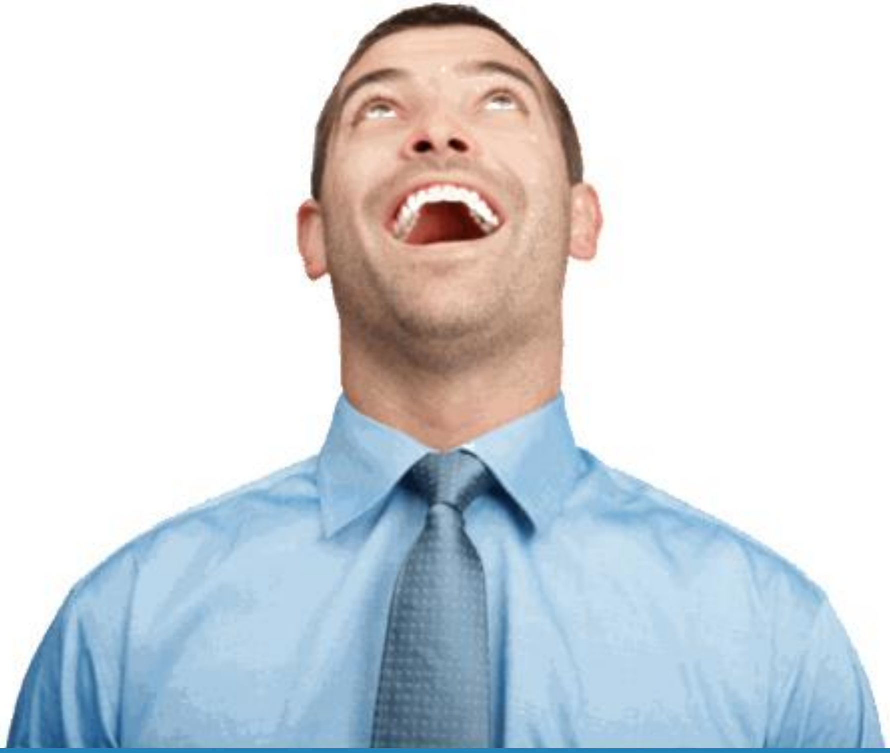
Task



Create TASK

Filter TASK

View TASK

Claim TASK

Release TASK

Update TASK

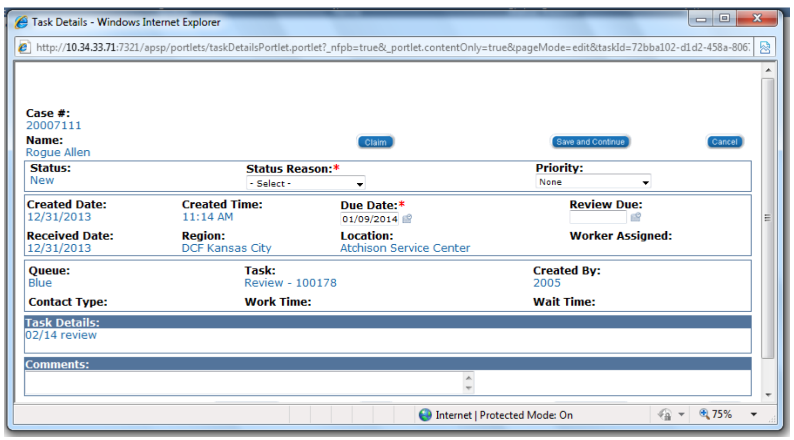
Reassign TASK

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.

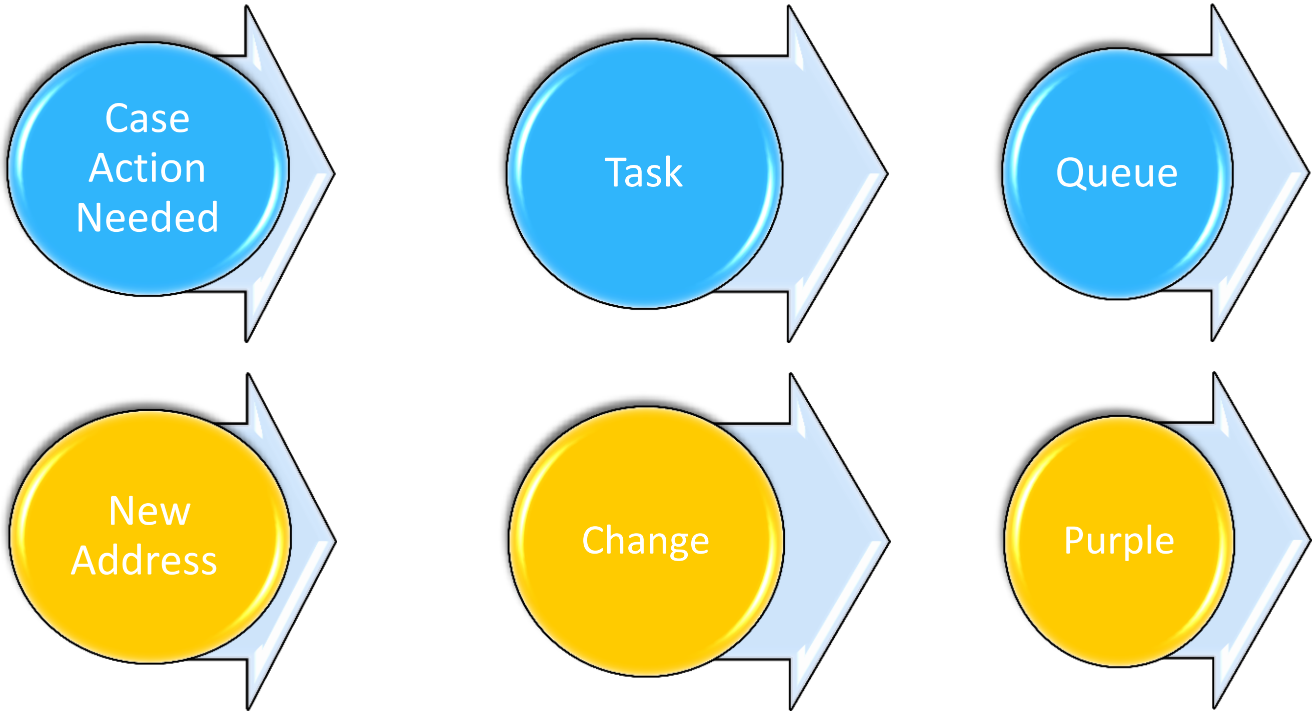
KEES will produce system generated tasks, much like KAECSES.



- 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

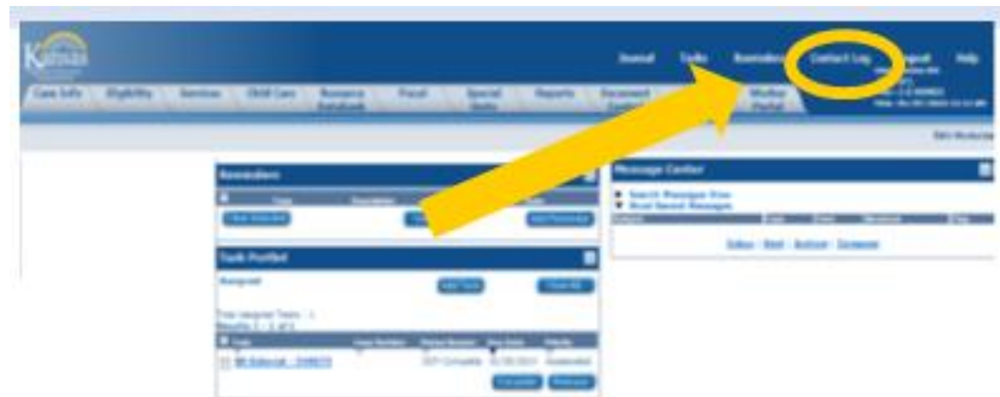
Always, person search in KEES when creating a task even if the work to be completed is for a Non-Medical program.

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.

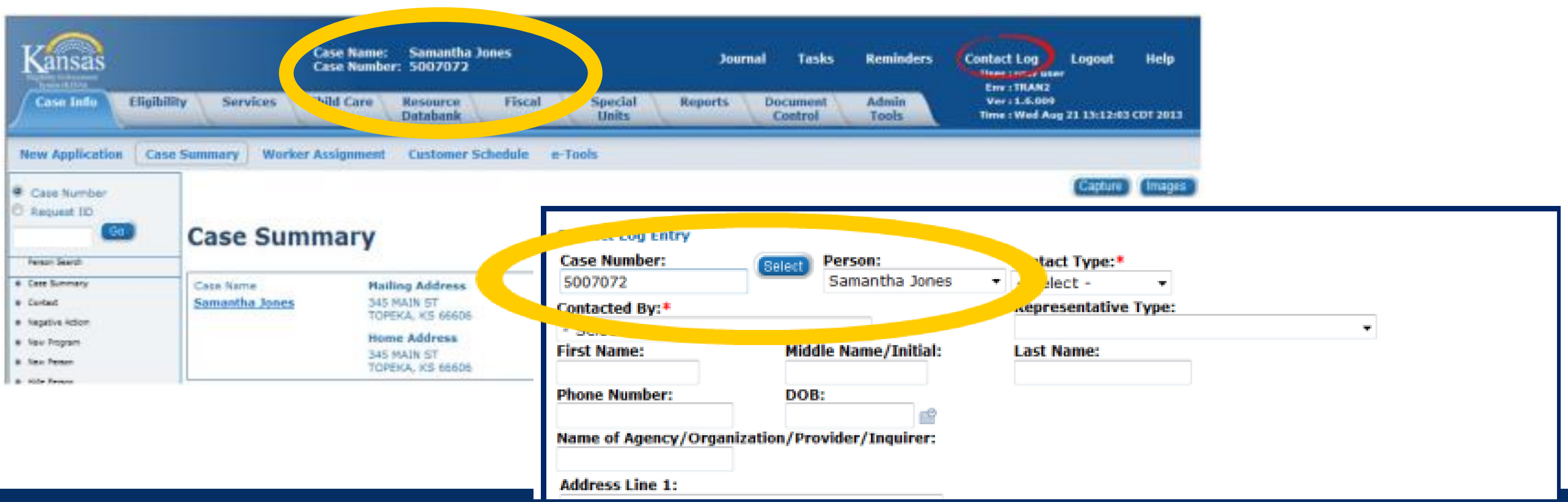
Creating a Task

Contact Log



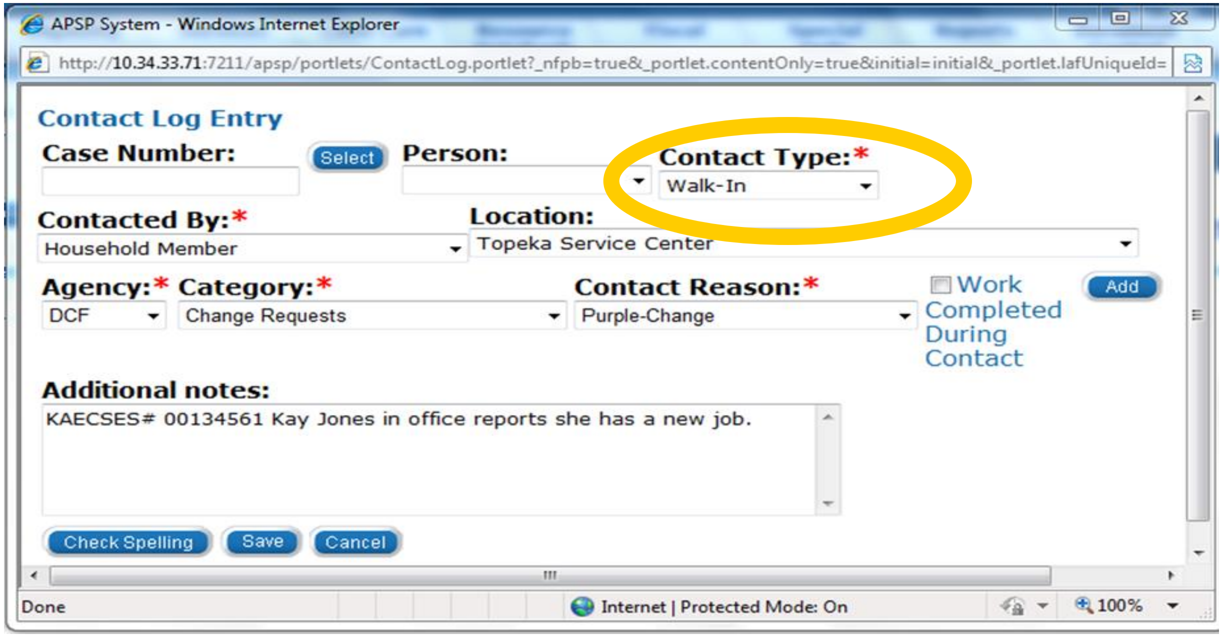
From any KEES page you will click ‘**Contact Log**’ in the Navigation Bar. This will open a window for ‘**Contact Log**’ entry.

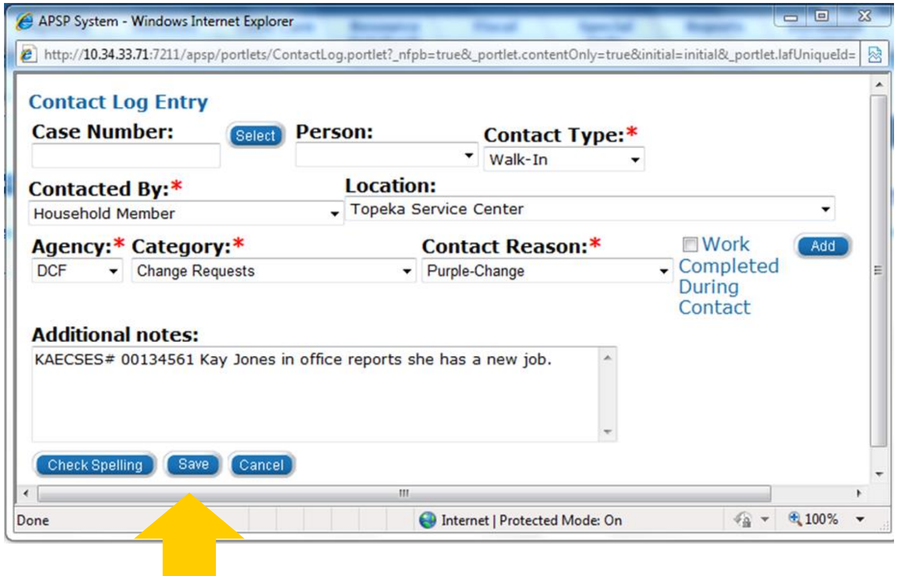
If you are already in the context of a KEES case the case number and person drop-down will be pre-populated. If you are not in the context of a KEES case the Contact Log will be blank this is how you would enter your Non Medical Case information.

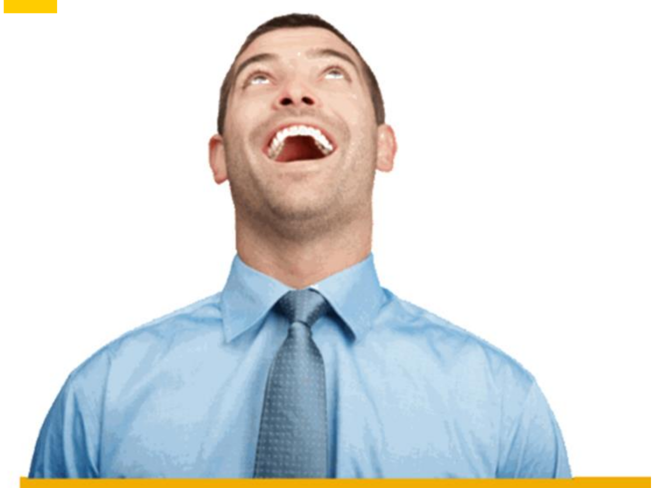


The Contact Log is similar to the "Add New Client Request" button on our current tracker.

