



OFFICE OF POLICY, PROCEDURES, AND TRAINING

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POLICY BULLETIN #21-41-SYS

ACTIVITY AND GENERAL INFORMATION EXCHANGE (ANGIE) VERSION 1

<p>Date: June 14, 2021</p>	<p>Subtopic(s): POS</p>
	<p>Purpose:</p> <p>This policy bulletin is to inform Non Cash Assistance Supplemental Nutrition Assistance Program (NCA SNAP) Center staff that the new Activity and General Information Exchange (ANGIE) system replaces the Classic POS reports, queues and action menus used to assign work to SNAP Staff. It will migrate into production on July 12, 2021. Descriptions of ANGIE can be found in the attached release notes (Attachment A-Overview Document for ANGIE), (Attachment B – Eligibility Specialist), (Attachment C – Supervisor), (Attachment D – Manager), (Attachment E – Regional Manager/Business Administrator) and (Attachment F – Glossary Document)</p> <p>These release notes can also be found on the HRA Intranet at: http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx</p> <p><i>Effective July 12, 2021</i></p> <p>Attachments:</p> <p>Attachment A Overview Document for ANGIE Attachment B Eligibility Specialist Attachment C Supervisor Attachment D Manager Attachment E Regional Manager/Business Administrator Attachment F Glossary Document</p>

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 3 at the prompt followed by 1 or
send an e-mail to *FIA Call Center Fax* or fax to: (917) 639-0298

Attachment A

Overview Document for ANGIE

ANGIE Documentation

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1. Project Overview

The Activity and General Information Exchange (**ANGIE**) replaces the Classic POS reports, queues and action menus used to assign work to SNAP Staff. ANGIE is a workforce management and task assignment tool to achieve the following goals:

- Citywide processing, including universal processing for workers and supervisory staff, electronic case management and task assignment based on priority dates.
- Case management system modernization and integration with Streamlined POS (SPOS)
- Management strategies, including management structure, pivot staff, one touch processing, managing to in-flow versus out-flow and managing work coming due.

Release 1 targets the implementation of task prioritization and assignments for Application, Recertification, Case Change and Document Review actions for FIA SNAP operations staff, along with the initial version of the Event Log, Workforce Management tools, Notifications, Reports and Dashboards.

2. User Roles in ANGIE

ANGIE will support the following user roles:

- Eligibility Specialist (ES)
- Supervisor
- Manager
- Regional Manager & Business Administrator
- Reviewer

Role based dashboards will be displayed upon login to ANGIE.

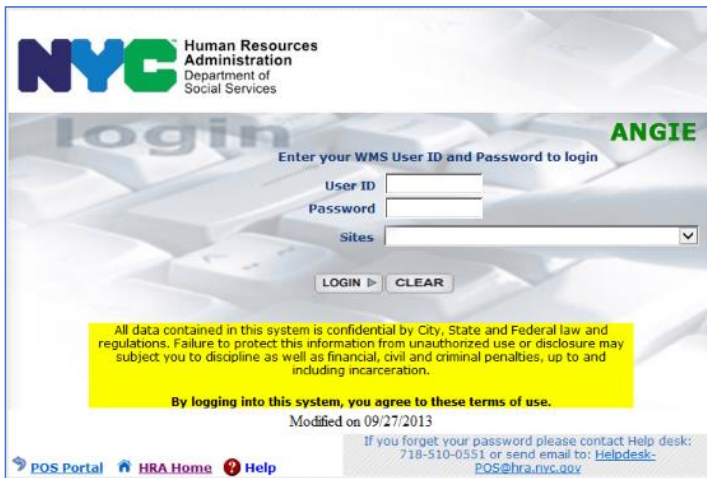
3. Log into ANGIE

A new link named **ANGIE** will be added to the POS Portal as seen below.

Attachment A Overview Document for ANGIE
Release 1 Notes



- Upon selection of the link the login page will display. The login page will require the Eligibility Specialist, Supervisor, Manager, and Regional Manager to enter their Welfare Management System (WMS) ID and password, followed by the selection of their designated center.



Upon successful login, the Eligibility Specialist, Supervisor, Manager, and Regional Manager will be displayed the corresponding dashboard specific to the role.

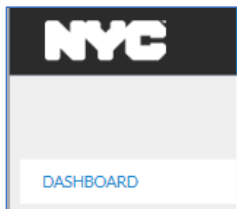
4. ANGIE Header

ANGIE header displays the system name as **ANGIE, Welcome message** showing the name of the respective Eligibility Specialist, Supervisor, Manager, or Regional Manager, and the **Tools menu**.



5. Left Navigation Pane

Based on the Role and the Skillsets/Permissions granted to the role, the accessible pages are displayed on the left navigation pane. The Eligibility Specialist, Supervisor, Manager, and Regional Manager can easily navigate between pages upon selection. All ANGIE roles will have a default dashboard page as the landing page upon login to ANGIE.



6. ANGIE Widget – Header Layout

The widget will contain the name/title of the respective widget. Where applicable, at the title level of the widget will also contain the following:

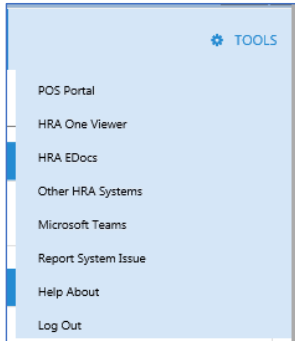
- **Widget Name:** The name of the respective widget will be displayed.
- **Last Updated:** Last updated timestamp on when the data was last updated in the format: **Last Updated: mm/dd/yy hh:mm AM/PM**
- A refresh button, if applicable, to refresh the data within the widget. Consequently, the last updated timestamp will also be updated. For some widgets, there will not be a refresh icon.
- A button to minimize or maximize the widget.



7. Tools Menu

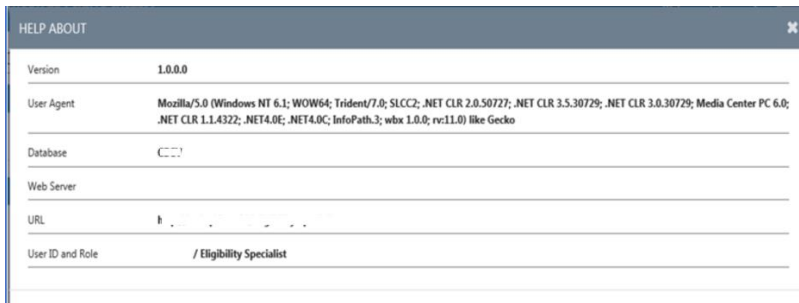
ANGIE has a **Tools** menu that includes links to the Paperless Office System (POS) Portal, Human Resources Administration (HRA) One Viewer, Department Social Services (DSS) eDocs, Other HRA Systems, Microsoft Teams, Report System Issue, Help About and Log Out.

Attachment A Overview Document for ANGIE
Release 1 Notes



8. Help About

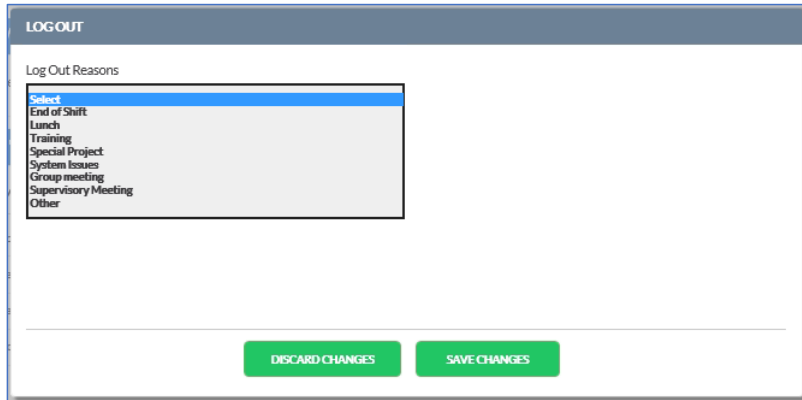
- From the **Tools** menu, selecting the Help About option will provide additional technical information to the respective Eligibility Specialist, Supervisor, Manager, or Regional Manager, when reporting system issues. This includes the Version, User Agent, Database Web Server, URL, User ID and Role.



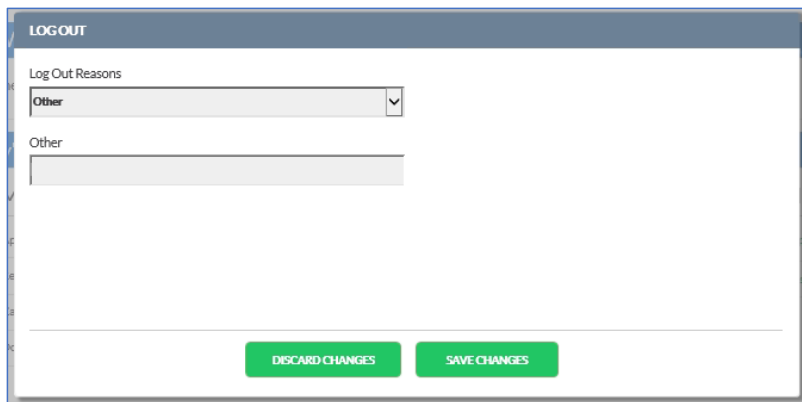
9. Log Out from ANGIE

- To log out from ANGIE, the Eligibility Specialist, Supervisor, Manager, and Regional Manager are required to select the Log Out option from the **Tools** menu. Upon selection, a modal window with the list of available Log out Reasons will be displayed. Log out reasons include End of Shift, Lunch, Training, Special Project, System Issues, Group Meeting, Supervisory Meeting, and Other.

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- If **Other** is selected, the Eligibility Specialist, Supervisor, Manager, and Regional Manager roles must manually enter the specific reason within the **Other** field.
- Selecting **Save Changes** will successfully log out of ANGIE.



Users are logged out automatically after 15 minutes of inactivity, with a logout reason of **Time Out**.

10. Task Assignments in ANGIE

ANGIE logically groups the work for SNAP into four types of tasks:

- Application – Cases in Applying (AP) or Single Issue (SI) status in WMS
- Recertification – Cases that must complete a recertification interview
- Case Change – Cases in Active (AC) status that submit changes
- Document Review – Cases in AC status that submit documents and do not have an open recertification or case change.

Universal Processing

Eligibility Specialists in ANGIE will work from a shared common list of ready tasks, which will be assigned by ANGIE based on priority dates and helps prevent backlogs. This universal processing pool of work removes the need to individually access in the queue to assess the readiness of the task.

Supervisors are pulling cases for sign-off from a general pool of available cases that need signoff based on the priority, and not just their own staff. It removes the need for supervisors to continually monitor queues, re-assign cases between Workers' queues, and re-assign cases between processing queues and Worker queues.

Applications

After applications are registered in WMS, they are tracked in ANGIE on the same day. The Eligibility Specialists will use ANGIE to start the required interviews in Streamlined (SPOS) for applicants.

After the interviews and expedited Supplemental Nutrition Assistance Program (SNAP) decisions are completed, ANGIE will track the readiness for cases with deferrals for document submissions and new matches, in order to assign the tasks based on the priority and due dates.

ANGIE will also track and assign the tasks for cases without deferrals and cases that fail to keep the required application interview.

Recertifications

Monthly lists of cases due for recertification are received from WMS and will be loaded into ANGIE. ANGIE will track the submission of the online recertifications and indexing of recertification forms that make cases ready for an interview.

The Eligibility Specialists will use ANGIE to start the required interviews in SPOS for recertifications.

After the interviews are completed, ANGIE will track the readiness for cases with deferrals for document submissions and new matches, in order to assign the tasks based on the priority and due dates. ANGIE will also track and assign the tasks for cases without deferrals, based on their priority.

Case Changes

ANGIE will track the submission of the online case changes and activities started by the Eligibility Specialists for cases in AC status. ANGIE will track the readiness cases with deferrals for document submissions and new matches, in order to assign the tasks based on the priority and due dates.

Document Reviews

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Release 1 Notes

ANGIE will track the submission of the documents for cases in AC status which do not have an open task in ANGIE. The Eligibility Specialists will be assigned the new Document Review activity to determine whether a case change is required based on the submitted documentation.

Approvals

For approvals, ANGIE will assign the tasks to the Supervisors based on the priority and due dates. Supervisors will receive cases for approval from the universal pool of processing completed by SNAP workers, based on the priority of the task. Approvals are no longer restricted to actions received from the specific Supervisor's team in the Supervisor's POS queue.

For managers, it removes the need to continually monitor processing queues, and re-assign cases between Supervisor queues.

Holding a task

ANGIE will allow staff to hold an assigned task for a period of two hours, by selecting a reason for the hold. This allows the staff person to return to the same task that was assigned. After two hours, the hold on the task is released for assignment to the next available staff person based on priority. This is covered in greater detail in the document for each role.

Returning a task

ANGIE will allow staff to return an assigned task on which they cannot work. The staff must select a valid reason from the list for the return. This is covered in greater detail in the document for each role.

11. SPOS Activity Integration

ANGIE will allow staff to start SPOS activities. Staff will no longer need to open Classic POS to access their assigned activities:

- The ES will start their processing activities through the **Get Next Case for Processing** button, which will assign the next highest priority processing task.
- The ES will start interviews and other activities through the **Case Search**.
- The Supervisors will start their approval activities through the **Get Next Case for Sign-Off** button, which will assign the next highest priority approval task from the general pool and is no longer restricted to the supervisor's own staff.
- The Managers and Regional Managers will monitor their units using dashboards and reports.
- A new SPOS activity named **Document Review** will be added to allow review of documents submitted between recertifications.
- A new **Event Log** will track activities and actions taken on a case, allowing the ES and Supervisor to view this information directly in SPOS, without needing to suspend the case action.

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- Staff enrollment will be handled by managers and business administrators in a new **Manage Staff** interface.

As interviews, processing tasks and approvals are completed in SPOS, ANGIE is updated with this information and the events are recorded. As milestones are reached, the task status and priority are continuously updated.

SPOS integration is covered in more detail in the release note documents for the Eligibility Specialist, Supervisor, Manager and Regional Manager.

12. SPOS Suspend Reason Integration with ANGIE Hold and Return

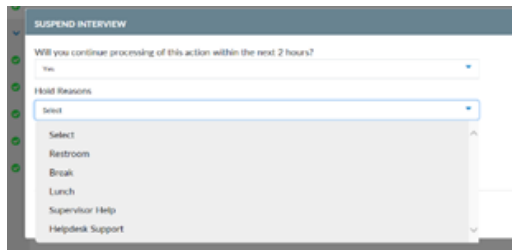
The **Suspend Reasons** dialog box in SPOS is integrated with ANGIE when the Worker or Supervisor suspends a case.

The Worker or Supervisor selects from a list of reasons when suspending a case to document the reason for suspending a case. The dialog box has the following text and options: **“Will you continue processing of this action within the next 2-two hours? [Yes or No].”**

The Worker or Supervisor indicates that they will continue the action

If the Worker or Supervisor indicates that they intend to continue processing the action in the next two hours, then SPOS displays the following hold reasons:

- Restroom
- Break
- Lunch
- Supervisor Help
- Helpdesk Support



Hold for Restroom, Break or Lunch in ANGIE

When the Worker or Supervisor suspends the case and selects a hold reason of Restroom, Break or Lunch, ANGIE will hold the case for up to 2-two hours:

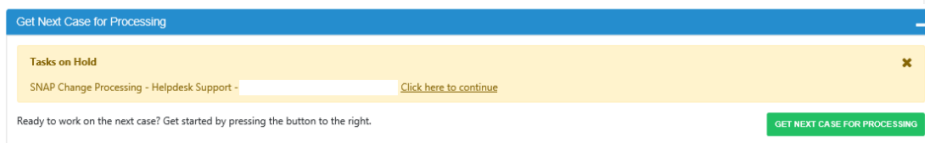
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- The Worker will click on the **Get Next Case for Processing** to return to the case. If the Worker does not return to the case, it will be available for assignment to a different Worker, based on the priority.
- The Supervisor will click on the **Get Next Case for Sign-Off** to return to the case. If the Supervisor does not return to the case, it will be available for assignment to a different Supervisor, based on the priority.

Hold for Helpdesk Support or Supervisor Help

When the Worker suspends the case and selects a hold reason of **Helpdesk Support** or **Supervisor Help**, a notification named **Tasks on Hold** will appear in the **Get Next Case for Processing** menu. This hold will be in place for up to 2-two days, to allow for resolution of the issue encountered by the Worker.

- To continue working on the case, the Worker will click on the **Click here to continue** link, which will make the case available when the Worker clicks **Get Next Case for Processing**.



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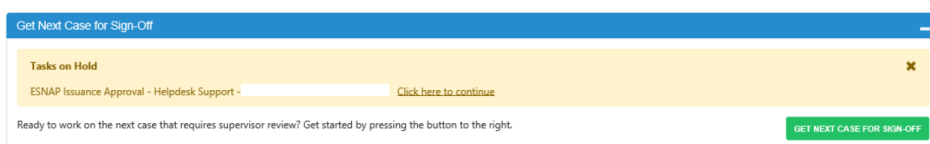
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When the Supervisor suspends the approval action in SPOS and selects a hold reason of **Helpdesk Support** or **Supervisor Help**, a notification named **Tasks on Hold** will appear in the **Get Next Case for Sign-Off** menu. This hold will be in place for up to 2-two days, to allow for resolution of the issue encountered by the Supervisor.

- To continue working on the case, the Supervisor will click on the **Click here to continue** link, which will make the case available when the Worker or Supervisor clicks **Get Next Case for Sign-Off**.



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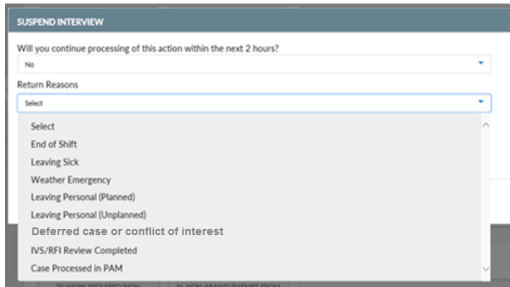
The Worker or Supervisor indicates that they will not continue the action

If the Worker or Supervisor indicates that they do not intend to continue processing the action within two hours, then SPOS displays the following return reasons:

- End of Shift
- Leaving Sick
- Weather Emergency

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- Leaving Personal (Planned)
- Leaving Personal (Unplanned)
- Deferred Case or Conflict of Interest
- IVS/RFI Review Completed
- Case Processed in PAM



When the Worker or Supervisor does not intend to return to the case, the task is returned to the virtual queue and business rules re-run to determine task readiness and priority.

Selecting a reason of IVRS/RFI Completed notifies ANGIE that the review IVS or RFI was completed by the Worker.

Selecting a reason of Case Processed in PAM puts assignments for the case on hold for 5 days, to allow for processing of the manual TAD. If the WMS changes are processed in this timeframe, the task may be removed by ANGIE. If the WMS changes are not processed in this timeframe, the task is again loaded for assignment based on readiness and priority.

Eligibility Specialist Role

ANGIE Release 1 Notes

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1. Document Objective

The objective of this document is to provide context on the Eligibility Specialist role within the Activity and General Information Exchange (ANGIE). The layout of the ANGIE dashboard for the Eligibility Specialist will allow the logical completion of the activities related to the role and consume the necessary information for the role.

2. Home Page: Dashboard for Eligibility Specialist

Upon login, the landing screen in ANGIE will be the **Dashboard** page. This screen will allow the Eligibility Specialist to view their progress, access their next priority task and search for cases. It will replace the individual's POS queue.

The screen includes the navigation bar on the left-hand side, the title bar with the Eligibility Specialist's name and the Tools menu and the main panel with the Eligibility Specialist's function, including collapsible widgets showing:

- **Your Work Counts!**
- **Today's Progress**
- **Get Next Case for Processing**
- **Case Search**
- **Daily Activity Sheet**

The widgets will contain the name/title of the respective widget. Where applicable, at the title level of the widget will also contain the following:

- **Widget Name:** The name of the respective widget will be displayed.
- **Last Updated:** Last updated timestamp on when the data was last updated in the format: Last Updated: **mm/dd/yy hh:mm AM/PM**
- A refresh button to refresh the data within the widget. Consequently, the last updated timestamp will also be updated.
- A button to Minimize or Maximize the widget.

Attachment B Eligibility Specialist Role
ANGIE Release 1 Notes

The screenshot shows a dashboard with the following components:

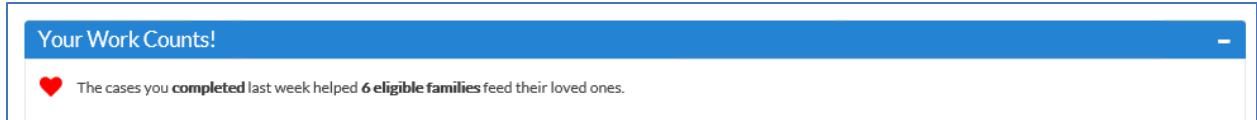
- Your Work Counts!**: A message stating "The cases you completed last week helped 6 eligible families feed their loved ones."
- Today's Progress**: A section with a refresh button and a timestamp "Last Updated: 10/20/2020 12:08 PM". It contains three sub-sections:
 - My Completed Cases**: A table with categories and counts: Applications (0), Recertifications (1), Case Changes (1), Document Reviews (0).
 - HRA Goal**: A section showing "Cases Due Today: 750" and "Backlog: 1531" with an upward arrow and "148". Below it, a warning icon and text: "2 Extra Cases per person today would put us on track to eliminate the backlog. It's a team effort. Thank you for doing your part!"
 - Need Support?**: A section with links for "Talk to your TEAM" and "Start a Help Desk Ticket".
- Get Next Case for Processing**: A section with a message "Ready to work on the next case? Get started by pressing the button to the right." and a green button labeled "GET NEXT CASE FOR PROCESSING".
- Case Search**: A section with a dropdown menu labeled "Select Search By Item".
- Daily Activity Sheet**: A table with a refresh button and a timestamp "Last Updated: 10/20/2020 12:08 PM". It includes a sub-header "Hours in System: 3 hrs 18 min". The table has columns for Status, Start Time, Case Number, Case Name, Start Event, WMS Status, End Event, Decision, HH Size, and Duration (Mins).

Status	Start Time	Case Number	Case Name	Start Event	WMS Status	End Event	Decision	HH Size	Duration (Mins)
✓	09:06 AM			Application - Start Interview	AP	Complete Interview - Deferred for Verification	AC-A30	6	40
⚠	09:48 AM			Application - ESNAP Processing	AP	Suspend Processing	AC-A30	6	22
✓	10:18 AM			Change Case - Change Case Ready	AC	Deferred/Pending Change Verification	AC-B32	4	21
⚠	10:42 AM			Application - Start Interview	AP	Suspend Interview	AP-	3	15
✓	11:04 AM			Recertification - Mandated Verification Received - Full	AC	Complete Processing	AC-A30	8	30
⌚	11:35 AM			Document Review - Start Document Review	AC	NA	AC-A30	5	-

3. “Your Work Counts!” & “Today’s Progress” Widgets for the Eligibility Specialist

The **Your Work Counts!** widget provides positive messages for the Eligibility Specialist, with information about how many families their work helped in the previous week (first message as seen below) and positive messages from applicants and participants. The positive messages are from clients and will be pulled from reviews of the Access Human Resources Administration (AHRA) mobile app in the App Store / Google Play store and also from the AHRA site. The comments will be alternating between the first message. The information displayed within this widget gets updated weekly.

- There will be a table with all possible messages that could be displayed from the sources mentioned. This would be a static table that would get refreshed periodically with a new list.
- Each time the Eligibility Specialist logs into ANGIE or returns to ANGIE from Streamlined Paperless Office System (SPOS), either the “The cases you completed last week helped X eligible families feed their loved ones.” or that day’s HRA message will be displayed. Selection will be random.



Today's Progress widget for the Eligibility Specialist consists of **My completed Cases, HRA Goal, and Need Support** sections. This widget keeps track of the daily progress.

The **My Completed Cases** section informs the staff regarding their completed cases for the day for **Applications, Recertifications, Case Changes and Document Reviews**.

The **HRA Goal** section provides information about **Cases Due Today** and **Backlog**:

- **Cases Due Today** displays all tasks with a Priority Date of Today.
- **Backlog** is displayed as the sum of tasks that are late and overdue.
 - Next to the backlog number, an arrow up (displayed in yellow) shows an increase in cases in the backlog since yesterday,
 - Arrow down (displayed in green) for a decrease in the backlog since yesterday,
 - No arrow at all (just the backlog number) for no increase or decrease in the backlog number. When there are zero cases in the backlog for more than one day, the number of days that the backlog has been zero will be counted.
 - This backlog comparison is comparing the start of day backlog number from yesterday to the start of day backlog number from today.
 - The backlog comparison will be calculated at 5:30am each day.
 - The backlog counts and comparisons will compare the current workday (business day) against the prior workday (business day). These numbers are not updated on weekends and holidays.
- Below the **Cases Due Today** and **Backlog** row, there should be text that switches between the following two messages based on the direction of the backlog change:
 - If backlog is increasing (arrow pointing up) the text will read: "2 extra cases per person today would put us on track to eliminate the backlog. It's a team effort. Thank you for doing your part!", the text will be preceded by an exclamation point in a yellow triangle
 - If backlog is decreasing (arrow pointing down) the text will read: "1 extra case per person today would put us on track to eliminate the backlog. It's a team effort. Thank you for doing your part!", the text will be preceded by a yellow blowhorn icon
 - Where there is no backlog for more than 1 day, text will be displayed as follows: "Don't lose our record! It's been X days with no backlog. If everyone meets their goal for today, we can keep the backlog at zero!", the text will be preceded by a green thumbs up icon.

Attachment B Eligibility Specialist Role
ANGIE Release 1 Notes

Screen showing an arrow up (displayed in yellow) when there is an increase in cases in the Backlog since yesterday

The screenshot shows the 'Today's Progress' dashboard. On the left, under 'My Completed Cases', there are four items: Applications (0), Recertifications (1), Case Changes (1), and Document Reviews (0). In the center, the 'HRA Goal' section shows 'Cases Due Today' at 750 and 'Backlog' at 1531, with a yellow arrow pointing up and the number 148 next to it. Below this, a message says '2 Extra Cases per person today would put us on track to eliminate the backlog. It's a team effort. Thank you for doing your part!'. On the right, under 'Need Support?', there are two links: 'Talk to your TEAM' and 'Start a Help Desk Ticket'.

Screen showing an arrow down (displayed in green) when there is a decrease in cases in the Backlog since yesterday

The screenshot shows the 'Today's Progress' dashboard. On the left, under 'My Completed Cases', there are four items: Applications (0), Recertifications (1), Case Changes (1), and Document Reviews (0). In the center, the 'HRA Goal' section shows 'Cases Due Today' at 750 and 'Backlog' at 1531, with a green arrow pointing down and the number 151 next to it. Below this, a message says '1 Extra Case per person today would put us on track to eliminate the backlog. It's a team effort. Thank you for doing your part!'. On the right, under 'Need Support?', there are two links: 'Talk to your TEAM' and 'Start a Help Desk Ticket'.

Screen showing when there are zero cases in the Backlog for more than one day, the number of days that the backlog has been zero are counted

The screenshot shows the 'Today's Progress' dashboard. On the left, under 'My Completed Cases', there are four items: Applications (0), Recertifications (1), Case Changes (1), and Document Reviews (0). In the center, the 'HRA Goal' section shows 'Cases Due Today' at 750 and 'Backlog' at 0. Below this, a message says 'Don't lose our record! It's been 10 days with no backlog. If everyone meets their goal for today, we can keep the backlog at zero!'. On the right, under 'Need Support?', there are two links: 'Talk to your TEAM' and 'Start a Help Desk Ticket'.

HRA Goal Help Text will be displayed when selecting the HRA Goal Help Icon as seen below:

Attachment B Eligibility Specialist Role
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Today's Progress Last Updated: 10/20/2020 12:08 PM

My Completed Cases

Applications	0
Recertifications	1
Case Changes	1
Document Reviews	0

HRA Goal

Cases Due Today

Backlog

2 Extra Cases per person to backlog. It's a part!

Need Support?

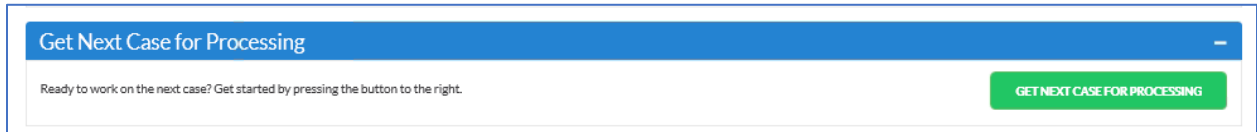
HRA Goal shows the total number of cases due today and the overall backlog for your program.

Backlog includes the cases that have passed their due date. If there is an arrow next to the Backlog number, it shows a change in the backlog compared to the last workday. The number after the arrow shows the change in backlog cases. If it's yellow, HRA has more cases in the backlog than the last workday. If it's green, HRA has fewer cases in the backlog than the last workday.

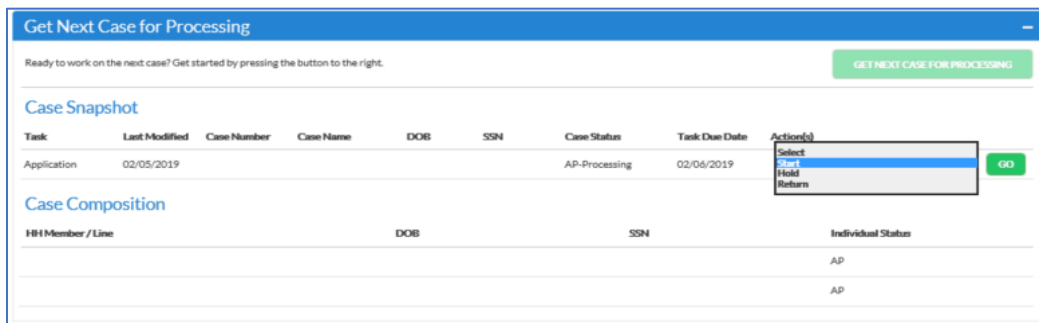
- Clicking on **Talk to your TEAM** opens **Microsoft Teams**. Clicking on **Start a Help Desk Ticket** opens the **Self-Service Incident Form** and allows the Eligibility Specialist to report any technical issues encountered in ANGIE.

4. Get Next Case for Processing: Next Priority Task for the Eligibility Specialist

The Eligibility Specialist will get the next task to work on by selecting the **Get Next Case for Processing** button located within the dashboard. The tasks that are distributed to the Eligibility Specialist will be based on the priority logic.



