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**State of Wisconsin
Governor Scott Walker**

**TO: Income Maintenance Supervisors
Income Maintenance Lead Workers
Income Maintenance Staff
W-2 Agencies
Workforce Development Boards
Job Center Leads and Managers
Training Staff
Child Care Coordinators**

**FROM: Shawn Smith, Director
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SUBJECT: Workload Dashboard

CROSS REFERENCE: Process Help Chapter 53

EFFECTIVE DATE: August 27, 2012

PURPOSE:

The purpose of this Memo is to announce the implementation of the new Workload Dashboard on August 27, 2012. The Workload Dashboard is designed to support the tracking and reporting of caseload management functions and to support the new Income Maintenance (IM) Administrative Structure and W-2 Agencies.

BACKGROUND:

Until the implementation of the IM Consortia Administration structure, IM caseloads were administered by the local county agency with cases assigned to individual workers. Workers tracked their workload and supervisors monitored workload and timeliness through the CWW Home Page, CWW alerts, EOS reports and ACD reports. With the change in administration structure, workers and supervisors required a new way to track and monitor the workload.

BEPS/DFS OPERATIONS MEMO					
No:		12-41			
DATE:		08/20/12			
FS	<input checked="" type="checkbox"/>	MA	<input checked="" type="checkbox"/>	BC+	<input checked="" type="checkbox"/>
SC	<input type="checkbox"/>	CTS	<input checked="" type="checkbox"/>	FSET	<input type="checkbox"/>
BC+ Basic	<input type="checkbox"/>	BC+ CORE	<input checked="" type="checkbox"/>		
CC	<input checked="" type="checkbox"/>	W-2	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>
CF	<input type="checkbox"/>	JAL	<input type="checkbox"/>	JC	<input type="checkbox"/>
RAP	<input type="checkbox"/>	WIA	<input type="checkbox"/>	Other	<input type="checkbox"/> *
EP					

The Workload Dashboard will allow all workers and supervisors to monitor timely case processing, efficiency and accuracy, predict upcoming workload and support increased caseloads and team structures. The Workload Dashboard will provide a single summarized view of outstanding work that IM workers and FEP's are responsible for in order to help them prioritize and complete their work. In addition, the tool will consistently measure performance of workers, teams, counties/tribes, consortia, W-2 agencies and the state as a whole. Data from the Workload Dashboard will be utilized to develop future managerial reports.

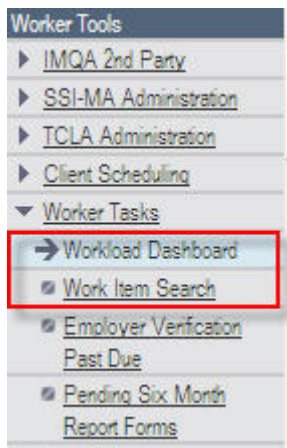
This Memo will provide a high level overview of the Workload Management tools and new CWW pages. More detailed information will be provided in Process Help Chapter 53 and through training materials prior to implementation.

W-2: While this tool is available as described, DCF will issue further guidance to the W-2 Agencies on system changes related to the 2013, W-2 and related programs contract changes.

CARES:

There will be a pilot conducted with the East Central IM Partnership and Northern Consortia of the Workload Dashboard from 08/27/2012 - 09/30/2012. The dashboard will only be available to the agencies in the pilot consortia through 9/30/2012. It is anticipated that the Workload Dashboard will be available statewide on 10/01/2012. During the pilot period, even though the dashboard will not be available to agencies outside the pilot consortia, the Workload Dashboard data will be populating for all consortia, county/tribes and W-2 agencies so the information on the dashboard will be available back to 8/27 for all agencies once the tool is available statewide.

Workers will access the Workload Dashboard using the Navigation Menu in CARES Worker Web (CWW) under 'Worker Tools.'



