

Eligibility Case Review Program

User's Guide

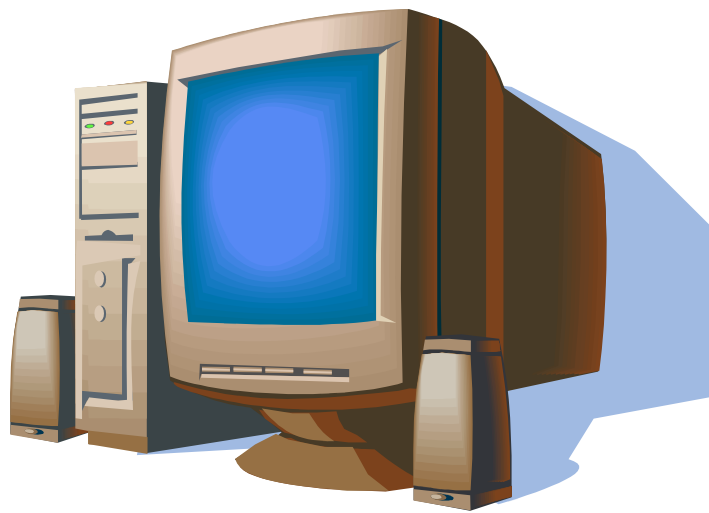


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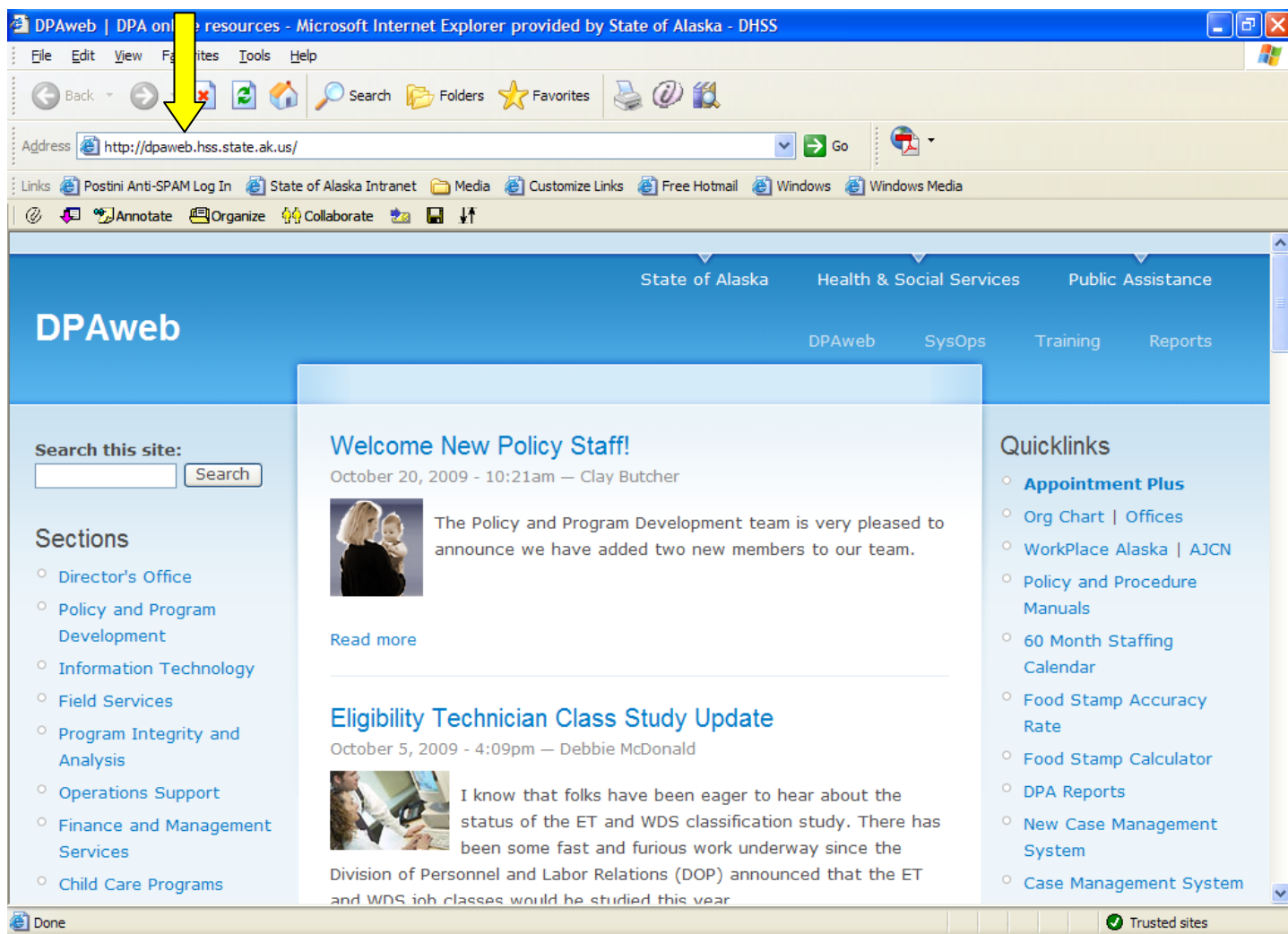
The Case Review System is an online web-based data collection program used to compile the information on reviews conducted by Supervisors and Regional Case Reviewers. This system guide is a reference tool to assist eligibility workers, reviewers and general viewers to navigate through the system.

Accessing the Case Review System

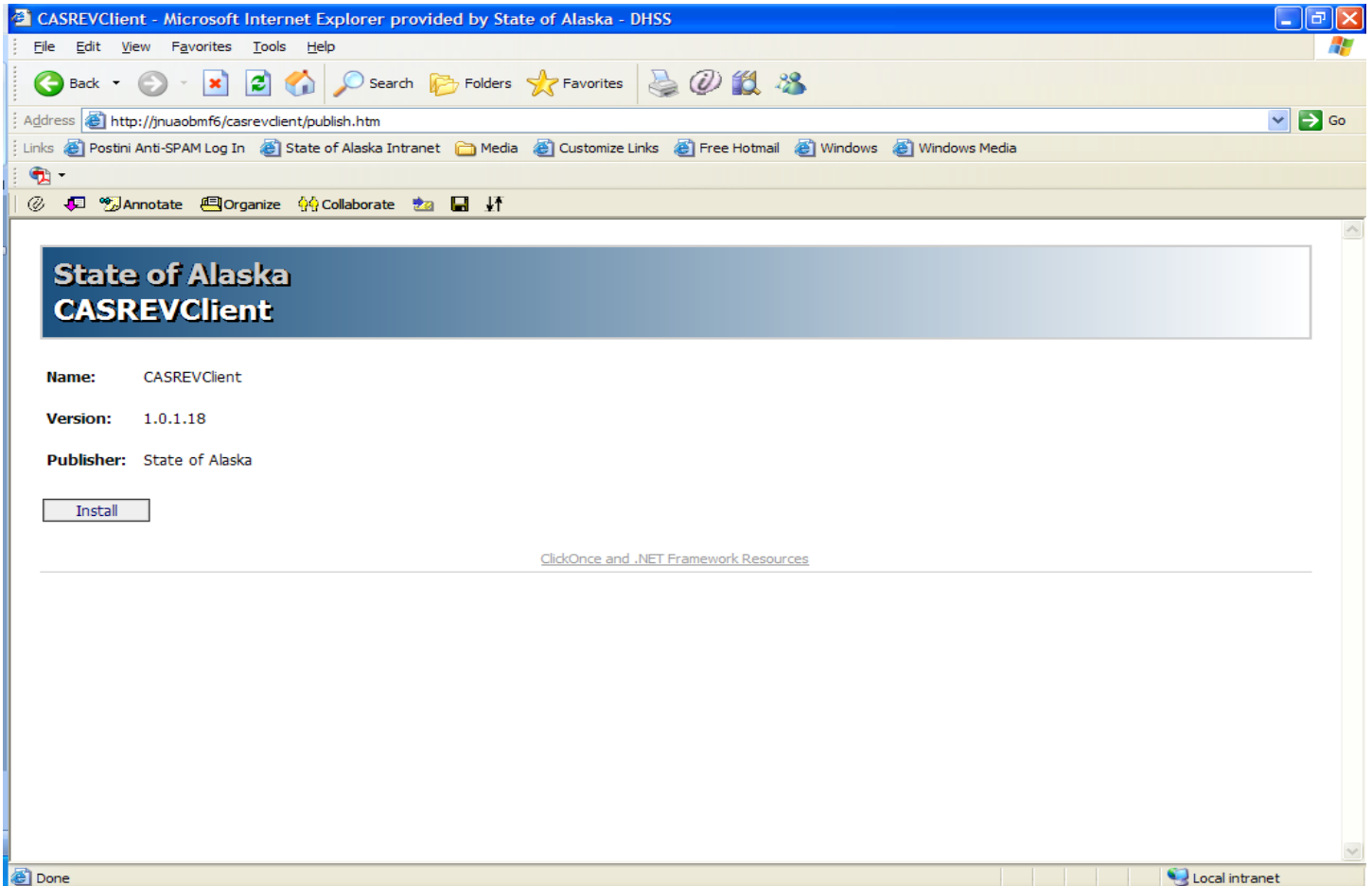
The program will need to be installed on each workers computer. **This will only need to be completed one time.**

Step one: Open an internet browser session (the DPAweb page is the default when you click the web browser icon).

Step two: Type in the following URL in the address block <http://hssjnuintwebp/casereview/> and <enter>.



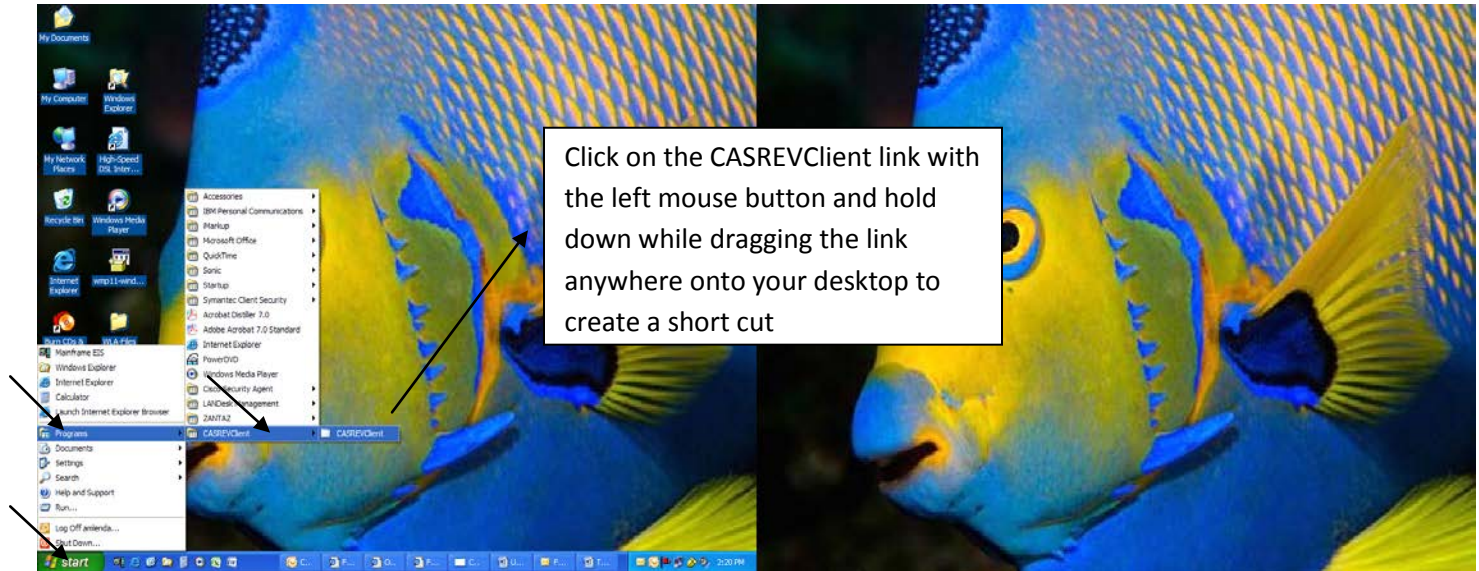
The Case Review install page displays. Click on the install button. The application installs and a shortcut is created in the Start Menu under Programs.



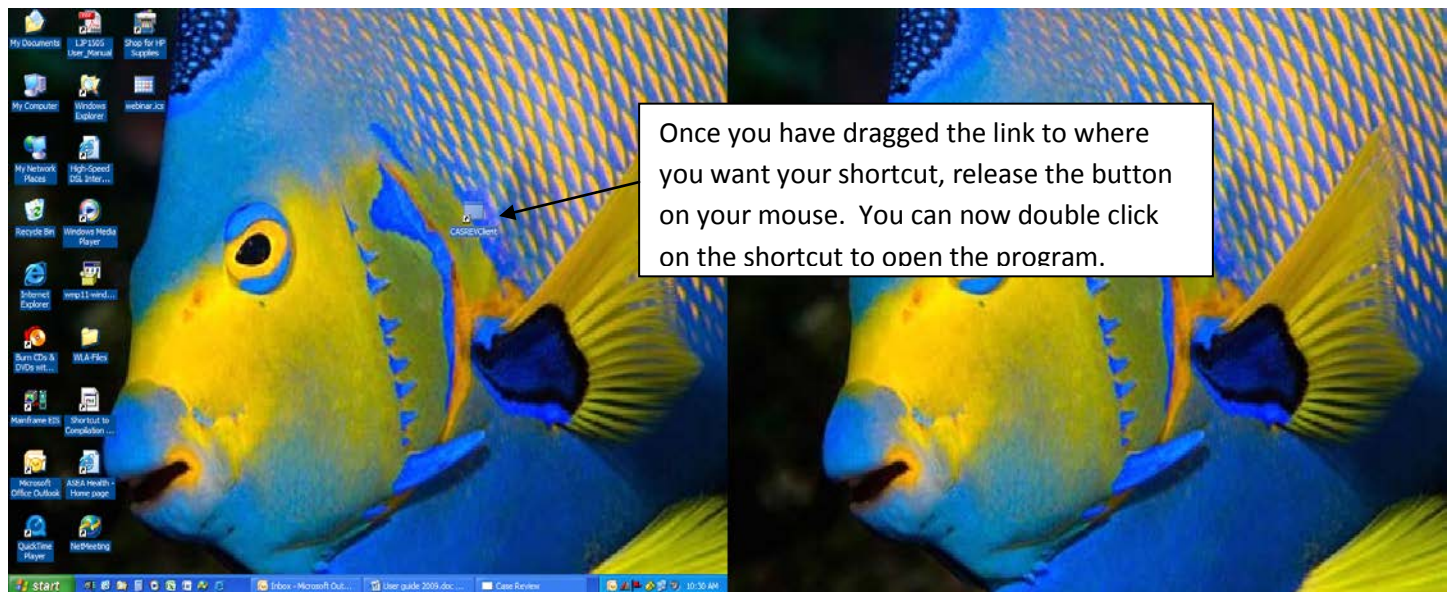
Note: The install takes a few seconds but there is no notification that's it's finished. After clicking on the install button you will see a block stating "Launching Application". After the launch finishes you can close this page.

Once the program has been loaded to your computer you can drag the link anywhere on your desktop to create a shortcut. Click on the start button (1) choose Programs (2) then State of Alaska (3), then CaseRevClient (4). From here you can click and drag the CaseRevClient to your desktop creating an icon for subsequent logins.

Note: If you have created a shortcut icon on your desktop, it will be deleted each time the programmer completes updates so that you are not using an old link. You must do steps 1-4 above again to access the program/re-create the shortcut.

