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TO: **W-2 Agencies**
Training Staff

FROM: Janice Peters, Director
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Division of Family and Economic Security
Department of Children and Families

DFES OPERATIONS MEMO

No: 13-22

DATE: 06/13/2013

FS	☐	**MA**	☐	**BC+**	☐
SC	☐	**CTS**	☐	**FSET**	☐
BC+ Basic	☐	**BC+ CORE**	☐		
CC	☐	**W-2**	☒	**EA**	☐
CF	☐	**JAL**	☐	**RAP**	☐
Other EP	☐*				

SUBJECT: CARES Worker Web (CWW) Workload Dashboard Enhancements for Wisconsin Works (W-2) Agencies

CROSS REFERENCE:

Operations Memo 12-41: *Workload Dashboard*
Operations Memo 12-42: *Team Management Tool*
Operations Memo 12-67: *Wisconsin Works (W-2) Team Management Tool & W-2 Teams in Client Scheduling*
Operations Memo 13-16: *Workload Dashboard Enhancements*
CARES Worker Web Process Help 53: *Workload Dashboard*
CARES Worker Web Process Help 73: *Team Management*
BWF Partner Training Service Learning Center - *Workload Dashboard Training*

EFFECTIVE DATE: June 22, 2013

PURPOSE

The purpose of this memo is to provide an overview of the CARES Worker Web (CWW) Workload Dashboard and to announce Workload Dashboard enhancements that will allow Wisconsin Works (W-2) agency staff to view, assign, and reassign applications to W-2 Financial Employment Planners (FEPs) or W-2 teams.

BACKGROUND

The Department of Health Services (DHS), in coordination with the Department of Children and Families (DCF), implemented the CWW Workload Dashboard in August 2012 to support

Income Maintenance (IM) agencies' timely completion of applications and processing of six-month report forms (SMRF) for Child Care and FoodShare under their new consortia-based administrative structure. Since implementation, IM consortia have recommended Workload Dashboard enhancements. Several of these recommendations will occur June 22, 2013, and are described in Operations Memo 13-16: *Workload Dashboard Enhancements*. Additionally, the Bureau of Working Families (BWF) is implementing enhancements to support W-2 specific requirements and to make Workload Dashboard tools more useful for W-2 agencies.

Current Workload Dashboard functionality, as well as the new enhancements, are described in this operations memo. In future phases, the Workload Dashboard will provide further support to W-2 agencies by tracking timely change, review, alert, document, and discrepancy processing.

BENEFITS OF THE WORKLOAD DASHBOARD

The Workload Dashboard:

- Gives FEPs a snapshot view of their assigned applications so they may prioritize tasks;
- Helps supervisors balance workloads and monitor agency application processing;
- Allows W-2 supervisors to distantly monitor application processing timelines;
- Allows W-2 supervisors to view Dashboards of absent FEPs to consider reassigning applications that are close to reaching the '<1 day left to complete' category;
- Allows W-2 agencies to view and monitor W-2 geographical area teams' workloads and application processing timelines; and
- Supports the ability to assign and reassign applications to W-2 teams.

SUMMARY OF W-2 DASHBOARD ENHANCEMENTS

The following enhancements will be available for W-2 agencies June 22, 2013:

- **W-2 Geographical Area Team Dashboards**: Users will now have the ability to open Workload Dashboards for W-2 geographical area teams. This will show a snapshot of all Application Work Items assigned to members of that team.
- **W-2 Geographical Area Team Work Item Search Criteria**: To help W-2 agency staff find Work Items that have been assigned to members of W-2 geographical area teams, criteria have been added to the CWW 'Work Item Search' page based on the W-2 geographical area team corresponding to a specific Work Item.
- **W-2 Work Item Reassignment**: Work Item Reassignment functionality is being enhanced to better separate W-2 and IM Work Item responsibilities. W-2 Work items will only be able to be reassigned by W-2 agency staff and IM Work Items will only be able to be reassigned by IM agency staff.

Additional Dashboard Enhancements

The following enhancements will be available for all CWW users June 22, 2013:

- The Workload Dashboard will display on the user's CARES Worker Web Home page;

- Work Items can be searched and reassigned to any worker who has office access associated with that Work Item; and
- Work Item reassignment will have added security, i.e., W-2 Work Items will only be able to be reassigned by W-2 agency staff and IM Work Items will only be able to be reassigned by IM agency staff.

WORKLOAD DASHBOARD CONCEPTS

The Workload Dashboard consists of five concepts: Workload Dashboards, Work Items, Work Item Types, Work Item Status, and Teams.

1. Workload Dashboard: The Workload Dashboard provides a real-time snapshot of all the application-related Work Items assigned to one or multiple workers. This snapshot provides counts of applications sorted by the number of days left to complete the application.