- Once the button is selected, the Eligibility Specialist will be shown a case profile consisting of **Case Snapshot** and **Case Composition**. The columns for Case Snapshot section consist of **Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status, Task Due Date, and Action(s)**. The columns for the Case Composition section consist of **HH Member/Line, DOB, SSN, and Individual Status**.
- The Eligibility Specialist will be able to start the task by selecting the **Start** option within actions dropdown, and then selecting the **GO** button. The ANGIE system will then launch the Streamlined POS application for the Eligibility Specialist to work on the respective task.

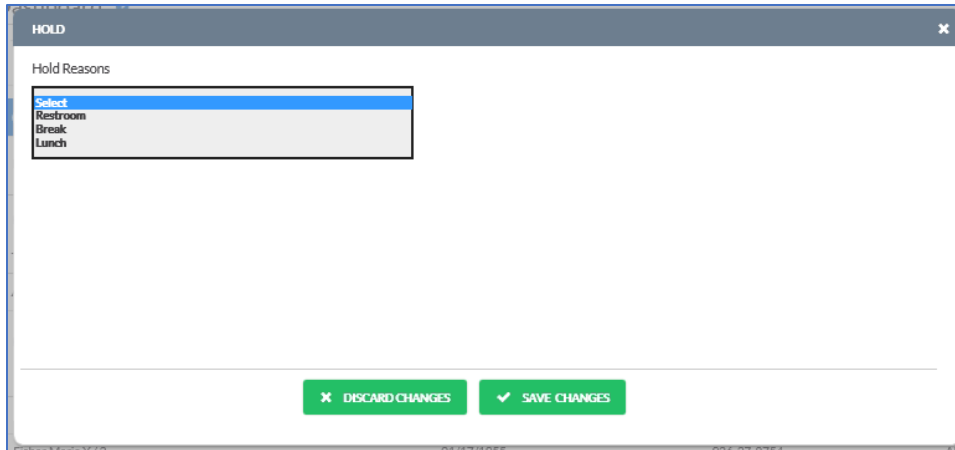


5. Hold or Return Task

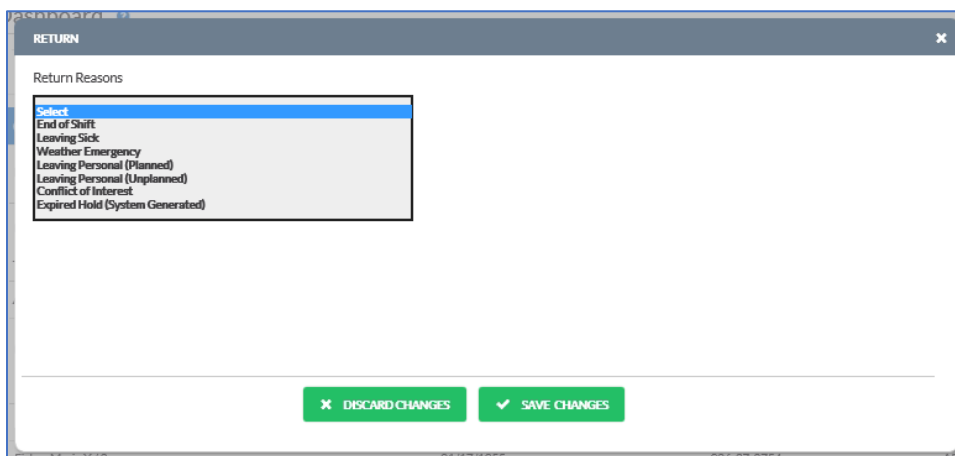
- The Eligibility Specialist can hold a task by selecting the **Hold** option from the **Action(s)** dropdown and clicking on the **Go** button. A modal window opens to select from the available Hold Reasons (Restroom, Break, Lunch).
- Once the Eligibility Specialist selects the applicable Hold Reason and then selects **Save Changes**, the hold will be applied on the respective task for a set time (2 hours), for that Eligibility Specialist.

Note that the Eligibility Specialist cannot work on another “prioritized task” until the hold task is worked. If the Eligibility Specialist returns within the set time, the Eligibility Specialist will be provided with the same task upon selecting the **Get Next Case for Processing** button. If the hold time lapses, then the task will be placed back in the general pool and another Eligibility Specialist may have access to that task.

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- The Eligibility Specialist can return a task by selecting the **Return** option from the Action(s) dropdown and clicking the **Go** button. A window opens to select from the available Return Reasons (End of Shift, Leaving Sick, Weather Emergency, Leaving Personal (Planned), Leaving Personal (Unplanned), Conflict of Interest, Expired Hold (System Generated)).
- After selecting the applicable return reason and clicking the **Save Changes** button, the task will be returned to the general pool and another Eligibility Specialist can get the task.

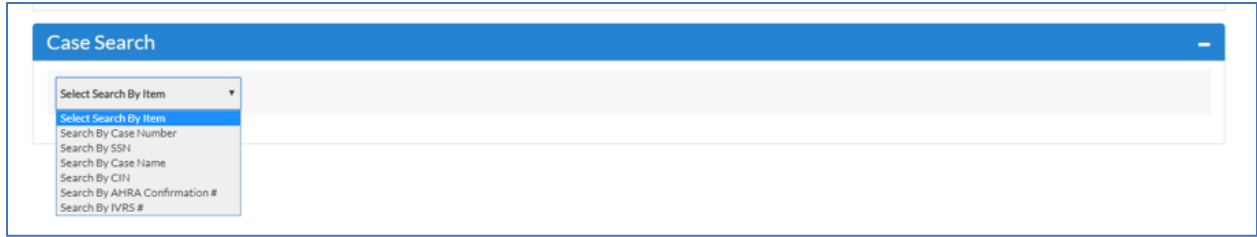


6. Case Search: Finding Other Cases and Actions

The Eligibility Specialist can search for a case based on the following criteria:

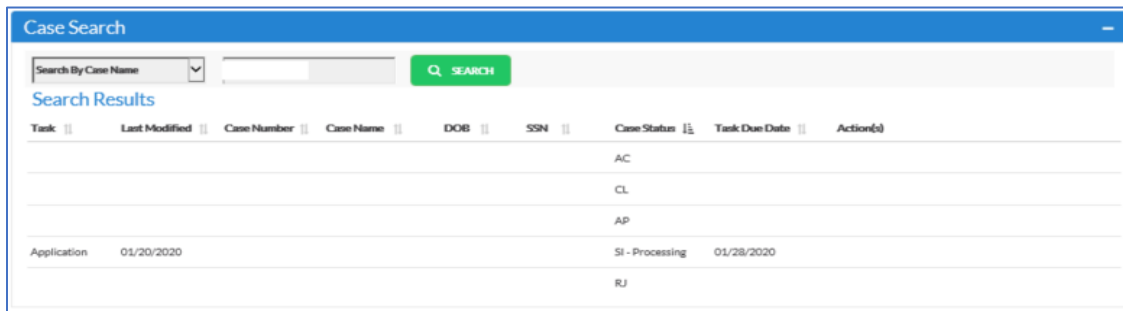
- Case Number
- SSN
- Case Name
- CIN
- AHRA Confirmation #
- IVRS # (Interactive Voice Response System)

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Based on the criteria selected from the dropdown, the Eligibility Specialist will be required to enter the corresponding information.

- Upon selecting the **Search** button, the system will display the search results consisting of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, **Task Due Date**, and **Action(s)**.



- Selecting the desired row will highlight that row as seen below. Once the desired row is selected, the Eligibility Specialist can select from available options from the Action(s) dropdown and select **Go** to execute. The options available within the Action(s) dropdown are dependent on the **Case Status** of the Search result. The search process can result in the following three outcomes:

(1) **Open Task**

- Cases with **open tasks** will have information in the **Task** and **Last Modified** columns of the **Search Results** section
- If system finds a case with **open task**, it will display this case first in the **Search Results** section
- If the system finds multiple cases with **open tasks**, it will display these cases first, sorted by earliest date in the **Task Due Date** column

(2) **Latest Task**

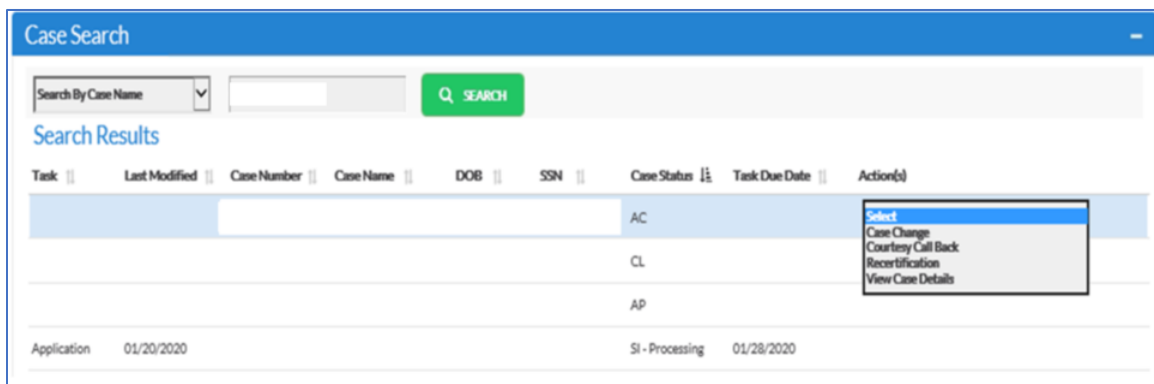
- If the system does not return any cases with **open tasks** in the **Search Results** section, the system will initially sort the found cases by **Case Number** column in **Ascending** order.
- Cases without **open tasks** are those where there is no information in the **Task** and **Last Modified** columns of the **Search Results** section

(3) **No Task**

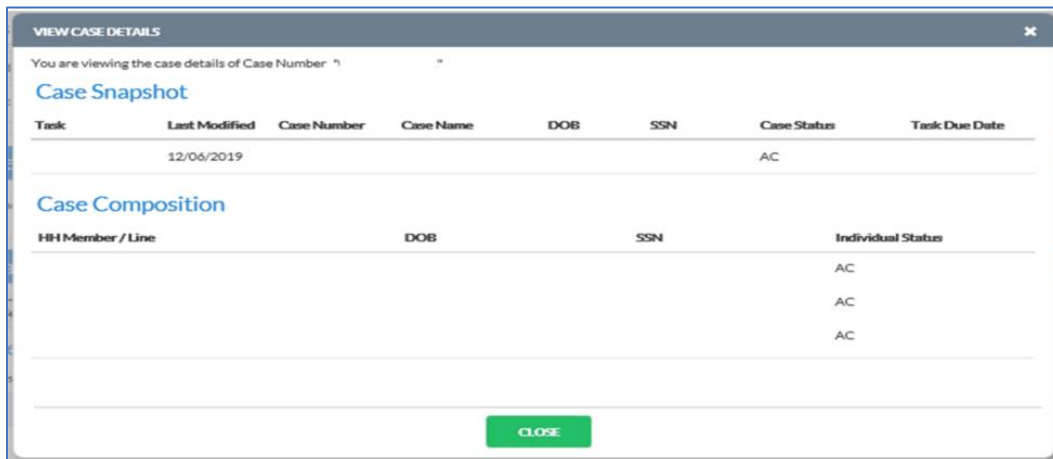
- The System displays the message "No Case found, please refine your search criteria."

Search Results Actions(s) Combo Box will contain a list of available actions for the Eligibility Specialist. These actions will be table-driven. These tables allow control at the following levels:

- Role of Eligibility Specialist (there are many titles within 1 role) - SPOS roles will be leveraged to maintain compatibility with POS queues.
- Center designation of the Eligibility Specialist.
- Current Welfare Management System (WMS) case status of the selected case in search results.
- List of activities available for the case, based on the case status and open task.



- Selecting the **View Case Details** option from Action(s) and **Go** will result in a modal window with the case profile, consisting of the **Case Snapshot** and **Case Composition**. The columns for the Case Snapshot section consist of **Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status,** and **Task Due Date**. The columns for the Case Composition section consist of **HH Member/Line, DOB, SSN,** and **Individual Status**.



7. Daily Activity Sheet for Eligibility Specialist

The **Daily Activity Sheet** widget keeps track of and displays a summary of the Eligibility Specialist's daily activity as a snapshot of the work completed for the current day. This allows the Eligibility Specialist to keep track of their work and in addition allows management to review the respective Eligibility Specialist's daily progress.

The Daily Activity Sheet provides information on the **Status, Start Time, Case Number, Case Name, Start Event, WMS Status, End Event, Decision, HH Size,** and **Duration (Mins)**. All columns are sortable.

- **Status:** The icons within this column will provide context at a glance for tasks that are **Completed** (green check), **Suspended** (yellow exclamation point) and **In-Progress** (blue hourglass).
 - For an Interview, the Status is Incomplete if the end event is **Suspend Interview**. Otherwise, the interview is complete.
 - For **processing actions**, the status is incomplete if the end event is **Suspend Processing** and the task status is not **Pending**. Otherwise, it is complete.
 - When an event is currently in progress:
 - Duration column for that row will display a dash (minus sign).
 - End Event column for that row will display "**N/A**".
- **Start Time:**
 - Displays the time that the event was started in the format: **hh:mm AM/PM**
 - The default view will be based on the ascending order of Start Time.
- **Case Number:** This is the Case Number associated with the case.
- **Case Name:** This is the WMS Case Name.
- **Start Event:** This is a combination of Task Type & the following elements:
 - For **Application** and **Recertification** Task:
 - Interview Started - If an Interview was either distributed from Get Next or started from Case Search, the element must display "Interview Started".
 - Ready to Assign Event - For any case that was distributed and started from the Get Next button, the Ready to Assign Event will be displayed. For example, "Mandated Verification Received – Full" event.
 - SPOS Activity - For any Events that were started from Case Search, the SPOS Activity must be used. For example, "Application Modification", "Make Case Comment", etc.
 - For **Change Case:** The start event is typically: "Change Case Ready" (if started from Get Next) or "Start Processing" (if started from Case search).
 - For **Document Review**, the start event is "Start Document Review".
- **WMS Status:** The existing WMS case status (starting state) - AP, RJ, SI, AC, CL.
- **End Event:** The final event that is triggered by the Eligibility Specialist's action. This data comes from the **Event Log**.

- For any start events in the status of **Interview** in the **Event Log**, the End Event is always either: Suspend Interview or Complete Interview.
- For **Change Case** events, the system will check whether a Deferral was made in the **Pending** status events; if yes, then the end event is “Deferred/Pending Change Verification”. Otherwise, the last event with a status of **Processing** is used.
- For other **Processing-related** start events other than **Change Case**, the End Event is recorded when the Processors finish their action in SPOS (last event with a status of **Processing** for the Eligibility Specialist).
- The End Event can be Complete interview, Suspend processing or Complete processing. The End events will be further distinguished to have the exact outcome, with the possible values displayed below. The event log will also get updated accordingly.
 1. Complete Interview - No deferral
Complete Interview - Deferred for verification
Complete Interview - Deferred for IVS/RFI/SDX
Complete Interview - Deferred for verification and IVS/RFI/SDX
NOTE: For the Interview, the End Event should be the latest event with the status of Interview
 2. Suspend Processing - Deferred for change verification
NOTE: For processing actions, the end event will be the latest event with the status of Processing
- For cases that are “In Progress”, the End Event column will reflect N/A for the respective row.
- **Decision:** This is the Status and Reason Code selected in SPOS (End State), as it represents the action that the Eligibility Specialist took on the case to end their processing and reach a case outcome.
 - The decoded value is needed. For example: **AC-A30** (Same Approval each month), **RJ-V21** (Failure to Provide Verification), **SI-Q22** (Expedited Pending Verification).
 - The description of the code will not be included.
 - If there is no SPOS decision code, then the reason code will be blank. For example, “Applying (AP)- “, “Active (AC)-“
- **HH Size:** Number of people in AP, Single Issue (SI) or AC status in associated with the WMS case.
- **Duration (Min):** This value will be the time, in minutes, it takes an Eligibility Specialist to process the task/activity on the case.
 - For cases that are “In Progress”, the duration field will be a dash (minus sign) for the respective row.

At the header level of widget shows the time the Eligibility Specialist has spent in the ANGIE system in the format: **Hours in System: X hrs YY min**

- Selection of the Refresh button at the header of this widget will refresh the data for the Daily Activity widget. Consequently, the last updated timestamp will also update.

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Daily Activity Sheet				Hours in System: 3 hrs 18 min		Last Updated: 10/20/2020 12:08 PM		
Status	Start Time	Case Number	Case Name	WMS Status	End Event	Decision	HH Size	Duration (Mins)
✓	09:06 AM			AP	Complete Interview - Deferred for Verification	AC-A30	6	40
!	09:48 AM			AP	Suspend Processing	AC-A30	6	22
✓	10:18 AM			AC	Deferred/Pending Change Verification	AC-832	4	21
!	10:42 AM			AP	Suspend Interview	AP-	3	15
✓	11:04 AM			AC	Recertification - Mandated Verification Received - Full	AC-A30	8	30
🕒	11:55 AM			AC	Document Review - Start Document Review	AC-A30	5	-

Help Text displayed when Selecting Help Icon for the daily activity sheet:

Daily Activity Sheet				Hours in System: 3 hrs 18 min		Last Updated: 10/20/2020 12:08 PM		
Status	Start Time	Case Number	Case Name	WMS Status	End Event	Decision	HH Size	Duration (Mins)
✓	09:06 AM			AP	Complete Interview - Deferred for Verification	AC-A30	6	40
!	09:48 AM			AP	Suspend Processing	AC-A30	6	22
✓	10:18 AM			AC	Deferred/Pending Change Verification	AC-832	4	21
!	10:42 AM			AP	Suspend Interview	AP-	3	15
✓	11:04 AM			AC	Recertification - Mandated Verification Received - Full	AC-A30	8	30
🕒	11:55 AM			AC	Document Review - Start Document Review	AC-A30	5	-

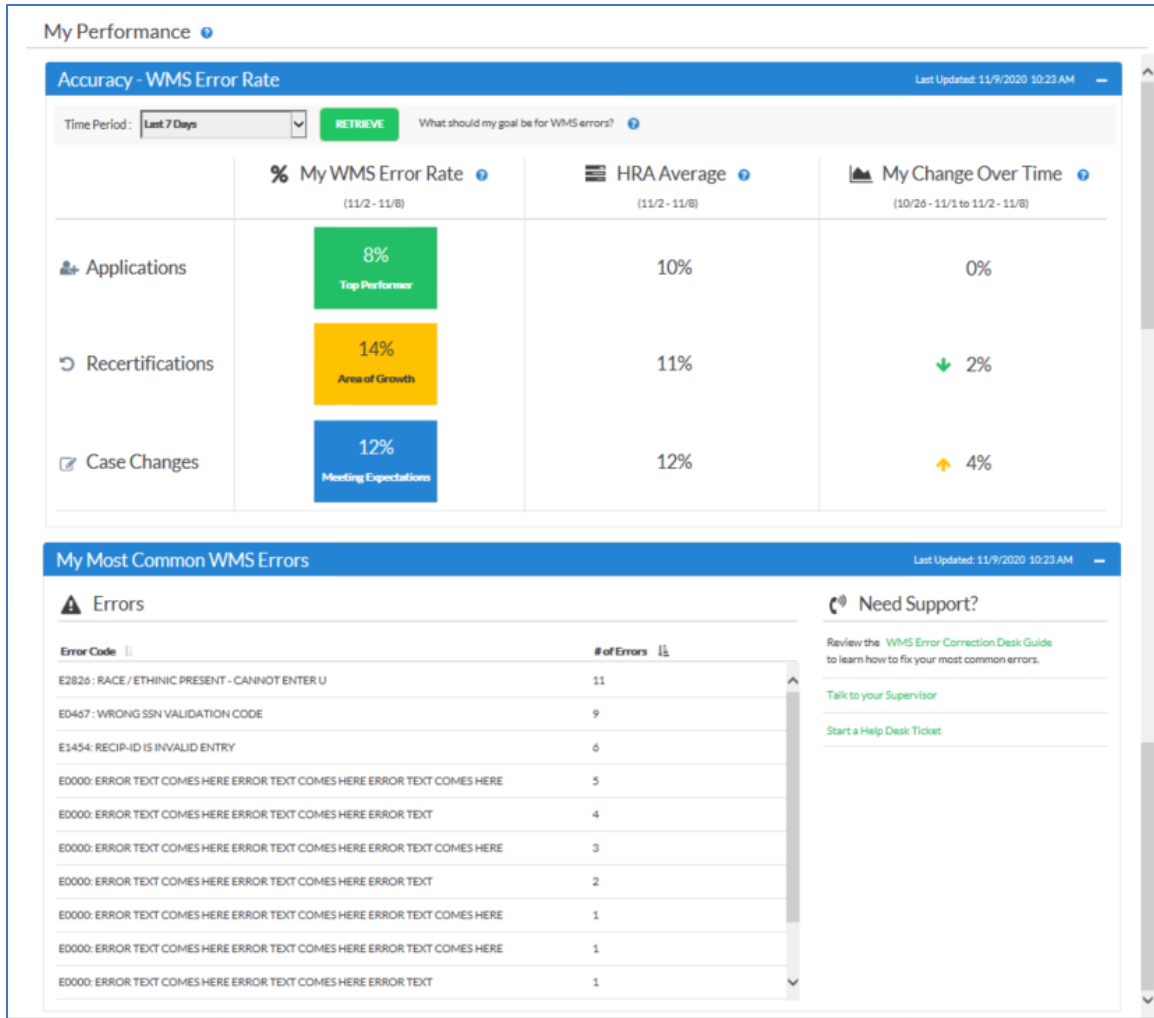
Daily Activity Sheet is a dashboard that tracks and shows a summary of your work in progress and cases you have completed for the current workday.

Each row shows the status of your activities as Complete (with a green check), Incomplete (with a yellow exclamation mark), or In Progress (with a blue hourglass). Each row also shows the Task Type, the event that started and ended the activity, as well as other case information.

8. My Performance Page for Eligibility Specialist

The Eligibility Specialist has access to the **My Performance** page and can be accessed from the left navigation pane. The My Performance page of the Eligibility Specialist consists of **Accuracy – WMS Error Rate** and **My Most Common WMS Errors** widgets as seen below.

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The **Accuracy - WMS Error Rate** widget provides **Error Rates** on the **Applications, Recertifications, and Case Changes** worked on by the Eligibility Specialist for the set timeframe. Within this widget, the Eligibility Specialist is required to select the timeframe for the report to generate and can choose from **Last 7 Days, Last 30 Days, or Last 90 Days**.

- Once the desired timeframe is selected, selecting the **Retrieve** button will display the corresponding results.

The table provides **Error Rates** on the **Applications, Recertifications, and Case Changes** worked on by the Eligibility Specialist for the set timeframe. It provides the Eligibility Specialist with information on their performance in terms of their own Error Rate (displayed within **My WMS Error Rate**), **HRA Average Error Rate** (displayed within **HRA Average**), and keeps track of the Eligibility Specialist's current Error Rate over the previous period (displayed within **My Change Over Time**).

My WMS Error Rate column:

- At the header level, the actual dates for the timeframe selected is displayed below the **My WMS Error Rate** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- WMS Error Rate **Calculation**: Numerator = number of errors made on that type of task. Denominator = total number of that type of task submitted to WMS.
 - Both the numerator and the denominator must occur within the timeframe in order to be part of the WMS Error Rate Calculation.
 - The WMS Error Rate is displayed as a percentage.
 - If the Eligibility Specialist did not perform any tasks (0 tasks) for the selected time period (e.g. The Eligibility Specialist did not do any Case Changes in the Last 7 Days [selected period], and only worked on Applications and Recertifications), **N/A** will be displayed across Case Changes row. In this example, Applications and Recertifications will have Error Rates across the rows.
- Depending on the WMS Error rate comparison to the HRA Average, the following depictions are used:
 - If the Eligibility Specialist's Error Rate for the selected period is less than the HRA Average, the header will read **Top Performer** colored in a green color block.
 - If the Eligibility Specialist's Error Rate for the selected period is the same as the HRA Average the header will read **Meeting Expectations** colored in a blue color block.
 - If the Eligibility Specialist's Error Rate for the selected period is greater than the HRA Average, the header will read **Area for Growth** colored in a yellow color block.

HRA Average column:

- At the header level, the actual dates for the selected time period is displayed below the **HRA Average** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- Shows the average **WMS Error Rate** for all other Eligibility Specialists for the selected time across each **Task Type** (Applications, Recertifications, and Case Changes)

My Change over Time column:

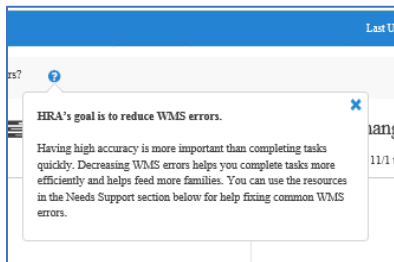
- At the header level, the actual dates for the previous time period are displayed below the **My Change Over Time** column in the following format: [previous timeframe to current timeframe in the following date format: mm/dd – mm/dd to mm/dd - mm/dd]
- If this period's **Error Rate** is below that of the last period, there will be a green arrow pointing downwards, followed by the change in percent.
- If this week's **Error Rate** is the same from the last week, it will only display "0%".

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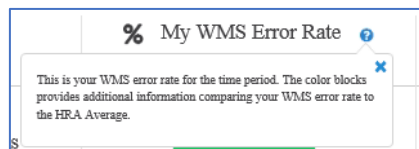
- If this week's **Error Rate** is above that from the last week, there will be a yellow arrow pointing upwards, followed by the change in percent.

Accuracy - WMS Error Rate Last Updated: 11/9/2020 10:23 AM			
Time Period: Last 7 Days RETRIEVE What should my goal be for WMS errors?			
	% My WMS Error Rate (11/2 - 11/8)	HRA Average (11/2 - 11/8)	My Change Over Time (10/26 - 11/1 to 11/2 - 11/8)
Applications	8% Top Performer	10%	0%
Recertifications	14% Area of Growth	11%	↓ 2%
Case Changes	12% Meeting Expectations	12%	↑ 4%

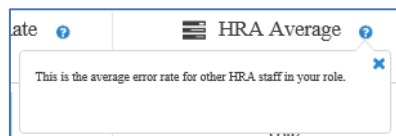
Help text for “What should my goal be for WMS errors?” when selecting the help icon:



Help Text displayed when selecting the help icon for My WMS Error Rate column as shown below:

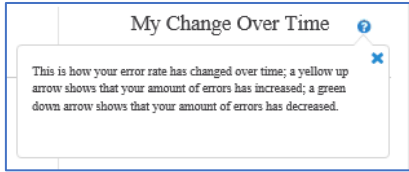


Help Text displayed when selecting the help icon for this column as shown below:

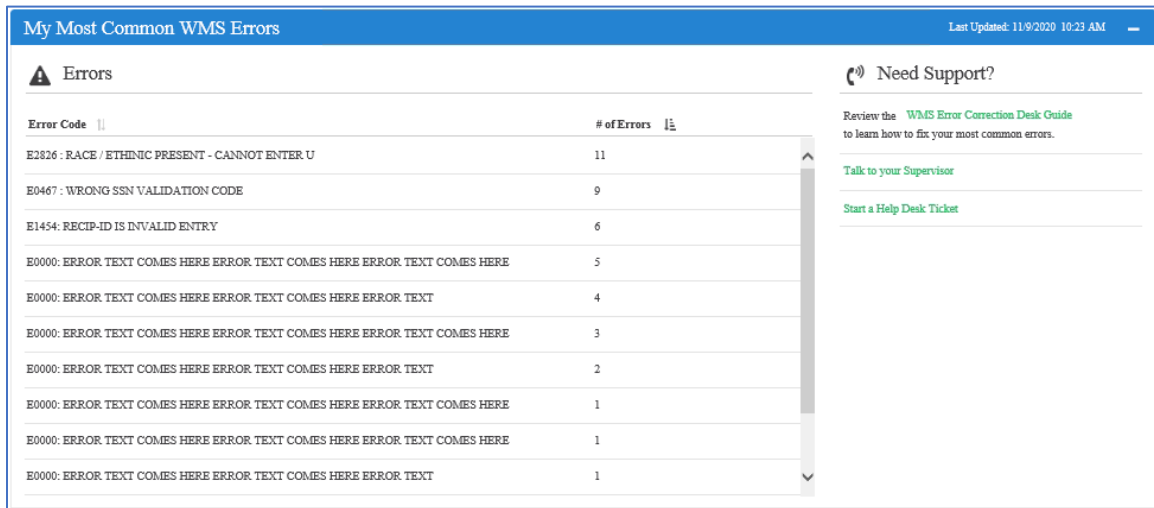


Help Text displayed when selecting the help icon for this column as shown below:

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The **My Most Common WMS Errors** widget has a summary table of the Eligibility Specialist's most common Errors for the selected time period. The table consists of two columns. The **Error Code** column shows the name of the WMS Error(s). The **# of Errors** column shows the count of the number of corresponding WMS Errors. Both columns are sortable.



The screenshot shows the "My Most Common WMS Errors" widget. It features a table with two columns: "Error Code" and "# of Errors". The table is sorted by the number of errors in descending order. To the right of the table, there is a "Need Support?" section with three links: "Review the WMS Error Correction Desk Guide", "Talk to your Supervisor", and "Start a Help Desk Ticket".

Error Code	# of Errors
E2826 : RACE / ETHNIC PRESENT - CANNOT ENTER U	11
E0467 : WRONG SSN VALIDATION CODE	9
E1454: RECIP-ID IS INVALID ENTRY	6
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT COMES HERE	5
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT	4
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT COMES HERE	3
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT	2
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT COMES HERE	1
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT COMES HERE	1
E0000: ERROR TEXT COMES HERE ERROR TEXT COMES HERE ERROR TEXT	1

The last section of this widget includes the **Need Support?** and includes the following links:

- **WMS Error Correction Desk Guide**: Clicking on this link will launch the abridged version of the WMS Error Correction Desk Guide in PDF.
- **Talk to your supervisor**: Clicking on this hyperlink launches Microsoft TEAMS.
- **Start a Help Desk Ticket**: Clicking on this hyperlink launches a help desk ticket.

9. Event Log

A newly added **Event Log** section is displayed on the **Overview** screen of the Streamlined POS application. The event log section of the **Overview** screen only shows the events for the current task. This read-only grid will provide information on the Status, Event, Date, Staff Name, and Unit.

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The screenshot shows the NYC SNAP APPLICATION INTERVIEW Overview screen. The left sidebar contains navigation options: OVERVIEW (selected), INTERVIEW, BUDGET, TAD, GRANTS, FORMS, and PROCESSOR SUMMARY. The main content area is titled 'Overview' and shows 'No Reasonable Accommodations Reported'. Below this is the 'Event Log' section, which includes a table with columns for Status, Event, Date, Staff Name, and Unit. A 'Full Event Log' link is present. To the right is a 'VERIFICATION' panel with tabs for 'For Review', 'Missing', 'Other Docs', and 'Reviewed'. It lists various documents like 'Landlord letter Statement from Non-Relative Landlord', 'M- Home Address', 'O- Housing Expenses - Rent', 'Retirement or Pension Benefit Letter', 'M- Pensions', 'Pay Stubs', 'M- Income from Employment', and 'Statement from Medical Professional'. There are 'DISCARD CHANGES' and 'SAVE CHANGES' buttons at the bottom of the verification panel.

