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Workgroups Module

The focus of this module is the Assessment and Case Management workgroups in the Social Service Information System (SSIS).

The terms Case and Workgroup are often used interchangeably, however, in SSIS, while these are related and dependent on each other, they are not the same. A Case includes workgroups and demographic information of all clients associated with a single household. A Workgroup includes one or more clients within a case who are receiving services in a specific program area. Each workgroup is associated to a new or existing case when created.

Three types of workgroups:

- Intake – Used to record data regarding the incoming maltreatment reports and requests for information or services. The Agency screens the available information and determines its response. An Intake workgroup is always closed when completed but may be used to initiate an Assessment or Case Management workgroup. Click on SSIS Intake Module for more information.
- Assessment – Used to document information to assess or investigate maltreatment reports or requests for information or services.
- Case Management – Used to record necessary data and document service delivery and coordination.

Reference: *For additional information regarding a specific node or folder under the Participants folder, refer to the SSIS Worker Documentation page and other related resources on the Social Service Information System (SSIS) Resource Page.*

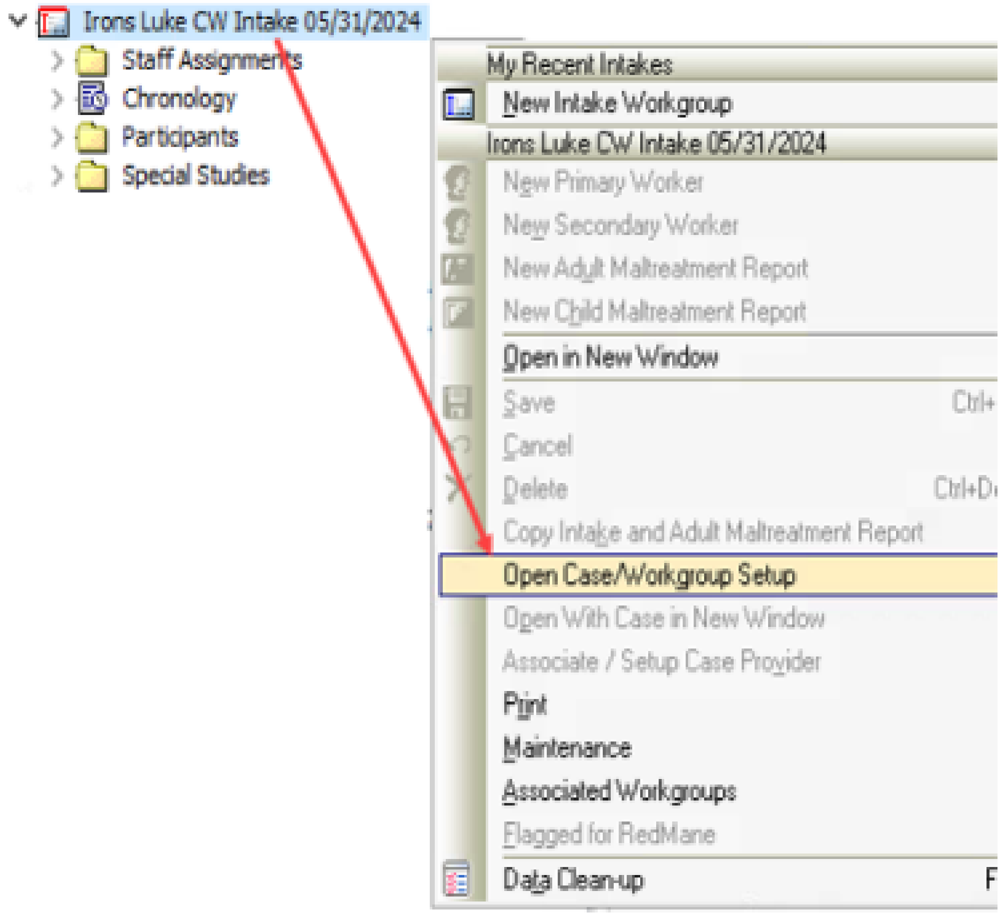
Case/Workgroup Setup – Transition Workgroups

After closing the Intake Workgroup, workers can use the **Case/Workgroup Setup** screen to create a new Case and/or Workgroup or refer an Intake Workgroup to an existing workgroup.

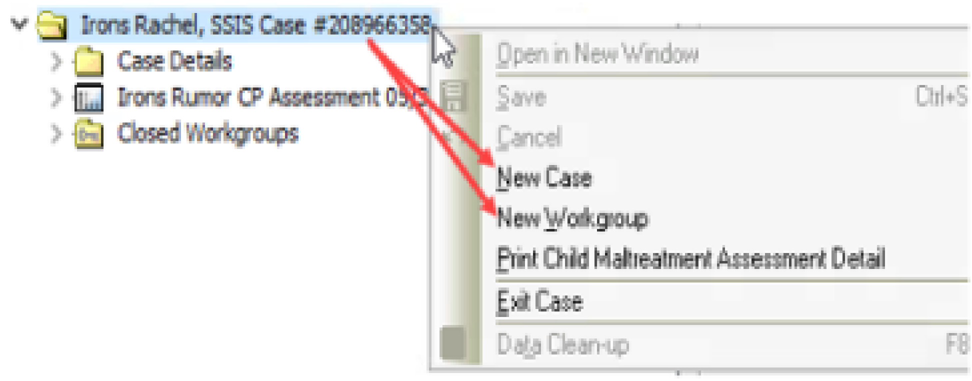
Hints:

- *Search for a preexisting case before creating a new Case to ensure the Associated workgroups folder properly displays all workgroups for a client/family.*
- *Occasionally workgroups are created in a new case when they should have been added to an existing case. To transfer a workgroup from one case to another refer to the Workgroup Transfer to Case job aid, located on the SSIS Resource page under SSIS Worker Documentation.*

