

Best Practices for Second Party Reviews



Tip #1: Use the Second Party Review Percentage on an employee's profile to manage the percentage of their work that goes to review.

Tip #2: Check your Tasks/Reminders as often as you would email. You will likely receive daily requests for Second Party Reviews.



Left Navigation > Tasks/Reminders > Employee Tasks/Reminders

Important! Second Party Reviews are due on the same day they are requested. If the review is not completed on the same day, the caseworker must run eligibility again and request another second party review.

This requires extra coordination between you and the caseworker. As a result, as a best practice, try to complete the review the same day it is requested.

- Search for “*My Tasks/Reminders*” to view your own tasks.
- Narrow your search to Task/Reminder Type “*Second party review/case read.*”
- Enter today's date in both of the Task/Reminder Due Date Between fields to find all reviews that are due today.
- Search for Tasks/Reminders that were due in the past to find overdue reviews.

Tip #3: Establish a Second Party Review Daily Schedule

With IES, Second Party Reviews will become a daily part of your job role.

As a best practice, build time for Second Party Reviews into your schedule.

For example:

- Block out time 2:00pm-4:00pm on your calendar to complete the reviews.
- Ask them to include the case number and a brief description of the problem.



Tip #4: Keep Documentation of Your Second Party Reviews

To help you better manage your Second Party Reviews, consider keeping a notebook or log of your requests.



- Write down the Case Number and caseworker Name for each review you complete.
- If staff verbally notify you of a review (for example, after your established deadline has passed), ask them to bring you the Case Number.
- If you use email frequently, consider asking your staff to notify you of Second Party Review request via email until you become comfortable using Tasks/Reminders.



Frequently Asked Questions



1. Why are Second Party Reviews due the same day they are requested?

A case's eligibility results are only accurate on the same day they are run. Therefore, if a caseworker requests a Second Party Review on Monday, and you perform the review on Tuesday, there is a chance that the eligibility results would have changed overnight. As a result, IES will not allow you to submit results of a second party review on a case where the eligibility results were not determined on the same day.

2. Where should I enter comments for a Second Party Review?

Always enter the results of your review as Page Level Comments on the Certification page. This way the caseworker will always know where to look to view your remarks.

3. Which caseworkers have mandatory Second Party Reviews?

If a caseworker has the name of a reviewer listed for a program in their IES Employee Profile, a Second Party Review will be required. The review must be completed before eligibility results for that program can be certified. You may want to designate a review for new / probationary employees.

4. After a supervisor completes a Second Party Review and approves the results, are the eligibility results immediately certified? Will the Notice of Case Action be sent that evening? Can the caseworker add comments to the notice?

After a supervisor reviews and approves a Second Party Review, any authorized benefits and the Notice of Case Action will be generated during that evening's batch process.