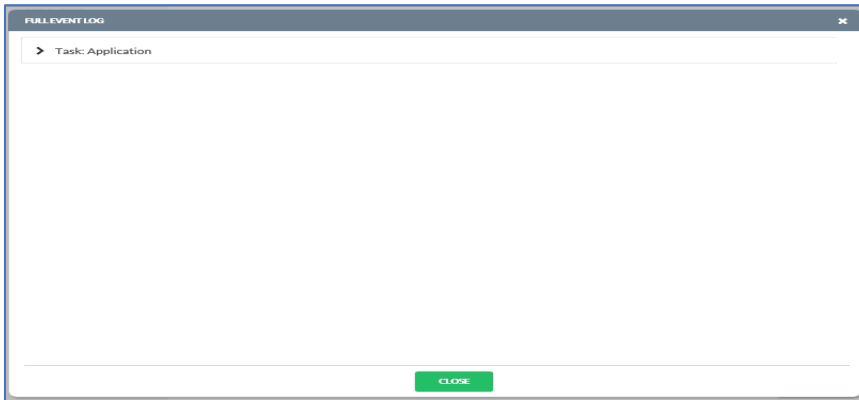
The Eligibility Specialist can see the complete events for all tasks upon selecting the **Full Event Log** link within the Event log section of the Overview screen.

- Upon selection of the link, the Eligibility Specialist will be displayed with the modal window showing all the events for all the tasks on the respective case. Below shows the **Full Event Log** for the **Application Interview Activity**.

The screenshot shows the FULL EVENT LOG modal window. It features a table with the following columns: Status, Event, Date, Staff Name, and Unit. The table lists various events such as 'Started from Get Next', 'Mandated Verification Received - Full', 'Document Indexed', 'Document Submitted', 'ESNAP: sent to WMS', 'Complete ESNAP Supervisor Review', 'Start ESNAP Supervisor Review', 'Started from Get Next', 'Supervisor Review Required', 'Processing Complete', 'ESNAP Processing', 'ESNAP Ready', 'Deferred for Verification', 'Complete Interview', 'Start Interview', and 'Started from Get Next'. A 'CLOSE' button is located at the bottom center of the modal.

Status	Event	Date	Staff Name	Unit
Processing	Started from Get Next	02/05/2019 10:05AM		AA10
Ready to Assign	Mandated Verification Received - Full	02/02/2019 3:39PM		
Pending	Document Indexed	02/02/2019 3:39PM		AA10
Pending	Document Submitted	02/02/2019 3:39PM		
Supervisory	ESNAP: sent to WMS	01/27/2019 12:29 PM		AA10
Supervisory	Complete ESNAP Supervisor Review	01/27/2019 12:28 PM		AA10
Supervisory	Start ESNAP Supervisor Review	01/27/2019 12:21 PM		AA10
Supervisory	Started from Get Next	01/27/2019 12:20 PM		AA10
Ready to Assign	Supervisor Review Required	01/27/2019 12:12 PM		
Processing	Processing Complete	01/27/2019 12:11 PM		AA10
Processing	ESNAP Processing	01/27/2019 12:11 PM		AA10
Ready to Assign	ESNAP Ready	01/27/2019 11:51 AM		
Pending	Deferred for Verification	01/27/2019 11:51 AM		AA10
Interview	Complete Interview	01/27/2019 11:50 AM		AA10
Interview	Start Interview	01/27/2019 11:21 AM		AA10
Interview	Started from Get Next	01/27/2019 11:20 AM		AA10
New	App Reg - In Center	01/26/2019 9:35 AM		AA10

Within the **Modal** window, each task can be expanded or collapsed upon selection as seen below.

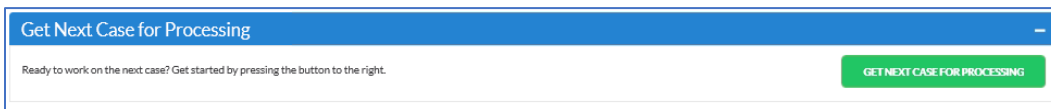


10. New SPOS Activity: Document Review

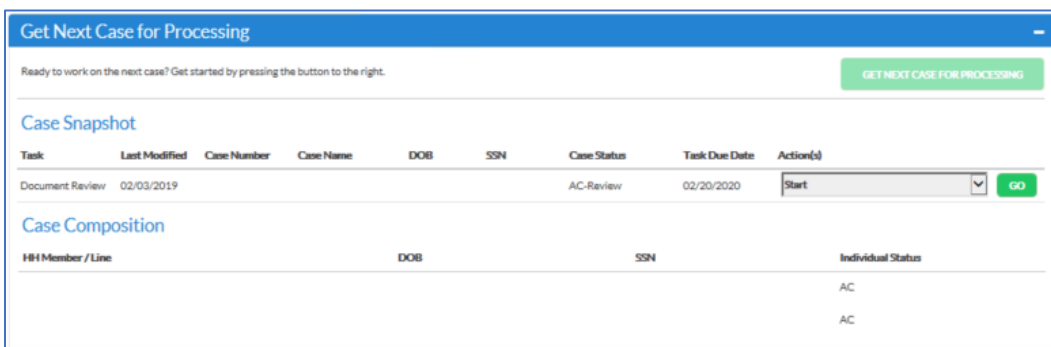
ANGIE will assign a new task known as **Document Review**. This task will be created when documents are received for an active case and there is no pending recertification or case change task for the case.

The SPOS **Document Review** activity will allow the Eligibility Specialist to review newly submitted client facing documents for active SNAP cases to determine whether changes are required based on the submitted information. The **Document Review** task will be distributed to the Eligibility Specialist based on the priority logic.

- The **Document Review Activity** will start when the Eligibility Specialist selects the “**Get Next Case for Processing**” button. The system assigns the next available Task with the highest priority that is ready to be worked.



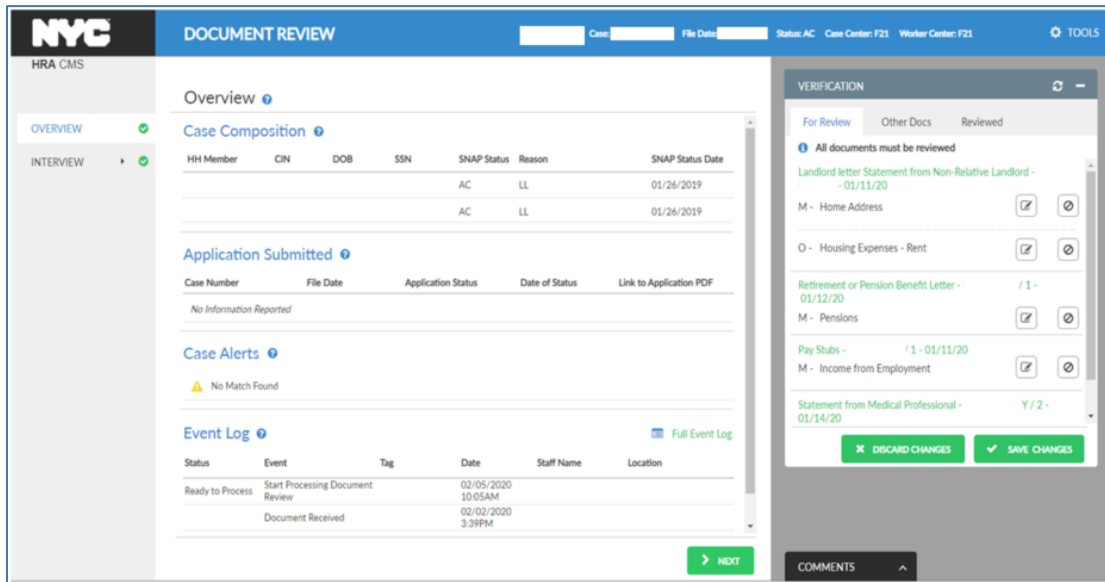
The Eligibility Specialist will see the case profile.



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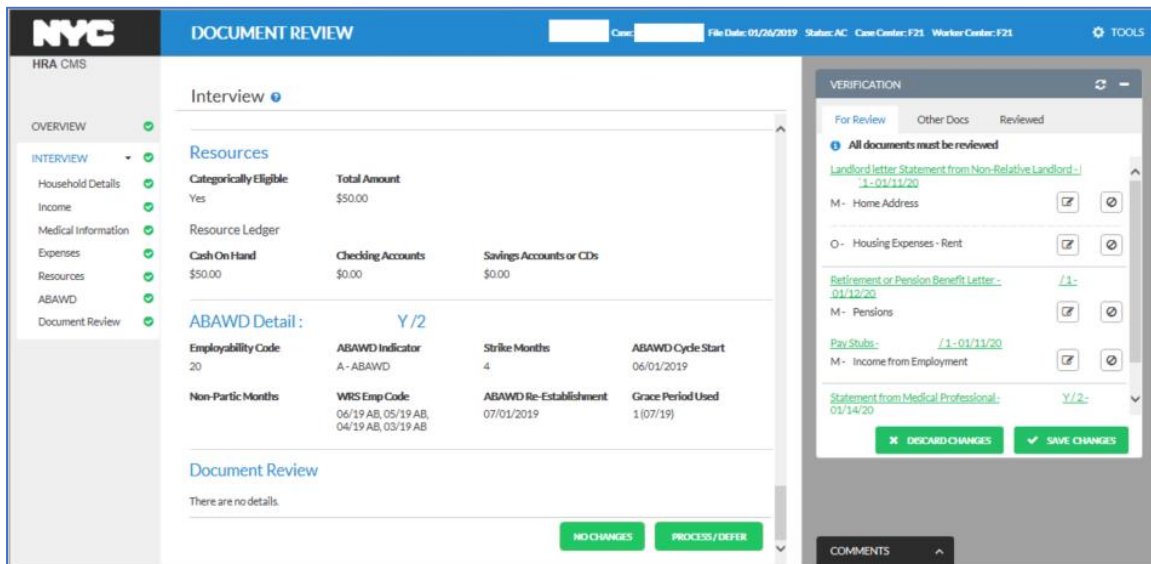
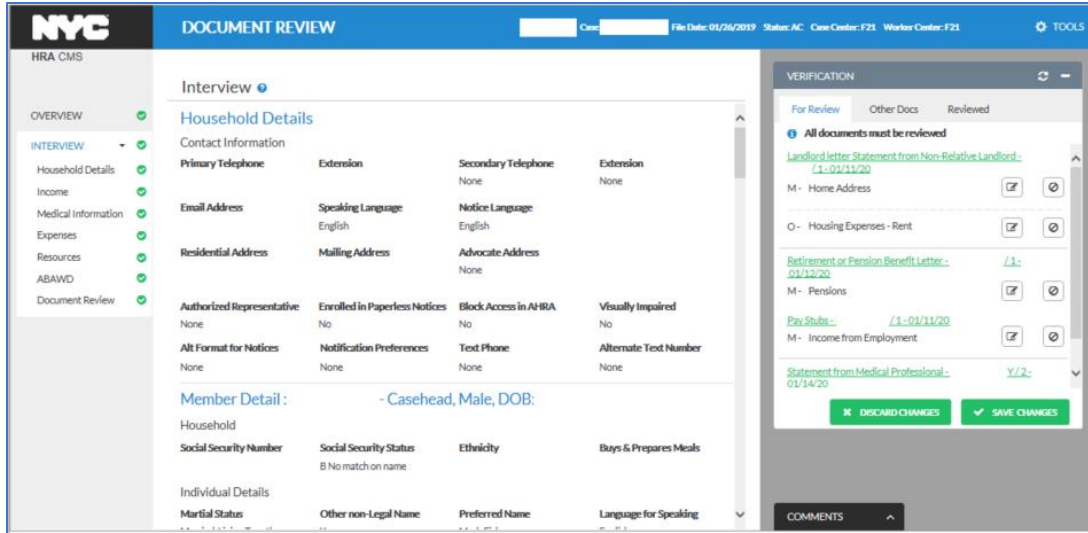
- Selecting the **Start** action and clicking on the **Go** button from ANGIE, will open the **Document Review Activity** in the Streamlined POS (SPOS) application. All work processed in SPOS during the Document Review Activity will be tracked within ANGIE.

The **Overview** screen is the landing page of the Document Review activity. The **Overview** screen and **Interview Review** screens will be accessible to the Eligibility Specialist in the Document Review activity.



- Selecting the **Next** button on the bottom of the **Overview** page will navigate the Eligibility Specialist to the **Interview Review** screen. Note that the Eligibility Specialist will not have access to the editable interview through the **Edit** (pencil) icons on the **Interview Review** screen. The Eligibility Specialist can also access the **Interview Review** screen by selecting the **Interview** link on the left navigation pane.

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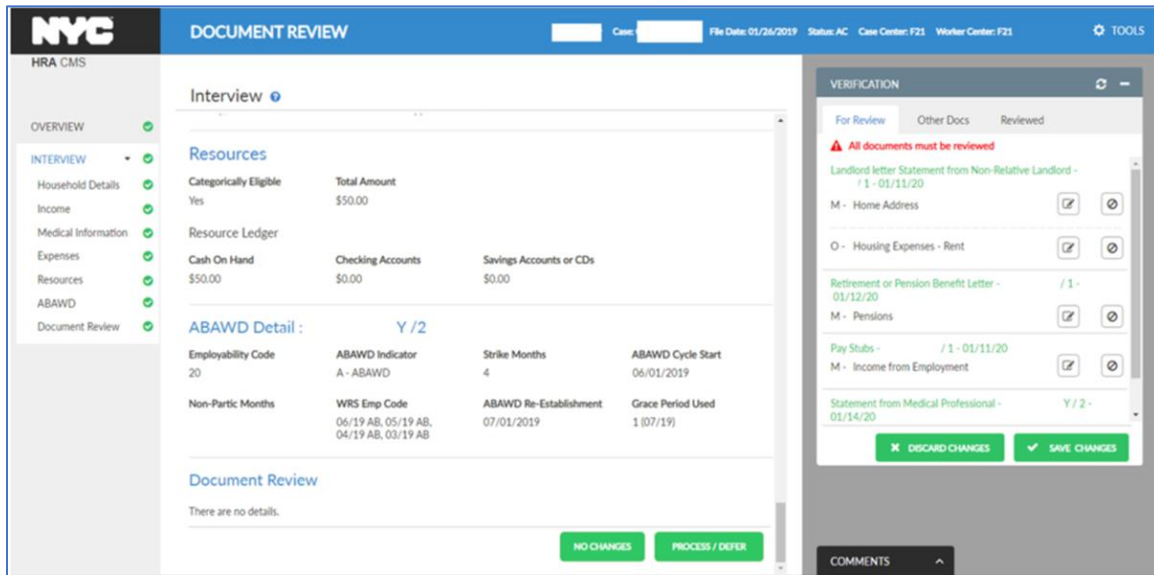
The Eligibility Specialist will **NOT** have access to the editable Interview through the **Edit** (pencil) icons on the **Interview Review** screen. The middle panel displays the complete read only summary details of the Interview. In addition to the standard Interview details, it also displays the new section of **Document Review** details. Initially before reviewing any documents, there is no information of document review and therefore the message “**There are no details**” will be displayed, as seen above.

The bottom of the **Interview Review** screen contains the action buttons consisting of **No Changes** and **Process Defer** buttons.

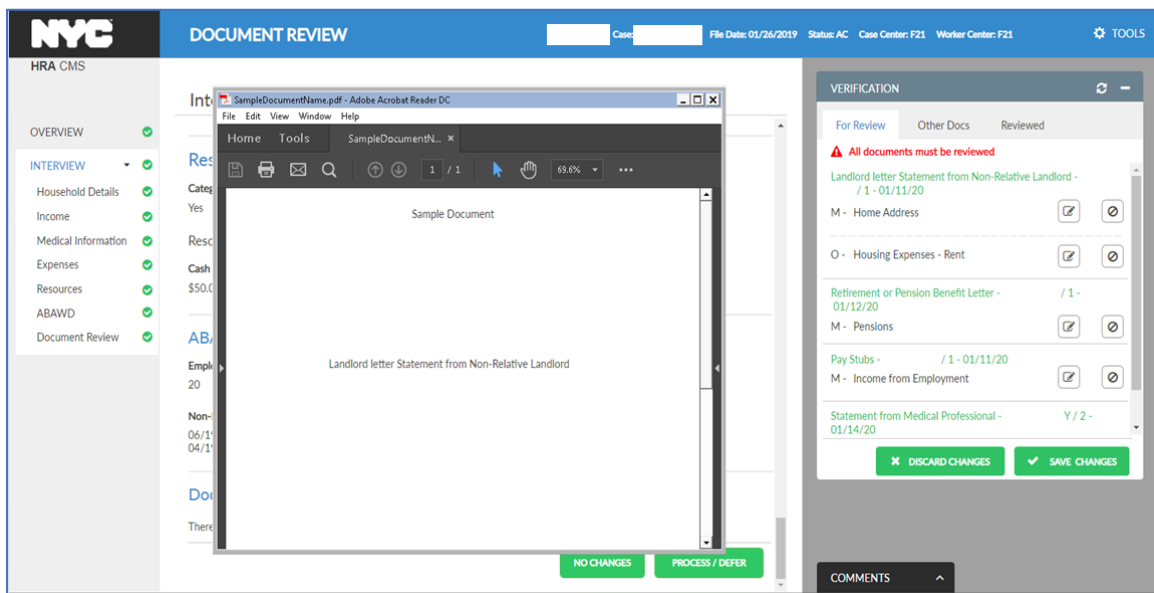
- All the documents in the verification widget under “**For Review**” tab **MUST** be reviewed before clicking on the “**No changes**” or “**Process/Defer**” buttons at bottom. If the Eligibility Specialist tries to skip the document review and click on the bottom “**No Changes**” or “**Process/Defer**” button then the system displays

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the error message “All documents must be reviewed” (red color) in verification widget as seen below.

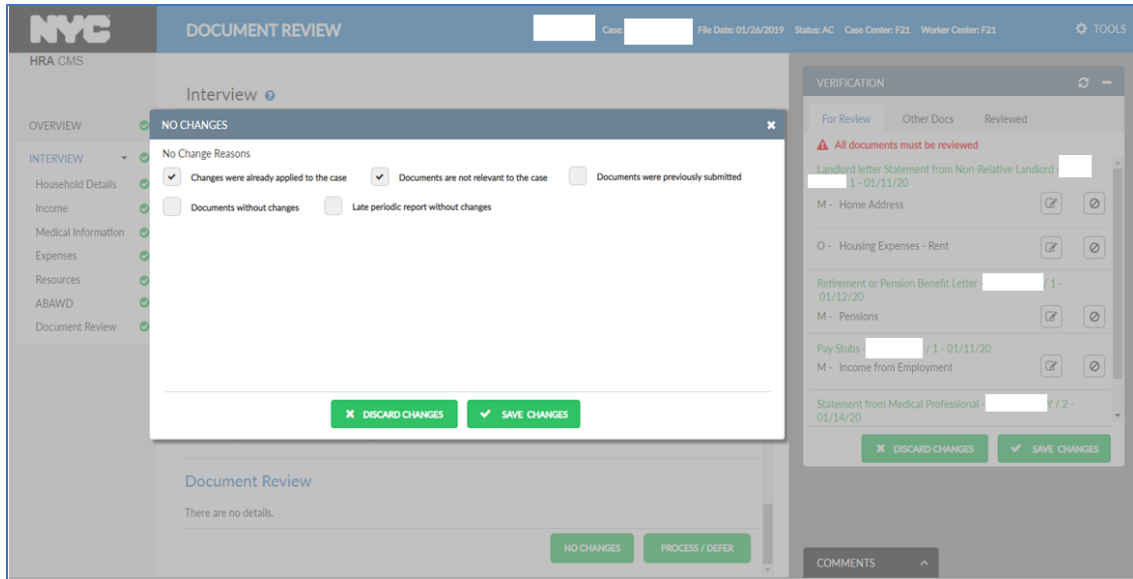


- Clicking on “Document link” (green color) in the verification widget will open a PDF of the document in a popup as seen below.



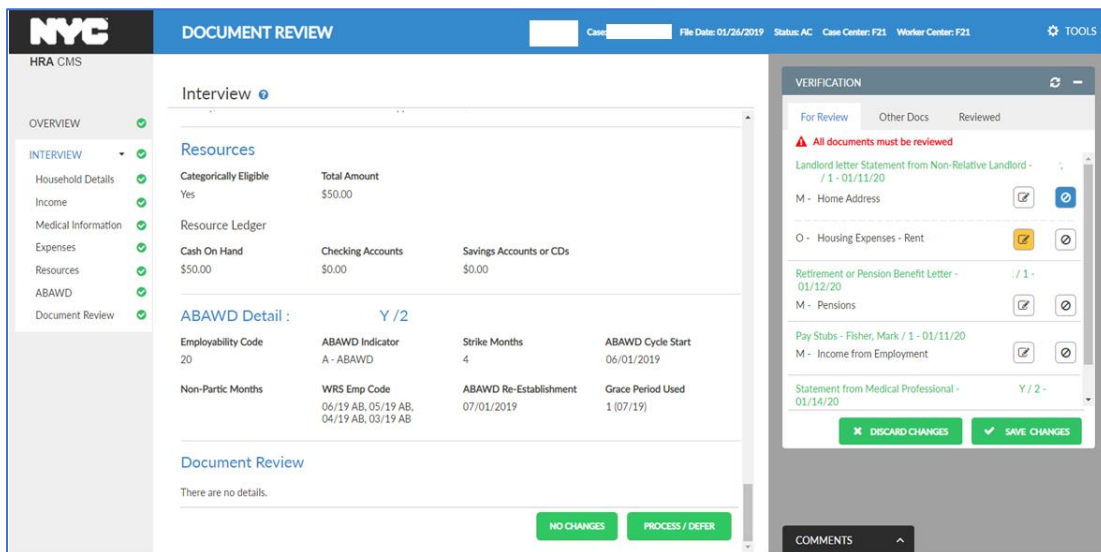
- Clicking the **No Changes Required** button next to the eligibility factor opens the **No changes** dialog window. The Eligibility Specialist must select the appropriate **No Change Reasons**. The system will allow the selection of multiple reasons within this modal window.

Attachment B Eligibility Specialist Role
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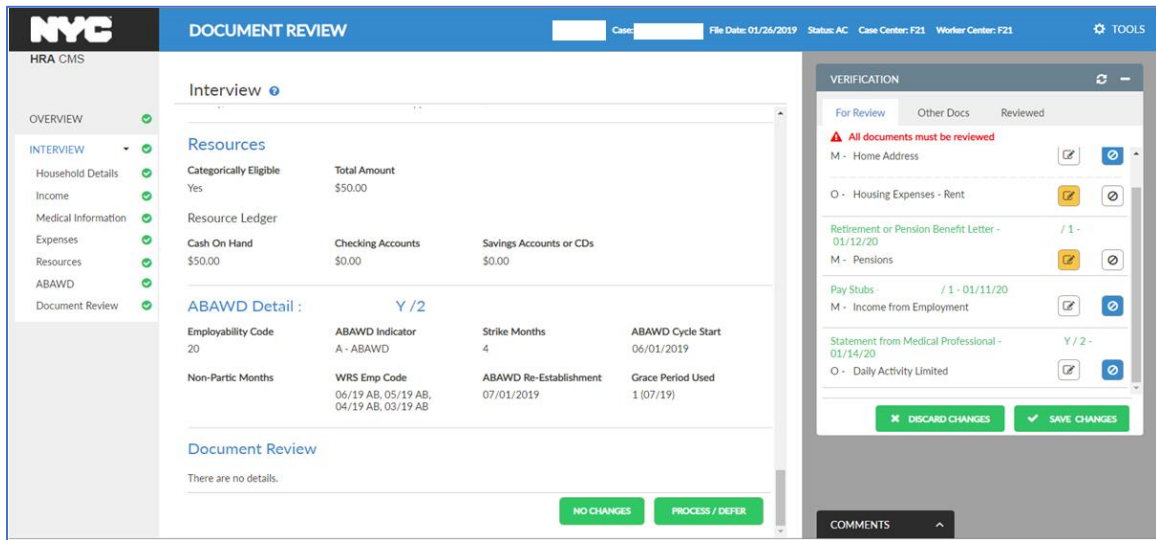
After saving the reasons in the **No Changes** dialog window, it changes the **No Changes Required** button's state from **White**, to **Blue**, as seen on below screen.

- When it is required to further edit, then selecting the **No Changes Required** button will display the last saved reasons in the **No Changes** dialog.
- Selecting the **Changes Required** button indicates that there is no further action required and therefore changes the color of icon from **White**, to **Yellow** as seen on the below screen.

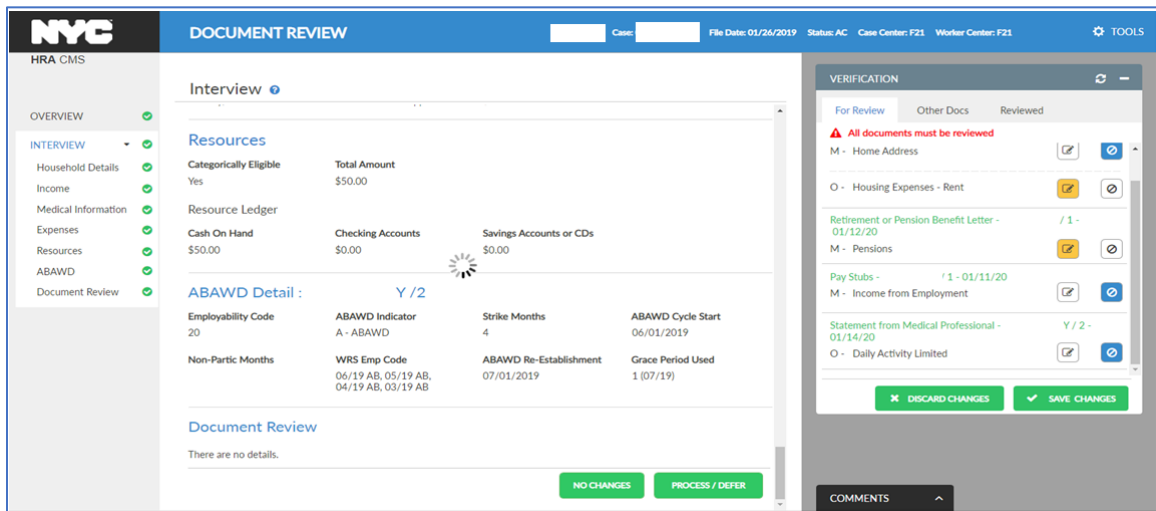


The Eligibility Specialist must review every document within the For Review tab. After taking the necessary action of **Changes Required** or **No Changes Required** in the verification widget under the “For Review” tab, the display changes from the default state of white to **Changes (Yellow)** or **No Changes (Blue)**.

Attachment B Eligibility Specialist Role
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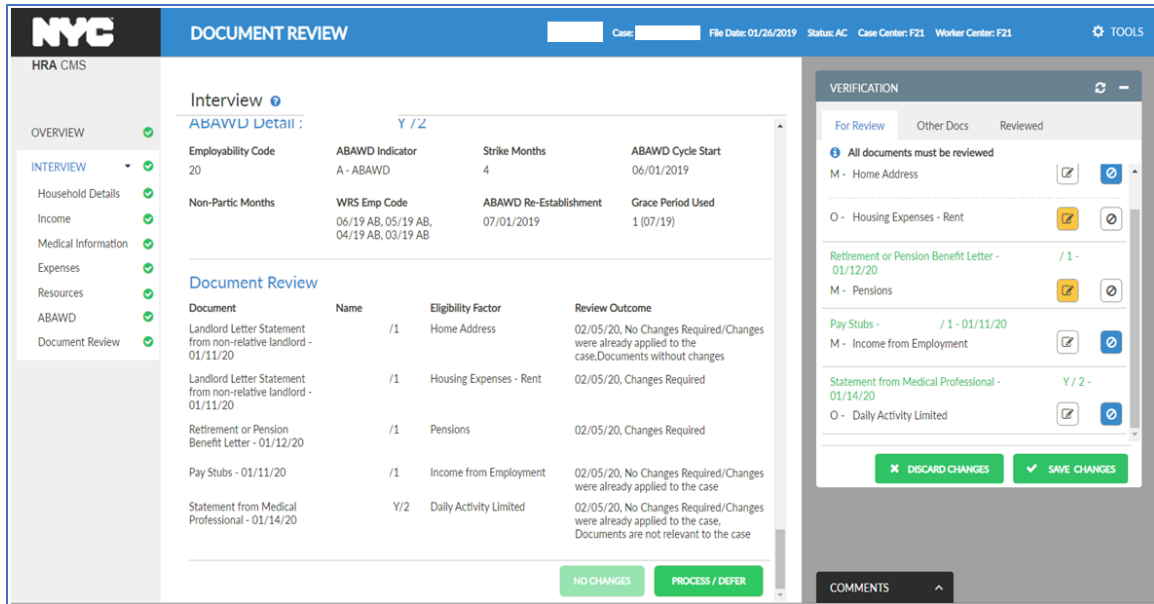


- The Eligibility Specialist must click on the **Save Changes** button in the verification widget to save the Document Review changes in the system.



Simultaneously, this will result in saving the changes in the **Document Review** section of the **Interview Review** screen as seen below.

Attachment B Eligibility Specialist Role
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The Document review section displays the details of **Document Review** such as **Document, Name, Eligibility Factor** and **Review Outcome** which includes Review Date, Changes Required or No Changes Required, and No Change Reason(s).

No Changes button:

- Disabled when one or more of the eligibility factors marked as **Changes Required**.
- Enabled if all eligibility factors are marked as **No Changes Required**.

