PROJECT PURPOSE/BACKGROUND/PROJECT PITCH

In an effort reduce the number of duplicate person-based documents in ECF baskets that require HSR's review, an inactive cases clean-up has occurred. EWS historically held over 255,000 inactive cases in a variety of worker numbers and caseloads. Due to several factors, including outstanding work items in ECF, the original scope of the project had changed to exclude cases that have closed in 2019.

**WHAT**: Transferring inactive cases on an agency-wide level.

**WHY:** Creating a standardized process for transferring cases. Associated with the EWS Basket project.

To reduce the number of ECF documents that HSR's would be needed to review, specifically duplicate person-based documents for cases that are inactive, but in team's caseloads.

What's in it for HSRs:

HSS's will have a better idea of how many work items in ECF need to address.

HSR's will be 'spinning their wheels' less on documents that do not require action.

**WHERE:** Inactive basket - X127CCL

**WHO:** All case that are closed for 120 days that are inactive. Only excluded caseloads include METS caseloads.

**HOW:** 1st steps: Large Scale clean up: Involved 250,000 cases (2019)

Ongoing initiative: Transferring 4-month-old inactive cases on the first working day of the month.

POLICY AND PROCEDURAL REFERENCES

## POLI/TEMP

TE02.08.115- INACTIVE CASE - CASE/CURR

## HSR Manual

Lack of policy and procedure around intercounty transfers overall.

REQUIREMENTS:

The script will add cases to an excel sheet (using BULK INAC/REPT) that have been closed for 4 months or more and review the case number and basket to determine the appropriate transfer actions.

Deliverable of reducing the number of cases that are held in our pending or active caseloads.

# User Input/User Dialog

1. User will select to run the script

# Functionality(hierarchy)

1. Script will be saved be saved to [folder](file:///T:\Eligibility%20Support\Restricted\QI%20-%20Quality%20Improvement\BZ%20scripts%20project\Projects\BZ%20ongoing%20projects\CCL%20INAC%20Transfer) naming convention (Ex. 06-01-2020)
2. Dialog #1
3. Run query county wide
4. Script will run REPT/INAC
   1. Review all information from the REPT/INAC spreadsheet
   2. Excluding the cases from the exclusion list – the case will be listed on the excel sheet as excluded
   3. When complete REPT/INAC will save automatically, [folder](file:///T:\Eligibility%20Support\Restricted\QI%20-%20Quality%20Improvement\BZ%20scripts%20project\Projects\BZ%20ongoing%20projects\CCL%20INAC%20Transfer)
5. Footer month will be set to choose four months previous and appropriate year
6. BULK – Inactive Transfer will run Transfer the cases to X127CCL
7. When complete the complete will save automatically, to the same [folder](file:///T:\Eligibility%20Support\Restricted\QI%20-%20Quality%20Improvement\BZ%20scripts%20project\Projects\BZ%20ongoing%20projects\CCL%20INAC%20Transfer)
8. When complete, a success message will appear, consider an email being sent to QI team to let them know the task has been completed.

For each MAXIS Case Number, the script will do the following:

* 1. Determine if the case is in an excluded caseload or not - those that are excluded caseloads will read “excluded”
  2. Cases that are included:

### navigate\_to\_MAXIS\_screen("SPEC", "XFER")

1. confirm that we are on correct maxis screen
2. Remove secondary worker
3. Transfer cases to X127CCL
4. Confirm case was transferred
5. The list of all the cases will still be on the excel and those that are excluded caseloads will read excluded
   1. Determine if the case is in an excluded caseload or not.
   2. Output the collected MAXIS data into the applicable excel columns.
      1. WORKER
      2. CASE NUMBER
      3. CASE NAME
      4. APPL DATE
      5. INAC DATE
      6. TRANSFERED
      7. CONFRIM
6. The script will auto-format the column width.
7. Success message will be created when the script run is at its end.

### Data Elements Read/Input by the Script SPEC/XFER

|  |  |  |
| --- | --- | --- |
| **Data Elements** | **Variable Name** | **Coordinates (varchar, row, col)** |
| Case Number | MAXIS\_case\_number | N/A |
| Panel check | panel\_check, | 4, 2, 50 |
| Footer month and year | dail\_footer\_month\_year |  |
|  | servicing\_worker | 8, 18, 61 |
|  | worker\_check | 9, 24, 2 |
|  | transfer\_confirmation | 16, 24, 2 |

POTENTIAL RISKS OR LIABILITIES

Will keep the restart functionality asking the worker excel row to start if the script is restarted.

Will continue to consult and collaborate with QI Leadership to ensure we have a complete project that will benefit caseload management ongoing.

Ask Faughn last day of the month if any changes to Bulk Inactive – “Do you want to add any excluded caseloads to the Bulk inactive report for (month)?”

Limited risk is a potential for manual work of QI team/support staff.

Change management will be limited due to limited users.

The following caseloads have requested to be excluded from the script run: Updated 07/20

X127CCL, P927079X, P927091X, P927152X, P927161X, P927252X, PW35DI01, PWAT072, PWAT075, PWAT231, PWAT352, PWPCT01, PWPCT02, PWPCT03, PWTST40, PWTST41, PWTST49, PWTST58, PWTST64, PWTST92, X1274EC, X127966, X127AP7, X127CSS, X127EF8, X127EF9, X127EH9, X127EJ1, X127EM2, X127EM3, X127EM4, X127EN5, X127EN6, X127EN8, X127EN9, X127EP1, X127EP2, X127EP8, X127EQ6, X127EQ7, X127EW4, X127EW6, X127EW7, X127EW8, X127EX4, X127EX5, X127EZ2, X127F3E, X127F3F, X127F3J, X127F3K, X127F3N, X127F3P, X127F4A, X127F4B, X127FE2, X127FE3, X127FE6, X127FF1, X127FF2, X127FF4, X127FF5, X127FG1, X127FG2, X127FG5, X127FG6, X127FG7, X127FG9, X127FH3, X127FI1, X127FI3, X127FI6, X127FJ2, X127GF5, X127Q95, X127Y86

STATISTICAL INFORMATION

Manual run time in minutes: