This All County Information Notice (ACIN) is to inform counties of the implementation of the new Supervisory Workspace functionality in the Case Management, Information and Payrolling System (CMIPS).
November 16, 2018

ALL COUNTY INFORMATION NOTICE NO. I-76-18

TO: ALL COUNTY WELFARE DIRECTORS
    ALL COUNTY IN-HOME SUPPORTIVE SERVICES PROGRAM
    MANAGERS AND SUPERVISORS

SUBJECT: IMPLEMENTATION OF SUPERVISORY WORKSPACE IN THE CASE
         MANAGEMENT, INFORMATION AND PAYROLLING SYSTEM FOR IN-HOME
         SUPPORTIVE SERVICES SUPERVISORS

This All County Information Notice (ACIN) is to inform counties of the implementation of the new Supervisory Workspace functionality in the Case Management, Information and Payrolling System (CMIPS).

BACKGROUND

Counties have requested additional functionality in CMIPS to assist supervisors in managing their workers’ caseloads and tasks. In response to this request, the California Department of Social Services (CDSS) has implemented the Supervisory Workspace functionality in CMIPS, which provides support for supervisors to manage case and caseloads for case workers who report to them in CMIPS.

The CMIPS Supervisory Workspace provides both at-a-glance overviews and more detailed lists, such as a view of all tasks due on a specific day. This new functionality will aid the supervisor in assessing workloads and can highlight priority tasks that should be completed urgently. Drilling down from workspaces gives more detailed information, enabling the supervisor to reassign cases and tasks, and to monitor the progress.
CMIPS MODIFICATIONS

The modifications to CMIPS to add the Supervisory Workspace include new screens and updates to existing screens. Many of the new screens in the Supervisory Workspace are list screens. On any of these screens which list more than 25 or 50 items, the user must select the “Next” and “Previous” links to scroll through the list of items displayed.

Only the users designated as a supervisor in CMIPS will have access to the new Supervisory Workspace screens. The supervisor must have a CMIPS User ID with a “CASEMANAGEMENTSUPERVISORROLE” or “PROGRAMMANAGEMENTROLE” security role. In addition, the supervisor must also have their “Application” set as “SupervisorCustomHome” in their Case Management User Home Profile (see Figure 1).

Existing Supervisor User IDs were updated automatically to allow access to the Supervisory Workspace if they had the CASEMANAGEMENTSUPERVISORROLE or PROGRAMMGMTROLE security roles. Any new Supervisor IDs created by a County Security Officer after the implementation of the Supervisor Workspace on October 3, 2018 will need to have the SupervisorCustomHome Application added by the County Security Officer.

When the “Case Management” link is selected by supervisor after the web portal login, two new tabs associated with the Supervisor Workspace will be displayed to the left of the user’s existing Case Management tabs:

- SW-Home
- SW-Teams and Workloads
Supervisory Workspace Home Screen

The **Supervisory Workspace Home (SW-Home)** screen displays when a case management supervisor logs in through the CMIPS web portal and then selects the Case Management link from the left navigation (see Figure 2). The supervisor may move between the Case Management Workspace and the Supervisory Workspace by simply selecting either the Supervisory Workspace or the Case Management Workspace tab in the upper left corner of the SW-Home screen.

Three screens which currently allow a supervisor to transfer caseloads will be modified and moved from the Case Management application to the Supervisory Workspace (see Figure 2).

![Figure 2 - Supervisory Workspace Home Screen](image)

The SW-Home screen displays the following clusters:

- My Organization Units
- My Work Queues
- My Tasks
- My Assigned Workload
- Recent Notifications

The purpose of each of these clusters is to provide overview information and a link to each individual workspace within the Supervisory Workspace.

The SW-Home screen can be customized by the user by selecting the “Customize” button in the upper right corner of the screen. Each cluster on the screen may be rearranged as the supervisor desires by simple clicking on the darker blue band at the
top of each cluster and dragging the cluster to another area of the screen. The user may also customize which of the clusters to display on their **SW-Home** screen by selecting the check boxes next to the cluster names (see Figure 3).

![Figure 3 – Customize SW Home Screen](image)

**My Organization Units Screen**

The **My Organization Units** cluster displays the organization units to which the supervisor is associated. To view the organization units, select the “My Organization Units” arrow (see Figure 4).

![Figure 4 – My Organization Units Screen](image)
My Work Queues

The *My Work Queues* cluster displays the work queues to which the supervisor is subscribed. To view the work queues, select the work queue “Name” link. When the “Work Queue Name” link is selected the *Work Queue Workspace* screen displays allowing the supervisor to view all individuals subscribed to the selected Work Queue (see Figures 5 and 6).

![Figure 5 – My Work Queues Screen](image1)

![Figure 6 – Work Queue Workspace Screen](image2)
My Tasks

The *My Tasks* cluster displays the tasks assigned to the supervisor and allows the supervisor to create a new task for themselves or another case worker. The “My Tasks” cluster displays the most recent case worker tasks. Tasks may also be escalated by the supervisor should the required action not be completed within a specified time frame. Each task may have a unique escalation process defined. These escalation strategies may encompass up to four hierarchical levels for approval. This escalation strategy may depend upon the organizational structure defined for the county.

Supervisors can also create a task by selecting the “Create Task” link and assign the task to a specific case worker or work queue (see Figure 7).

![Figure 7 – My Tasks Screen](image)

Recent Notifications

The *Recent Notifications* cluster displays the most recent notifications sent to the supervisor. This cluster will help the supervisor avoid missing important notifications (see Figure 8).

![Figure 8–Recent Notifications Screen](image)
Assigned Workload

The Assigned Workload cluster displays a list of all case workers reporting to the supervisor and the number of active cases assigned (Pending, Eligible, Presumptive Eligible or Leave status). In this cluster, a Name link can be selected to display the case worker workspace for the case worker selected. The supervisor can view all the case workers by selecting the “My Users” arrow (see Figure 9).

![Assigned Workload Screen](image)

Supervisory Workspace - Team and Workloads

When the “SW-Team and Workloads” tab is selected in the upper left corner of the CMIPS Home screen, the My Users screen displays the case workers assigned to the supervisor. The purpose of this screen is to assist supervisors in managing the caseloads and tasks assigned to their case workers (see Figure 10). In addition, the screen also provides a summary of each case worker’s workload by displaying a total count of their active, reserved, and assigned tasks. The supervisor can also use this screen to view the User ID information associated with each case worker, such as the Last Logon and whether the User ID has been placed on leave or exempt from the User ID deactivation process.

Note: Only CDSS can exempt a User ID from the deactivation process.
When the Name link is selected from the *My User* screen, the *User Workspace* screen is displayed, which contains a “Manage Cluster” listing the information associated with the selected case worker (see Figure 11).
Manage Cluster

The Manage cluster contains four links that are existing functionalities in CMIPS:

- “Reserve Assigned Tasks” link
- “Reserve Tasks from Work Queue” link
- “Task Redirection” link
- “Allocation Blocking” link

Note: The “Available for Task Redirection” field in the Manage cluster indicates whether the case worker is available to have tasks redirected.

Content Tabs

There are four content tabs displayed on the User Workspace screen. These tabs provide the supervisor with quick overview of the tasks, cases, and work queues assigned to the county worker staff assigned to them in CMIPS.

The “Home” tab displays the case worker's workspace details such as work queue subscriptions, Organization Unit membership, and User ID management.

The User ID Management – Leave cluster on the Home Tab contains a “Leave” link that allows the supervisor to place the case worker’s User ID in a leave status as of a specified date. The “Leave” link only displays when a User ID Management Leave record does not exist. When selecting the “Leave” link, the User ID Management – Leave pop-up displays and prompts the supervisor to enter the start date for the Leave record. After the supervisor creates the Leave record for the case worker’s User ID, the action link will display as “End Leave”. The supervisor will select the End Leave link when the case worker’s User ID will be active in CMIPS. The purpose of the User ID Leave/End Leave functionality is to allow the supervisor to manage the case worker’s User ID and avoid it being inactivated. The supervisor should create a Leave record for the case worker’s User ID when they will be out of the office for an extended period. User ID’s that are not active in CMIPS for more than 90 days are subject to inactivation by CDSS.

The “Tasks” tab displays the case worker's task information, with links on the left navigation to access lists for their Assigned Tasks, Open Tasks, Deferred Tasks, Redirection History, and Allocation Blocking History.

The “Cases” tab displays a list of the cases assigned to the selected case worker. The supervisor may view the case details by selecting the “Case Number” link on this tab. After selecting this link, the user is taken to the existing Case Home page where the case details are displayed.
The “Work Queue” tab displays the work queues to which the case worker is subscribed, as well as the number of reserved tasks and tasks in queue for each work queue.

Questions regarding the content of this ACIN may be directed to the CMIPS Systems Operations Unit within the Systems Operations and Data Analysis Bureau at the following email address: CMIPSII-Requests@dss.ca.gov.

Sincerely,

Original Document Signed By:

DEBBI THOMSON
Deputy Director
Adult Programs Division

c: CWDA