

## To-Do List: MODULE OVERVIEW

### Module Overview:

In WAGES MIS there are Supervisor and Worker alerts that notify the user when some action or event has or needs to occur on a case. In OSST, the alert functionality is replaced by “To-Dos.” In addition to the current alerts that WAGES MIS users receive, OSST generates some additional to-dos. These to-dos are created by OSST to serve as reminders to review or maintain some portion of a case. Case managers also have the option of setting a non-case related, personal to-do. Case managers also have the option of creating tasks associated with a particular case (currently known as Future Date Alerts).

**NOTE:** The estimated time to complete this module is as follows:

Presentation: 30 minutes

Demonstration: 30 minutes

Activity: 1 hour

### Key Speaking Points:

1. The To-Do List is arranged into six categories:

- **Category 1: Case** - refers to major actions regarding the assignment or change in status for cases within a caseload. This category would include to-dos related to new cases, transferred cases, reopened cases and closed cases.
  - **Category 2: Penalty** - refers to the status of penalties for cases within a caseload. This category would include to-dos related to requested penalties, imposed penalties, lifted penalties and cash severance benefits.
  - **Category 3: Activities** - refers to the tracking and maintenance of ongoing activities for cases within a caseload. This category would include to-dos related to supportive services, training and activities, job placement follow up, job participation and assessments.
  - **Category 4: Informational** - refers to changes on cases in a caseload that do not require a specific action (e.g., pending disability benefits, program change).
  - **Category 5: Personal** – refers to tasks created by a specific user of OSST, not necessarily related to a case (may be created by other users of OSST like Supervisors or other Career Managers).
  - **Category 6: Historical** - refers to historical tasks which were identified as completed and cleared from another To-Do List category.
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## Trainer Materials

2. There are 30 types of to-dos available in OSST. This includes system generated to-dos, FLORIDA generated to-dos and self created to-dos. The following table provides an overview of each to-do:

To Do #	To Do Category - Type	Example Text
1	Case – New Cases*	(Customer Name) is a NEW customer in the One-Stop Service Tracking System.
2	Case – Closed Cases*	Case for (Customer Name) needs to be closed. Closure alert received from FLORIDA.
3	Case – Reopened Cases*	(Customer Name) has reopened their case and participation is required. Please review case history prior to assignment of next activity.
4	Case – Transferred (Service Provider)*	
5	Case – Transferred From*	The case for (Customer Name) is transferring out of unit (Region/County/Unit). Please close all services and update all JPRs. If employed, please leave jobs open and update JPRs.
6	Case – Transferred To*	The case for (Customer Name) has been transferred from unit (Region/County/Unit) to you. Please review IRP and activity assignments.
7	Activities – Job Placement Follow-up*	Verify (Customer's Name) continued employment and document the 90 day follow-up on the follow-up section of the placement.
8	Activities – Activities/Training*	Review (Customer's Name) appointment to start the training activity (Activity Name) which is scheduled to begin in one week on MM/DD/YYYY.
9	Activities – Assessments*	(Assessment Type) assessment was scheduled for (Customer Name) to complete on MM/DD/YYYY.
10	Activities – JPR's	
11	Activities – Services*	
12	Informational – Pregnancy Due Date*	

# Trainer Materials



To Do #	To Do Category - Type	Example Text
13	Informational – Pending Disability Benefits*	Mandatory customer (Customer Name) has a pending SSI/SSDI application. Please review ARCA for a change in time limit for the customer and update the case detail screen. Please obtain documentation and monitor the application.
14	Informational – Approved Disability Benefits*	SSI/SSDI benefits have been approved for (Customer Name) and customer has been given an exemption. Please close case.
15	Informational – Denied Disability Benefits*	SSI/SSDI benefits have been denied for (Customer Name). Please review IRP and work assignment.
16	Informational – Deferral*	
17	Informational – Program Change*	Please review work activity and hours assigned due to a change in program code by the FLORIDA PAS for (Customer Name) from (XX) to (XX).
18	Informational – Registration Status Change*	Status for (Customer Name) has changed from (XX) to (XX). After reviewing the reason for a change in Florida registration, please verify One-Stop Service Tracking status. NOTE: may require a case closure due to FLORIDA exemption or Mandatory participation due to the termination of exemption.
19	Informational – Transitional Services*	
20	Informational – SAMH*	
21	Informational – Hardship*	There is no Hardship Review completion date on file for (Customer Name)'s Second Hardship Appointment scheduled on MM/DD/YYYY for the hardship with the Referral date of MM/DD/YYYY.
22	History – Child SSN Change*	Social Security Number for a child of (Customer Name) has been automatically changed. Please update the hard file.
23	History – SSN Change by FLORIDA*	Social Security Number for (Customer Name) has been automatically changed. Please update the hard file.

# Trainer Materials

To Do #	To Do Category - Type	Example Text
24	History – SSN Change by Welfare Transition*	Social Security Number for (Customer Name) has been automatically changed. Please update the hard file.
25	History – Employer Information Change*	Verification of employment for (Customer Name) has been received and entered by the FLORIDA PAS. Please obtain or verify and enter!
26	Penalty – TANF Sanction*	Imposed: TANF sanction now in place by FLORIDA for (Customer Name) please close case and ensure services are terminated.  Lifted: TANF sanction for (Customer Name) is now lifted and customer is a mandatory participant. Please ensure activity assigned and offer services!
27	Penalty – Sanctions*	
28	Penalty – Cash Severance Benefit*	Customer (Customer Name) has been issued a severance benefit. Address ongoing transitional services and ensure JPRs are updated giving accurate credit through the last full month of cash eligibility, which you will need to verify.
29	Penalty – FSET Sanction*	Imposed: FSET sanction now in place by FLORIDA for (Customer Name) please close case and ensure services are terminated.  Lifted: FSET sanction for (Customer Name) is now lifted and customer is a mandatory participant. Please ensure activity assigned and offer services!
30	Personal – Personal	Free form text defined by user who created the task.