr

Save and Continue Cancel

Status: W Status Reason: Priority: Urgent Need

Created Date: 01/09/2014 Created Time: 9:56 AM Due Date: \* 06/01/2014 Review Due:

Received Date: \* 01/09/2014 Region: \* DCF East Location: \* Topeka Service Center Worker Assigned:

Queue \* ALERT Task \* MANUAL TASK Created By: user user KH0206Q100

Contact Type: Work Time Wait Time

Task Details: \*

All future tasks will appear with the task name of “Manual Task” in the ‘Alerts’ queue.

When creating a future Task you will need to select ‘Alert’ and ‘Manual Task’.

This is very important because it takes all Future Task out of current reports for BPM statistics.

Manual Task- No Case - Windows Internet Explorer  
http://10.34.33.71:7321/apsp/portlets/addTasksPortlet.portlet;jsessionid=vQZnSTGTNG1jnp2msrjYQwQfR2IV21C1kPBLFMhBhHpxCKLk09v!1246600368?\_nfpb=true&\_portlet.contentOr

**Status**  
New

**Status Reason**  
▼

**Priority**  
Urgent Need

**Created Date:**  
01/09/2014

**Created Time:**  
9:56 AM

**Due Date: \***  
06/01/2014

**Review Due:**  
▼

**Received Date: \***  
01/09/2014

**Region: \***  
DCF East

**Location: \***  
Topeka Service Center

**Worker Assigned:**  
Select

**Queue \***  
ALERT

**Task \***  
MANUAL TASK

**Created By:**  
user user  
KH0206Q100

**Contact Type:**  
▼

**Work Time**

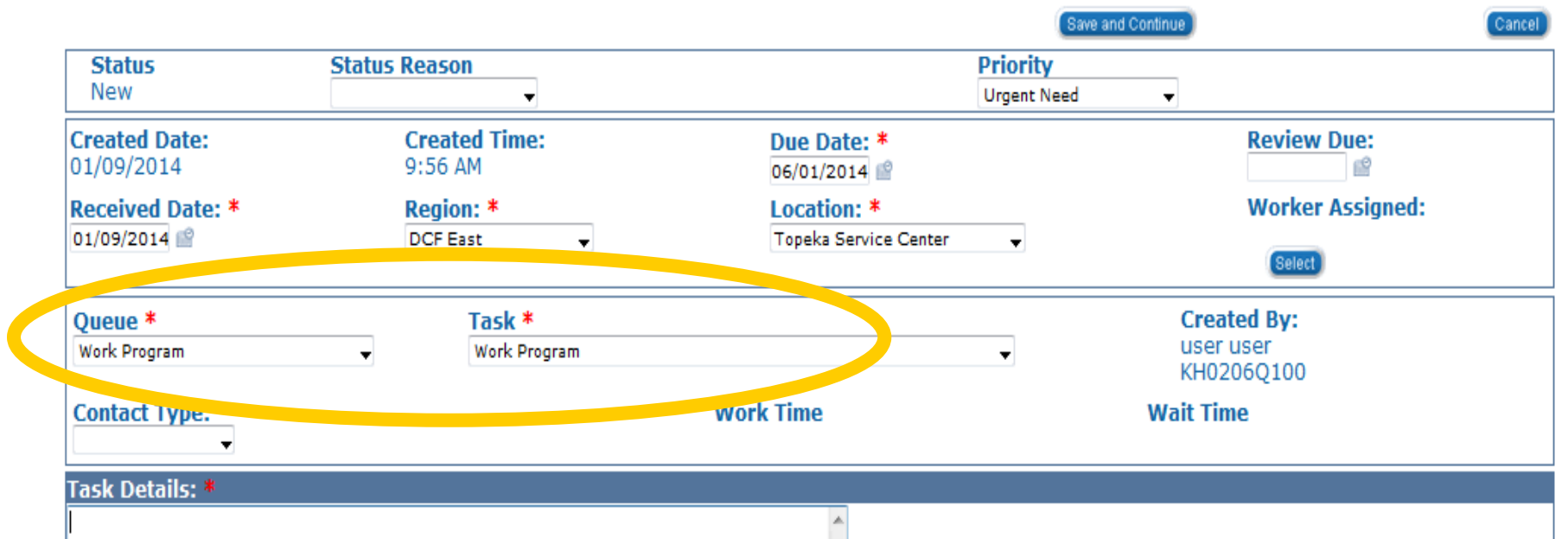
**Wait Time**

**Task Details: \***

All future tasks will be assigned to the 'Alerts' queue.

## The exception to this rule is Work Programs.

Any future task that needs to be completed by a Work Programs Worker should be assigned to Work Programs Queue and Work Programs as the Task Name.



The screenshot shows a task entry form with the following fields and values:

- Status:** New
- Status Reason:** (empty dropdown)
- Priority:** Urgent Need
- Created Date:** 01/09/2014
- Created Time:** 9:56 AM
- Due Date:** 06/01/2014
- Review Due:** (empty date field)
- Received Date:** 01/09/2014
- Region:** DCF East
- Location:** Topeka Service Center
- Worker Assigned:** (empty field with a "Select" button)
- Queue:** Work Program
- Task:** Work Program
- Created By:** user user KH0206Q100
- Contact Type:** (empty dropdown)
- work Time:** (empty field)
- Wait Time:** (empty field)

A yellow circle highlights the **Queue** and **Task** fields, both of which are set to "Work Program".

# Where can I view, filter, claim task?

Task Portlet \*  
Task Inventory Page\*  
Task Management\*



The current 'Tracker' only gives you 1 one way to access your tasks.

With KEES, there are three ways to access your Tasks.

- **Task Inventory Page**, allows you to search for tasks using criteria you enter.
- **The Task Portlet**, is available on your home page and contains a list of the Tasks that are assigned to you.
- **Task Management Window**, allows you to view all tasks related to a specific case and the Task that are assigned to you.



