

Chapter 21 | WSC Case Load Transfers

Single Case Load Transfer

1. To begin, log into iConnect and set Role = Waiver or Pre-Enrollment Workstream Lead. Click **Go**.

The screenshot shows the iConnect user interface. At the top left is the iConnect logo. To the right, it says "Welcome, Jennifer Buck" and "5/4/2018 11:12 AM". There is a "My Dashboard" link and a "Sign Out" link. On the far right, there is a "Role" dropdown menu set to "Region Waiver Workstream Lead" and a "GO" button. Below this is a "Quick Search" section with a search box, a "Consumers" dropdown, a "Last Name" dropdown, and a "GO" button. To the right of the search box is an "ADVANCED SEARCH" link. At the bottom, there is a navigation menu with tabs for "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", "SCHEDULER", and "REPORTS".

NOTE: For Waiver, a single case load transfer would only happen in specific circumstances like if the WSC leaves the agency with no notice and the caseload needs to transfer to a supervisor temporarily until a new WSC can be selected.

2. Navigate to the consumer's record, click on the **Division** tab.
3. The list of open Division records displays. Select the APD Division record.

The screenshot shows the consumer record page for "Sheppard, Alice (10053)". The "Divisions" tab is selected. Below the tabs is a "Filters" section with a "Disposition" dropdown set to "Not Equal To", a "Closed" dropdown, and an "AND" button. There is also a "Division" dropdown and a "+" button. Below the filters is a "Search" button and a "Reset" button. Below the search buttons, it says "1 Divisions record(s) returned - now viewing 1 through 1". Below this is a table with the following data:

Division	Disposition	Primary Worker	Secondary Worker	Open Date	Close Date	LOS
APD	APD Eligible - ICF/ID	Buck, Jennifer	Buck, Jennifer	04/03/2018		31

4. The Division details page displays. Update the following fields:
 - a. Primary Worker = select the ellipsis to search for and select the new Waiver Support Coordinator worker that will receive the case load.
 - b. When prompted, select Yes to transfer any pending ticklers to the new worker

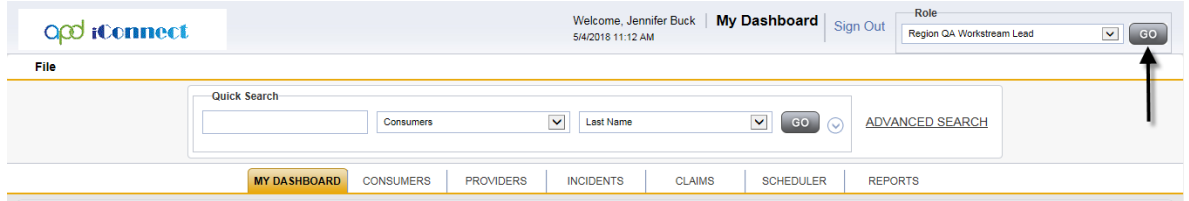
The screenshot shows the 'iConnect' software interface. At the top right, it displays the user 'Alice Sheppard', 'Last Updated by j buck', and the time 'at 4/25/2018 4:06:39 PM'. Below this is a 'Division' header. The main area contains a form for a 'Division' record. The 'Primary Worker' field is highlighted with a black arrow. A warning dialog box is open, stating: 'Changing the primary worker will update the worker designat on all pending assessments, authorizations, plans, plan revie ticklers, placements, payments, and any child-linked openpic records. Do you want to continue?' with 'OK' and 'Cancel' buttons.

Events	
Divison *	APD
Disposition *	APD Eligible - ICF/IID
Disposition Date	04/25/2018
Open Date	04/03/2018
Data Entry Date	04/03/2018
Primary Worker *	WSC, Best ... Clear Details
Secondary Worker	Buck, Jennifer ... Clear Details
Application Received Date *	01/01/2018
Interested in ICF/IID	Yes
Age Category at Time of Application *	6 and Above
Application Pended Due Date	
Eligibility Documentation Complete Date	
Referral Source	
Referral Date	04/03/2018
Referral Source	
Referral Reason	