Process/Defer button: Always enabled

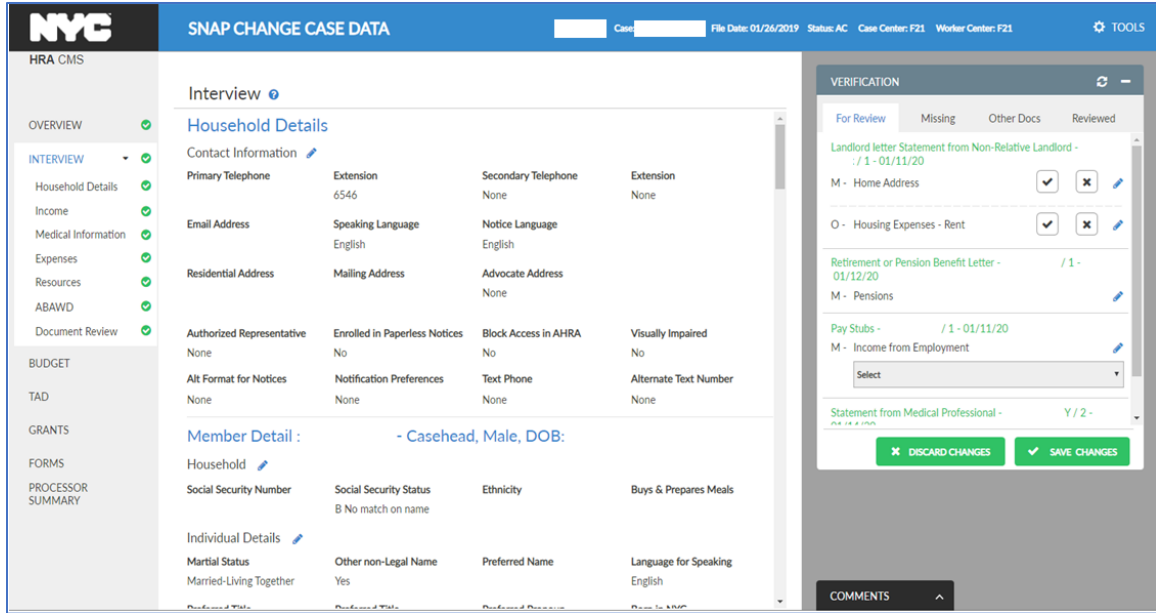
The following logic will drive the display of the **action buttons** at the bottom of the **Interview Review** screen in **SPOS Document Review** activity.

- The **No Changes** button is available at the bottom of the screen and ends the activity. Upon selection, the Eligibility Specialist will be returned to the ANGIE.
- A **Process / Defer** button is available at the bottom. This button takes the Eligibility Specialist to the **Interview Review** screen in the **SNAP Change Case Data** activity to allow the Eligibility Specialist to process any changes needed to the case data prior to calculating a budget.
- The Eligibility Specialist can suspend the activity at any time.

SNAP Change Case Data Activity – Interview Review Screen

- Selecting the **Process/Defer** button in **Document Review** Activity will result in the system opening up the **SNAP Change Case Data** Activity as seen below. The **Interview Review** screen will be the default landing screen of the **SNAP Change Case Data** Activity when it navigates from the **Document Review** Activity.

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SNAP Change Case Data Activity – SPOS Document Review Section of Interview Review Screen

The contents of the **Document Review** section of the Interview Review screen displays the same data/content that were filled out in **Document Review** Activity.

Document	Name	Eligibility Factor	Review Outcome
Landlord Letter Statement from non-relative landlord - 01/11/20		Home Address	02/05/20, No Changes Required/Changes were already applied to the case. Documents without changes
Landlord Letter Statement from non-relative landlord - 01/11/20		Housing Expenses - Rent	02/05/20, Changes Required
Retirement or Pension Benefit Letter - 01/12/20		Pensions	02/05/20, Changes Required
Pay Stubs - 01/11/20		Income from Employment	02/05/20, No Changes Required/Changes were already applied to the case
Statement from Medical Professional - 01/14/20		Daily Activity Limited	02/05/20, No Changes Required/Changes were already applied to the case, Documents are not relevant to the case

11. SPOS Activity Integration

The following SPOS activities are integrated with ANGIE for the **Application** tasks:

- **Application Interview**
- **Application Modification**
- **ESNAP Decision**
- **FTK Application Interview**
- **EC - Application Interview**
- **EC - ESNAP Decision**
- **EC - FTK Application Interview**
- **Settle in Conference**
- **Stop Adverse Action**

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- **Print a Form**
- **Make Case Comment**
- **Document Intake**

The following SPOS activities are integrated with ANGIE for the **Recertification** tasks:

- **Recertification Interview**
- **EC - Recertification Interview**
- **Settle in Conference**
- **Stop Adverse Action**
- **Print a Form**
- **Make Case Comment**
- **Document Intake**

The following SPOS activities are integrated with ANGIE for the **Case Change** tasks:

- **Change Case Data**
- **EC - Change Case Data**
- **Settle in Conference**
- **Stop Adverse Action**
- **Print a Form**
- **Make Case Comment**
- **Document Intake**
- **Case Transfer**

Supervisor Role

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1. Document Objective

The objective of this document is to provide context on screens for the Supervisor role within the Activity and General Information Exchange (ANGIE). The layout of the ANGIE dashboard for the Supervisor will allow the logical completion of the activities related to the role and consume the necessary information for the role.

2. Homepage: Dashboard for the Supervisor

Upon login, the landing screen in ANGIE will be the **Dashboard** page. This screen will allow the Supervisor to view their progress, keep track of their team's progress, access their next priority task and search for cases. It will replace the individual's POS queue.

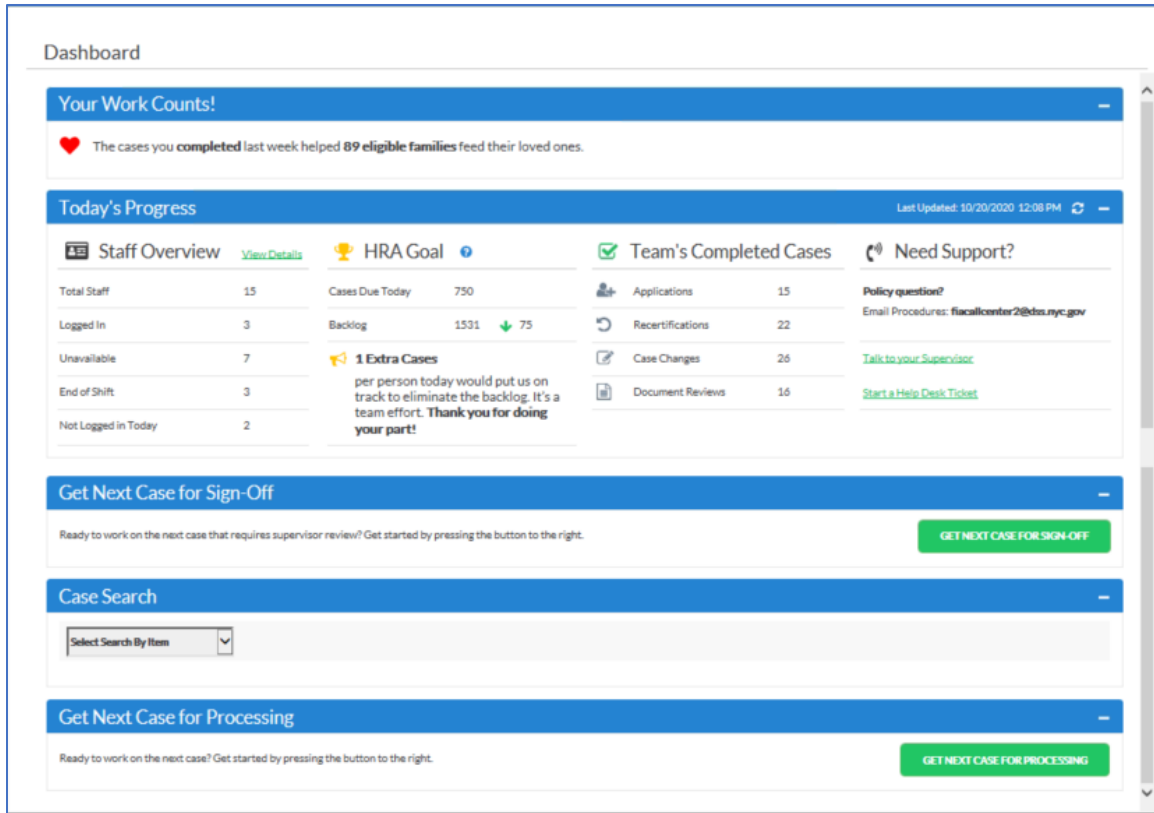
The screen includes the navigation bar on the left-hand side, the title bar with the Supervisor's name and the Tools menu and the main panel with the Supervisor's function, including collapsible widgets showing:

- **Your Work Counts!**
- **Today's Progress**
- **Get Next Case for Sign-off**
- **Case Search**
- **Get Next Case for Processing**

The widgets will contain the name/title of the respective widget. Where applicable, at the title level of the widget will also contain the following:

- **Widget Name:** The name of the respective widget will be displayed.
- **Last Updated:** Last updated timestamp on when the data was last updated in the format: Last Updated: **mm/dd/yy hh:mm AM/PM**
- A refresh button to refresh the data within the widget. Consequently, the last updated timestamp will also be updated.
- A button to Minimize or Maximize the widget.

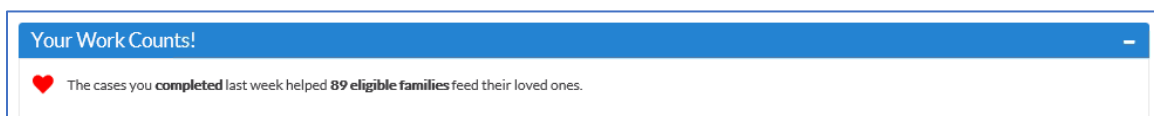
Attachment C Supervisor Role
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3. "Your Work Counts!" & "Today's Progress" Widgets for Supervisor

The **Your Work Counts!** widget provides positive messages for the Supervisor, with information about how many families their team's work helped in the previous week (first message as seen below) and positive messages from applicants and participants. The positive messages are from applicants/participants and will be pulled from reviews of the AHRA mobile app in the App Store / Google Play Store and also from the AHRA site. The comments will be alternating between the first message. The information displayed within this widget gets updated weekly:

- There will be a table with all possible messages that could be displayed from the sources mentioned. This would be a static table that would get refreshed periodically with a new list.
- Each time the Supervisor logs into ANGIE or returns to ANGIE from SPOS, either the "The cases you completed last week helped X eligible families feed their loved ones." or that day's HRA message will be displayed. Selection will be random.



The **Today's Progress** widget for Supervisor consists of four sections including **Staff Overview**, **HRA Goal**, **Team's Completed Cases**, and **Need Support?**. This widget keeps track of the Supervisor's Team performance throughout the day.

The **Staff Overview** section provides information to the Supervisor on their **Total staff**, **Logged in**, **Unavailable**, **End of Shift**, and **Not logged in Today**. The Supervisor can get more details in terms of the Worker Name, Status, Unavailable Reason, and Date & Time by selecting the **View Details** link located in this section to see the screen below.

Today's Progress Last Updated: 10/20/2020 12:08 PM

Staff Overview		HRA Goal		Team's Completed Cases		Need Support?	
Total Staff	15	Cases Due Today	750	Applications	15	Policy question?	Email Procedures: fiacallcenter2@dss.nyc.gov
Logged In	3	Backlog	1531 ↓ 75	Recertifications	22	Talk to your Supervisor	Start a Help Desk Ticket
Unavailable	7	1 Extra Cases per person today would put us on track to eliminate the backlog. It's a team effort. Thank you for doing your part!		Case Changes	26		
End of Shift	3			Document Reviews	16		
Not Logged in Today	2						

Worker Name	Status	Unavailable Reason	Date & Time
	Logged In	NA	10/20/2020 09:10 AM
	Logged In	NA	10/20/2020 08:20 AM
	Logged In	NA	10/20/2020 09:02 AM
	Unavailable	Lunch	10/20/2020 12:02 PM
	Unavailable	Training	10/20/2020 10:00 AM
	Unavailable	Special Project	10/20/2020 11:31 AM
	Unavailable	System Issues	10/20/2020 10:01 AM
	Unavailable	Gonup Meeting	10/20/2020 11:00 AM
	Unavailable	Supervisory Meeting	10/20/2020 10:50 AM
	Unavailable	Other - reason comes here 30 characters limit	10/20/2020 10:20 AM
	End of Shift	NA	10/20/2020 2:00 PM
	End of Shift	N/A	10/20/2020 1:00 PM

The **HRA Goal** section provides information to the Supervisor on the **Cases Due Today** and **Backlog**:

- **Cases Due Today** displays all tasks with a Priority Date of Today
- **Backlog** is displayed as the sum of tasks that are late and overdue.
 - Next to the backlog number, an arrow up (displayed in yellow) shows an increase in cases in the backlog since yesterday,
 - Arrow down (displayed in green) for a decrease in the backlog since yesterday,
 - No arrow at all (just the backlog number) for no increase or decrease in the backlog number. Where there are zero cases in the backlog for more than one day, the number of days that the backlog has been zero will be counted.

- This backlog comparison is comparing the start of day backlog number from yesterday to the start of day backlog number from today.
- The backlog comparison should be calculated at 5:30am each day.
- The backlog counts and comparisons will compare the current workday (business day) against the prior workday (business day). These numbers are not updated on weekends and holidays.
- Below the **Cases Due Today** and **Backlog**, there will be text that switches between the following two messages based on the direction of the backlog change:
 - If backlog is increasing (arrow pointing up) the text will read: “2 extra cases per person today would put us on track to eliminate the backlog. It’s a team effort. Thank you for doing your part!”, the text should be preceded by an exclamation mark inside a yellow triangle
 - If backlog is decreasing (arrow pointing down) the text will read: “1 extra case per person today would put us on track to eliminate the backlog. It’s a team effort. Thank you for doing your part!”, the text will be preceded by a yellow blowhorn icon
 - When there is no backlog for more than one day, text will be displayed as follows: “Don’t lose our record! It’s been X days with no backlog. If everyone meets their goal for today, we can keep the backlog at zero!”, the text will be preceded by a green thumbs up icon

Help Text displayed for HRA Goal:

The screenshot shows a dashboard titled "Today's Progress" with a "Last Updated: 10/20/2020 12:08 PM" timestamp. The dashboard is divided into several sections: "Staff Overview" (with a "View Details" link), "HRA Goal" (with a tooltip), "Team's Completed Cases", and "Need Support?". The "Staff Overview" section includes a table with the following data:

Total Staff	15
Logged In	3
Unavailable	7
End of Shift	3
Not Logged in Today	2

The "HRA Goal" section shows "Cases Due Today" and "Backlog". A tooltip is displayed over the "Backlog" section, explaining that the HRA Goal shows the total number of cases due today and the overall backlog for the program. It also states that the backlog includes cases that have passed their due date and that the number after the arrow shows the change in backlog cases compared to the last workday. The tooltip also notes that if the arrow is yellow, HRA has more cases in the backlog than the last workday, and if it's green, HRA has fewer cases in the backlog than the last workday.

The "Need Support?" section includes a "Policy question?" link, an email address "Email Procedures: fiacallcenter2@dss.nyc.gov", and two links: "Talk to your Supervisor" and "Start a Help Desk Ticket".

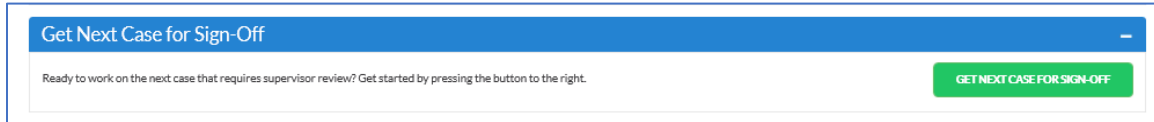
The **Team's Completed Cases** section displays the number of Applications, Recertifications, Case Changes, and Document Reviews the Supervisor's team completed for that day up to the point in which the timestamp is shown in the banner.

The **Need Support?** section provides the email for the Office of Procedures FIA Call Center (fiacallcenter2@dss.nyc.gov) as read-only.

- Clicking on **Talk to your Supervisor** opens **Microsoft Teams**.
- Clicking on **Start a Help Desk Ticket** opens the **Self-Service Incident Form** and allows the staff to report any technical issue they may encounter in ANGIE.

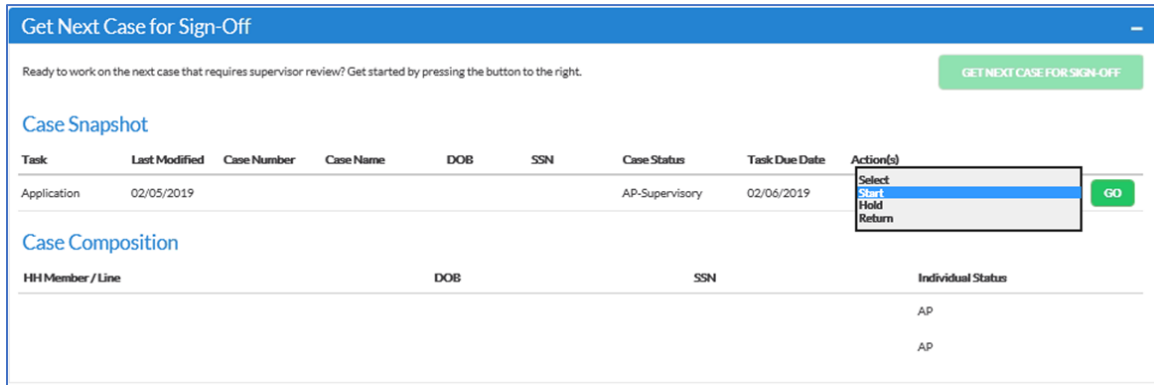
4. Get Next Case for Sign-off: Next Approval Task for Supervisor

The Supervisor will get the next task to approve by selecting the **Get Next Case for Sign-off** button located within the dashboard. The approval tasks that are distributed to the Supervisor will be based on the priority logic.



Once the button is pressed, the Supervisor will be displayed a case profile consisting of **Case Snapshot** and **Case Composition**. The columns for the Case Snapshot section consist of **Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status, Task Due Date, and Action(s)**. The columns for the Case Composition section consist of **HH Member/Line, DOB, SSN, and Individual Status**.

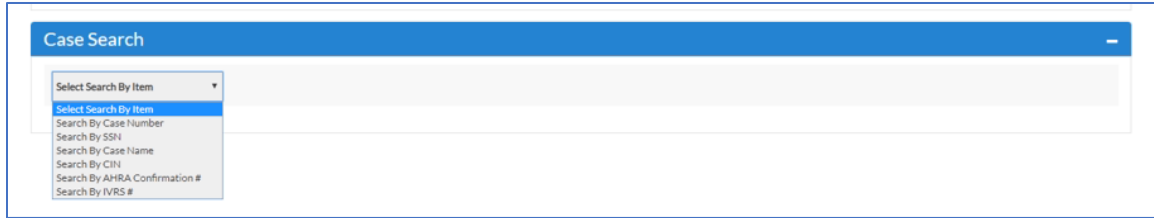
- The Supervisor will be able to start the **Approval** task by selecting the **Start** option within Action(s) dropdown, and then selecting the **GO** button. The ANGIE system will then launch the Streamlined Paperless Office System (SPOS) application for the Supervisor to Approve the respective task.



5. Case Search: Manual Assignment of Tasks

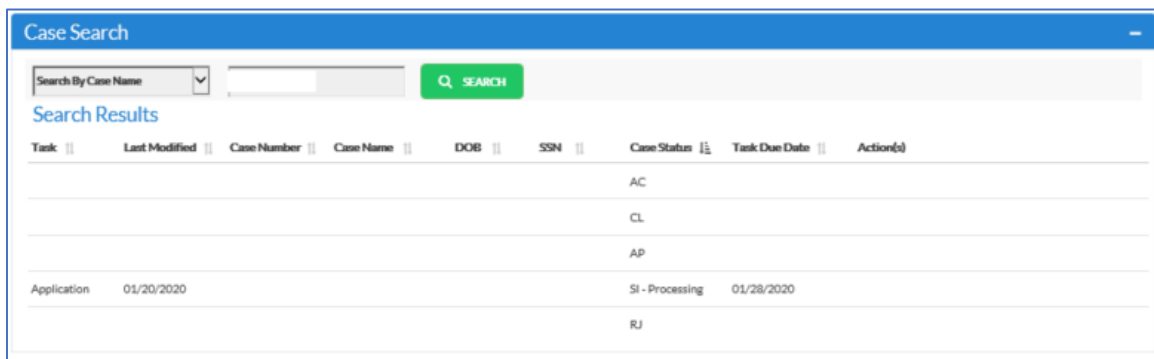
To manually assign a task, the Supervisor must first search for the respective case. The Supervisor can execute a search based on the following criteria:

- **Case Number**
- **SSN**
- **Case Name**
- **CIN**
- **AHRA Confirmation #** (Access Human Resources Administration)
- **IVRS #** (Interactive Voice Response System)



Based on the criteria selected from the dropdown, the Supervisor will be required to enter the corresponding information.

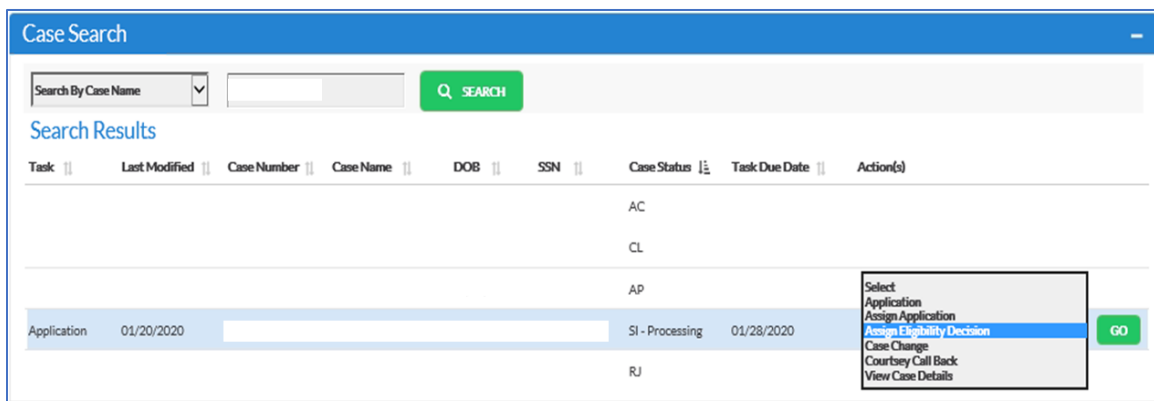
- Upon selecting the **Search** button, the system will display the search results consisting of Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status, Task Due Date and Action(s).



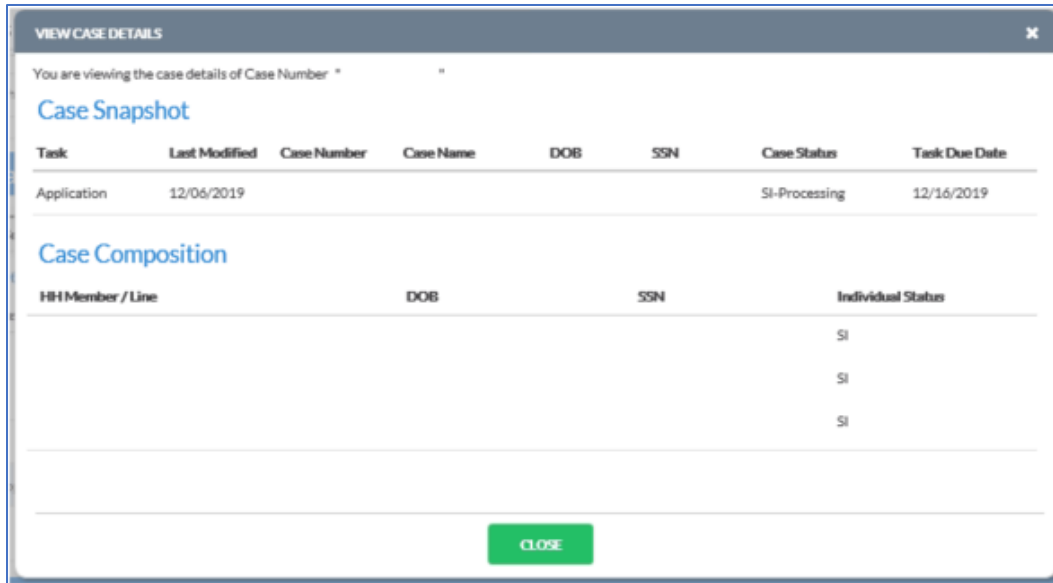
- Selecting the desired row will highlight that row. Once the desired row is selected, the Supervisor can select from available options from the Action(s) dropdown and select **Go** to execute. The options available within the Action(s) dropdown are dependent on the **Case Status** of the Search result. The search process can result in the following three outcomes:
 - (1) **Open Task**
 - Cases with **open task** shall have information in **Task** and **Last Modified** columns of **Search Results** section
 - If the system finds a case with **open task**, it will display this case first in the **Search Results** section
 - If the system finds multiple cases with **open tasks**, it will display these cases first and they will be sorted by earliest date in the **Task Due Date** column
 - (2) **Latest Task**
 - If the system does not return any cases with **open tasks** in the **Search Results** section, the system will initially sort the found cases by **Case Number** column in **Ascending** order.
 - Cases without open task are those where there is no information in the **Task** and **Last Modified** columns of the **Search Results** section
 - (3) **No Task**
 - The system displays the message "No Case found, please refine your search criteria."

The **Search Results Actions(s)** drop-down menu will contain a list of available actions for the Supervisor. These actions will be table-driven. These tables allow control at the following levels:

- Role of Supervisor (there are many titles within 1 role) - SPOS roles will be leveraged to maintain compatibility with POS queues.
- Center designation of the Supervisor.
- Current Welfare Management System (WMS) case status of the selected case in search results.
- List of activities available for the case, based on the case status and open task.



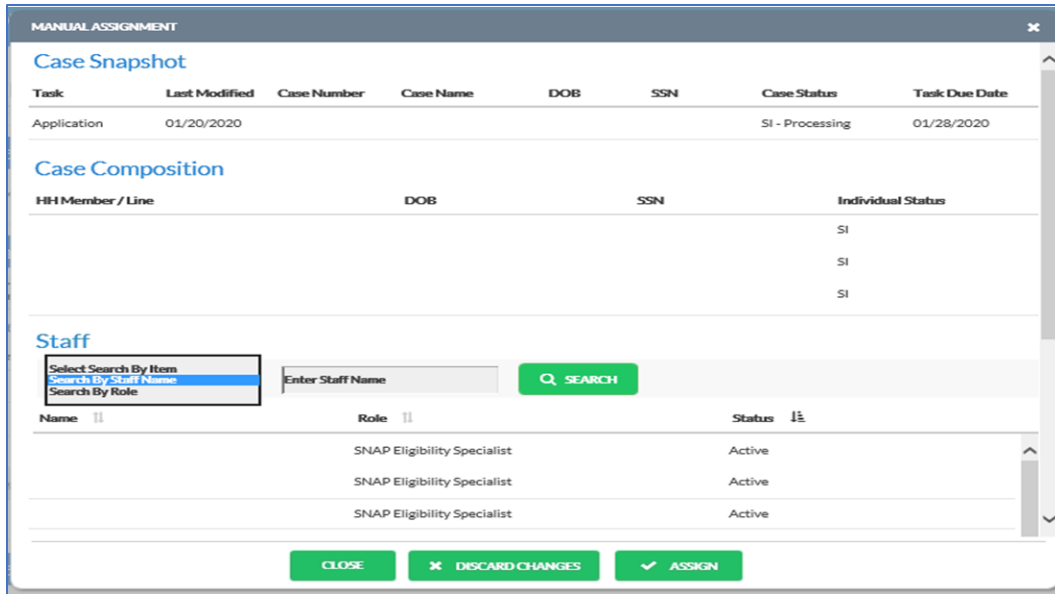
- Selecting the **View Case Details** option from Action(s) and **Go** will result in a modal window with the case profile, consisting of the **Case Snapshot** and **Case Composition**. The columns for the Case Snapshot section consist of **Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status,** and **Task Due Date**. The columns for the Case Composition section consist of **HH Member/Line, DOB, SSN,** and **Individual Status**.



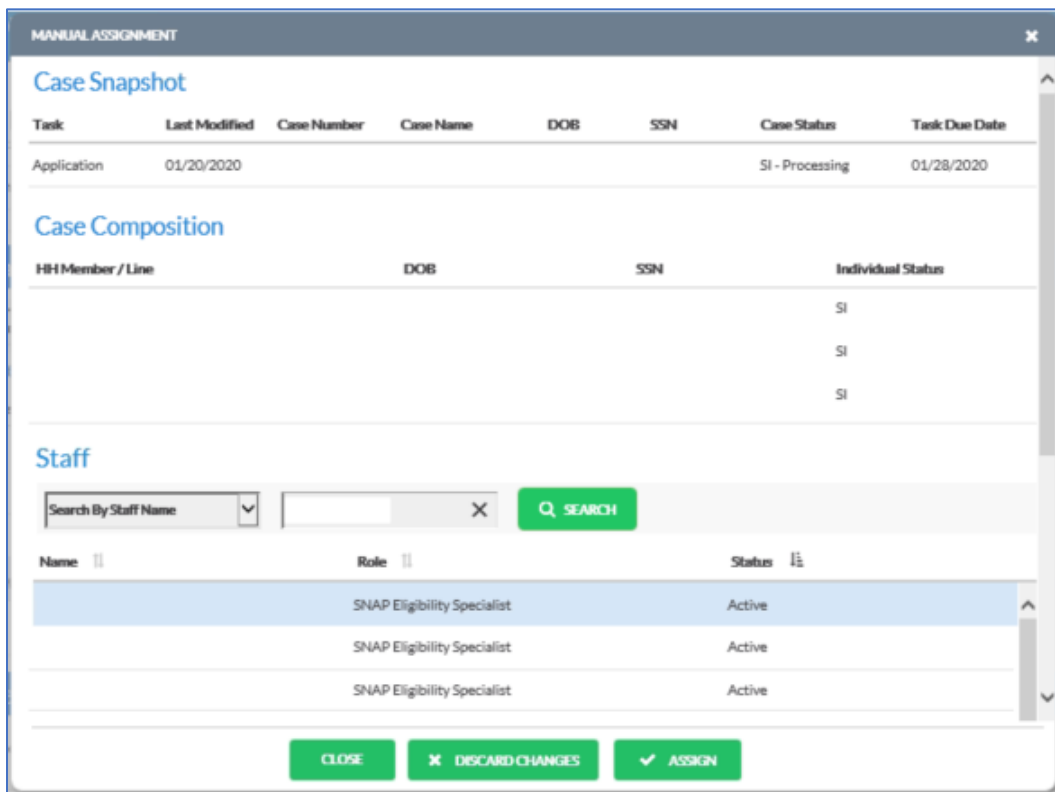
The Supervisor can manually assign tasks by searching for the case and then selecting the **Assign** option from the Actions dropdown.

- Selecting the **Go** button results in a modal window displaying the **Case Snapshot**, **Case Composition**, along with the **Staff** section as seen below. The columns for the Case Snapshot section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, and **Task Due Date**. The columns for the Case Composition section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**. Within the Staff section, the Supervisor can search for the Staff based on **Staff Name** or **Role** and then select the intended staff within the grid. If Name is selected, then the Supervisor is required to enter the name as seen below. If Role is selected, the Supervisor is required to select an option from the Role dropdown consisting of **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, or **Clerical Associate**. Selecting the **Search** button will display the search results in the grid. The sortable columns displayed in the Staff section include **Name**, **Role**, and **Status**.