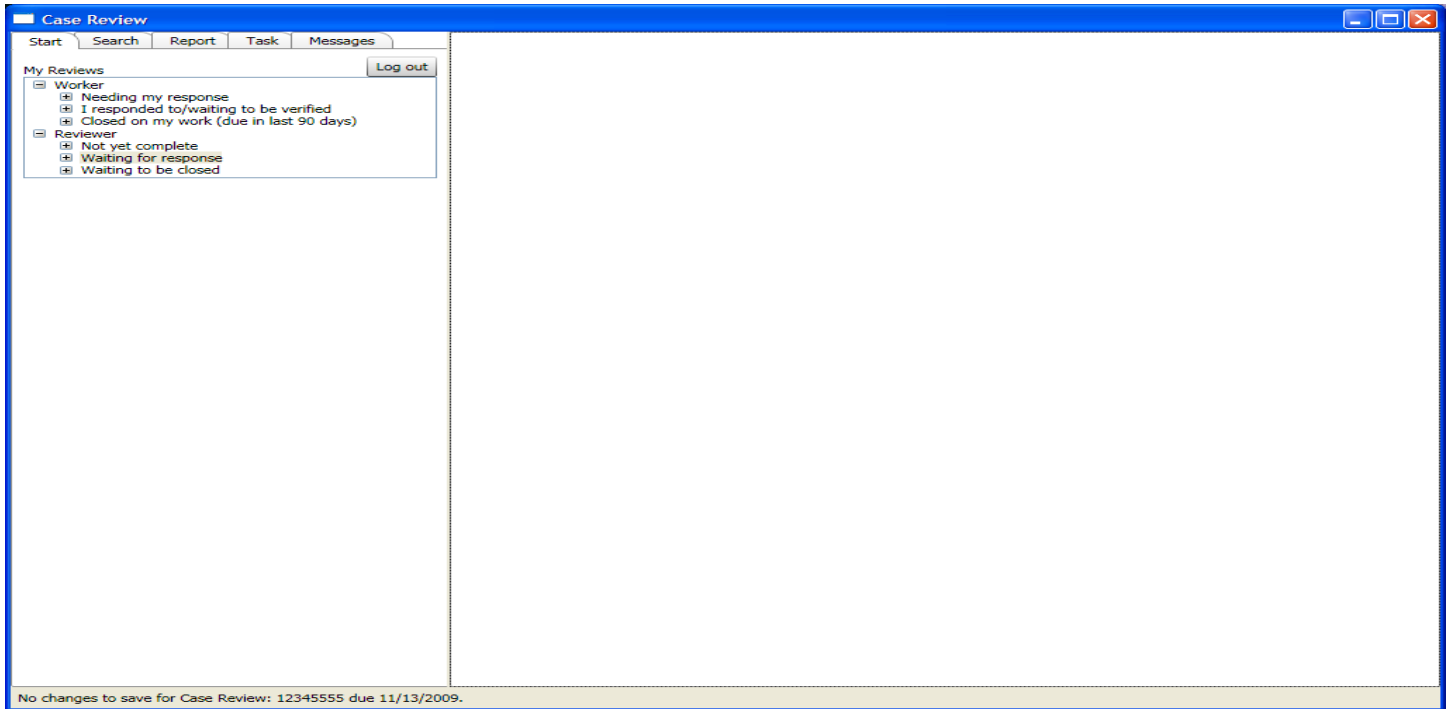


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The review application will open. This may take a minute so wait for it.

When this screen appears, you are in the program.



When you click on the 'Log out' button, the program closes and a Login window appears.

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At this point you can re-enter your domain userID (DHSS\loginID) and computer login/password to open the program again or just close that window by clicking on the red X.



Logging Into the Program/Reporting Problems

You can always use the shortcut you created to log into the program. The login/password is saved in the link and it is the easiest way to access the program once you create it.

Your login/password will always match the one you use to open your computer.

For most DPA employees your domain is DHSS so the login would be DHSS\ (your computer login) and then your computer password. You can find your current login by holding ALT/CTRL/DEL keys on your computer. It will bring up the window that shows your logon information. **Each time you change your computer access password, it automatically changes the password to log into the Case Review Program to match.**

If you try several times to log in and use the incorrect Domain/logon or password, **it will not only lock you out of the program but out of your computer** and you will have to contact Information Technology help desk to reset your password.

Contact the IT helpdesk in Anchorage at 269-3444, in Fairbanks 451-3125, in Juneau 465-8200 or toll free 1-888-484-5763.

If you are able to log into your computer, you will be able to log into the program if you are using the correct login/password. **There is no password to reset** unless you have locked yourself out of your computer.

Do not contact systems operations EIS Helpdesk to reset your Case Review program password. They are not responsible for that program and cannot help you. **You will need to contact IT helpdesk to reset your computer password at the above listed numbers.**

For other program questions contact the Field Services representative at DPAFIELD@ALASKA.GOV. If you have had a name change or your computer login has changed for any reason contact the Field Services representative. They will have to contact a programmer to update the change in the Case Review program.

The capabilities of each user will depend on the profiles (or authority) established within the system. The contents and selection options are also based on user profiles. Consequently, not all users will view the same menu options, or some of the selections may be inoperable. The following is an overview of each type of profile that will be viewed under the start tab:

Worker:

My Reviews

- Worker

+ Needing my response

+ I responded to/waiting to be verified

+ Closed on my work (due last 90 days)

Reviewer:

My Reviews

- Worker

+ Needing my response

+ I responded to/waiting to be verified

+ Closed on my work (due last 90 days)
- Reviewer

+ Not yet complete (reviews that have been started)

+Waiting for response

+Waiting to be closed

Supervisor:

- Worker

+ Needing my response

+ I responded to/waiting to be verified

+ Closed on my work (due last 90 days)
- Reviewer

+ Not yet complete (reviews that have been started)

+Waiting for response

+Waiting to be closed
- Supervisor

+All unassigned

+Assigned to Reviewers I supervise

+Needing a response from Workers I supervise

+Closeable by me

+Closeable by me or someone I supervise

Case Reviewer – Creating a New Review

The reviewer will start at their Search tab. Select 'Case' in the 'Search For' drop down, enter the case number next to the 'Case Number Contains' block and click on the Search button.

Case Review

Start Search Report Task Messages

Search For: Case

Filter By: By Case Info

Case Number: contains 5555555

Last Name: begins with

First Name: begins with

New Search

Case Number	Last Name	First Name
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If the case has previously been created in the program the case information shows up here when the Search button has been selected. The reviewer can then click on the case number and the case information will show to the right along with a history of prior reviews completed on the case. There is also an 'Add Review' button. See below

Case Review: 05601878 due 03/05/2010 deleted successfully.

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The Case Number and Client Name will be prefilled when clicking the 'add review' button

Case Review

Start Search Report Task Messages

Case: 05363762 Mickey

Case Number: 05363762

Client First Name: [Redacted]

Client Last Name: [Redacted]

Add Review

Due Date	Reviewer	Worker	Review State	Error
6/3/2008			Closed	Yes
4/7/2007			Closed	Yes
10/27/2009			Closed	Yes

Case Number: 05363762 | Last Name: Ginn | First Name: Tamara

Case Review: 05601878 due 03/05/2010 deleted successfully.

The reviewer can click on any review Due Date to open a prior review on the case.

Clicking on the 'Add Review' button will open a case review sheet and pre-fill the case information into the form (see below).

View of the new review form with case information pre-filled. You can now complete the form.

The screenshot shows the 'Case Review' application window. On the left, there's a search panel with filters for Case Number, Last Name, and First Name. The main panel is divided into two sections: 'Case Review' and 'State History'. The 'Case Review' section contains fields for Case Number (05363762), Client Name (redacted), Reviewer (Lenda, Aina), Type (redacted), Target (redacted), Worker (redacted), Unit (redacted), Unit Supervisor (redacted), State (Assigned), and Due Date (mm/dd/yyyy). A yellow arrow points to the Case Number field. The 'State History' section shows a table of state changes.

State	Changed By	Changed On
Created	Aina Lenda	3/5/2010 11:08:58 AM
Reviewer changed from none to Aina Lenda	Aina Lenda	3/5/2010 11:08:58 AM
Assigned	Aina Lenda	3/5/2010 11:08:58 AM

Programs to Review:

- ☐ Senior Benefits
- ☐ Adult Public Assistance
- ☐ CAMA
- ☐ Food Stamps
- ☐ General Relief Assistance
- ☐ Interim Assistance
- ☐ Medicaid
- ☐ Temporary Assistance
- ☐ Child Care
- ☐ Heating Assistance

No changes to save for Case Review: 05363762 due 10/27/2009.

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If the case number has never been loaded to the program:

The screenshot shows the 'Case Review' application window. On the left, there's a search panel with filters for Case Number, Last Name, and First Name. The main panel is divided into two sections: 'Case Review' and 'State History'. The 'Case Review' section contains fields for Case Number (redacted), Client First Name (redacted), Client Last Name (redacted), Reviewer (redacted), Type (redacted), Target (redacted), Worker (redacted), Unit (redacted), Unit Supervisor (redacted), State (Assigned), and Due Date (mm/dd/yyyy). A yellow arrow points to the Case Number field. The 'State History' section shows a table of state changes.


State	Changed By	Changed On
Created	Aina Lenda	3/5/2010 11:08:58 AM
Reviewer changed from none to Aina Lenda	Aina Lenda	3/5/2010 11:08:58 AM
Assigned	Aina Lenda	3/5/2010 11:08:58 AM


Programs to Review:

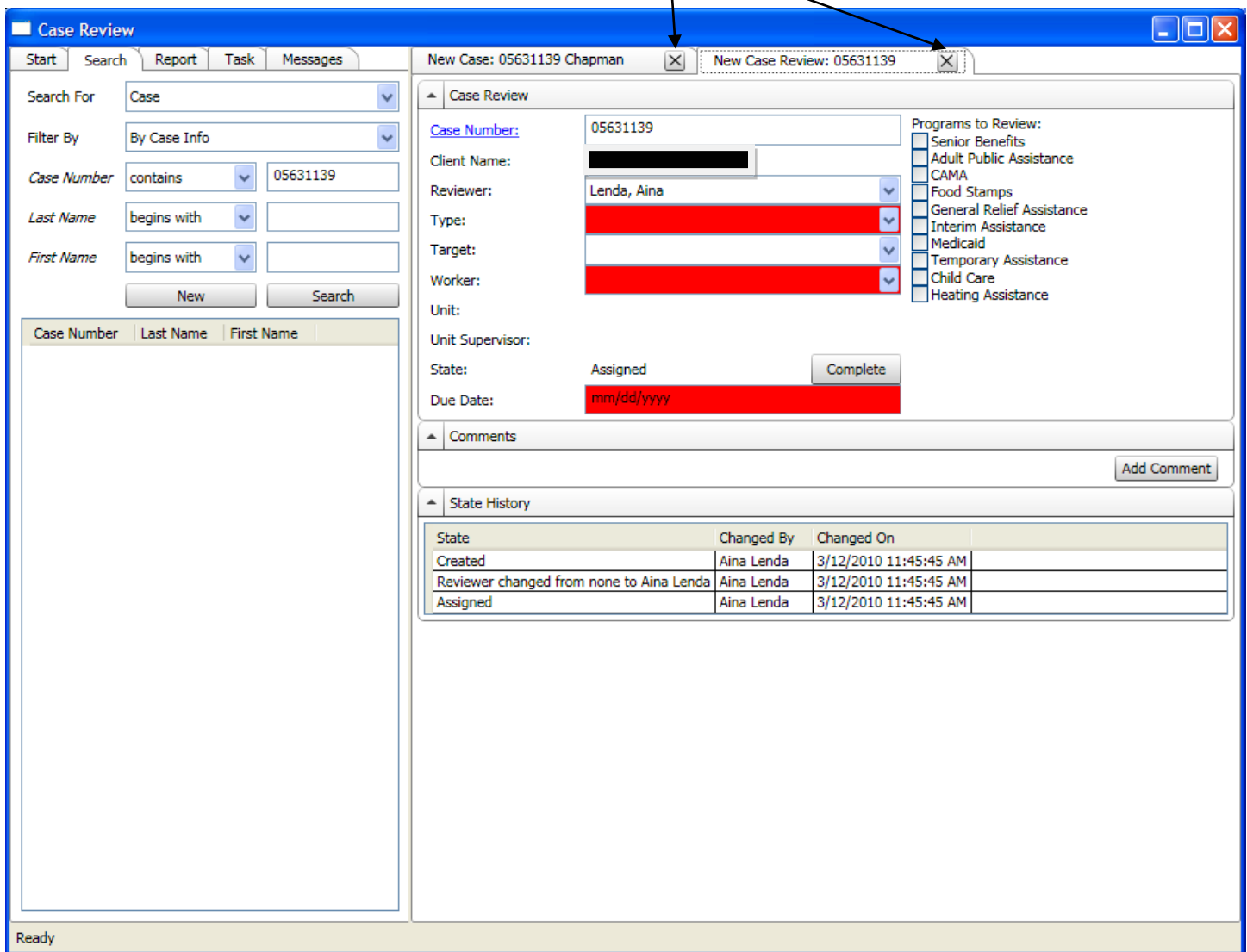
- ☐ Senior Benefits
- ☐ Adult Public Assistance
- ☐ CAMA
- ☐ Food Stamps
- ☐ General Relief Assistance
- ☐ Interim Assistance
- ☐ Medicaid
- ☐ Temporary Assistance
- ☐ Child Care
- ☐ Heating Assistance

Case Review deleted successfully.

This will open up the case review form overlapping the New Case form.

Important Note: Once the reviewer opens the case review window with the 'Add Review' button they will be able to complete the review form. They must save and close both the **case** and **case review** windows by clicking on the  (Save&Close) button after completing the review form.

Save the 'New Case' and 'New Case Review' after completing the case review form by clicking on the Save & Close 



Case Review

Start Search Report Task Messages

Search For: Case

Filter By: By Case Info

Case Number: contains 05631139

Last Name: begins with

First Name: begins with

New Search

Case Number Last Name First Name

New Case: 05631139 Chapman

New Case Review: 05631139

Case Review

Case Number: 05631139

Client Name: [REDACTED]

Reviewer: Lenda, Aina

Type: [REDACTED]

Target: [REDACTED]

Worker: [REDACTED]

Unit: [REDACTED]

Unit Supervisor: [REDACTED]

State: Assigned Complete

Due Date: mm/dd/yyyy

Programs to Review:

- ☐ Senior Benefits
- ☐ Adult Public Assistance
- ☐ CAMA
- ☐ Food Stamps
- ☐ General Relief Assistance
- ☐ Interim Assistance
- ☐ Medicaid
- ☐ Temporary Assistance
- ☐ Child Care
- ☐ Heating Assistance

Comments

Add Comment

State History

State	Changed By	Changed On
Created	Aina Lenda	3/12/2010 11:45:45 AM
Reviewer changed from none to Aina Lenda	Aina Lenda	3/12/2010 11:45:45 AM
Assigned	Aina Lenda	3/12/2010 11:45:45 AM

Ready

A reviewer may also begin a review by going to the Search tab, selecting the 'Search for' Case Review, entering the case number in the 'contains' block and click on the New button. This will bring up the history of reviews completed on that case and open a new case review window. Enter the case number in the appropriate field to start the review.

The screenshot shows the 'Case Review' application with the 'Search' tab selected. On the left, the 'Search For' dropdown is set to 'Case Review'. The 'Filter By' dropdown is set to 'By Case Info'. The 'Search' button is highlighted with a yellow arrow. The 'New' button is also highlighted with a yellow arrow. A text box on the left states: 'If the case has previously been reviewed, a list of the reviews will show up here. You can click on any of the listings to open the review.'