Intake Workgroup>Action Menu



Case Details Folder>Action Menu



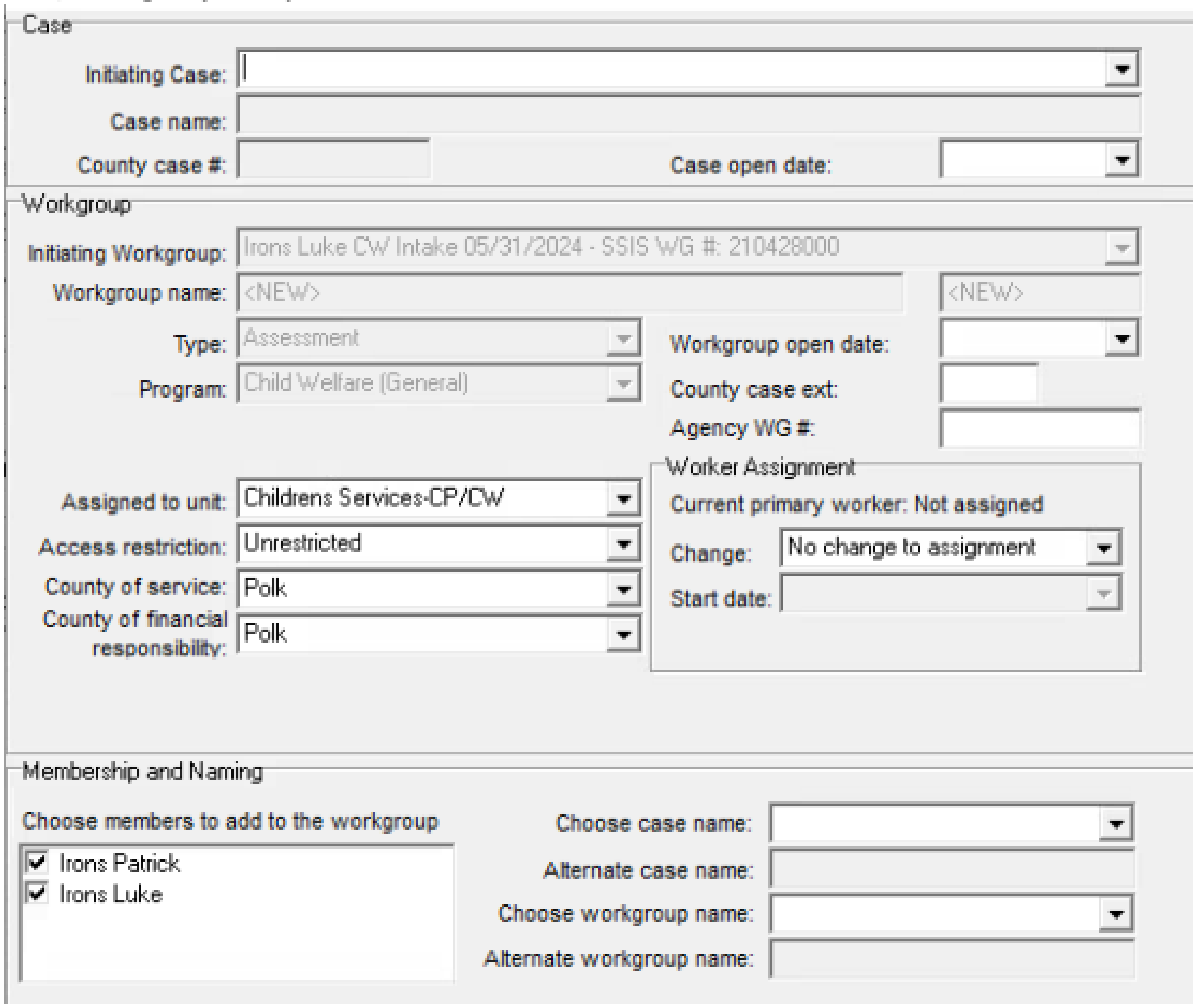
Access the **Open Case Workgroup Setup** screen:

- From the closed Intake Workgroup, A red icon displays on the intake node to indicate that the intake is closed but further action is needed to open the Case and the Assessment or Case Management Workgroups. Access the Action menu, and select **Open Case Workgroup Setup** (screen shot 1); or
- From the **Case Details** folder, access the Action menu, and select **New Case** or **New Workgroup** (screenshot 2).

The **Case/Workgroup Setup** screen contains three sections:

- The **Case** section gives us information about the Case. You can consider the case as the container for all the workgroups for these clients.
- The **Workgroup** section gives us information about that specific workgroup. You can have multiple workgroups under an existing Case.
- The **Membership and Naming** section is used to include or exclude members to a particular workgroup and/or case. This section also gives you the ability to name a new case and workgroup.

Case/Workgroup Setup



Field Name	Field Description/Use
Initiating Case	Defaults to **<NEW>** and appears as a greyed-out unless a case already exist. If a client has an existing case, this will enable the drop-down menu to display a list of cases associated with the clients**.** You must choose either **<NEW>** or an existing case from the drop-down options to associate to the Intake Workgroup. To associate the Intake workgroup, be sure to select an existing case. ***Hints:*** • *When there are multiple cases for the client's name, notify your SSIS mentor so the mentor can merge the cases before making your selection if needed. Sometimes there is a business need to have separate cases. But, for the most part, users should select one singular case to associate workgroups to.* • *Select <New> when a case does not exist or it has been determined a new case is needed, such as after TPR when moving to A/G workgroup.*
Case Name	The **Case name** autofills depending on our selection in the **Initiating Case** field. When this field is enabled, the choices of both **<New>** and other case names are available.

Field Name	Field Description/Use
	Hint: *Naming conventions may differ across agencies. The recommendation for naming a child welfare or child protection case is to select the name of the female head of household from the Choose Case Name field. If there is no female head of household, select the name of the male head of household. If neither, select the name of the oldest child.*
County Case #	Use the **County case #** field to maintain your agency's previous numbering system. Contact your Agency's SSIS mentor to see if you use this field, it is not a mandatory field.
Case open date	If it is a new case, the **Case open date** field can be dated. Use the date picker, or type in the date to open the case. ***Hint:*** *This date autofills if the worker selects an existing case from the Initiating Case field.*
Initiating Workgroup	When creating from the Intake Workgroup, the **Initiating Workgroup** field is greyed-out and defaults with information from the **Description** field of the intake workgroup. When creating from Case Details folder, the **Initiating Workgroup** field may default to another workgroup if a workgroup other than an intake was the only previous workgroup in the case; or when there are multiple workgroups in the case, the worker would need to choose which workgroup is initiating.
Workgroup name	The **Workgroup name** field defaults to **<NEW>** when creating from an Intake Workgroup. When creating the workgroup from another workgroup or the case level, use the drop-down menu to select the appropriate Workgroup name.
Type	The **Type** field defaults to **Assessment** when you select **Open for Assessment-Intake complete** or **Refer to Current Workgroup- Intake complete** from the **Disposition/Close** field in Intake. When creating the workgroup from another workgroup or the case level, use the drop-down to select the appropriate type of workgroup.
Program	The **Program** field defaults to the program area chosen in the intake. When creating the workgroup from another workgroup or the case level, use the drop-down to select the appropriate Program.
Workgroup open date	The **Workgroup open date** cannot precede the **Case open date**
County case ext.	Contact your Agency's SSIS Mentor or Supervisor to determine if your agency uses the **County case ext.** field.
Agency WG #	The **Agency WG #** field is not a mandatory field. Check with your agency SSIS Mentor or Supervisor on how to use this field.
Assigned to unit	The **Assigned to unit** drop-down list shows all the units within your agency. Choose the unit that is appropriate for your workgroup.

Field Name	Field Description/Use
Access restriction	Once you select a unit, a default setting displays in the **Access restriction** field. This is a security function set up by your Agency's SSIS administrator. If this workgroup needs a different level of access, change it here. The **Access restriction** options: • **Assigned worker**- Use caution because the assigned worker is the only agency staff with access to the workgroup. • **Department**- Any worker in the same department as the assigned worker will have access to the workgroup. • **Unit**- Any worker in the same unit as the assigned worker will have access to the workgroup. • **Unrestricted**- Any worker in the Agency with access to SSIS will have access to the workgroup.
County of service and **County of financial responsibility**	The **County of service** and the **County of financial responsibility** fields default to your agency. Usually these fields are the same, but the **County of financial responsibility** could be different from the **County of service.** These fields are editable. Workers should review and update for accuracy, as applicable.
Worker Assignment	**Worker Assignment** displays the sentence, **Current primary worker Not assigned** and will autofill with the staff's name if Self-assigned is selected from the **Change** field.
Change	Use the **Change** field to select how to assign a worker to this workgroup. The **Change** field defaults to **No change to assignment**. Select **No change to assignment** to have the workgroup automatically routed to the **Assignment Log** for worker assignment. Otherwise, select **Self assign** and the primary worker's name autofills in the **Worker Assignment** field. ***Hint: You must have a staff** assigned to the workgroup to view the workgroup folders.*
Start Date	The **Start date** field autofills with the date and time the worker selects **Self Assign** in the **Change** field. ***Hints:** The Start date is editable. However, it cannot be a future date, precede the Case open date, or precede the Workgroup open date.*
Choose members to add to workgroup	Client participants from the initiating workgroup display in this field. Check the clients to include or uncheck clients you do not want to include in the new workgroup. ***Hint:** The alleged victim, reporter (unless anonymous), and alleged offender names are disabled in child protection or adult protection workgroups because these roles must be included in the workgroup.*
Choose case name	Use the **Choose case name** field to select one of the participants as the case name. If you select a case name in the **Initiate Case** field the case name autofills. Select **Alternate Name** to enable the **Alternate case name** field, which allows you to type a different case name. For example: in a Facility CP assessment where the facility's name is used as the case name. Select **Alternate Name** and type the