# TASK Inventory

The screenshot displays the KEES (Kansas Early Childhood Enhancement System) interface. The top navigation bar includes links for Journal, Tasks, Reminders, Contact Log, Logout, and Help. Below this, a secondary menu contains Case Info, Eligibility, Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. The main content area is divided into three sections: a search box on the left, a Reminders section, and a Message Center. The Task Portlet is located below the Reminders section and contains an 'Assigned' task list. A yellow circle highlights the 'View All' button in the Task Portlet.

**Reminders**

Type	Description	Date
<a href="#">Clear Selected</a> <a href="#">View All</a> <a href="#">Add Reminder</a>		

**Task Portlet**

Assigned [Add Task](#) [View All](#)

Total Assigned Tasks : 1  
Results 1 - 1 of 1

Task	Case Number	Status Reason	Due Date	Priority
<input type="checkbox"/> Follow Up Call - 100173	20007640		01/01/2014	None
<a href="#">Complete</a> <a href="#">Release</a>				

**Message Center**

[Search Messages View](#)  
[Most Recent Messages](#)

Subject	Type	From	Received	Flag
<a href="#">Inbox</a>   <a href="#">Sent</a>   <a href="#">Archive</a>   <a href="#">Compose</a>				

Access the Task Inventory by clicking the View All button from the Task Portlet. The Task Inventory page will display.

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.

The screenshot displays the 'Task Inventory' web application. At the top, there is a navigation bar with tabs for 'Case Info', 'Eligibility', 'Engr. Services', 'Child Care', 'Resource Database', 'Fiscal', 'Special Skills', 'Reports', 'Document Control', and 'Adults Tools'. Below this is a secondary navigation bar with tabs for 'Workload Inventory', 'Case Summary', 'Customer Information', 'Reporting', 'Distributed Documents', 'Customer Schedule', and 'Courtesy Mail'. The main content area is titled 'Task Inventory' and includes a 'Refine Your Search' section with various filters: Region, Location, Queue, Task, Review Due, Worker, Priority, Status, Status Reason, Contact Type, Case Number, Case Name, Date Range (From), To, Date Type, App ID, and Assigned to Me. Below the search filters, there is a 'Search Results Summary' section with a table of results. The table has columns for Priority, Task, Contact Type, Queue, Case Name, Status, Status Reason, Received Date, Due Date, Wait Time, Work Time, Worker, Case Number, App ID, and Location. The first row shows a task with Priority 'High', Task 'Data Collection - 2312 - 2311', Contact Type 'Lobby', Queue 'Purple', Case Name 'Collins, Kerry', Status 'New', Received Date '4/01/2012', Due Date '4/25/2012', Wait Time '00:25 hr', Work Time, Worker '500564', Case Number '1234', App ID, and Location 'Salina'. There are also 'Claim' and 'Reassign' buttons at the bottom of the table.

Priority	Task	Contact Type	Queue	Case Name	Status	Status Reason	Received Date	Due Date	Wait Time	Work Time	Worker	Case Number	App ID	Location
High	Data Collection - 2312 - 2311	Lobby	Purple	Collins, Kerry	New		4/01/2012	4/25/2012	00:25 hr		500564	1234		Salina
Medium	E-Application - Intake - 1232-3411	Lobby	Orange		New		4/04/2012	4/25/2012	00:15 hr					
Low	Change Request - 1421 - 2348	Non Lobby	Red		New		4/11/2012	4/24/2012			500048			
Low	Data Collection - 1242 - 1234		Red		New		4/12/2012	4/30/2012			500083			
Low	E-Application - Intake - 2433-1231		Purple		New		4/12/2012	4/30/2012						
Low	E-Application - Intake - 2456-1223		Orange		New		4/12/2012	4/30/2012						
Low	Approved E-Application - Intake - 2456-1309		Green		New		4/22/2012	4/30/2012						

# You will have the ability to sort and filter tasks within the Task Inventory to see what task needs to be claimed, are assigned, are past due, expedited, etc...

### Task Inventory

▼ Refine Your Search

Region: DCF East    Location:    Queue:    Task:    Review Due:    Worker:   
 Priority:    Status: New    Status Reason:    Contact Type:    Case Number:    Case Name:   
 Date Range: From    From    Date Type:    App Id:    Assigned to Me:

Results per Page: 25    Search    Clear

Search Results Summary Results 1 - 25 of 34

Priority	Contact Type	Task	Rec'd Date	Status	Status Reason	Due Date	Queue	Wait Time	Work Time	Worker	Location	Review Due	Case Number	Case Name	App Id
<input type="checkbox"/>	KDHE-Passive Review	<a href="#">Missing Verification - 200185</a>	10/28/2013	New	KDHE-On Hold	03/17/2041	Q & A				Hiawatha Service Center	10/29/2013			
<input type="checkbox"/>	None	<a href="#">IR-Registration - 200667</a>	11/04/2013	New		11/14/2013	Administrative				Chanute Service Center				
<input type="checkbox"/>	None	<a href="#">Expense Change - 200932</a>	11/05/2013	New		11/15/2013	Eligibility				Topeka Service Center		5007803	Jerry Eddings	
<input type="checkbox"/>	None	<a href="#">Route to KDHE - 200906</a>	11/05/2013	New		11/09/2013	Alert				Codington				
<input type="checkbox"/>	None	<a href="#">Questions Not Answered - 200812</a>	11/05/2013	New		03/22/2041	Green				Pittsburg Service Center				
<input type="checkbox"/>	None	<a href="#">FA/Medical-Application - 200878</a>	11/05/2013	New		03/22/2041	Green				Pittsburg Service Center				
<input type="checkbox"/>	None	<a href="#">FA/Medical-Application - 200879</a>	11/05/2013	New		03/22/2041	Green				Pittsburg Service Center				
<input type="checkbox"/>	None	<a href="#">Expense Change - 200929</a>	11/05/2013	New		11/15/2013	Eligibility				Topeka Service Center		5007803	Jerry Eddings	
<input type="checkbox"/>	None	<a href="#">Review-Registration - 201307</a>	11/05/2013	New	DCF-No Show	03/23/2041	Blue						20000505	Amy Anderson	