The 'New Case Review' window is open on the right. It contains the following fields:

- Case Number:** A redacted field.
- Client Name:** A redacted field.
- Reviewer:** 'Lenda, Aina'.
- Type:** A redacted field.
- Target:** A redacted field.
- Worker:** A redacted field.
- Unit:** A redacted field.
- Unit Supervisor:** A redacted field.
- State:** 'Assigned'.
- Due Date:** 'mm/dd/yyyy'.

On the right side of the 'New Case Review' window, there is a list of 'Programs to Review' with checkboxes:

- ☐ Senior Benefits
- ☐ Adult Public Assistance
- ☐ CAMA
- ☐ Food Stamps
- ☐ General Relief Assistance
- ☐ Interim Assistance
- ☐ Medicaid
- ☐ Temporary Assistance
- ☐ Child Care
- ☐ Heating Assistance

Below the 'New Case Review' window, there is a 'Comments' section with an 'Add Comment' button and a 'State History' table.

State	Changed By	Changed On
Created	Aina Lenda	3/5/2010 2:40:03 PM
Reviewer changed from none to Aina Lenda	Aina Lenda	3/5/2010 2:40:03 PM
Assigned	Aina Lenda	3/5/2010 2:40:03 PM

At the bottom of the application, a status bar message reads: 'Case Review deleted successfully.'

If that case has not already been created, the program will ask you to create it by clicking yes in the box shown below.

The 'Create Case' dialog box is shown. It has a title bar with 'Create Case' and a close button. The main text reads: 'Do you want to create case: 22334455'. At the bottom, there are two buttons: 'Yes' and 'No'.

Clicking yes in the Create Case window opens this page on top of your open case review page. You will have to enter the client's first and last names. **Use caps for first letters of both names.** Click on the **X** in the New Case tab to save and close the newly created case prior to going back to the New Case Review tab.

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If the tab does not close when you have clicked on the **X** for either a new case or case review an error message block will open up and messages regarding the errors of your actions will be displayed.

The error message block lets you know the save action was not successful with a brief description of the error. You must go back after clicking the OK button to make your corrections. Once you successfully create the case **and have saved it** the New Case window will close and you can proceed with your review.

Clicking on any of the **X**'s in the tabs saves and closes that tab.

Fields highlighted in red must be completed. Select applicable programs for this case review by checking the box in front of the listed programs. As soon as you check a program, the review will open up the appropriate review sections to include the customer action, office response and benefit month blocks.

The Customer Action and Office Response sections must each have one red circle selected. If you are reviewing multiple months, you can click on the Add Benefit button to open additional benefit months for each program.

Case Review

Start Search Report Task Messages

New Case Review Log out

My Reviews

- Worker
 - Need my response
 - I responded to/waiting to be verified
 - Closed on my work (due in last 90 days)
- Reviewer
 - Not yet complete
 - Waiting for response
 - Waiting to be closed

New Case Review: 22334455

Case Review

Case Number: 22334455

Client Name: Client, Susie

Reviewer: Lenda, Aina

Type: [dropdown]

Target: [dropdown]

Worker: [red highlighted]

Unit: [dropdown]

Unit Supervisor: [dropdown]

State: Assigned

Due Date: mm/dd/yyyy

Complete

Adult Public Assistance
CAMA
☒ Food Stamps
☒ General Relief Assistance
☐ Interim Assistance
☐ Medicaid
☐ Temporary Assistance
☐ Child Care
☐ Heating Assistance

Food Stamps Customer Action: ☐ Applied ☐ Changed ☐ Recertified Office Response: ☐ Approved ☐ Denied/Closed

Add Benefit

Benefit Month: mm/yyyy Authorized Amount: 0 Final Amount: 0

Delete Benefit Needs More Info Add Error

General Relief Assistance Customer Action: ☐ Applied ☐ Changed ☐ Recertified Office Response: ☐ Approved ☐ Denied/Closed

Add Benefit

Benefit Month: mm/yyyy Authorized Amount: 0 Final Amount: 0

Delete Benefit Needs More Info Add Error

Comments Add Comment

New Case: 22334455 Client saved successfully.

If a program was selected in error you can delete the benefit and then uncheck the program.

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If the review did not have errors the reviewer completes the benefit month and authorized and final amounts. Once you have completed all the required fields for each month and each program, click the Add Comment button to open up that section. Your review should now look like this.

Case Review

Start Search Report Task Messages

New Case Review Log out

My Reviews

- Worker
 - Need my response
 - I responded to/waiting to be verified
 - Closed on my work (due in last 90 days)
- Reviewer
 - Not yet complete
 - Waiting for response
 - Waiting to be closed

New Case Review: 22334455 due 10/15/2009

Case Review

Case Number: 22334455

Client Name: Client, Susie

Reviewer: Lenda, Aina

Type: Supervisory

Target: [dropdown]

Worker: Coastal Region

Unit: Donovan, Patricia

Unit Supervisor: [dropdown]

State: Assigned

Due Date: 10/15/2009

Complete

Adult Public Assistance
CAMA
☒ Food Stamps
☒ General Relief Assistance
☐ Interim Assistance
☐ Medicaid
☐ Temporary Assistance
☐ Child Care
☐ Heating Assistance

Food Stamps Customer Action: ☐ Applied ☐ Changed ☐ Recertified Office Response: ☐ Approved ☐ Denied/Closed

Add Benefit

Benefit Month: 10/2009 Authorized Amount: 168 Final Amount: 0

Delete Benefit Needs More Info Add Error

General Relief Assistance Customer Action: ☐ Applied ☐ Changed ☐ Recertified Office Response: ☐ Approved ☐ Denied/Closed

Add Benefit

Benefit Month: 10/2009 Authorized Amount: 350 Final Amount: 350

Delete Benefit Needs More Info Add Error

Comments Add Comment

New Case: 22334455 Client saved successfully.

The comments section will open in red and you will be allowed to enter comments for the review. Once your comments have been added, if there are no errors, click on the Complete button (in the above view) to close the review. The State changes **from Assigned to Closed**. The review still needs to be saved.

Case Review

Start Search Report Task Messages

Case: 22334455 Client Case Review: 22334455 due 10/15/2009

Search For: Case

Filter By: By Case Info

Case Number: contains []

Last Name: begins with [] client

First Name: begins with []

New Refresh

Case Number	Last Name	First Name
12345555	Client	Present
22334455	Client	Susie

Case Review

Case Number: 22334455

Client Name: Client, Susie

Reviewer: Lenda, Aina

Type: Supervisory

Target: []

Worker: []

Unit: Coastal Region

Unit Supervisor: Donovan, Patricia

State: Closed

Due Date: 10/15/2009

Food Stamps Customer Action: ☒ Applied Office Response: ☒ Approved ☐ Denied/Closed

Benefit Month: 10/2009 Authorized Amount: []

General Relief Assistance Customer Action: ☒ Approved ☐ Denied/Closed

Benefit Month: 10/2009 Authorized Amount: 350 Final Amount: 350

Comments

New Case Review: 22334455 due 10/15/2009 saved successfully.

Note: You must still **save** the review by clicking on the **Save & Close** button in the Case Review tab.

You can delete a comment if the change has **not** been saved by right clicking your mouse and selecting 'undo changes'

If there was an error or you checked the 'Needs More Info' block the state will change to needs response when you click on the complete tab. The review will also show in your Waiting for response queue and the workers Waiting for response queue.

Case Review

Start Search Report Task Messages

Case Review: 12345678 due 09/21/2009 Case Review: 12345678 due 09/21/2009

New Case Review Log out

My Reviews

- Worker
 - Need my response
 - I responded to/waiting to be verified
 - Closed on my work (due in last 90 days)
- Reviewer
 - Not yet complete
 - Waiting for response
 - 12345555 10/15/2009
 - 12345678 09/21/2009
 - 12345678 09/28/2009
 - 12345678 10/09/2009
 - 33331234 10/16/2009
 - 33331234 10/20/2009
 - 73852612 10/15/2009
 - Waiting to be closed

Case Review

Case Number: 12345678

Client Name: Mouse, Mickey

Reviewer: Lenda, Aina

Type: Supervisory

Target: Unearned Income

Worker: []

Unit: Coastal Region

Unit Supervisor: Donovan, Patricia

State: Needs Response

Due Date: 09/21/2009

Food Stamps Customer Action: ☒ Applied ☐ Changed ☐ Recertified Office Response: ☒ Approved ☐ Denied/Closed

Benefit Month: 09/2009 Authorized Amount: 100 Final Amount: 0

Primary Error Type Error Factor Error Reason

335 Unemployment Compe Failed to Act on Info Detail Overlooked

Comments

Comment Left By: Aina Lenda Comment Left On: 9/21/2009

TESTING

State History

New Case Review: 12345678 due 09/21/2009 saved successfully.

Once the worker responds to the review, you will have the option to either reject the response which will put it back in 'Needs Response' state or you can close the review. If the review needs to be put back in 'Needs Response' status, add a comment explaining the additional action that the worker needs to take. Then click the 'Reject' button to send the review back to the worker. If the workers response is correct you can click the 'Close' button. **Always remember to click on the X to save and close the review after your action.**

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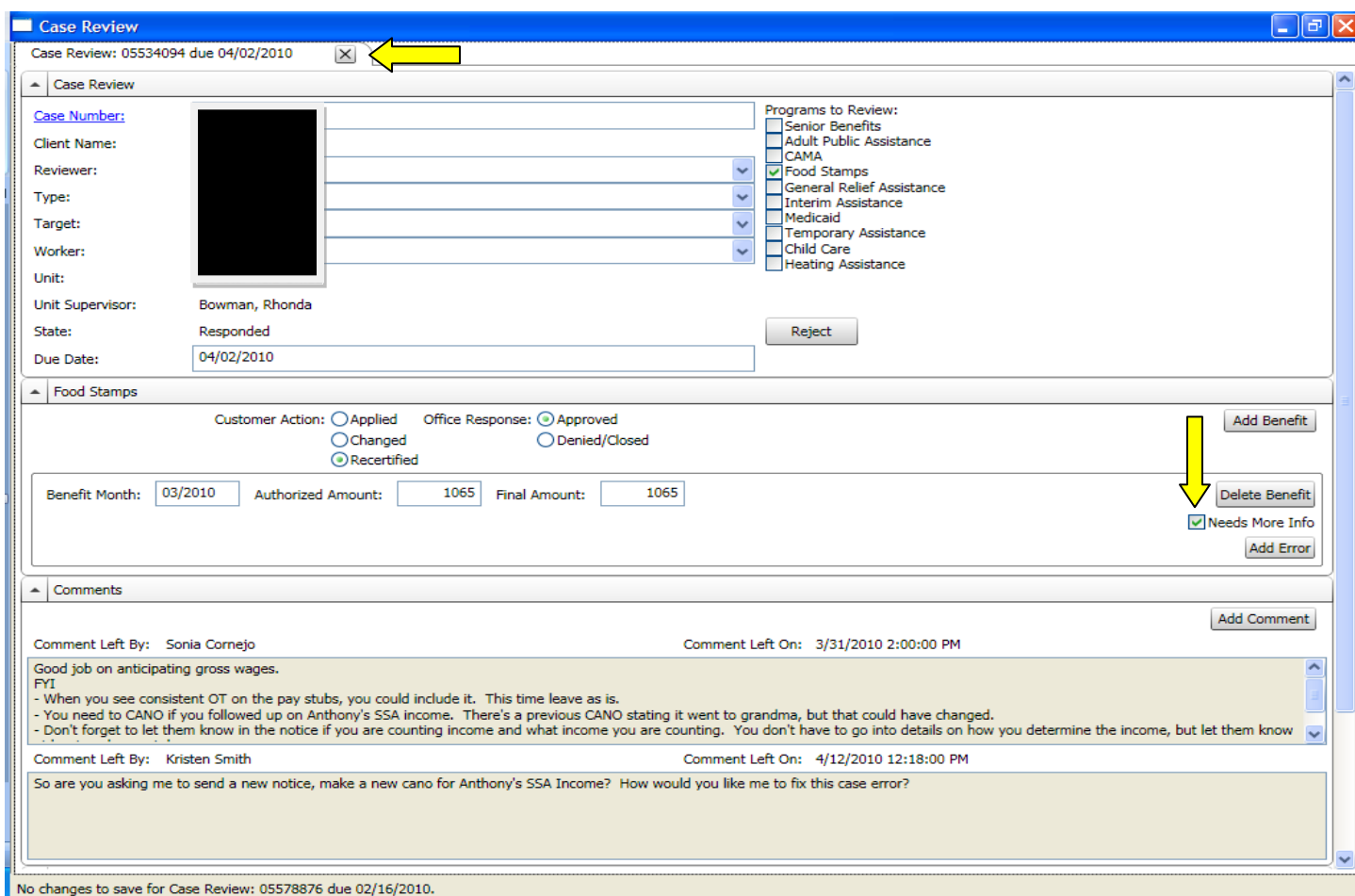
Note: There is a hierarchy for persons authorized to close a review. The reviewer can always close a review after the worker responds. In addition, the worker's supervisor can close a review. If neither is available the supervisor's supervisor can close the review etc. For example, the regional reviewer in the Gambell office creates a review on a Gambell worker. The regional reviewer can close the review or the workers supervisor can close the review. If neither one of them are available, the Gambell site manager can close the review.

If the worker moved from one site to another, the review stays in the hierarchy of the unit it was created in. If the review was created at the Gambell site and it was not closed out prior to the worker changing sites, the reviewer or leadership at the Gambell site will have to close the review. In this case, the review will show up in reports under the worker no matter what unit they now belong to but will remain in the Gambell unit report since that was where the worker was when the review was created.

Closing Reviews with 'Needs More Info' Checked

When the worker responds to a review that had the box 'needs more info' checked, the reviewer must uncheck that block before the review can be closed. There will not be any options but the 'reject' button until this is done.