Field Name	Field Description/Use
	facility's name in the **Alternate case name** field. ***Hint:*** *Naming conventions may differ across agencies. The recommendation for naming a child welfare or child protection case is to select the name of the female head of household from the Choose case name field. If there is no female head of household, select the name of the male head of household. If neither, select the name of the oldest child. Follow your Agency's naming convention.*
Alternate case name	The **Alternate Case name** is a free text field that allows you to type the case name. To enable the **Alternate case name** field, select **Alternate Name** in the **Choose case name** field.
Choose workgroup name	Use the **Choose workgroup name** field to select the primary person of this workgroup. This person's name becomes part of the workgroup's name. Select **Alternate Name** to enable the **Alternate workgroup name** field, which allows you to type a different name for the workgroup. For example: in a Facility CP assessment where the facility's name is used as the workgroup name. Select **Alternate Name** and type the facility's name in the **Alternate workgroup name** field. ***Hint:*** *Follow your Agency's naming convention.*
Alternate workgroup name	The **Alternate workgroup name** is free text field that allows you to type the workgroup name. You can use this for all workgroup types and in situations where the name of the client is not appropriate as the workgroup name. *Hint: This field is used in the same fashion as the Alternate case name field. Follow your Agency's naming convention.*

To Complete the Case Workgroup Setup Screen:

1. From a closed intake that is closed with reason of **Open for assessment** or **Open for case management**, access the Action menu and select **Open Case Workgroup Setup**; From any assessment or case management workgroup, access the Action menu and select **Open with Case in a New Window**, then right-click on the case level and choose **New workgroup**; From the **Case Details** folder, access the Action menu and select, **New Case** or **New Workgroup**; or From the Intake Workgroup or Intake Searches>Unassigned Intakes folder and access the Action menu and right-click on the desired Intake Workgroup and select **Open Case/Workgroup Setup**.
2. Select the case name or **<NEW>** from the **Initiating Case** drop-down menu.
3. The **Case name** and **Case open date** fields autofill with the information from when the original case was created. If the Case open date is blank, enter the start date in the **Case open date** field.
4. Select the actual date of the **Workgroup open date** field.
5. Select **Self assign** or **No change to assignment** from the **Change** drop-down.
6. The **Start date** field defaults to the time and date of the selecting self-assigned but is editable.
7. Select a client from the **Choose Case name** drop-down.
   or
   Select **Alternate name** from the **Choose workgroup name** and type the desired case name.
8. Select a client from the **Chose workgroup name** drop-down
   or
   Select **Alternate name** from the **Choose workgroup name** and type the desired workgroup case name.

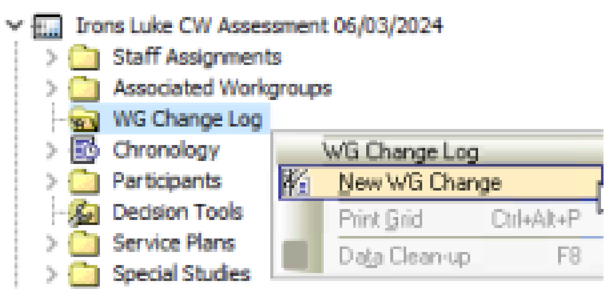
9. Click **OK** to save or Click **Cancel** to close.

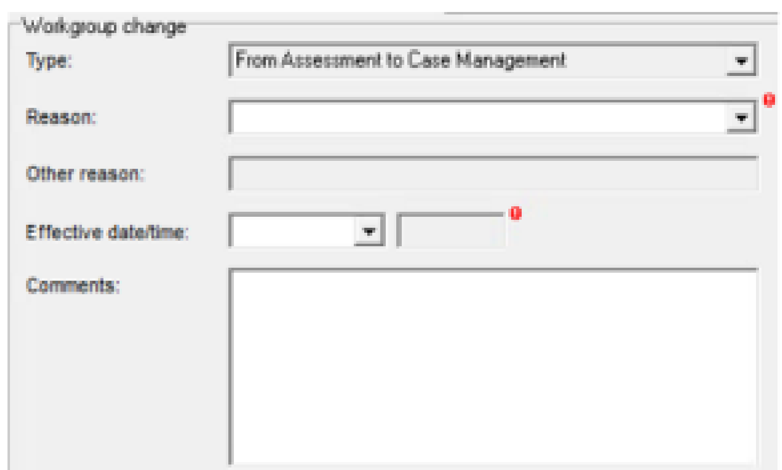
Workgroup Change Log Folder

Use the Workgroup Change Log to transition a workgroup between different types (such as assessment into case management). For example, a workgroup can be transitioned from Assessment to Case Management. Transitioning a workgroup this way allows for all historical workgroup information, such as workgroup number, Case Notes and Service Plans to move the new workgroup. The previous information is available for continued service coordination. All associated workgroups are located under the Associated Workgroups folder in the Tree View.

Hint: *All associated workgroups from the same case will show under the associated workgroups folder. Some workgroups associated with the client may not be associated to the same case.*

WG Change>New WG Change Log





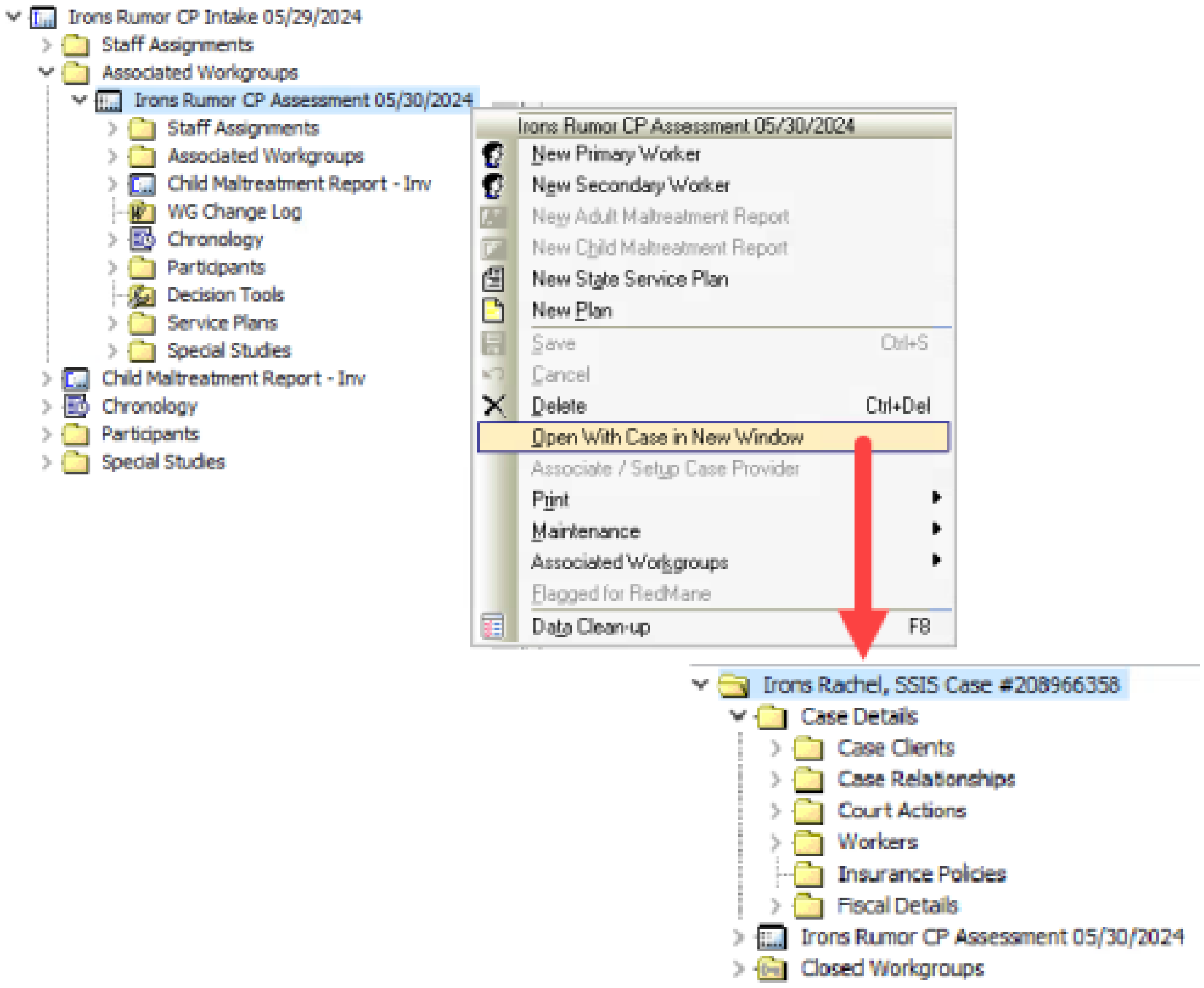
To Transition a Workgroup:

1. Right-click on the **WG Change Log** folder and select **New WG Change**.
2. Select the workgroup's transition from the **Type** drop-down menu.
3. Select the reason for the change from the **Reason** drop-down menu. If the reason is "Other", enter a reason in the **Other reason** field.
4. Enter the effective date of the change in the **Effective date/time** field.
5. Enter **Comments**, if applicable.
6. **Save.**

Case Details Folder

The **Case Details** folder contains information about the entire case, including all associated workgroups both opened and closed. Functional features within this folder allow users the option to review, add, or create copies/duplicate records in each of its folders for anyone associated to this case. Using the copy feature from this folder is a time saver, especially if users need to enter court actions, service arrangements, payments, or insurance policies for multiple participants.

Workgroup Level Action Menu>Open With Case in New Window>Case Detail Folder



To Open Case Details Folder

1. Select **Open With Case in New Window** to view the Case Details folder.
2. Expand the **Case Details** folder to view the **Case Clients**, **Case Relationships, Court Actions, Workers, Insurance Policies, and Fiscal Details** sub-folders.

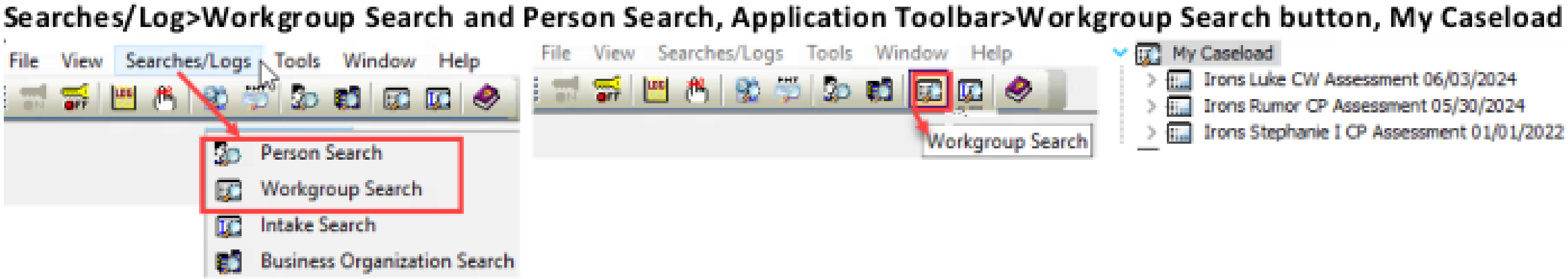
Field Name	Field Description/Use
Case Clients	Case Clients folder displays the names of all clients in all of the workgroups associated with this case.
Case Relationships	Case Relationships folder displays all client relationships entered in SSIS.
Court Actions	Court Actions folder displays all court activity documented in the Case and Workgroup(s). Court actions entered in the Case Details folder, display under the corresponding client's Court Actions folder.
Workers	**Workers** folder contains Statewide Access information requested from another county regarding a specific workgroup or clients, and contains workers assigned to the case
Insurance Policies	The **Insurance Policies** folder contains third-party insurance policy information regarding the clients associated with the case. New insurance policies can be created from this folder. Existing insurance policies can also be edited from this folder.

Field Name	Field Description/Use
	Hint: *Medical Assistance (MA) policy information is not entered in this folder. MA information can be viewed from a client's Eligibility folder. MA information is transmitted to SSIS from MMIS.*
Fiscal Details	The **Fiscal Details** folders: • **Service Arrangements** – Serves as a template for payment of services arranged. Payment for services are approved by supervisors and paid for once approved by accounting. • **Service Agreements** – Acts as a contract between a vendor and the agency. One or more Services Arrangements can be associated with a Service Agreement. Service Agreements are set up for a single client or a single vendor and can be printed and used for signatures. • **Payments** – Displays payments made to service providers. • **Healthcare Claims** – Displays claims in any workgroup in which the client has an association. Claiming provides a means to validate and correct potential claims, create claim batches, submit the claims to the agency's MNITS mailbox, and process from Medicaid Management Information System (MMIS). • **Child Foster Care Claims –** Displays claims in any workgroup in which the client has an association. Claiming provides a means to validate and correct potential claims, create claim batches, submit the claims to the agency's MNIT mailbox, and process from Medicaid Management Information System (MMIS). • **RCA Claims** - Displays claims in any workgroup in which the client has an association. Claiming provides a means to validate and correct potential claims, create claim batches, submit the claims to the agency's MNITS mailbox, and process from Medicaid Management Information System (MMIS). ***Hint*** *Only a couple of agencies are currently using this legacy option as RCA payments have been replaced with NorthStar Kinship Assistance.* • **RCA Payment Worksheets -** Serves as a template for payment of services arranged. A template to calculate RCA payments

Workgroup Overview

Workers can view a workgroup by conducting a **Workgroup Search** or **Person Search** or by selecting a workgroup from **My Caseload** in the Tree View.