**Available Filters: Region, Location, Queue, Task, Review Due, Worker, Priority, Status, Status Reason, Contact Type, Case Number, Case Name, Date Range, Date Type, App ID and Assigned to Me.**

The screenshot displays a web application interface with a top navigation bar containing tabs: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, and Admin Tools. Below this is a secondary navigation bar with tabs: Workload Inventory, Case Summary, Customer Information, Reporting, Distributed Documents, Customer Schedule, and Courtesy Month. On the left, a sidebar lists navigation options: Case Number: (with a Go button), Person Search, Workload Inventory, Monthly Productivity, e-Application Workload Inventory, Good Cause Workload Inventory, and Task Inventory (which is currently selected). The main content area is titled 'Task Inventory' and contains a filter form with the following fields:

Region: [dropdown]	Location: [dropdown]	Queue: [dropdown]	Task: [dropdown]	Review Due: [input]	Worker: [Select]
Priority: [dropdown]	Status: [Assigned]	Status Reason: [dropdown]	Contact Type: [dropdown]	Case Number: [input]	Case Name: [Select]
Date Range: From: [input]	To: [input]	Date Type: [dropdown]	App ID: [input]	Assigned to Me: [dropdown]	

At the bottom right of the filter form, there are 'Search' and 'Clear' buttons.

**KEES is shared with the  
Clearinghouse.**

**As a result, there will be  
columns and areas that do  
not have the same  
importance to DCF as they  
do to other agencies.**



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.



**If you are currently working in the Lobby you will use the drop down option 'Lobby' under 'Contact type'.**

**Supervisor or Quarterbacks may choose to leave the Status blank to see all New and Assigned Task.**

After you have applied your search criteria  
click the Search button and receive the  
results.



## Task Inventory

► Refine Your Search

Results per Page: 25  

### Search Results Summary

Priority	Contact Type	Task	Rec'd Date	Status	Status Reason	Due Date	Queue	Wait Time	Work Time	Worker	Location	Review Due	Case Number	Case Name	App Id
<input type="checkbox"/> None		<a href="#">Review-Registration - 40005</a>	10/15/2013	New		11/05/2013	Orange-Blue								
<input type="checkbox"/> None		<a href="#">Application - 100144</a>	12/20/2013	New		12/31/2013	Green				Marysville Service Center				
<input type="checkbox"/> Expedited		<a href="#">Application - 100159</a>	12/23/2013	New		05/09/2041	Green				Fort Scott Service Center				
<input type="checkbox"/> None		<a href="#">Address Change - 100174</a>	12/30/2013	New		01/01/2014	Administrative				Topeka Service Center		20007640	Stephanie Romo	

- **KAECSES/KSCARES case numbers and case names will not appear on the Task Inventory page.**
- **You will not be able to search by a KAECSES/KSCARES case number or name.**
- **A blank case number and case name could mean there is a consumer to be seen for a new medical case and is not known to KEES.**

**Task Inventory**

► Refine Your Search

Results per Page: 25

Search Results Summary Results 1 - 4 of 4

Priority	Contact Type	Task	Rec'd Date	Status	Status Reason	Due Date	Queue	Wait Time	Work Time	Worker	Location	Review Due	Case Number	Case Name	App Id
<input type="checkbox"/> None		<a href="#">Review-Registration - 40005</a>	10/15/2013	New		11/05/2013	Orange-Blue								
<input type="checkbox"/> None		<a href="#">Application - 100144</a>	12/20/2013	New		12/31/2013	Green				Marysville Service Center				
<input type="checkbox"/> Expedited		<a href="#">Application - 100159</a>	12/23/2013	New		05/09/2041	Green				Fort Scott Service Center				
<input type="checkbox"/> None		<a href="#">Address Change - 100174</a>	12/30/2013	New		01/01/2014	Administrative				Topeka Service Center		20007640	Stephanie Romo	



You can claim task by checking the box next to the task and clicking Claim, this is not recommended.

You should look at the Task Details prior to Claiming.

## Task Inventory

► Refine Your Search

Results per Page: 25

Search Results Summary

Results 1 - 4 of 4

<input type="checkbox"/>	Priority	Contact Type	Task	Rec'd Date	Status	Status Reason	Due Date	Queue	Wait Time	Work Time	Worker	Location	Review Due	Case Number	Case Name	App Id
<input type="checkbox"/>	None		<a href="#">Review-Registration - 40005</a>	10/15/2013	New		11/05/2013	Orange-Blue								
<input type="checkbox"/>	None		<a href="#">Application - 100144</a>	12/20/2013	New		12/31/2013	Green				Marysville Service Center				
<input type="checkbox"/>	Expedited		<a href="#">Application - 100159</a>	12/23/2013	New		05/09/2041	Green				Fort Scott Service Center				
<input type="checkbox"/>	None		<a href="#">Address Change - 100174</a>	12/30/2013	New		01/01/2014	Administrative				Topeka Service Center		20007640	Stephanie Romo	

### Task Inventory

► Refine Your Search

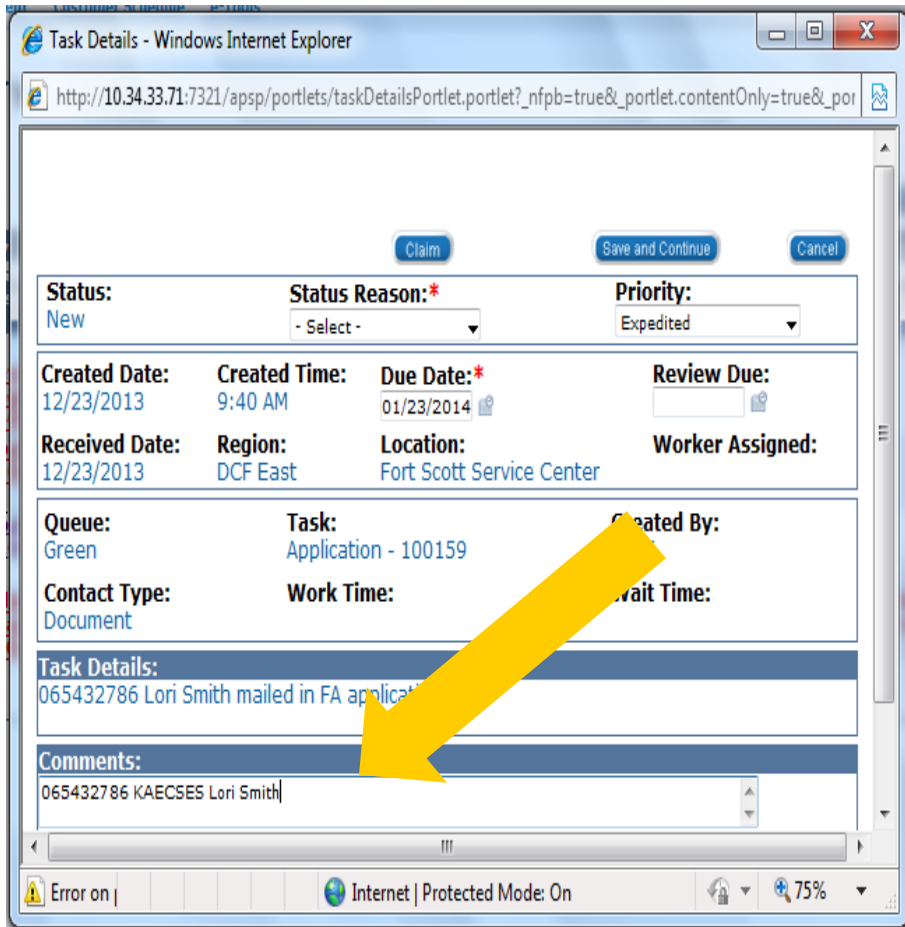
Results per Page: 25 Search Clear

Search Results Summary Results 1 - 4 of 4

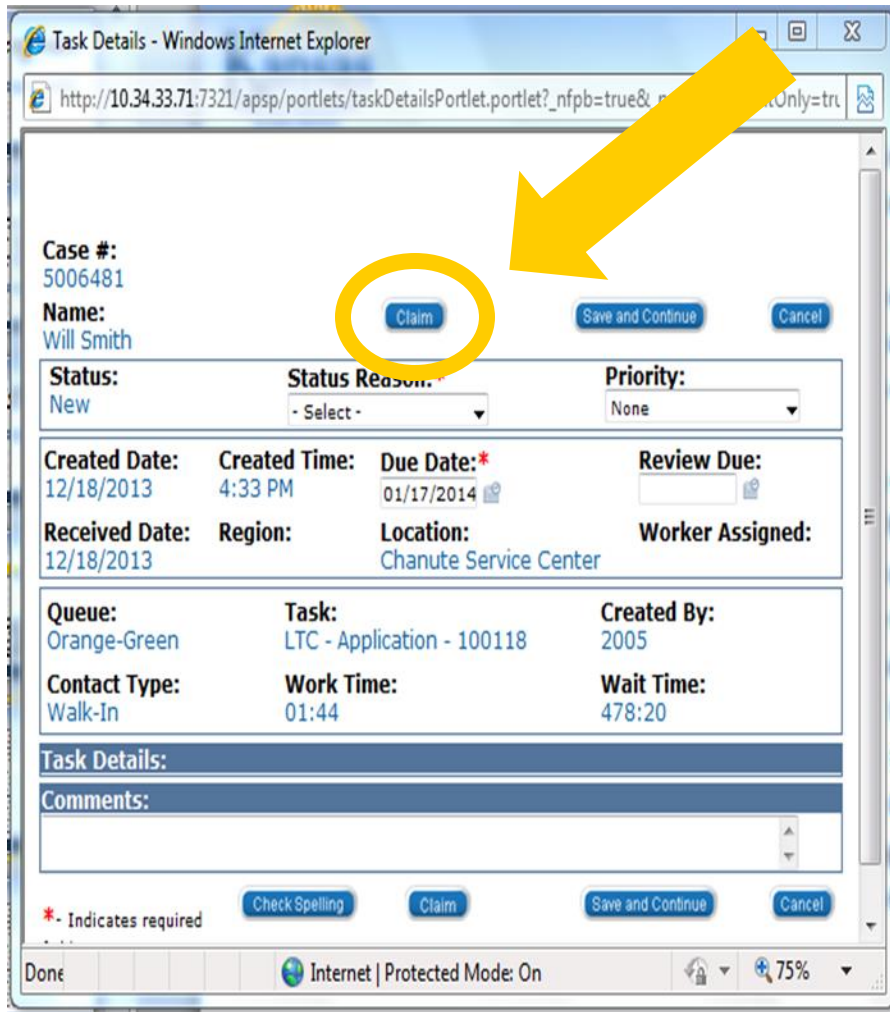
Priority	Contact Type	Task	Rec'd Date	Status	Reason	Due Date	Queue	Wait Time	Work Time	Worker	Location	Review Due	Case Number	Case Name	App Id
<input type="checkbox"/> None		<a href="#">Review-Registration - 40005</a>	10/15/2013	New		11/05/2013	Orange-Blue								
<input type="checkbox"/> None		<a href="#">Application - 100144</a>	12/20/2013	New		12/31/2013	Green				Marysville Service Center				
<input type="checkbox"/> Expedited		<a href="#">Application - 100159</a>	12/23/2013	New		05/09/2041	Green				Fort Scott Service Center				
<input type="checkbox"/> None		<a href="#">Address Change - 100174</a>	12/30/2013	New		01/01/2014	Administrative				Topeka Service Center		20007640	Stephanie Romo	

Claim Reassign

- You will need to click on the Task hyperlink to open the 'Task Details'.
- Clicking on the task name hyperlink will open the task without claiming the task.



- The Task Details window provides you with a summarized view of the details associated to the specific task.
- Any notes that were made specific to that task would also display under Task Details.
- This is where you would find the DCF case specific information such as case number and name under Comments.