2. Work Items: Each W-2 application will create an Application Work Item.

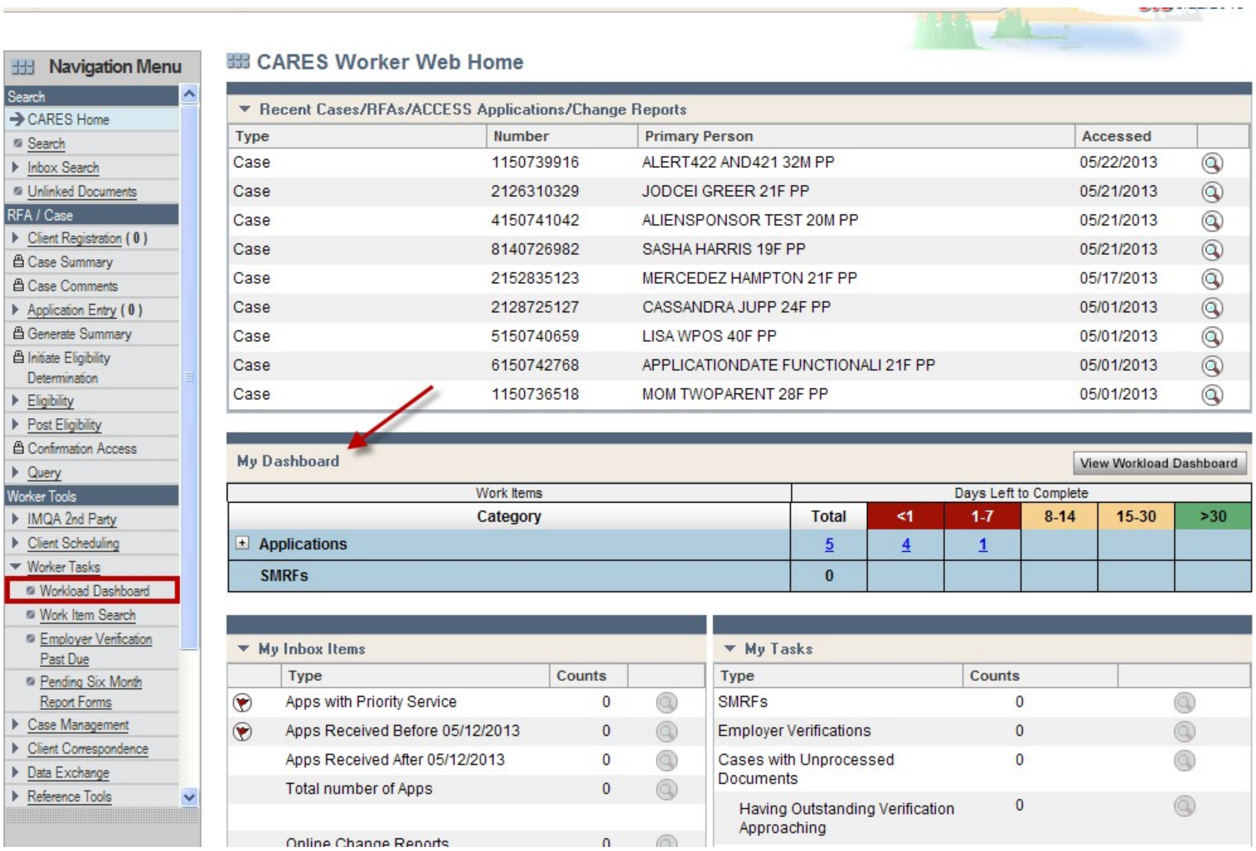
3. Work Item Types: For application and six-month report form (SMRF) Work Items, the Work Item types indicates the specific program being requested or reviewed, i.e., W-2, Child Care, FoodShare, or Health Care.

4. Work Item Type Status: The Work Item type status indicates the progress of the Work Item through the case processing flow, i.e., Unassigned Application, Assigned Application, RFA Processing, Case Processing, and Pending Verification.

