SHS Legacy Customer Service Workflow (Reviewed Version 2.0)

CS1, Customer Service – use Intake menus

MG = Mark Grijalva, LH = LeAnn Hale, PC = Pranesh Chandra, GS = Ginger Stegman, MD = Myron Dong

Intake of case information into system

County, claimant, AR, send hearing request via phone, Fax, email to input case,

(Customer service Action): Determine if this is Scopes, disability case , Z

No

Customer Service Action: select 2, 1 menus
System Input: Case information, name, date, address, codes 60 or 90, narrative

System Action: generate case number based on format (year, julian date, case number) yydddxxxx

System action: auto generates notification letters to claimant, county and AR (if applicable)

(Go to Scheduler Action): Open calendar and schedule case using (operations action)unscheduled case report
15 min, PC, LH, MG

Yes, scopes, DHB, Z

(Customer service Action): Send to Scopes or DHB or Z for input or start input and send for more DHB Medical Packet input

(Go to DHB, Z Action): input case process and/ or add more data to HWDC and case management system

CS2, Customer Service – use PIAR menus

Intake of case information into system (mostly oral cases)

Oral Request, Claimant, AR send request via phone, Fax, email to input case,

Hardcopy request goes to customer service

No

C/S Action: select 9, 5 menus
System Input: Case information, name, date, address, codes 60 or 90, narrative

System Action: generate case number based on format (year, julian date, case number) yydddxxxx

System action: auto generates notification letters to claimant, county and AR (if applicable)

(Go to Scheduler Action): Open calendar and schedule case using (operations action)unscheduled case report
1 hour LH, MG

Enhancement: Stop extra printouts

Yes

(C/S Action): Send to Regional Offices or DHB or Z for input or start input and send for more data input

(Go to RO, DHB, Z Action): input case process and/or add more data process

CS3, Customer Service- Update case

Update cases based on request from anyone, Counties, address, personal info, contact information (same as Operations, County Update)

Customer Service Action: Look up Case.
System Input:: Case # or name

System Action: open case information screen

Customer Service Action: Input new or modify case information
15 mins , LH, MG, GS

CS4, Customer service – Withdrawal Case

Request to withdrawal case

County or claimant, AR Action: request withdrawal via phone, email, mail, request

Customer Service Action: Look up Case.
System Input:: Case # or name

Customer Service Action: access case withdrawal screen withdrawal and add narrative

System Action: update the status and priority code 30,31,40, and add narrative to case data

Customer Service Action: withdrawal goes to (appeals case list daily report sent to county)

System Action: letters generated and sent to county, Claimant, AR
15 mins, LH, GS

CS5, Customer service – Postpone Case

Request to postpone case

County or or claimant, AR Action: request postpone via phone, email, mail, request

Customer Service Action: Look up Case.
System Input:: Case # or name

Customer Service Action: access case postpone screen postpone and add narrative

System Action: update the status and action code 06, and add narrative to case data

Customer Service Action: goes to (appeals case list daily report sent to county)

System Action: letters generated and sent to county, Claimant, AR

(Go to Scheduler Action): Open calendar and schedule case using (operations action)unscheduled case report

Is this the First postponement?

Yes

Yes

Is this the Second postponement?

Customer Service Action: request verification of conflict received from county via Fax, mail (not email)

No

Customer Service Action: deny postponement and add narrative

System Action: update the status and action code 06, and add narrative to case data

Customer Service Action: goes to (appeals case list daily report sent to county) county or claimant, AR that changes were complete

System Action: letters generated and sent to county, Claimant, AR

Yes

Is this the Third postponement?

Customer Service Action: request verification by PJ, ALJ, received from county via Fax, mail (not email)

No

Notes: case can be closed after hearing date or no appearance

10 mins, LH GS

CS6, Customer service – close and Combine Cases

Request to close (newer case) and combine to older case due to duplicate or other reasons

County or ALJ Action: request close and combine via phone, email, mail, request

Customer Service Action: Look up NEW Case
System Input:: County Region, date range

Customer Service Action: access case Delete screen combine case number and add narrative

System Action: update case as closed 04, prehearing, 09 post hearing, and add filing date to the record of older case

20 mins LH

04 – combine with case

Delete and combine screen:
02 = GENERAL RELIEF
03 = REHEARING REQUEST (go to rehearing Action)
04 = COMBINE WITH CASE#

(also Operations reopen Action)

Is the older case to already scheduled?

CS7, Customer service – Reopen case

Request to reopen case due to no show, abandonment of scheduled hearing
-verbal withdrawal
-conditional withdrawl

Claimant, AR Action: request reopen via phone, email, mail, request

Customer Service Action: Look up Case.
System Input:: case # or name

Customer Service Action: access case reopen screen reopen and add narrative

System Action: update the status and action code 08, and add narrative to case data

Customer Service Action: respond to county that changes were complete(appeals case list daily report sent to county)

System Action: letters generated and sent to county, Claimant, AR

8 hours , LH

Notes: time limit to reopen, non appearance = 30 days
Conditional withdrawal = if conditions not met can reopen anytime

Function