WA 250 MAILROOM IMAGING - DOC TYPES NOT GENERATING TASKS OR GENERATING INCORRECT TASKS

Mailroom staff should check to see if imaging tasks are being auto-generated correctly. If a document is imaged under a **Doc Type** that was designed to automatically generate a task and no task is generated or an incorrect task was generated, then Mailroom staff should manually generate the necessary task and if needed void the incorrect task.

STEP 1 Mailroom staff identify that a task was not automatically generated or an incorrect task was generated after imaging a document under a **Doc Type** that was designed to automatically generate a task.

STEP 2 From within the context of the case, Mailroom staff will need to click the **Tasks** link from the **Utility Navigation** bar to navigate to the **Task Management** pop-up window.

STEP 3 From the **Task Management** page, click the **Add Task** button to navigate to the **Manual Task- In Case** pop-up window.

STEP 4 From the **Manual Task- In Case** pop-up, Mailroom staff will need to complete the following required fields to create the Manual task:

- **Priority:** Select a **Priority** if appropriate.
- **Due Date:** Enter a **Due Date** in MM/DD/YYYY format.
- **Review Date:** Enter a **Review Due** date ub MM/DD/YYYY format if appropriate. (Note: Review due date only needs to be entered when creating tasks for a review. Enter the last day of the review as the review due month.)
- **Received Date:** Enter a **Received Date** in MM/DD/YYYY format. (Note: The Received date should be set using the date the document was received by the agency.)
- **Region:** Using the drop down arrow, select the appropriate **Region**.
- **Location:** Using the drop down arrow, select the appropriate **Location**.
- **Queue:** Using the drop down arrow, select the appropriate **Queue**.
- **Task:** Using the drop down arrow, select the appropriate **Task**.
- **Contact Type:** Leave this field blank.
- **Task Details:** Enter any appropriate information for the next worker in the **Task Details**. Such as a note advising this is a 'Manual Task' and what needs to be done to complete the task

> **NOTE:** Mailroom staff should refer to the Tasks Job Aids that have been developed for information on completing the above required fields.

STEP 5 Click **Save and Continue** to create the Manual task.

STEP 6 Review the **Task Management** page and verify that the task was created.

STEP 7 If an incorrect task was auto-generated then staff should void the incorrect task by clicking the **Void** button in the **Actions** section of the **Task Management** page.

STEP 8 Log all actions in the **Journal.**

Document Change Log

Date	Version	Author	Change Description
03/05/2014	1.0	Jonathan A. Garcia	Initial Draft completed
03/09/2014	1.1	Jonathan A. Garcia	Updated intro with Policy suggested change of adding blurb that states mailroom staff should always check to see imaging tasks are being auto-generated.
03/13/2014	1.1	J. King	Workaround approved
12/04/2014	2.6	Jonathan A. Garcia	Ready for 2.6 Go-Live
12/17/2014	2.6.1	Jonathan A. Garcia	Updated the WA to account for when an incorrect Task is auto-generated
06/06/2015	2.7	Danny Gibbons	Ready for Go-Live

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