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





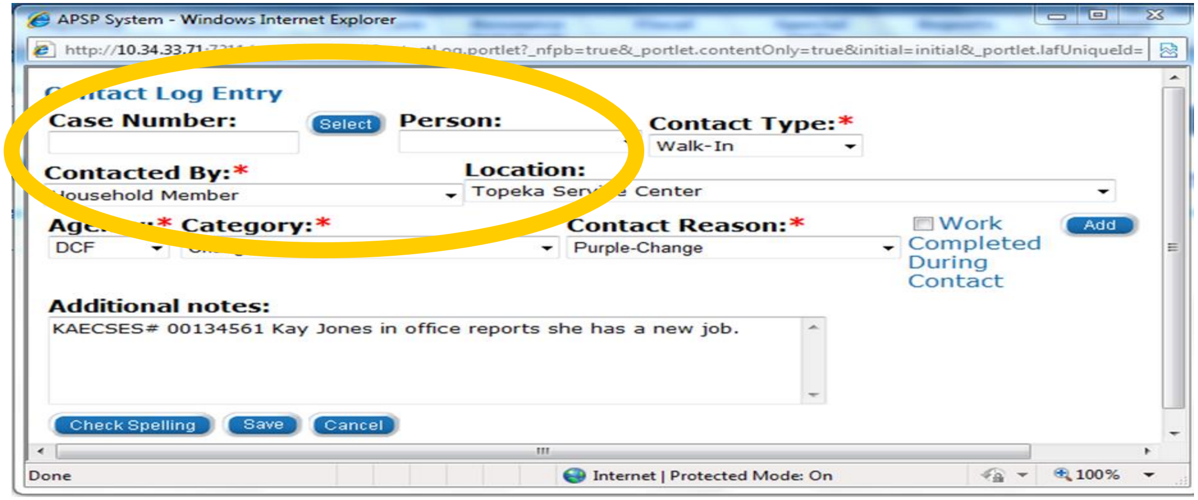


When using the 'Contact Log' use the drop down options to capture information:

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

and CLICK SAVE

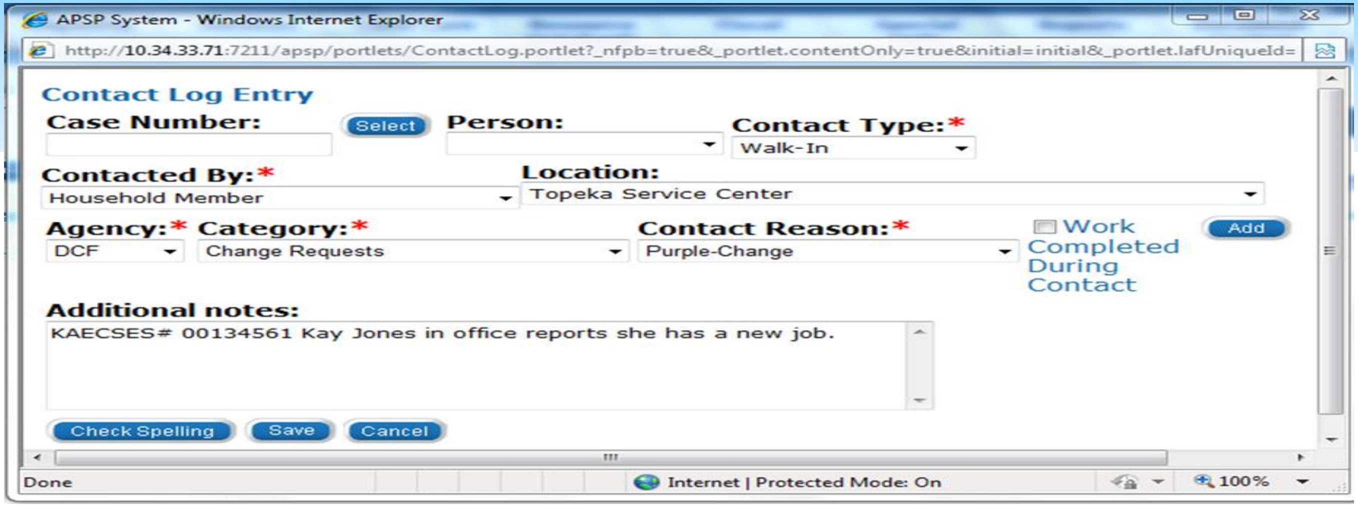
KEES uses this information entered to automatically create a task and assign it to the correct queue.



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

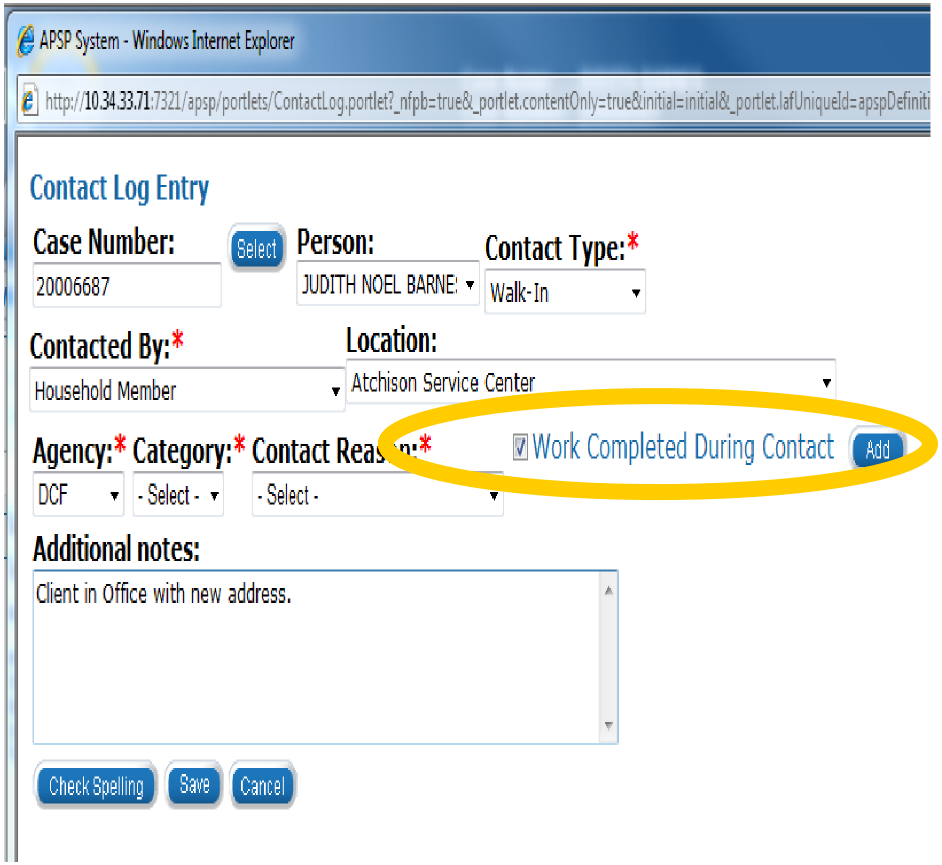
Staff using the Contact Log for a Non-Medical case should enter the KAECSES/KSCares Case Number and Case Name in the additional notes as shown.

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



- 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.



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.

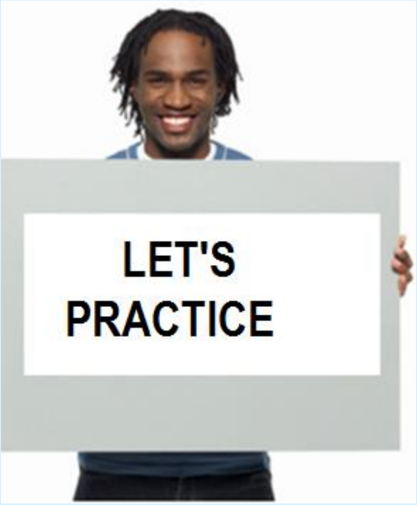
Kansas
Eligibility Enforcement System (KEES)

JOB AID: DCF Tasks

Table of Contents

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 KAECSES 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 KAECSES 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’

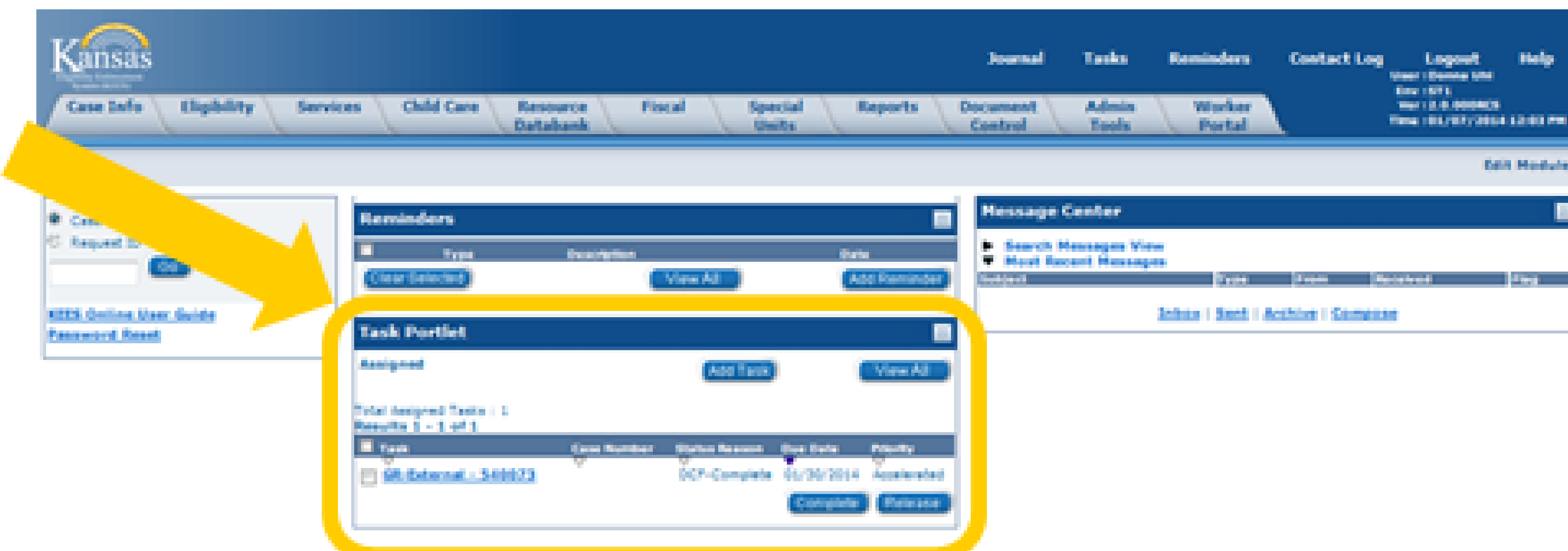
Creating a Task

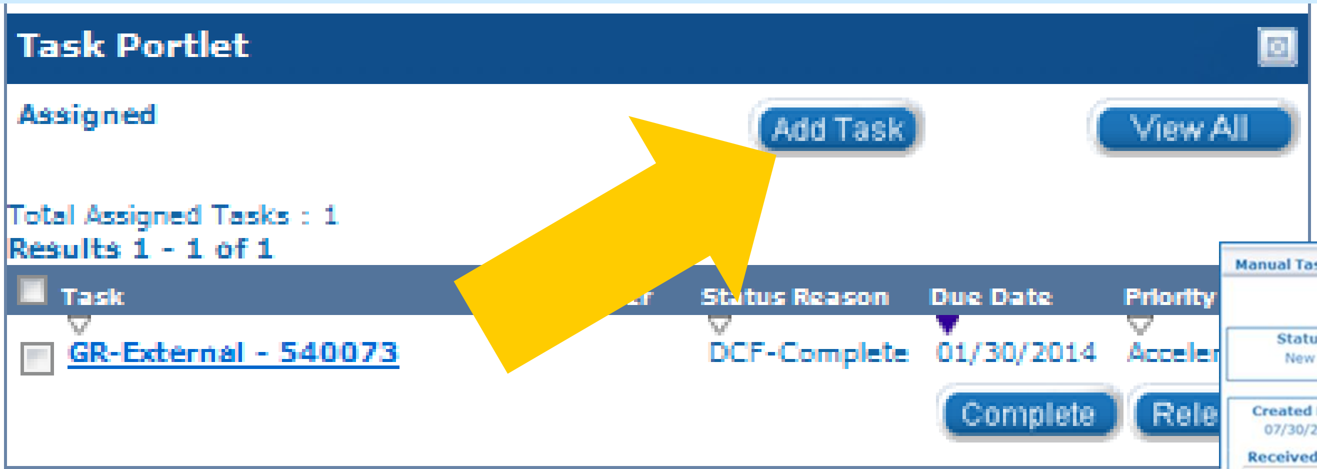
Task Portlet

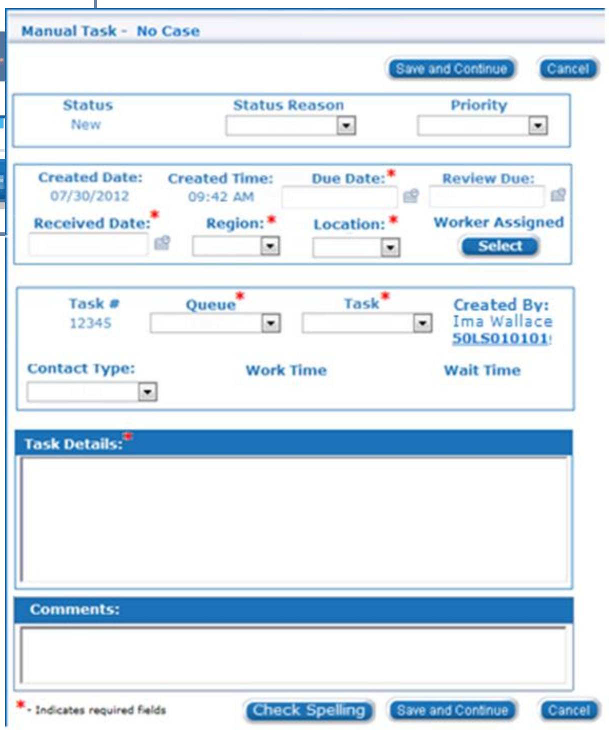
Use the Task Portlet when adding a Task to a

Non-Medical Case.

Access the Task Portlet from the KEES Home Page.







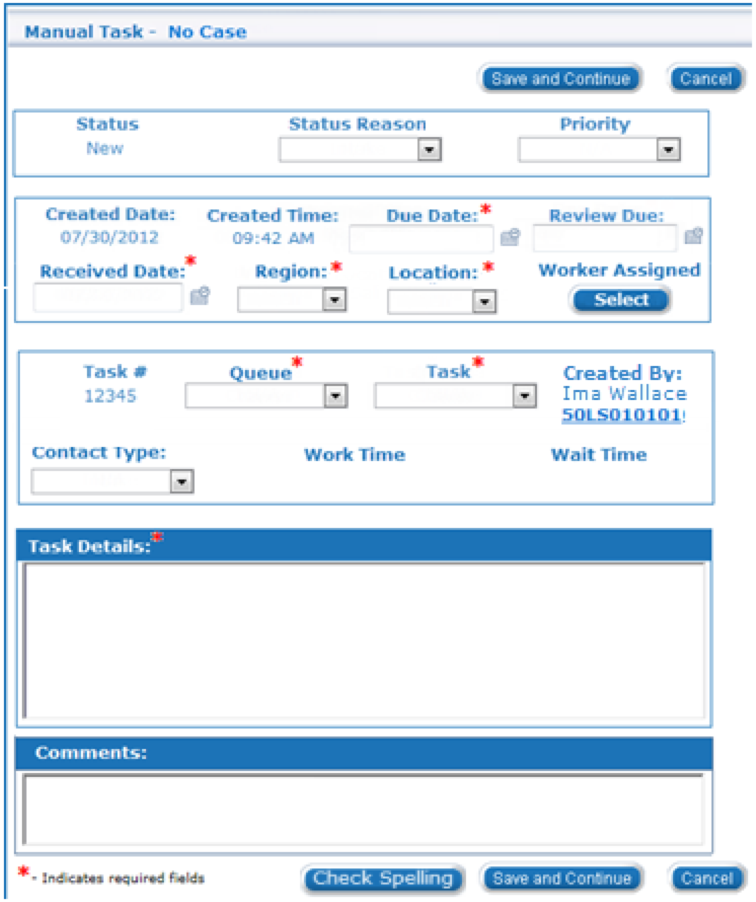
Inside the Task Portlet you will click the 'Add Task' Button.

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

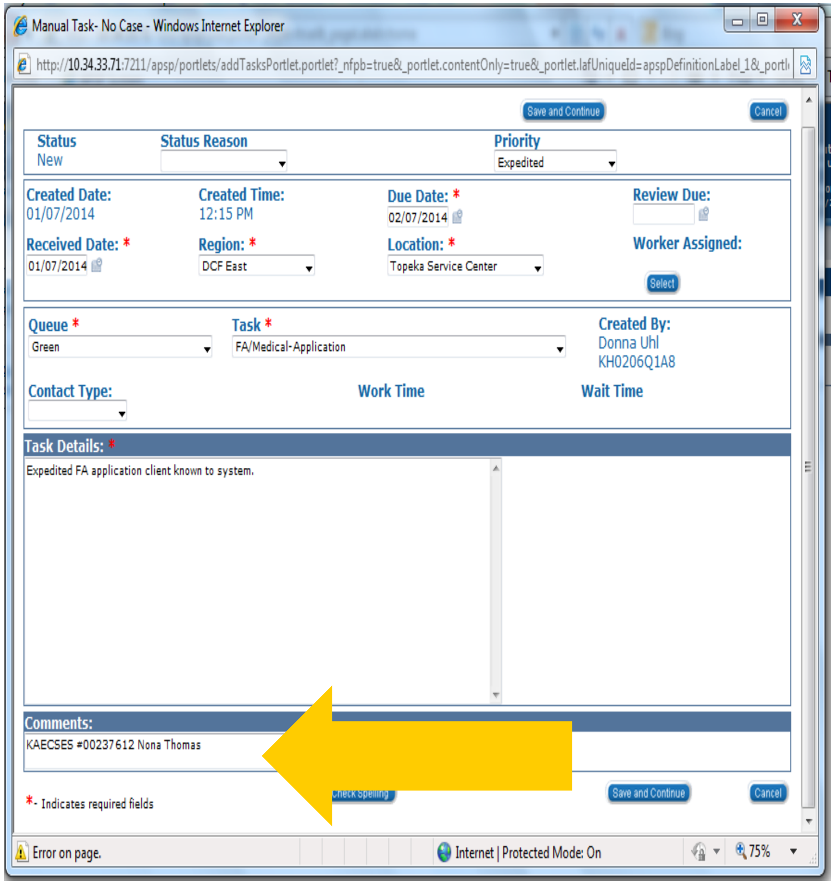
Using the drop down options select 'Priority' if appropriate.