Searches/Log>Workgroup Search and Person Search, Application Toolbar>Workgroup Search button, My Caseload



Reminder: *The workgroup detail panel displays information entered on the* ***Open Case/Workgroup Setup*** *screen.* The subfolders beneath the Workgroup folder contain additional information about the workgroup:

- **Staff Assignments**- Displays a history of assigned workers.. This folder also contains Statewide Access that allows workers to request access to workgroups opened at another agency.
- **Associated Workgroups**- Displays within each workgroup, lists all workgroups in the same case, along with initiated or referred intakes. ***Best practice:*** *Agencies should keep all workgroups in one case, when possible, and choose the existing case rather than New when setting up a new workgroup. This ensures all workgroups appear under the Associated workgroups folder in each workgroup. Exceptions to this are Adoption/Guardianship and Licensing workgroups which must have their own cases. Always check with your SSIS mentor or coordinator prior to making changes to current practice.*
- **Child Maltreatment Report** - Displays all Child Maltreatment Reports associated with a particular client. If this were an Adult Protection Services workgroup, the Adult Maltreatment Report would display instead of the Child Maltreatment Report.
- **WG Change Log**- Displays all the changes or transitions to a workgroup.
- **Chronology**- Used to record and manage workgroup information. Chronology is the central location within a workgroup to create, edit, delete, sort, and print Time/Activity entries and related case notes, documentation, reports, documents, Attached Files, and to review legacy documents.
- **Participants**- Contains information about all the individuals in a workgroup, including clients, collaterals, and professional collaterals. Information specific to a client is contained within that client's individual Client node.
- **Decision Tools**- Contains the Structured Decision Making (SDM) tools used to guide decisions in child welfare, child protection, and adult protection workgroups. This folder will only appear in workgroups with a program type that includes SDMs.
- **Service Plans**- Contains all Draft, Active, and Legacy service plans. Service plans made Inactive or Discarded are in the Closed folder beneath the Service plans folder. The 'closed' folder does not appear in the service plan folder unless there is one or more inactive/discarded service plans in the service plan folder. Hint: A Legacy service plans folder displays only if the workgroup contains plans created prior to 2000.
- **Special Studies-** Special Studies are used to identify a group of clients, workgroups, or staff, when there is a need to quickly identify them for an emergency, crisis (for example: Hurricane Katrina), or pilot study purpose. Special Studies can either be defined by the Department of Human Services or by an agency. If a user need be added to a special study system admins can add them to the study under the user profile tab labeled Special Studies.

Workgroup Search

The **Workgroup Search** screen allows workers to view their caseload, to search for other caseloads or specific workgroups and allows for searches of workgroups by child or adult maltreatment reports.

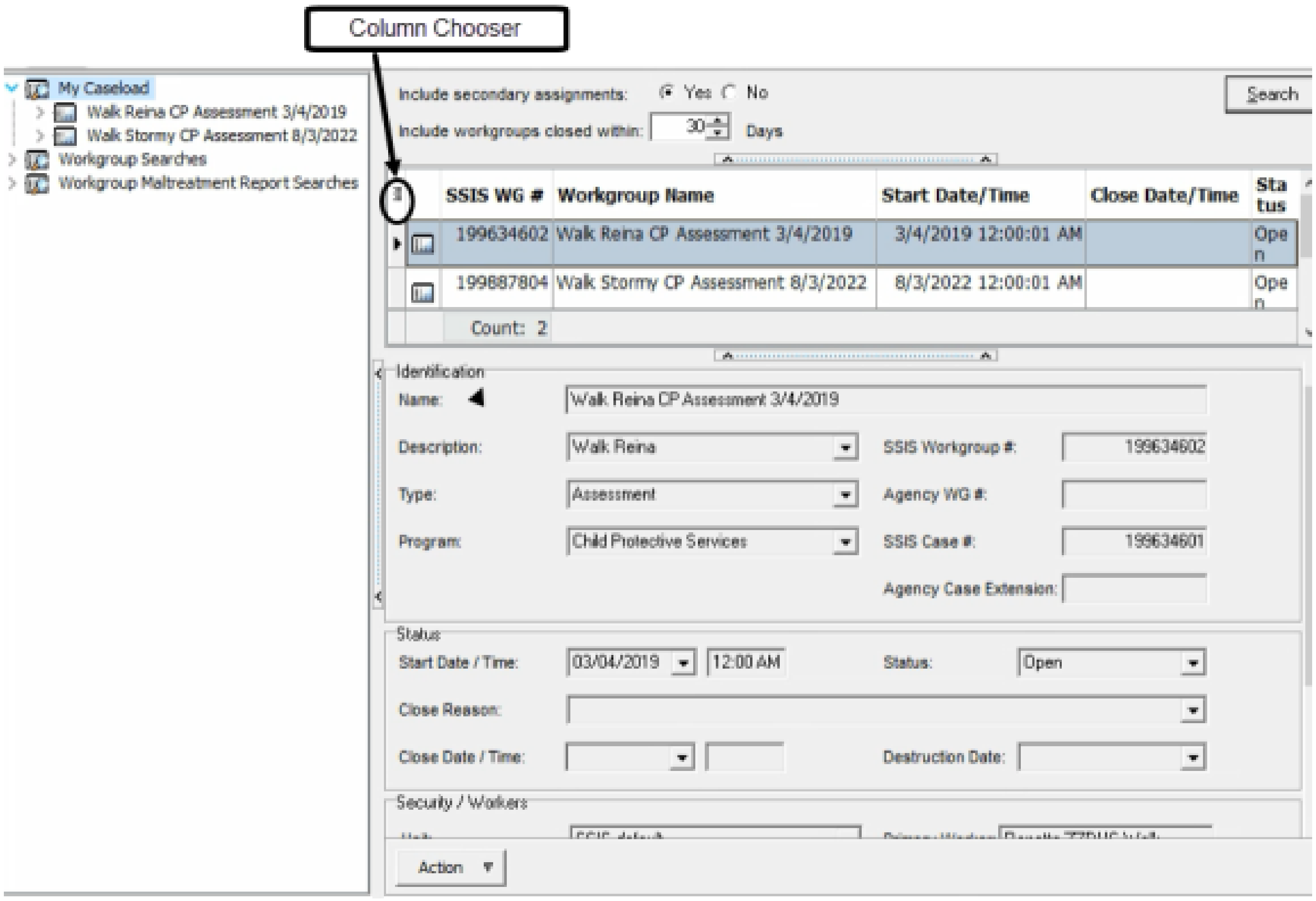
My Caseload

My Caseload is the first option in the **Workgroup Search** screen and is automatically highlighted upon selecting **Workgroup Search** under **Searches/Logs** or selecting the Workgroup Search Quick Access button on the Application Toolbar. The worker's current caseload appears in the search results grid and, by default, includes cases closed within 30 days as well as secondary assignments. The search can be modified to remove secondary assignments by selecting the **No** indicator next to include secondary assignments. It can be further modified by changing the number of days in the **Include workgroups closed within** field.

The **My Caseload** action menu provides options to create a list of the worker's caseload, inclusive of addresses and phone numbers for clients in the workgroup.

Hint: *Workers can use the column chooser to add or remove columns that display in the grid. Workers should click the Column chooser, then click the checkbox next to the column to add a column or remove a check from the checkbox to remove a specific column.*

My Caseload



To Access My Caseload

1. Open **My Caseload** screen by selecting **Searches/Logs** and choosing **Workgroup Search** or by clicking the Workgroup Search Quick Access button on the **Application Toolbar**.
2. Highlight **My Caseload** in the Tree View.
3. Highlight desired workgroup in the preview panel or Tree View.