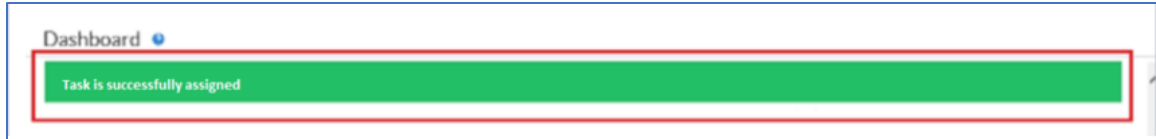
Attachment C Supervisor Role
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- Once a row is selected for the intended staff, it will highlight that row and selecting the **Assign** button will assign the task to that staff.



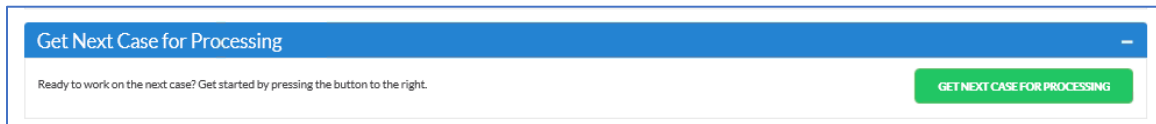
A green banner will be displayed to inform the Supervisor that the task has been successfully assigned.



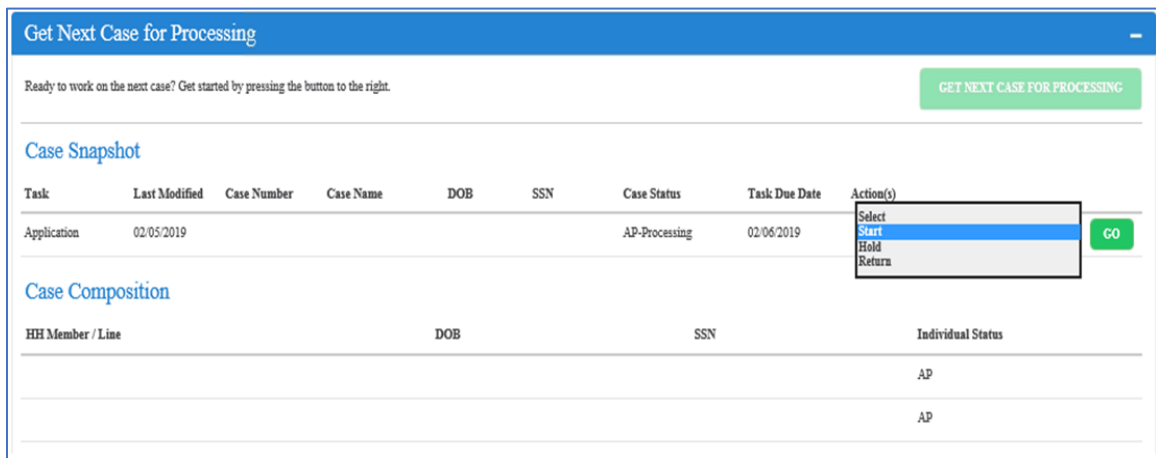
6. Get Next Case for Processing for Supervisor

The Supervisor can step down to the role of the Eligibility Specialist and function as an Eligibility Specialist. The tasks that are distributed to Supervisors within this widget, are non-approval tasks. This function will allow the Supervisor to help the Eligibility Specialists perform their tasks when additional person power is needed.

- Selecting the **Get Next Case for Processing** button located within the dashboard will systemically assign a non-approval task based on the priority logic.



- Once the button is clicked, the Supervisor will be displayed with a case profile consisting of **Case Snapshot** and **Case Composition** as seen below. The columns for the Case Snapshot section consist of **Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status, Task Due Date** and **Action(s)**. The columns for the Case Composition section consist of **HH Member/Line, DOB, SSN, and Individual Status**.
- The Supervisor will be able to start the task by selecting the **Start** option within **Action(s)** dropdown, and then selecting the **GO** button. The ANGIE system will then launch the SPOS application for the Supervisor to work on the respective task.

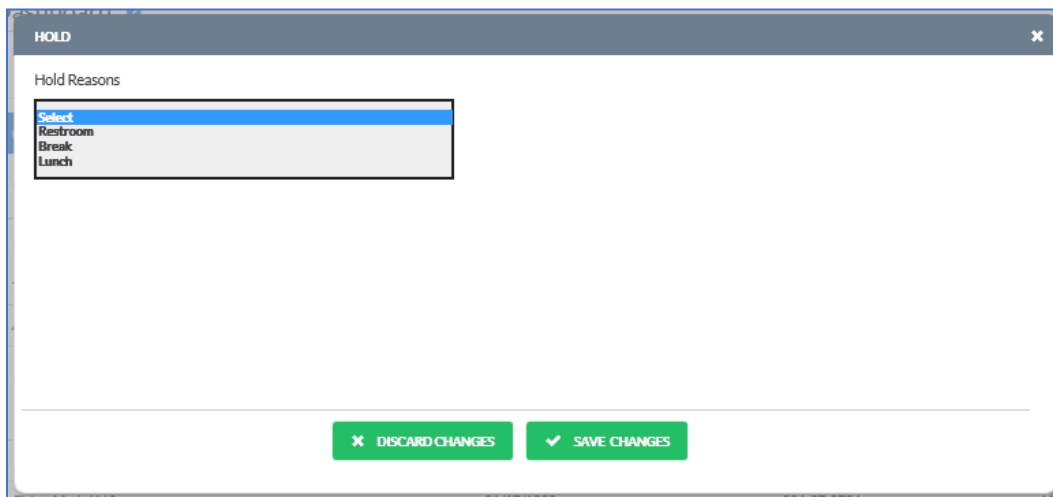


7. Hold or Return Task

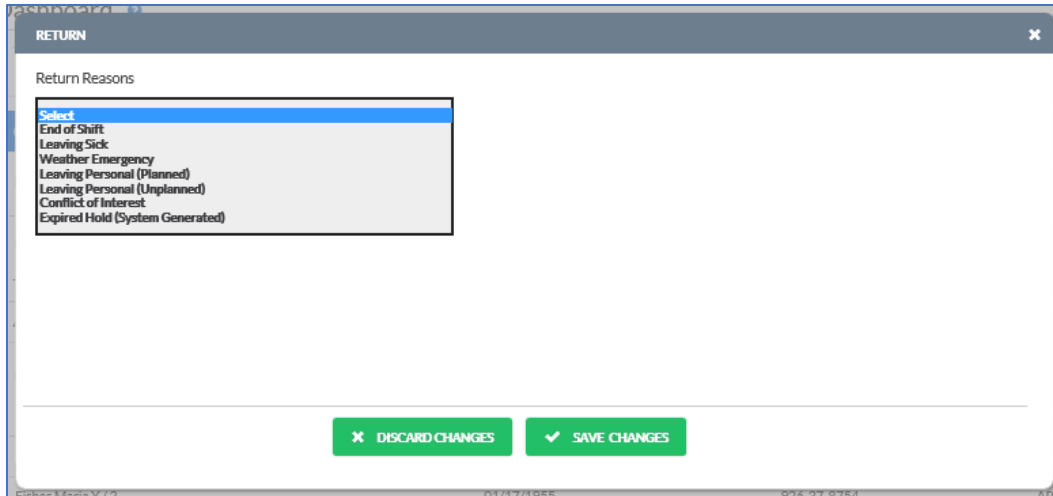
The Supervisor can execute a **Hold** or **Return** on a task and is applicable to both the **Get Next Case for Processing** and **Get Next Case for Sign-Off** widgets.

- The Supervisor can execute a hold on a task by selecting the **Hold** option from the Action(s) dropdown and selecting the **Go** button. The Supervisor will be displayed with a modal window and is required to select from the available Hold Reasons (**Restroom**, **Break**, **Lunch**). Once the Supervisor selects the applicable hold reason and then selects **Save Changes**, the hold will be applied on the respective task for a set time (2 hours), for that Supervisor.

Note that the Supervisor cannot work on another “prioritized task” until the hold task is worked on. If the Supervisor returns within the set time, the Supervisor will be provided with the same task upon selecting the **Get Next Case for Processing** button. If the hold time lapses, then the task will be placed back in the general pool and another Supervisor may have access to that task.



- The Supervisor can return a task by selecting the **Return** option from the Action(s) dropdown and selecting the **Go** button. The Supervisor will be displayed with a modal window and is required to select from the available Return Reasons (**End of Shift**, **Leaving Sick**, **Weather Emergency**, **Leaving Personal (Planned)**, **Leaving Personal (Unplanned)**, **Conflict of Interest**, **Expired Hold (System Generated)**).
- After selecting the applicable return reason and selecting the **Save Changes** button, the task will be returned to the general pool and another Supervisor can get the task.



8. Team Performance Page for Supervisor

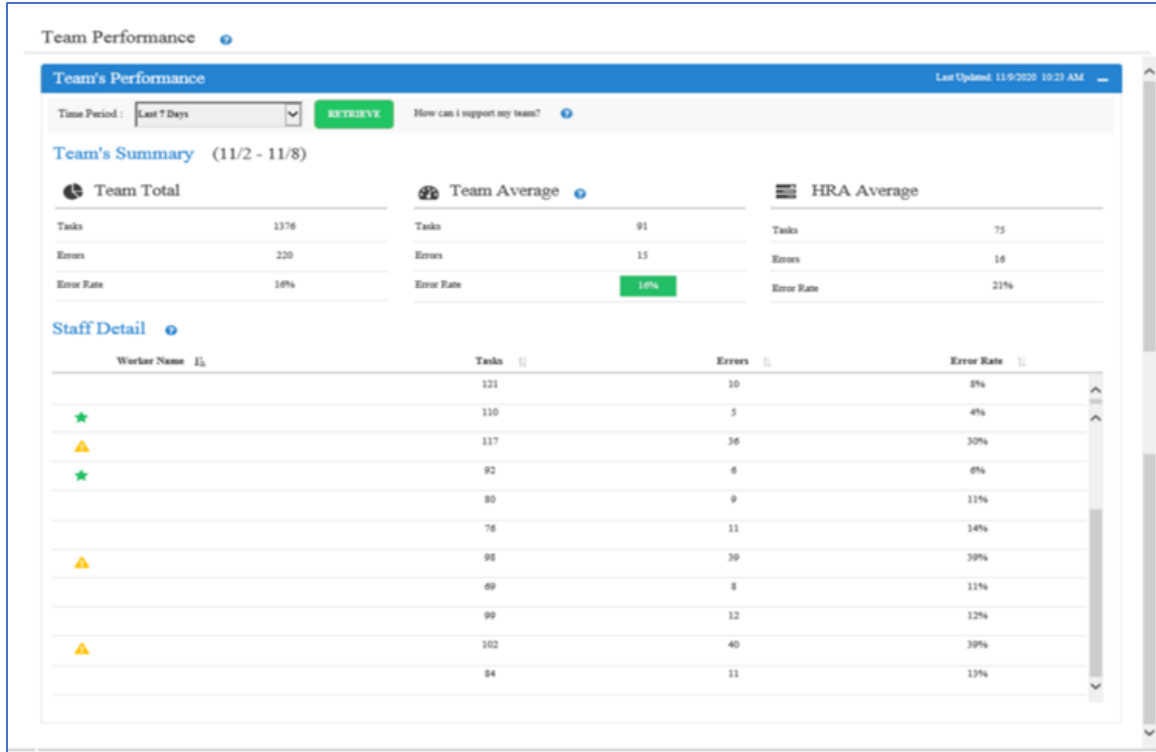
The Supervisor can access their **Team Performance** page from the left navigation pane. This page will provide metrics to gage the team's performance. The supervisor is required to select the timeframe for the report to generate and can choose from **Last 7 Days**, **Last 30 Days**, or **Last 90 Days**.

- Once the desired timeframe is selected, selecting the **Retrieve** button will display the corresponding results.

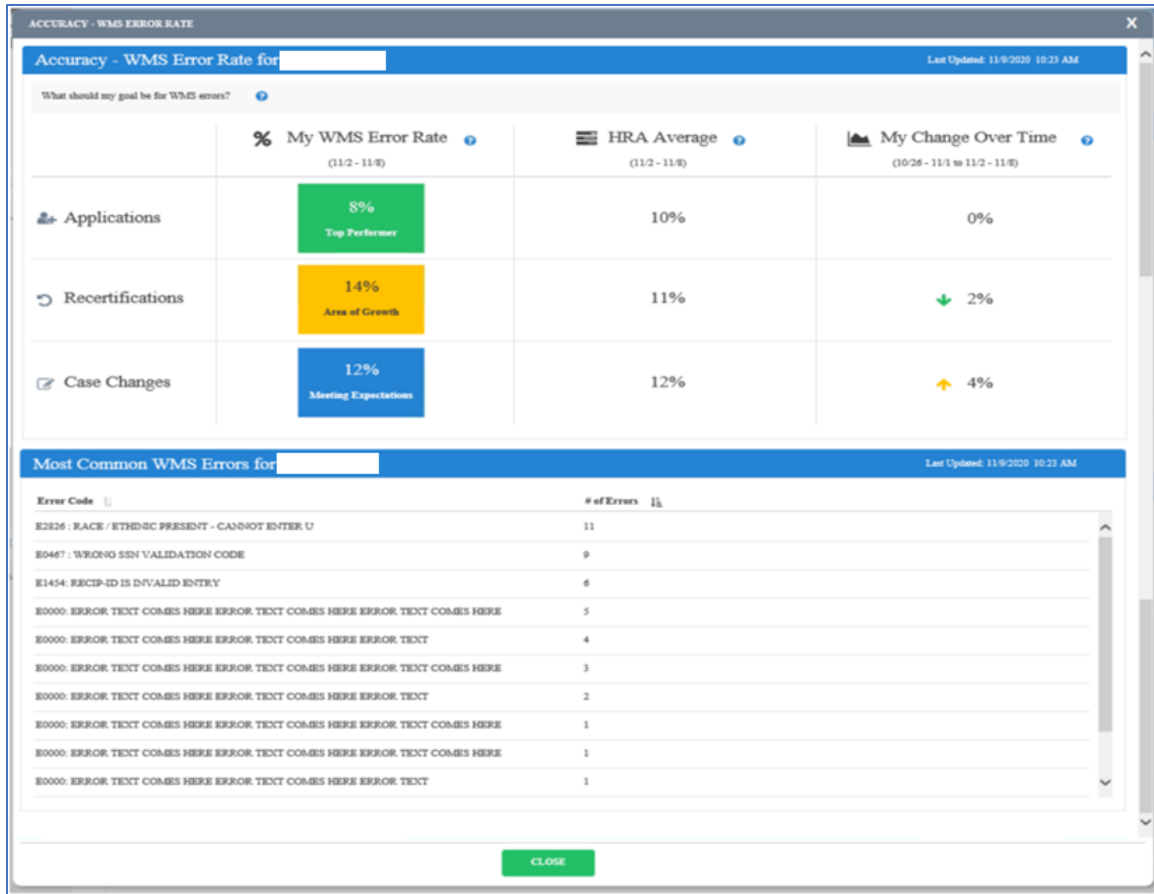
The **Team's Summary** section of the page consists of three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, and **Error rate** as a percentage. The **Error Rate** for the **Team Average** table will be displayed within green box, yellow box, or blue box to indicate if the team's WMS Error Rate is above, below, or same as the HRA Average respectively.

The **Staff Detail** section of the page will contain information on all the staff that reports to the respective Supervisor and includes **Worker Name**, **Tasks**, **Error**, and **Error Rate**. Colored icons are displayed to the left of the Worker Name to provide context on staff that are performing exceptionally well (green star) or performing poorly (yellow warning). The green star icon (indicating the positive) will display if the Team member is performing above the HRA Average (85th percentile or above). The yellow warning icon (indicating the negative) will display if the Team member is performing below the HRA Average (15th percentile or below).

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The **Errors** and **Error Rate** values for the respective Eligibility Specialist are links that the Supervisor can select to view the Performance page of the selected Eligibility Specialist. The name of the respective Eligibility Specialist will be displayed on the widgets as seen below.



The Eligibility Specialist view will contain the name of the selected Eligibility Specialist on the widgets **Accuracy – WMS Error Rate** and **Most Common WMS Errors**.

The **Accuracy - WMS Error Rate** widget provides Error Rates on the **Applications**, **Recertifications**, and **Case Changes** worked on by the selected Eligibility Specialist for the set timeframe. The table provides Error Rates on the **Applications**, **Recertifications**, and **Case Changes** worked on by the Eligibility Specialist for the set timeframe. It provides information on the selected Eligibility Specialist's performance in terms of their own **Error Rate** (displayed within **My WMS Error Rate**), HRA Average Error Rate (displayed with **HRA Average**), and keeps track of the Eligibility Specialist's current Error Rate over the previous period (displayed within **My Change Over Time**).

My WMS Error Rate column:

- At the header level, the actual dates for the timeframe selected is displayed below the **My WMS Error Rate** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- If the Eligibility Specialist's error rate for the selected period is less than 1 Standard Deviation above the HRA mean, the header shall read **Top Performer** colored in a green color block.

- If the Eligibility Specialist's **Error Rate** for the selected period is within one Standard Deviation of the HRA mean, the header shall read **Meeting Expectations** colored in a blue color block.
- If the Eligibility Specialist's **Error Rate** for the selected period is more than one Standard Deviation below the HRA mean, the header shall read **Area for Growth** colored in a yellow color block.

HRA Average column:

- At the header level, the actual dates for the selected time period is displayed below the **HRA Average** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- Shows the average **WMS Error Rate** for all other Eligibility Specialists for the selected time across each Task Type (Applications, Recertifications, and Case Changes)

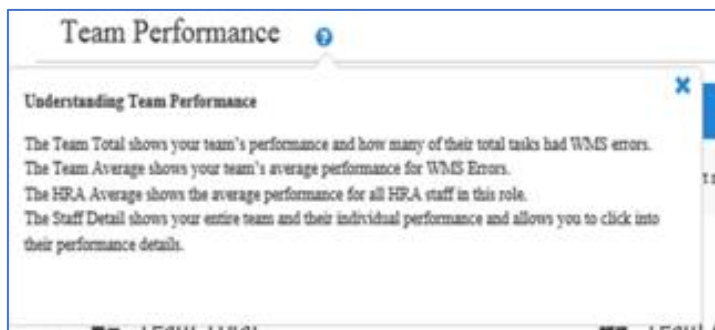
My Change over Time column:

- At the header level, the actual dates for the previous time period are displayed below the **My Change Over Time** column in the following format: [previous timeframe to current timeframe in the following date format: mm/dd – mm/dd to mm/dd - mm/dd]
- If this period's **Error Rate** is below that of the last period, there will be a green arrow pointing downwards, followed by the change in percent.
- If this week's **Error Rate** is the same from the last week, it will only display "0%".
- If this week's **Error Rate** is above that from the last week, there will be a yellow arrow pointing upwards, followed by the change in percent.

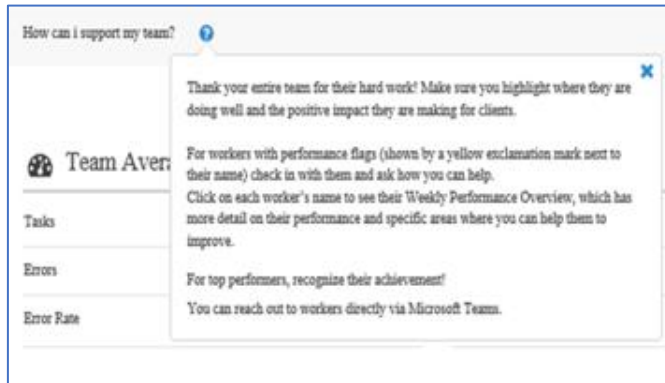
My Most Common WMS Errors widget has a summary table of the selected Eligibility Specialist's most common Errors. The table consists of two columns. The **Error Code** column shows the name of the WMS Error(s). The **# of Errors** column shows the count of the number of corresponding **WMS Errors** the Eligibility Specialist had for the previous week. Both columns are sortable.

- Selecting **Close** will return to the **Team Performance** page of the Supervisor.

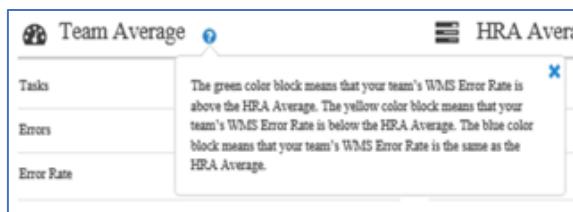
Team Performance Help Text:



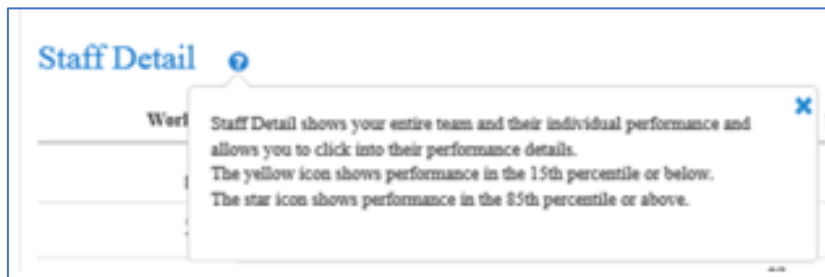
How can I support my team? Help Text:



Team Average Help Text:



Staff Detail Help Text:



9. Team's Daily Activity for Supervisor

The Supervisor can access their **Team's Daily Activity** for the specific day from the left navigation pane. This page provides the Supervisor with a summary of their team's daily activity as a snapshot of their work for a specific day, so that the supervisor can be more informed of their team's daily activity.

The **Activity Summary** widget consists of Staff Overview, Tasks Status, and Tasks Completed. The **Staff Overview** table provides an inventory of the Total Staff, Logged In, Unavailable, End of Shift, and Not Logged in Today. The **Tasks Status** table provides information on the number of tasks that are Initiated, In Progress, Incomplete, and Complete. The **Tasks Completed** table provides the number of tasks that are completed for Interviews, Applications, Recertifications, Case Changes, and Document Reviews.

Attachment C Supervisor Role
ANGIE Release 1 Notes

Team's Daily Activity ?

Activity Summary Last Updated: 10/20/2020 10:23 AM

Staff Overview View Details		Tasks Status		Tasks Completed	
Total Staff	15	Initiated	121	Interviews	19
Logged In	3	In Progress	5	Applications	15
Unavailable	7	Incomplete	18	Recertifications	22
End of Shift	3	Complete	98	Case Changes	26
Not Logged in Today	2			Document Reviews	16

Activity Detail Last Updated: 10/20/2020 10:23 AM

Worker Name	Tasks In Progress	Tasks Incomplete	Tasks Complete	Interview	Application	Recertification	Case Change	Document Reviews
	1	2	3	1	0	1	1	0
	0	1	8	2	1	1	2	2
	0	1	9	2	1	2	3	1
	0	2	7	2	1	2	2	0
	0	3	11	2	1	2	3	3
	0	1	7	1	2	1	3	0
	1	2	8	2	2	1	1	2
	1	1	4	1	0	0	3	0
	0	1	7	1	1	0	2	3
	1	0	1	0	0	1	0	0
	0	1	9	2	2	1	2	2
Total	5	18	98	19	15	22	26	16

Help Text for the Team's Daily Activity page:

Team's Daily Activity ?

Team's Daily Activity is a dashboard that shows an overview of the staff available on your team, the status of all their initiated tasks, and a breakdown of their completed tasks. Activity Details shows an overview of each individual staff member's activity; click on their name to see more details in their individual Daily Activity Sheet.

A **View Details** link is provided within the Staff Overview table that will provide details of staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**. The modal window that displays is seen below.

Attachment C Supervisor Role
ANGIE Release 1 Notes

Worker Name	Status	Unavailable Reason	Date & Time
	Logged In	NA	10/20/2020 09:10 AM
	Logged In	NA	10/20/2020 08:20 AM
	Logged In	NA	10/20/2020 09:02 AM
	Unavailable	Lunch	10/20/2020 12:02 PM
	Unavailable	Training	10/20/2020 10:00 AM
	Unavailable	Special Project	10/20/2020 11:31 AM
	Unavailable	System Issues	10/20/2020 10:01 AM
	Unavailable	Group Meeting	10/20/2020 11:00 AM
	Unavailable	Supervisory Meeting	10/20/2020 10:50 AM
	Unavailable	Other - reason comes here 30 characters limit	10/20/2020 10:20 AM
	End of Shift	NA	10/20/2020 2:00 PM
	End of Shift	NA	10/20/2020 2:00 PM

The **Activity Detail** widget displays a table containing information relating to all of the Eligibility Specialists that report to the respective Supervisor. The **Worker Name** column of this table are hyperlinks for the Supervisor.

- The Supervisor can click the hyperlink and view the respective Eligibility Specialist’s Daily Activity Sheet as seen below.

Status	Start Time	Case Number	Case Name	Start Event	WMS Status	End Event	Decision	HH Size	Duration (Mins)
✓	09:06 AM			Application - Start Interview	AP	Complete Interview - Deferred for Verification	AC-A30	6	40
⚠	09:48 AM			Application - ESNAP Processing	AP	Suspend Processing	AC-A30	6	22
✓	10:18 AM			Change Case - Change Case Ready	AC	Deferred/Pending Change Verification	AC-832	4	21
⚠	10:42 AM			Application - Start Interview	AP	Suspend Interview	AP-	3	15
✓	11:04 AM			Recertification - Mandated Verification Received - Full	AC	Complete Processing	AC-A30	8	30
📄	11:35 AM			Document Review - Start Document Review	AC	NA	AC-A30	5	-

The name of the selected Eligibility Specialist is seen on the **Daily Activity Sheet** widget. Selecting the **Back to Summary** button at the bottom of the page will return the Supervisor to the Team’s Daily Activity page.

The **Daily Activity Sheet** widget keeps track of and displays a summary of the Eligibility Specialist’s daily activity as a snapshot of the work completed for the current day. This allows the Eligibility Specialist to keep track of their work and in addition allows the Supervisor to review the respective Eligibility Specialist’s daily progress. The Daily Activity Sheet provides information on the Status, Start Time, Case Number, Case Name, Start Event, WMS Status, End Event, Decision, HH Size, and Duration (Mins):

- **Status:** The icons within this column provide context at a glance for tasks that are **Completed** (green check), **Suspended** (yellow exclamation point) and **In-Progress** (blue hourglass).
 - For an Interview, the Status is Incomplete if the end event is **Suspend Interview**. Otherwise, the interview is complete.
 - For **processing actions**, the status is incomplete if the end event is **Suspend Processing** and the task status is not **Pending**. Otherwise, it is complete.
 - When an event is currently **In-Progress**:
 - Duration column for that row will display a dash (minus sign).
 - End Event column for that row will display “**N/A**”.
- **Start Time:**
 - Displays the time that the event was started in the format: **hh:mm AM/PM**
 - The default view will be based on the ascending order of Start Time.
- **Case Number:** This is the Case Number associated with the case.
- **Case Name:** This is the WMS Case Name.
- **Start Event:** This is a combination of Task Type & the following elements:
 - For **Application** and **Recertification** Task:
 - Interview Started - If an Interview was either distributed from Get Next or started from Case Search, the element will display “Interview Started”.
 - Ready to Assign Event - For any case that was distributed and started from the Get Next button, the Ready to Assign Event will be displayed. For example, “Mandated Verification Received – Full” event.
 - SPOS Activity - For any Events that were started from Case Search, the SPOS Activity must be used. For example, “Application Modification”, “Make Case Comment”, etc.
 - For **Change Case:** The start event is typically: “Change Case Ready” (if started from Get Next) or “Start Processing” (if started from Case search).
 - For **Document Review**, the start event is always: “Start Document Review”.
- **WMS Status:** The existing WMS case status (starting state) - AP, RJ, SI, AC, CL.
- **End Event:** The final event that is triggered by the Eligibility Specialist's action. This data comes from the **Event Log**.
 - For any start events in the status of **Interview** in the **Event Log**, the End Event is always either: Suspend Interview, Complete Interview.
 - For **Change Case** events, the system must check whether a Deferral was made in the **Pending** status events; if yes, then the end event is “Deferred/Pending Change Verification”. Otherwise, the last event with a status of **Processing** is used.
 - For other **Processing-related** start events other than **Change Case**, the End Event is recorded when the Processors finish their action in SPOS (last event with a status of **Processing** for the Eligibility Specialist).
 - The End Event can be Complete interview, Suspend processing or Complete processing. The End events will be further distinguished to have the exact

outcome, with the possible values displayed below. The event log will also get updated accordingly.

1. Complete Interview - No deferral
Complete Interview - Deferred for verification
Complete Interview - Deferred for IVS/RFI/SDX
Complete Interview - Deferred for verification and IVS/RFI/SDX

NOTE: For the Interview, the End Event will be the latest event in status of Interview

2. Suspend Processing - Deferred for change verification

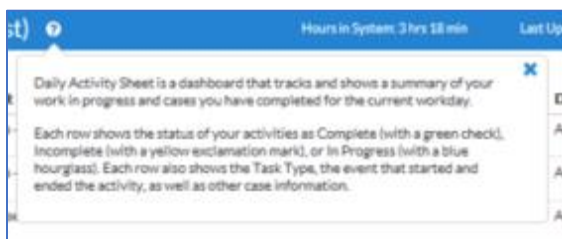
NOTE: For processing actions, the end event will be the latest event in status of Processing

- For cases that are “In Progress”, the End Event column should reflect N/A for the respective row.
- **Decision:** This is the Status and Reason Code selected in SPOS (End State), as it represents the action that the Eligibility Specialist took on the case to end their processing and reach a case outcome.
 - The decoded value is needed. For example: AC-A30 (Same Approval each month), RJ-V21 (Failure to Provide Verification), SI-Q22 (Expedited Pending Verification).
 - The description of the code will not be included.
 - If there is no SPOS decision code, then the reason code will be blank. For example, “AP- “, “AC-“
- **HH Size:** Number of people in AP, SI or AC status in associated with the WMS case.
- **Duration (Min):** This value will be the time, in minutes, it takes an Eligibility Specialist to process the task/activity on the case.
 - For cases that are “In Progress”, the duration field will be a dash (minus sign) for the respective row.

At the header level of the widget shows the time the selected Eligibility Specialist has spent in the ANGIE system in the format: **Hours in System: X hrs YY min**

- Selection of the refresh button at the header of this widget will refresh the data for the Daily Activity widget. Consequently, the last updated timestamp will also update.

Help Text on Eligibility Specialist’s Daily Activity Sheet:



Manager Role

ANGIE Release 1 Notes

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1. Document Objective

The objective of this document is to provide context on the screens for the Manager role within the Activity and General Information Exchange (ANGIE). The layout of the ANGIE dashboard for the Manager will allow the logical completion of the activities related to the role and consume the necessary information for the role.

