One Stop Service Tracking

Module 9: To Dos

Introduction to Module 9: To Dos

In WAGES MIS there are Supervisor and Worker alerts that notify the user when some action or event has occurred or needs to occur on a case. In OSST alerts are replaced by to dos. In addition to current alerts being replaced, additional to dos are created by OSST to serve as reminders to review or maintain some portion of a case or perform a non-case related personal task. You also have the option of creating tasks as personal reminders or tasks for other users of the system (known as future date alerts in WAGES MIS).

Module 9: To Dos

At the end of this module, you will be able to:

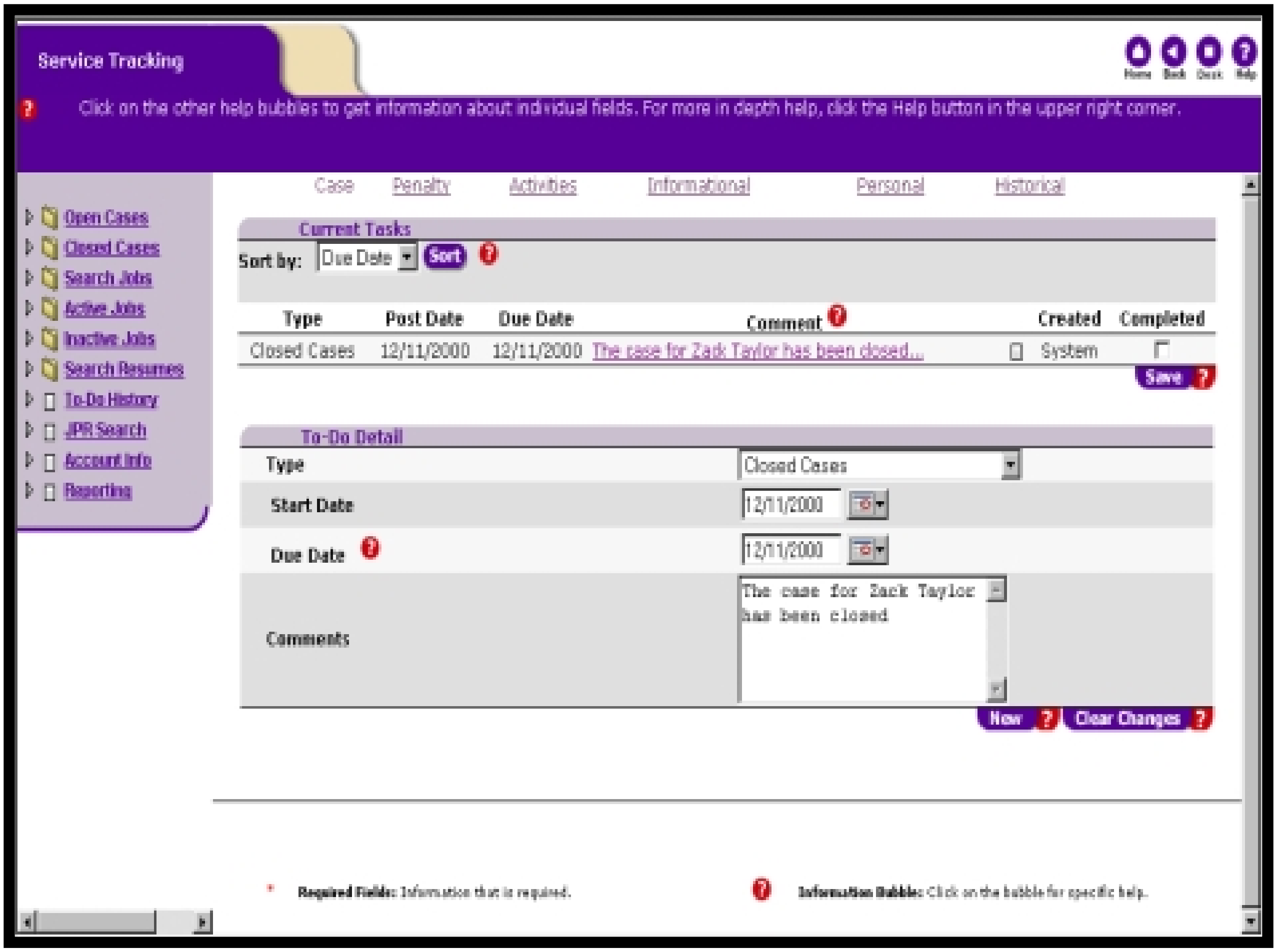
- ✓ Navigate to your To Dos
- ✓ Explain the Categories and Types of To Dos within OSST
- ✓ Use To Dos to Navigate to the Associated Case
- ✓ Create To Dos for Yourself/Other OSST Users
- ✓ Archive Completed To Dos

At the end of this module you will be able to:

- Navigate to your to dos
- Explain the various categories and types of to dos within OSST
- Use system generated to dos to navigate directly to the associated case
- Create to dos for yourself and other OSST users
- Archive completed to dos into a historical category

How do you access To Dos?