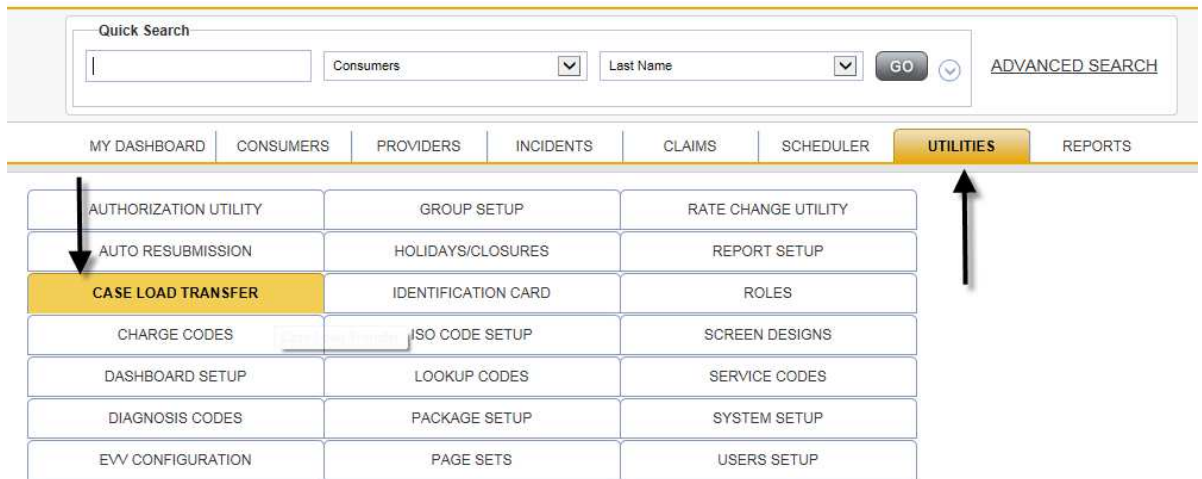
5. Click **File > Save and Close Division**.
6. Repeat this step for all applicable active Division records

Bulk Case Load Transfer

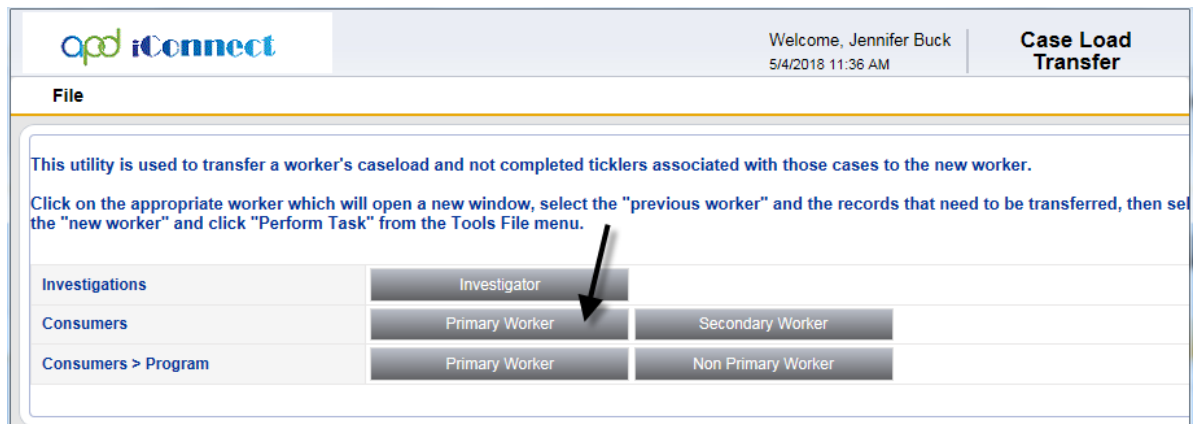
1. To begin, log into iConnect and set Role = Region QA Workstream Lead. Click **Go**.



2. Navigate to the **Utilities** Chapter. Select **Case Load Transfer**.



3. Click **Consumers > Primary Worker** to transfer part of or the full case load of one Waiver Support Coordinator to another.



4. The Case Load Transfer page displays. Update the following fields:
 - a. Click the Ellipsis next to **Previous Worker**, search for and select the current Waiver Support Coordinator Worker record.
 - b. Once the worker is selected, click **Display Case Load**
 - c. Click the ellipsis next to **New Worker**, search for and select the new Waiver Support Coordinator Worker record.

Consumer Case Load Transfer

Select the previous worker from the dropdown, click "Display Case Load" and a list of all active consumer records will appear below in a list view where the worker is listed in the Open/Close Page, check the box next to each record you wish to transfer then select a worker from the New Worker dropdown.

From the Tools File Menu select "Perform Task" to execute the transfer of the records and pending ticklers to the new worker.

Previous Worker *	Buck, Jennifer	... Click Details	Display Case Load
New Worker *	WSC, Best	... Click Details	
Generate Consumer Notification Letter	<input type="checkbox"/>		

1 Case Load Transfer record(s) returned - now viewing 1 through 1

Case No	Last Name	First Name	Status	Disposition	Fund Code	Disposition Date	Worker	<input type="checkbox"/>
10053	Sheppard	Alice	Active	APD Eligible - ICF/IID	APD	04/25/2018	Buck, Jennifer	<input type="checkbox"/>

<< First | < Previous | Retrieve | 1 | Records at a time | Next > | Last >>

5. Click the **Generate Consumer Notification Letter** box to save a Note with the WSC change notification attached for every Consumer record/Case that is being transferred.
6. The page refreshes. Update the following fields:
 - a. Note Type = WSC Selection
 - b. Note Subtype = Notification of WSC Change
 - c. Notification Letter = WSC Cover Letter New to Waiver

opd iConnect Welcome, Jennifer Buck
5/4/2018 11:51 AM **Case Load Transfer**

File Tools

Consumer Case Load Transfer

Select the previous worker from the dropdown, click "Display Case Load" and a list of all active consumer records will appear below in a list view where the worker is listed in the Open/Close Page, check the box next to each record you wish to transfer then select a worker from the New Worker dropdown.