2. Home Page: Dashboard for Manager

Upon login, the landing screen in ANGIE will be the **Dashboard** page. This screen will allow the Manager to view their progress, keep track of their team's progress, access their next priority task and search for cases. It will replace the individual's POS queue. The screen includes the navigation bar on the left-hand side, the title bar with the Manager's name and the Tools menu and the main panel with the Manager's function, including collapsible widgets showing:

- **Your Work Counts!**
- **Team Progress**
- **Work Outstanding**
- **Case Search**
- **Get Next Case for Sign-off**
- **Get Next Case for Processing**

The widgets will contain the name/title of the respective widget. Where applicable, at the title level of the widget will also contain the following:

- **Widget Name:** The name of the respective widget will be displayed.
- **Last Updated:** Last updated timestamp on when the data was last updated in the format: Last Updated: **mm/dd/yy hh:mm AM/PM**
- A refresh button to refresh the data within the widget. Consequently, the last updated timestamp will also be updated.
- A button to Minimize or Maximize the widget.

Attachment D Manager Role
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The screenshot shows a dashboard with several sections:

- Your Work Counts!**: A blue header with a red heart icon and text: "The cases you completed last week helped 1881 eligible families feed their loved ones."
- Team Progress**: A blue header with "Last Updated: 10/20/2020 12:08 PM". It contains:
 - Staff Overview**: A table with metrics like Total Staff (118), Logged In (63), Unavailable (36), End of Shift (7), and Not Logged in Today (12).
 - HRA Goal**: A section with a trophy icon and a blue circle, containing "Cases Due Today: 750" and "Backlog: 0". Below it is a green message: "Don't lose our record! It's been 12 days with no backlog. If everyone meets their goal for today, we can keep the backlog at zero!"
 - Team's Completed Cases**: A table with categories: Applications (109), Recertifications (79), Case Changes (82), and Document Reviews (107).
 - Need Support?**: A section with "Policy question?" and "Email Procedures: ffacallcenter2@dcsv.nyc.gov". It includes links for "Talk to your Supervisor" and "Start a Help Desk Ticket".
- Work Outstanding**: A blue header with "Last Updated: 10/20/2020 11:50 AM". It contains a table:

Task	Potential Work	Open Task	Deferred	ES Ready	Sup Ready	Total Open Work	Xmitted WMS	Pending WMS	Completed
All Tasks	255	98	96	145	107	446	89	377	225
Today	0	12	12	29	16	69	19	82	45
Urgent	0	7	7	14	8	36	30	50	41
Backlog	0	56	56	57	56	225	50	184	90
- Case Search**: A blue header with a dropdown menu labeled "Select Search By Item".
- Get Next Case for Sign-Off**: A blue header with a green button labeled "GET NEXT CASE FOR SIGN-OFF". Below it is the text: "Ready to work on the next case that requires supervisor review? Get started by pressing the button to the right."
- Get Next Case for Processing**: A blue header with a green button labeled "GET NEXT CASE FOR PROCESSING". Below it is the text: "Ready to work on the next case? Get started by pressing the button to the right."

3. "Your Work Counts!" & "Today's Progress" Widgets for Manager

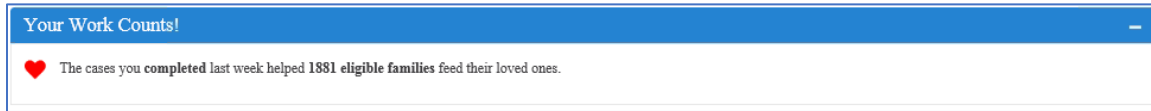
The **Your Work Counts!** widget provides positive messages for the Manager, with information about how many families their team's work helped in the previous week (first message as seen below) and positive messages from applicants and participants.

The positive messages are from applicants/participants and will be pulled from reviews of the AHRA mobile app in the App Store / Google Play store and also from AHRA site. The comments will be alternating between the first message. The information displayed within this widget gets updated weekly.

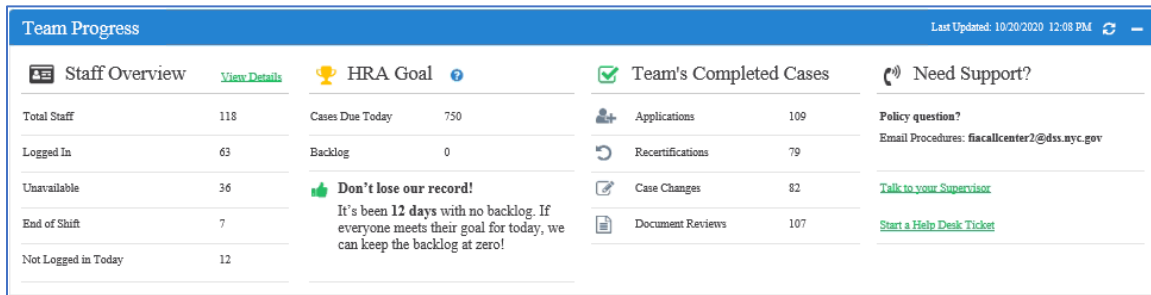
- There will be a table with all possible messages that could be displayed from the sources mentioned. This would be a static table that would get refreshed periodically with a new list.
- Each time the Manager logs into ANGIE or returns to ANGIE from SPOS, either the "The cases you completed last week helped X eligible families feed

Attachment D Manager Role
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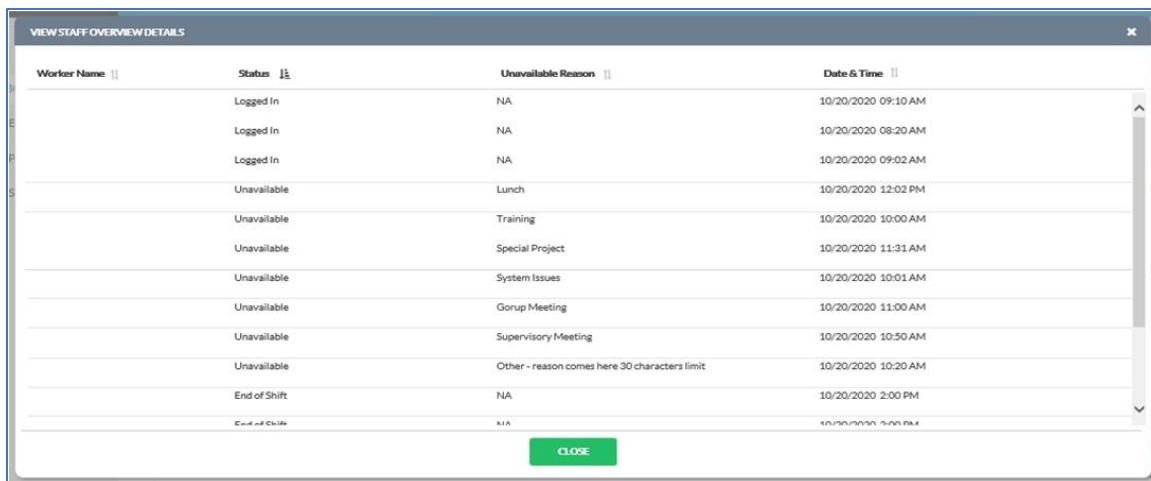
their loved ones.” or that day’s HRA message will be displayed. Selection will be random.



Team progress widget for the Manager consists of four sections including **Staff Overview**, **HRA Goal**, **Team’s Completed Cases**, and **Need Support?**. This widget keeps track of the Manager’s Team progress throughout the day.



The **Staff Overview** section provides information to the Manager on their **Total Staff**, **Logged In**, **Unavailable**, **End of Shift**, and **Not logged in Today**. The Manager can get more details in terms of the Worker Name, Status, Unavailable Reason, and Date & Time by selecting the **View Details** link located in this section as seen above, which opens the **Details** screen below.



The **HRA Goal** section provides information to the Manager on the **Cases Due Today** and **Backlog**:

- **Cases Due Today** displays all tasks with a Priority Date of Today.
- **Backlog** is displayed as the sum of tasks that are late and overdue.

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- Next to the backlog number, an arrow up (displayed in yellow) shows an increase in cases in the backlog since yesterday,
- Arrow down (displayed in green) for a decrease in the backlog since yesterday,
- No arrow at all (just the backlog number) for no increase or decrease in the backlog number. Where there are zero cases in the backlog for more than one day, the number of days that the backlog has been zero will be counted.
 - This backlog comparison is comparing the start of day backlog number from yesterday to the start of day backlog number from today.
 - The backlog comparison will be calculated at 5:30am each day.
 - The backlog counts and comparisons will compare the current workday (business day) against the prior workday (business day). These numbers are not updated on weekends and holidays.
- Below the **Cases Due Today** and **Backlog**, there will be text that switches between the following two messages based on the direction of the backlog change:
 - If backlog is increasing (arrow pointing up) the text will read: “2 extra cases per person today would put us on track to eliminate the backlog. It’s a team effort. Thank you for doing your part!”, the text will be preceded by an exclamation mark in yellow triangle.
 - If backlog is decreasing (arrow pointing down) the text will read: “1 extra case per person today would put us on track to eliminate the backlog. It’s a team effort. Thank you for doing your part!”, the text will be preceded by a yellow blowhorn icon.
 - Where there is no backlog for more than 1 day, text will be displayed as follows: “Don’t lose our record! It’s been X days with no backlog. If everyone meets their goal for today, we can keep the backlog at zero!”, the text will be preceded by a green thumbs up icon.

Help Text displayed for HRA Goal:

The screenshot shows a 'Team Progress' dashboard. At the top right, it says 'Last Updated: 10/20/2020 12:08 PM'. Below the header, there are several tabs: 'Staff Overview', 'View Details', 'HRA Goal', 'Team's Completed Cases', and 'Need Support?'. The 'HRA Goal' tab is active. On the left, there is a table with staff metrics: Total Staff (118), Logged In (63), Unavailable (36), End of Shift (7), and Not Logged in Today (12). The 'HRA Goal' section shows 'Cases Due Today' and 'Backlog'. A tooltip is displayed over the 'Backlog' section, containing the following text: 'HRA Goal shows the total number of cases due today and the overall backlog for your program. Backlog includes the cases that have passed their due date. If there is an arrow next to the Backlog number, it shows a change in the backlog compared to the last workday. The number after the arrow shows the change in backlog cases. If it's yellow, HRA has more cases in the backlog than the last workday. If it's green, HRA has fewer cases in the backlog than the last workday.' Below this tooltip, there is a message: 'Don't lose our record! It's been 12 days everyone meets their goal for today, we can keep the backlog at zero!' with a green thumbs up icon. To the right of the HRA Goal section, there is a 'Need Support?' section with links for 'Policy question?', 'Email Procedures: fiscalcenter2@dss.nyc.gov', 'Talk to your Supervisor', and 'Start a Help Desk Ticket'.

The **Team's Completed Cases** section displays the number of Applications, Recertifications, Case Changes, and Document Reviews the Manager's team completed for that day up to the point in which the timestamp is shown in the banner.

The **Need Support?** section provides the email for the Office of Procedures Call Center (fiacallcenter2@dss.nyc.gov) as read-only.

Click on **Talk to your Supervisor** to open **Microsoft Teams**.
Click on **Start a Help Desk Ticket** to open the **Self-Service Incident Form** and allow the staff to report any technical issue they may encounter in ANGIE.

4. Work Outstanding Widget in the Manager Dashboard

The **Work Outstanding** widget shows the ANGIE work that is outstanding by criticality so that the Manager can review what remains ahead and what was completed. The data shown in the dashboard includes **All Tasks** consisting of rows for **Today** (Priority Date Today), **Urgent** (Late, past Priority Date before/including Task Due Date), and **Backlog** (Overdue, past Task Due Date). The data is split across columns for Potential Work, Open Task, Deferred, ES Ready, Sup Ready, Total Open Work, Xmitted WMS, Pending WMS, and Completed.

Work Outstanding Last Updated: 10/20/2020 11:50 AM									
Task	Potential Work	Open Task	Deferred	ES Ready	Sup Ready	Total Open Work	Xmitted WMS	Pending WMS	Completed
All Tasks	255	98	96	145	107	446	89	377	225
Today	0	12	12	29	16	69	19	82	45
Urgent	0	7	7	14	8	36	30	50	41
Backlog	0	56	56	57	56	225	50	184	90

Help Text for the Work Outstanding:

Work Outstanding Last Updated: 10/20/2020 11:50 AM									
Task	Potential Work	Open Task	Deferred	ES Ready	Sup Ready	Total Open Work	Xmitted WMS	Pending WMS	Completed
All Tasks	255	98	96	145	107	446	89	377	225
Today	0	12	12	29	16	69	19	82	45
Urgent	0	7	7	14	8	36	30	50	41
Backlog	0	56	56	57	56	225	50	184	90

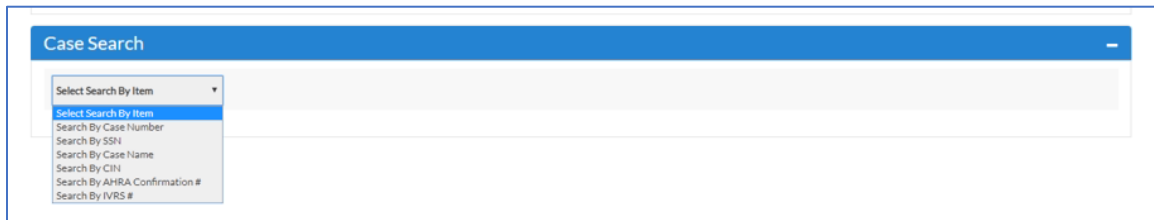
Work Outstanding shows the number of tasks that are due today, will be due soon, or are past due and shows the number of tasks at each stage of completion. The "Today" row shows tasks due today (Priority Date is today), the "Urgent" row shows tasks past their Priority Date, and the "Backlog" row shows tasks past their Task Due Date.

5. Case Search: Manual Assignment of Tasks

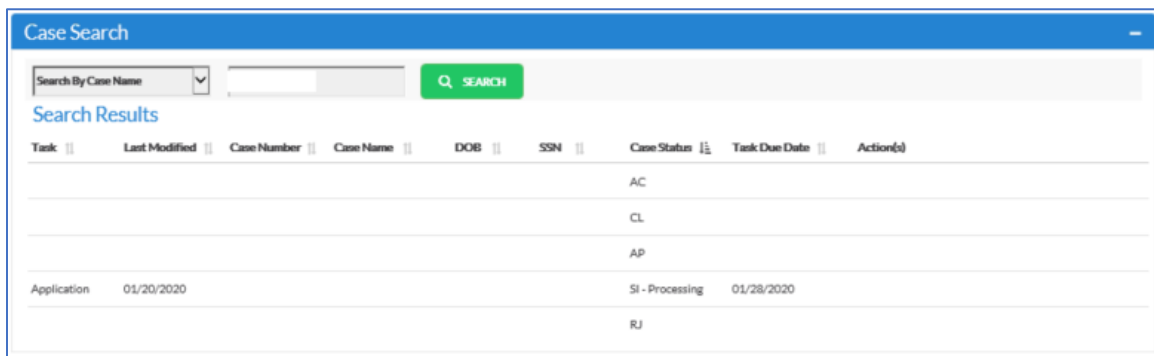
To manually assign a task, the Manager must first search for the respective case. The Manager can execute a search based on the following criteria:

- **Case Number**
- **SSN**
- **Case Name**
- **CIN**

- **Access Human Resources Administration (AHRA) Confirmation #**
- **Interactive Voice Response System (IVRS) #**



Based on the criteria selected from the dropdown, the Manager will be required to enter the corresponding information. Upon selecting the **Search** button, the system will display the search results consisting of Task, Last Modified, Case Number, Case Name, DOB, Social Security Number (SSN), Case Status, Task Due Date and Action(s).

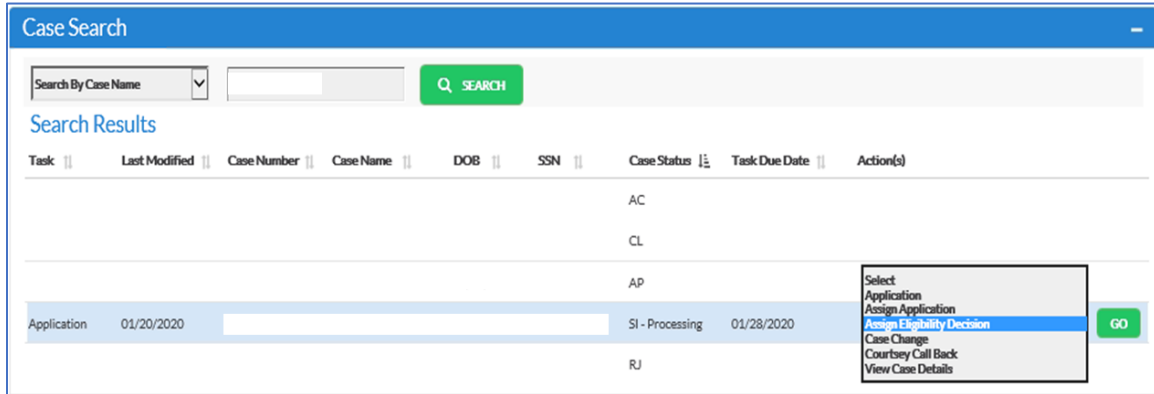


- Selecting the desired row will highlight that row. Once the desired row is selected, the Manager can select from available options from the Action(s) dropdown and select **Go** to execute. The options available within the Action(s) dropdown are dependent on the **Case Status** of the Search result. The search process can result in the following three outcomes:
 - (1) **Open Task**
 - Cases with **open task** will have information in the **Task** and **Last Modified** columns of **Search Results** section
 - If the system finds a case with **open task**, it will display this case first in the **Search Results** section
 - If the system finds multiple cases with **open tasks**, it will display these cases first and sorted by earliest date in the **Task Due Date** column
 - (2) **Latest Task**
 - If the system does not return any cases with **open tasks** in the **Search Results** section, the system will initially sort the found cases by **Case Number** column in **Ascending** order.
 - Cases without open task are those where there is no information in the **Task** and **Last Modified** columns of the **Search Results** section
 - (3) **No Task**

- The system displays message “No Case found, please refine your search criteria.”

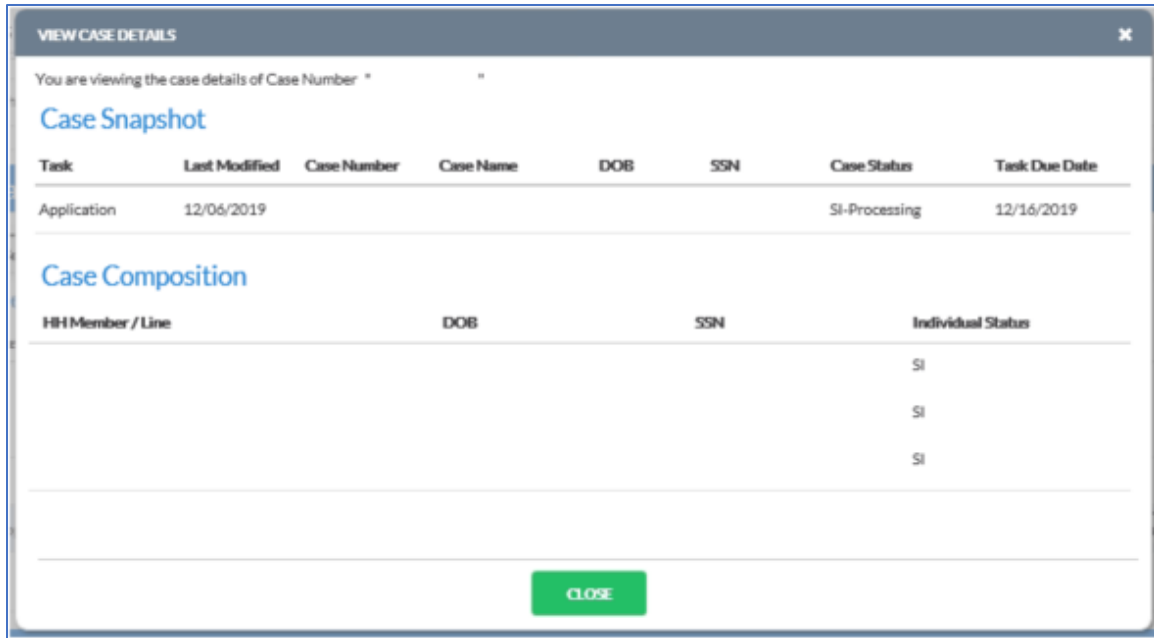
Search Results Actions(s) Combo Box will contain a list of available actions for the Manager. These actions will be table-driven. These tables allow control at the following levels:

- Role of Manager (there are many titles within 1 role) – Streamlined Paperless Office System (SPOS) roles will be leveraged to maintain compatibility with POS queue during the project.
- Center designation of Manager.
- Current Welfare Management Systems (WMS) case status of the selected case in search results.
- List of activities available for the case, based on the case status and open task.



- Selecting the **View Case Details** option from Action(s) and **Go** will result in a modal window with the case profile, consisting of the **Case Snapshot** and **Case Composition**. The columns for the Case Snapshot section consist of **Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status,** and **Task Due Date**. The columns for the Case Composition section consist of **HH Member/Line, DOB, SSN,** and **Individual Status**.

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The Manager can manually assign tasks by searching for the case and then selecting the **Assign** option from the Actions dropdown. Clicking on the **Go** button results in a modal window displaying the **Case Snapshot**, **Case Composition**, along with the **Staff** section as seen below.

The columns for the Case Snapshot section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, and **Task Due Date**.

The columns for the Case Composition section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**. Within the Staff section, the Manager can search for the Staff based on **Staff Name** or **Role** and then select the intended staff within the grid. If Name is selected, then the Manager is required to enter the name as seen below. If Role is selected, the Manager is required to select an option from the Role dropdown consisting of **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, or **Clerical Associate**. Selecting the **Search** button will display the search results in the grid. The sortable columns displayed in the Staff section include **Name**, **Role**, and **Status**.

Attachment D Manager Role
 ANGIE Release 1 Notes

MANUAL ASSIGNMENT

Case Snapshot

Task	Last Modified	Case Number	Case Name	DOB	SSN	Case Status	Task Due Date
Application	01/20/2020					SI - Processing	01/28/2020

Case Composition

HH Member / Line	DOB	SSN	Individual Status
			SI
			SI
			SI

Staff

Select Search By Item
Search By Staff Name
Select Search By Role

 Q SEARCH

Name	Role	Status
	SNAP Eligibility Specialist	Active
	SNAP Eligibility Specialist	Active
	SNAP Eligibility Specialist	Active

CLOSE
✕ DISCARD CHANGES
✓ ASSIGN

Once a row is selected for the intended staff, it will highlight, and selecting the **Assign** button will assign the task to that staff.

MANUAL ASSIGNMENT

Case Snapshot

Task	Last Modified	Case Number	Case Name	DOB	SSN	Case Status	Task Due Date
Application	01/20/2020					SI - Processing	01/28/2020

Case Composition

HH Member / Line	DOB	SSN	Individual Status
			SI
			SI
			SI

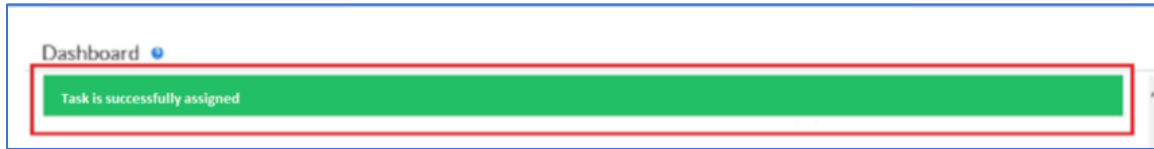
Staff

Search By Staff Name v
 ✕
Q SEARCH

Name	Role	Status
	SNAP Eligibility Specialist	Active
	SNAP Eligibility Specialist	Active
	SNAP Eligibility Specialist	Active

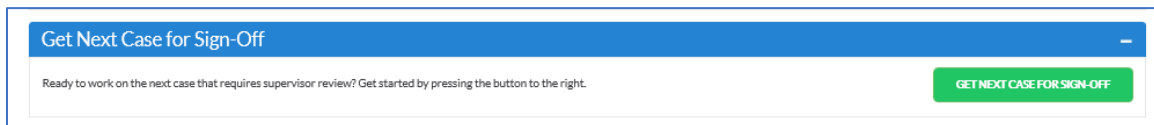
CLOSE
✕ DISCARD CHANGES
✓ ASSIGN

The Manager will see a green banner to inform that the task has been successfully assigned.



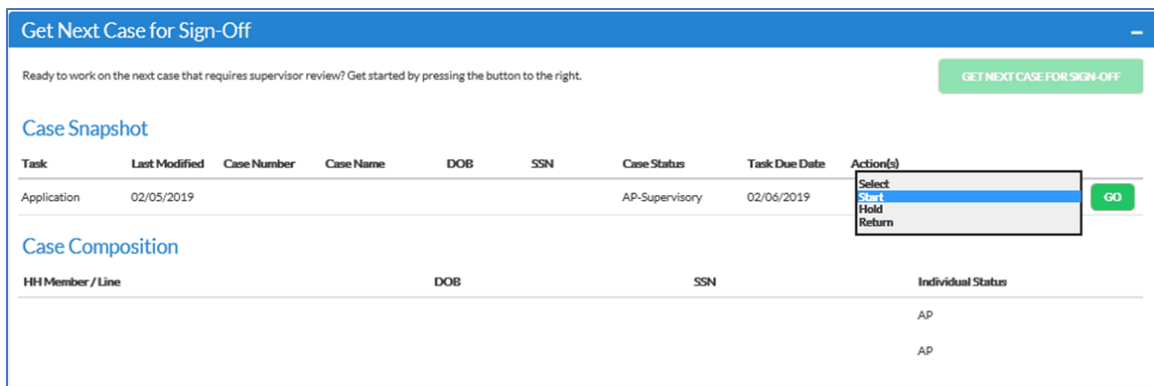
6. Get Next Case for Sign-off: Next Approval Task for Manager

- The Manager will get the next task to approve by selecting the **Get Next Case for Sign-off** button located within the dashboard. The approval tasks that are distributed to the Manager will be based on the priority logic.



- Once the button is clicked, the Manager will see a case profile consisting of **Case Snapshot** and **Case Composition**. The columns for the Case Snapshot section consist of **Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status, Task Due Date, and Action(s)**. The columns for the Case Composition section consist of **HH Member/line, DOB, SSN, and Individual Status**.

The Manager will be able to start the **Approval** task by selecting the **Start** option within the Action(s) dropdown, and then selecting the **GO** button. The ANGIE system will then launch SPOS for the Manager to approve the respective task.



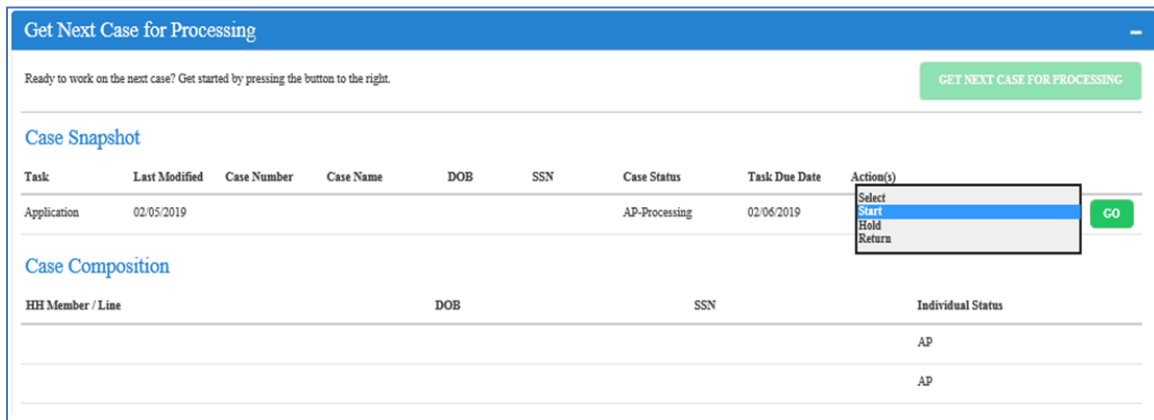
7. Get Next Case for Processing for Manager

The Manager can step down to the role of the Eligibility Specialist (ES) and function as an Eligibility Specialist. The tasks that are distributed to Managers within this widget, are non-approval tasks. This function will allow the Manager to help the Eligibility Specialists perform their tasks when additional person power is needed.

- Selecting the **Get Next Case for Processing** button located within the dashboard will distribute a non-approval task based on the priority logic.



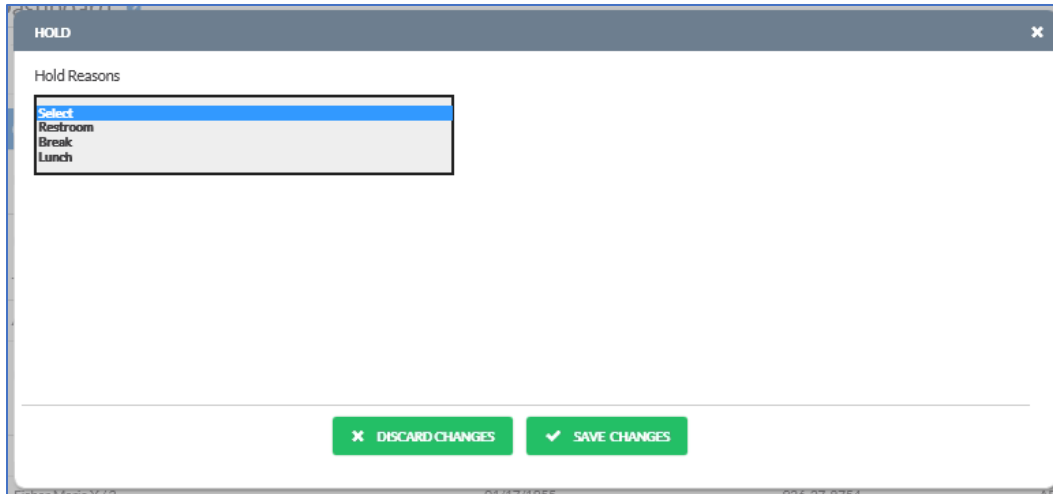
- Once the button is clicked, the Manager will see a case profile consisting of **Case Snapshot** and **Case Composition** as seen below. The columns for the Case Snapshot section consist of **Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status, Task Due Date,** and **Action(s)**. The columns for the Case Composition section consist of **HH Member/Line, DOB, SSN,** and **Individual Status**. The Manager will be able to start the task by selecting the **Start** option within the Action(s) dropdown, and then selecting the **GO** button. The ANGIE system will then launch the Streamlined POS (SPOS) application for the Manager to work on the respective task.