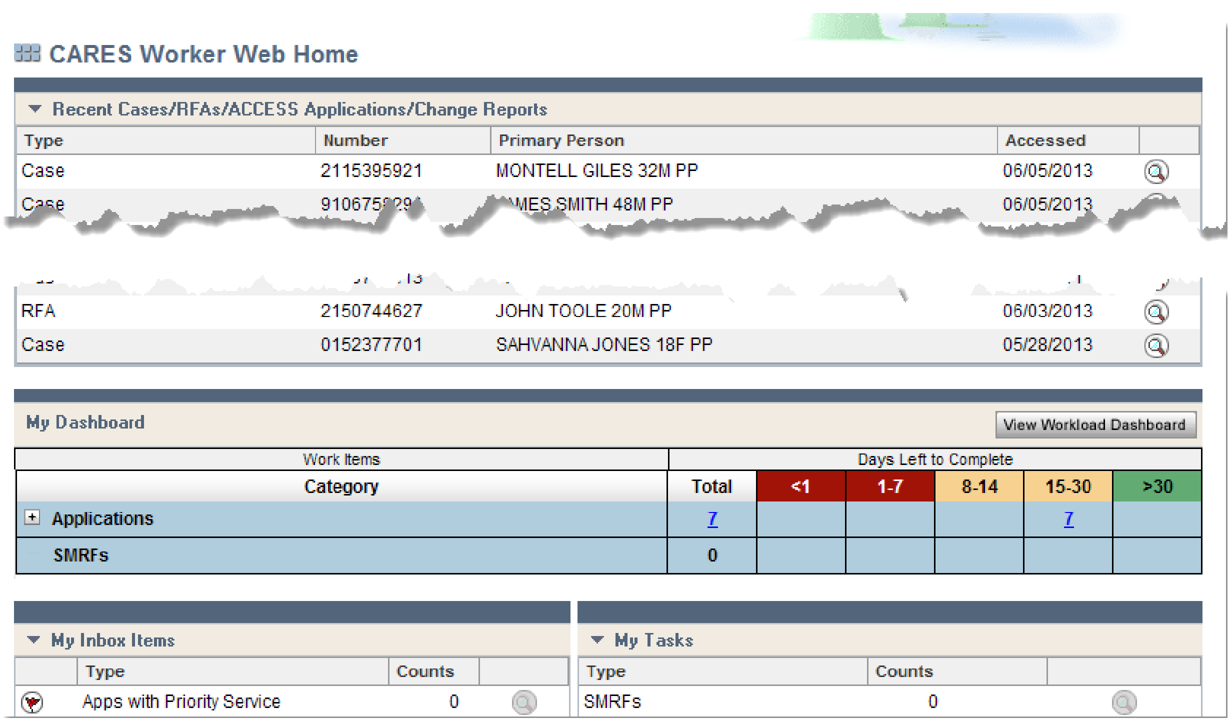
5. Teams: Teams are groups of FEPs and supervisors who have access to an office within its W-2 geographical area(s). W-2 agencies can identify, create, name, and maintain teams using the Team Management tool.

WORKLOAD DASHBOARD

The Workload Dashboard provides a real-time snapshot of the work assigned to one FEP or a team of FEPs and supervisors. For W-2, this snapshot provides counts of applications, which are arranged by the number of days left to complete the work. The ‘Days Left to Complete’ is displayed in calendar days. Workers are able to use the Workload Dashboard to find and prioritize applications according to how quickly they need to be completed. When either an application is withdrawn or the FEP confirms W-2, the application Work Item is no longer displayed on the dashboard.



Currently, workers must access their Workload Dashboard from the CWW Navigation Menu. Effective June 22, 2013, the Workload Dashboard will also display on the user's CARES Worker Web Home page.

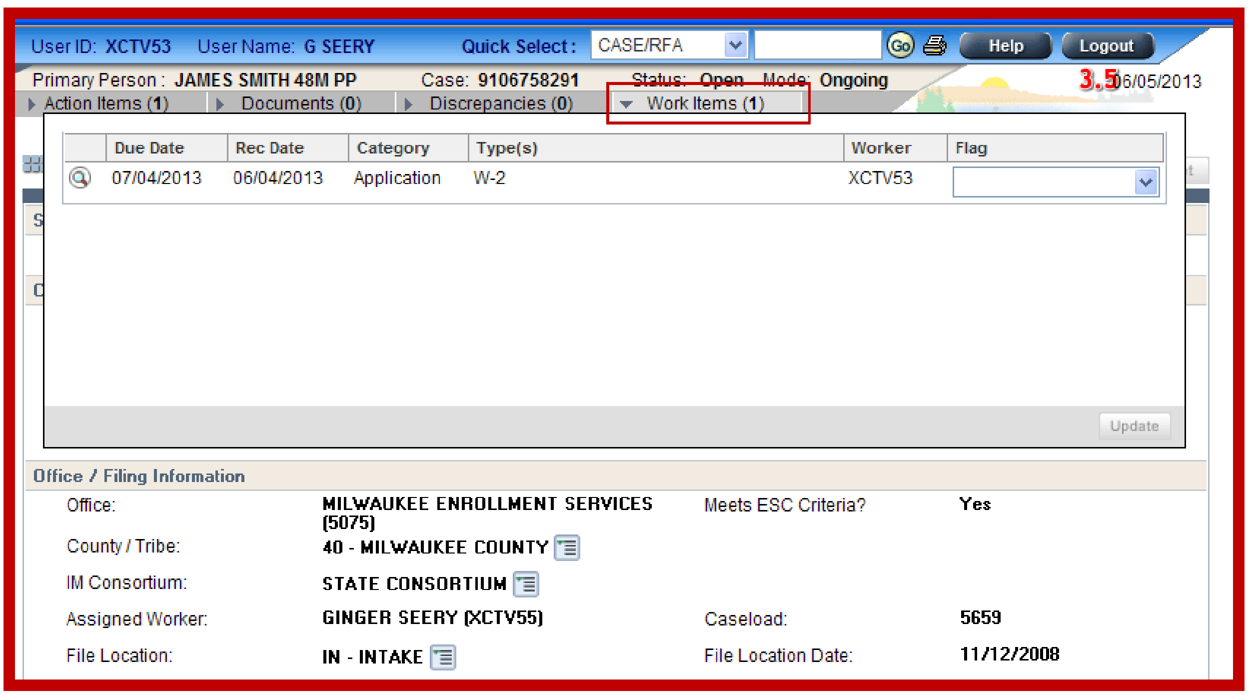


Each time workers access the Workload Dashboard from the Navigation Menu, their individual dashboard will display. Workers with a security level of 25 or above are able to open and view other worker's dashboards in their geographical area or a team dashboard of any team to which they belong. Workers with a security level of 50 or above may open and view the dashboard of any worker or team.

Dashboards will remain open until the worker closes them. Viewing additional dashboards will help monitor workloads of individual workers and teams. FEPs and supervisors with a security level of 50 or above also have the ability to assign and reassign application Work Items to other workers or teams. For more information on how to access a Workload Dashboard, see [Process Help, 53.2: Opening a Workload Dashboard.]

WORK ITEMS

The Workload Dashboard tracks W-2 applications from the date the application is filed (application filing date) through the date the FEP confirms W-2 eligibility for the case. The Dashboard displays the total number of application Work Items and the days left to complete the associated Work Items. Additionally, a drop down menu of Work Items for each case is displayed in the Information Panel shown on individual cases.



By selecting the magnifying glass, a worker can drill down to view more information including Work Item Status and specific Work Item Type information. Effective June 22, 2013, Work Items can be searched and reassigned to any worker who has office access associated with that Work Item.

CWW creates a W-2 application Work Item when W-2 agency staff:

- Initiate a W-2 application using the 'Record Group Level Program Request' and enter a new filing date;
- Create an RFA using Client Registration and enter a W-2 filing date; and

- Change the filing date on the CWW 'W-2 Program Request' page and update the 'Requesting this Program/Subprogram of Assistance' field from 'no' to 'yes'.

The following actions will complete and remove a W-2 application Work Item from the dashboard:

- The FEP confirms the W-2 assistance group;
- The W-2 agency staff changes the group level request to 'no' in the Group Level Program request page;
- The W-2 agency withdraws an RFA ;
- CWW denies an RFA because it was created over 30 days ago; and
- The W-2 agency manually withdraws the Work Item from the 'Work Item Details' page (security level 50 and above) – see Process Help 53.5: Work Item Details

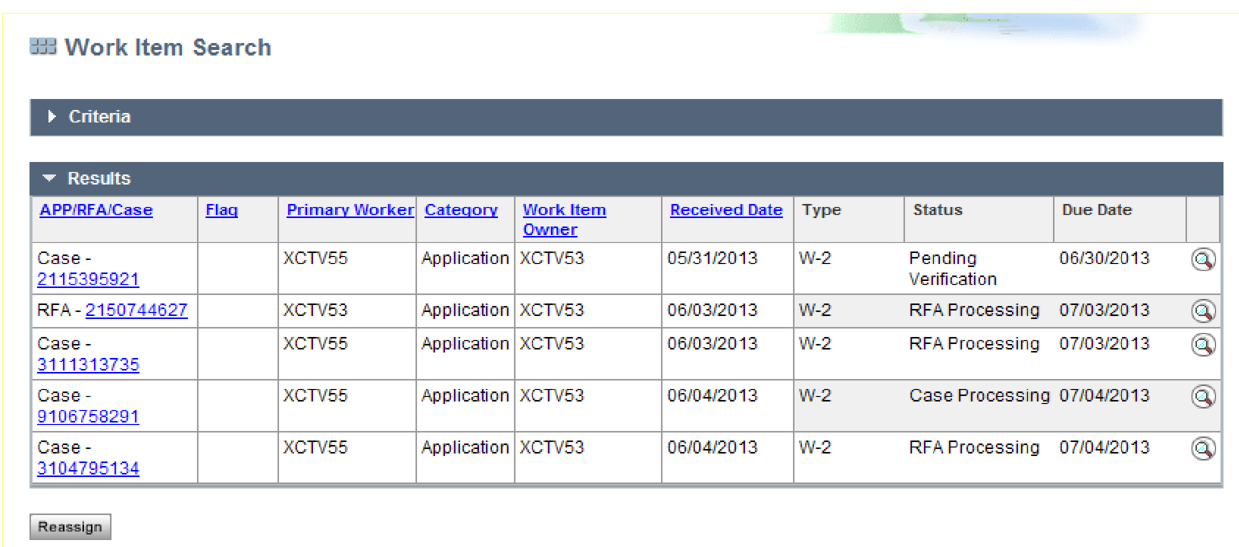
For more information on Work Items, see Process Help, 53.3: Understanding a Workload Dashboard.