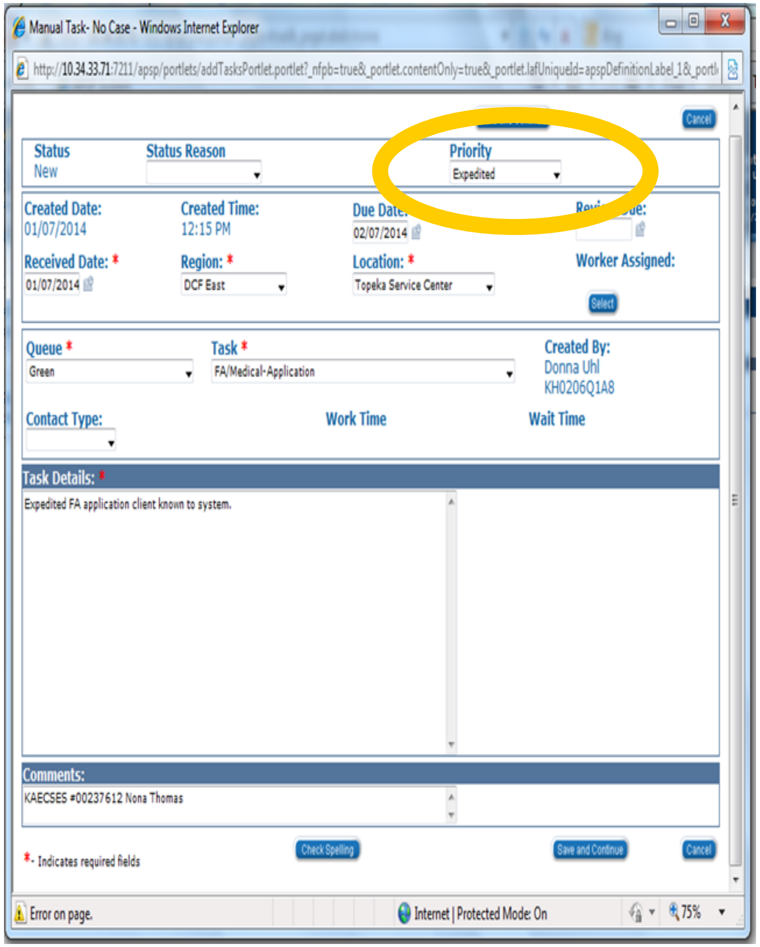
Enter a Due Date, Review Due and Received Date in MM/DD/YYYY format.

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



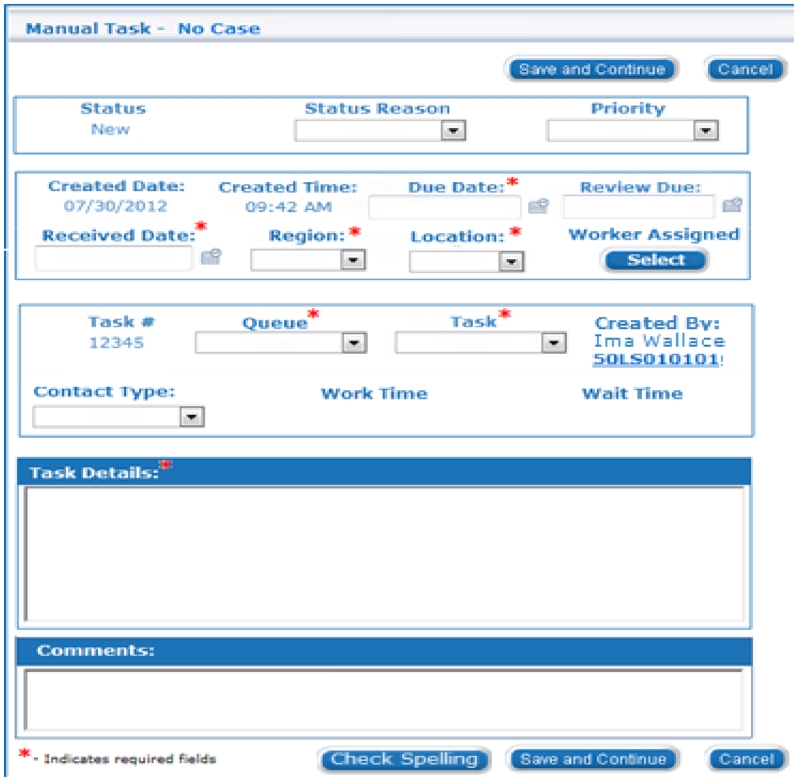
- Enter Task Details
- Enter the KAECSES/KSCares cases number and case name in the Comments Section.
- Use the Check Spelling function.
- Click Save and Continue.





- 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



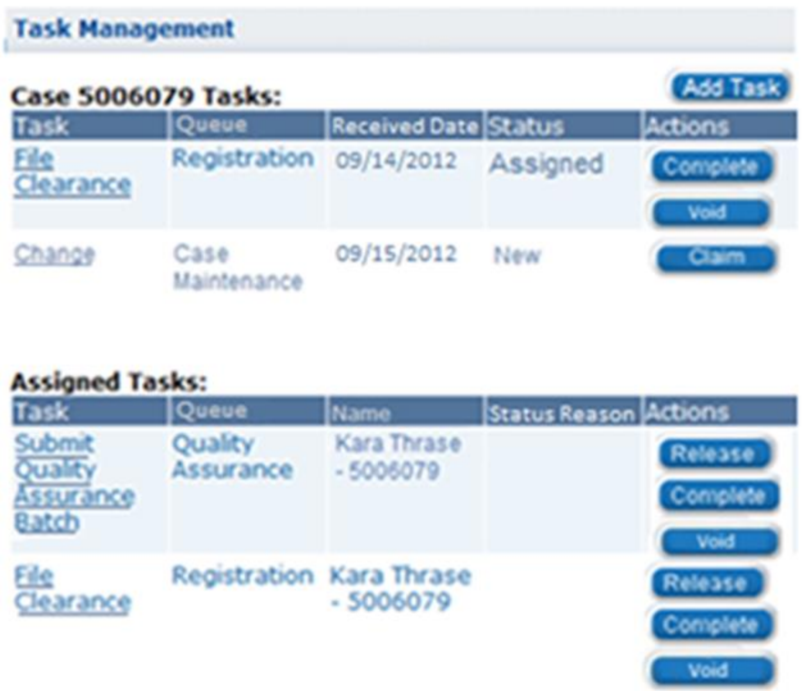
When creating a manual task the fields must be entered in sequence or the drop-down options will not display correctly.

Items with a Red Asterisk are mandatory.

Scenario 2

Sarah mails in a Food Assistance and TANF application. **Jack registers the application in KAECSES 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 KAECSES 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.

Task Management



Task Management

Case 5006079 Tasks:

Add Task

Task	Queue	Received Date	Status	Actions
File Clearance	Registration	09/14/2012	Assigned	Complete Void
Change	Case Maintenance	09/15/2012	New	Claim

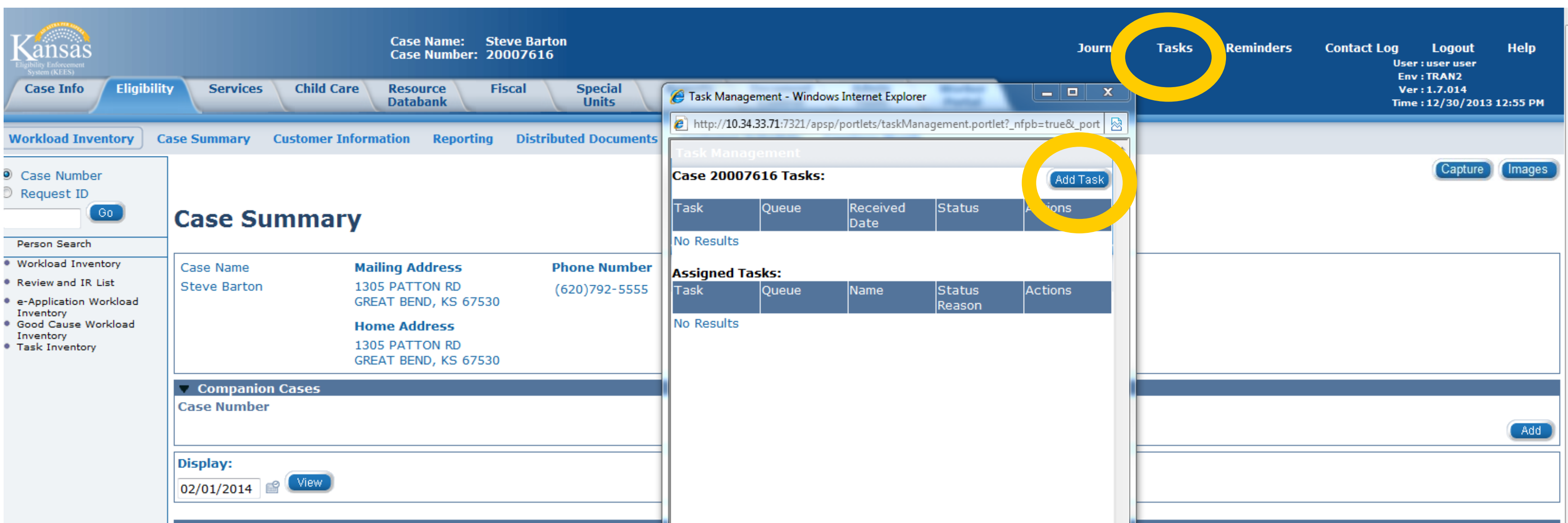
Assigned Tasks:

Task	Queue	Name	Status Reason	Actions
Submit Quality Assurance Batch	Quality Assurance	Kara Thrase - 5006079		Release Complete Void
File Clearance	Registration	Kara Thrase - 5006079		Release Complete Void

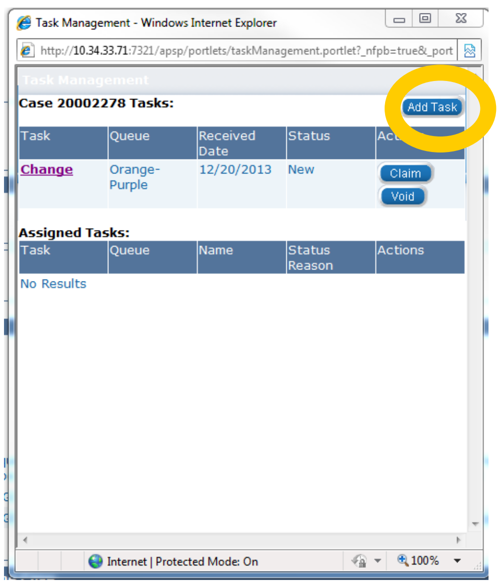
Use the Task Management window to add a Task to a **KEES Case**

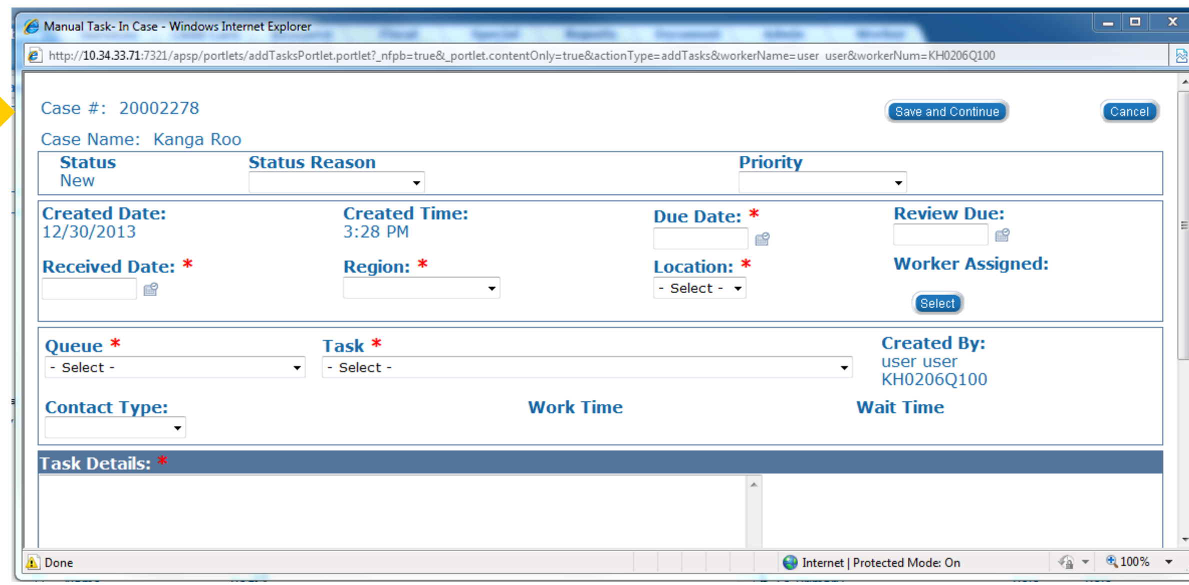
From any KEES page, click ‘**Tasks**’ in the Utility navigation bar.

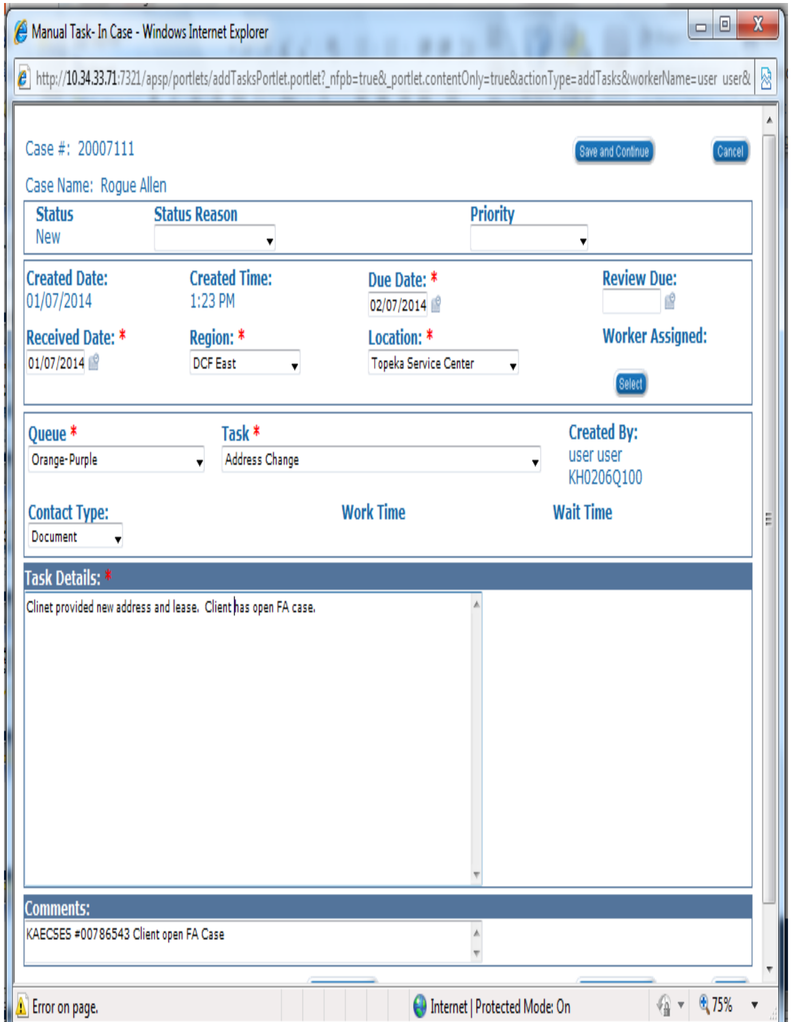
This will result in a ‘**Task Management**’ window where you can add tasks while in the context of a specific KEES Case.



You will click the ‘Add Task’ button to access the Manual Task In Case window.