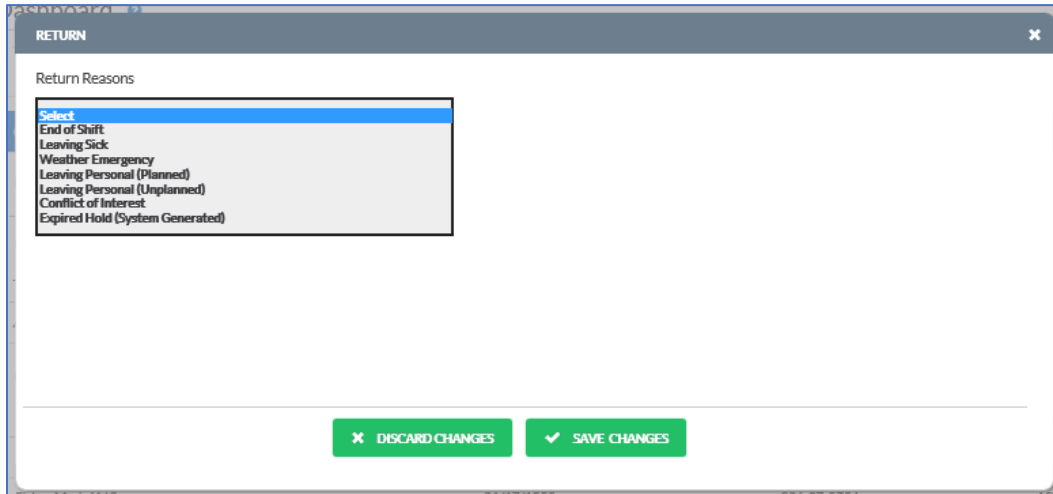
8. Hold or Return Task

- The Manager can execute a **Hold** or **Return** on a task and is applicable to both the **Get Next Case for Processing** and **Get Next Case for Sign-Off** widgets. The Manager can execute a hold on a task by selecting the **Hold** option from the Action(s) dropdown and clicking on the **Go** button. The Manager will see a modal window and is required to select from the available Hold Reasons (**Restroom, Break, Lunch**). Once the Manager selects the applicable hold reason and then selects **Save Changes**, the hold will be applied on the respective task for a set time (2 hours), for that Manager. Note that the Manager cannot work on another “prioritized task” until the hold task is worked. If the Manager returns within the set time, the Manager will be provided with the same task upon selecting the **Get Next Case for Processing** button. If the hold time lapses, then the task will be placed back in the general pool and another Manager may have access to that task.

Attachment D Manager Role ANGIE Release 1 Notes



- The Manager can return a task by selecting the **Return** option from the Action(s) dropdown and clicking on the **Go** button. The Manager will see a modal window and must select from the available Return Reasons (**End of Shift, Leaving Sick, Weather Emergency, Leaving Personal (Planned), Leaving Personal (Unplanned), Conflict of Interest, Expired Hold (System Generated)**). After selecting the applicable return reason and clicking on the **Save Changes** button, the task will be returned to the general pool and another Manager can get the task.



9. Team Performance Page for Manager

The Manager can access their **Team Performance** page from the left navigation pane. This page will provide metrics to gauge the team's performance and allow the Manager to drill-down from the Citywide view (default) to Regional Manager view, Manager view, Supervisor view, and finally to the Eligibility Specialist view. The Manager is required to select the timeframe for the report to generate and can choose from **Last 7 Days, Last 30 Days, or Last 90 Days**.

- Once the desired timeframe is selected, selecting the **Retrieve** button will display the corresponding results.

The screenshot displays the 'Team Performance' dashboard. At the top, there is a 'Time Period' dropdown menu with options for 'Last 3 Days', 'Last 30 Days', and 'Last 90 Days'. A green 'RETRIEVE' button is positioned to the right of the dropdown. Below the dropdown, the 'Citywide Team Summary' section is visible, which includes three tables: 'Team Total', 'Team Average', and 'HRA Average'. The 'Team Average' table has a blue box around the 'Error Rate' value of 21%. Below this, the 'Citywide Staff Detail' section is shown, featuring a table with columns for 'Regional Manager Name', 'Tasks', 'Errors', and 'Error Rate'. The table contains three rows of data, with the first row having a green star icon and the second row having a yellow warning icon.

Regional Manager Name	Tasks	Errors	Error Rate
	29816	3251	10%
★	23986	1387	5%
⚠	25985	7587	29%

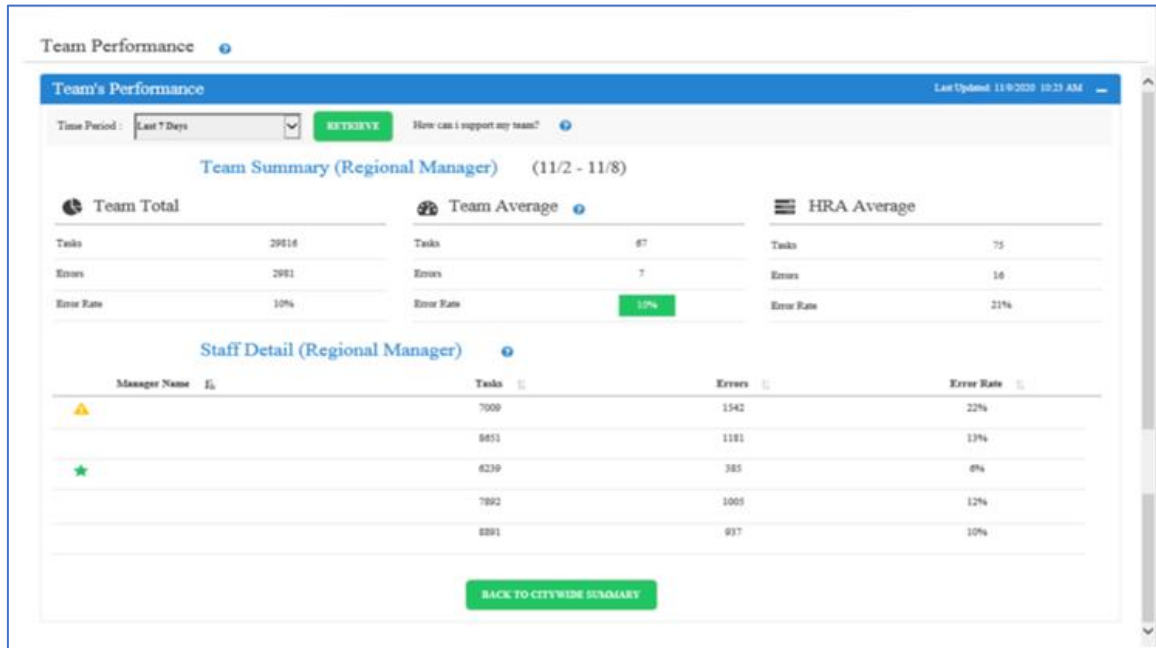
The Manager will start with the **Citywide View** as the default view on this page as seen above. This page consists of **Citywide Team Summary** and **Citywide Staff Detail** sections.

The **Citywide Team Summary** section of the page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, and **Error Rate** as a percentage. The Error Rate for the Team Average table will be displayed within green, yellow, or blue boxes to indicate if the team's WMS Error Rate is above, below, or same as the HRA Average, respectively.

The **Citywide Staff Detail** section contains columns for **Regional Manager Name**, **Tasks**, **Errors**, and **Error Rate**. To the left of the Regional Manager Name column shows icons to represent the following:

- **Yellow Warning icon** shows performance in the 15th percentile or below.
- **Green Star icon** shows performance in the 85th percentile or above.
- Selecting the name within the **Regional Manager Name** column in the Citywide view will give access to the selected Regional Manager view as seen below. Consequently, depending on the name selected for drill-down, the Team Summary values on top changes to show the selected Regional Manager's Team Summary. Also, the **Staff Detail** section on the bottom of the page changes to show the selected Regional Manager's Staff Detail as seen in below screen.

Screen showing Regional Manager View for Team Performance:



The Regional Manager view will contain the name of the selected Regional Manager in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the Team performance page of the selected Regional Manager.

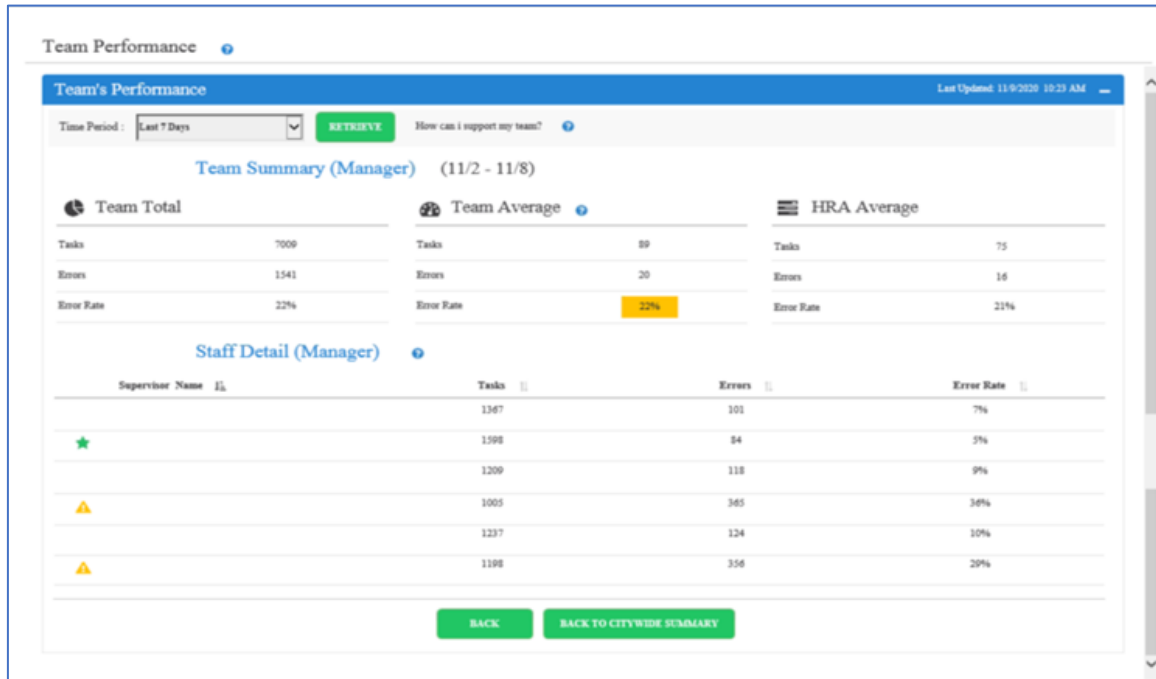
The **Team Summary** section of this page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, and **Error Rate** as a percentage. The Error Rate for the Team Average table will be displayed within green, yellow, or blue boxes to indicate if the selected Regional Manager's team's WMS Error Rate is above, below, or same as the HRA Average, respectively.

The **Staff Detail** section contains columns for **Manager Name**, **Tasks**, **Errors**, and **Error Rate**. To the left of the Manager Name column shows icons to represent the following:

- **Yellow Warning icon** shows performance in the 15th percentile or below.
- **Green Star icon** shows performance in the 85th percentile or above.

From the Regional Manager view (above screen), the Manager can access the **Manager view** by selecting the name within the **Manager Name** column. Consequently, depending on the name selected for drill-down, the Team Summary values on top of the page changes to show the selected Manager's Team Summary as seen below. Also, the **Staff Details** section on the bottom of the page changes to show the selected Manager's Staff Details as seen in the below screen. Selecting **Back to Citywide Summary** will navigate the Manager to the default Citywide view.

Screen showing Manager View for Team Performance:



The Manager view will contain the name of the selected Manager in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the Team performance page of the selected Manager.

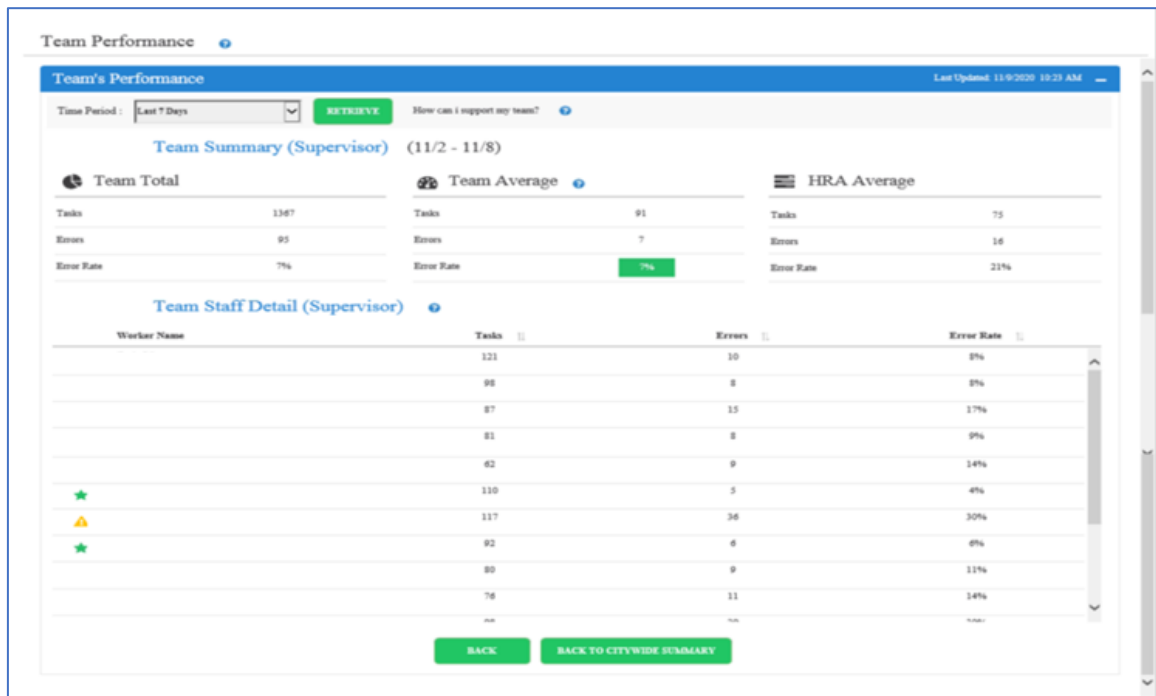
The **Team Summary** section of this page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, and **Error Rate** as a percentage. The **Error Rate** for the **Team Average** table will be displayed within green, yellow, or blue boxes to indicate if the selected Manager's team's WMS Error Rate is above, below, or same as the HRA Average respectively.

The **Staff Detail** section contains columns for **Supervisor Name**, **Tasks**, **Errors**, and **Error Rate**. To the left of the Supervisor Name column shows icons to represent the following:

- **Yellow Warning icon** shows performance in the 15th percentile or below.
- **Green Star icon** shows performance in the 85th percentile or above.

From the Manager view (above screen), the Manager can access the **Supervisor view** by selecting the name within the **Supervisor Name** column. Consequently, depending on the name selected for drill-down, the Team Summary values on top of the page changes to show the selected Supervisor's Team Summary as seen below. Also, the Staff Details section on the bottom of the page changes to show the selected Supervisor's Staff Details as seen below. Selecting **Back** will navigate the

Manager to the previous page (Regional Manager View). Selecting **Back to Citywide Summary** will Navigate the Manager to the default Citywide View. Screen showing Supervisor View for Team Performance:



The Supervisor view will contain the name of the selected Supervisor in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the Team performance page of the selected Supervisor.

The **Team Summary** section of this page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, and **Error Rate** as a percentage. The Error Rate for the Team Average table will be displayed within green, yellow, or blue boxes to indicate if the selected Supervisor's team WMS Error Rate is above, below, or same as the HRA Average respectively.

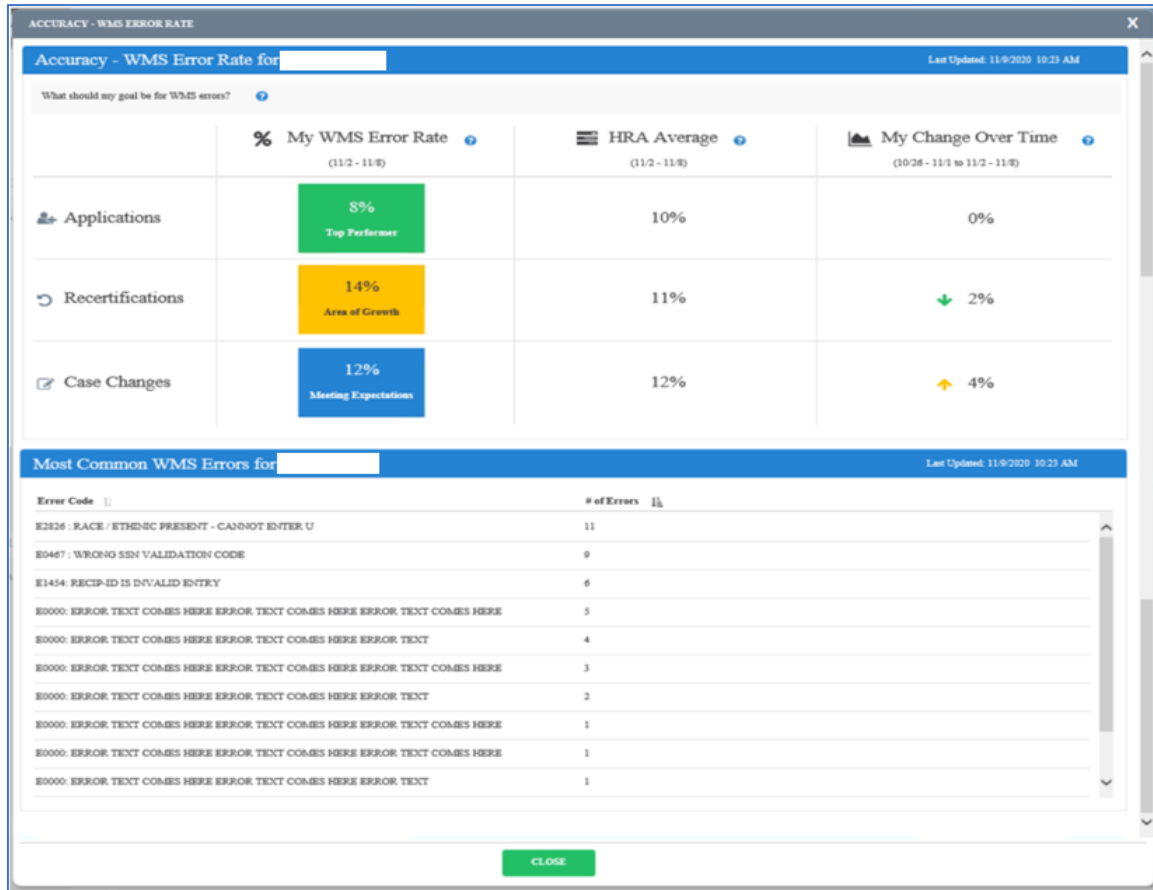
The **Staff Detail** section contains columns for **Worker Name**, **Tasks**, **Errors**, and **Error Rate**. To the left of the Worker Name column shows icons to represent the following:

- **Yellow Warning icon** shows performance in the 15th percentile or below.
- **Green Star icon** shows performance in the 85th percentile or above.

From the Supervisor view (above screen), the Manager can access the **Eligibility Specialist view** by selecting the **Errors** and **Error Rate** values for the respective Eligibility Specialist. Consequently, the Manager will be able to view the Performance page of the selected Eligibility Specialist as seen below.

- Selecting **Back** will Navigate the Manager to the previous page (Manager View).
- Selecting **Back to Citywide Summary** will Navigate the Manager to the default Citywide View.

Screen showing Eligibility Specialist's Performance page:



The Eligibility Specialist view will contain the name of the selected Eligibility Specialist on the widgets **Accuracy – WMS Error Rate** and **Most Common WMS Errors**.

The **Accuracy - WMS Error Rate** widget provides Error Rates on the **Applications**, **Recertifications**, and **Case Changes** worked on by the Eligibility Specialist for the set timeframe. The table provides Error Rates on the **Applications**, **Recertifications**, and **Case Changes** worked on by the Eligibility Specialist for the set timeframe. It provides information on the selected Eligibility Specialist's performance in terms of their own Error Rate (displayed within **My WMS Error Rate**), HRA Average Error Rate (displayed within **HRA Average**), and keeps track of the Eligibility Specialist's current Error Rate over the previous period (displayed within **My Change Over Time**).

My WMS Error Rate column:

- At the header level, the actual dates for the timeframe selected is displayed below the **My WMS Error Rate** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- WMS Error Rate **Calculation**: Numerator = number of errors made on that type of task. Denominator = total number of that type of task submitted to WMS.
 - Both the numerator and the dominator must occur within the timeframe in order to be part of the WMS Error Rate Calculation.
 - The WMS Error Rate is displayed as a percentage.
 - If the Eligibility Specialist did not perform any tasks (0 tasks) for the selected time period (e.g. The Eligibility Specialist did not do any Case Changes in the Last 7 Days (selected period), and only worked on Applications and Recertifications), **N/A** will be displayed across the Case Changes row. In this example, Applications and Recertifications will have Error Rates across the rows.
- Depending on the WMS Error rate comparison to the HRA Average, the following depictions are used:
 - If the Eligibility Specialist's Error Rate for the selected period is less than the HRA Average, the header will read **Top Performer** colored in a green color block.
 - If the Eligibility Specialist's Error Rate for the selected period is the same as the HRA Average the header will read **Meeting Expectations** colored in blue color block.
 - If the Eligibility Specialist's Error Rate for the selected period is greater than the HRA Average, the header will read **Area for Growth** colored in yellow color block.

HRA Average column:

- At the header level, the actual dates for the selected time period are displayed below the **HRA Average** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- Shows the average WMS Error Rate for all other Eligibility Specialists for the selected time across each Task Type (Applications, Recertifications, and Case Changes)

My Change over Time column:

- At the header level, the actual dates for the previous time period are displayed below the **My Change Over Time** column in the following format: [previous timeframe to current timeframe in the following date format: mm/dd – mm/dd to mm/dd - mm/dd]
- If this period's Error Rate is below that of the last period, there will be a green arrow pointing downwards, followed by the change in percent.

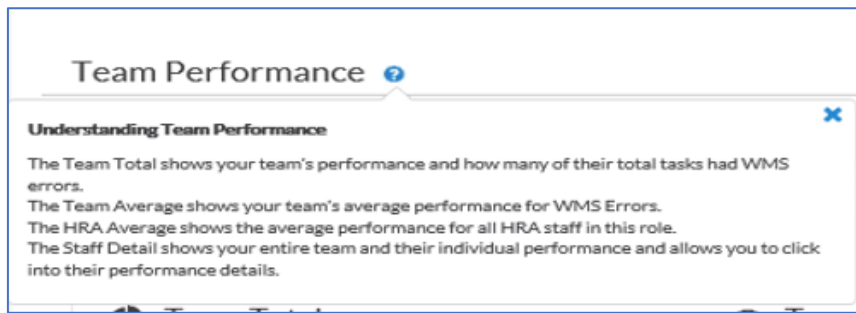
Attachment D Manager Role
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- If this week's Error Rate is the same from the last week, it will only display "0%".
- If this week's Error Rate is above that from the last week, there will be a yellow arrow pointing upwards, followed by the change in percent.

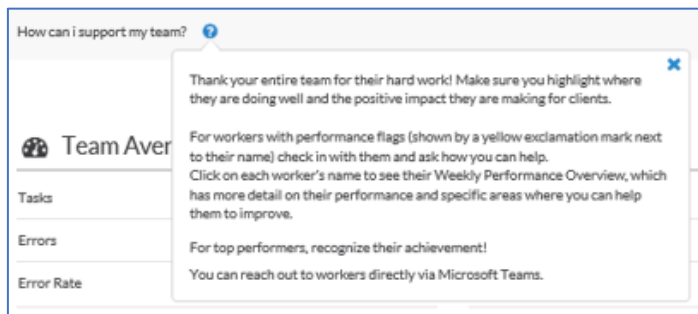
My Most Common WMS Errors widget has a summary table of the selected Eligibility Specialist's most common errors based on the selected timeframe. The table consists of two columns. The **Error Code** column shows the name of the WMS Error(s). The **# of Errors** column shows the count of the number of corresponding WMS Errors. Both columns are sortable.

Selecting **Close** will return Manager to the Supervisor view.

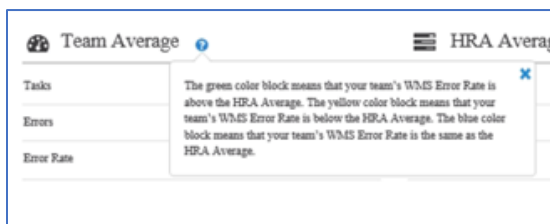
Team Performance - Help Text:



How can I support my team? - Help Text:

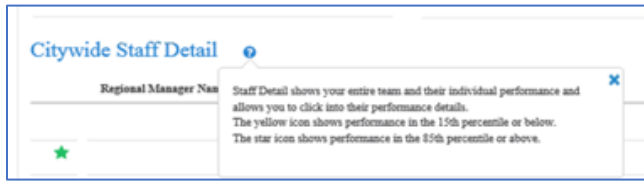


Team Average - Help Text:

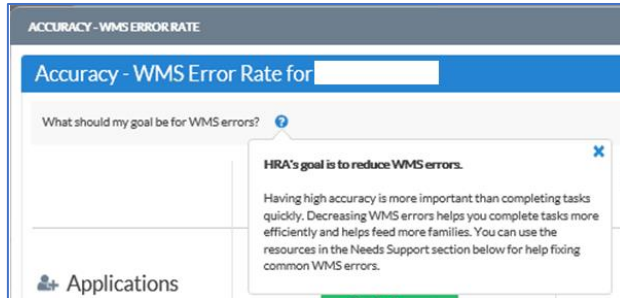


Attachment D Manager Role
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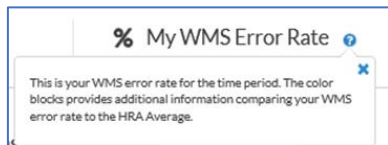
Staff Detail - Help Text:



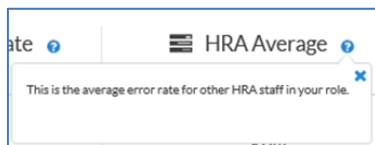
What should my goal be for WMS errors? - Help Text:



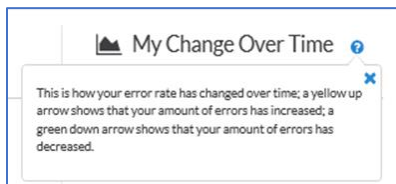
My WMS Error Rate – Help Text:



HRA Average – Help Text:



My Change Over Time – Help Text:



10. Team's Daily Activity for Manager

The **Team's Daily Activity** page can be accessed by the Manager from the left navigation pane. This page starts with the **Citywide view** for the Manager and consists of **Activity Summary – Citywide** and **Activity Detail – Citywide** widgets as seen below.

The screenshot shows the 'Team's Daily Activity' dashboard. The top widget, 'Activity Summary - Citywide', is updated as of 10/20/2020 10:23 AM. It contains three sub-tables: 'Staff Overview', 'Tasks Status', and 'Tasks Completed'. The 'Staff Overview' table lists: Total Staff (369), Logged In (225), Unavailable (49), End of Shift (47), and Not Logged in Today (48). The 'Tasks Status' table lists: Initiated (8784), In Progress (231), Incomplete (1531), and Complete (7022). The 'Tasks Completed' table lists: Interviews (1202), Applications (1462), Recertifications (1419), Case Changes (1169), and Document Reviews (1770). A 'View Details' link is present next to the 'Staff Overview' title.

The bottom widget, 'Activity Detail - Citywide', is also updated as of 10/20/2020 10:23 AM. It is a table with the following data:

Regional Manager Name	Tasks In Progress	Tasks Incomplete	Tasks Complete	Interview	Application	Recertification	Case Change	Document Reviews
	75	627	2682	401	516	555	585	495
	89	503	2302	429	447	519	379	528
	67	401	2168	372	499	345	205	747
Total	231	1531	7022	1202	1462	1419	1169	1770

The **Activity Summary – Citywide** widget consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**. The **Staff Overview** table provides an inventory of the Total Staff, Logged In, Unavailable, End of Shift, and Not Logged in Today. The **Tasks Status** table provides information on the number of tasks that are Initiated, In Progress, Incomplete, and Complete. The **Tasks Completed** table provide the number of tasks that are completed for Interviews, Applications, Recertifications, Case Change, and Document Reviews.

A **View Details** link is provided within the **Staff Overview** table that will provide details of staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**. Upon selection of the link a modal window consisting of columns for **Worker Name**, **Status**, **Unavailable Reason**, and **Date & Time** as seen below will display. Selecting **Close** will return the Manager to the default Citywide view of the Team's Daily Activity page.

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Worker Name	Status	Unavailable Reason	Date & Time
	Logged In	NA	10/20/2020 09:10 AM
	Logged In	NA	10/20/2020 08:20 AM
	Logged In	NA	10/20/2020 09:02 AM
	Unavailable	Lunch	10/20/2020 12:02 PM
	Unavailable	Training	10/20/2020 10:00 AM
	Unavailable	Special Project	10/20/2020 11:31 AM
	Unavailable	System Issues	10/20/2020 10:01 AM
	Unavailable	Gorup Meeting	10/20/2020 11:00 AM
	Unavailable	Supervisory Meeting	10/20/2020 10:50 AM
	Unavailable	Other - reason comes here 30 characters limit	10/20/2020 10:20 AM
	End of Shift	NA	10/20/2020 2:00 PM
	End of Shift	N/A	10/20/2020 2:00 PM

[CLOSE](#)

The default view of the **Activity Detail – Citywide** widget shows columns for Regional Manager Name, Tasks in Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, Document and Reviews. The **Regional Manager Name** column are links and upon selection, the Manager can view the selected Regional Manager’s Team’s Daily Activity page as seen below.

Team's Daily Activity

Activity Summary for [Redacted] Team (Regional Manager) Last Updated: 10/20/2020 10:23 AM

Staff Overview		Tasks Status		Tasks Completed	
Total Staff	591	Initiated	3430	Interviews	482
Logged In	463	In Progress	470	Applications	516
Unavailable	56	Incomplete	627	Recertifications	555
End of Shift	37	Complete	2533	Case Changes	585
Not Logged in Today	35			Document Reviews	495

Activity Detail for [Redacted] Team (Regional Manager) Last Updated: 10/20/2020 10:23 AM

Manager Name	Tasks In Progress	Tasks Incomplete	Tasks Complete	Interview	Application	Recertification	Case Change	Document Reviews
[Redacted]	98	166	448	71	109	79	82	107
[Redacted]	95	132	530	79	89	114	123	125
[Redacted]	88	104	538	113	101	123	103	98
[Redacted]	110	137	546	87	123	115	134	87
[Redacted]	79	89	471	132	94	124	143	78
Total	470	627	2533	482	516	555	585	495

[BACK TO CITYWIDE SUMMARY](#)

In the Regional Manager view (above screen), the selected Regional Manager’s name is displayed on the **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected Regional Manager’s Team’s Daily Activity.