If the worker has responded and satisfied all the questions the reviewer had, all (you may need to scroll down the review to see them all) 'needs more info' blocks must be un-checked. The reviewer will need to **save and close the review and then reopen it for the 'Close' button to appear.**



Case Review

Case Review: 05534094 due 04/02/2010

Case Review

Case Number: [Redacted]
Client Name: [Redacted]
Reviewer: [Redacted]
Type: [Redacted]
Target: [Redacted]
Worker: [Redacted]
Unit: [Redacted]
Unit Supervisor: Bowman, Rhonda
State: Responded
Due Date: 04/02/2010

Programs to Review:
☐ Senior Benefits
☐ Adult Public Assistance
☐ CAMA
☒ Food Stamps
☐ General Relief Assistance
☐ Interim Assistance
☐ Medicaid
☐ Temporary Assistance
☐ Child Care
☐ Heating Assistance

Reject

Food Stamps

Customer Action: ☐ Applied ☐ Changed ☒ Recertified
Office Response: ☒ Approved ☐ Denied/Closed

Benefit Month: 03/2010 Authorized Amount: 1065 Final Amount: 1065


Add Benefit
Delete Benefit
☒ Needs More Info
Add Error

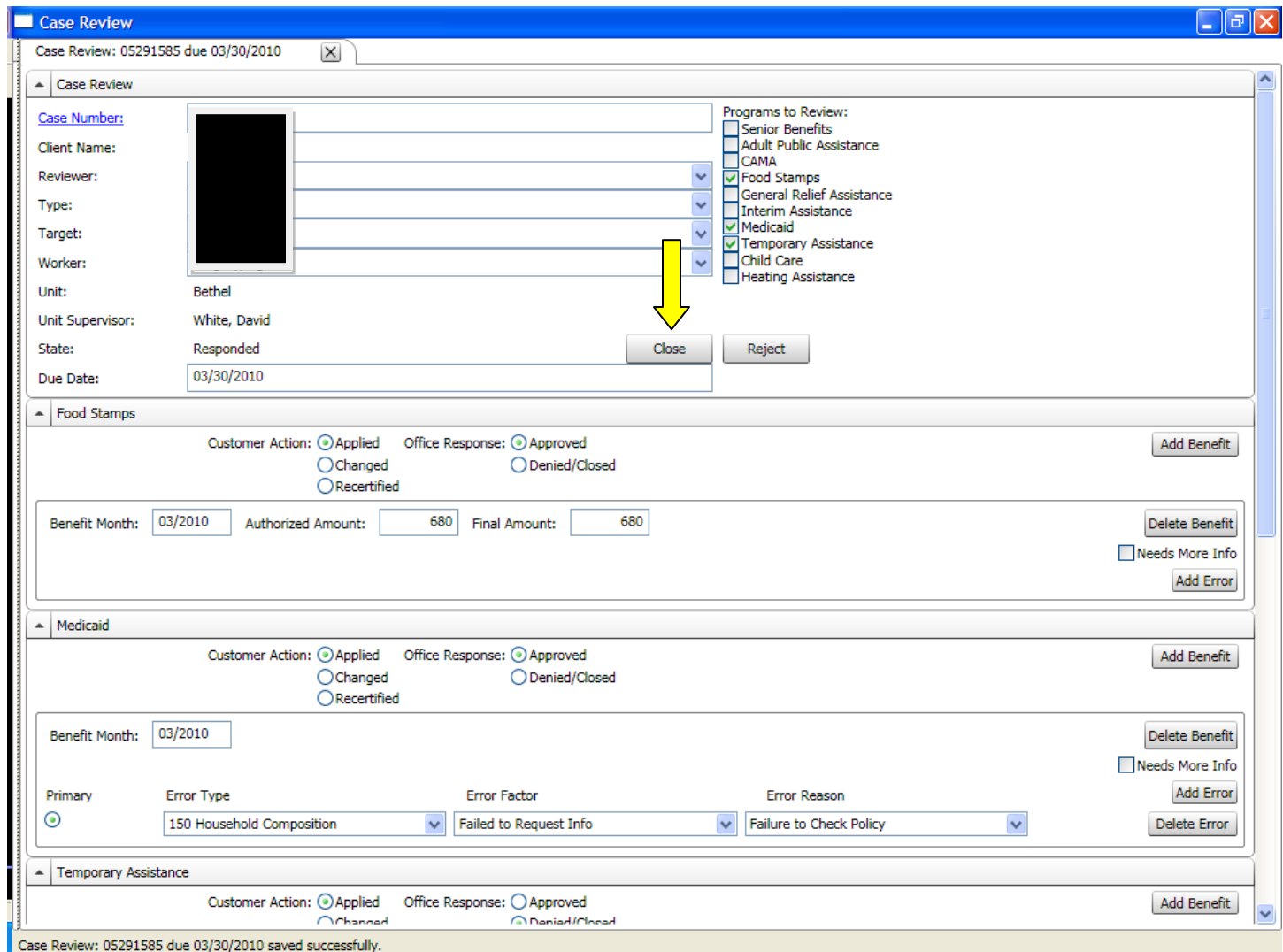
Comments

Comment Left By: Sonia Cornejo Comment Left On: 3/31/2010 2:00:00 PM
Good job on anticipating gross wages. FYI
- When you see consistent OT on the pay stubs, you could include it. This time leave as is.
- You need to CANO if you followed up on Anthony's SSA income. There's a previous CANO stating it went to grandma, but that could have changed.
- Don't forget to let them know in the notice if you are counting income and what income you are counting. You don't have to go into details on how you determine the income, but let them know

Comment Left By: Kristen Smith Comment Left On: 4/12/2010 12:18:00 PM
So are you asking me to send a new notice, make a new cano for Anthony's SSA Income? How would you like me to fix this case error?

No changes to save for Case Review: 05578876 due 02/16/2010.

At this time the reviewer can update error information that needs to be added to the review. Click on the 'Close' button to change the status and then save the review (click on the Save & Close )

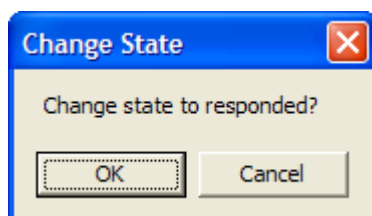


Primary	Error Type	Error Factor	Error Reason
<input checked="" type="radio"/>	150 Household Composition	Failed to Request Info	Failure to Check Policy

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Closing a Review When the Worker is no Longer with DPA

When a worker leaves DPA without responding to the reviews in their 'Needing my response' queue the supervisory staff in that workers hierarchy (reviewer, immediate supervisor, site manager, regional manager) will need to make sure the case is correct and then close out the review. Make sure to uncheck any 'Needs More Info' blocks first. To change the review from 'needs response' status the reviewer/supervisor will need to click on the 'Add comment' button. The program will open a 'Change State' pop up (shown below) asking whether the user wants to change the status to 'responded'. Select OK. This will open up the 'Close' button. The supervisor must then enter a comment (i.e. closing review) **before closing the review**. Once the comment has been entered, click on the 'Close' button and save the review. **The program will not allow you to close the review without adding a comment.**



Re-Opening a Review to Add Additional/Change Information

When a review is in Needs Response or Closed status, a reviewer may re-open the review to add additional information with the 'Reopen' button. Clicking on the button changes the review status back to Assigned. The reviewer can make their changes and click on the 'Complete' button again to either close the review or send it back to the worker in 'Needs Response' Status whichever is appropriate.

Case Review

New Case Review: 05585122 due 05/18/2010

Case Review

Case Number:

05585122

Client Name:

Reviewer:

Type:

Target:

Worker:

Unit:

Coastal Field Office

Unit Supervisor:

Bowman, Rhonda

State:

Closed

Due Date:

05/18/2010

Programs to Review:

☐ Senior Benefits

☐ Adult Public Assistance

☐ CAMA

☒ Food Stamps

☐ General Relief Assistance

☐ Interim Assistance

☐ Medicaid

☐ Temporary Assistance

☐ Child Care

☐ Heating Assistance

Reopen

Food Stamps

Customer Action:

☒ Applied

☐ Changed

☐ Recertified

Office Response:

☒ Approved

☐ Denied/Closed

Add Benefit

Benefit Month:

05/2010

Authorized Amount:

239

Final Amount:

239

Delete Benefit

☐ Needs More Info

Add Error

Comments

Add Comment

State History

State	Changed By	Changed On
Created	Aina Lenda	5/18/2010 12:54:49 PM
Assigned	Aina Lenda	5/18/2010 12:54:49 PM
Reviewer changed from none to Aina Lenda	Aina Lenda	5/18/2010 12:54:49 PM
Worker changed from none to Sonia Cornejo	Aina Lenda	5/18/2010 12:55:21 PM
Closed	Aina Lenda	5/18/2010 12:55:55 PM

No changes to save for Case Review: 05585122 due 01/25/2010.

Printing/Deleting a Review

To print or delete a review you must right click anywhere in the review form. This will display a box (example below) that gives you the option to print or delete. Left click on the appropriate action.

Save
Undo Changes
Delete
Close
Print Review

Clicking on the Print Review selecting will format a report shown below. Click on the print icon to proceed with printing.

Case Review

Case Review: 05298538 due 05/11/2010 | Report: Case Review

Worker: [] Case Number: 05298538
Unit: Mat-Su Regional Support - 1 Client Name: []
Supervisor: Armstrong, Mark Type: Regional Review
Reviewer: Hambrick, Mike Target:
Due Date: 5/11/2010 State: Closed

Programs	Benefit Month	Authorized	Reviewed
Food Stamps	05/2010	635	127
	Error Type	Reason	Factor
	335 Unemployment Compensation	Incorrect Procedure	Detail Overlooked
	06/2010	635	127
	Error Type	Reason	Factor
	335 Unemployment Compensation	Incorrect Procedure	Detail Overlooked

Comments	Left By	Left On
1. REBUDGET 5/10 & 6/10 W/CORRECT UIB ISSUED REPORT OF DETERMINATION FOR OVERPMT 5/10 - copy in file SENT NOTICE	Carlock	5/7/2010
(1) In 0510 the \$1694.20 UIB was coded as UB EM instead, which stopped counting it as income for FS. It was coded correctly in 0410 when the Med app was worked.	Hambrick	5/7/2010

Report Execution: 6/29/2010 10:07:25 AM By : Lenda, Aina

No changes to save for Case Review: 05298538 due 05/11/2010. DHSS\AMLenda v1.0.1.19

Note: If you want to save paper you can right click on the review report above instead of clicking on the print icon. This will give you a different print option. All the information will be there without the separation bars and most reviews will print on one page with this option.

You will **not be able to delete a review until you have removed benefits** for all programs listed in the review. If there are benefits recorded in the review, you will get an error message stating you must delete benefits. If there were any errors noted in the review you must first delete the error. Then click on the Delete Benefit button for all programs that were reviewed and then right click to get the options above. You may now delete the review.

Undo Changes

The print/delete pop-up also has an 'Undo Changes' function. If the reviewer adds comments or makes other changes to a review and then wants to delete the current change and revert the review back to the status it was in when first opened in the current session, the reviewer can click on the undo changes option (shown previous page) **prior to saving** the review. The program will delete any changes made in the current session. For example, the reviewer clicked the add comment button and a new comment section is open showing in red but the reviewer decides they have no comment to add. Clicking on the undo changes option will delete the new comment window **and any other changes** made during the current session to this review.


Reviewers - Following up on Reviews in Your Queue

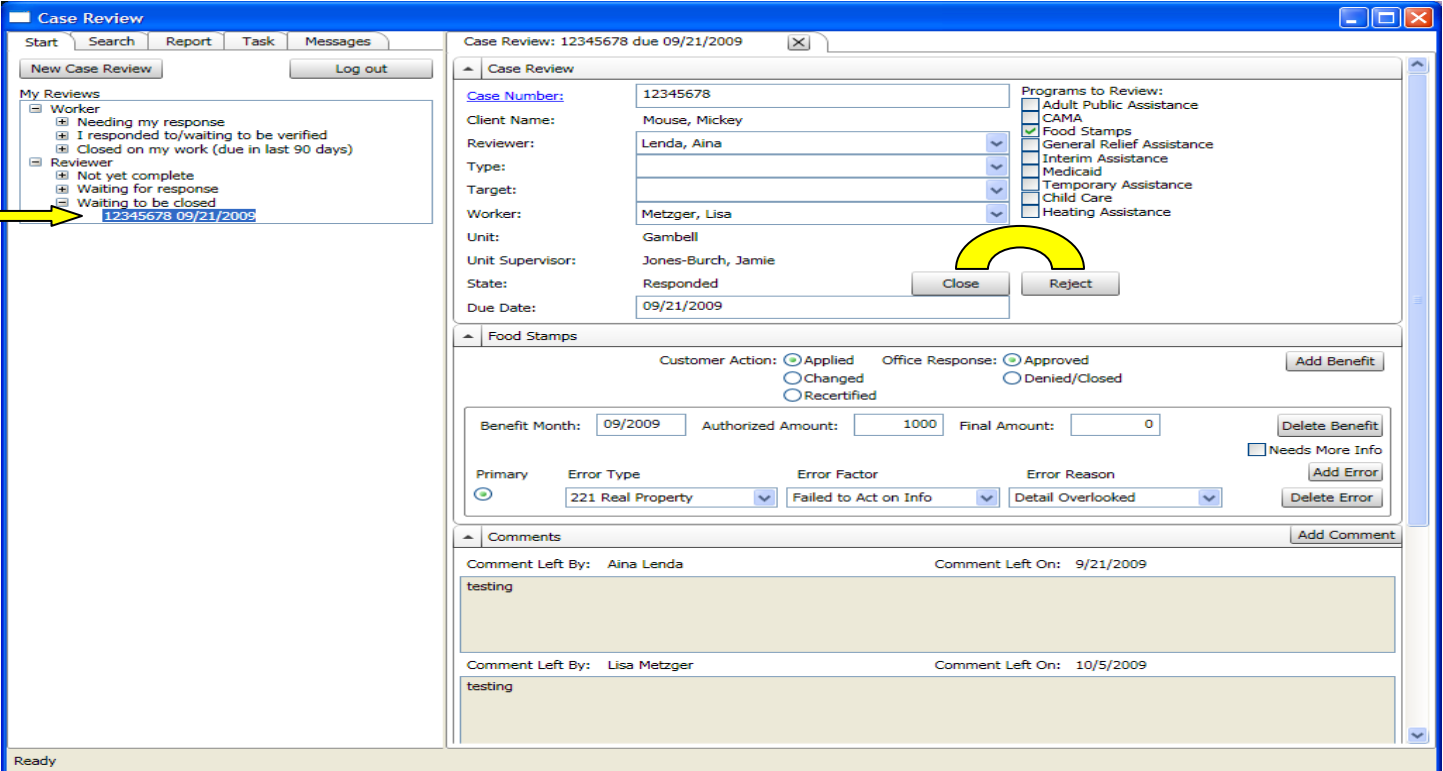
From your Start tab, there is a box My Reviews with both Worker and Reviewer sections. The worker section will be reviews completed on your work and has three statuses the reviews can be in:


- Needing my response-an open review requiring your action
- I responded to/waiting to be verified-reviews you responded to but have not been closed
- Closed on my work (due last 90 days)-a list of all closed reviews completed in the last 90 days.

The Reviewer section lists reviews you created and also has three possible statuses:

- Not complete-cases started but not sent to worker
- Waiting for response-reviews sent to worker but needing a response
- Waiting to be closed-worker has responded and needs follow-up

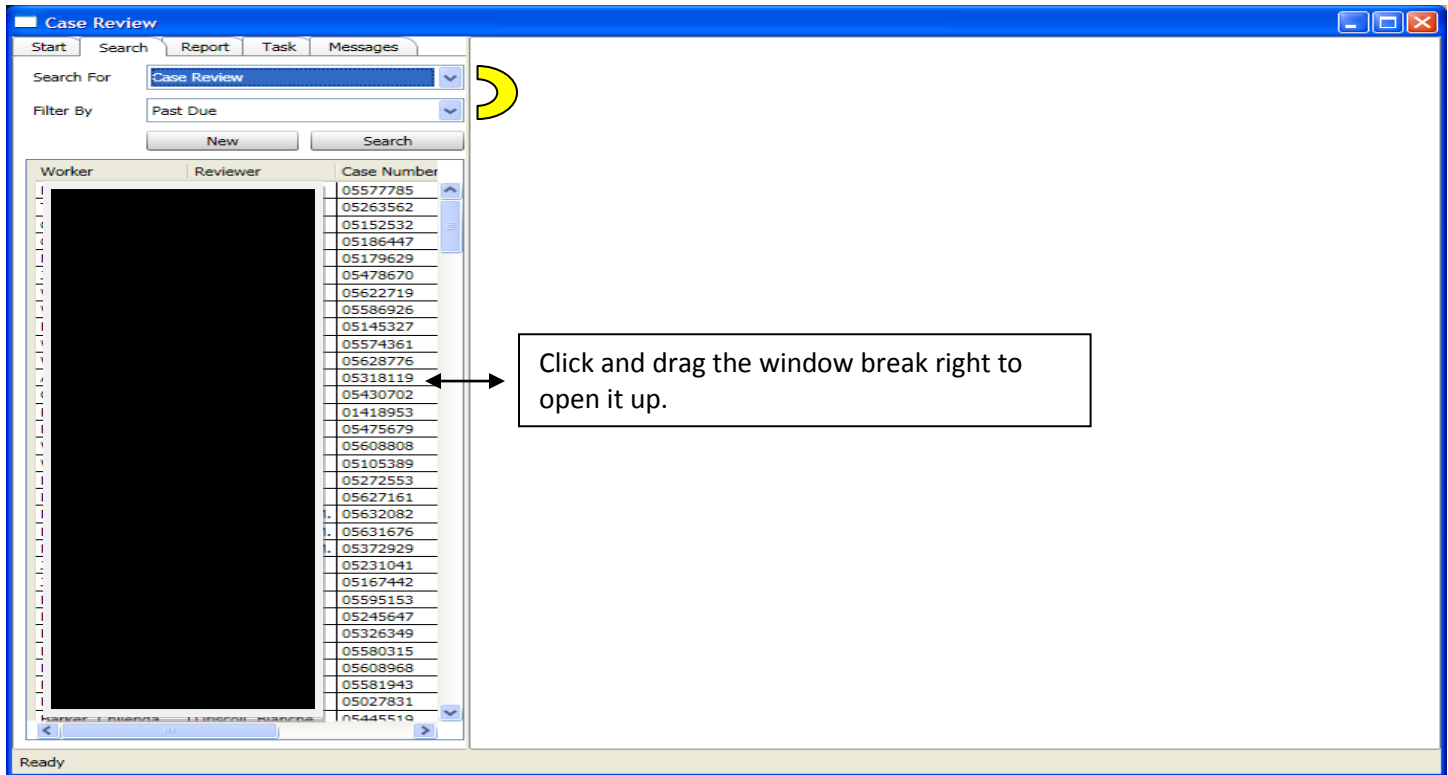
Clicking on any of the blocks with a  sign will open the drop down for that status and changes the sign to a minus when the drop down is open. The case numbers in that status and the date due will be displayed. To open the review, simply click on the case number.



