# BULK – INACTIVE TRANSFER Logic Map

# Background

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 currently holds over 255,000 inactive cases in a variety of worker numbers and baskets. Due to several factors, including outstanding work items in ECF, the original scope of the project has changed to exclude cases that have closed in 2019. Cases that have closed in 2019 have been transferred back to the x number of origin.

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

**WHY:** Creating a standardized process for transferring cases. Associated with the EWS Baskets 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 baskets.

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 baskets include METS baskets.

**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.

# The script will do the following:

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.

# User Input/User Dialog

1. User will select to run the script
2. 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)
3. Dialog #1
4. Excel row to start

# Functionality(hierarchy)

1. Run query county wide
2. 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)

Excel Columns:

* + 1. ObjExcel.Cells(1, 1).Value = "WORKER"
    2. ObjExcel.Cells(1, 2).Value = "CASE NUMBER"
    3. ObjExcel.Cells(1, 3).Value = "CASE NAME"
    4. ObjExcel.Cells(1, 4).Value = "APPL DATE"
    5. ObjExcel.Cells(1, 5).Value = "INAC DATE"
    6. ObjExcel.Cells(1, 6).Value = "TRANSFERED"
    7. ObjExcel.Cells(1, 7).Value = "CONFRIM"

1. Footer month will be set to choose four months previous and appropriate year
2. BULK – Inactive Transfer will run Transfer the cases to X127CCL
3. 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)
4. When complete, a success message will appear, consider an email being sent to QI team to let them know the task has been completed.

# Main Script Functionality

For each MAXIS Case Number, the script will do the following if not an excluded basket:

### 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 baskets will read excluded

# Enhanced Functionality (possible next steps)

Review what barriers there would be when working a case FILTER for those prior – do we care for XFER?

1. Handling to deal with if case is locked in BGTX
2. Handling for addressing DISQ
3. I have not run into any major issues in the last couple of years running this script.

# Exclusions

The following baskets 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

# Reminders

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

# STAT coordinates

|  |  |  |
| --- | --- | --- |
| **Information** | **Screen** | **Coordinates (varchar, row, col)** |
| Navigating into spec/xfer | SPEC/XFER | “X” 7, 16 |
| servicing\_worker |  | 18, 61 |
| worker\_check |  | 9, 24, 2 |
| transfer\_confirmation |  | 16, 24, 2 |