



WARD TASKS

Click on Tasks to view a grid of a task record associated with a client

Client: TEST, JOE
Face Sheet: \$0.00
Events
Appointment History
Address History
Contacts
Status History
Transactions
Assets
Life Insurance
Tasks
Liabilities
Annual Reports
Diagnoses
Incidents
Reports
Word Doc Forms
PDF Forms
Attachments
Victimization
Release

The Client's Task grid has the following views:

- ✓ Due
- Denied
- Completed
- All

Due: This is the default view. These are all Tasks for the client where the status is Pending, Submitted or Resubmitted.

Denied: These are all Tasks for the client where the status is Denied.

Completed: These are all Tasks for the client where the status is Completed.

All: These are all Tasks for the client regardless of status.

Click Insert to add a new task

Tasks

Insert Task

Save

Save and Re-Insert

Creation Date: 04/16/2021 Requested By:

Select Client:

Client:

Category:

Action:

Select Assignee:

Assignee:

Due Date: 

Details:

Notes:

Save

Save and Re-Insert

The Category/Action dropdowns contains the following values:

Task Categories/Actions

Inquiry/referral

Actions:

Assigning follow up or to get more info

Track referral status

Court dates/assigning coverage

Aging Out Kids

Case Set Up

Actions:

New case needs

Obtaining records (any records, reports, info for medical and psych, MARS)

- Twist reports
- IDT/court records
- CourtNet/criminal hx
- Family/other contact
- Initial assessment/annual report
- Banking/EBT cards
- Medical/Ins cards
- ID/SSA card
- Birth Certificate
- Asset identification
- Face sheet demographics

Placement/Referral

Actions:

- 30-day or other discharge notices
- Assistance with placement (ESH, CSH, etc)
- Need to address placement issues (moratorium/sp focus facilities)
- Need to make/seek referrals or follow up to referral sent
- Out of region placement
- Address history

Face to Face (Special Circumstance)

Actions:

- Follow up- GFSOS, BM or other assigns a face to face for any reason
- Courtesy visit

Case review

Actions:

- Follow up- assign any tasks identified in case review

Legal/court

- Assign court hearing coverage
- Assign follow up from court hearings/legal issues
- Annual Report Communication
- Limited Renewal Communication
- Requests for modification/Rights restoration
- OLS requests for surgery, correcting appointment orders, endorsing checks, out of state placement, CPS/family court cases, and other legal needs
- Court case transfer

Program/Service Connection

Actions:

- Referrals for/connection to needed services (ACT, SCL, Etc)
- Victimization issues (record, events, face sheet, twist)

Incidents

Actions:

- Assigning tasks for follow up
- Missing information/data needs

Mental Health Care

Actions:

- 202A/Crisis Mental Health needs
- 202B/Crisis ID/DD needs
- CMHC Involvement/CSU

Medication/Pharmacy needs/issues
Establishing new services/referral
Psychological Assessment/Testing and results
ACT Services

Physical Health Care

Actions:

Establishing new services
Emergency needs (access to meds, medical care, etc)
Medical/Vision/Dental follow up needs (annual exams, glasses, dentures, hearing aids, etc)
Medication/Pharmacy needs/issues

Fiduciary Issues

Actions:

Budgets (initiate/revise)
Banking/Accounts/check tracking
Assets (includes inventories, junking titles, estimates, appraisals, titles, securing personal prop, etc.)
Liabilities (obtaining bills, addressing debt)
Payment requests/needs/Spending
Facility Payment issues
Pharmacy Coverage/Payment Issues
Trust
Burial/Life Ins.
Resignation
Taxes

Benefits Issues

Actions:

Intake/eligibility
Medicaid/PA
CIS/Caretaker
Food Stamps
SSI/SSA coverage/issues/certification/recertification/disability assessment
Location Changes/Changes in LOC

Follow up required

Actions:

Misc follow up

The Task Due Date is a required field.

All Active users appear in the Assignee dropdown so they can be assigned a task, but only GSSOS, Branch Manager, Assistant Director, and Administrator can actually assign the tasks to other users. All other users can only assign themselves a task

When a Task is inserted, it has a status of Submitted. Once it has been viewed by the Assignee, that status will change to Pending.

