

This Job Aid is designed to help you understand how to manage your day in IES and different places to find outstanding applications, cases, or tasks assigned to you or your team.



Managing My Day Checklist



1. Review the Case Progression Report

- Review the workload for your office by checking the Case Progression Report.
 - i. Navigate to the **Case Progression Report** page from the **Left Navigation**
 - ii. Select **Reports** and then select **Case Progression Report**.
 - iii. The **Case Progression Report** page displays. Reports are run nightly and the information is relevant up until the previous day



Workers can run the **Case Progression Report** on the following:

1. ABE Applications in the Inbox but not started
2. Applications where Application Registration is not completed
3. Applications where Application Registration is complete but Data Collection is not started
4. Applications where Data Collection is started but Eligibility is not run
- 5a. Applications where Intake is started, Eligibility Run. Not Certified. With Pending Verifications
- 5b. Applications where Intake is started, Eligibility Run. Not Certified. Without Pending Verifications
6. Applications where Data Collection is complete and some (but not all) EDGs are certified
7. Applications where Data Collection is complete and all EDGs are certified



2. Check My Inbox or the MH-132 Report (Caseworkers):

Check the **My Inbox** page OR the MH-132 report for all pending applications or cases to continue working (case-based workers).

- A. Case-based only workers, check the MH-132 Report (Weekly) for pending applications you started the previous week. Navigate to the **Search and View Reports** page from the Left Navigation by selecting **Reports**, and then click **[Search View Reports]**.
 - The MH-132 Reports run on Sunday evenings at 5pm and are available every Monday with the prior week's information.
- B. Use **My Inbox** to locate pending applications for registration to be completed. **My Inbox** will show all pending applications you've ever created up until the current day. Pending ABE applications will only appear on the **My Inbox** page when the application is registered past the **Application - Type** page during Application Registration. You can also use **My Inbox** to finish processing cases.
 - On the Left Navigation, click the **Organizer** tab and then click **My Inbox**. Complete Application Registration or Data Collection for any pending applications/cases.
 - For case-based workers, **My Inbox** is a great way to find registered applications and cases assigned to the worker:
 - Select one of the following options from the **Search for Employee** drop-down list.
 - *All Cases assigned to me*
 - *All applications assigned to me (application complete status)*
 - *All pending applications created by me*
 - *All Tasks/Reminders assigned to me*

- For task-based workers, **My Inbox** is a great way to find pending applications started by the worker:
 - Select the following option from the **Search for Employee** drop-down list.
 - *All pending applications created by me*



3. Review the EDM Inbox

Check the **EDM Inbox** to view outstanding work. You can use the EDM Inbox to complete any pending tasks (register ABE applications, process verifications submitted by customers, or complete Data Collection).

A. Register ABE Applications:

- For case and task based workers, on the **EDM Inbox** page, search for ABE applications by selecting the *Screen New Application* queue. ABE applications started by the worker will display as *In Progress*. ABE Applications waiting to be started will show as *New*.

B. For case-based workers, complete any pending tasks in the EDM Inbox. A queue selection is not required because these tasks are routed directly to the worker.

C. For task-based workers, check each applicable queue to locate pending and new tasks.



4. Review Tasks/Reminders

Review all non-EDM Tasks/Reminders.


A. For case-based workers, Tasks/Reminders are assigned directly to the worker.

- From the Left Navigation, select **Tasks/Reminders** and then select **Tasks/Reminders**, or access non-EDM **Tasks/Reminders** by clicking the *More* hyperlink located in the **My Tasks and Reminders** pane on the IES Homepage. Complete the Tasks/Reminders.

B. For task-based workers, Task/Reminders are assigned to the virtual worker.

- From the Left Navigation, select **Tasks/Reminders** and then select **Tasks/Reminders**. To search for Tasks/Reminders, select *Outstanding Tasks/Reminders* from the **Task/Reminder Preferences** drop-down list, remove the User ID from the **Employee User ID** field, and select a type from the **Task/Reminder Type** drop-down list. Check the **Exclude Tasks/Reminders for actual workers (for hybrid offices)** box. Complete the Tasks/Reminders.

Helpful Resources

	<p>Helpful Wizards:</p> <ul style="list-style-type: none"> • My Inbox • Search for a Report • Select a Report • EDM Inbox • Search for Tasks/Reminders • Retrieve Outstanding Tasks/Reminders • Case Progression Report <p>Helpful Job Aids:</p> <ul style="list-style-type: none"> • Reports Job Aid • MH Reports Job Aid • Searching the EDM Job Aid • Tasks/Reminders Job Aid • Tasks/Reminders Tips Job Aid
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