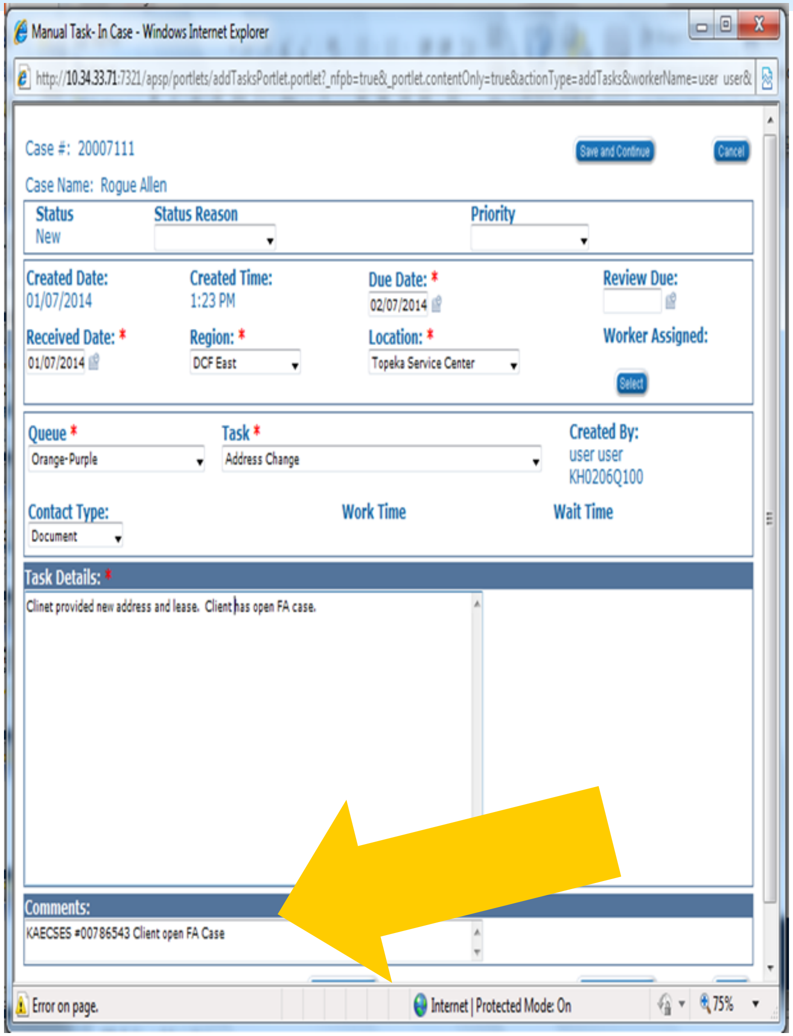




Using the drop down options select 'Priority' if appropriate.

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.



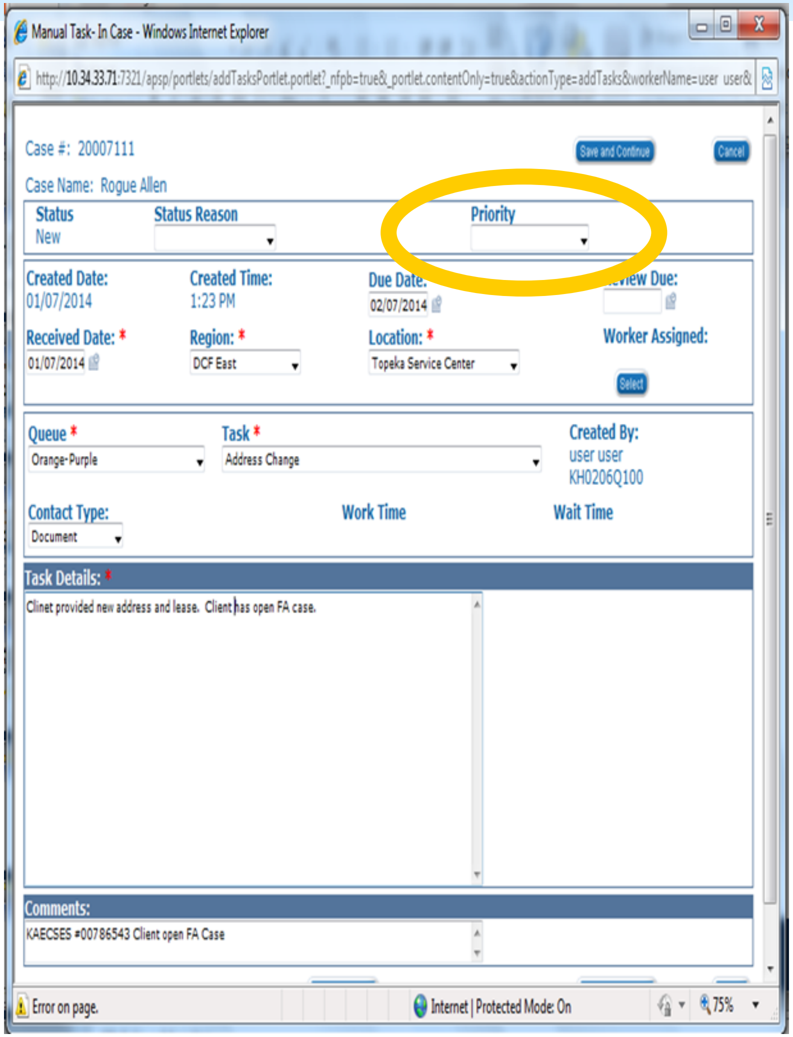
- Enter Task Details

Enter the KAECSES/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!



- 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

Scenario 3

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.

Creating a Future Task

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

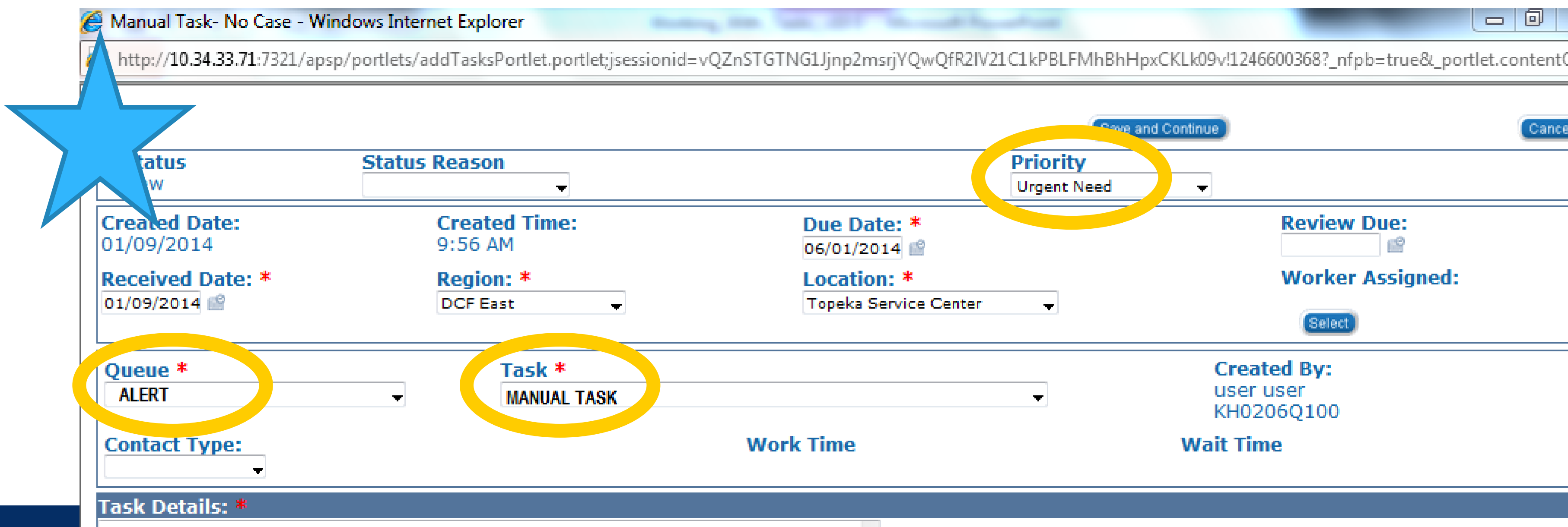
This step is just like setting a due date on WOAL in KAECSES. Use the same logic for determining due dates for alerts in KAECSES.

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.

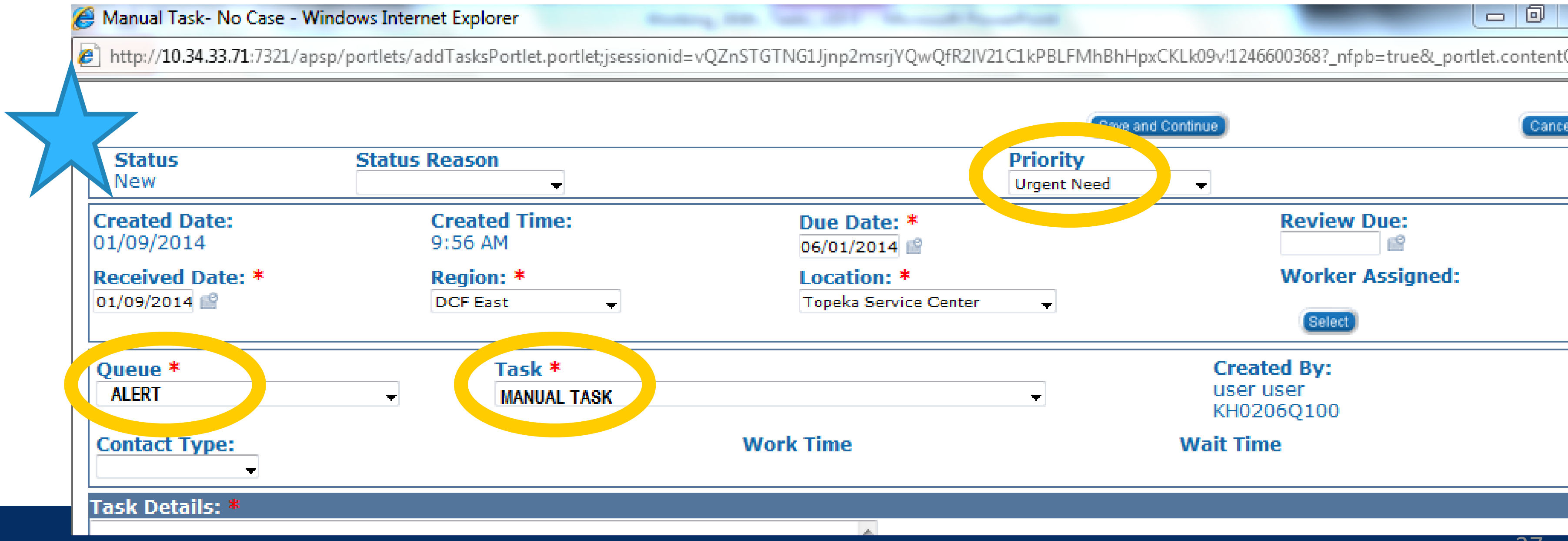
ORANGE PURPLE TEAM - Give them a task priority code of 'Urgent Need' when creating a future task.



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'.

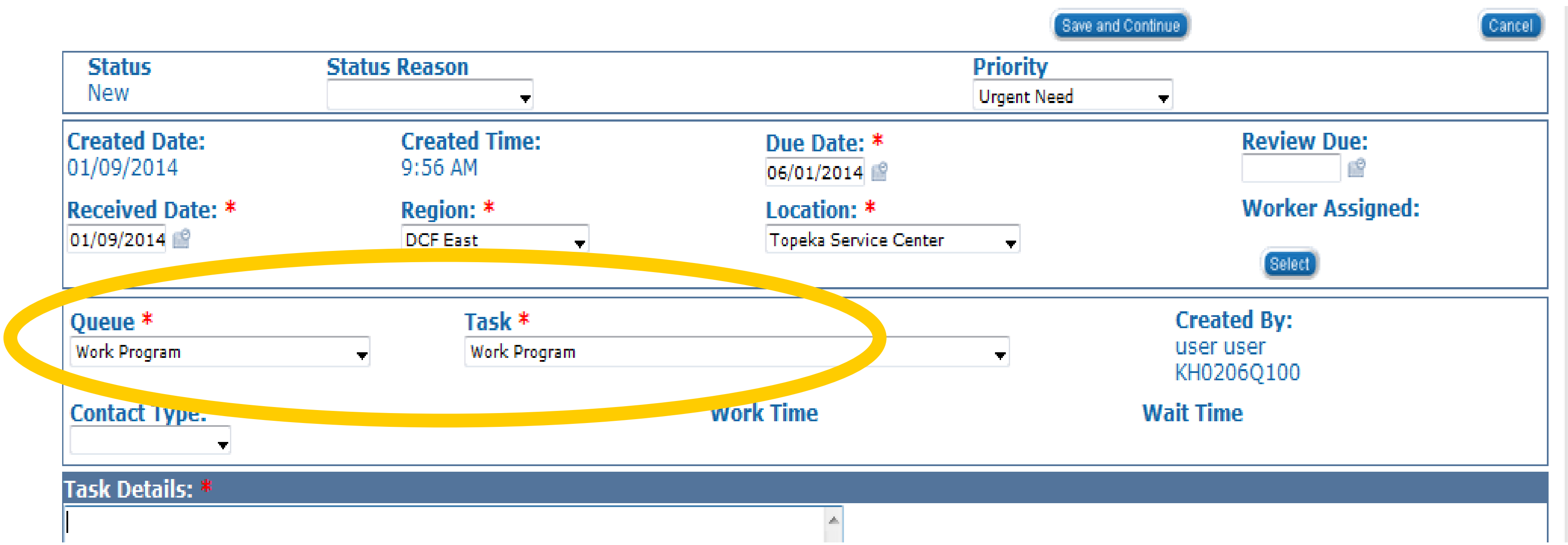
This is very important because it takes all Future Task out of current reports for BPM statistics.



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.



Where can I view, filter, claim task?

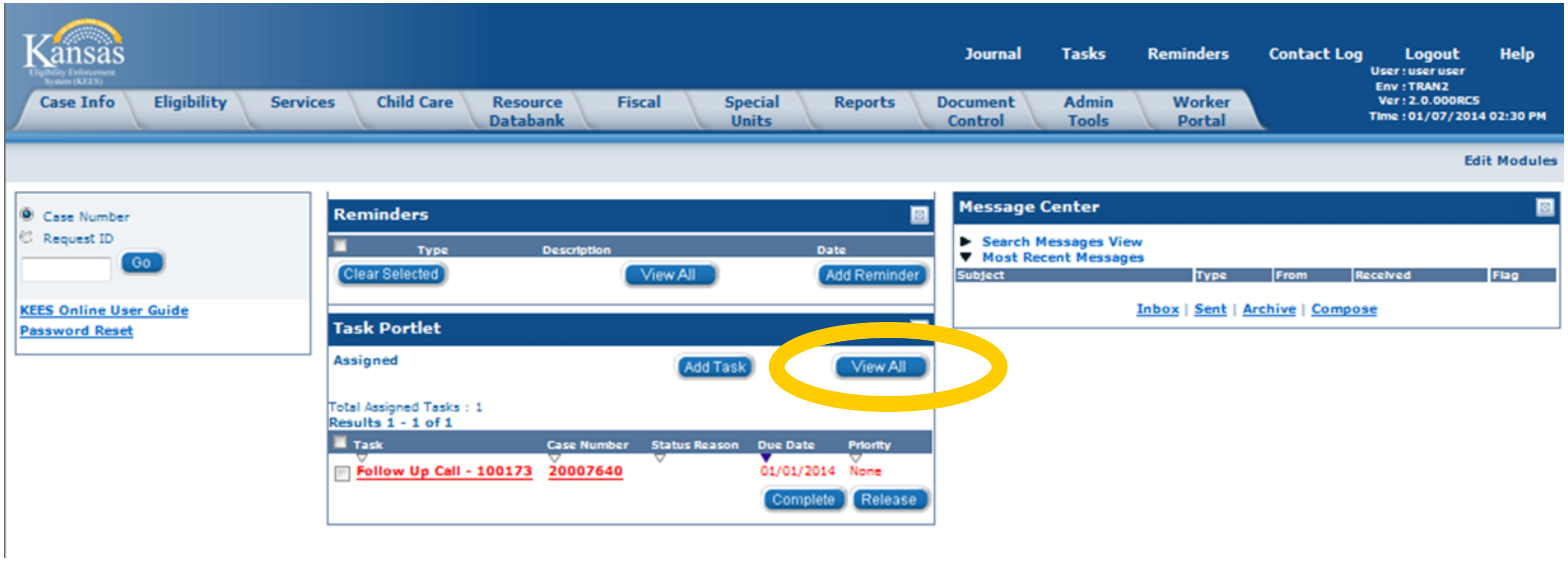
Task Portlet *
Task Inventory Page*
Task Management*