Work Item Search

The 'Work Item Search' page allows users to search for application Work Items. Users may come to this page:

- When clicking on the 'Work Item Search' link in the Navigation Menu under the 'Worker Tasks' section within Worker Tools;
- When clicking on the 'Work Items' tab in the Information Panel at the top of the page when in the context of a case;
- When clicking on a dashboard count through the 'Workload Dashboard' page;
- When clicking on a dashboard count under 'My Dashboard' in the CWW Homepage;
- After reassigning multiple Work Items; or
- After viewing the details of a specific Work Item that was selected from the 'Work Items Results'.

The page consists of two major sections: 'Criteria' and 'Results'. Both sections appear on the same page and users can expand and collapse as necessary.



Work Item Search

Criteria

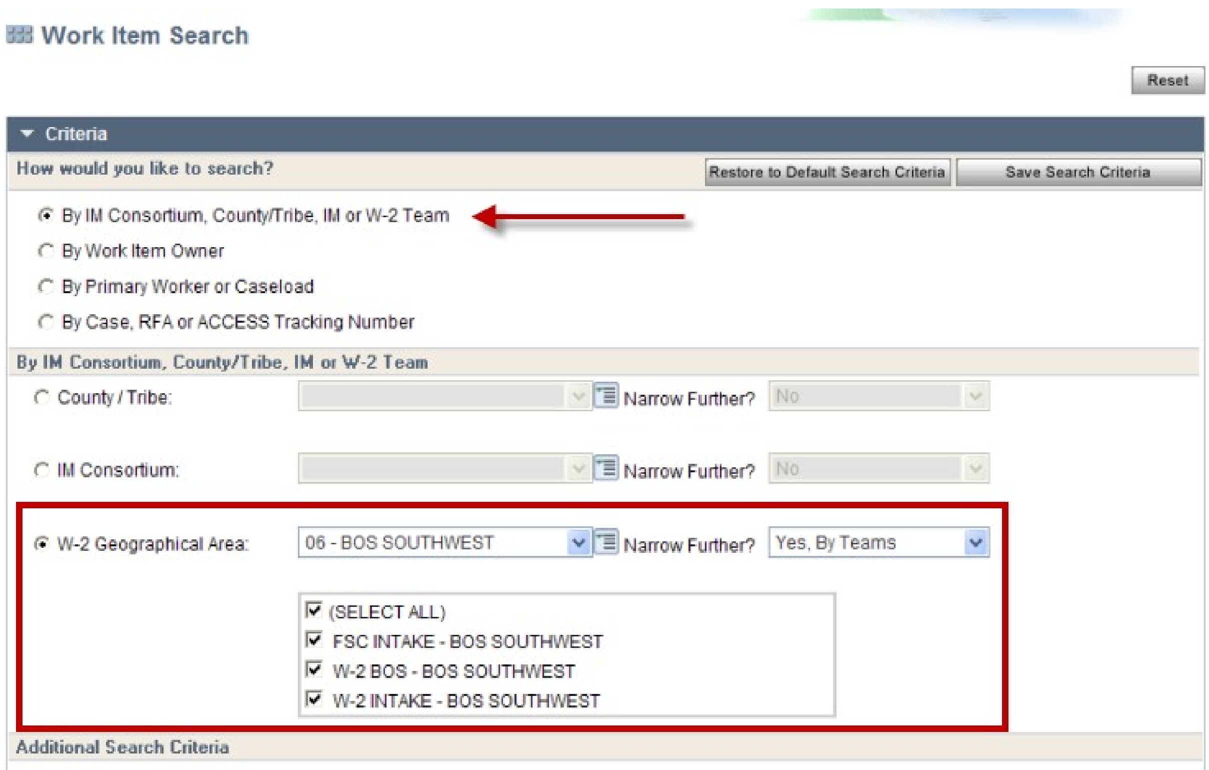
Results

APP/RFA/Case	Flag	Primary Worker	Category	Work Item Owner	Received Date	Type	Status	Due Date
Case - 2115395921		XCTV55	Application	XCTV53	05/31/2013	W-2	Pending Verification	06/30/2013
RFA - 2150744627		XCTV53	Application	XCTV53	06/03/2013	W-2	RFA Processing	07/03/2013
Case - 3111313735		XCTV55	Application	XCTV53	06/03/2013	W-2	RFA Processing	07/03/2013
Case - 9106758291		XCTV55	Application	XCTV53	06/04/2013	W-2	Case Processing	07/04/2013
Case - 3104795134		XCTV55	Application	XCTV53	06/04/2013	W-2	RFA Processing	07/04/2013

Reassign

If a user navigates to the 'Work Items Search' page by clicking on a dashboard count through the 'Workload Dashboard' page or by clicking the 'Work Items' link in the context of the case, the search criteria would be prefilled on this page.