To Print Caseload Addresses and Phones

1. Open **My Caseload** screen by selecting **Searches/Logs** and choosing **Workgroup Search** or by clicking the Workgroup Search Quick Access button on the application toolbar.
2. Highlight **My Caseload** in the Tree view.
3. Highlight desired workgroup in the preview panel.
4. Access the **Action Menu**
5. Select **Caseload Addresses and Phone.**

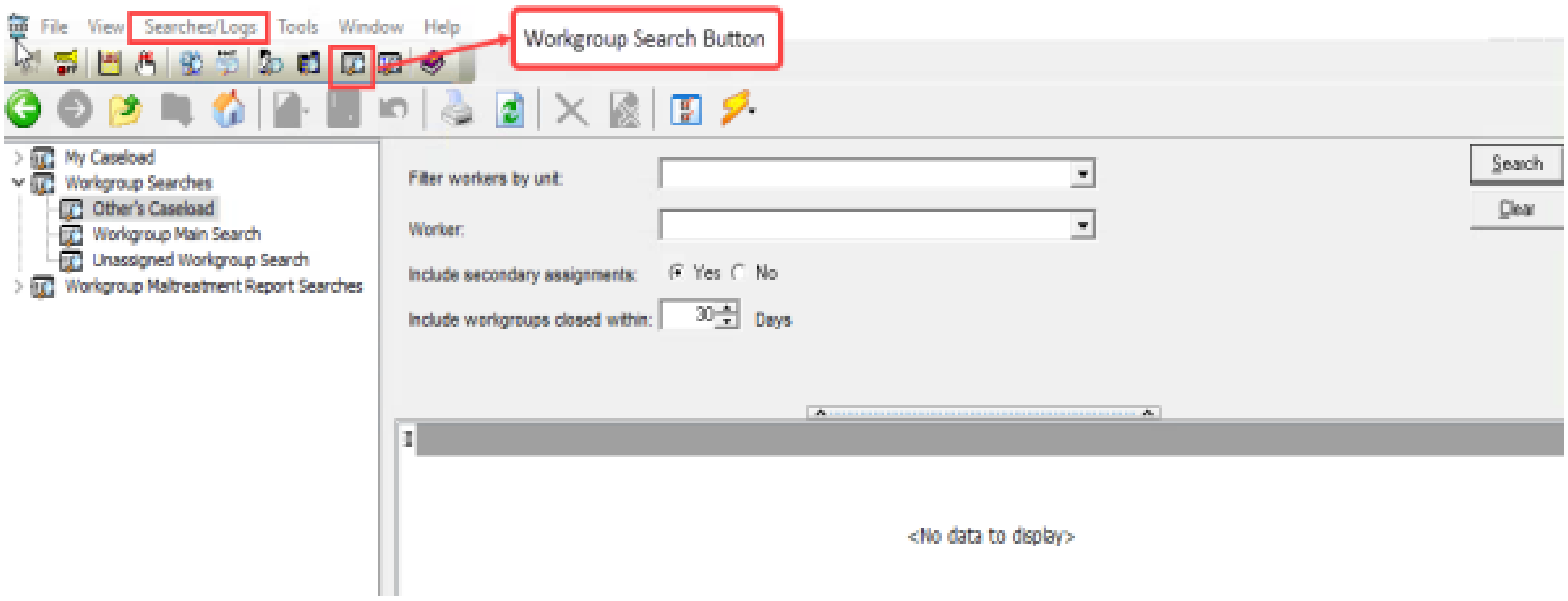
Workgroup Searches

Workgroup Searches contains three search options:

- Other's Caseload
- Workgroup Main Search
- Unassigned Workgroup Search

These searches, unlike **My Caseload**, allows you to access specific Assessment or Case Management workgroups as well as workgroups that are not assigned to you. These searches have more search criteria fields to search by. Each option can be viewed by either using the tabs above the search fields or by expanding and using the Tree View.

Tree View>Workgroup Search>Other's Caseload



Field Name	Field Description/Use
Filter by workers unit name	Allows you to filter the search results by units and then the workers assigned to the selected unit.
Worker	Allows you to search the caseload of by specific worker. Once you have selected a unit from the **Filter workers by unit** field, this field displays all the workers currently active in the unit.
Include secondary assignments	The search screen also displays the option of including the selected worker's secondary assignments. The Include secondary assignments option defaults to **Yes**. If you do not want to include the secondary assignments, select No. **Hint:** If you select Yes, the Primary Worker column in the search results displays Yes to indicate that you are the primary worker and No to indicate that you are assigned as a secondary worker. If this column does not display in the search results, use the column chooser to add Primary Worker column.
Include workgroups closed within	Allows a search of the worker's closed workgroups from 0 to 1000 days from the close date. You can select the number of days by using the up/down arrows or by typing the desired number in the box. The Include workgroups closed within option automatically defaults to 30 days.

To Complete the Other's Caseload Search:

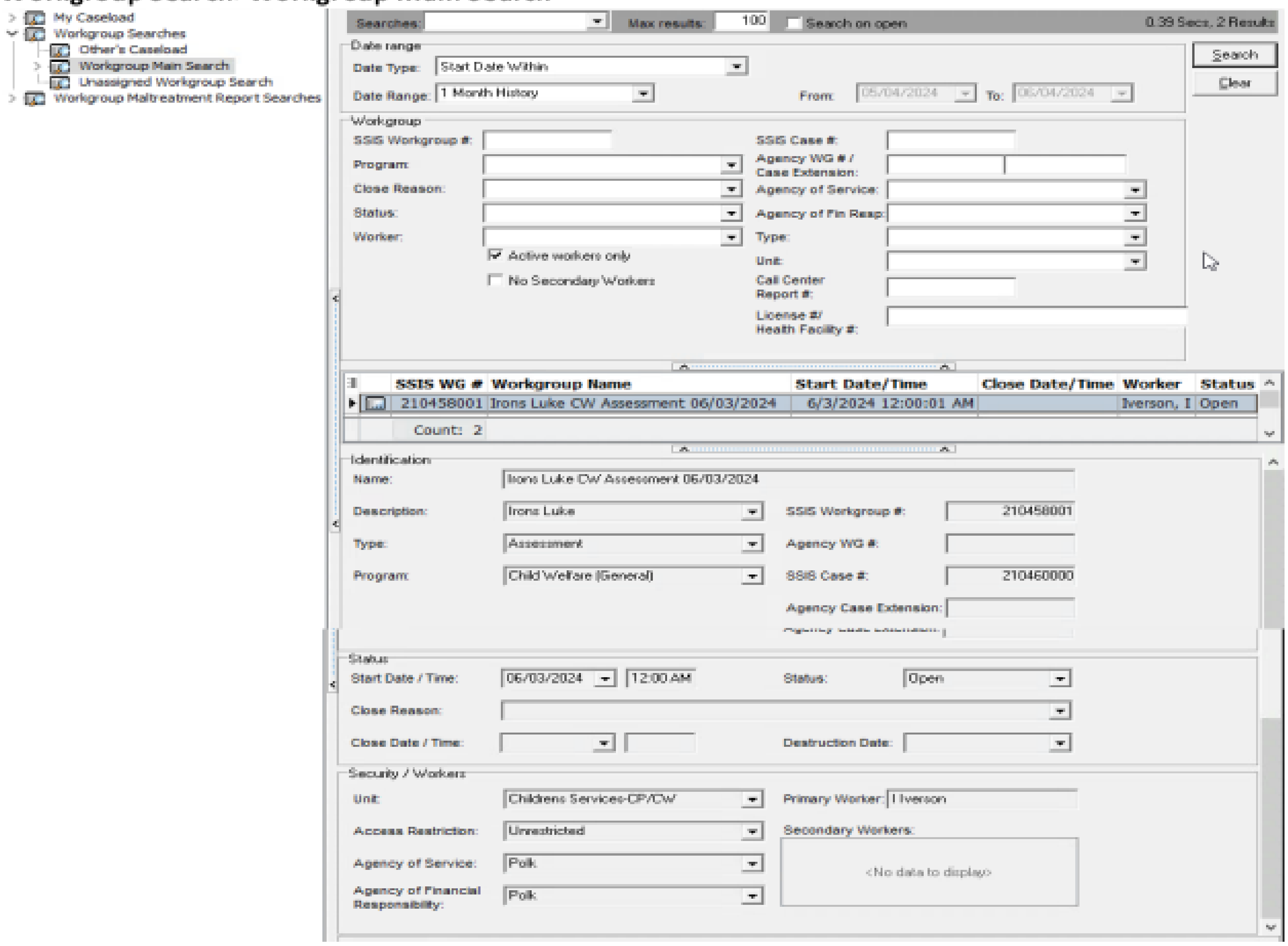
1. Open the **Workgroup Search** screen by selecting **Searches/Logs** and select **Workgroup Search** or by selecting **Workgroup Search** on the application toolbar.
2. Expand the **Workgroup Searches** in the Tree View.
3. Select desired Unit from the **Filter workers by unit** drop-down.
4. Select the desired worker in the **Worker** drop-down.

