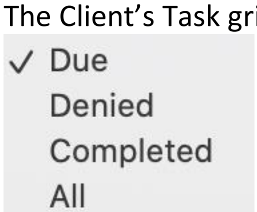
WARD TASKS

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

The Client's Task grid has the following views:



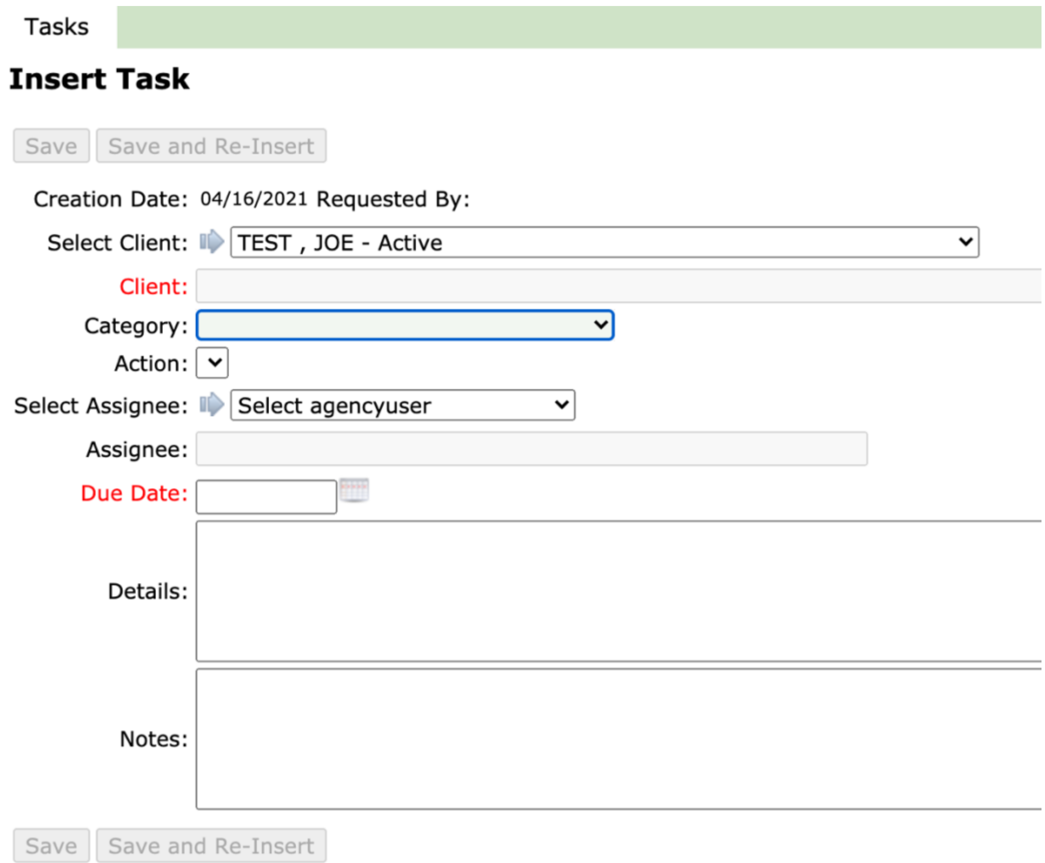
Due: This is the default view. These are all Tasks for the client where the status is Pending, Submitted or Resubmitted.

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



The Category/Action dropdowns contains the following values:

<u>Task Categories/Actions</u>

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

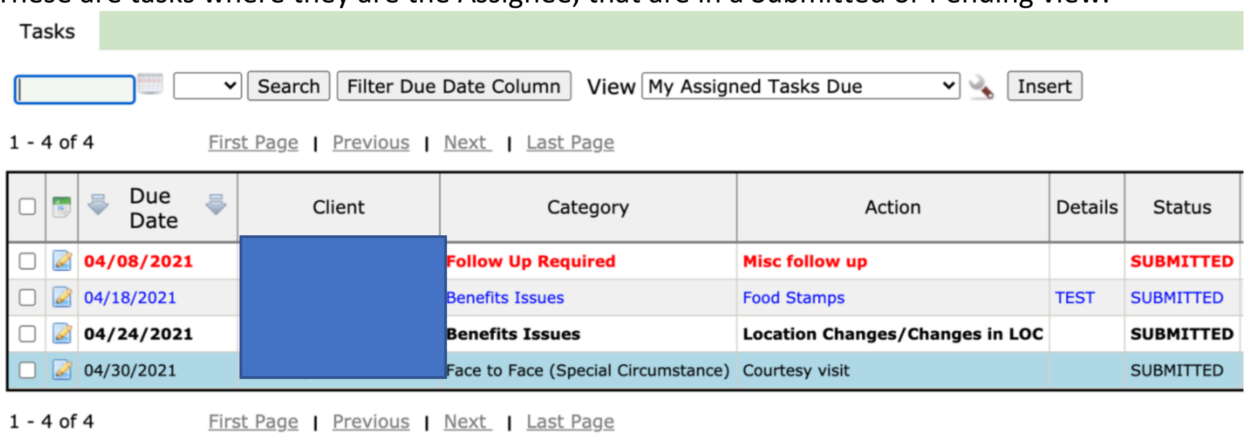
When a Task is inserted, it has a status of Submitted. Once it has been viewed by the Assignee, that status will change to Pending.

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

Complete Deny

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

Search | Filter Due Date Column | View My Assigned Tasks Due | Insert

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Due Date	Client	Category	Action	Details	Status
04/08/2021	[redacted]	Follow Up Required	Misc follow up		SUBMITTED
04/18/2021		Benefits Issues	Food Stamps	TEST	SUBMITTED
04/24/2021		Benefits Issues	Location Changes/Changes in LOC		SUBMITTED
04/30/2021		Face to Face (Special Circumstance)	Courtesy visit		SUBMITTED

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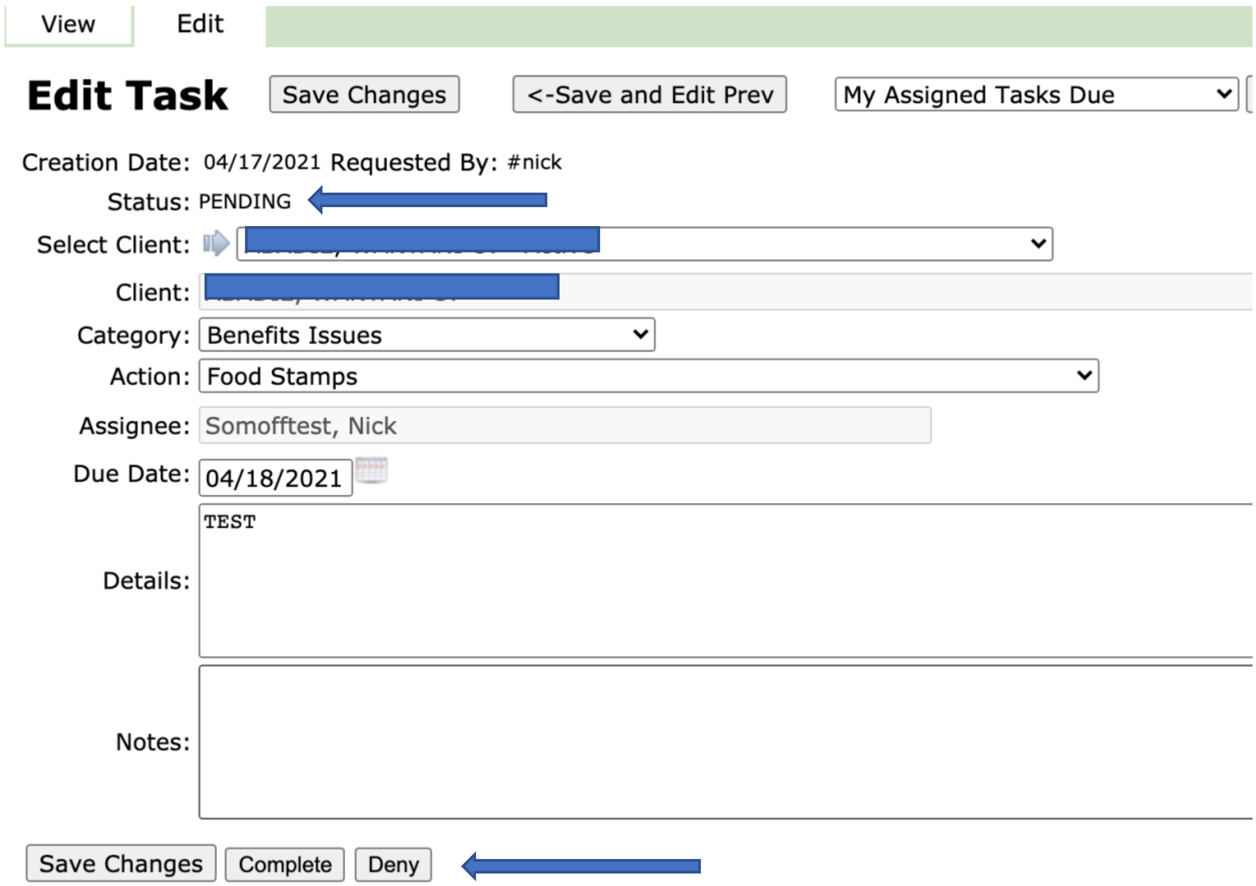
Rows that have “red” text are Tasks that have not yet been Completed and are past their Due Date