From here you can close the review or select 'Reject' sending it back to the worker. Be sure to add a comment explaining the additional corrective action needed before you 'Reject' the review. Save & Close 

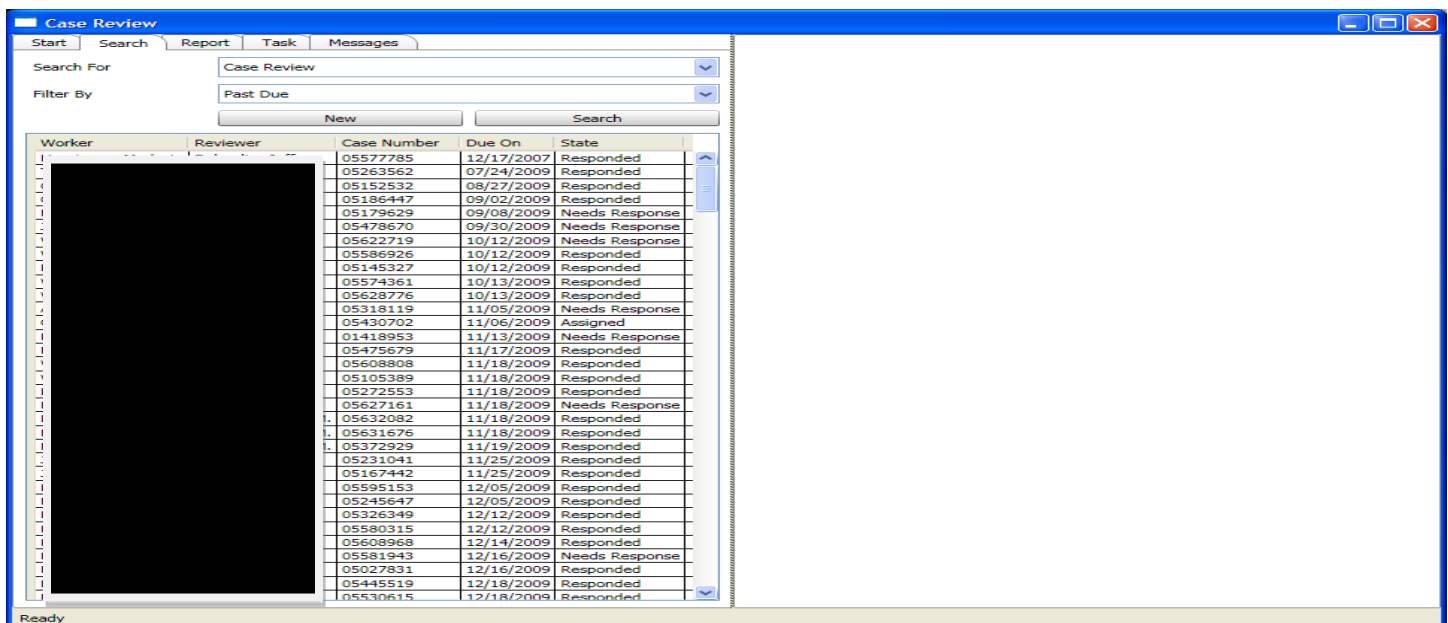
Following Up On Past-Due Reviews

Authorized persons can follow-up on all open reviews. From the 'Search' tab select Case Review in the Search For drop-down and Past Due in the Filter by drop-down. This will open a list of all open reviews statewide.



Click and drag the window break right to open it up.

The opened window will display the Worker, Reviewer, Case Number, Due on, and State fields shown below. Clicking on any of those headings will allow you to change the sort option of the list. For example, click on the Worker title to sort by worker, the Reviewer title to sort by reviewer etc.



Worker	Reviewer	Case Number	Due On	State
		05577785	12/17/2007	Responded
		05263562	07/24/2009	Responded
		05152532	08/27/2009	Responded
		05186447	09/02/2009	Responded
		05179629	09/08/2009	Needs Response
		05478670	09/30/2009	Needs Response
		05622719	10/12/2009	Needs Response
		05586926	10/12/2009	Responded
		05145327	10/12/2009	Responded
		05574361	10/13/2009	Responded
		05628776	10/13/2009	Responded
		05318119	11/05/2009	Needs Response
		05430702	11/06/2009	Assigned
		01418953	11/13/2009	Needs Response
		05475679	11/17/2009	Responded
		05608808	11/18/2009	Responded
		05105389	11/18/2009	Responded
		05272553	11/18/2009	Responded
		05627161	11/18/2009	Needs Response
		05632082	11/18/2009	Responded
		05631676	11/18/2009	Responded
		05372929	11/19/2009	Responded
		05231041	11/25/2009	Responded
		05167442	11/25/2009	Responded
		05595153	12/05/2009	Responded
		05245647	12/05/2009	Responded
		05326349	12/12/2009	Responded
		05580315	12/12/2009	Responded
		05608968	12/14/2009	Responded
		05581943	12/16/2009	Needs Response
		05027831	12/16/2009	Responded
		05445519	12/18/2009	Responded
		05530615	12/18/2009	Responded

Viewing Reviews in Closed Status

Reviewers can look at reviews that are in closed status by going to the Search tab.

- In the Search For drop down select Case Review
- In the Filter By drop down select By Employee

You can now choose to look at reviews completed on a worker or completed by the reviewer.

- To look at reviews completed on a worker/reviewer scroll the appropriate drop down to find the person's name and select by clicking on the name
- Then select the date that you want to look at reviews from. Once you select a date and search, it will pull up all reviews from the selected date to current. For example, if I input 01/01/2010 and search it will pull up all closed reviews for the worker/reviewer that had due dates from Jan 1-current date.
- If you do not input a date it will display all reviews completed on the worker/reviewer. This list could be very long. The Due Date selection allows you to narrow the list.

The list will display the case number, the due date, case name, reviewer name and workers name. You can sort by any of the categories by clicking on the titles. For example if I want to sort by worker to see the reviews I have done on them recently I click on 'Worker Name'

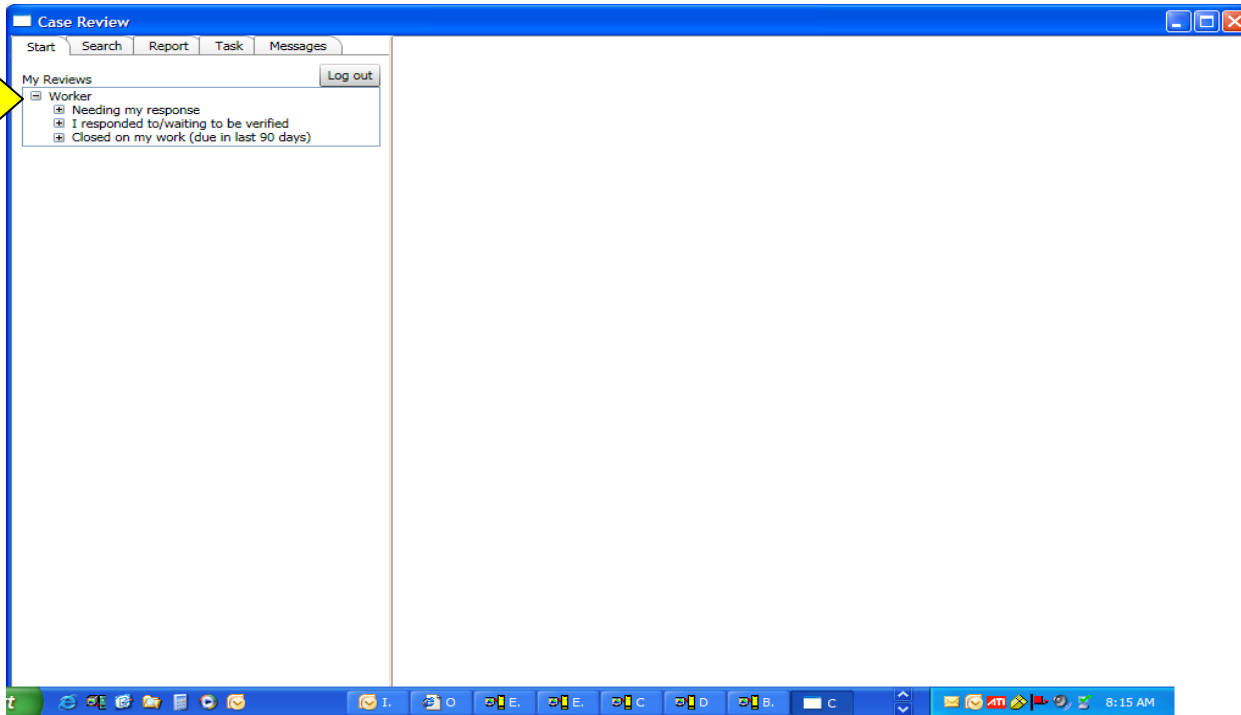
The screenshot shows the 'Case Review' application window. The 'Search' tab is active. The 'Search For' dropdown is set to 'Case Review'. The 'Filter By' dropdown is set to 'By Employee'. The 'Worker Name' dropdown is set to '='. The 'Reviewer Name' dropdown is set to 'Lenda, Aina'. The 'Due Date' dropdown is set to '>=' and the date '01/01/2010' is entered. The 'Search' button is visible. Below the filters is a table of reviews. The table has columns: Case Number, Due On, Case Name, Reviewer Name, and Worker Name. The 'Worker Name' column is highlighted, indicating it is the current sort option. A callout box points to the 'Worker Name' column header with the text: 'Click on the category title to change the sort option. Current view is sorted by due date but you can sort by any of the categories.'


Case Number	Due On	Case Name	Reviewer Name	Worker Name
05078598	06/11/2010		Lenda	Dudley
05107502	06/04/2010		Lenda	Driscoll
05129810	06/03/2010		Lenda	Driscoll
05134344	06/09/2010		Lenda	Moore
05135903	06/01/2010		Lenda	Bertrand
05191841	04/21/2010		Lenda	Pirtz
05205627	05/26/2010		Lenda	Driscoll
05209379	06/01/2010		Lenda	Bertrand
05215616	06/04/2010		Lenda	Driscoll
05282125	05/24/2010		Lenda	Driscoll
05352187	06/03/2010		Lenda	West
05358523	06/11/2010		Lenda	Dudley
05360172	06/09/2010		Lenda	Dash
05386563	06/20/2010		Lenda	Moore
05388808	06/21/2010		Lenda	Moore
05403478	06/04/2010		Lenda	Driscoll
05450033	06/16/2010		Lenda	Kelly
05454017	02/07/2010		Lenda	Glaudo
05458505	06/16/2010		Lenda	Atonio
05473326	06/09/2010		Lenda	Moore
05498317	06/16/2010		Lenda	Dash
05500166	06/16/2010		Lenda	Atonio
05527573	06/01/2010		Lenda	Driscoll
05534170	06/01/2010		Lenda	Bertrand
05540173	06/18/2010		Lenda	Kelly
05545019	06/21/2010		Lenda	Moore
05548012	06/04/2010		Lenda	Driscoll
05585631	06/16/2010		Lenda	Atonio
05586587	06/03/2010		Lenda	Driscoll

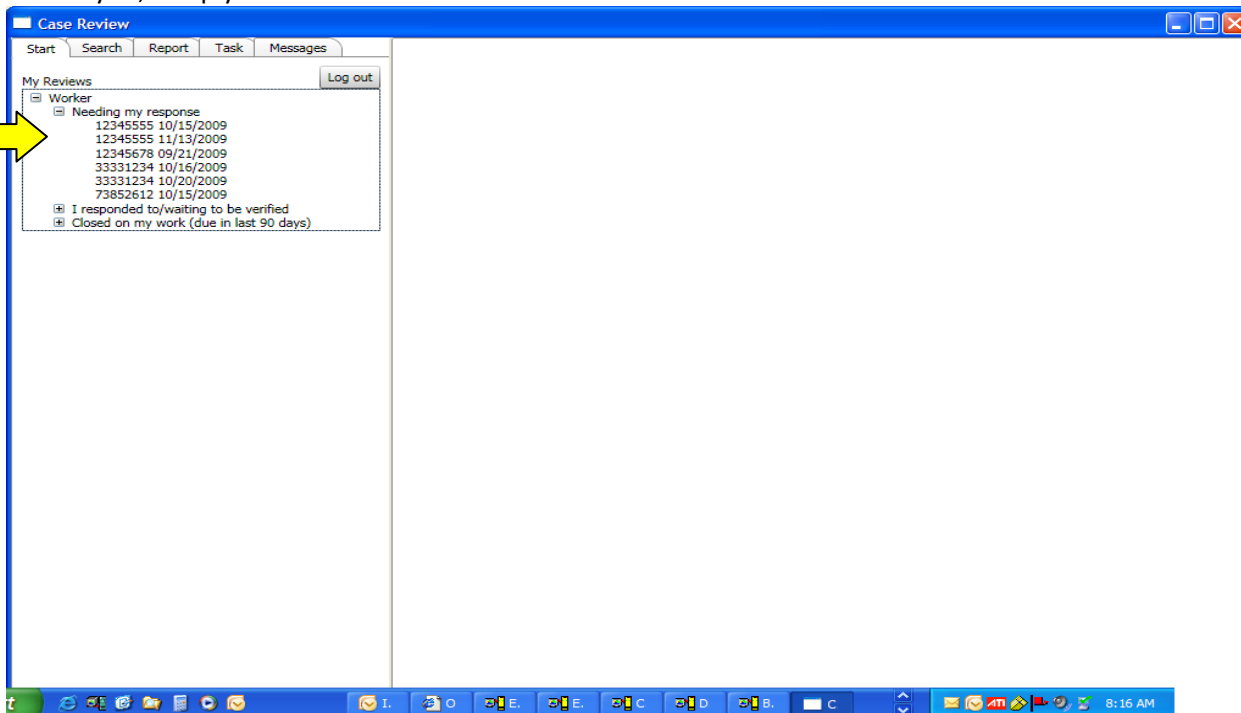
Worker – Following Up on Your Reviews

From your Start tab, there is a box My Reviews with a Worker section which will list reviews completed on your work. The reviews can be in three statuses:

- Needing my response-an open case requiring your action
- I responded to/waiting to be verified-reviews you responded to but have not been closed
- Closed on my work (due last 90 days)-a list of all closed reviews completed in the last 90 days



Clicking on any of the blocks with a  sign will open the drop down for reviews in that status and changes the sign to a minus when the category is open. The case numbers in that status and the **date due** will be displayed. To open the review you, simply click on the case number.