The Task status can be updated using the buttons on the view page of the Task



CASE MANAGEMENT/TASKS

When users log in, they will be directed to Case Management/Tasks/My Assigned Tasks Due. These are tasks where they are the Assignee, that are in a Submitted or Pending view.

Tasks

View

1 - 4 of 4 [First Page](#) | [Previous](#) | [Next](#) | [Last Page](#)

<input type="checkbox"/>		Due Date	Client	Category	Action	Details	Status
<input type="checkbox"/>		04/08/2021		Follow Up Required	Misc follow up		SUBMITTED
<input type="checkbox"/>		04/18/2021		Benefits Issues	Food Stamps	TEST	SUBMITTED
<input type="checkbox"/>		04/24/2021		Benefits Issues	Location Changes/Changes in LOC		SUBMITTED
<input type="checkbox"/>		04/30/2021		Face to Face (Special Circumstance)	Courtesy visit		SUBMITTED

1 - 4 of 4 [First Page](#) | [Previous](#) | [Next](#) | [Last Page](#)

Rows that have “red” text are Tasks that have not yet been Completed and are past their Due Date

Rows that have “blue” text are Tasks that are approaching their Due Date

Rows that have bold text are new Tasks assigned to you by another user

Rows that are pink, are Tasks you have assigned yourself

Clicking on a Task opens that Task Record and changes the status from Submitted to Pending. This indicates the user has read the Task

View Edit

Edit Task

Save Changes <-Save and Edit Prev My Assigned Tasks Due

Creation Date: 04/17/2021 Requested By: #nick
 Status: PENDING
 Select Client: [Client Name]
 Client: [Client Name]
 Category: Benefits Issues
 Action: Food Stamps
 Assignee: Somofftest, Nick
 Due Date: 04/18/2021

Details: TEST

Notes:

Save Changes Complete Deny

User can Complete or Deny the Task, using the buttons at the bottom of the page. Using these buttons will update the Status of the Task

Clicking the Completed button will pop up a box too enter the details

Completion Details

TESTING THE COMPLETED BUTTON

Cancel OK

This sets the Completed Date, Completed By and displays the Completion Details

View Task <--Prev-- My Assigned Tasks Due --Next-->

Creation Date: 04/17/2021 Requested By: #nick
Completed Date: 04/17/2021 Completed By: testnick
Status: COMPLETED
Select Client: [Redacted]
Client: [Redacted]
Category: Benefits Issues
Action: Food Stamps
Assignee: Somofftest, Nick
Due Date: 04/18/2021
Details: TEST
Completed Description: TESTING THE COMPLETED BUTTON
Notes: [Redacted]

Clicking the Deny button will pop up a box too enter the details

Denial Reason

TESTING THE DENIAL REASON |

Cancel OK

This sets the Denied Date, Denied By and displays the Denied Details

View Edit

View Task <--Prev-- My Assigned Tasks Due --Next-->

Creation Date: 04/17/2021 Requested By: #nick

Denied Date: 04/17/2021 Denied By: testnick

Status: DENIED

Select Client: [Redacted]

Client: [Redacted]

Category: Benefits Issues

Action: Location Changes/Changes in LOC

Assignee: Somofftest, Nick

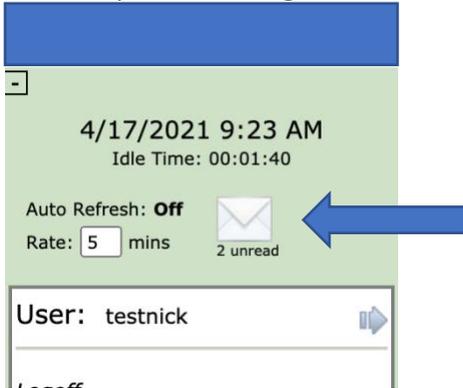
Due Date: 04/24/2021

Details: [Redacted]

TESTING THE DENIAL REASON

Denied Reason: [Redacted]

When a user is assigned a Task they will get a message. This is indicated by the Envelope icon at the top of the Navigation Menu



Clicking on the Envelope will display the Messages grid

Messages

Search Filter Message Created Date Column View unread

1 - 2 of 2 First Page | Previous | Next | Last Page

<input type="checkbox"/>		Message Created Date	From	To	Subject	Message
<input type="checkbox"/>		04/17/2021	#nick	testnick	Task Assigned	You have been assigned a new Task for client W
<input type="checkbox"/>		04/17/2021	#nick	testnick	Task Assigned	You have been assigned a new Task for client W