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

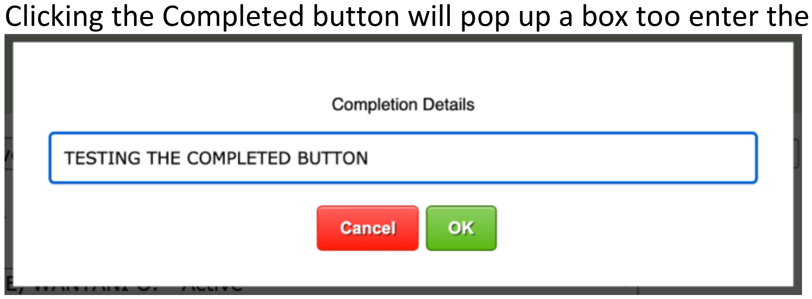
Rows that are pink, are Tasks you have assigned yourself

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

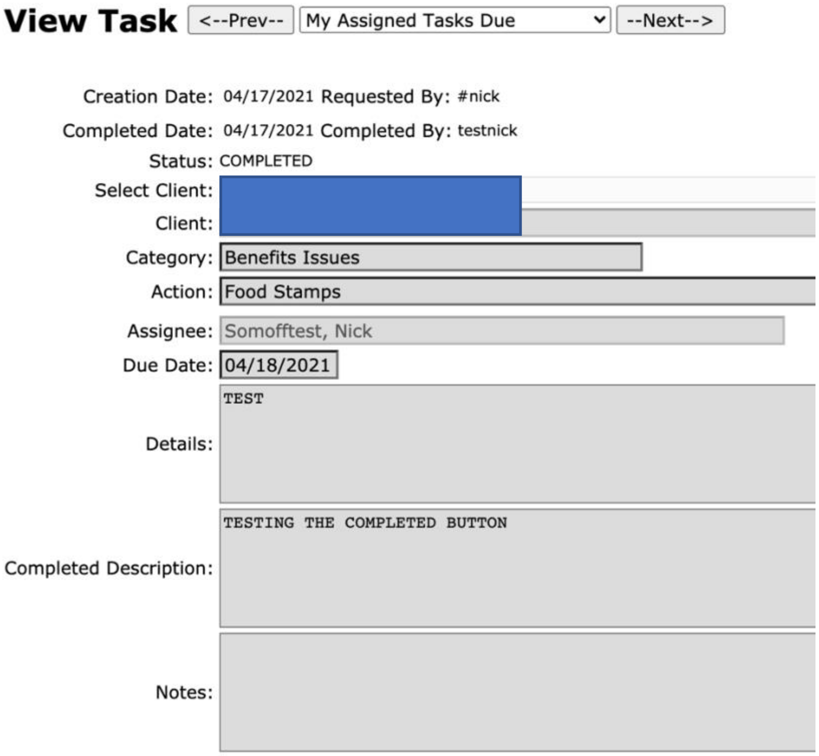


User can Complete or Deny the Task, using the buttons at the bottom of the page. Using these buttons will update the Status of the Task