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

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

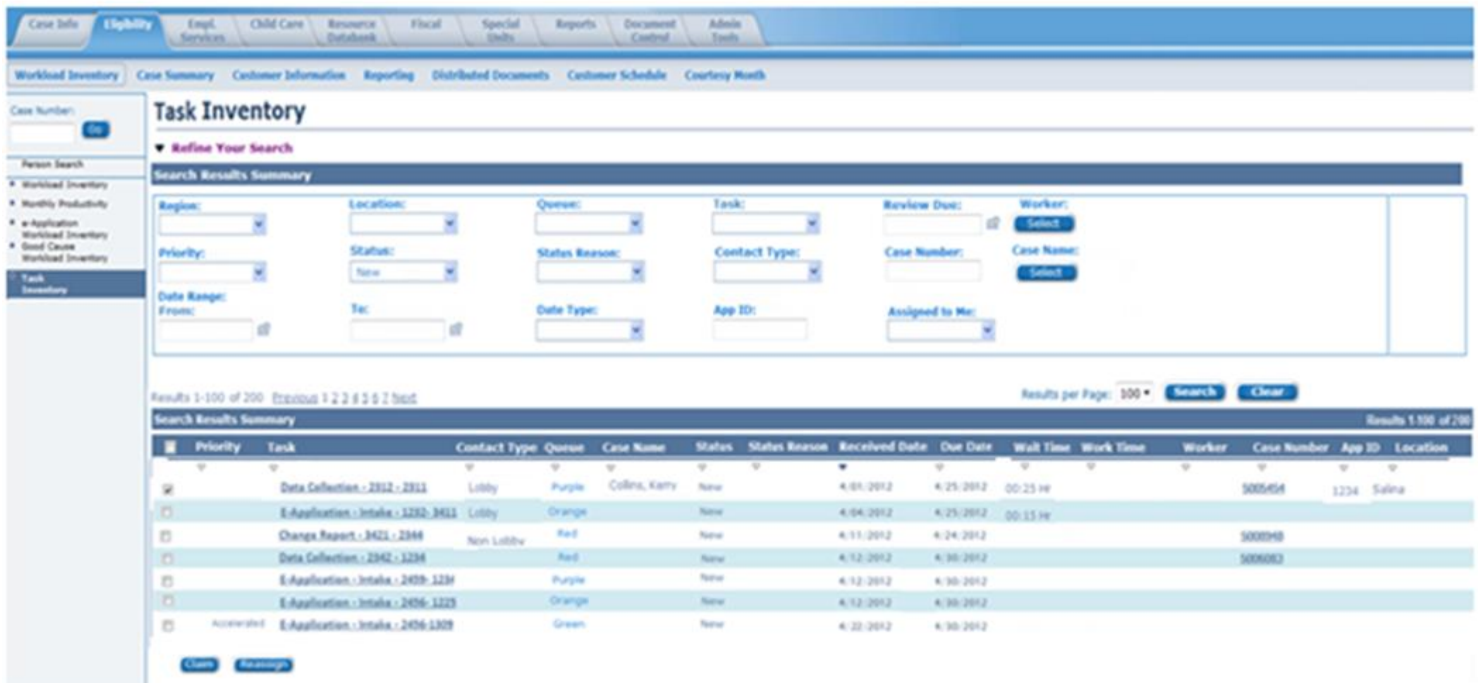
- <u>**Task Inventory Page,**</u> allows you to search for tasks using criteria you enter.
- <u>**The Task Portlet**</u>, is available on your home page and contains a list of the Tasks that are assigned to you.
- <u>**Task Management Window,**</u> allows you to view all tasks related to a specific case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

TASK Inventory

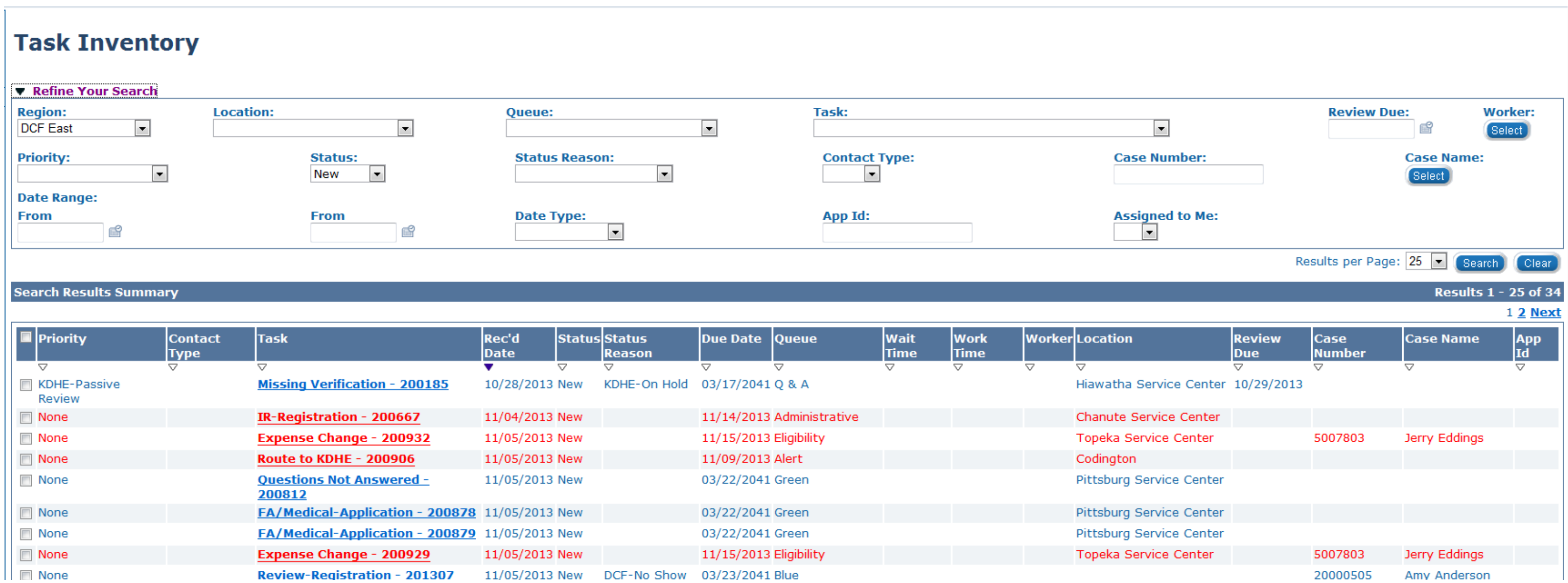


Access the Task Inventory by clicking the View All button from the Task Portlet.
The Task Inventory page will display.

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.



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: Select

Priority: | Status: New | Status Reason: | Contact Type: | Case Number: | Case Name: Select

Date Range: From | From | Date Type: | App Id: | Assigned to Me:

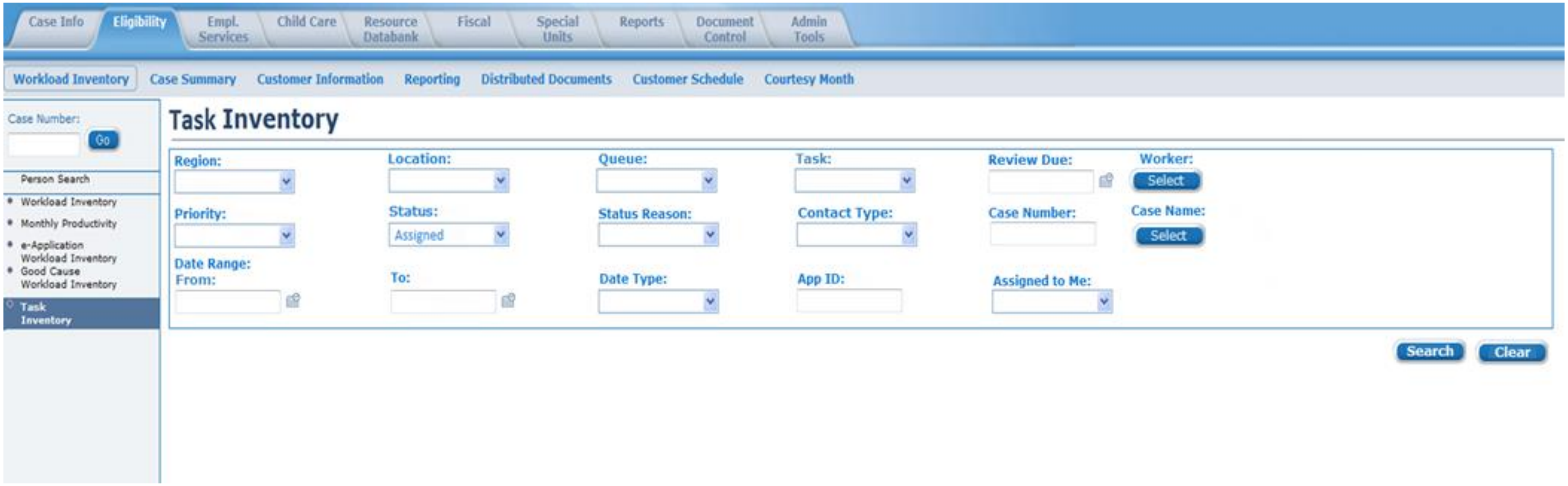
Results per Page: 25 Search Clear

Search Results Summary — Results 1 - 25 of 34

1 2 Next

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
KDHE-Passive Review		Missing Verification - 200185	10/28/2013	New	KDHE-On Hold	03/17/2041	Q & A				Hiawatha Service Center	10/29/2013			
None		IR-Registration - 200667	11/04/2013	New		11/14/2013	Administrative				Chanute Service Center				
None		Expense Change - 200932	11/05/2013	New		11/15/2013	Eligibility				Topeka Service Center		5007803	Jerry Eddings	
None		Route to KDHE - 200906	11/05/2013	New		11/09/2013	Alert				Codington				
None		Questions Not Answered - 200812	11/05/2013	New		03/22/2041	Green				Pittsburg Service Center				
None		FA/Medical-Application - 200878	11/05/2013	New		03/22/2041	Green				Pittsburg Service Center				
None		FA/Medical-Application - 200879	11/05/2013	New		03/22/2041	Green				Pittsburg Service Center				
None		Expense Change - 200929	11/05/2013	New		11/15/2013	Eligibility				Topeka Service Center		5007803	Jerry Eddings	
None		Review-Registration - 201307	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.



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

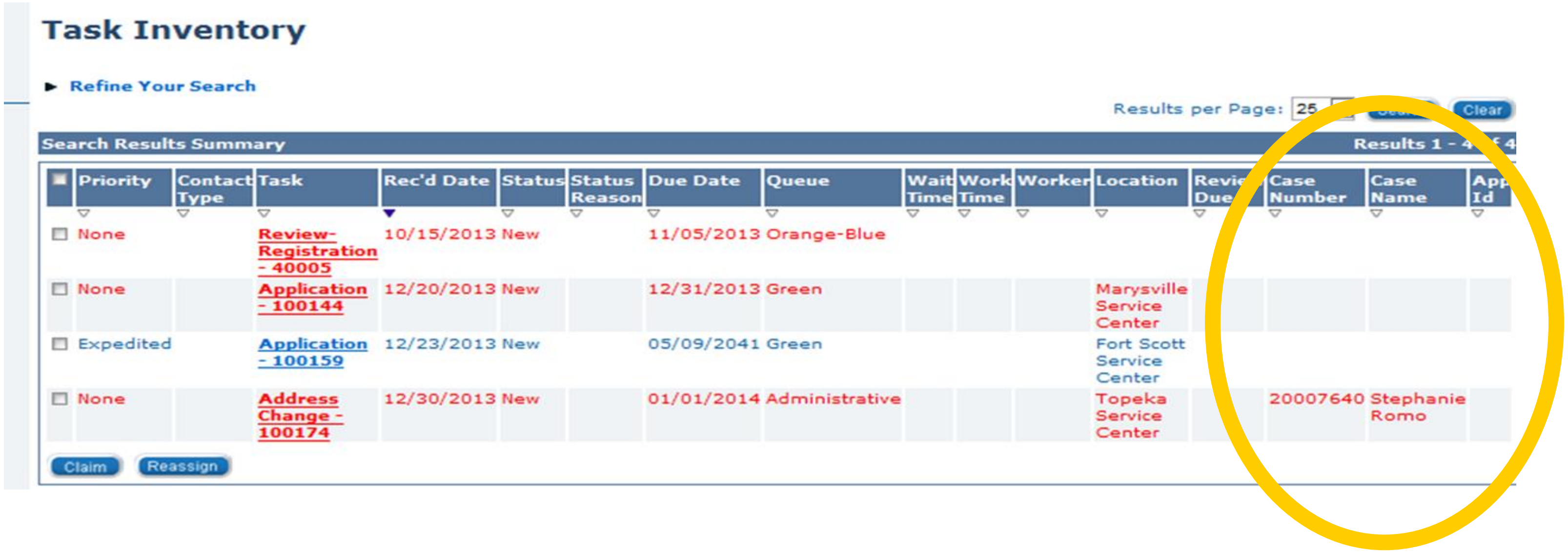
Results per Page: 25 Search

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
☐	None		Review-Registration - 40005	10/15/2013	New		11/05/2013	Orange-Blue								
☐	None		Application - 100144	12/20/2013	New		12/31/2013	Green				Marysville Service Center				
☐	Expedited		Application - 100159	12/23/2013	New		05/09/2041	Green				Fort Scott Service Center				
☐	None		Address Change - 100174	12/30/2013	New		01/01/2014	Administrative				Topeka Service Center		20007640	Stephanie Romo	

Claim Reassign

- 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 Clear

Search Results Summary — Results 1 - 4

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

Claim Reassign

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

You should look at the Task Details prior to Claiming.

Task Inventory

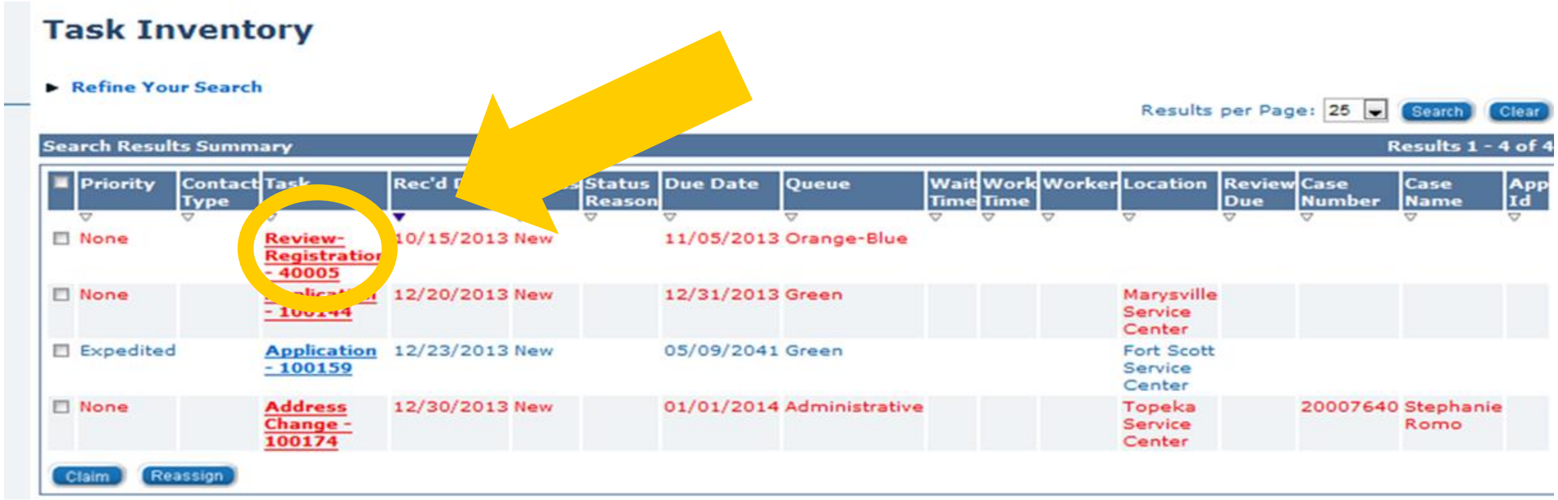
▸ Refine Your Search

Results per Page: 25 Search Clear

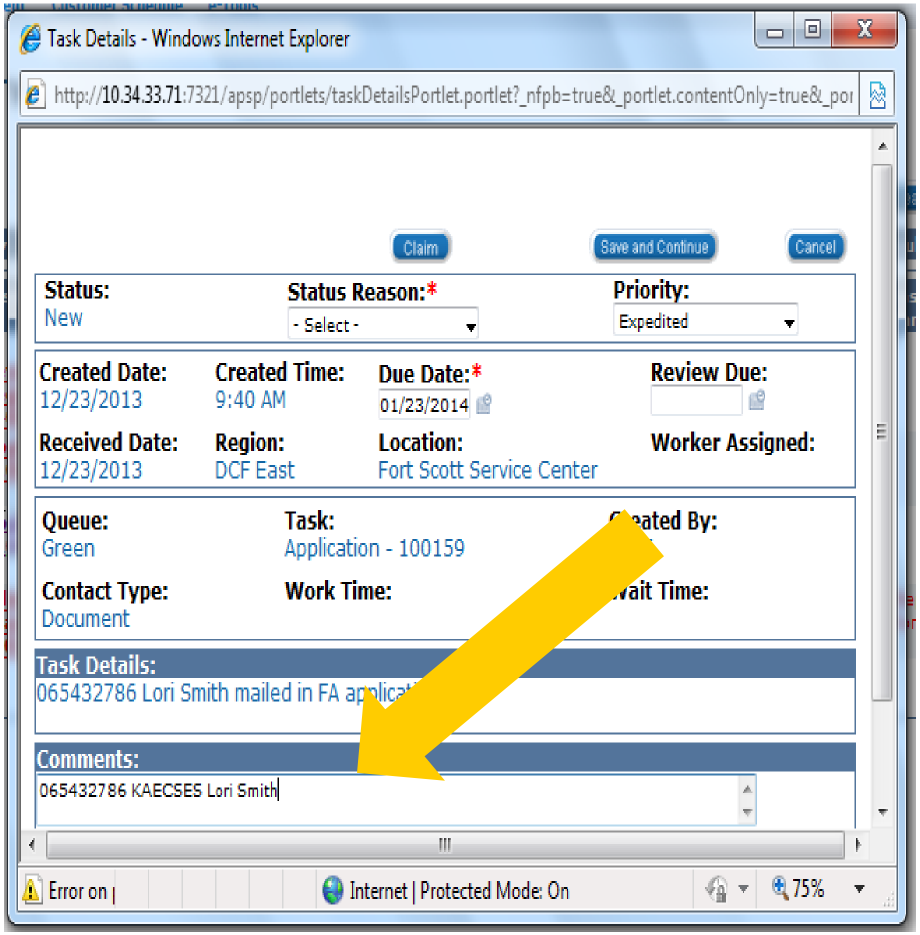
Search Results Summary — Results 1 - 4 of 4