**You will need to click on the 'Claim' button if you decide to claim the task.**



Based on the information on the Task Details window you can consider whether or not you have the training necessary to complete the task.

If you decide you cannot complete this task you just simply close out the window. The Task will return to the Queue.

If you claimed the Task in error, you should release the task back to the queue.

On the Task Portlet check the task and click the 'Release' button.

The Task is released back to the Queue and returned to its original status.

The screenshot displays the Kansas KEES system interface. The top navigation bar includes 'Journal', 'Tasks', 'Reminders', 'Contact Log', 'Logout', and 'Help'. Below this, a secondary navigation bar lists various modules: 'Case Info', 'Eligibility', 'Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Document Control', 'Admin Tools', and 'Worker Portal'. The main content area is divided into three sections: 'Reminders', 'Task Portlet', and 'Message Center'. The 'Task Portlet' section shows 'Assigned' tasks with a table containing one entry: 'Follow Up Call - 100173' with Case Number '20007640' and Due Date '01/01/2014'. The 'Status' is 'None'. A yellow arrow points to the 'Release' button in the task's action menu.

Task	Case Number	Status	Reason	Due Date	Action
<input type="checkbox"/> Follow Up Call - 100173	20007640	None		01/01/2014	<a href="#">Complete</a> <a href="#">Release</a>

You can also use  
the Release  
button from the  
Task Details  
window.

The screenshot shows a web browser window titled "Task Details - Windows Internet Explorer". The address bar contains the URL: [http://10.34.33.71:7211/apsb/portlets/taskDetailsPortlet.portlet?\\_nfpb=true&\\_portlet.contentOnly=true&\\_](http://10.34.33.71:7211/apsb/portlets/taskDetailsPortlet.portlet?_nfpb=true&_portlet.contentOnly=true&_)

The main content area displays the following information:

- Case #:** 5006830
- Name:** Mike Murray
- Status:** Assigned
- Status Reason:** - Select -
- Priority:** None
- Created Date:** 11/04/2013
- Created Time:** 6:53 PM
- Due Date:** 11/14/2013
- Review Due:** [empty field]
- Received Date:** 11/04/2013
- Region:** [empty field]
- Location:** DCA1
- Worker Assigned:** user user
- Queue:** Eligibility
- Task:** Remove HH Member - 200733
- Created By:** 2005
- Contact Type:** Inbound Call
- Work Time:** 1576:56
- Wait Time:** 00:00

Below the form fields, there are sections for "Task Details:" (PRATAP SECOND TIME 11/4/2013 6:53 PM) and "Comments:". At the top right of the form area, there are four buttons: "Complete", "Release" (highlighted with a yellow circle), "Save and Continue", and "Cancel".

The browser's status bar at the bottom shows "Internet | Protected Mode: On" and a zoom level of 75%.



**If you claim a task from the Task Details page, and there are other KEES Case tasks associated with that task and in the same queue, 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 window, or Task Inventory page by filtering by ‘assigned to me’.**



**Task can have  
4 possible status:**

New = Unclaimed Task

Assigned = Claimed Task

Complete = Processed Task

Rejected = Voided Task

**The functions available on the  
Task Details page depends on  
the status of the case.**

Task Details - Windows Internet Explorer  
http://10.34.33.71:7321/apsp/portlets/taskDetailsPortlet.portlet?\_nfpb=true&\_portlet.contentOnly=tru

Case #: 5006481  
Name: Will Smith  
Buttons: Claim, Save and Continue, Cancel

Status: New (circled in yellow)  
Status Reason: \* - Select -  
Priority: None

Created Date: 12/18/2013  
Created Time: 4:33 PM  
Due Date: \* 01/17/2014  
Review Due: [ ]

Received Date: 12/18/2013  
Region: [ ]  
Location: Chanute Service Center  
Worker Assigned: [ ]

Queue: Orange-Green  
Task: LTC - Application - 100118  
Created By: 2005

Contact Type: Walk-In  
Work Time: 01:44  
Wait Time: 478:20

Task Details:  
Comments: [ ]

\* - Indicates required  
Buttons: Check Spelling, Claim, Save and Continue, Cancel

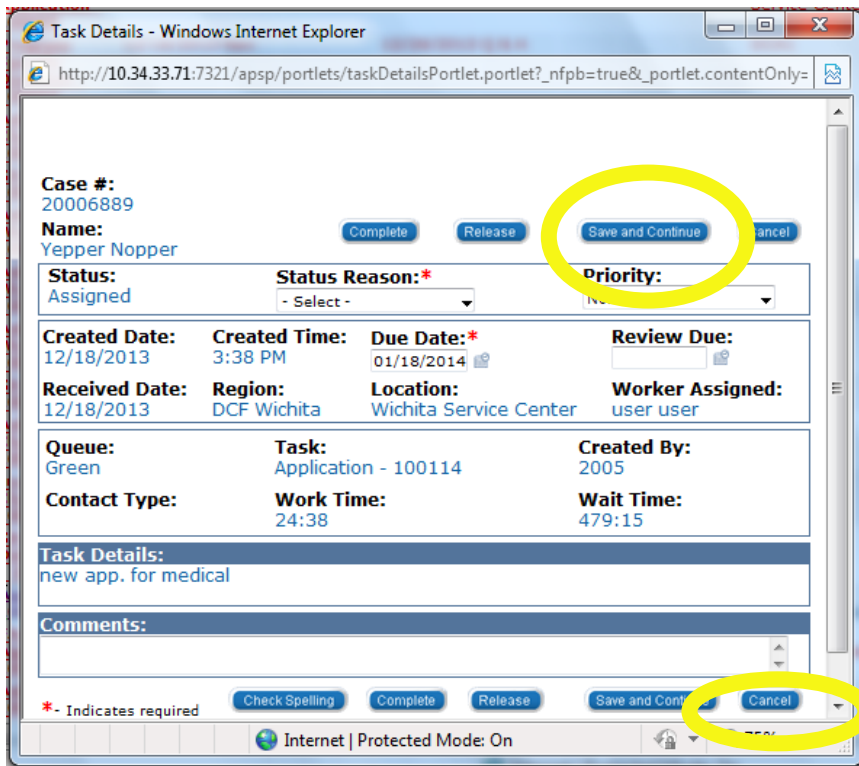
Done Internet | Protected Mode: On 75%

The Status of a task will impact what functionality is available on the Task Detail window.