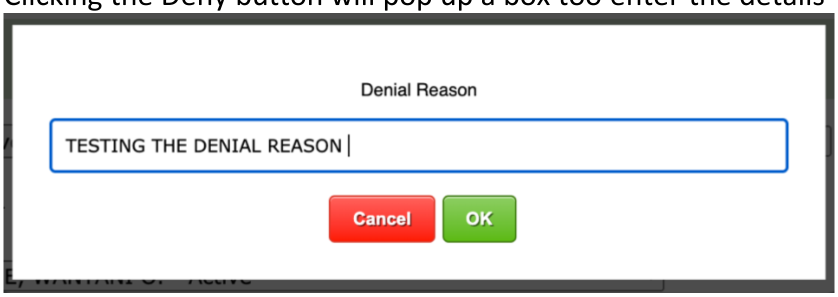
Clicking the Completed button will pop up a box too enter the details



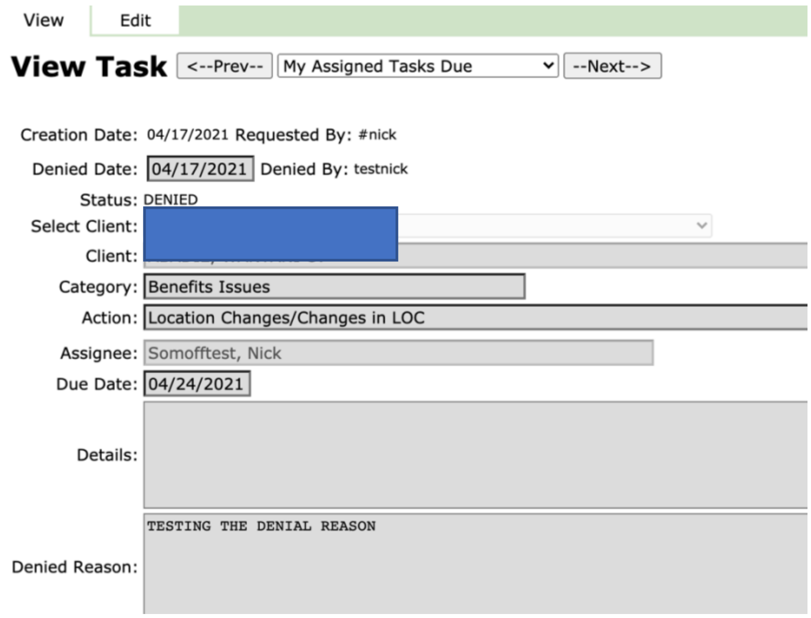
This sets the Completed Date, Completed By and displays the Completion Details



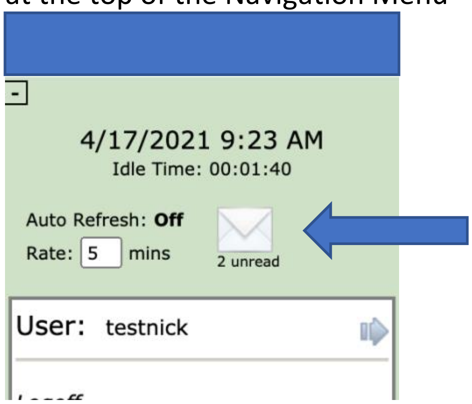
Clicking the Deny button will pop up a box too enter the details