It may take a few seconds for the review to open up and display to the right. The review status will be 'Needs Response'.

The screenshot shows the 'Case Review' application window. On the left, a sidebar titled 'My Reviews' lists several cases under the 'Worker' category, with '12345555 11/13/2009' selected. The main area displays the details for Case Number 12345555. The 'Case Review' section shows the client name as 'Lenda, Aina', the reviewer as 'Lenda, Aina', and the status as 'Needs Response', which is highlighted by a yellow arrow. Below this, the 'Food Stamps' section shows 'Customer Action' as 'Applied' and 'Office Response' as 'Approved'. The 'Medicaid' section also shows 'Customer Action' as 'Applied' and 'Office Response' as 'Approved'. The 'Temporary Assistance' section is partially visible at the bottom.

Go to the 'Add Comment' button and click on it. Depending on how many programs were reviewed, you may have to scroll down the review to see the 'Add comment' button.


This screenshot shows the same 'Case Review' application window, but scrolled down to the 'Comments' section. The 'Add Comment' button is highlighted by a yellow arrow. The 'Comments' section shows a comment left by 'Aina Lenda' on 11/4/2009. The 'State History' section at the bottom shows a table of state changes.

State	Changed By	Changed On
Created	Aina Lenda	11/4/2009 10:17:00 AM
Reviewer changed from none to Aina Lenda	Aina Lenda	11/4/2009 10:17:00 AM

This will open up a red comment section where you can type in your response.

The screenshot shows the 'Case Review' application window. The left sidebar lists 'My Reviews' under the 'Worker' category, with a 'Log out' button. The main area displays 'Case Review: 12345555 due 11/13/2009'. The 'Temporary Assistance' section shows 'Benefit Month: 11/2009', 'Authorized Amount: 300', and 'Final Amount: 290'. Below this, the 'Comments' section is active, showing a comment by 'Aina Lenda' dated '11/4/2009' with the text 'testing'. A new comment is being added by 'I will fix this' on '11/23/2009'. A yellow arrow points to the 'Add Comment' button. The 'State History' table at the bottom shows the state changes.

State	Changed By	Changed On
Created	Aina Lenda	11/4/2009 10:17:00 AM
Reviewer changed from none to Aina Lenda	Aina Lenda	11/4/2009 10:17:00 AM
Assigned	Aina Lenda	11/4/2009 10:17:00 AM

As soon as you start typing, the review State changes to Responded status and sends the review back to the reviewer in their 'Waiting to be closed' queue after you save the response by clicking on the Save & Close . You will be allowed to open multiple reviews over each other. Be sure to Save & Close all reviews before logging out of the program.

The screenshot shows the 'Case Review' application window. The left sidebar is the same. The main area displays 'Case Review: 12345555 due 11/13/2009'. The 'Case Review' section shows 'Case Number: 12345555', 'Client Name: Client, Present', 'Reviewer: Lenda, Aina', 'Type: Supervisory', 'Target: Earned Income', 'Worker: [redacted]', 'Unit: Coastal Region', 'Unit Supervisor: Donovan, Patricia', 'State: Responded', and 'Due Date: 11/13/2009'. A yellow arrow points to the 'Responded' state. The 'Food Stamps' section shows 'Benefit Month: 11/2009', 'Authorized Amount: 100', and 'Final Amount: 100'. The 'Medicaid' section shows 'Benefit Month: 11/2009'.

The reviewer (or supervisor etc) will then be required to follow-up on your response. If the case is correct and complete they will close the review and it will move to your 'Closed on my work (due last ninety days)' queue. If the person doing the follow-up on your response sees other action needs to be taken, they will put the review back into your 'Needing my response' queue.

Workers must monitor their 'Needing my response' queue frequently so that reviews can be responded to by the due date.

Administrators-Adding/Changing/Disabling a Worker

To add a new worker to the program, the administrator will start at their 'Search' tab. Select the 'User' option in the 'Search For' block and click on the 'New' button to open the 'New Case Review User' window.

Case Review

Start Search Report Task Messages

Search For: User

Filter By: All Users

New Refresh

Domain	Logon
dhss	amlenda
dhss	bedriscoll
dhss	cagtarap
dhss	fhoman
dhss	fjschroeter
dhss	jcparent
DHSS	kjkoffard
dhss	kmshindle
DHSS	Immetzger
DHSS	mhambrick
dhss	mmaneng
DHSS	rkreher
DHSS	slpulczinski
dpa	cmoore
DPA	JJohnson
dpa	jones-burch
dpa	Imaiquis
DPA	PMDONOVAN
dpa	rbowman
dpa	scomejo
hss	CaseReviewAdmin
hss	ejstokes
hss	jcparent
hss	jssimmons
hss	rlmigdal
hss	tjlebert

New Case Review User

User

Domain: [Redacted]
Logon: [Redacted]
Name: [Redacted]
Mail: [Redacted]
Unit: [Redacted]
Supervised By: [Redacted]
Security Group: [Redacted]

Roles:
☐ Is Worker
☐ Is Reviewer
☐ Is Unit Supervisor
☐ Is Disabled

Object Permissions

	View	Create	Change	Delete
Case	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Security Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Worker Case Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Report Permissions

	View
Error Summary	<input type="checkbox"/>
Twelve Month Summary	<input type="checkbox"/>
Unit Summary	<input type="checkbox"/>

Ready

The 'Domain' will be DHSS for all DPA employees. The administrator will also need to know the workers computer login. It must match the login the worker uses to open their computer. For most workers this will be first/middle initial and last name. For example: MMMouse. The administrator should ask the worker to do an alt/ctrl/del function on their computer to see their current login. The administrator will then select the correct unit to assign the worker to from the drop down list.

The administrator will also be required to assign the worker appropriate permissions in the program according to the individuals position from the 'Security Group' block (see next page). For an ET I/II the 'Worker' drop down will be selected. Once the administrator clicks on the appropriate drop down, the program will select the correct 'Object Permissions' for the added worker. For an ET I/II 'Worker Case Review' View/Create/Change blocks will be checked. Then check the Role. A worker can be assigned as a worker, a reviewer or both.

Note: ET I/II's will only have the Worker role checked. If they are authorized to complete peer reviews you can select Peer Reviewers from the Security Group drop down.

Case Review

Start Search Report Task Messages

Search For: User

Filter By: All Users

New Refresh

Domain	Logon
dhss	amlenda
dhss	bedriscoll
dhss	cagtarap
dhss	fhoman
dhss	fjschroeter
dhss	jcparent
DHSS	kjkoffard
dhss	kmshindle
DHSS	Immetzger
DHSS	mhambrick
dhss	mmanneng
DHSS	rkraher
DHSS	slpulczinski
dpa	cmoore
DPA	JJohnson
dpa	JJones-burch
dpa	Jmalquis
DPA	PMDONOVAN
dpa	rbowman
dpa	scornejo
hss	CaseReviewAdmin
hss	ejstokes
hss	jcparent
hss	jssimmons
hss	rlmigdall
hss	tjlebert

New Case Review User

Is Disabled ☐

User

Domain: DHSS

Logon: DLWhite

Name:

Mail:

Unit: Coastal Region

Supervised By: Patricia Donovan

Security Group: Worker

Roles:

☒ Is Worker

☐ Is Reviewer

☐ Is Unit Supervisor

Object Permissions

	View	Create	Change	Delete
Case	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Security Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Worker Case Review	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Report Permissions


Error Summary ☐ View

Twelve Month Summary ☐

Unit Summary ☐

Worker Summary ☒

Object permissions will automatically be checked according to the security group selected

The 'Worker' security group allows the worker to complete peer reviews but **will not** allow them to see statistics on other workers. If the administrator uses the correct login, when they save the new worker by clicking on the  in the tab, the program will automatically fill in the 'Name' and 'Mail' blocks of the new user screen and add the individuals name to the user list.

Case Review

Start Search Report Task Messages

Search For: User

Filter By: Active Users

Logon: begins with

First Name: begins with

Last Name: begins with

New Search

Domain	Logon	First	Last
dhss	acgregory	Agnes	Gregory
dhss	acrice	Alan	Rice
dhss	adoscar	Angela	Oscar
dhss	ahorn	Antoinette	Horn
dhss	akholtan	Amanda	Holtan
dhss	almcvay	April	McVay
dhss	alprado	Alma	Prado
dhss	amherzner	Allison	Herzner
dhss	amlazatin	Analin	Lazatin
dhss	amlenda	Aina	Lenda
dhss	amlund	Ashley	Lund
dhss	ammicde	Angela	Micde
dhss	amphillips	Arlene	Phillips
dhss	amwilliams	Amy	Williams
dhss	anelson1	Amy	Nelson
dhss	apjohnson1	Annette	Johnson
dhss	bahollywood	Barbara	Hollywood
dhss	bedriscoll	Blanche	Driscoll
dhss	bkdonoehoe	Brian	Donohoe
dhss	bmaiquis	Lillibeth	Maquis
dhss	bmflaming	Brandi	Fleming
dhss	bmlightner	Bradley	Lightner
dhss	brmacon	Billy	Macon
dhss	brose	Bob	Rose
dhss	bstohl-reiland	Beth	Stohl-Reiland
dhss	cabarker	Chilenda	Barker
dhss	cachandler	Cheryl	Chandler
DHSS	cackerson	Carol	Ackerson
dhss	cafield	Carol	Field

Case Review User: Agnes Gregory

Is Disabled ☐

User

Domain: dhss

Logon: acgregory

Name: Agnes Gregory

Mail: agnes.gregory@alaska.gov

Unit: Bethel

Supervised By: David White

Security Group: Worker

Roles:

☒ Is Worker

☐ Is Reviewer

☐ Is Unit Supervisor

Object Permissions

	View	Create	Change	Delete
Case	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Security Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Worker Case Review	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Report Permissions

Error Summary ☐ View


Twelve Month Summary ☐

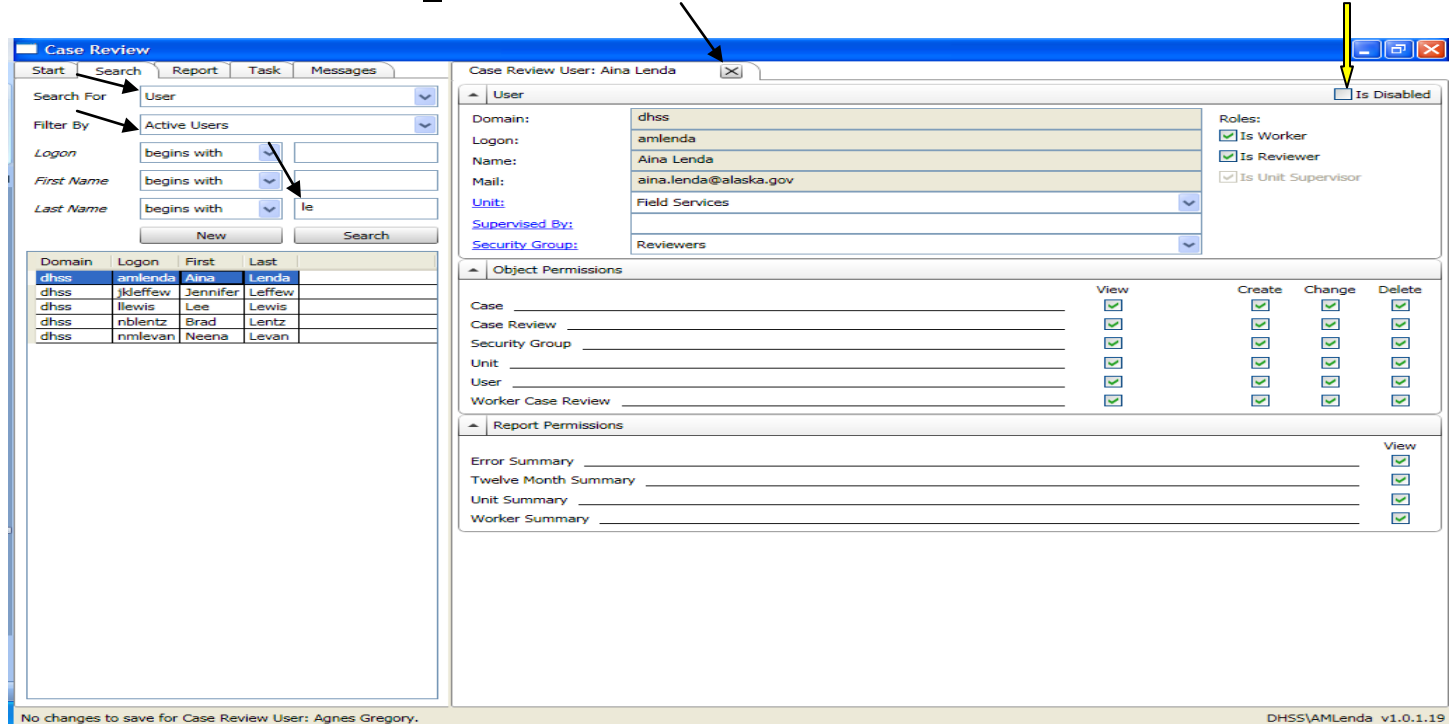
Unit Summary ☐

Worker Summary ☒

Ready

DHSS\AMLenda v1.0.1.19

When a worker is no longer assigned to DPA, the administrator edits the workers profile and checks the 'Is Disabled' block. On the Search tab Search for User. You will filter by 'active user'. Enter the first letter of the workers last name that you want to de-activate in the 'Begins with' block and hit the search button. Click on the Title (First, Last) to sort the list by name. Click on the workers name to open their profile. You could also edit their unit, role, and security group from here. You must click on the  to save the change.