Effective June 22, 2013, users will be able to search for Work Items assigned to a W-2 team. When the 'By IM Consortium, County/Tribe, IM or W-2 Team' radio button in the 'How would you like to search?' section is selected, CWW displays the 'By IM Consortium, County/Tribe, IM or W-2 Team' section. W-2 agency staff may then select the 'W-2 Geographical Area' radio button, select a geographical area from the drop-down menu, and select from the available teams. The drop-down menu will display teams that W-2 agencies have created across the entire geographical area. Team members from a different geographical area may be part of any team, as long as these individuals have access to an office within the team's geographical area.



W-2 agencies can use the 'Work Item Search' page to:

- Find W-2 applications assigned to a FEP or W-2 team;
- Monitor those applications for timely processing;
- Identify application Work Items to reassign to other FEPs; or
- Track group level requests that have expired (gone beyond 30 days) and must be withdrawn.

Example: The W-2 agency has assigned several staff to take W-2 applications via the 'group level program request' or RFA functionality. Initially, each of these W-2 applications will be assigned to the individual who took the application. To balance workloads, a W-2 intake supervisor searches for these application Work Items and reassigns them to various FEPs within the agency.

For more information on searching for W-2 application Work Items, see Process Help, 53.6: Work Items Details and page 21 of the Workload Dashboard training, located in the BWF Partner Training Service Learning Center.

Reassigning Application Work Items

Work item reassignment functionality is being enhanced to better separate W-2 and IM Work Item responsibilities. Effective June 22, 2013, W-2 Work Items will only be able to be reassigned by W-2 agency staff and IM Work Items will only be able to be reassigned by IM agency staff.

The 'Reassign Work Items' page allows W-2 agencies to reassign one or more application Work Items to one or more FEPs (see Process Help- 53.5.6 – View and Select to Reassign Work Items) Users can reach this page three ways:

1. By selecting 'View and Select to Reassign Work Items meeting the above criteria' and clicking the 'Go' button on the 'Work Item Search' page.
2. By clicking the 'Reassign Work Items' button on the 'Work Item Search' page from the 'Results' section.
3. By clicking the 'Reassign' button on the 'Work Item Details' page.

Selecting Items to Reassign

From the 'Work Item Search Results' list, the user can reassign all work items by "Select All" option or select specific work items to be reassigned by checking the corresponding checkboxes and clicking the 'Add' button. CWW adds the checked items to the 'Work Items to Reassign' section. Clicking the 'Reset' button removes any checkmarks from the 'Work Items Search Results' list.

Reassigning Options

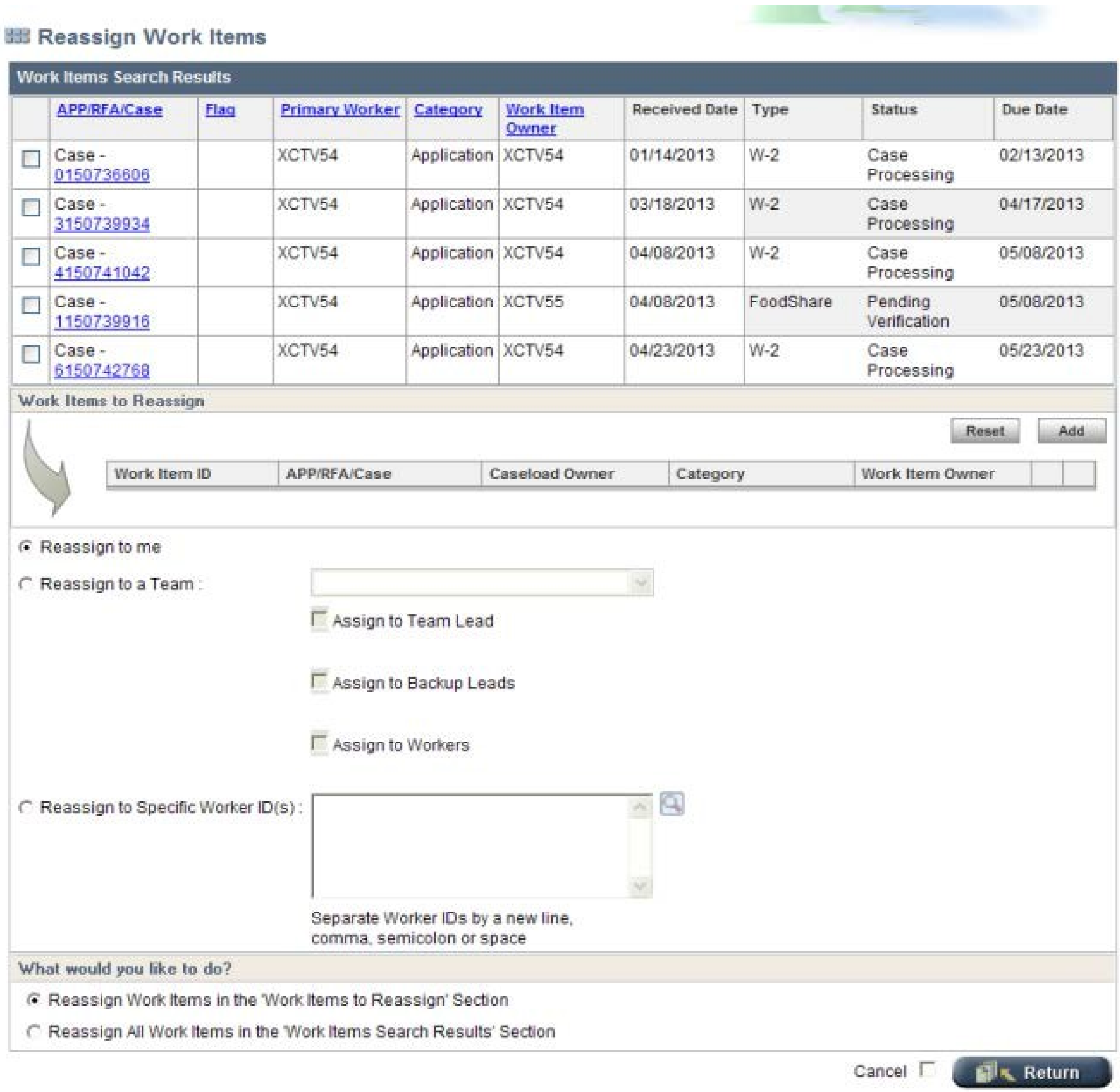
In the 'Work Items to Reassign' section is a list of three options to help the W-2 agency staff reassign Work Items.