To dos are accessible via the OSST Desktop, the first page viewable upon login to the system. To return to the desktop at any time click the Desk icon located in the upper right hand corner of the application.



How is the To Do page organized?

To dos are organized into six (6) categories located across the top of the To Do page as hyperlinks. Click on a category hyperlink to view and maintain the associated types of to dos within that category. The To Do page consists of two distinct sections: Current Tasks and To Do Detail.

OSST contains many to do types to assist Career Managers with working their assigned cases and keeping track of personal tasks. To Dos are defined by the following six (6) categories, each category has within it various types of to dos

- **Category - Case** - relates to major actions regarding the assignment or change in status for cases within a caseload
  - New
  - Transfers
  - Reopen
  - Close

- **Category - Penalty** - relates to the status of penalties for cases within a caseload
  - Requested Penalties

- Imposed Penalties
- Lifted Penalties
- Cash Severance Benefit

- **Category - Activities** - relates to the tracking and maintenance of ongoing activities for cases within a caseload
  - Supportive Services
  - Training/Activities
  - Job Placement Follow-up
  - Job Participation
  - Assessments

- **Category - Informational** - relates to changes on cases in your caseload not requiring specific action

- **Category - Personal** - relates 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 - Historical** - relates to historical tasks which were identified as completed and removed from one of the above To Do lists or directly inserted for some FLORIDA created informational items

What are current tasks?

Current Tasks provides a list of active tasks within the selected category. This summary view provides the following information at a glance:

- **Type** - a summary level description of the task
- **Post Date** - the date the task was created
- **Due Date** - the date defined to complete the task on or before
- **Comment** - a brief description of the task. For quick reference an icon is located to the right of each comment in the Current Tasks list. Placing the cursor over this icon activates a pop-up where the full details may be viewed. Moving the cursor off of the icon hides the pop-up. Some to dos are related to a specific case. When the icon is clicked for these to dos you are taken to the case detail for the associated case.
- **Created** - who or what created the task, values include: System, self, supervisor, FLORIDA
- **Completed** - a check box used in conjunction with the ’Clear List’ button to remove items from the list and place them into a historical category

How do you maintain to dos?

The **To Do Detail** located in the lower portion of the page is where maintenance and creation of tasks are accomplished. Fields available include:

- **Schedule To Do for** - drop down list available only to Supervisors to select the user assigned to the task, values include: self and names of other users within Supervisors unit
- **Type** - drop list used to identify which category and type of task is being created/maintained
- **Start Date** - the date to begin working on the task
- **Due Date** - the date defined to complete the task on or before
- **Comments** - a brief description of the task

What actions can you perform regarding to dos?

- **Add a New To Do** – While OSST generates several To Dos, tasks may also be added by users of OSST. To add a to do click the 'New' button located at the bottom right of the To Do Detail area. The detail area is blank until the drop down list box, two date fields and the comments text box are completed. Start date is the only required field. However, the more detail you define, the clearer the task will be for later reference. Once you have completed the To Do Detail, click the 'Save' button located at the bottom right corner of the To Do Detail area.

- **View/Edit an Existing To Do** - Each self created to do can be edited by clicking on the Comments hyperlink for any task. This action loads the To Do Detail area of the To Do page where information may be changed as needed. To save changes, click the ‘Save’ button located at the bottom right of the To Do Detail section. **Note:** FLORIDA, System and Supervisor created to dos are not editable.

- **Archive Completed To Dos** - To Dos can be removed from the Current Tasks list by clicking on the 'Completed' check box for each To Do you wish to remove. To uncheck a task (remove it from the tasks to be archived), simply click the check box again, thereby removing the check mark. Once all tasks to be removed are selected with a check mark, click the 'Save' button located at the bottom right corner of the list. This action replaces the confirmation of alerts in WAGES MIS. Clearing to dos moves them into the Historical category for review at a later date, if necessary.

Listing of To Dos by Category – Type, Created by and Recommended Actions

*** Indicates to do is linked to a specific case if created by the system**

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*	
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*	

To Do #	To Do Category - Type	Example Text
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.
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.

To Do #	To Do Category - Type	Example Text
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.

Activity: Getting Familiar with To Dos

Scenarios:

- **Review your to dos within the cases category**
- **Review your to dos within the penalty category**
- **Review your to dos within the activities category**
- **Review your to dos within the informational category**
- **Review your to dos within the personal category**
- **Review your to dos within the historical category**
- **Create to dos for yourself**

Now it's your turn to practice using the system! Let's start by navigating to your to dos from the OSST Desktop. Perform the following tasks:

- Review your to dos within the cases category
- Review your to dos within the penalty category
- Review your to dos within the activities category
- Review your to dos within the informational category
- Review your to dos within the personal category
- Review your to dos within the historical category
- Create to dos for yourself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Questions?