Case Review

Start Search Report Task Messages

Search For: User

Filter By: Active Users

Logon: begins with

First Name: begins with

Last Name: begins with le

New Search

Domain	Logon	First	Last
dhss	amlenda	Aina	Lenda
dhss	jleffew	Jennifer	Leffew
dhss	llewis	Lee	Lewis
dhss	nblentz	Brad	Lentz
dhss	nmlevan	Neena	Levan

Case Review User: Aina Lenda

User

Domain: dhss

Logon: amlenda

Name: Aina Lenda

Mail: aina.lenda@alaska.gov

Unit: Field Services

Supervised By:

Security Group: Reviewers

Roles:

- ☒ Is Worker
- ☒ Is Reviewer
- ☐ Is Unit Supervisor
- ☐ Is Disabled

Object Permissions

	View	Create	Change	Delete
Case	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Case Review	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Security Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Unit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Worker Case Review	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

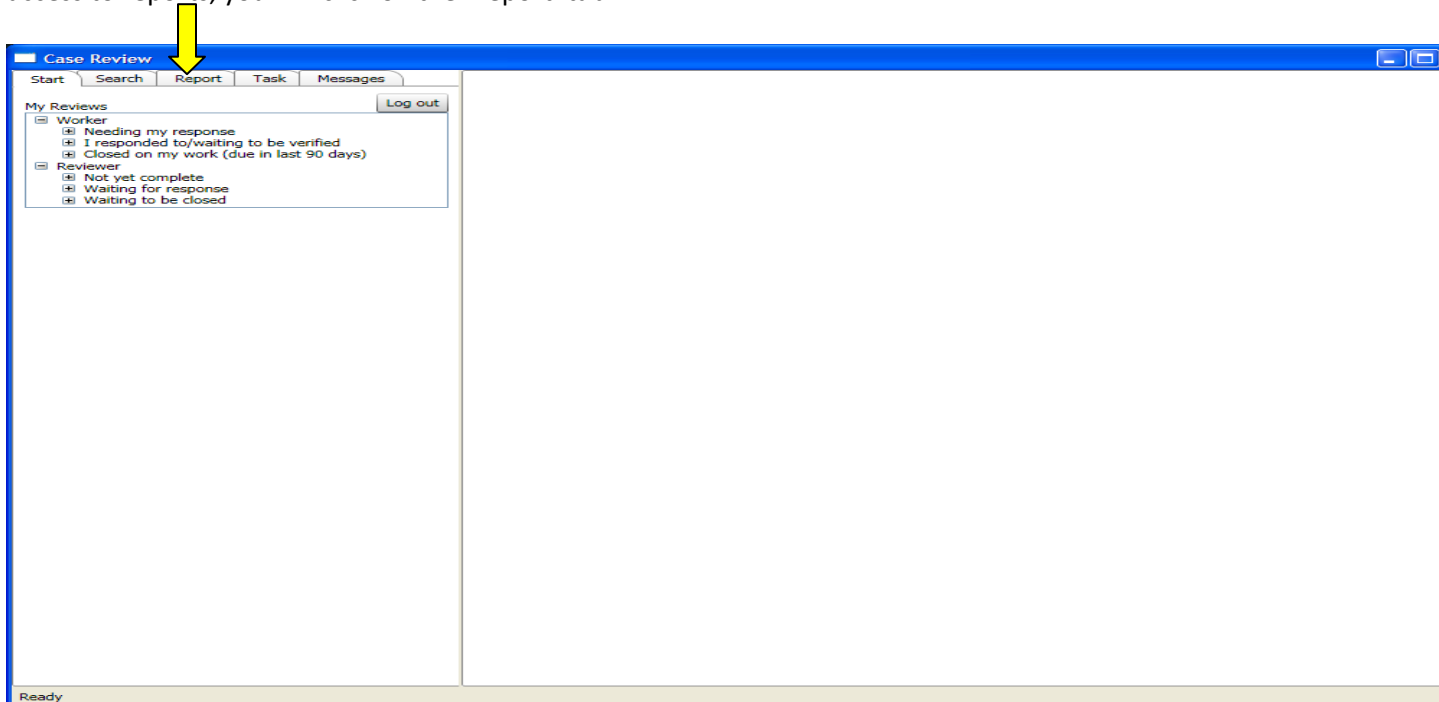
Report Permissions

	View
Error Summary	<input checked="" type="checkbox"/>
Twelve Month Summary	<input checked="" type="checkbox"/>
Unit Summary	<input checked="" type="checkbox"/>
Worker Summary	<input checked="" type="checkbox"/>

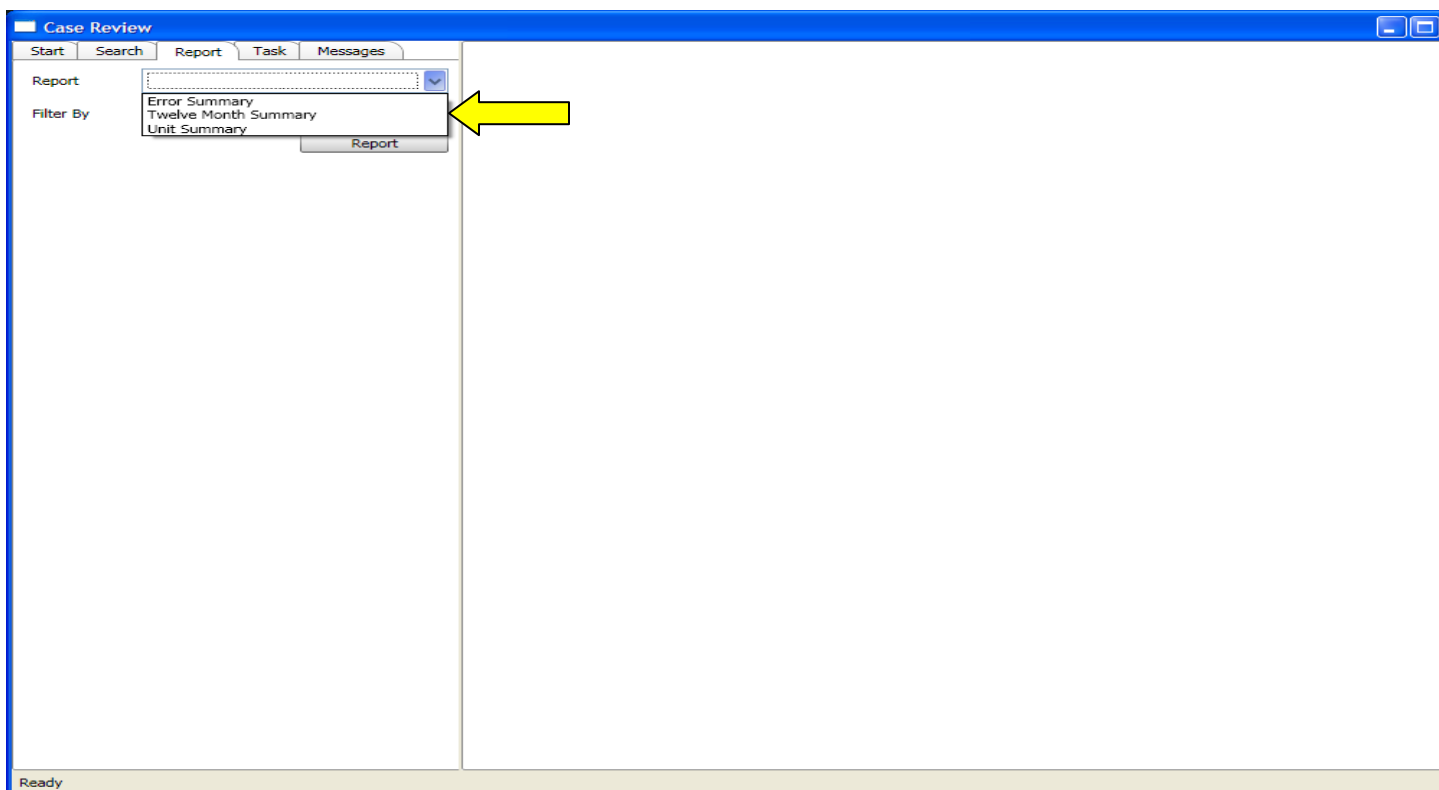
No changes to save for Case Review User: Agnes Gregory.

DHSS\AMLenda v1.0.1.19

Access to the reports function must be authorized by an administrator in the user profile. If you have been authorized access to reports, you will click on the 'Report' tab.



There are three report options listed in the 'Report' drop down. They are Error Summary, Twelve Month Summary and Unit Summary reports.



Once you have selected the type of report you want to run, click on the 'Report' button to bring up the report parameter selection window. Select start and end dates for the report (if you want different dates than the default) and then the appropriate criteria from the available dropdown choices.

The 'Select by' dropdown allows you to select the report by Unit, Reviewer, or Worker. Once you have selected all criteria click on the 'View Report' button. You will have to wait a few seconds while the report is being generated. Once the report is generated it will pop up.

32

You can right click and drag the window to expand the view.

Reviews	6
Errors	3
Case Error Rate	50.00%
Correct	3
Amount Paid	\$100
Error Amount	\$1089

Case Accuracy Rate

Payment

You can also change the view by clicking on the double arrows to expand or hide areas. To print a report, click the print icon.

Case Review

Report Instance

New Subscription

Start Date: 9/4/2009 End Date: 12/3/2009 View Report

Select by: Worker Selection: [Redacted]

Program: Adult Public Assistance, CAMA, C Review Type: Clean Sweep, NULL, Peer Review

ReviewTarget: 100%, Allotment, Deductions, E Case Review State: Closed

First Group: Type Second Group: Reason

Third Group: Factor

100% Find | Next Select a format Export

Reviews 6
Errors 3
Case Error Rate 50.00%
Correct 3
Amount Paid \$100
Error Amount \$1089

Case Accuracy Rate

Payment Error Rate

Error Summary

Ready

33

Use the scroll bars to view report narrative.

Case Review

Report Instance

New Subscription

Start Date: 9/4/2009 End Date: 12/3/2009 View Report

Select by: Worker Selection: [Redacted]

Program: Adult Public Assistance, CAMA, C Review Type: Clean Sweep, NULL, Peer Review

ReviewTarget: 100%, Allotment, Deductions, E Case Review State: Closed

First Group: Type Second Group: Reason

Third Group: Factor

100% Find | Next Select a format Export

Error Summary

Type	Reason	Factor	Count	Percent	Dollars	Per
333 SSI and/or State SSI Supplemental			2	66.67%	989	
335 Unemployment Compensation			1	33.33%	100	
			3	100.00%	1089	1

Worker: Agtarap, Chona
 Programs: Clean Sweep, NULL, Peer Review, Re-Review, Regional Review, Supervisory
 Programs: 100%, Allotment, Deductions, Earned Income, Household Composition, NULL, PERM, Self-Employment, Unearned Income
 Case Review State: Closed
 Programs: Adult Public Assistance, CAMA, Child Care, Food Stamps, General Relief Assistance, Heating Assistance, Interim Assistance, Medicaid, Temporary Assistance
 Page 1 of 1
 12/3/2009 8:1

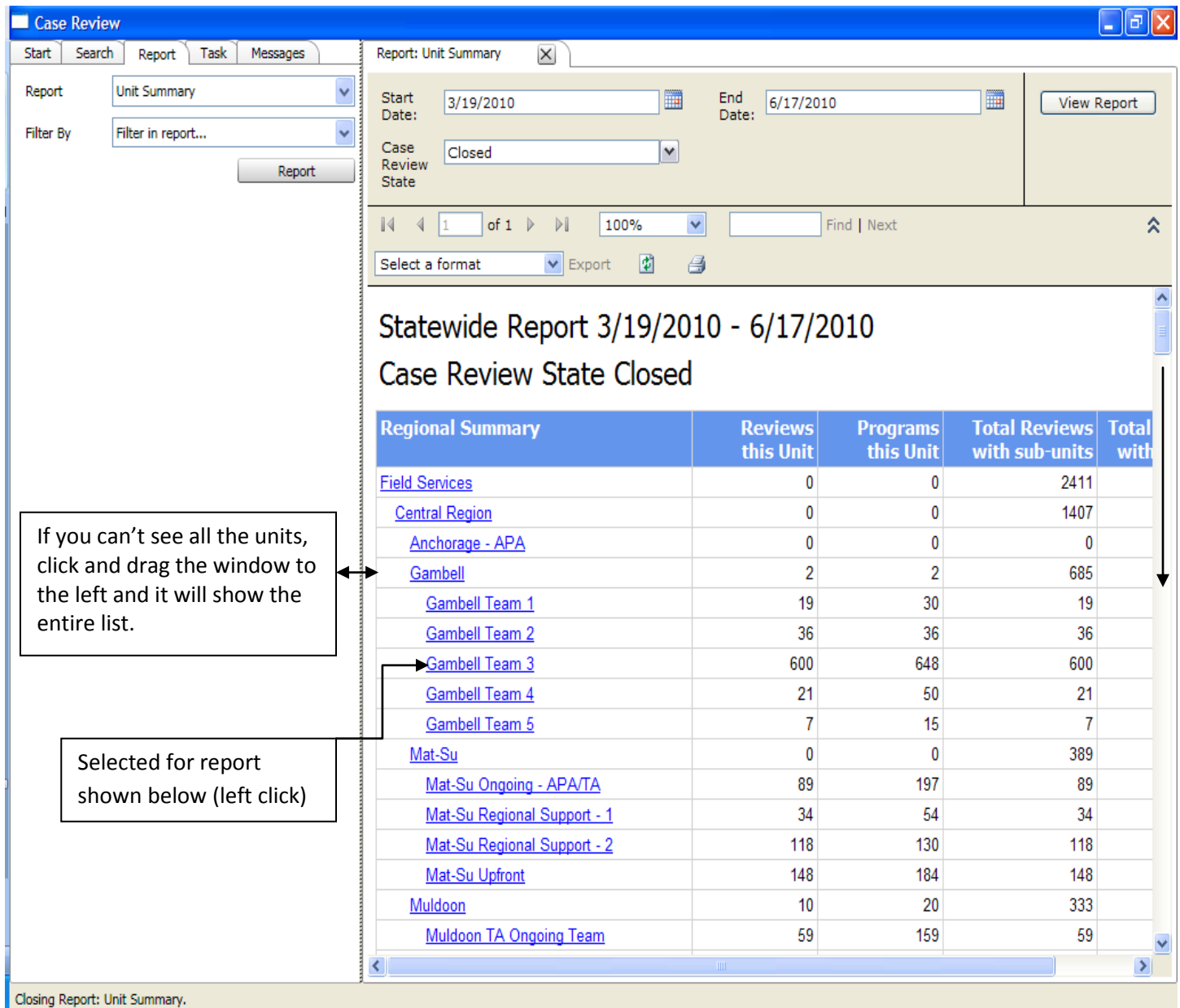
Ready

Creating a Worker Report

To create a report on a worker start at the Report tab, select Unit Summary from the Report dropdown and click on the Report button. The default start and end dates encompass the last 90 days. If you are looking for a different period for the report change the start and/end dates **before** clicking on the View Report button. This will bring up the list of units. You will have to select the unit the worker is currently assigned to.

Important Note: The end date selected for the report is based on the 'due date' noted in the review. If a review was closed with a 'due date' in the future, the report will not pick it up till after that future date even though the review is closed so you will want to select an end date that is 10-15 days in the future.

It is best to change the due date to current date before closing a review if it is being closed before the original due date. This prevents having to ask for reports for future dates.



Case Review

Start Search Report Task Messages

Report: Unit Summary

Report: Unit Summary

Start Date: 3/19/2010 End Date: 6/17/2010

Filter By: Filter in report...

Case Review State: Closed

View Report

1 of 1 100% Find | Next

Select a format Export

Statewide Report 3/19/2010 - 6/17/2010

Case Review State Closed

Regional Summary	Reviews this Unit	Programs this Unit	Total Reviews with sub-units	Total with
Field Services	0	0	2411	
Central Region	0	0	1407	
Anchorage - APA	0	0	0	
Gambell	2	2	685	
Gambell Team 1	19	30	19	
Gambell Team 2	36	36	36	
Gambell Team 3	600	648	600	
Gambell Team 4	21	50	21	
Gambell Team 5	7	15	7	
Mat-Su	0	0	389	
Mat-Su Ongoing - APA/TA	89	197	89	
Mat-Su Regional Support - 1	34	54	34	
Mat-Su Regional Support - 2	118	130	118	
Mat-Su Upfront	148	184	148	
Muldoon	10	20	333	
Muldoon TA Ongoing Team	59	159	59	

Closing Report: Unit Summary.

Scroll down the report to see all listed units. Once you find the unit the worker is assigned to, click on it to list all workers currently assigned to the unit (screen will show report is being generated).

Once the report has generated you will have to scroll all the way down to the bottom of the page to see the list of workers assigned to this unit.

Note: The workers name will not appear on the list if there have not been any reviews completed on them for the report period. For example: this report was for the period Mar 19-Jun 17 2010 and worker Jane Doe has been assigned to the Gambell Team 3 for the last twelve months. Jane has not had any reviews completed on her for the requested report period so her name will not show up on this report even though she is correctly assigned to Gambell Team 3 in the program.

Case Review

StartSearchReportTaskMessage

ReportUnit Summary

Filter ByFilter in report...

Report: Unit Summary

1 of 1100%FindNextSelect a formatExport

Medicaid	55	0	0	0.00%
Temporary Assistance	1	0	0	0.00%

Gambell Team 3 Workers

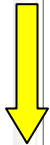
Unit	Is Active	Worker	Review Count	Program Count
Gambell Team 3	<input checked="" type="checkbox"/> Active (15)		630	681
			7	11
			37	43
			48	48
			34	34
			55	55
			60	60
			59	62
			9	16
			22	25
			71	72
			27	48
			47	49
			82	82
			36	40
			36	36

Workers in bold are unit supervisor.