The following pages will be added to CWW:

- Workload Dashboard
- Work Item Search
- Work Item Details (Cannot navigate to this page from the Menu)
- Work Item Reassignment (Cannot navigate to this page from the Menu)

WORKLOAD DASHBOARD PAGE:

Workload Dashboard



Work Item Dashboard for RAQUEL BERKSHIRE - XCTH70						
Work Items	Days Left to Complete					
Category	Total	<1	1-7	8-14	15-30	>30
Applications	0					
SMRFs	0					



Work Item Dashboard for ANUSUYA GOWDA - XCTN08						
Work Items	Days Left to Complete					
Category	Total	<1	1-7	8-14	15-30	>30
<input type="checkbox"/> Applications	44	36		2	6	
<input type="checkbox"/> Unassigned	8	4	2		2	
FoodShare Priority Service	3	3				
EBD Medicaid	1		1			
Family Planning Waiver	1		1			
Health Care	2	1			1	
Child Care	1				1	
<input type="checkbox"/> Assigned Application	7	6	1			
RFA Processing	12	9	1	2		
Case Processing	57	30	1	8	18	
Pending Verification	1	1				
<input type="checkbox"/> SMRFs	3	2	1			



When the worker clicks on the Workload Dashboard link from the Navigation Menu, the worker's dashboard will display. At implementation, the Workload Dashboard will track work items created for Applications and SMRFs. The first column of the dashboard lists the Work Item Categories. By clicking the '+' sign next to Applications or SMRFs, Work Item types will be displayed. Work items for Applications, RFAs and SMRFs will be tracked from when they are received or created through when the case is confirmed.

The Days Left to Complete section will assist workers to prioritize their work and help determine which work items should be processed first. For example, an item in the '<1' column is either due today or is overdue. These work items should be analyzed for priority processing prior to items within the '1-7' column. Work item statuses will be updated real time as the application, RFA or SMRF is being processed. The counts listed on the dashboard will be updated real time for individual worker dashboards and team dashboards as the application, RFA or SMRF is being processed. To view the updates, click the 'Refresh' button at the top of the page. Counts for the County/Tribe, IM Consortium and State dashboards are updated through a nightly batch process.

A worker with security level 25 can open any other worker's dashboard within their IM Consortium and can also open a team dashboard for any teams in which they are a member. Supervisors (or workers with a CARES security level of 50 or higher) may open any dashboard across the state.

To open a dashboard belonging to another Worker, Team, County/Tribe, IM Consortium or State (if appropriate) click on the Open a Dashboard button, select the type and click Go.

➤**Note:** Only the dashboards that a worker can open based on their CARES security level will appear as options.

Example: Worker with security level 25:

Open a Dashboard

Step 1: Select the type of Dashboard you want to add Cancel

Worker

Team

Go

Example: Worker with a security level 50 or above:

Open a Dashboard

Step 1: Select the type of Dashboard you want to add Cancel

Worker

Team

County

IM Consortium

State

Go

WORK ITEM SEARCH PAGE:

Work Item Search
Reset

▼ Criteria

How would you like to search?

By IM Consortium, County or Team

By Work Item Owner

By Primary Worker or Caseload

By Case, RFA or ACCESS Tracking Number

By Consortium, County or Team

County / Tribe:

IM Consortium:

Additional Search Criteria

Category:

Due Date: Any

Before

Between and

Completion Status:

Completed / Withdrawn Between: and

Has related documents? (Only applies to cases):

What would you like to do?

View and Select Work Items meeting the above criteria

View and Select to Reassign Work Items meeting the above criteria

Display Counts of Work Items meeting the above Criteria

Each Work Item type has a status. A supervisor or a worker may search for a work item based on a set of criteria such as IM Consortium, County/Tribe, Team, Work Item Owner, Primary Worker or Caseload, Case, RFA or ACCESS Tracking Number. This will provide details as well as history from start to finish and who completed the work. A supervisor or worker may use this page to reassign work items to manage workload.

