Managing My Day in IES Checklist

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 (Caseworkers):

Check the **My Inbox** page for all pending applications to continue working.

A. Use **My Inbox** to locate pending applications for registration to be completed. **My Inbox** will show all pending applications you've created or worked on 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.
- **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:

- 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. Check each applicable queue to locate pending and new tasks.

☐ **4. Review Tasks/Reminders**

Review all non-EDM Tasks/Reminders.

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

Helpful Wizards:

- My Inbox
- Search for a Report
- Select a Report
- EDM Inbox
- Search for Tasks/Reminders
- Retrieve Outstanding Tasks/Reminders
- Case Progression Report

Helpful Job Aids:

- Reports Job Aid
- MH Reports Job Aid
- Searching the EDM Job Aid
- Tasks/Reminders Job Aid
- Tasks/Reminders Tips Job Aid