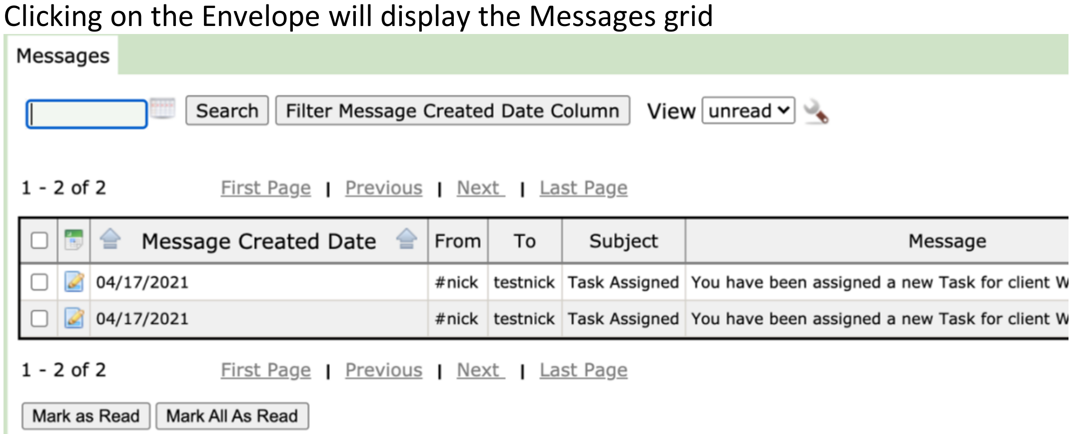
This sets the Denied Date, Denied By and displays the Denied Details



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



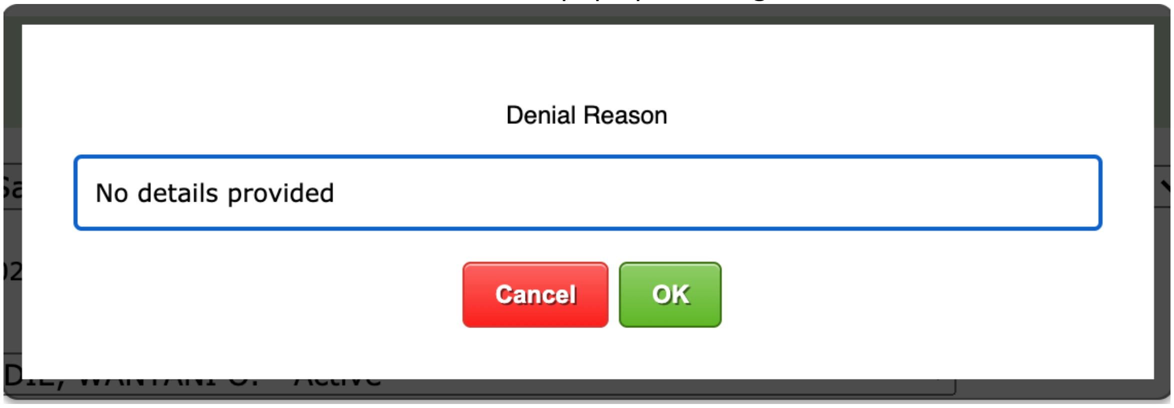
Clicking on the Envelope will display the Messages grid