5. Select **Yes** or **No** to **Include secondary assignments**.
6. Select the number of days to **Include workgroups closed within** that timeframe.
7. Click **Search.**

Workgroup Main Search

The Workgroup Main Search tab allows the worker to perform a variety of workgroup searches, from broad to extremely defined.

Workgroup Search>Workgroup Main Search



To Complete a Workgroup Main Search

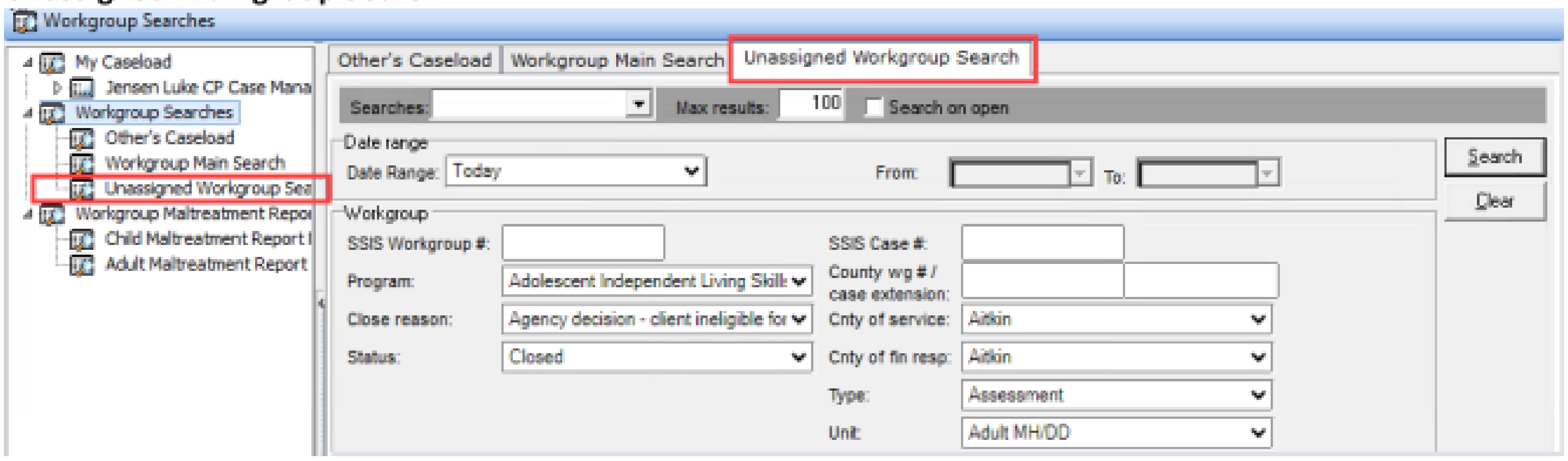
1. Open the **Workgroup Search** screen by selecting **Searches/Logs** and select **Workgroup Search** or by selecting **Workgroup Search** on the application toolbar.
2. Highlight **Workgroup Searches** in the Tree View.
3. Select the **Workgroup Main Search** tab.
4. Enter desired information in the drop-down boxes to filter your search criteria.
5. Click **Search**.

Unassigned Workgroup Search

The **Unassigned Workgroup Search** is used to find Assessment or Case Management workgroups that do not have an assigned worker. This can happen when a worker's assignment to an Intake workgroup has ended, and the workgroup has not yet been reassigned to another worker.

Agencies may have different policies and procedures for checking this search, so ask your mentor or supervisor for your agency's policy on assigning workgroups.

Unassigned Workgroup Search



To Complete an Unassigned Workgroup Search

1. Open the **Workgroup Search** screen by selecting **Searches/Logs** and selecting **Workgroup Search** or by selecting **Workgroup Search** on the application toolbar.
2. Expand the **Workgroup Searches** in the Tree View.
3. Highlight the **Unassigned Workgroup Search** tab on the detail panel or node in the tree view.
4. Enter desired search criteria.
5. Click **Search**.

Workgroup Maltreatment Report Searches

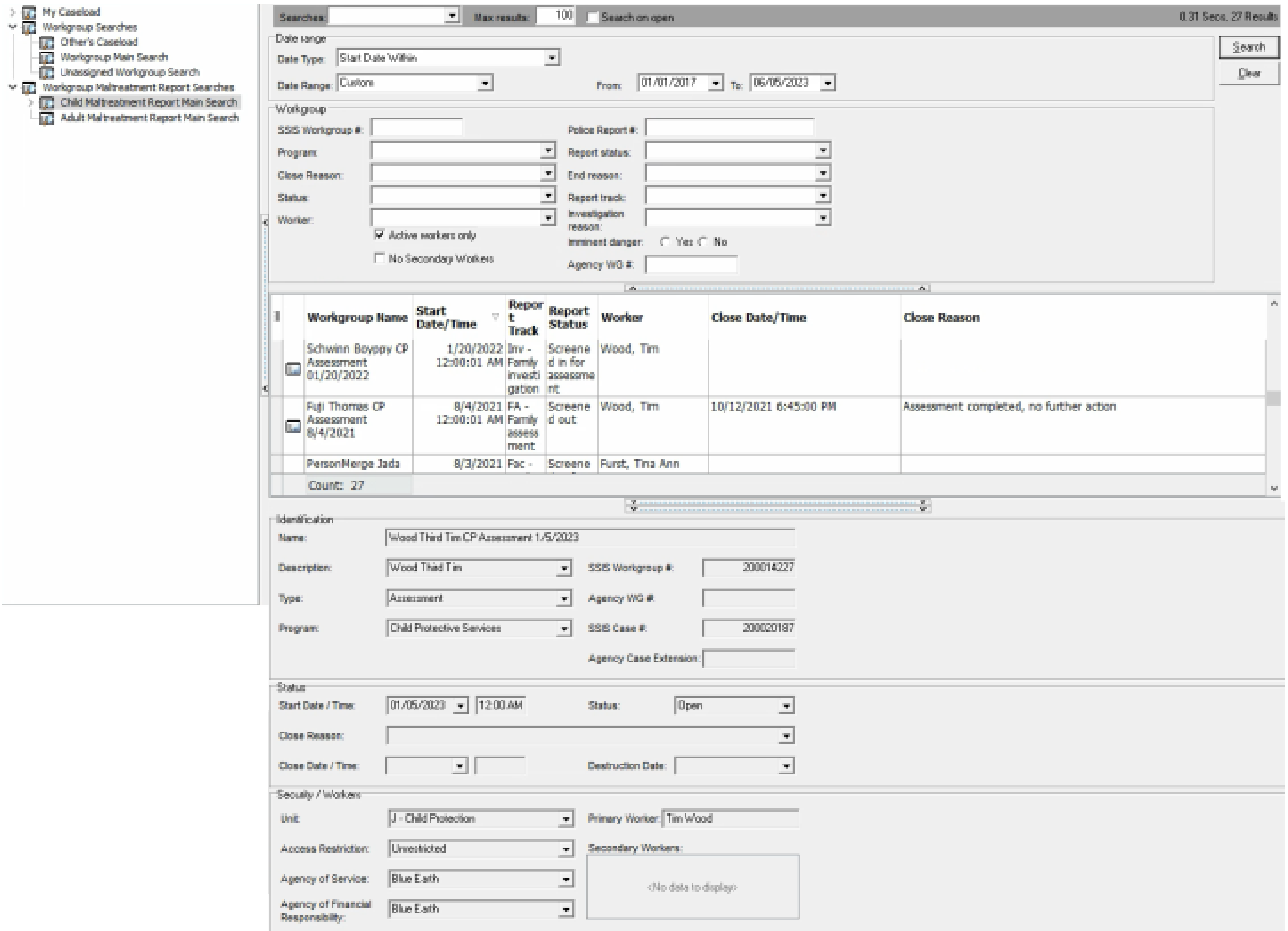
The **Workgroup Maltreatment Report Search** allows the worker to view a list of assessment and case management Child Protection (CP) and Adult Protection (AP) workgroups with the associated Child Maltreatment Report (CMR) and Adult Maltreatment Report (AMR). The **Maltreatment Report Searches** option is accessed under the Workgroup Search option in the Tree View.