* Worker is in more than one unit.

Report Execution: 6/17/2010 1:28:20 PM By : Lenda, Aina

No changes to save for Case Review: 05605010 due 06/21/2010.



Now click on the name of the worker you want the report for.

The legend states when a worker has an asterisk * next to their name, they have been assigned to other units in the past. This report will pull up all reviews completed on this worker no matter what unit they were assigned to in the period selected. However, **if you select a unit report by clicking on the unit (Gambell Team 3), it will only show the reviews completed on this worker while assigned to the selected unit, totals in the unit report may not include all the reviews completed on a worker.**

Case Review

Start

Report: Unit Summary

Report:

1 of 1

100%

Find | Next

Select a format

Export

Filter By

Medicaid	1	0	0.00%
----------	---	---	-------

Gambell Team 3 Program Payment Summary


Program Name	Months Reviewed	Reviewed	Authorized	Payment Error
CAMA	5	0	0	0.00%
Food Stamps	306	59254	60619	2.30%
General Relief Assistance	17	7595	7595	0.00%
Medicaid	1	0	0	0.00%

Gambell Team 3 Workers

Unit	Is Active	Worker	Review Count	Program Count
Gambell Team 3	<input checked="" type="checkbox"/> Active (9)		456	457
			41	41
			48	48
			59	59
			17	17
			73	73
			52	52
			62	62
			64	64
			40	41

Workers in bold are unit supervisor.
 * Worker is in more than one unit.

No changes to save for Case Review: 05576466 due 01/27/2010.

This is the generated worker report. It shows the data and details the 32 supervisory reviews (if you scrolled down the report). Note there are also 37 regional reviews completed on this worker. You can see the detail of those by clicking on the plus box  in front of 'Regional Review' to open the list of cases reviewed.

Case Review

Start

Report: Unit Summary

Report

1 of 1

100%

Find | Next

Select a format

Export

Filter

Worker:

Program Summary

Program Name	Reviews	Case Errors	Error Rate	Months	Authorized	Reviewed	Payment Error
CAMA	1	0	0.00%	1			0.00%
Food Stamps	52	10	19.23%	94	15156	16960	11.90%
General Relief Assistance	4	1	25.00%	4	4315	200	95.37%
Medicaid	5	0	0.00%	5			0.00%
Totals	62	11	17.74%	104	19471	17160	30.40%

Error Summary

Program Name	Error Type	Error Count
Food Stamps	130 Citizenship/Identity	1
Food Stamps	335 Unemployment Compensation	2
Food Stamps	930 Benefits Not Authorized - Alerts	7
General Relief Assistance	346 Other Unearned Income	1

Case Summary

Type	Client Name	Case Number	Review Due Date	Outcome	Authorized	Error
Regional Review - 37						
Supervisory - 32		05436971	06/08/2010	Correct	\$239	\$0
		05436971	06/08/2010	Case Error	\$0	(\$239)

No changes to save for Case Review: 05605010 due 06/21/2010.

Note: The Case Error total and Error Count total in the Error Summary may not always match. We only count one case error for the review but there may be multiple months in error or multiple reason codes for errors in the same month. For example a case reviewer looked at the food stamp program for first two months of the application. Both months were in error. The error summary would count this as two errors but only one case error would be counted for the review.

Error Summary Report

From the Report tab select Error Summary and click on the Report button. The report request window will open. You will need to adjust the report start and end dates if you want more than the 90 day default. Choose the parameters for your report. The First, Second and Third Groups allow you to sort the report by error group. The Type error will show if it was a household composition, earned income or a deduction error etc. The Factor shows causal factors such as Incorrect Procedure, Failed to Act on Info, Client Failed to Provide Info etc. Reason will show Change at application, Incorrect Budget, Detail Overlooked etc. Depending on what you want to target in your report you can change the order of those factors to sort the way you need it. After selecting all the parameters click on View Report to generate. Scroll down to view the full report.

Case Review

Report: Error Summary

Start Date

3/26/2010

End Date

6/24/2010

View Report

Select by

Unit

Selection

Gambell Team 3

Program

Food Stamps

Review Type

Clean Sweep, NULL, Peer Review

ReviewTarget

100%, Allotment, Deductions, E

Case Review State

Closed

First Group

Type

Second Group

Reason

Third Group

Factor

1 of 1

100%

Find | Next

Select a format

Export

Reviews

537

Errors

60

Case Error Rate

11.17%

Correct

477

Amount Paid

\$140,884

Error Amount

\$9,194

Payment Error Rate

6.53%

Case Accuracy Rate

Payment Error Rate

Error Summary

Type	Reason	Factor	Count	Percent	Dollars	Percent

No changes to save for Case Review: 05136441 due 04/26/2010.

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(Report Cont.)

In this report the parameters were 1st group/ Type, 2nd group Reason and 3rd group Factor.

Case Review

Report: Error Summary

Start Date3/26/2010End Date6/24/2010View Report

Select byUnitSelectionGambell Team 3

ProgramFood StampsReview TypeClean Sweep, NULL, Peer Review

ReviewTarget100%, Allotment, Deductions, ECase Review StateClosed

First GroupTypeSecond GroupReason

Third GroupFactor

1 of 1100%Find | NextSelect a formatExport

Error Summary

Type	Reason	Factor	Count	Percent	Dollars	Percent
930 Benefits Not Authorized - Alerts			20	33.33%	\$4,960	53.9%
311 Earned Income			11	18.33%	\$904	9.8%
335 Unemployment Compensation			7	11.67%	\$828	9.0%
990 Other			4	6.67%	\$543	5.9%
333 SSI and/or State SSI Supplemental			2	3.33%	\$487	5.3%
347 TANF			1	1.67%	\$349	3.8%
130 Citizenship/Identity			1	1.67%	\$239	2.6%
920 Notices/Adverse Action			1	1.67%	\$239	2.6%

No changes to save for Case Review: 05136441 due 04/26/2010.DHSS\AMLenda v1.0.1.19

When you click on the + in front of a Type it will open the second group (in this case Reason Code)

Case Review

Report: Error Summary

Start Date3/26/2010End Date6/24/2010View Report

Select byUnitSelectionGambell Team 3

ProgramFood StampsReview TypeClean Sweep, NULL, Peer Review

ReviewTarget100%, Allotment, Deductions, ECase Review StateClosed

First GroupTypeSecond GroupReason


Third GroupFactor

1 of 1100%Find | NextSelect a formatExport

311 Earned Income

Type	Reason	Factor	Count	Percent	Dollars	Percent
311 Earned Income			11	18.33%	\$904	9.8%
	Incorrect Procedure		4	36.36%	\$407	45.0%
	Failed to Request Info		2	18.18%	\$287	31.7%
	Misapplied Policy		2	18.18%	\$146	16.1%
	Client Failed to Provide Info		2	18.18%	\$33	3.6%
	Incorrect Calc Keyed		1	9.09%	\$31	3.4%
335 Unemployment Compensation			7	11.67%	\$828	9.0%
990 Other			4	6.67%	\$543	5.9%
333 SSI and/or State SSI Supplemental			2	3.33%	\$487	5.3%
347 TANF			1	1.67%	\$349	3.8%
130 Citizenship/Identity			1	1.67%	\$239	2.6%

No changes to save for Case Review: 05136441 due 04/26/2010.DHSS\AMLenda v1.0.1.19

Click on the  in front of the reason code and the third group will open up.

Case Review

Report: Error Summary

Start Date

3/26/2010

End Date

6/24/2010

View Report

Select by

Unit

Selection

Gambell Team 3

Program

Food Stamps

Review Type

Clean Sweep, NULL, Peer Review

ReviewTarget

100%, Allotment, Deductions, Es

Case Review State

Closed

First Group

Type

Second Group

Reason

Third Group

Factor

1 of 1

100%

Find | Next

Select a format

Export

Type	Reason	Factor	Count	Percent	Dollars	Percent
930 Benefits Not Authorized - Alerts			20	33.33%	\$4,960	53.95%
311 Earned Income			11	18.33%	\$904	9.83%
	Incorrect Procedure		4	36.36%	\$407	45.00%
		Incorrect Budget	3	75.00%	\$278	68.30%
		Failure to Check Policy	1	25.00%	\$129	31.70%
	Failed to Request Info		2	18.18%	\$287	31.70%
	Misapplied Policy		2	18.18%	\$146	16.11%
	Client Failed to Provide Info		2	18.18%	\$33	3.63%
	Incorrect Calc Keyed		1	9.09%	\$31	3.43%
235 Unemployment Compensation			7	11.67%	\$938	10.00%

No changes to save for Case Review: 05136441 due 04/26/2010.

DHSS\AMLenda v1.0.1.19

We can change the groups around and use Reason for the first group. The report shows how many reviews were Incorrect Procedure, then what Type they were (earned income, unemployment compensation etc) and then the Factor.

Case Review

Report: Error Summary

Start Date3/26/2010

End Date6/24/2010

View Report

Select byUnit

SelectionGambell Team 3

ProgramFood Stamps

Review TypeClean Sweep, NULL, Peer Review

ReviewTarget100%, Allotment, Deductions, E

Case Review StateClosed

First GroupReason

Second GroupType

Third GroupFactor

Note the Reason is now First Group, Type second and Factor third.

Export

Reason	Type	Factor	Count	Percent	Dollars	Percent
Incorrect Procedure			32	53.33%	\$7,020	76.35%
	930 Benefits Not Authorized - Alerts		20	62.50%	\$4,960	70.66%
	311 Earned Income		4	12.50%	\$407	5.80%
		Incorrect Budget	3	75.00%	\$278	68.30%
		Failure to Check Policy	1	25.00%	\$129	31.70%
	335 Unemployment Compensation		2	6.25%	\$402	5.73%
	347 TANF		1	3.13%	\$349	4.97%
	990 Other		1	3.13%	\$239	3.40%
	130 Citizenship/Identity		1	3.13%	\$239	3.40%
	020 Notices/Adverse Action		1	3.13%	\$239	3.40%

Closing Report: Twelve Month Summary.

DHSS\AMLenda v1.0.1.19

Print the Report: You will have to open the additional groups prior to printing. You can open just one Type as shown above or you can open them all as needed.

Twelve Month Summary

Select Twelve Month Summary in the Report drop-down and click on Report button to open the report request window. Select the parameters for the report by clicking on the drop downs to choose your options and then click on the View Report button.

Case Review

Start Search **Report** Task Messages

Report: Twelve Month Summary

Filter By: Filter in report... **Report**

Report: Twelve Month Summary

End Month: June End Year: 2010

Select by: Unit Selection: Gambell Team 3

Program: Food Stamps Review Type: Clean Sweep, NULL, Peer Review

ReviewTarget: 100%, Allotment, Deductions, E Case Review State: Closed

View

Closing Report: Error Summary. DHSS\AMLenda v1.0.1.19

This is the Twelve Month Report for Gambell Team 3. Prior to implementing this program, we did not have the capability to complete reviews down to the team level. We only had site level such as Gambell, Muldoon and MatSu so there is no data prior to January for this team.

Case Review

Report: Twelve Month Summary

End Month: June

End Year: 2010

View Report

Select by: Unit

Selection: Gambell Team 3

Program: Food Stamps

Review Type: Clean Sweep, NULL, Peer Review

ReviewTarget: 100%, Allotment, Deductions, E

Case Review State: Closed

1 of 1

100%

Find | Next

Select a format

Export

Monthly Summary Ending June 2010

	Jan 2010	Feb 2010	Mar 2010	Apr 2010	May 2010	Jun 2010	Total
Food Stamps							
Reviews	1	128	160	194	177	149	809
Errors		14	14	18	17	15	78
Case Error Rate	0.00%	10.94%	8.75%	9.28%	9.60%	10.07%	9.64%
Payment Amount	\$0	\$31,580	\$54,684	\$54,855	\$44,716	\$36,174	\$222,009
Error Amount	\$0	\$345	\$82	\$1,404	\$428	\$1,629	\$3,888
Payment Error Rate		1.09%	0.15%	2.56%	0.96%	4.50%	1.75%

Unit: Gambell Team 3

Programs: Clean Sweep, NULL, Peer Review, Re-Review, Regional Review, Supervisory

Programs: 100%, Allotment, Deductions, Earned Income, Household Composition, NULL, PERM, Self-Employment, Unearned Income

Case Review State: Closed

Program: Food Stamps

Page 1 of 1

Report Execution: 6/24/2010 10:33:59 AM By : Lenda, Aina

Closing Report: Error Summary.

DHSS\AMLenda v1.0.1.19

When you request a Twelve Month Report for the Gambell office prior to Feb 2010 the report shows the reviews from the old program for that office.

Beginning in Feb 2010 the Gambell report shows an office report that includes a total of Team 1-5 reviews for the period.

Exporting Reports

All reports allow you to export the data to a variety of programs. Click on the Export Select a Format drop-down to see the available options. Once you select a format, Export will turn blue and allow you to click on it to begin the export.

Case Review

Report: Twelve Month Summary

End Month: June

End Year: 2010

Select by: Unit

Selection: Gambell

Program: Food Stamps

Review Type: Clean Sweep, NULL, Peer Review

ReviewTarget: 100%, Allotment, Deductions, E

Case Review State: Closed

View Report

1 of 1

100%

Find | Next

Select a format

Export

Monthly Summary Ending June 201

	Jul 2009	Aug 2009	Sep 2009	Oct 2009	Nov 2009	Dec 2009	Jan 2010	Feb 2010	Mar 2010
Food Stamps									
Reviews	129	101	142	173	200	113	203	130	
Errors	39	26	20	28	19	10	22	14	
Case Error Rate	30.23%	25.74%	14.08%	16.18%	9.50%	8.85%	10.84%	10.77%	
Payment Amount	\$74,521	\$47,967	\$41,799	\$54,174	\$70,938	\$30,465	\$74,868	\$31,819	\$
Error Amount	\$4,694	\$1,935	\$481	\$674	\$420	\$234	\$1,311	\$345	
Payment Error Rate	6.30%	4.03%	1.15%	1.24%	0.59%	0.77%	1.75%	1.08%	

Unit: Gambell
Programs: Clean Sweep, NULL, Peer Review, Re-Review, Regional Review, Supervisory
Programs: 100%, Allotment, Deductions, Earned Income, Household Composition, NULL, PERM, Self-Employment, Unearned Income
Case Review State: Closed
Program: Food Stamps
Page 1 of 1
Report Execution: 6/24/2010 10:53:23 AM By : Lenda, Aina

Closing Report: Error Summary.

DHSS\AMLenda v1.0.1.19

In the following view, export to an Excel file was selected. You can then maneuver the data like any other Excel file. In this case I reduced the size of the file so I could print it all on one page.

	Jul 2009	Aug 2009	Sep 2009	Oct 2009	Nov 2009	Dec 2009	Jan 2010	Feb 2010	Mar 2010	Apr 2010	May 2010	Jun 2010	Total
Food Stamps													
Reviews	129	101	142	173	200	113	203	130	196	221	190	180	1978
Errors	39	26	20	28	19	10	22	14	19	18	17	15	247
Case Error Rate	30.23%	25.74%	14.08%	16.18%	9.50%	8.85%	10.84%	10.77%	9.69%	8.14%	8.95%	8.33%	12.49%
Payment Amount	\$74,521	\$47,967	\$41,799	\$54,174	\$70,938	\$30,465	\$74,888	\$31,819	\$67,117	\$60,836	\$46,036	\$45,149	\$645,689
Error Amount	\$4,684	\$1,935	\$481	\$674	\$420	\$234	\$1,311	\$345	\$17	\$1,404	\$428	\$1,629	\$13,572
Payment Error Rate	6.30%	4.03%	1.15%	1.24%	0.59%	0.77%	1.75%	1.08%	0.03%	2.31%	0.93%	3.61%	2.10%