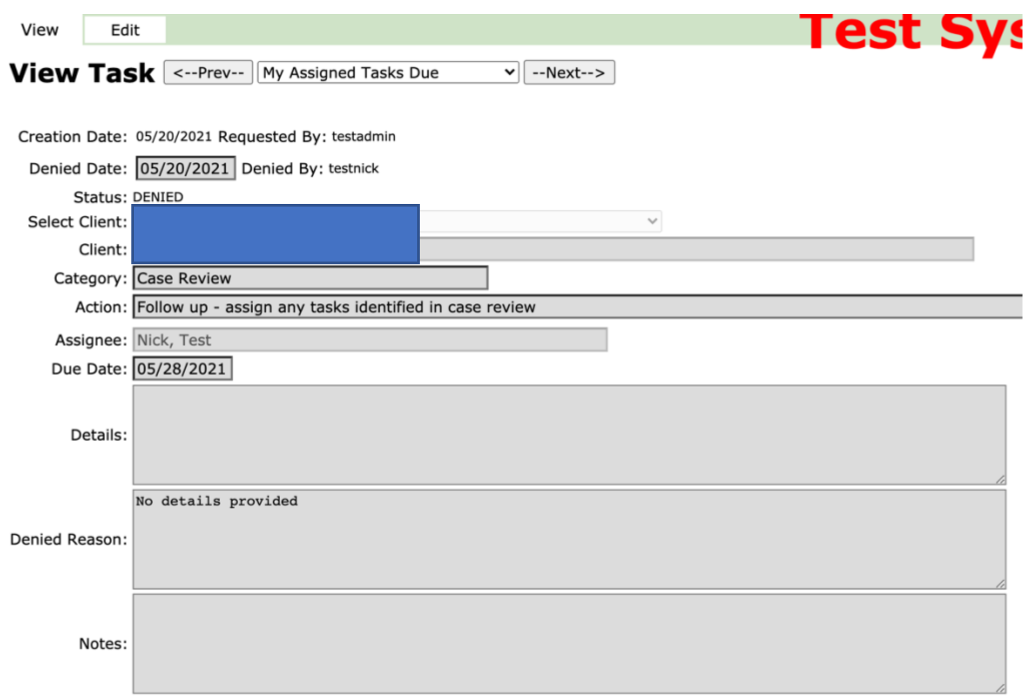


Clicking on the Message will take the user to the Task page

DENIED TASKS

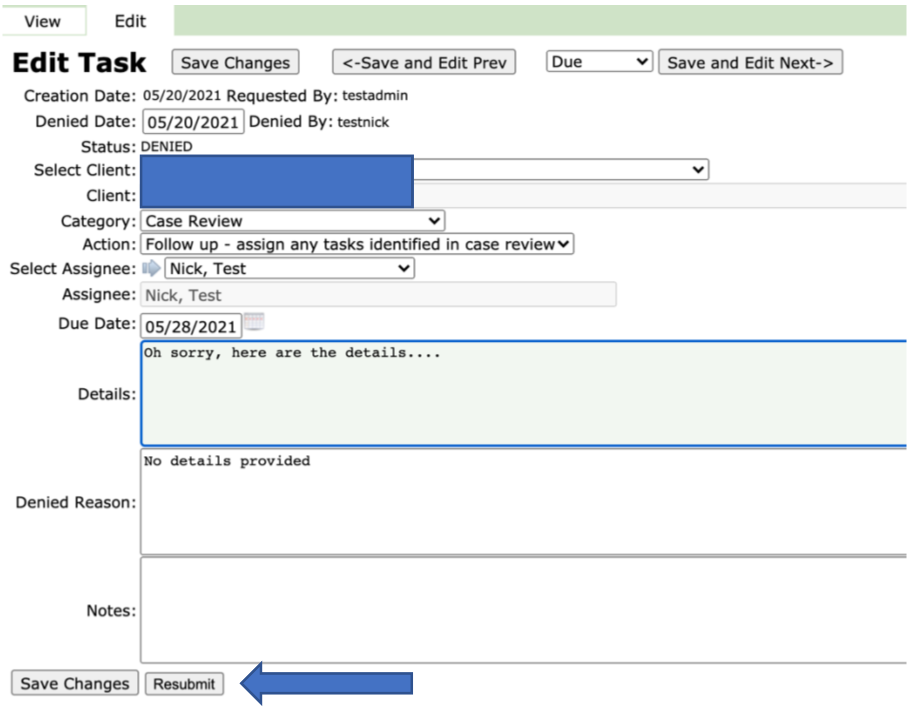
When a Task is “denied”, a reason box will pop up allowing the user to insert a reason