***Status will need to be “New” to claim a Task.***

The screenshot shows the 'Task Details' window in Internet Explorer. A yellow box highlights the top section of the form. The 'Status' is set to 'New'. The 'Status Reason' is a dropdown menu with '- Select -' selected. The 'Priority' is set to 'None'. The 'Created Date' is 12/18/2013, 'Created Time' is 3:38 PM, 'Due Date' is 01/18/2014, and 'Review Due' is empty. The 'Name' is 'Yepper Nopper'. There are buttons for 'Claim', 'Save and Continue', and 'Cancel'. Below the highlighted area, there are fields for 'Queue' (Green), 'Task' (Application - 100114), 'Created By' (2005), 'Contact Type', 'Work Time' (24:32), and 'Wait Time' (479:15). The 'Task Details' section contains the text 'new app. for medical' and a 'Comments' section.

The screenshot shows the 'Task Details' window in Internet Explorer. A yellow box highlights the top section of the form. The 'Status' is set to 'Assigned'. The 'Status Reason' is a dropdown menu with '- Select -' selected. The 'Priority' is set to 'None'. The 'Created Date' is 12/18/2013, 'Created Time' is 3:38 PM, 'Due Date' is 01/18/2014, and 'Review Due' is empty. The 'Name' is 'Yepper Nopper'. There are buttons for 'Complete', 'Release', 'Save and Continue', and 'Cancel'. Below the highlighted area, there are fields for 'Queue' (Green), 'Task' (Application - 100114), 'Created By' (2005), 'Contact Type', 'Work Time' (24:38), and 'Wait Time' (479:15). The 'Task Details' section contains the text 'new app. for medical' and a 'Comments' section.



**The Save and Continue button will save any changes made to the editable fields and close the window.**

**The Cancel button will close the window and navigate back to the Task Inventory page.**



# Demo Task Inventory

# TASK PORTLET

**Case Number**  
Request ID

**Task Portlet**

Assigned

Total Assigned Tasks : 1  
Results 1 - 1 of 1

Task	Case Number	Status Reason	Due Date	Priority
<input type="checkbox"/> Follow Up Call - 100173	20007640		01/01/2014	None

**Message Center**

Search Messages View  
Most Recent Messages

Subject	Type	From	Received	Flag
---------	------	------	----------	------

[Inbox](#) | [Sent](#) | [Archive](#) | [Compose](#)

**The Task portlet is available on the  
KEES Home page.**

**This portlet shows tasks that are  
currently assigned to you, which,  
compared to the current tracker,  
makes catching cases that you  
claimed but not updated easier to  
update.**



Clicking the box to the left of the Task title will mark that particular task to either be Completed or Released.

The screenshot displays the Kansas KEES (Kansas Employment and Support System) interface. The top navigation bar includes links for Journal, Tasks, Reminders, Contact Log, Logout, and Help. Below this, a secondary menu contains Case Info, Eligibility, Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. The main content area is divided into three sections: a search box on the left, a central task list, and a message center on the right. A yellow arrow points to a checkbox in the task list, and a yellow circle highlights the 'Complete' and 'Release' buttons for that task.

**Reminders**

Type	Description	Date
<a href="#">Clear Selected</a> <a href="#">View All</a> <a href="#">Add Reminder</a>		

**Task Portlet**

Assigned [Add Task](#) [View All](#)

Total Assigned Tasks : 1  
Results 1 - 1 of 1

Task	Case Number	Status Reason	Due Date	Priority
<input type="checkbox"/> Follow Up Call - 100173	20007640			

[Complete](#) [Release](#)

**Message Center**

[Search Messages View](#)  
[Most Recent Messages](#)

Subject	Type	From	Received	Flag
<a href="#">Inbox</a>   <a href="#">Sent</a>   <a href="#">Archive</a>   <a href="#">Compose</a>				

# Do not use the Complete button functions from the Task Portlet.

Updating the task with complete from the 'Task Portlet' allows you to complete a task without giving it a 'Status Reason' of Pending, No Show, or Complete.

The screenshot displays the Kansas KEES system interface. The top navigation bar includes links for Journal, Tasks, Reminders, Contact Log, Logout, and Help. Below this, a secondary navigation bar contains Case Info, Eligibility, Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. The main content area is divided into three sections: Reminders, Task Portlet, and Message Center. The Task Portlet section shows a table of assigned tasks. A red circle highlights the 'Complete' button for the task 'Follow Up Call - 100173' with Case Number 20007640.

Task	Case Number	Status Reason	Due Date	Priority
<input type="checkbox"/> Follow Up Call - 100173	20007640		01/07/2014	None



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. You should check your Task Portlet periodically throughout the day and every night before logging out.



The screenshot shows the 'Task Portlet' interface. At the top, it says 'Assigned' with 'Add Task' and 'View All' buttons. Below that, it indicates 'Total Assigned Tasks : 4' and 'Results 1 - 4 of 4'. The main part of the interface is a table with the following columns: Task, Case Number, Status Reason, Due Date, and Priority. There are four rows of tasks listed, each with a checkbox to its left. At the bottom right of the table area, there are 'Complete' and 'Release' buttons.

Task	Case Number	Status Reason	Due Date	Priority
<input type="checkbox"/> <a href="#">Assign Case Worker - 60188</a>			12/10/2013	None
<input type="checkbox"/> <a href="#">Assign Case Worker - 60192</a>			12/10/2013	None
<input type="checkbox"/> <a href="#">LTC - Application - 100118</a>	<a href="#">5006481</a>		01/17/2014	None
<input type="checkbox"/> <a href="#">Application - 100114</a>	<a href="#">20006889</a>		01/18/2014	None



**LET'S  
PRACTICE**

# **TASK PORTLET**

## View and Claim

# TASK Management

While in the context of a KEES Case, click Task in the Utility Navigation Bar.