1. Reassign to me – Reassigns the Work Items to the signed-in worker. For a user to reassign a Work Item to him or herself, he or she must have update access to the office of the Work Item.
2. Reassign to a Team – In the dropdown box, CWW displays each County, Consortium, and W-2 geographical area team assigned to the office of the signed-in worker. The worker must select a team. After selecting the appropriate team, the user must select one or all of the following options for the team:

    - Assign to Team Lead
    - Assign to Backup Leads
    - Assign to Workers

    For example, if the user wants to reassign the Work Items to all members of a team, except for the team lead, the user would check the 'Assign to Backup Leads' and 'Assign to Workers' boxes. If the user wants to reassign the Work Items to just the team lead, the user would check the 'Assign to Team Lead' box. CWW disables this option for users with a security level 25.

3. Reassign to Specific Worker ID(s) – If the user selects this option, he or she must enter at least one Worker ID with access to the Work Item's office. CWW disables this option for users with a security level 25.



WORK ITEM TYPES

A Work Item type indicates the program with which the Work Item is associated. For W-2, this will be W-2 applications.

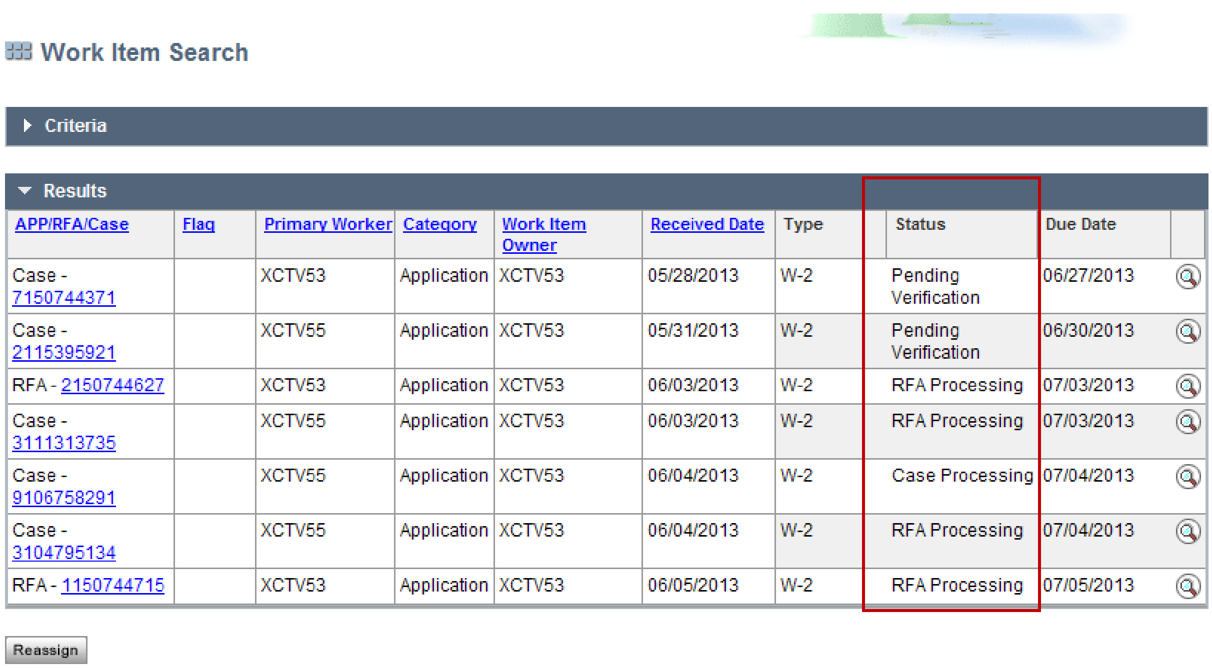
WORK ITEM STATUS

The Work Item status indicates the status of the application. The Work Item statuses are described in the chart below.