Child Maltreatment Report Main Search

The **Child Maltreatment Reports Main Search** detail screen displays specific child protection workgroup information of the highlighted workgroup in the grid. The detail screen displays below the grid and can be pulled up/down using the splitter bars.

Hint: *The Adult Maltreatment Report Main Search contains similar search options.*

Workgroups Search>Workgroup Maltreatment Report>Child Maltreatment Report Main Search



To Conduct a Maltreatment Report Main Search

1. Open the **Workgroup Search** screen by selecting **Searches/Logs** and selecting **Workgroup Search** or by selecting **Workgroup Search** on the application toolbar.
2. Highlight Workgroup **Child Maltreatment Report Main Search** or **Adult Maltreatment Report Main Search** in the Tree View.
3. Enter desired Date Range by selecting preset range or by selecting custom and modifying the date using the date picker.
4. Enter desired information in the workgroup section drop-down boxes.
5. Click **Search**.

Close Workgroup

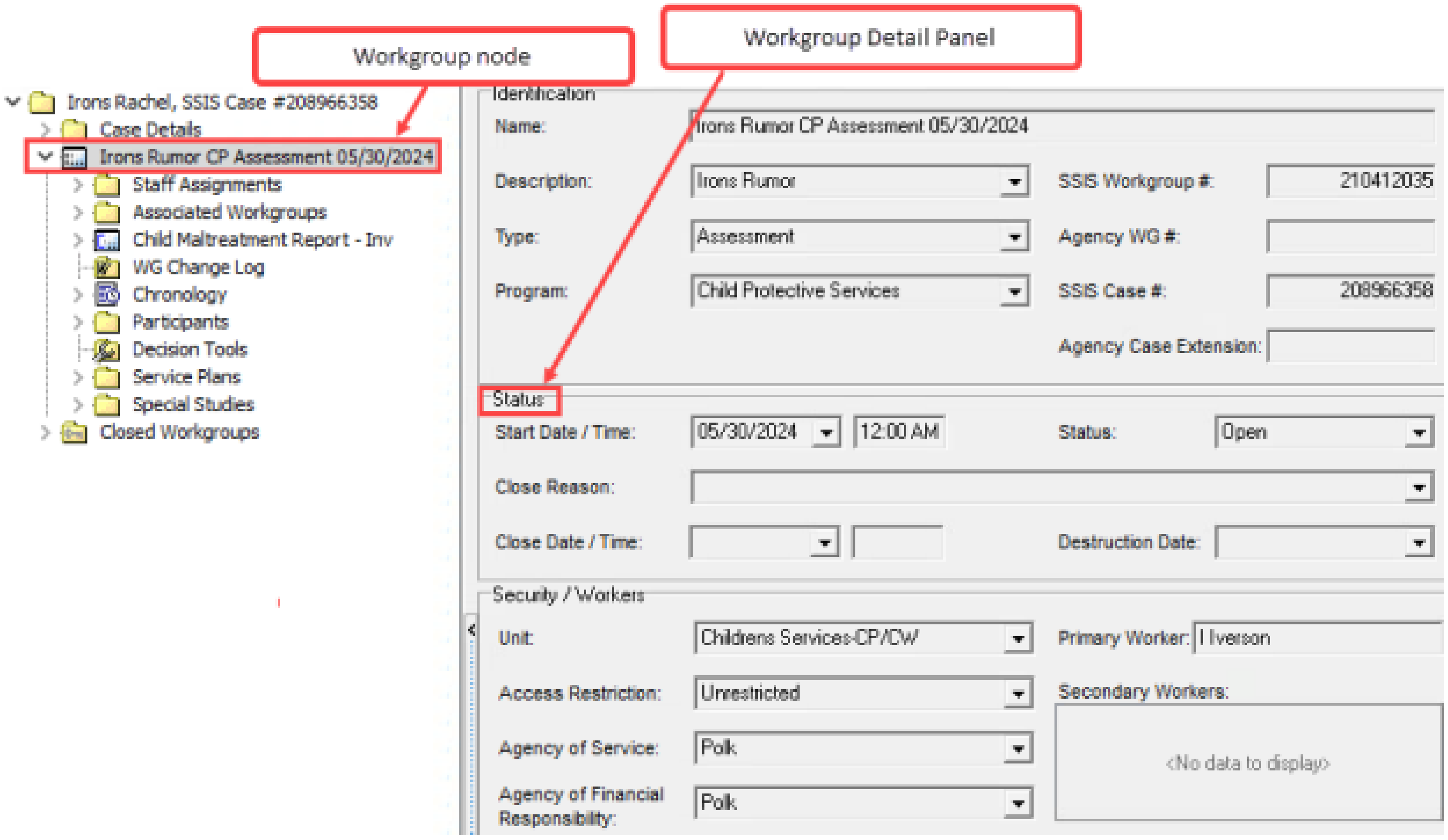
Workers may close a workgroup when services have ended, or for other reasons as deemed appropriate by your agency. To close a workgroup, you need to enter the date and reason for closing. Data Cleanup will identify missing data needed to close the workgroup and may prohibit the workgroup from being closed until the required information is entered. Once closed, the application automatically sets a destruction date.

Workers cannot edit information within a closed workgroup. However, workers can enter and edit individual Case Notes, Time Notes within Contacts/Activities, Documents, and Documentation up to 30 days after the workgroup is closed.

Once closed, the workgroup is moved to the Closed Workgroups folder and remains on your caseload list for 30 days.

The Destruction date is a system-generated date based on parameters set up by the agency's System Administrator and SSIS system rules. The Destruction date only autofills after the workgroup is closed.

Workgroup Detail Panel



To Close a Workgroup:

1. Highlight the Workgroup folder and click on any field in the Detail. section.
2. Select a close reason from the **Close reason** drop-down menu.
3. Enter a close date and time in the **Close date/time** fields.
4. Click **Save**.

Hint: *When the Close date/time field is disabled after selecting the Close reason, this indicates that there is data cleanup that must be completed before closing the workgroup. To access Data cleanup, Right-click on the workgroup in tree view and choose Data cleanup to view what missing information is required before the worker can close the workgroup.*