From the Tools File Menu select "Perform Task" to execute the transfer of the records and pending ticklers to the new worker.

Previous Worker *	Buck, Jennifer	...Clear	Details	Display Case Load
New Worker *	WSC, Best	...Clear	Details	
Generate Consumer Notification Letter	<input checked="" type="checkbox"/>			

Consumer Notification

When the case load transfer is executed, and there is a notification letter selected in the Notification letter field, the letter will be generated and be attached to a note record for each consumer receiving a new worker. This note will be routed to the Note Attachment Print Queue where the attachment can be printed and mailed.

Note Type: *

Note Subtype:

Notification Letter:

1 Case Load Transfer record(s) returned - now viewing 1 through 1

Case No	Last Name	First Name	Status	Disposition	Fund Code	Disposition Date	Worker	<input type="checkbox"/>
10053	Sheppard	Alice	Active	APD Eligible - ICF/IID	APD	04/25/2018	Buck, Jennifer	<input type="checkbox"/>

<< First < Previous Retrieve Records at a time Next > Last >>

7. From the Case Load Transfer list view grid, select each case to be transferred by **checking the box** next to each case.

8. Click **Tools > Perform Task**.

opd iConnect Welcome, Jennifer Buck
5/4/2018 11:42 AM **Case Load Transfer**

File Tools

Perform Task

Consumer Case Load Transfer

Select the previous worker from the dropdown, click "Display Case Load" and a list of all active consumer records will appear below in a list view where the worker is listed in the Open/Close Page, check the box next to each record you wish to transfer then select a worker from the New Worker dropdown.

From the Tools File Menu select "Perform Task" to execute the transfer of the records and pending ticklers to the new worker.

Previous Worker *	Buck, Jennifer	...Clear	Details	Display Case Load
New Worker *	WSC, Best	...Clear	Details	
Generate Consumer Notification Letter	<input type="checkbox"/>			

1 Case Load Transfer record(s) returned - now viewing 1 through 1

Case No	Last Name	First Name	Status	Disposition	Fund Code	Disposition Date	Worker	<input type="checkbox"/>
10053	Sheppard	Alice	Active	APD Eligible - ICF/IID	APD	04/25/2018	Buck, Jennifer	<input checked="" type="checkbox"/>

<< First < Previous Retrieve Records at a time Next > Last >>

- Accept the acknowledgement. The page refreshes and transferred caseloads no longer appear in the Case Load transfer records list view.

Consumer Case Load Transfer

Select the previous worker from the dropdown, click "Display Case Load" and a list of all active consumer records will appear below in a list view where the worker is listed in the Open/Close Page, check the box next to each record you wish to transfer then select a worker from the New Worker dropdown.

From the Tools File Menu select "Perform Task" to execute the transfer of the records and pending ticklers to the new worker.

Previous Worker *

New Worker *

Generate Consumer Notification Letter

Consumer Notification

When the case load transfer is executed, and there is a notification letter select attached to a note record for each consumer receiving a new worker. This note can be printed and mailed.

Note Type: *

Note Subtype:

Notification Letter:

0 record(s) returned

Message from webpage
Case Load Transfer process completed successfully.
OK

- The Note is visible by navigating to the consumer's record. Click **Notes**. Select the **WSC Selection** Note in the list view to open.

View Consumer Incident

MY DASHBOARD **CONSUMERS** PROVIDERS INCIDENTS CLAIMS SCHEDULER UTILITIES REPORTS

Sheppard, Alice (10053)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module User


Demographics Divisions Consumer Budgets Programs Provider Selections SANs **Notes** Forms Appointments Plans Waiting List Payers

Filters
Note Date

38 Notes record(s) returned - now viewing 1 through 15

Note Date	Note By	Note Type	Note Sub-Type	Description	Status	Date Completed	Attachment
05/04/2018	Application, Harmony	WSC Selection	Notification of WSC Change	Bulk Case Load Transfer	Complete	05/04/2018	Yes
05/01/2018	Buck, Jennifer	Forensic	Initial Examining Report	Word Merge Template	Complete	05/01/2018	Yes
05/01/2018	Buck, Jennifer	Forensic	Involuntary Commitment	description	Complete	05/01/2018	No

- Repeat this process to transfer secondary worker caseloads as well as program caseloads as necessary.

Welcome, Jennifer Buck
5/4/2018 11:36 AM**Case Load
Transfer**

File

This utility is used to transfer a worker's caseload and not completed ticklers associated with those cases to the new worker.

Click on the appropriate worker which will open a new window, select the "previous worker" and the records that need to be transferred, then select the "new worker" and click "Perform Task" from the Tools File menu.

Investigations	Investigator	
Consumers	Primary Worker	Secondary Worker
Consumers > Program	Primary Worker	Non Primary Worker