The Task Management window will appear.

The screenshot displays the KEES Case Management System interface. The main window shows a 'Case Summary' for 'BECKY BOWERS' with case number '20007912'. The 'Utility Navigation Bar' at the top includes tabs for 'Case Info', 'Eligibility', 'Services', 'Child Care', 'Resource Database', 'Fiscal', 'Special Units', 'Reports', 'Document Control', 'Admin Tools', and 'Worker Portal'. The 'Tasks' tab in the 'Admin Tools' section is highlighted with a yellow circle. A 'Task Management' window is open in the foreground, showing a table of tasks for case 20007912. The table has columns for 'Task', 'Queue', 'Received Date', 'Status', and 'Actions'. Below the table, there are sections for 'Assigned Tasks' and 'e-Applications'.

**Task Management - Windows Internet Expl...**  
http://10.34.33.71:7321/apsp/portlets/taskManagement.po

**Task Management**

**Case 20007912 Tasks:** [Add Task](#)

Task	Queue	Received Date	Status	Actions
No Results				

**Assigned Tasks:**

Task	Queue	Name	Status Reason	Actions
<a href="#">Application</a>	Green	Yepper Nopper - 20006889		<a href="#">Release</a> <a href="#">Complete</a> <a href="#">Void</a>

**e-Applications**

e-App Number	Applicant Name	Expedited Services	Recertification/Renewal	Application Date	e-App Status
<a href="#">1003664</a>	BOWERS, BECKY	No	No	12/12/2013	In Progress

This page is used to see all tasks assigned to the current KEES case.

It also shows all of the tasks currently assigned to you.

Task Management - Windows Internet Explorer  
http://10.34.33.71:7211/apsp/portlets/taskManagement.portlet?\_nfpb=t

Task Management

Case 5006399 Tasks: [Add Task](#)

Task	Queue	Received Date	Status	Actions
<a href="#">Change</a>	Orange-Purple	01/09/2014	New	<a href="#">Claim</a> <a href="#">Void</a>

Assigned Tasks:

Task	Queue	Name	Status Reason	Actions
<a href="#">DCF Application Form</a>	Data Entry			<a href="#">Release</a> <a href="#">Complete</a> <a href="#">Void</a>

Internet | Protected Mode: On 75%

If there are Task associated to this case from a different Queue and not already assigned to you, claim and work those Tasks also.

Remember, when you claim a task KEES only auto assign other case task if they are in the same QUEUE.

- BPM principles should also be applied when working within KEES. Making sure you have completed all work on cases eliminates re-work and applies one touch principles.

**Task Management can also be used as a reference when a consumer calls into the office.**

**After you find the KEES case, open the Task Management window it will show you all tasks associated with the case, as well as the queue where the task is currently housed.**

# TASK MANAGEMENT





***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 a Non-Medical case during Phase 2.***



**When you have claimed a Task it is your responsibility for searching if there are any new images on a KEES case or a NON Medical case. If there are new images you need to look at the images to confirm you have completed all work and all documents have been accounted for (One Touch Resolution).**



**Image Now training has been provided, refer to your Imaging: Quick Search Job Aid**



# Updating TASK

After claiming and working a task, you must consider whether or not the task is finished. You will need to choose a 'Status Reason' to reflect the action taken on the task.

Task Details - Windows Internet Explorer

http://10.34.33.71:7321/apsp/portlets/taskDetailsPortlet.portlet?\_nfpb=true&\_portlet.contentOnly=

Case #: 20006889

Name: Yepper Nopper

Status: Assigned

Status Reason: \*  
- Select -

Priority: [Dropdown]

Created Date: 12/18/2013  
Created Time: 3:38 PM  
Due Date: \* 01/18/2014

Received Date: 12/18/2013  
Region: DCF Wichita  
Location: Wichita Service Center  
Worker Assigned: user user

Queue: Green  
Task: Application - 100114  
Created By: 2005

Contact Type:  
Work Time: 24:38  
Wait Time: 479:15

Task Details:  
new app. for medical

Comments:

\* - Indicates required

Check Spelling Complete Release Save and Continue Cancel

Internet | Protected Mode: On 75%

## ***Status Reasons:***

**Complete** – The task has been finished and the client's request has been resolved.

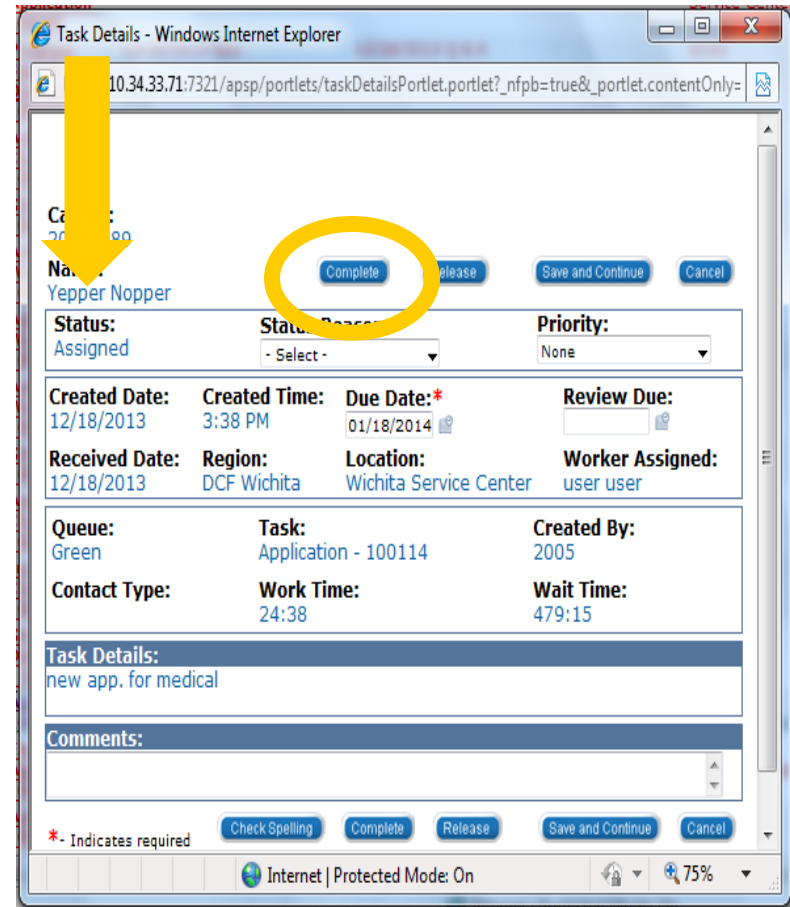
**Pending** – The task has been worked as far as possible and the clients request has not been resolved.