Application Status	Definition of the Statuses
Unassigned	The RFA has been created, but not assigned to a W-2 worker, and the process of creating a W-2 case from the RFA has not been started.

Assigned Application	The RFA or group level program request has been created and assigned to a worker, but the process of creating a W-2 case from the RFA has not been started.
RFA Processing	An RFA has been created with a filing date and the process of creating a W-2 case from the RFA has not been started. Or, a group level program request with a filing date has been made, but not yet processed.
Case Processing	Intake has been initiated, but the driver flow is incomplete.
Pending Verification	The worker has completed the intake driver flow, but the case is pending for verification.

Unassigned RFAs are assigned to the W-2 agency's unassigned Work Item coordinator. All other W-2 Work Items are, by default, assigned to the signed-in worker.


Work Item Search

Criteria

Results

APP/RFA/Case	Flag	Primary Worker	Category	Work Item Owner	Received Date	Type	Status	Due Date
Case - 7150744371		XCTV53	Application	XCTV53	05/28/2013	W-2	Pending Verification	06/27/2013
Case - 2115395921		XCTV55	Application	XCTV53	05/31/2013	W-2	Pending Verification	06/30/2013
RFA - 2150744627		XCTV53	Application	XCTV53	06/03/2013	W-2	RFA Processing	07/03/2013
Case - 3111313735		XCTV55	Application	XCTV53	06/03/2013	W-2	RFA Processing	07/03/2013
Case - 9106758291		XCTV55	Application	XCTV53	06/04/2013	W-2	Case Processing	07/04/2013
Case - 3104795134		XCTV55	Application	XCTV53	06/04/2013	W-2	RFA Processing	07/04/2013
RFA - 1150744715		XCTV53	Application	XCTV53	06/05/2013	W-2	RFA Processing	07/05/2013

Reassign

For more information on how application Work Item statuses are triggered and assigned, see Process Help 53.3: Understanding a Workload Dashboard.

Days Left to Complete

CWW sorts the W-2 application Work Items by the number of calendar days left to complete the Work Item.

The ‘Days Left to Complete’ categories are:

- Less than 1 calendar day left to complete, Priority work (column header is red)
- 1-7 calendar days left to complete (column header is red)
- 8-14 calendar days left to complete (column header is yellow)
- 15-30 calendar days left to complete (column header is yellow)
- Greater than 30 calendar days left to complete (column header is green)

My Dashboard View Workload Dashboard

Work Items	Days Left to Complete					
Category	**Total**	**<1**	**1-7**	**8-14**	**15-30**	**>30**
Applications	1				1	
Pending Verification	1				1	
SMRFs	0					

The ‘Days Left to Complete’ is calculated by subtracting the current date from the Work Item type due date. Because applications are valid for 30 calendar days unless extended, W-2 application Work Items by default always initially fall into the 15-30 calendar days to complete. If a FEP pends an application, thereby changing the Work Item from Case Processing to Pending Verification status, the ‘Days Left to Complete’ will not align with the verification item’s due date, but will continue tracking ‘Days Left to Complete’ based on the initial 30-day timeframe.

- ***Note***: W-2 agencies must adhere to timelines defined in policy when completing W-2 applications and verifying information. (See W-2 Manual, 1.4.5 and 4.1.3) Agencies should continue using alerts as notification of upcoming verification due dates. BWF will consider changing tools to manage application timeliness in a future Dashboard enhancement.

For more information, see Process Help, 53.3.7: Days Left to Complete.

TEAMS

The current Team Management tool allows supervisors and workers who have update access to at least one office associated with that team’s W-2 geographical area to create teams of workers. Effective June 22, 2013, supervisors and workers will be able to open a Dashboard view and will be able to search for Work Items assigned to a W-2 geographical area team.

For more information on Team Management, see Operations Memo 12-42: *Team Management Tool*, Operations Memo 12-67: *Wisconsin Works (W-2) Team Management Tool & W-2 Teams in Client Scheduling,* and Process Help, 73 – Team Management.

TRAINING

The BWF Partner Training Service (PTS) Learning Center will provide updated training on the Workload Dashboard effective June 12, 2013.

AGENCY ACTION

W-2 agencies must familiarize their staff with the Workload Dashboard tool and its functionalities and are encouraged to discuss ways in which the tool can be used to manage timely application processing. W-2 agencies are encouraged to take advantage of the Workload Dashboard tool.

CONTACTS

For W-2 Policy Questions in the Balance of State: Bureau of Regional Operations, W-2 Regional Coordinators

For W-2 Policy Questions in Milwaukee: Milwaukee Operations Section Regional Administrators

For CARES Processing Questions: W-2 Help Desk

*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.

DCF/DFES/BWF/GS