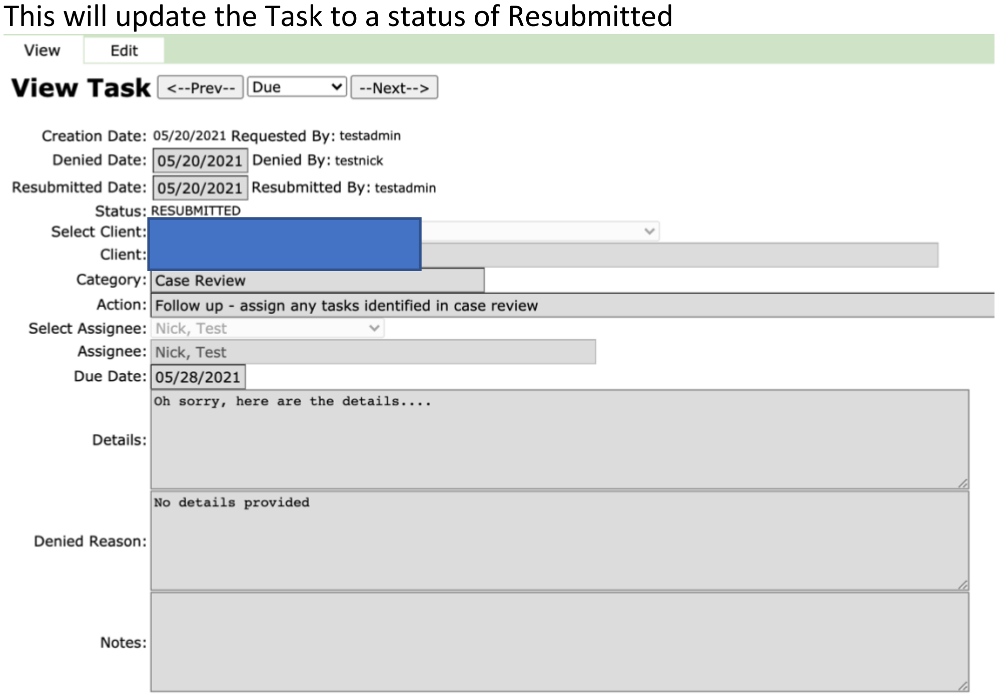


The user who assigned the Task will be notified via a message.

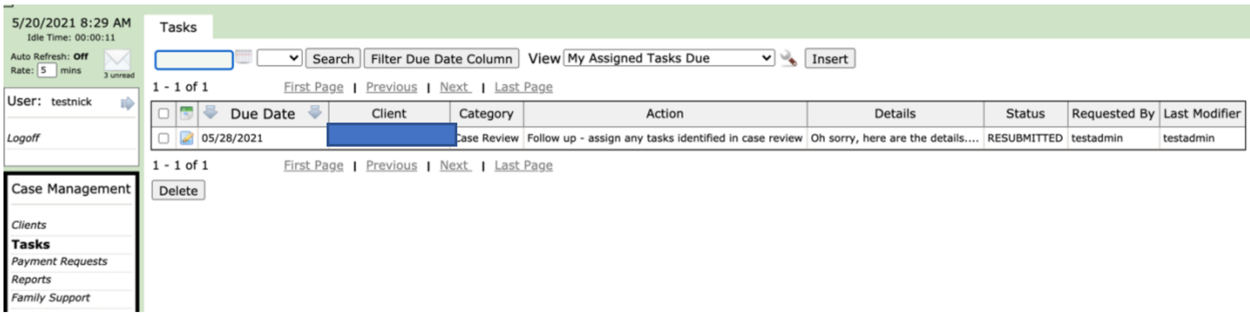
Clicking on the message will open the Task. The user can review the Denied Reasons, edit the page and resubmit.



This will update the Task to a status of Resubmitted



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



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.