SHS Legacy Operations Workflow (Reviewed Version 3.0)

O2, Regional Office – Update Dispositions

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

- Update disposition of cases based on return calendar response from Counties
- Operator Action: Look up Case. System Input:: case # or name
- System Action: open case information screen
- Operator Action: Update case status, disposition
- System Action: add narrative
- 1 hour , LH

O3, C/S, Regional Office, Special Projects- Update cases

- Update cases based on request from Counties, claimant , A/R, address, personal info, contact information
- Operator Action: Look up Case. System Input:: Case #, name
- System Action: open case information screen
- Operator Action: edit or update case information
- System Action: add narrative
- 10 min , LH

O4, C/S, Scheduler, Regional Office set 55 Hold

- Update case status and set to 55 hold
- Operator Action: Look up Case. System Input:: case # and name
- System Action: open case information screen
- Operator Action: set hold 55 status
- System Action: add narrative
- 10 min, LH

O5, Operator- > 90 Days Old Report

- Generate the > 90 days old report and send to Ops manager for review, then assigned to SSA or AGPA
- System Action: automated monthly report
- System Action: generate report on the screen, shows > 90 days old cases
- SSM will reconcile the report
- 2 hours per case, GS

O6, Operator- County Hearing w/decisions count Report

- Generate the count review
- Operator Action: Post on website for County review
- County Action: Review and respond back to SHD with information
- Enhancement – auto upload of the public info to the counties
- 30 min, LH

O7, Operator- Ad Hoc ALJ hours Report

- System Action: the Ad Hoc hearing days and ALJ hours Report on send to ALJ to review (payroll reconcilliation)
- Operator Action: create Ad-Hoc report System input: define by each judge
- System Action: generate report on the screen, shows count days/ hearings judge presided over
- Attendance coordinator reviews hours for payroll reconciliation,
- 3 hour, LH

O8, Operator – Scheduled Status Report

- System: Generate the scheduled status report (shows hearings with no dispositions)
- system Action: generate report System input: priority code 50, date range, county
- Operator Action: Call county to get disposition
- Operator Action: Update the disposition information
- System Action: allow input of information and save, update status code.
- 2 hour, LH
- Enhancement, automate the decision from judge #, to make the hours and days report.

O9, Operator, Manager – reports (enhancement)

- Report Wants (enhancement)
- Grant or deny, disposition, penalty, >10 days adopted date, uncoded cases.
- Operator Action: create Ad-Hoc report System input: County Region date range, disposition status, penalties, uncoded
- System Action: generate report on the screen, and PDF
- 5 min, LH

O10, Manager – Back-out Case

- Back-out Case due to incorrect input, priority code or status
- County or ALJ Action: communicate changes needed via phone, email, mail, like non-appearance – not heard, when actually heard
- Operator Action: Look up Case. System Input:: County Region, date range
- Operator Action: access maintenance screen to modify case data and add narrative
- System Action: allow input and modifications to the case data
- Enhancement, auto populate the code through the case data
- Operator Action: save and verify the changes
- Operator Action: respond to county or ALJ that changes were complete
- 20 min, LH

O11, Manager – reopen Case

- Reopen Case due to closed status
- Claimant or AR Action: communicate reopen request via phone, email, mail, request
- Operator Action: Look up Case. System Input:: case # and name
- Operator Action: access case reopen screen open and add narrative
- System Action: update the status and priority code 08, and add narrative to case data
- Operator Action: save and verify the changes
- Operator Action: respond to county claimant, AR via letter changes were complete (and case added to appeals listing)
- 5 min, LH

O12, Operator/ Manager – Delete Case

- Delete Case
- County or ALJ Action: communicate changes needed via phone, email, mail, request to delete case
- Operator Action: Look up Case. System Input:: case # and name
- Operator Action: access case delete screen , delete and add narrative
- System Action: update the status and priority code = 59, and add narrative to case data
- Operator Action: save and verify the changes
- 5 min, LH

O13, Operator/ Manager – Combine Case

- Combine Case
- Claimant or AR Action: communicate changes needed via phone, email, mail, request to combine case
- Operator Action: Look up Case. System Input:: case # and name
- Operator Action: access case delete/screen delete/and add narrative
- See C/S supervisor close and combine
- Enhancement, add to appeals case listing, required narrative, do not allow vacant operator code
- 10 min, LH

O14, Operator - Administrative Dismissals

- Admin Dismissal
- County Action: communicate changes needed with a document , email, mail, request to dismiss case, Reviewed by PJ and approved
- Operator Action: Look up Case. System Input:: case # and name
- Operator Action: access case sup screen: update status and narrative
- System Action: update the status and priority code and add narrative to case data
- Operator Action: save and verify the changes
- 30 min, LH

O15, Operator- Case number system generated upon input

- System Generated case number
- Operator Action: input (online) case
- System Action: generate case number based on format (year, julian date, case number) yydddxxxx
- 10 min, LH

O18, Operations - Dismissal

- Written request for dismissal is sent via SFT, Fax to Operations, example of a dismissal is the case is out of the counties jurisdiction.
- Operations Action: send the request to the Duty Judge to review and make a decision. System Action: update HWDC with narrative, and set to 55 Hold until decision is made
- Duty Judge makes decision dismissal granted or denied?
- No, dismissal is denied
- Yes, dismissal is granted
- System Action: letters sent to claimant, county, AR, stays on 55 hold for 15 days, if not rebutted in 15 days the case goes back on unscheduled cases and the 55 hold is removed
- Rebuttal within 15 days yes/no?
- Yes, Rebuttal to keeping case open
- No
- Goes to scheduling, 55 hold is removed case scheduled to be heard
- Yes, Rebuttal to the dismissal, review again may be new information
- System Action: letters sent to claimant, county, AR, stays on 55 hold for 15 days, if not rebutted in 15 days the case is closed in HWDC
- Rebuttal within 15 days yes/no?
- No, no rebuttal to the dismissal
- System Action: Administrative Dismissal, and Closed in HWDC, 55 hold is removed
- 1 hour