**No Show** – An interview was attempted but was unable to complete. No Show indicates the non-lobby cold call was attempted but not completed; and for lobby indicates the client left prior to completing an interview.

Use the hyperlinks on either the 'Task Portlet', 'Task Inventory' or 'Task Management' to access the Task assigned to you.

Update Tasks with a 'Status Reason' prior to clicking the Complete button.

Repeat until all Tasks have been updated with a Status Reason.



**This will change the status from Assigned to Complete.**

**The Priority and Comments fields may also be edited.**

**Click Save and Continue if you are only editing the Priority or Comments fields.**

Task Details - Windows Internet Explorer

http://10.34.33.71:7321/apsp/portlets/taskDetailsPortlet.portlet?\_nfpb=true&\_portlet.contentOnly=

Case #: 20006889

Name: Yepper Nopper

Status: Assigned

Status Reason: \*

Priority: None

Review Due: 01/18/2014

Received Date: 12/18/2013

Region: DCF Wichita

Location: Wichita Service Center

Worker Assigned: user user

Queue: Green

Task: Application - 100114

Created By: 2005

Contact Type:

Work Time: 24:38

Wait Time: 479:15

Details: app. for medical

Comments:

\* Indicates required

Check Spelling Complete Release Save and Continue Cancel

Internet | Protected Mode: On 75%



# **GENERAL RULE**

**You always want to update the Status Reason, using the ‘Task Detail’ window, after working it.**

**Tasks that have been completed without a status reason will no longer display in the queue and will not be included in reports that provide measurements of work from BPM.**







# Updating TASK With a 'Status Reason'



# Reassigning and Voiding Task

# Reassign Task Functionality

KEES provides the ability to reassign a task to a different queue, worker, location, or case by selecting the task from the Task Inventory page and clicking the 'Reassign' button.

The screenshot displays the 'Reassign Tasks' interface in the KEES system. The top navigation bar includes the Kansas logo and various menu items like 'Journal', 'Tasks', 'Reminders', 'Contact Log', 'Logout', and 'Help'. Below this is a secondary navigation bar with tabs for 'Case Info', 'Eligibility', 'Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Document Control', 'Admin Tools', and 'Worker Portal'. The main content area is titled 'Reassign Tasks' and features a sidebar on the left with options for 'Case Number', 'Request ID', 'Person Search', and 'Access List'. The main area is divided into four sections: 'Queues', 'Worker', 'Location', and 'Case'. Each section shows a task 'FA/Medical-Application - 200878' with its current assignment and a 'Received Date' of '2013-11-05 00:00:00.0'. Below each task entry is a 'Change' button (e.g., 'Change Queue to:', 'Change Worker to: Select', 'Change Location to:', 'Change Case to: Select') and a dropdown menu for selection. At the bottom right, there are 'Save and Continue' and 'Cancel' buttons.

Task	Queue	Received Date
FA/Medical-Application - 200878	Green	2013-11-05 00:00:00.0

Task	Worker	Received Date
FA/Medical-Application - 200878		2013-11-05 00:00:00.0

Task	Location	Received Date
FA/Medical-Application - 200878	Pittsburg Service Center	2013-11-05 00:00:00.0

Task	Case	Received Date
FA/Medical-Application - 200878		2013-11-05 00:00:00.0

- Select the task that needs to be updated by highlighting it.
- Click the Reassign button
- Click Save and Continue

The screenshot shows a software interface for 'Reassign Tasks'. The interface includes a navigation bar at the top with tabs for 'Case Info', 'Eligibility', 'Emp. Services', 'Child Care', 'Resource Database', 'Fiscal', 'Special Staff', 'Reports', 'Document Control', and 'Admin Tools'. Below this is a secondary navigation bar with 'Workload Inventory' selected, along with other options like 'Case Summary', 'Customer Information', 'Reporting', 'Distributed Documents', 'Customer Schedule', and 'Courtesy Month'.

The main content area is titled 'Reassign Tasks' and contains four sections, each with a table and a 'Change' button:

- Queues:** A table with columns 'Task', 'Queue', and 'Received Date'. The second row is highlighted. Below the table is a 'Change Queue to:' dropdown menu.
- Worker:** A table with columns 'Task', 'Worker', and 'Received Date'. The second row is highlighted. Below the table is a 'Change Worker to:' dropdown menu.
- Location:** A table with columns 'Task', 'Location', and 'Received Date'. The second row is highlighted. Below the table is a 'Change Location to:' dropdown menu.
- Case:** A table with columns 'Task', 'Case:', and 'Received Date'. The second row is highlighted. Below the table is a 'Change Case to:' dropdown menu.

At the bottom right of the interface, there are two buttons: 'Save and Continue' and 'Cancel'.

# Possible scenarios for when you would Reassign a Task:

A case with conflict of interest. For example, the application belongs to someone in the same office. The Task can be Reassigned to a different office location to be worked.

ICTs should be worked before transferring a case, but in rare circumstance, existing tasks could be Reassigned 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.

# **Not all users will have the ability to Void tasks.**

- **Occasionally a task is unnecessary and needs to be voided. Selecting the Task from the Task Inventory or Task Management windows and clicking the Void button will change the status to Rejected.**

**Tasks can NOT be recovered once they are voided.**





# Questions?