Task Guidance for DCF Transition of Medical Cases

09-21-16

KDHE Policy Memo 2016-09-02

Creating a New Task

DCF staff need to ensure a task is available for KDHE. In the instance where there is no task DCF will need to create a task for KDHE. The 'Process Application-Manual' task should be generated for this purpose and assigned to RICE, WILLIAM (worker ID – KH0206Q201). Please see below for instructions on how to create the manual task. Please complete the manual task in following order:

NOTE: You must be within the context of the case in which the task is being created.

1. From within the context of the case click **Task** in Utility Navigation.
2. The **Task Management** page will pop-up, click the **Add Task** button.
3. The **Manual Task- In Case** page displays. Please complete the Manual Task in the following order:
    a. **Worker Assigned:** Click **Select** Button.
        i. From the **Select Worker** page enter worker ID- KH0206Q201 in the **Worker ID** field and click **Search**.
        ii. On the **Select Worker Search Results** page RICE, WILLIAM will display. Click **Select** button. The **Manual Task- In Case** page will re-display.
    b. **Received Date:** Enter Today's date.
    c. **Due Date:** 10 days from the Received Date.
    d. **Region:** KDHE Clearinghouse.

   e. **Location:** KanCare Clearinghouse.
   f. **Queue:** The Program Block Ghost Worker ID will determine the Queue.
      i. If KH0206Q100, select **Eligibility** queue.
      ii. If KH0206Q101, select **LTC Eligibility** queue.
      iii. If KH0206Q102, select **E&D Eligibility** queue.
      iv. If KH0206Q103, select **E&D Eligibility** queue.
   g. **Task:** Process Application- Manual.
   h. Click the **Save and Continue** button to generate the task.
4. End process.

Releasing and Reassigning a Task

Staff need to be aware that other tasks might exist for a case that they processed that may not be assigned to them. As part of the steps to release and reassign their assigned tasks staff should only be reassigning the tasks that they released.

In order to manage this process staff shall take a screenshot of their **Task Inventory** page that displays all of their assigned tasks. This will enable staff the ability to search for the assigned task after they have release them. Staff should complete the search by case number. More details have been provided in the steps below.

1. From the KEES home page, click the **View All** button in the **Task Portlet**. The **Task Inventory** page displays.
2. Apply filters to view tasks only **assigned** to the user.
    a. **Status: Assigned**
    b. **Assigned to me: Yes**
3. Click the **Search** button. The search results will display a listing of all the worker's assigned tasks.
4. Take a screenshot of the **Task Inventory** page that displays the list of assigned tasks. ***Note:*** *If multiple pages exist, a separate screenshot should be taken of each page*.
5. Select the check box for the task(s) the user wants to release.
6. Click the **Release** button located at the bottom of the page. The **Task Inventory** page re-displays and the task(s) no longer displays in the worker's assigned Task List. ***Note:*** *If multiple pages exist, this will need to be done for each page*.
7. Click on **Refine Your Search** to re-enter search criteria to search for the task to reassign it to the designated new **Worker ID**. Search for the tasks by case number using the screenshot of the **Task Inventory** page.
8. Apply the following filters to view the tasks assigned to the case.

   a. **Status: Change from Assigned to New**
   b. **Case Number: Enter the case number**
   c. **Assigned to me: Change from Yes to Blank**

9. Click the **Search** button.
10. Select the check box for the task(s) the user wants to reassign.
11. Click the **Reassign** button located at the bottom of the page. The **Reassign Tasks** page displays with the selected tasks listed in the following sections:
    a. **Queues:** Allows the user to change the queue listed on the task.
    b. **Worker:** Allows the user to change the assigned worker ID listed on the task. *Note: The **Worker** field should be blank.*
    c. **Location:** Allows the user to change the location listed on the task.
    d. **Case:** Allows the user to change the assigned case listed on the task.
12. In the **Worker** section, click on/highlight the name of the task. ***Note:*** *Only one task can be selected at a time.*
13. To reassign the task to a the new worker Id, click the **Select** button next to **Change worker to:**
14. The **Select Worker** page displays. Enter the following **Worker ID** KH0206Q201 and then click the **Search** button.
15. The **Select Worker** Search Results Summary page displays with the **Worker Name** of 'Rice, William'. Click the **Select Button**.
16. The **Reassign Tasks** page re-displays showing the new assigned worker is 'William H Rice'.
17. If multiple task are being re-assigned, select the next task and complete steps 12-16. Once all tasks have been reassigned move to **step 18.**
18. Click the **Save and Continue** button to update the task and return to the **Task Inventory** page.
19. If they are more additional tasks that need to be reassigned for different case numbers, return to **step 7** and begin process for new case number. If they are no more tasks then the worker is done.