

The Different Types of Tasks and Reminders

Tasks are generated two different ways to notify a user of a required action: (1) manually created by a worker or (2) created by IES. Outstanding Tasks/Reminders display on the IES Homepage. Outstanding and processed Tasks/Reminders can be found by conducting a search on the **EDM Document Inquiry and Re-Index** page.

If a Task is manually-cleared, the caseworker must manually dispose of the Task/Reminder to mark it as complete. If a Task is IES-cleared, IES will mark the Task as complete and remove it from your outstanding Tasks/Reminders, once the required action has been performed.

Task Type	Task Text	Why was it Created?	Escalated to Manager?	IES or Manually Cleared?	Notes
Case Routing/ Transfer	An Application/Case has been assigned/transferred	To notify a worker of a new application/case assignment, when an Application/Case has been transferred from one worker to another within the same office.	No	Manually-Cleared/ IES Cleared	In task-based/hybrid offices this task and those associated with the transferred case, will follow established routing rules to a team or caseworker. The task is IES cleared when the worker Initiates Data Collection and selects “ <i>Intake</i> ” or “ <i>Continue previously selected action</i> ” from the “ What action do you want to Perform ” drop-down list.
Case Routing/ Transfer	An Application/Case transferred from another County/Office	To notify a worker of a new application/case assignment when an Application/Case has been transferred from another County/Office.	No	Manually-Cleared/ IES Cleared	In task-based/hybrid offices this task and those associated with the transferred case, will follow established routing rules to a team or caseworker. The task is IES cleared when the worker Initiates Data Collection and select “ <i>Intake</i> ” or “ <i>Continue previously selected action</i> ” from the “ What action do you want to Perform ” drop-down list.
Informational	Medical Application Processing Deadline is Approaching	To notify a worker that a Medical EDG for the program is still pending on the case.	Yes	IES-Cleared	Escalated to a manager 1 day after it arrives in the worker’s inbox and no action has been taken.

Task Type	Task Text	Why was it Created?	Escalated to Manager?	IES or Manually Cleared?	Notes
Policy/System exceptions	Policy exception and System error override has been requested	A worker has requested a Policy Exception from the Eligibility Summary page and forwarded the request to a manager.	No	IES-Cleared	
Run Eligibility	SNAP Has Not Been Disposed	A worker has processed the SNAP EDG and it is still in pending status.	Yes	IES-Cleared	Escalated to a manager 2 days after it arrives in the worker's inbox and no action has been taken.
Run Eligibility	Medical EDG has Not Been Disposed	A worker has processed the Medical EDG and it is still in pending status.	Yes	IES-Cleared	Escalated to a manager 2 days after it arrives in the worker's inbox and no action has been taken.
Second Party Review	Second Party Review required, click "Supervisor approved" button for approvals. Click "Return to worker" and "Supervisor approved" button if corrections needed.	A worker has processed a SNAP EDG and a Second Party Review is required from the manager.	No	IES-Cleared	
Second Party Review	Second Party Review returned for corrections. Review comments, make necessary changes and recertify.	A manager has completed a Second Party Review and returned to worker indicating corrections are needed.	No	IES-Cleared	After the review is returned, the necessary corrections must be made, eligibility must be re-run and the EDG(s) re-certified.
Second Party Review	Perform Second Party Review	A worker has processed a Medical EDG and a Second Party Review is required from the manager.	No	IES-Cleared	
Second Party Review	The EDG which you had sent for Second Party	A manager has completed a Second Party Review and	No	Manually-Cleared	

Task Type	Task Text	Why was it Created?	Escalated to Manager?	IES or Manually Cleared?	Notes
	Review has been disposed - see disposition outcome	disposed the Medical EDG.			
Second Party Review	The EDG which you had sent for Second Party Review is complete - see review outcome	A manager has completed a Second Party Review and informed the staff member of the outcome.	No	Manually-Cleared	
Second Party Review	Second Party Review Needed	A worker has processed an EDG and a Second Party Review is required from the manager.	No	IES-Cleared	
Verifications Due	Verification due/past due for pending EDG(s). Check for returned verifications.	Verifications are due in 2 days for a pending EDG. (Example: verifications are due in 10 days, this will be created on the 8 th day)	No	IES-Cleared	Tip: Review the Pending folder in the ECR to view all pending verifications.
Verifications Due	Verification due/past due for an active case. Check for returned verifications	The verifications are due in 2 days for an active case. (Example: verifications are due in 10 days, this will be created on the 8 th day)	No	IES-Cleared	Tip: Review the Pending folder in the ECR to view all pending verifications.
Worker Action Past Due	TANF Application Processing is Due.	30 days have passed since a customer applied for TANF and the EDG is still pending.	Yes	IES-Cleared	The TANF EDG must be processed on 31 st day after the application date, and benefits are due to the customer on day 45.