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

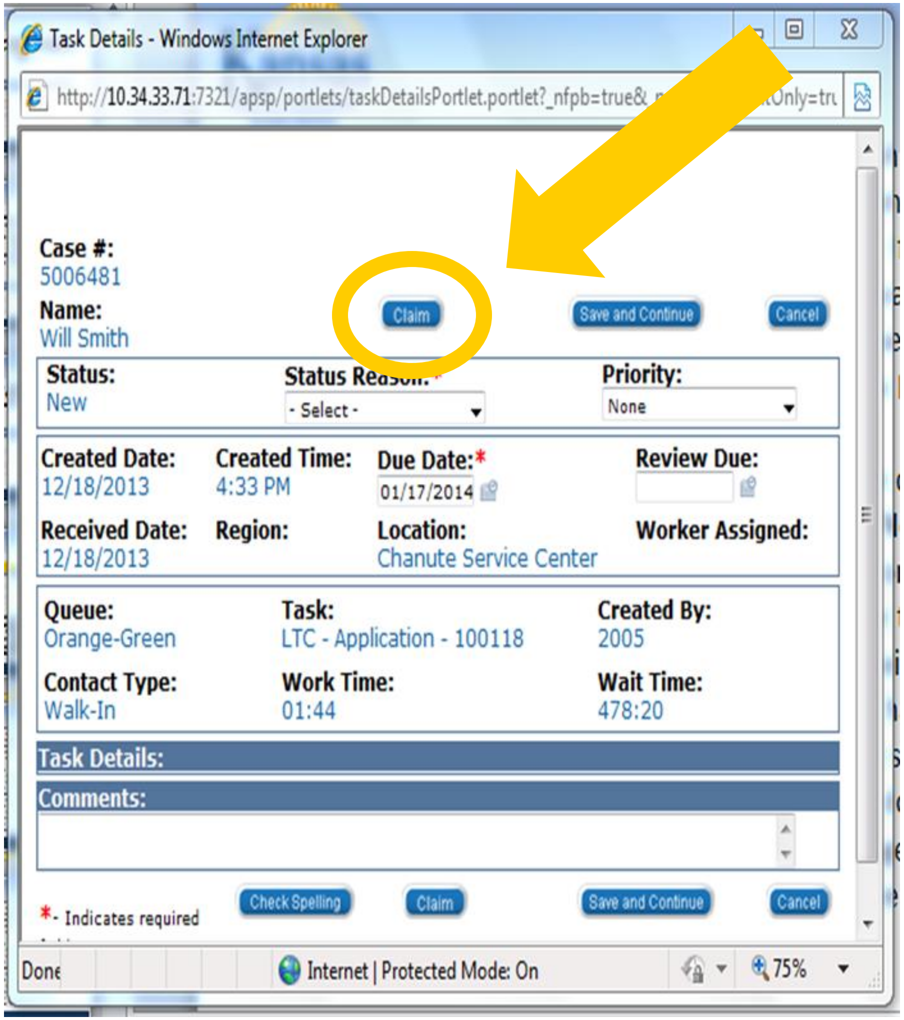
Claim Reassign



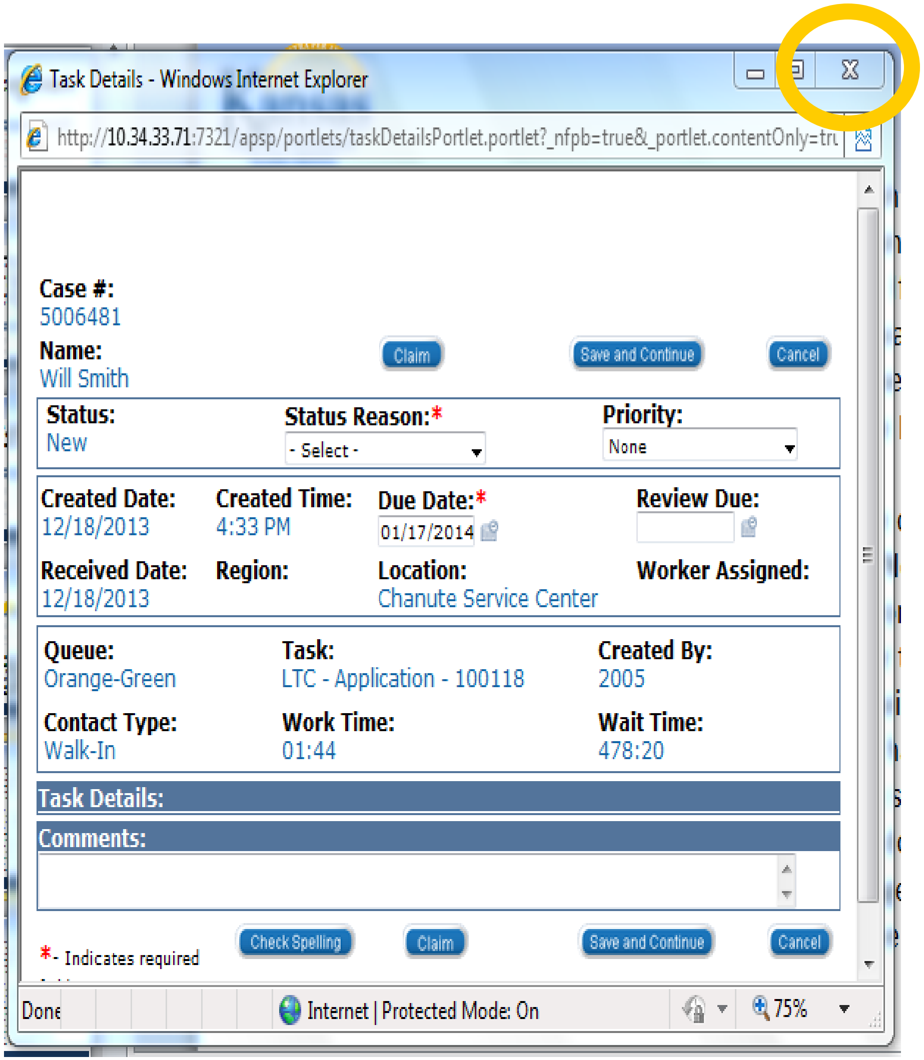
- You will need to click on the Task hyperlink to open the 'Task Details'.
- Clicking on the task name hyperlink will open the task without claiming the task.



- 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.



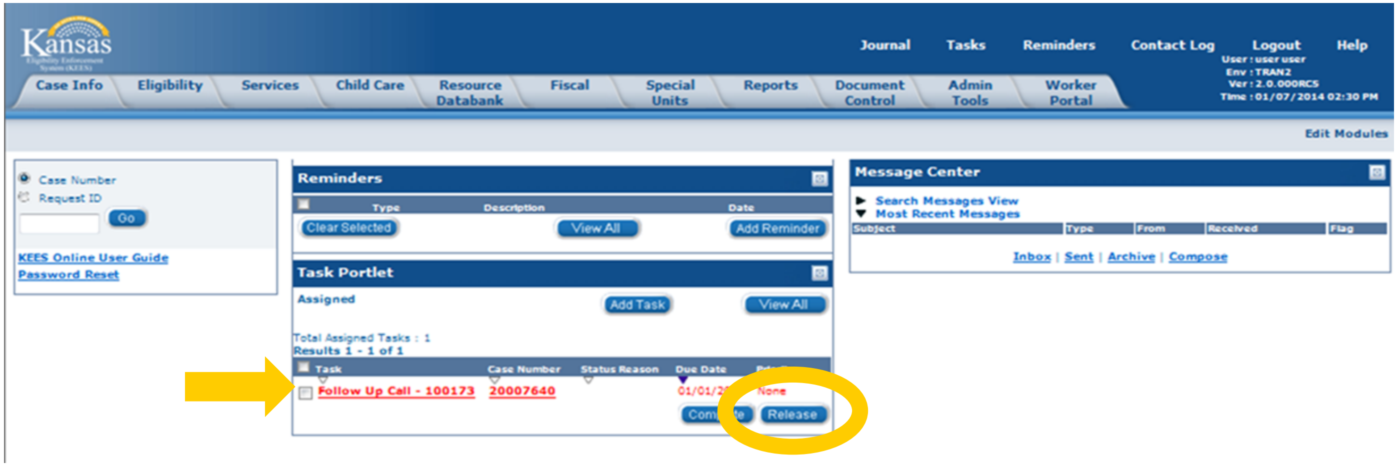
You will need to click on the 'Claim' button if you decide to claim the task.



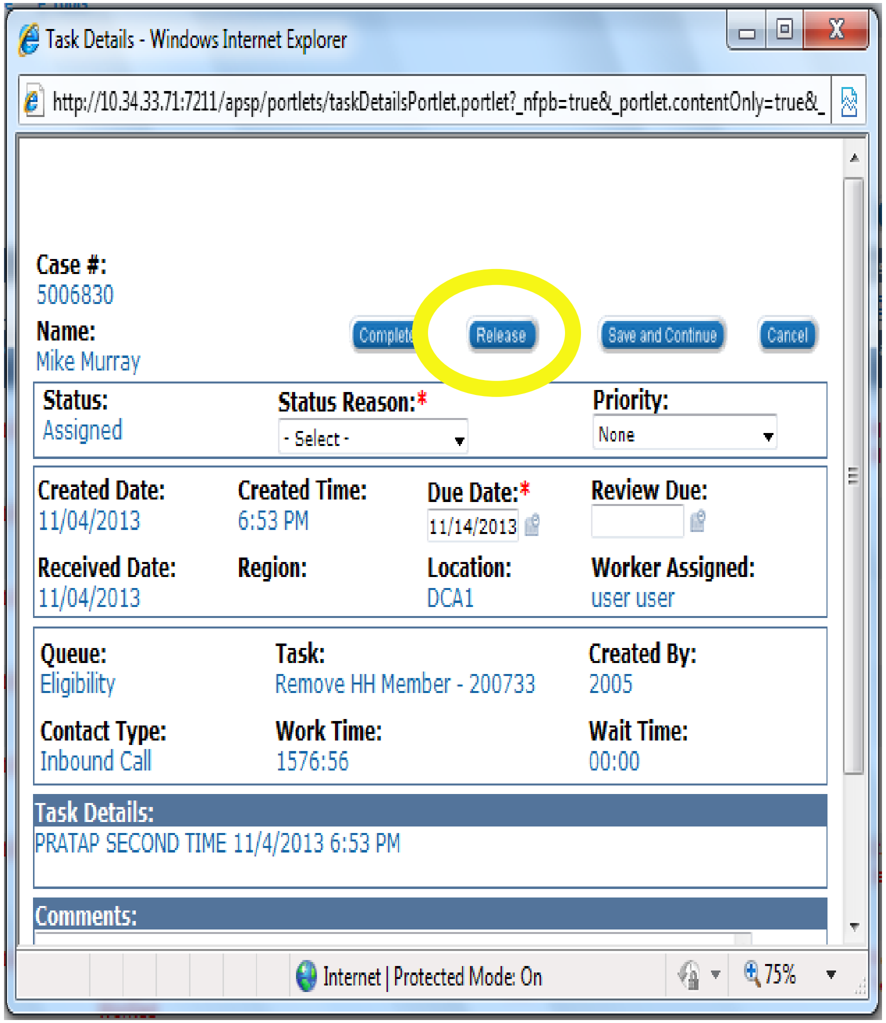
Based on the information on the Task Details window you can consider whether or not you have the training necessary to complete the task.

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.



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



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.

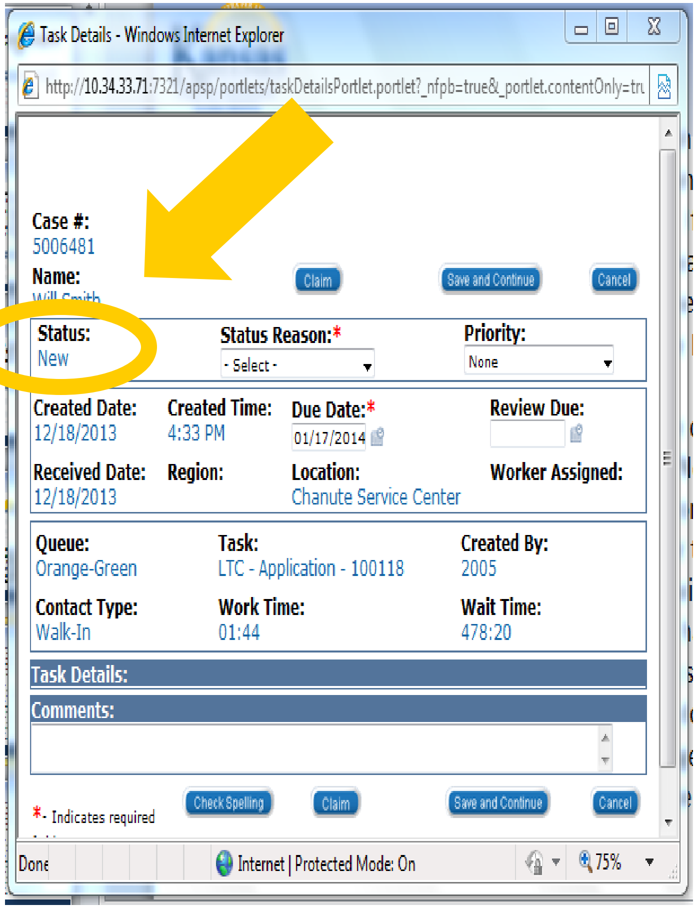
You will have to release each one of them if they should not be assigned to you.

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:

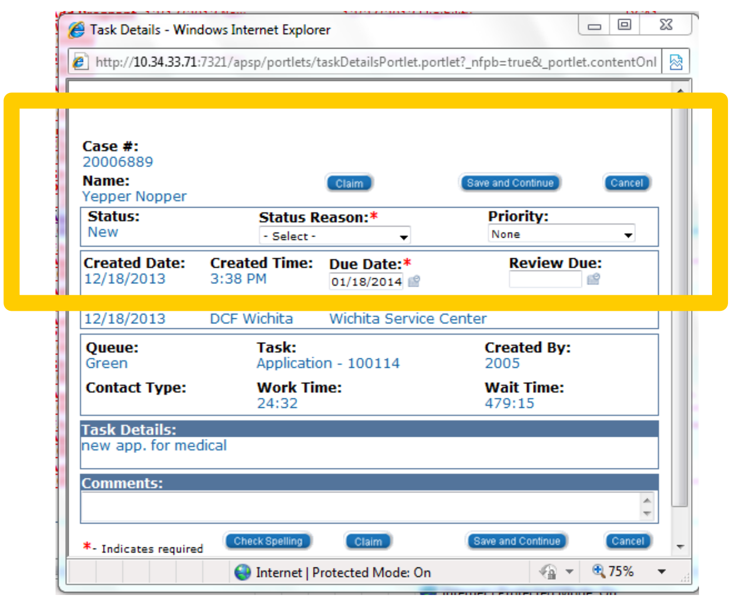
<u>New =</u> Unclaimed Task
<u>Assigned =</u> Claimed Task
<u>Complete =</u> Processed Task
<u>Rejected =</u> Voided Task

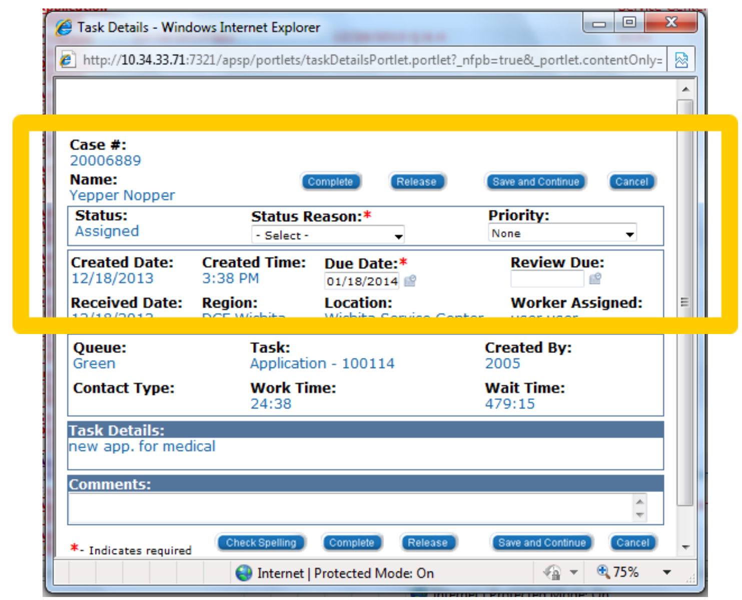
The functions available on the Task Details page depends on the status of the case.

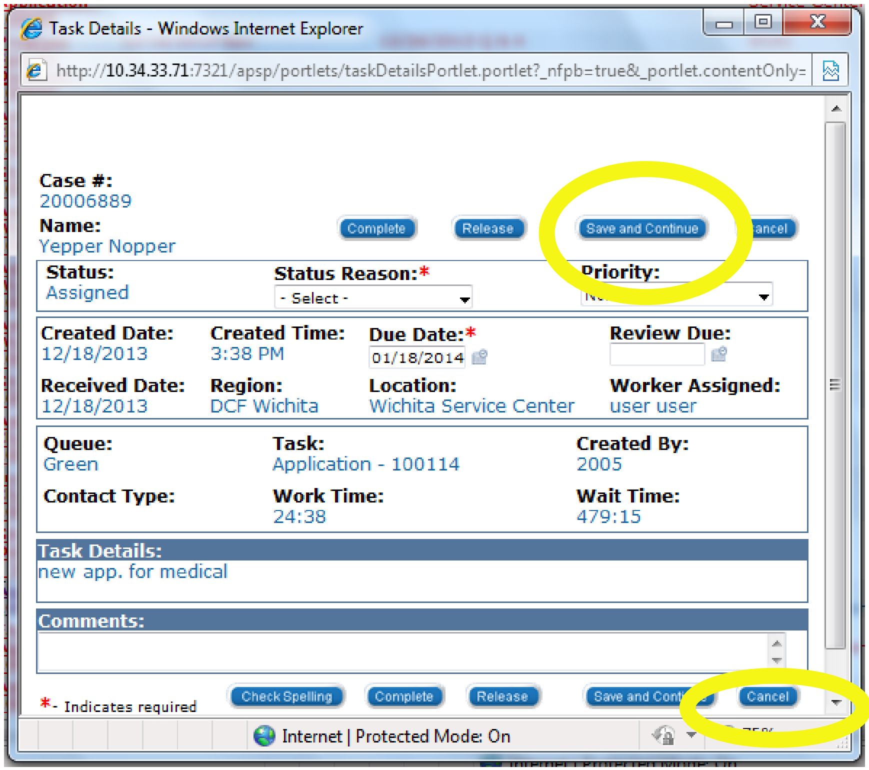


The Status of a task will impact what functionality is available on the Task Detail window.

Status will need to be "New" to claim a Task.





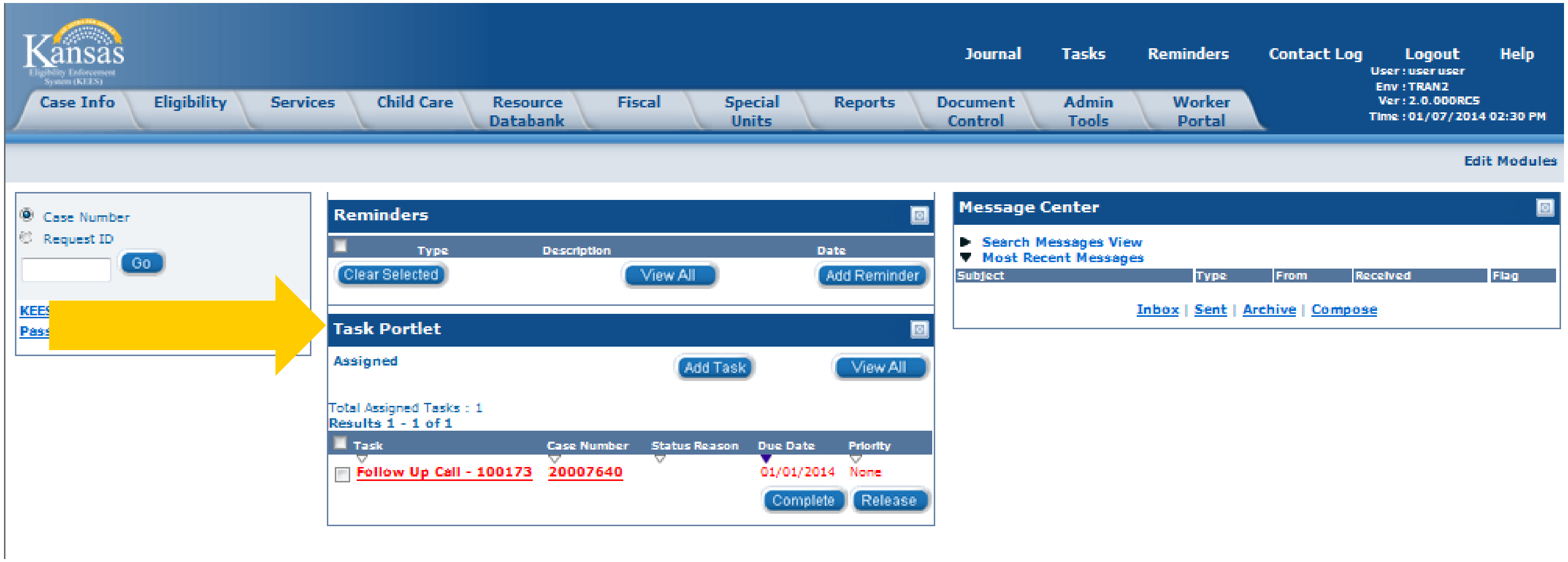


The Save and Continue button will save any changes made to the editable fields and close the window.

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

Demo Task Inventory

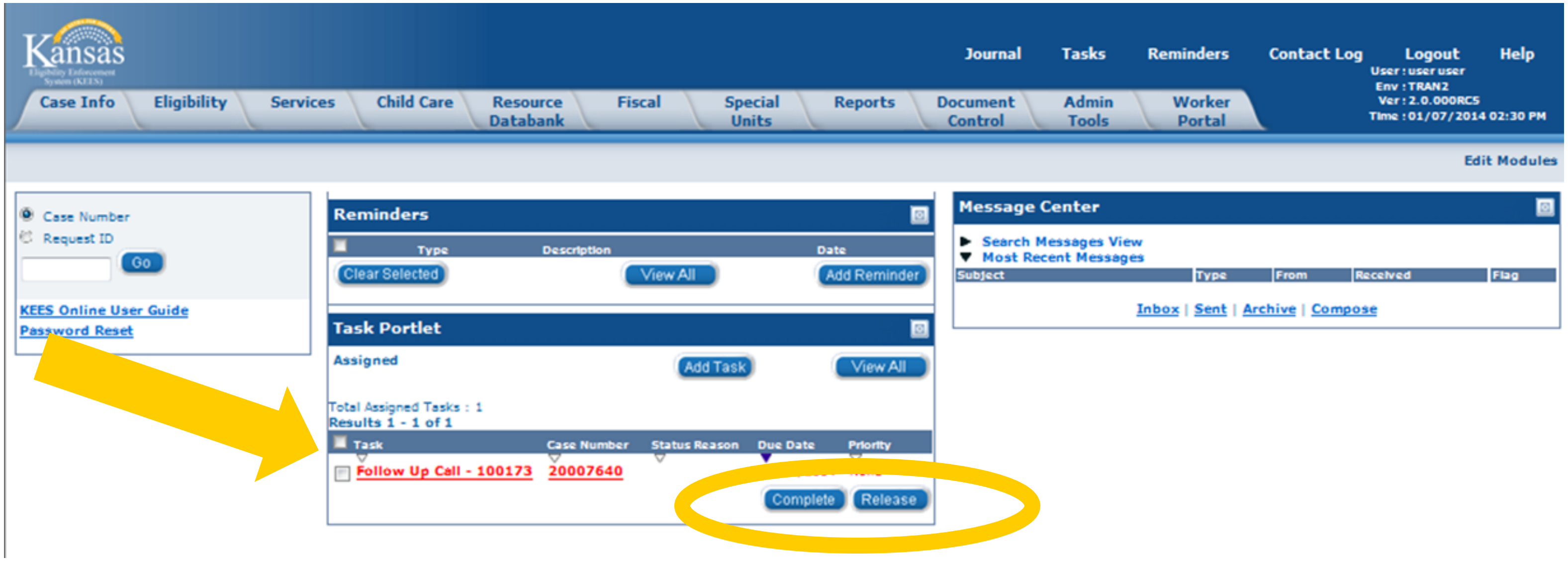
TASK PORTLET



The Task portlet is available on the KEES Home page.

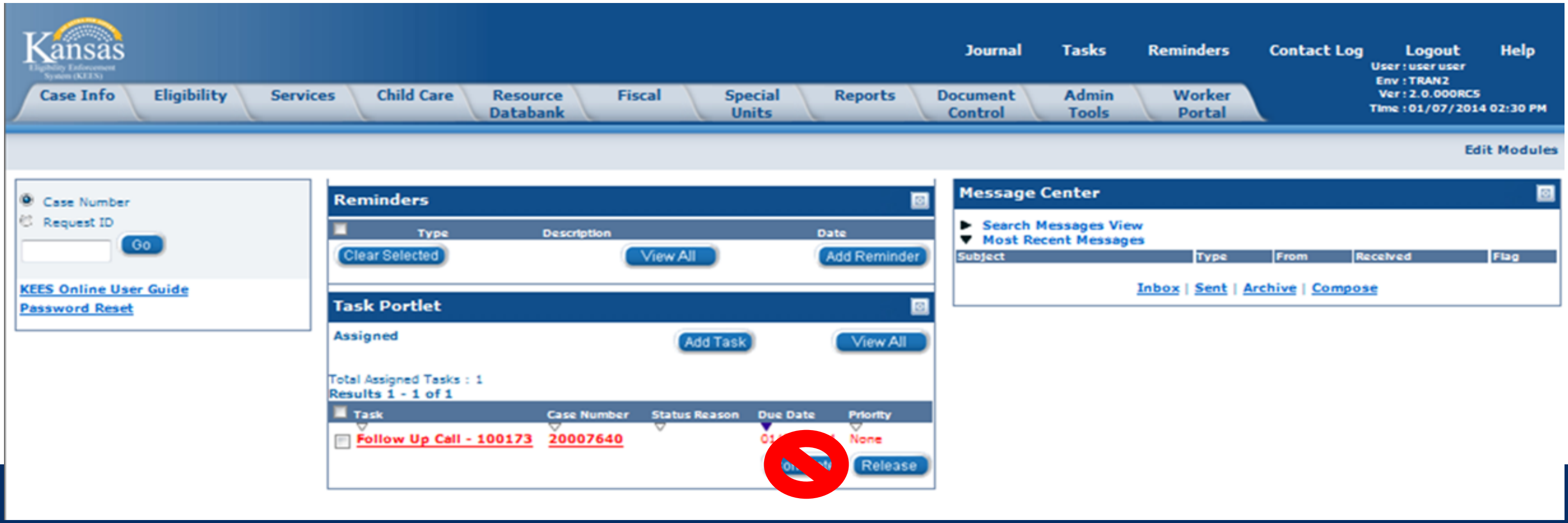
This portlet shows tasks that are currently assigned to you, which, compared to the current tracker, makes catching cases that you claimed but not updated easier to update.

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



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 Task Portlet is a GREAT place to make sure you have not been assigned a task in error.

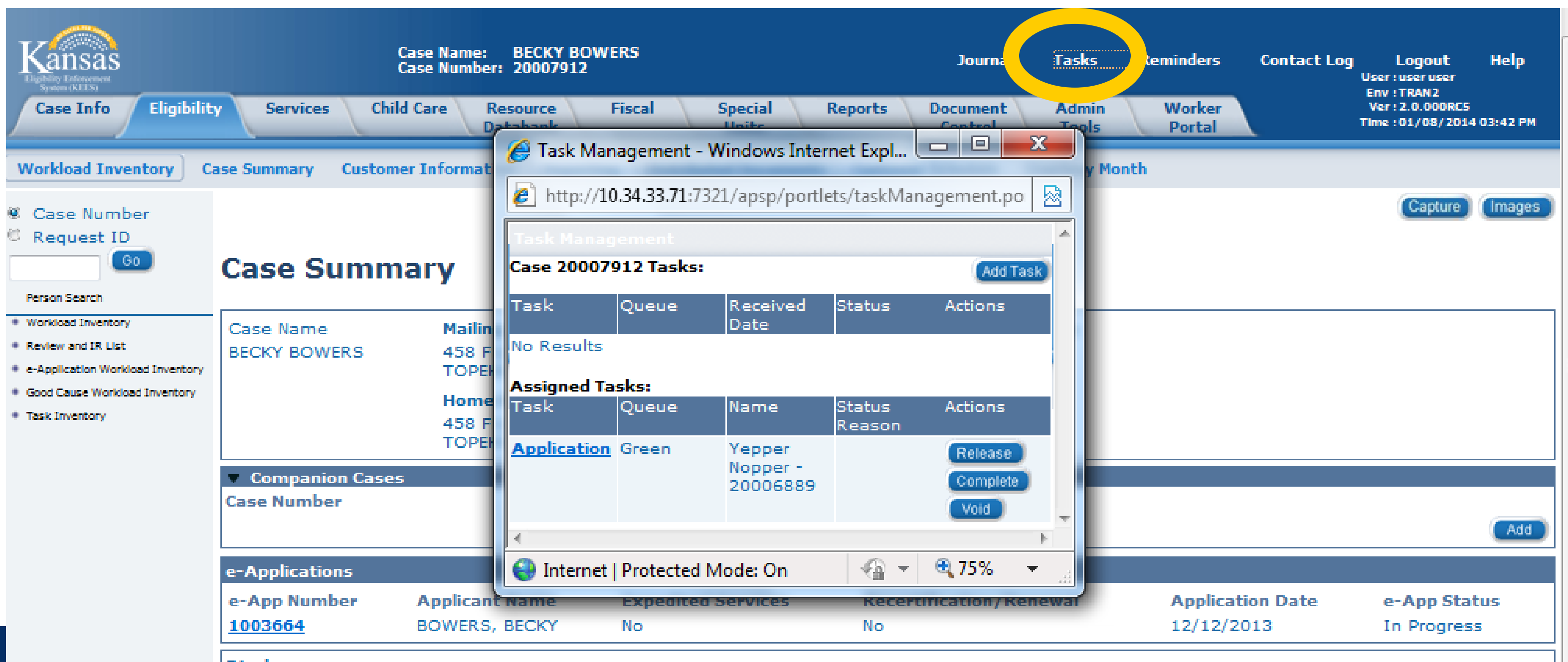
Use this page to review your tasks. You should check your Task Portlet periodically throughout the day and every night before logging out.

