



North Carolina Department of Health and Human Services
Office of North Carolina Families Accessing Services through Technology (NC FAST)

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Governor

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Director

February 8, 2013

Subject: Case Banking and Task Management in NC FAST

Dear County Director of Social Services:

We want to share and clarify certain information regarding the use of case banks and task management in NC FAST. The current case banking process used in FSIS is not supported in NC FAST. However, a similar outcome can be achieved by using a different process.

The current FSIS process is as follows: Case banking is the process by which a county's FNS ongoing cases are assigned to one or a few FSIS Worker Numbers (Field 19) in FSIS. The FSIS Worker Number acts as a bank of the county agency's caseload, and may or may not be assigned to a real caseworker. As changes and recertifications are made to cases within the case bank, these transactions can be completed by any caseworker as the cases do not have a specified case owner. This process has allowed counties to share workloads and manage the completion of case maintenance actions across the entire county department of social services workforce, without having to rely on a specific caseworker to update a specific case.

The new NC FAST process is as follows: NC FAST requires that each case be assigned to a specific and real case owner, as denoted by the caseworker's NCID. Caseworkers are allowed to have only one NCID, and cases can be assigned to only one case owner at a time. Cases should not be assigned to fictitious persons or NCIDs in NC FAST. The reason that each case must be assigned to a real caseworker is that NC FAST is an automated system that will automatically inform the case owner of required case management actions that need to be completed to keep the case current and accurate using tasks. These tasks are generated by NC FAST automatically, and are sent directly to, and only to, the assigned case owner. For example, if NC FAST receives information via an interface that a client receiving benefits is no longer eligible, a task will be sent to the case owner prompting them to take action to update the case accordingly. Functionality of this sort was not previously available in FSIS.

Although NC FAST requires that each case have a real case owner, NC FAST does support a process by which work can be shared across the county departments of social services. This process is referred to as "task management." A caseworker can retrieve both system and worker-generated tasks through an inbox in NC FAST. These tasks can be redirected or forwarded to another caseworker for completion if needed, which allows work to be shared across the entire agency. NC FAST also provides a number of work queues or repositories for certain types of similar tasks that can be used to distribute tasks for completion by any caseworker, provided the caseworker has the appropriate NC FAST security role.

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For a caseworker to work tasks from a work queue and retrieve the task, they need only to be provided a subscription to the appropriate work queue. Additionally, NC FAST allows for ad hoc tasks to be created and sent to caseworkers from Reception or by individual caseworkers or supervisors. Task management allows counties to create a flexible process where work, or tasks, can be routed to the appropriate caseworker both automatically and manually.

To prepare to convert cases from FSIS to NC FAST, it was requested that all existing case banks in FSIS be dissolved, and that cases housed in a case bank be redistributed to individual FSIS Worker Numbers associated with real case workers. This is required because as cases are converted from FSIS into NC FAST, they are reassigned from FSIS Worker Number to NCID, which establishes the case owner in NC FAST. It is important that cases are assigned appropriately in FSIS prior to conversion so that after conversion one worker is not denoted as the case owner for the entire caseload of the agency and subsequently inundated with a high and unmanageable volume of tasks.

Additionally, we want to make you aware that if you assign cases, or plan to convert cases, to an NCID or worker in NC FAST who is not in an official NC FAST sanctioned security role, your county will be unable to authorize or recertify those cases until they are reassigned to a worker who is in an NC FAST sanctioned security role. Assigning or converting cases to a "NOACCESS" user not only creates a situation where the cases must be reassigned in order for the cases to be authorized or recertified, but also will result in these cases not showing up in the FNS Supervisor Dashboard reports. Only cases assigned to case owners in the sanctioned NC FAST security roles, such as Eligibility Worker and Eligibility Lead Worker, appear in the FNS Supervisor Dashboard report. Therefore, it is critical that all cases be assigned to case owners in the proper NC FAST security roles.

We encourage you to review the task management functionality provided in NC FAST to inform the establishment of the business process that best suits your needs. We understand a one size fits all approach does not work for all counties. The ability to rely on system-generated tasks, creation of ad hoc tasks, and the use of work queues allows for a flexible system that can support your county business process. As more programs are added to NC FAST, it is likely that additional types of tasks and work queues will become available and more prevalent in the system.

We encourage you to contact your NC FAST County Readiness Liaison if you have further questions or concerns.

Sincerely,



Anthony Vellucci

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