IES Task/Reminder Job Aid

How Do I Clear an IES Created Task/Reminder?

1. From **Left Navigation**, select **Tasks/Reminders** then **Tasks/Reminders**. The **Tasks/Reminders** page displays.
2. Search for Tasks/Reminders by **Case/Application #**, **Employee User ID** or Tasks/Reminders Status (outstanding or processed).
3. Click the checkbox next to the Task/Reminder you want to clear. The **Dispose** button enables.
4. Click **[Dispose]**. The Task/Reminder is marked as complete.



Tip: You can still view completed Task/Reminders in IES, by selecting the **Processed Task/Reminders** option from the **Tasks/Reminders Preferences** drop-down list.

The screenshot shows the IES Tasks/Reminders interface. On the left is a navigation menu with 'Tasks/Reminders' selected. The main area has a 'Tasks/Reminders' header and a 'Dispose' button circled in green. Below is a search criteria section with fields for 'Task/Reminder Preferences' (set to 'My Tasks/Reminders'), 'Employee User ID' (set to 'systuser123'), 'Case/App #', 'Escalated From User', 'Task/Reminder Type', 'Search by' (radio buttons for 'Due Date' and 'Issue Date'), and 'Begin Date' (05/27/2013 to 06/10/2013). There are 'Reset' and 'Search' buttons. Below the search criteria is a table titled 'Tasks/Reminders for systuser123 (Total Count = 4)'. The table has columns for Case Worker ID, Case/App #, Escalated From User, Case/App Name, Task/Reminder Text, Task/Reminder Type, Issue Date, Priority, and Due Date. The third row is selected, with its checkbox circled in green. The task text is 'An Application/Case transferred from another Country/Office.' and the due date is 06/10/2013.

Case Worker ID	Case/App #	Escalated From User	Case/App Name	Task/Reminder Text	Task/Reminder Type	Issue Date	Priority	Due Date
<input type="checkbox"/>	111016880	Bliss, Jill		SNAP Has Not Been Disposed		05/29/2013	Medium	05/29/2013
<input type="checkbox"/>	111016880	Bliss, Jill		SNAP Has Not Been Disposed		05/30/2013	Medium	05/30/2013
<input checked="" type="checkbox"/>	systuser123 111017554	Lname1234, Fname1234		An Application/Case transferred from another Country/Office.	Case assignment/Transfer	06/04/2013	Low	06/10/2013

Frequently Asked Questions

	<p>Question: What is the difference between a Task and a Reminder? Answer: A Task is an activity that has an action associated with it. A Reminder is typically informational in content. Reminders may not require specific action to be taken on a case whereas a Task usually will.</p>
	<p>Question: What happens if I clear a task, and the action has not actually been taken? Example: A “TANF Application Processing is Due” task was cleared on the Tasks/Reminders page, but the TANF program on the case was not actually certified and is still pending. Answer: A task can be cleared even if the action has not been taken. Once a task is cleared, it will not display again. You can create a manual task for yourself if needed.</p>
	<p>Question: How do I create a manual Task/Reminder? Answer: Refer to the Create a Task/Reminder wizard for step-by-step instructions on how to manually create a Task/Reminder.</p>
	<p>Question: Why are some Tasks/Reminders escalated to my manager? Answer: DHS/HFS Central Office has determined that certain Tasks/Reminders should be escalated to a manager when they become overdue. These Tasks/Reminders display in red text, and display in the appropriate manager’s Task/Reminder list.</p>

Helpful Wizards

	<p>Helpful Wizards:</p> <ul style="list-style-type: none">• Retrieve Assigned Tasks/Reminders for the Current User• Retrieve Outstanding Tasks/Reminders• Retrieve Another Employee's Tasks/Reminders• Create a Task/Reminder• Dispose a Task/Reminder• Transfer a Task/Reminder
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