1 - 2 of 2 First Page | Previous | Next | Last Page

Mark as Read Mark All As Read

Clicking on the Message will take the user to the Task page

DENIED TASKS

When a Task is “denied”, a reason box will pop up allowing the user to insert a reason

Denial Reason

No details provided

Cancel OK

View Edit

Test Sys

View Task <--Prev-- My Assigned Tasks Due --Next-->

Creation Date: 05/20/2021 Requested By: testadmin

Denied Date: 05/20/2021 Denied By: testnick

Status: DENIED

Select Client: [Redacted]

Client:

Category: Case Review

Action: Follow up - assign any tasks identified in case review

Assignee: Nick, Test

Due Date: 05/28/2021

Details:

No details provided

Denied Reason:

Notes:

The user who assigned the Task will be notified via a message.

5/20/2021 8:26 AM
Idle Time: 00:00:14

Auto Refresh: **Off**
Rate: 5 mins 1 unread

User: testadmin

User: testadmin
Change Password
Reports
Messages
Logoff

Messages

Search Filter Message Created Date Column View unread

1 - 1 of 1 [First Page](#) | [Previous](#) | [Next](#) | [Last Page](#)

<input type="checkbox"/>		Message Created Date	From	To	Subject	Message	Save For Manual Delete
<input type="checkbox"/>		05/20/2021	testnick	testadmin	Task DENIED	A Task you requested for client [Redacted] been DENIED.	No

1 - 1 of 1 [First Page](#) | [Previous](#) | [Next](#) | [Last Page](#)

Mark as Read Mark All As Read

Clicking on the message will open the Task. The user can review the Denied Reasons, edit the page and resubmit.

View Edit

Edit Task Save Changes <-Save and Edit Prev Due Save and Edit Next->

Creation Date: 05/20/2021 Requested By: testadmin
 Denied Date: 05/20/2021 Denied By: testnick
 Status: DENIED
 Select Client: [Redacted] Client: [Redacted]
 Category: Case Review Action: Follow up - assign any tasks identified in case review
 Select Assignee: Nick, Test Assignee: Nick, Test
 Due Date: 05/28/2021

Details: Oh sorry, here are the details....
 No details provided

Denied Reason:

Notes:

Save Changes Resubmit

This will update the Task to a status of Resubmitted

View Edit

View Task <--Prev-- Due --Next-->

Creation Date: 05/20/2021 Requested By: testadmin
 Denied Date: 05/20/2021 Denied By: testnick
 Resubmitted Date: 05/20/2021 Resubmitted By: testadmin
 Status: RESUBMITTED
 Select Client: [Redacted] Client: [Redacted]
 Category: Case Review Action: Follow up - assign any tasks identified in case review
 Select Assignee: Nick, Test Assignee: Nick, Test
 Due Date: 05/28/2021

Details: Oh sorry, here are the details....
 No details provided

Denied Reason:

Notes:

That Task will now show back on the My Assigned Tasks Due grid view for the Assigned user.

5/20/2021 8:29 AM
Idle Time: 00:00:11
Auto Refresh: Off
Rate: 5 mins 3 Unread

Tasks

Search Filter Due Date Column View My Assigned Tasks Due Insert

1 - 1 of 1 First Page Previous Next Last Page

<input type="checkbox"/>	Due Date	Client	Category	Action	Details	Status	Requested By	Last Modifier
<input type="checkbox"/>	05/28/2021		Case Review	Follow up - assign any tasks identified in case review	Oh sorry, here are the details....	RESUBMITTED	testadmin	testadmin

1 - 1 of 1 First Page Previous Next Last Page

Delete

Case Management

- Clients
- Tasks**
- Payment Requests
- Reports
- Family Support

NOTES ABOUT TASKS

1. Being assigned a Task by another user will generate a Message to the Assignee (on insert OR edit of the Assignee field)
2. A message is sent to the Requestor when Completed or Denied - only if requestor is different from the assignee
3. Only GSSOS, Branch Manager, Assistant Director, and Administrator users can assign tasks to any user. For all other users, the Assignee dropdown is grayed out and it will default to that user upon saving the record.