WORK ITEM DETAILS PAGE:

Work Item Details

Work Item Details

Work Item ID: **3000003134** Associated with: [Case - 1700541811](#)

Category: **Application**

Work Item History

2. RFA Became a Case on 08/08/2012 at 3:42 PM by XCTQ32

Work Item Details				
APP/RFA/Case	Caseload Owner	Work Item Owner	County	IM Consortium
Case - 1700541811	XCTQ32	XCTQ32	DANE COUNTY	CAPITAL CONSORTIUM

Work Item Type Details					
Type	Status	Due Date	Begin Date	End Date	End Reason
FoodShare Priority Service	Case Processing	08/08/2012	08/01/2012		

1. RFA Created/Filing Date(s) Set on 08/08/2012 at 3:42 PM by XCTQ32

Work Item Details				
APP/RFA/Case	Caseload Owner	Work Item Owner	County	IM Consortium
RFA - 1700541811	XCTQ32	XCTQ32	DANE COUNTY	CAPITAL CONSORTIUM

Work Item Type Details					
Type	Status	Due Date	Begin Date	End Date	End Reason
FoodShare Priority Service	RFA Processing	08/08/2012	08/01/2012		

Return

Every work item has a history. This page shows the progress of the work item, who completed that action, and the day the action occurred. This is the audit trail of the work item. The path of the work item is displayed starting with the most recent action first. A supervisor or worker can navigate to this page from the Work Item Search Page or by selecting the Work Item # in the Quick Select dropdown.

WORK ITEM REASSIGNMENT PAGE:

Reassign Work Items

Work Items Search Results							
	APP/RFA/Case	Primary Worker	Category	Work Item Owner	Type	Status	Due Date
<input type="checkbox"/>	RFA - 3700540230	XCTP10	Application	XCTH69	FoodShare Priority Service	RFA Processing	2012-07-31
					Health Care	RFA Processing	2012-08-23
<input type="checkbox"/>	RFA - 4700541148	XCTH69	Application	XCTH69	Health Care	RFA Processing	2012-08-31
					Family Planning Waiver	RFA Processing	2012-08-31
					FoodShare Priority Service	RFA Processing	2012-08-08
					Child Care	RFA Processing	2012-08-31
<input type="checkbox"/>	RFA - 1700541510	XCTH69	Application	XCTH69	FoodShare Priority Service	RFA Processing	2012-08-13
					Health Care	RFA Processing	2012-09-05
					Caretaker Supplement	RFA Processing	2012-09-05
<input type="checkbox"/>	Case - 9700431495	XCTH69	Application	XCTH69	Medicare Premium Assistance	Case Processing	2012-08-31
<input type="checkbox"/>	Case - 9700431495	XCTH69	Application	XCTH69	Child Care	Case Processing	2012-08-31

Work Items to Reassign

Work Item ID	APP/RFA/Case	Caseload Owner	Category	Work Item Owner

Reassign to me

Reassign to a Team :

Assign to Team Lead

Assign to Backup Leads

Assign to Members

Reassign to Specific Worker ID(s) :

Separate Worker IDs by a new line, comma, semicolon or space

What would you like to do?

Reassign Work Items in the 'Work Items to Reassign' Section

Reassign All Work Items in the 'Work Items Search Results' Section

This page allows a worker to reassign (or pull) any Work Item to themselves. Workers that have a security level of 50 or higher may reassign any Work Item to any worker within their consortia. A supervisor or worker can navigate to this page from the Work Item Search Page or the Work Item Details Page.

TRAINING:

Training on how to use the Workload Dashboard effectively will be available in the DHS Learning Center prior to the implementation date of August 27, 2012. The training update will be announced following the regular communication process for training updates.

The Workload Dashboard will be available in the CWW-Training Environment one week prior to implementation.

CONTACTS:**BEPS CARES Information & Problem Resolution Center**

*Program Categories – FS – FoodShare, MA – Medicaid, BC+ – BadgerCare Plus, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – FoodShare Employment and Training, BC+ Core – BadgerCare Plus Core, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WIA – Workforce Investment Act, Other EP – Other Employment Programs.

DHS/DHCAA/BEPS/TJ