TASK PORTLET

View and Claim

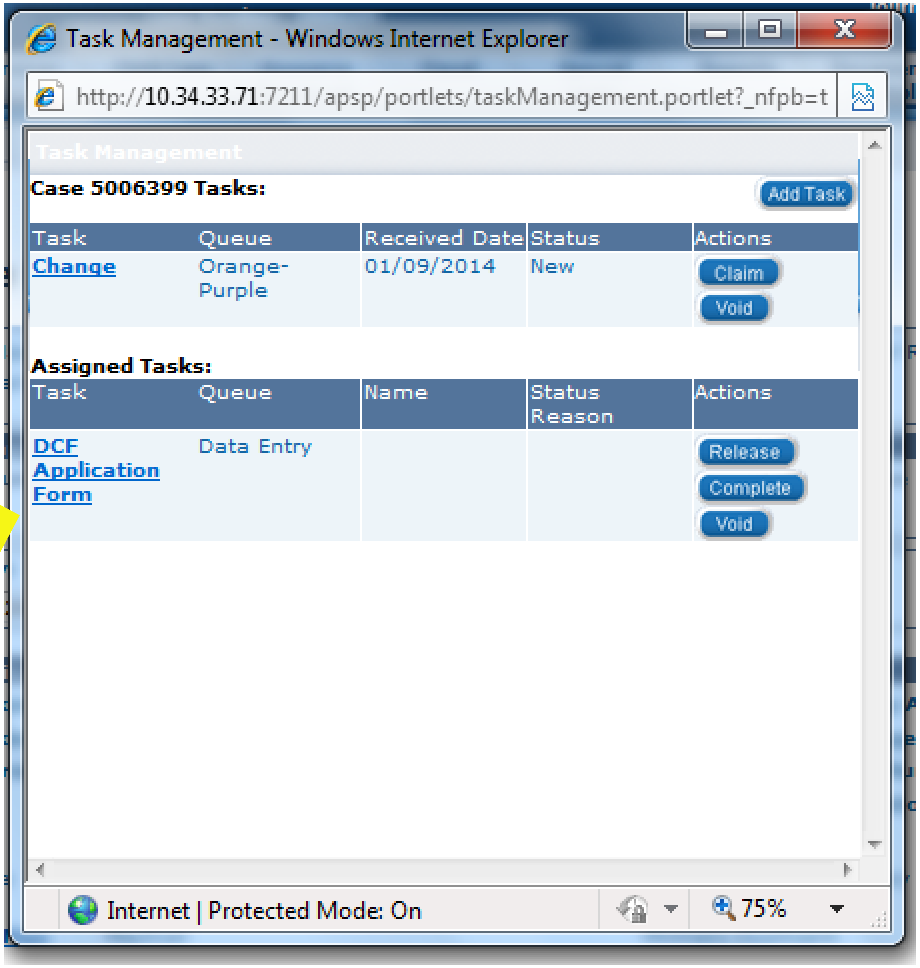
TASK Management

While in the context of a KEES Case, click Task in the Utility Navigation Bar.
The Task Management window will appear.



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.



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

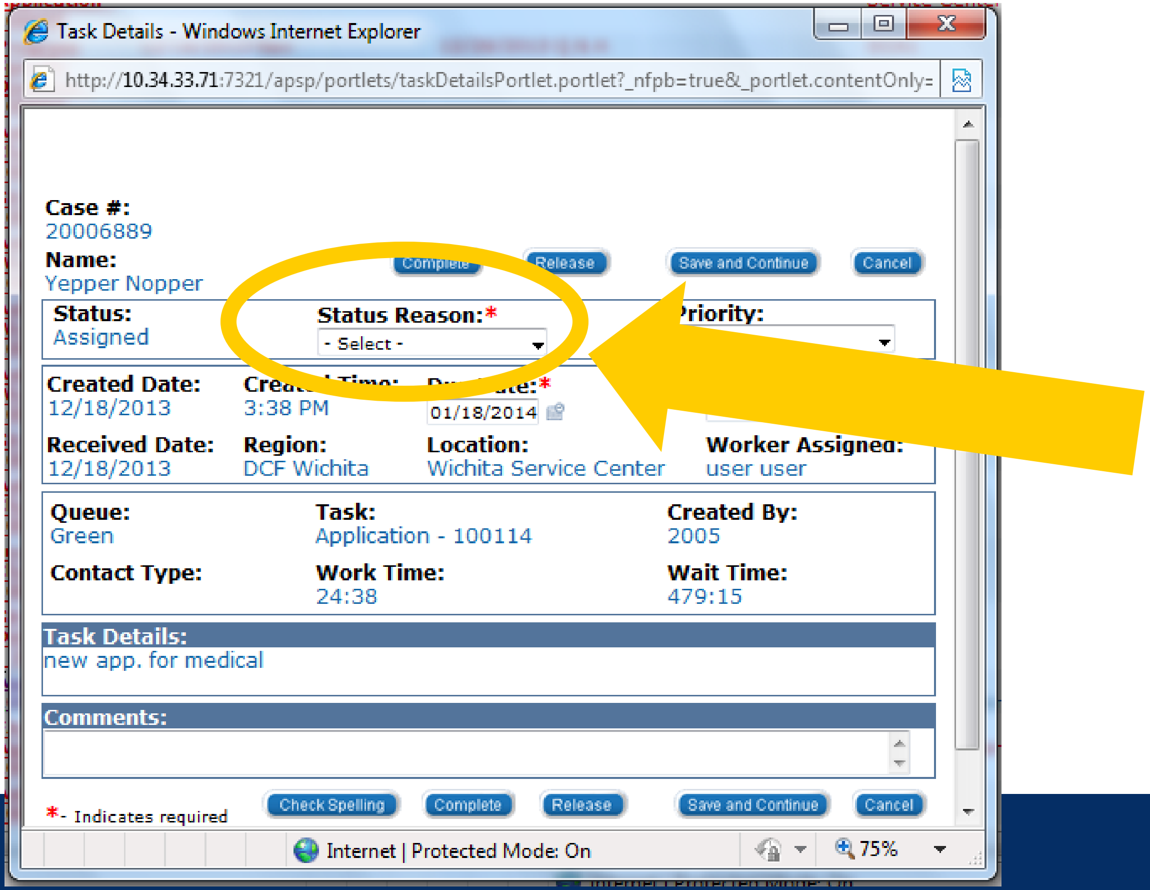
Because Non-Medical tasks will not appear in KEES with a Case Number or Case Name, staff will not be able to search for multiple tasks associated to a Non-Medical case during Phase 2.

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.



Status Reasons:

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

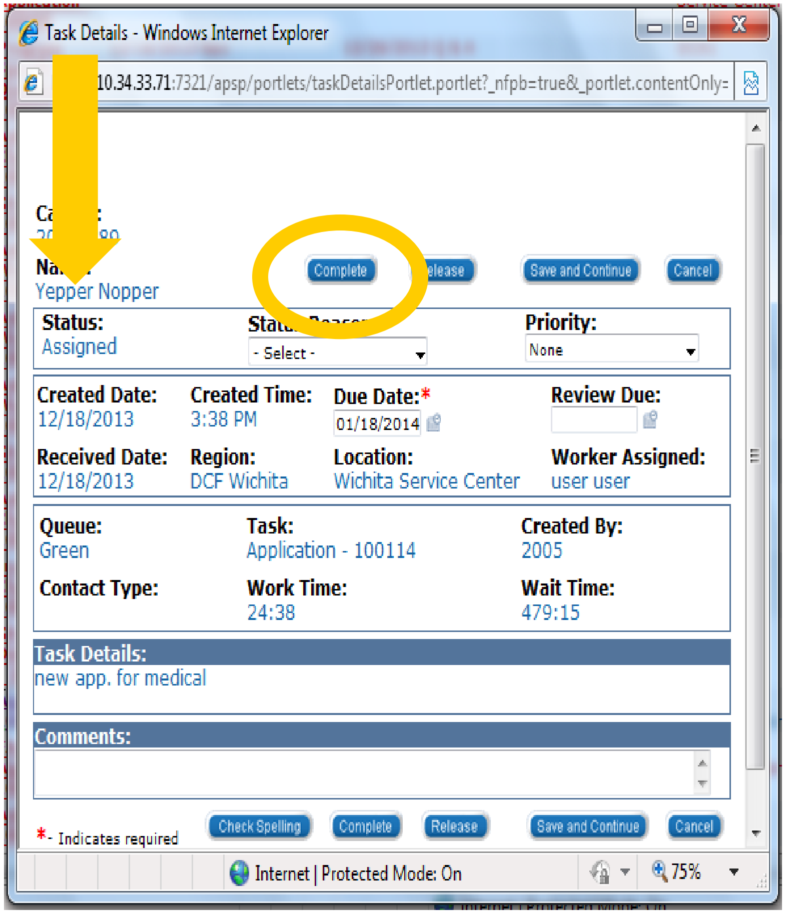
Pending – The task has been worked as far as possible and the clients request has not been resolved.

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.

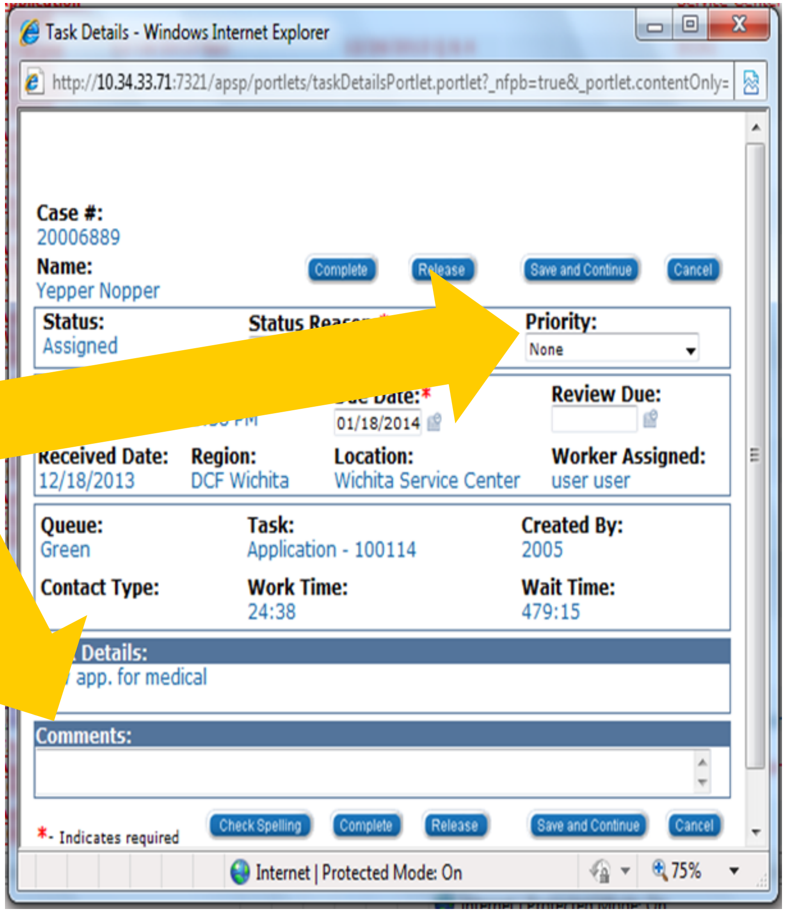
Repeat until all Tasks have been updated with a Status Reason.



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.



GENERAL RULE

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

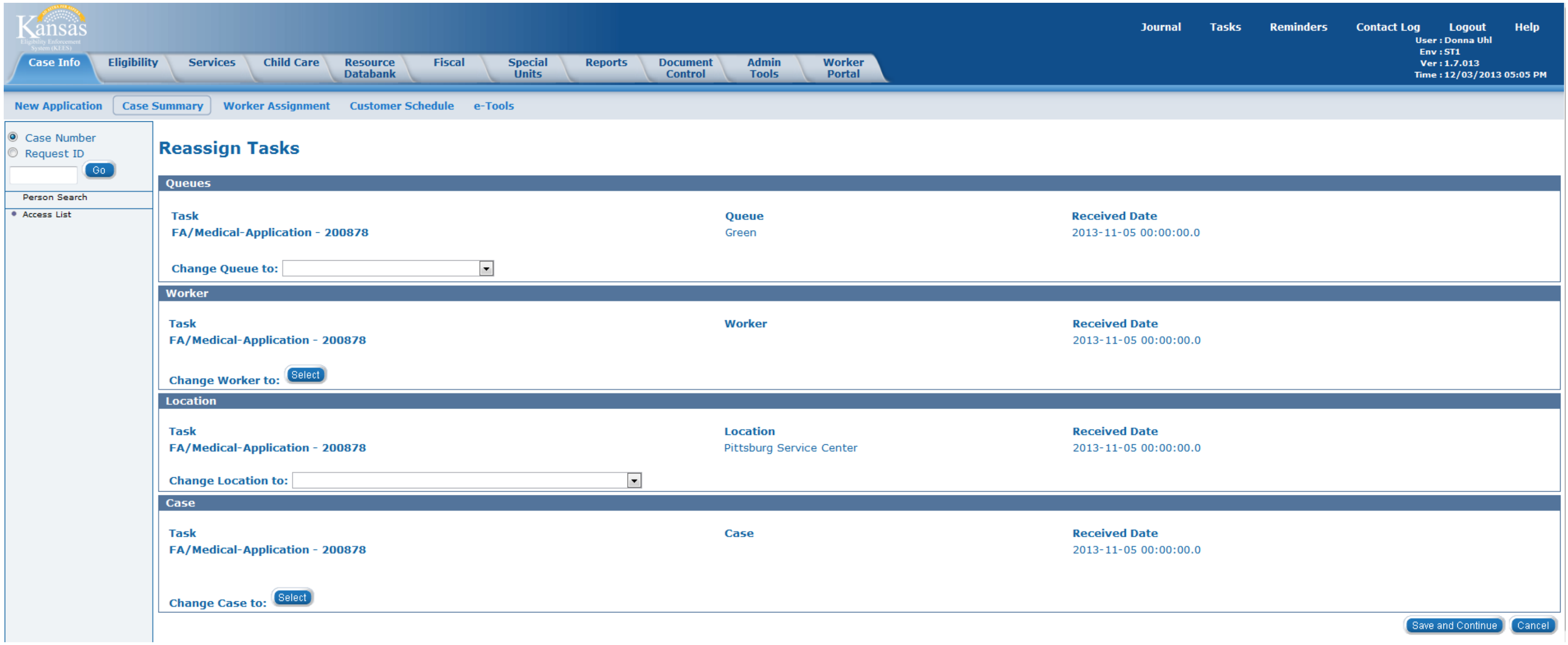
Tasks that have been completed without a status reason will no longer display in the queue and will not be included in reports that provide measurements of work from BPM.

Updating TASK With a 'Status Reason'

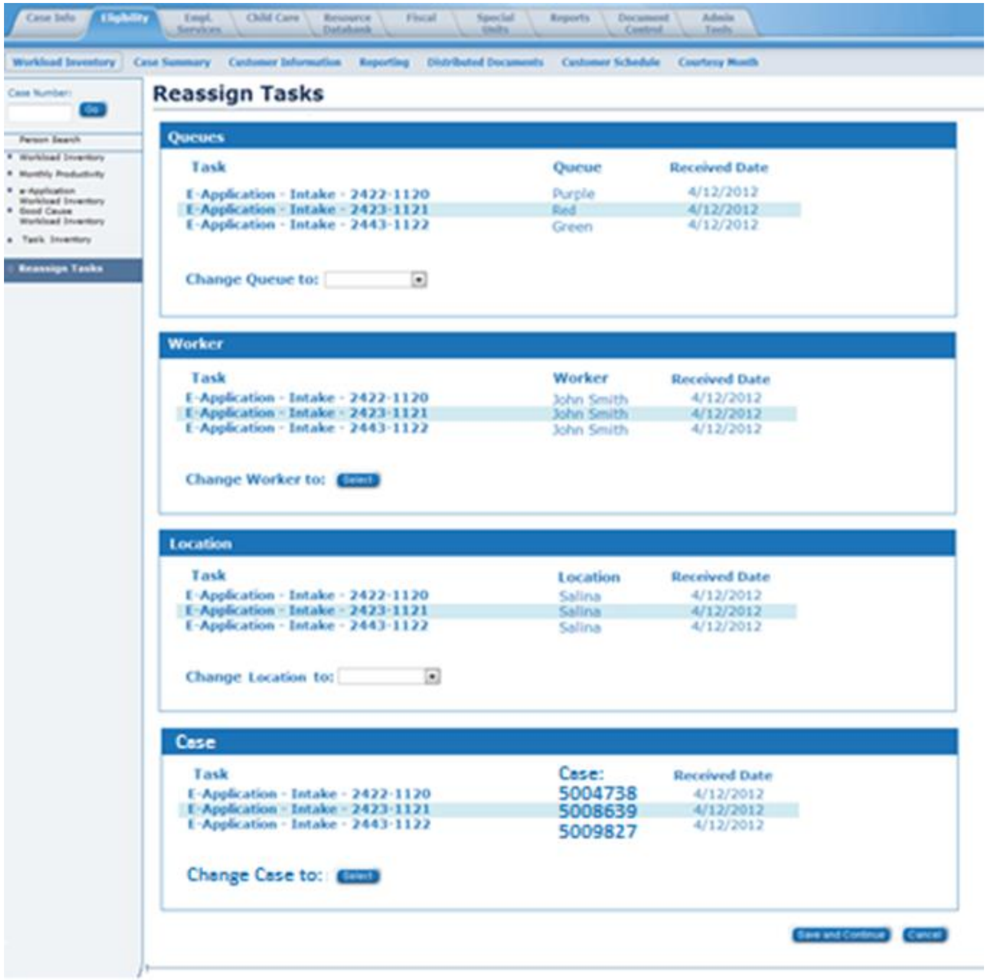
Reassigning and Voiding Task

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.



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



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?