The **Activity Summary** widget for the selected Regional Manager consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**. The **Staff Overview** table provides an inventory of the Total Staff, Logged In, Unavailable, End of Shift, and Not Logged in Today. The **Tasks Status** table provides information on the number of tasks that are Initiated, In Progress, Incomplete, and Complete. The **Tasks Completed** table provide the number of tasks that are completed for Interviews, Applications, Recertifications, Case Changes, and Document Reviews.

A **View Details** link is provided within the **Staff Overview** table that will provide details of the Regional Manager’s staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**. Upon selection of the link a modal window consisting of columns for **Worker Name**, **Status**, **Unavailable Reason**, and **Date & Time** will display.

The **Activity Detail** widget for the selected Regional Manager shows columns for Manager Name, Tasks in Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, and Document Reviews. The **Manager Name** column contains links and upon selection, the Manager can drilldown to the selected Manager’s Team’s Daily Activity page as seen below. Selecting **Back to Citywide Summary** in above screen navigates the Manager to the default Citywide View (above screen).

The screenshot displays the 'Team's Daily Activity' dashboard. At the top, it says 'Team's Daily Activity' with a refresh icon. Below this is the 'Activity Summary for [Redacted] Team (Manager)' section, which includes three sub-tables: 'Staff Overview', 'Tasks Status', and 'Tasks Completed'. The 'Staff Overview' table lists: Total Staff (118), Logged In (63), Unavailable (36), End of Shift (7), and Not Logged in Today (12). The 'Tasks Status' table lists: Initiated (697), In Progress (71), Incomplete (165), and Complete (461). The 'Tasks Completed' table lists: Interviews (84), Applications (109), Recertifications (79), Case Changes (82), and Document Reviews (107). Below the summary is the 'Activity Detail for [Redacted] Team (Manager)' section, which is a table with columns: Supervisor Name, Tasks In Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, and Document Reviews. The table contains 6 rows of data and a 'Total' row. At the bottom of the dashboard are two buttons: 'BACK' and 'BACK TO CITYWIDE SUMMARY'.

Supervisor Name	Tasks In Progress	Tasks Incomplete	Tasks Complete	Interview	Application	Recertification	Case Change	Document Reviews
[Redacted]	11	26	92	16	26	11	18	21
[Redacted]	16	31	94	19	23	13	16	23
[Redacted]	10	24	78	15	19	11	14	19
[Redacted]	8	27	73	14	17	9	17	16
[Redacted]	11	31	62	9	14	19	9	11
[Redacted]	16	26	62	11	10	16	8	17
Total	71	166	461	84	109	79	82	107

In the Manager view (above screen), the selected Manager's name is displayed on the **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected Manager's Team's Daily Activity.

The **Activity Summary** widget for the selected Manager consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**. The **Staff Overview** table provides an inventory of the Total Staff, Logged In, Unavailable, End of Shift, and Not Logged in Today. The **Tasks Status** table provides information on the number of tasks that are Initiated, In Progress, Incomplete, and Complete. The **Tasks Completed** table provides the number of tasks that are completed for Interviews, Applications, Recertifications, Case Changes, and Document Reviews.

A **View Details** link is provided within the **Staff Overview** table that will provide details of the Manager's staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**. Upon selection of the link a modal window consisting of columns for **Worker Name**, **Status**, **Unavailable Reason**, and **Date & Time** will display.

The **Activity Detail** widget for the selected Manager shows columns for Supervisor Name, Tasks in Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, and Document Reviews. The **Supervisor Name** column contains links and upon selection, the Manager can drilldown to the selected Supervisor's Team's Daily Activity page as seen below. Selecting **Back** in above screen navigates the Manager to the previous page (Regional Manager View). Selecting **Back to Citywide Summary** in above navigates the Manager to the default Citywide View.

The screenshot displays the 'Team's Daily Activity' interface. At the top, it shows 'Team's Daily Activity' with a refresh icon and a 'Last Updated: 10/20/2020 10:23 AM' timestamp. Below this is the 'Activity Summary for [Redacted] Team (Supervisor)' section, which includes three sub-tables: 'Staff Overview', 'Tasks Status', and 'Tasks Completed'. The 'Staff Overview' table lists metrics like Total Staff (15), Logged In (3), Unavailable (7), End of Shift (3), and Not Logged in Today (2). The 'Tasks Status' table lists metrics like Initiated (121), In Progress (5), Incomplete (18), and Complete (98). The 'Tasks Completed' table lists metrics like Interviews (19), Applications (15), Recertifications (22), Case Changes (26), and Document Reviews (16). Below the summary is the 'Activity Detail for [Redacted] Team (Supervisor)' section, which features a table with columns for Worker Name, Tasks In Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, and Document Reviews. The table contains 10 rows of data. At the bottom of the detail section are two buttons: 'BACK' and 'BACK TO CITYWIDE SUMMARY'.

In the Supervisor view (above screen), the selected Supervisor's name is displayed on the **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected Supervisor's Team's Daily Activity.

The **Activity Summary** widget for the selected Supervisor consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**. The **Staff Overview** table provides an inventory of the Total Staff, Logged In, Unavailable, End of Shift, and Not Logged in Today. The **Tasks Status** table provides information on the number of tasks that are Initiated, In Progress, Incomplete, and Complete. The **Tasks Completed** table provide the number of tasks that are completed for Interviews, Applications, Recertifications, Case Changes, and Document Reviews.

A **View Details** link is provided within the Staff Overview table that will provide details of the selected Supervisor's staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**. Upon selection of the link a modal window consisting of columns for **Worker Name**, **Status**, **Unavailable Reason**, and **Date & Time** will display.

The **Activity Detail** widget for the selected Supervisor shows columns for Worker Name, Tasks in Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, and Document Reviews. The **Worker Name** column contains links and upon selection, the Manager can drilldown to the selected Eligibility Specialist's Daily Activity sheet as seen below. Selecting **Back** in the above screen navigates the Manager to the previous page (Manager View).

Selecting **Back to Citywide Summary** in the above screen navigates Manager to the default Citywide View.

Status	Start Time	Case Number	Case Name	Start Event	WMS Status	End Event	Decision	HH Size	Duration (Mins)
✓	09:06 AM			Application - Start Interview	AP	Complete Interview - Deferred for Verification	AC-A30	6	40
!	09:48 AM			Application - ESNAP Processing	AP	Suspend Processing	AC-A30	6	22
✓	10:18 AM			Change Case - Change Case Ready	AC	Deferred/Pending Change Verification	AC-832	4	21
!	10:42 AM			Application - Start Interview	AP	Suspend Interview	AP-	3	15
✓	11:04 AM			Recertification - Mandated Verification Received - Full	AC	Complete Processing	AC-A30	8	30
🕒	11:35 AM			Document Review - Start Document Review	AC	NA	AC-A30	5	-

The name of the selected Eligibility Specialist is seen on the **Daily Activity Sheet** widget. The **Daily Activity Sheet** widget keeps track of and displays a summary of the Eligibility Specialist's daily activity as a snapshot of the work completed for the current day. This allows the Eligibility Specialist to keep track of their work and in addition allows the Manager to review the respective Eligibility Specialist's daily progress. The Daily Activity Sheet provides information on the Status, Start Time, Case Number, Case Name, Start Event, WMS Status, End Event, Decision, HH Size, and Duration (Mins):

- **Status:** The icons within this column provide context at a glance for tasks that are **Completed** (green check), **Suspended** (yellow exclamation) and **In-Progress** (blue hourglass).
 - For an Interview, the Status is Incomplete if the end event is **Suspend Interview**. Otherwise, the interview is complete.
 - For **processing actions**, the status is incomplete if the end event is **Suspend Processing** and the task status is not **Pending**. Otherwise, it is complete.
 - When an event is currently in progress:
 - Duration column for that row displays a dash (minus sign).
 - End Event column for that row displays "**N/A**".
- **Start Time:**
 - Displays the time that the event was started in the format: **hh:mm AM/PM**
 - The default view will be based on the ascending order of Start Time.
- **Case Number:** This is the Case Number associated with the case.
- **Case Name:** This is the WMS Case Name.
- **Start Event:** This is a combination of Task Type & the following elements:
 - For **Application** and **Recertification** Task:

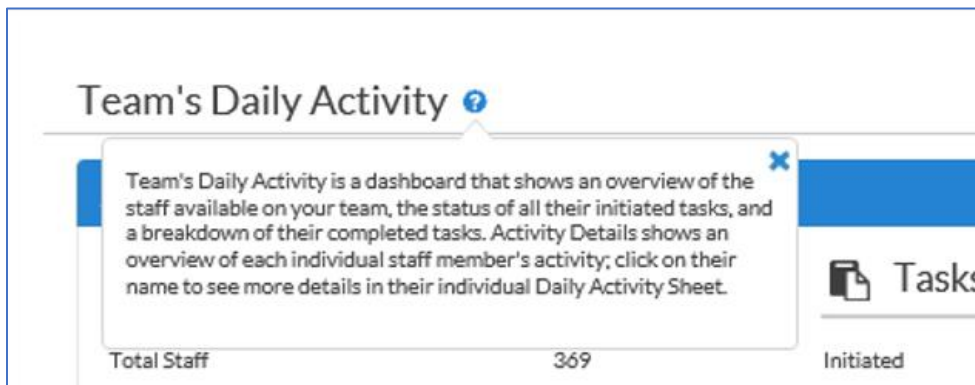
- Interview Started - If an Interview was either distributed from Get Next or started from Case Search, the element must display “Interview Started”.
- Ready to Assign Event - For any case that was distributed and started from the Get Next button, the Ready to Assign Event must be displayed. For example, “Mandated Verification Received – Full” event.
- SPOS Activity - For any Events that were started from Case Search, the SPOS Activity must be used. For example, “Application Modification”, “Make Case Comment”, etc.
- For **Change Case**: The start event is typically: “Change Case Ready” (if started from Get Next) or “Start Processing” (if started from Case search).
- For **Document Review**, the start event is always: “Start Document Review”.
- **WMS Status**: The existing WMS case status (starting state) - AP, RJ, SI, AC, CL.
- **End Event**: The final event that is triggered by the Eligibility Specialist's action. This data comes from the **Event Log**.
 - For any start events in the status of **Interview** in the **Event Log**, the End Event is always either: **Suspend Interview** or **Complete Interview**.
 - For **Change Case** events, the system checks whether a Deferral was made in the **Pending** status events; if yes, then the end event is “Deferred/Pending Change Verification”. Otherwise, the last event with a status of **Processing** is used.
 - For other **Processing-related** start events other than **Change Case**, the End Event is recorded when the Processors finishes their action in SPOS (last event with a status of **Processing** for the Eligibility Specialist).
 - The End Event can be **Complete Interview**, **Suspend Processing** or **Complete Processing**. The End events will be further distinguished to have the exact outcome, with the possible values displayed below. The event log will also get updated accordingly.
 1. Complete Interview - No deferral
Complete Interview - Deferred for verification
Complete Interview - Deferred for IVS/RFI/SDX
Complete Interview - Deferred for verification and IVS/RFI/SDX
NOTE: For the Interview, the End Event will be the latest event in status of Interview
 2. Suspend Processing - Deferred for change verification
NOTE: For processing actions, the end event will be the latest event in status of Processing
 - For cases that are “In Progress”, the End Event column will reflect N/A for the respective row.
- **Decision**: This is the Status and Reason Code selected in SPOS (End State), as it represents the action that the Eligibility Specialist took on the case to end their processing and reach a case outcome.

- The decoded value is needed. For example: **AC-A30** (Same Approval each month), **RJ-V21** (Failure to Provide Verification), **SI-Q22** (Expedited Pending Verification).
- The description of the code will not be included.
- If there is no SPOS decision code, then the reason code will be blank. For example, “Application Pending (AP)- “, “Active (AC)-“
- **HH Size** Number of people in AP, Single Issue (SI) or AC status in associated with the WMS case.
- **Duration (Min):** This value will be the time, in minutes, it takes an Eligibility Specialist to process the task/activity on the case.
 - For cases that are “In Progress”, the duration field will be a dash (minus sign) for the respective row.

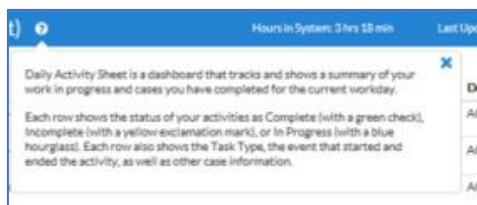
At the header level of widget shows the time the selected Eligibility Specialist has spent in the ANGIE system in the format: **Hours in System: X hrs YY min**

- Selection of the **Refresh** button at the header of this widget will refresh the data for the **Daily Activity** widget. Consequently, the last updated timestamp will also update.
- Selecting **Back** navigates the Manager to the previous page (Supervisor View).
- Selecting **Back to Citywide Summary** navigates Manager to the default Citywide View.

Help Text - Team’s Daily Activity Page



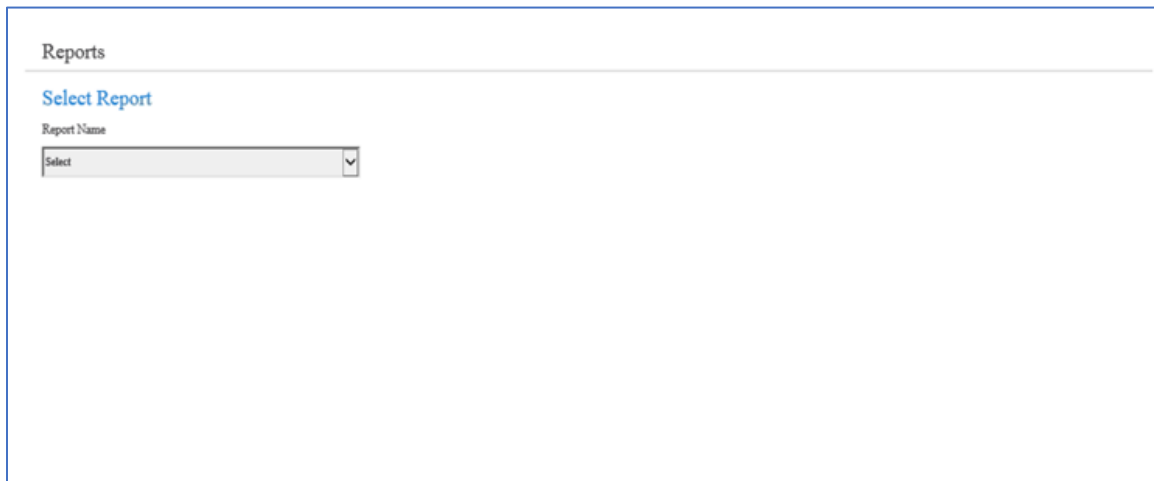
Help Text on Eligibility Specialist’s Daily Activity Sheet:



11. Reports Page

The Manager will have access to the **Reports** page from the left navigation pane and can generate the following reports:

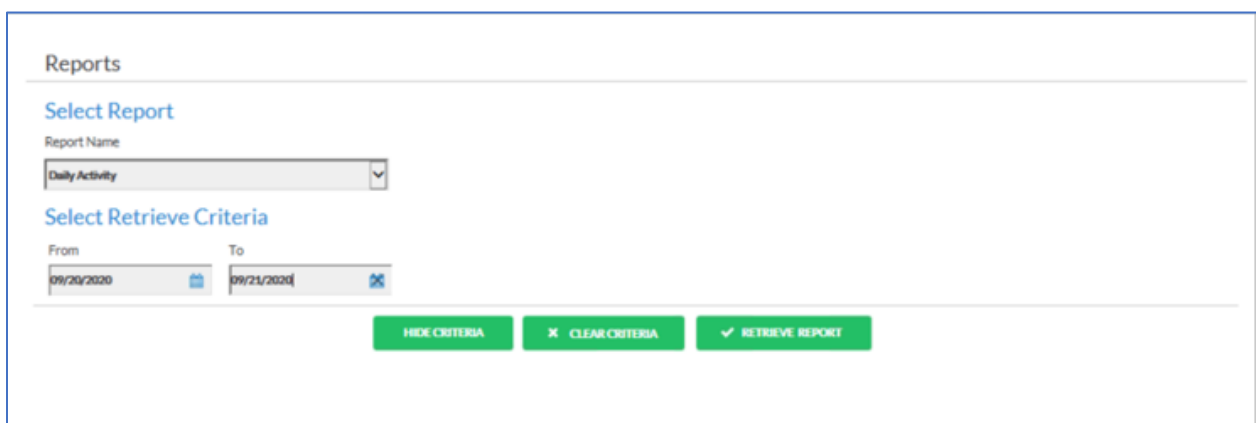
- **Daily Activity**
- **Deferrals**
- **Staff Overview**
- **Timings**
- **Work Outstanding**



The screenshot shows the 'Reports' section of the interface. Under the heading 'Select Report', there is a 'Report Name' label and a dropdown menu. The dropdown menu currently displays 'Select' as the selected option.

12. Daily Activity Report

The Manager can generate the **Daily Activity** report from the **Reports** page of the ANGIE system. This report provides information to the Manager on the Daily Activity snapshots (as of midnight that day) for the selected date range, allowing management to review progress made by the selected staff. After selecting **Daily Activity** from the report dropdown, the Manager must enter the **From** and **To** date range as seen below.



The screenshot shows the 'Reports' section with 'Daily Activity' selected in the 'Report Name' dropdown. Below this, the 'Select Retrieve Criteria' section is visible, featuring 'From' and 'To' date input fields. The 'From' field contains '09/20/2020' and the 'To' field contains '09/21/2020'. At the bottom of the form, there are three green buttons: 'HIDE CRITERIA', 'CLEAR CRITERIA', and 'RETRIEVE REPORT'.

- Selecting the **Retrieve Report** button will display the **Detailed Report – Daily Activity** section. The report will be displayed within the **Detailed Report - Daily Activity** section of the page. The default view of this report will hide the Search Criteria as seen below.

Reports

[SHOW CRITERIA](#)

Detailed Report - Daily Activity 📌 Date 09/20/2020 to 09/21/2020

Select Search By Item [SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Date	Time	Status	Case Number	Case Name	Task	Start Event	Started From	WMS Status	End Event	SPOS Status	SPOS R Code
9/21/2020	09:44	Complete			Application	Interview Started	Case Search	AP	Complete Interview	AP	
9/21/2020	09:00	Complete			Application	ESNAP Processing	Case Search	AP	Processing Complete	SI	Q22
9/21/2020	10:25	Complete			Recert	Mandated Verification Received - Full	Get Next	AC	Selective Case Review sent to WMS	AC	A30
9/20/2020	10:15	Complete			Case Change	Change Case Ready	Get Next	AC	Deferred/Pending Change Verification	AC	A30
9/20/2020	15:13	Incomplete			Application	Returned by Supervisor	Get Next	AP	Suspend Processing	AP	

Reports

[SHOW CRITERIA](#)

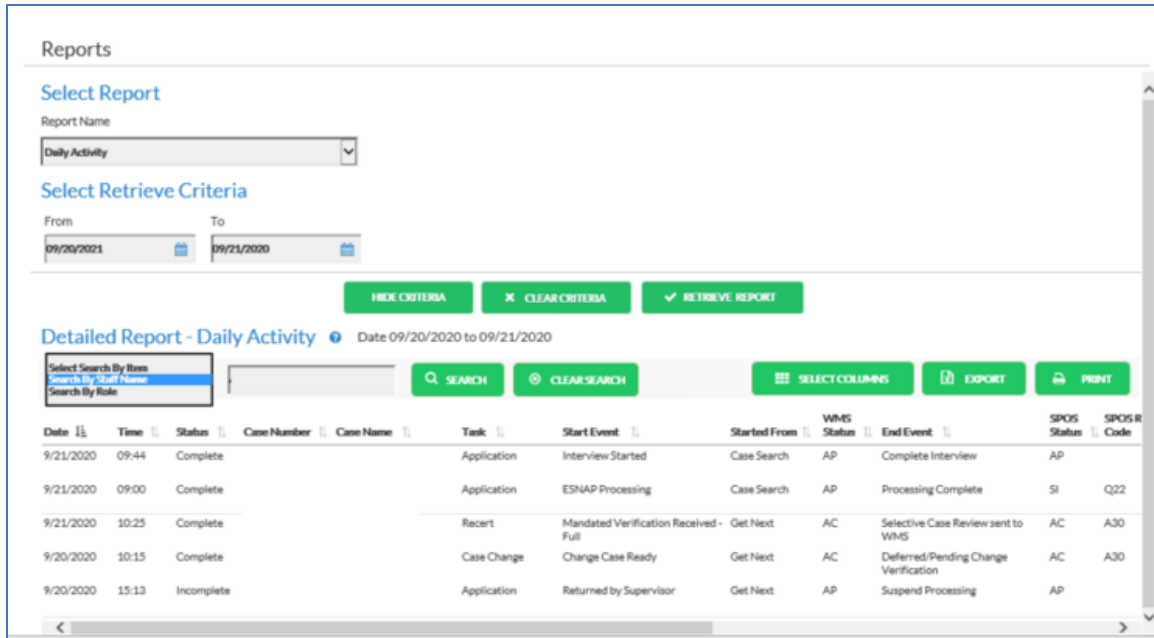
Detailed Report - Daily Activity 📌 Date 09/20/2020 to 09/21/2020

Select Search By Item [SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Started From	WMS Status	End Event	SPOS Status	SPOS Reason Code	HH Size	Duration (Mins)	Worker	Supervisor	Manager	Regional
Case Search	AP	Complete Interview	AP		8	50				
Case Search	AP	Processing Complete	SI	Q22	8	5				
Get Next	AC	Selective Case Review sent to WMS	AC	A30	2	30				
Get Next	AC	Deferred/Pending Change Verification	AC	A30	1	15				
Get Next	AP	Suspend Processing	AP		4	75				

- Selection of the **Show Criteria** button will display the Selected Retrieve Criteria as seen below:
 - The Manager can further search **By Staff Name** or **By Role** (SNAP Eligibility Specialist, SNAP Supervisor, SNAP Manager, SNAP Regional, Clerical Associate).
 - Columns consist of Date, Time, Status, Case Number, Task, Start Event, Started From, WMS Status, End Event, SPOS Status, SPOS Reason Code, HH Size, Duration (Mins), Worker, Supervisor, Manager, and Regional.
 - Horizontal scroll allows the Manager to scroll horizontally.

Attachment D Manager Role
ANGIE Release 1 Notes



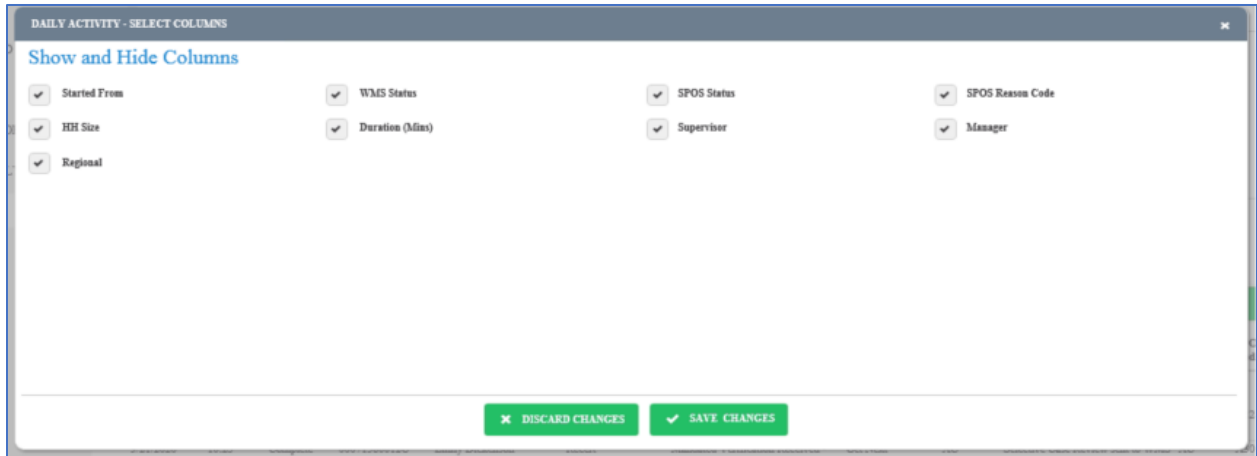
The Manager will be able to Hide (the filter criteria), Clear (the filter criteria), and Retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Manager what filter criteria was specified as seen above.
- The Manager will be able to show/hide the filter criteria at the top of each report.

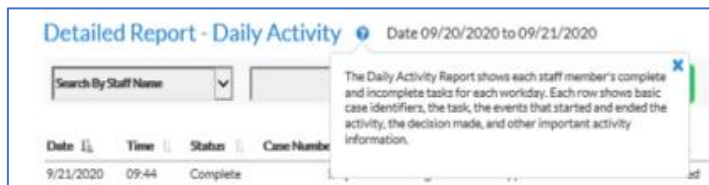
The report has additional functions that allow the Manager to Select Columns, Print, and Export the data:

- Selecting Print will generate a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option will allow export to Excel.
- Upon clicking the **Select Columns** button, the Manager will see a modal window to choose the desired columns for the report. **Save changes** will apply only to the selected columns of the report.

Attachment D Manager Role ANGIE Release 1 Notes



Help Text displayed for Daily Activity report within the Detailed Report section:

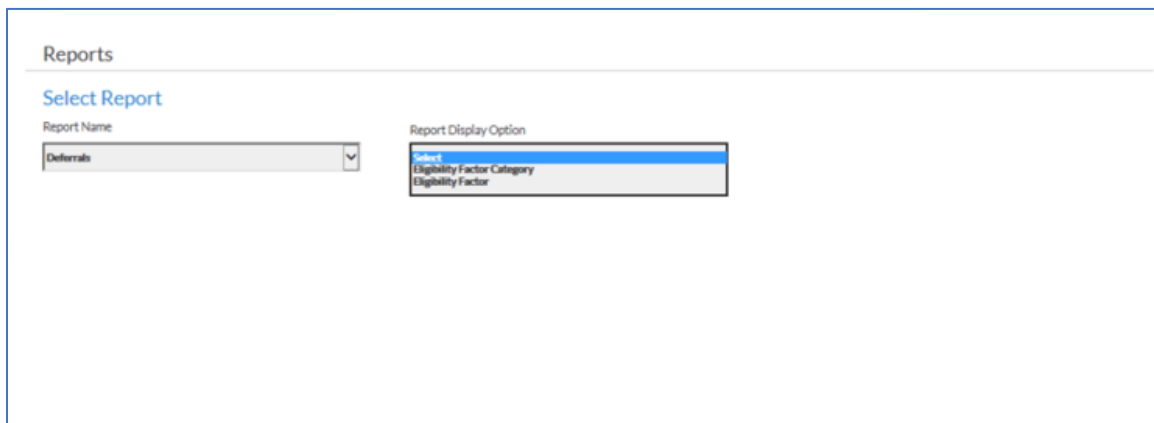


13. Deferrals Report

The Manager can generate the **Deferrals** report from the Reports page of the ANGIE system. This report will display all deferrals initiated for Applications and Recertifications broken down by the **Eligibility Factor** and the **Eligibility Factor Category** for a given date range.

Deferrals Report – Eligibility Factor

- Upon selection of the **Deferrals** option from the Report Name dropdown, the **Report Display Option** dropdown consisting of **Eligibility Factor Category** and **Eligibility Factor** will be displayed for the Manager.



- After **Eligibility Factor** is selected, the Manager will see the **Task** dropdown consisting of **All Tasks**, **Applications**, and **Recertifications**. **All Tasks** is selected in below screen.

The screenshot shows a web interface for generating reports. It is titled "Reports" and has a sub-section "Select Report". Under "Select Report", there are three dropdown menus: "Report Name" (set to "Deferrals"), "Report Display Option" (set to "Eligibility Factor"), and "Task" (set to "All Tasks"). Below this is a "Select Retrieve Criteria" section with two date input fields: "Date From" and "Date To", each with a calendar icon. At the bottom of the form are three green buttons: "HIDE CRITERIA", "X CLEAR CRITERIA", and "✓ RETRIEVE REPORT".

Note:

- When the **Task** filter is set as **Applications**, the Manager must have an additional filter of **File Date** that allows them to set the date range of SNAP file dates for the report output.
- When the **Task** filter is set as **Recertifications**, the Manager must have an additional filter of **Interview Date** that allows them to set the date range of the interview month for the report output. Note that a full month date range should be selected (beginning of a month and end of a month), as the Recertification data is based on the Interview Month cohort and NOT the actual month the applicant/participant conducted their Recertification interview. It should also be noted that the Interview Date is based on the Original Appointment Date.
- When the **Task** filter is set as **All Tasks**, the Manager must have an additional filter for Date Range, which will be applied to Application tasks as File Date and Recertification tasks as Interview Date for the report output. Note that a full month date range should be selected (beginning of a month and end of a month), as the Recertification data is based on the Interview Month cohort and NOT the actual month the applicant/participant conducted their Recertification interview

Attachment D Manager Role
 ANGIE Release 1 Notes

The Manager must enter the appropriate date range as seen below.

- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria.

Detailed Report - Deferrals By Eligibility Factor (All Tasks) Date 11/01/2020 to 11/30/2020

	Total	Applications Interviews	Applications Processing	Recertifications Interviews	Recertifications Processing
Tasks Completed	2917	142	1543	132	1100
Deferrals	560	102	221	101	136
Percent Deferred of Completed	19%	72%	14%	77%	12%

Deferrals by		Deferrals	Applications Interviews		Applications Processing		Recertifications Interviews		Recertifications Processing	
Eligibility Factor Category	Eligibility Factor	Count	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Age	Age	214	65	64%	45	20%	69	68%	35	26%
Citizenship	U.S. Citizenship	189	72	71%	30	14%	72	71%	15	11%
Dependent Care Cost/Other Expenses	Child Care/Dependent Care	167	56	55%	29	13%	70	69%	12	9%
Dependent Care Cost/Other Expenses	Child Support Expense	120	14	14%	28	13%	68	67%	10	7%

Attachment D Manager Role
ANGIE Release 1 Notes

- Selection of the **Show Criteria** button will display the selected criteria as seen below.

The screenshot shows a web interface for generating reports. At the top, there are three dropdown menus: 'Report Name' (set to 'Deferrals'), 'Report Display Option' (set to 'Eligibility Factor'), and 'Task' (set to 'All Tasks'). Below these are date pickers for 'Date From' (11/01/2020) and 'Date To' (11/30/2020). Three green buttons are visible: 'HIDE CRITERIA', 'CLEAR CRITERIA', and 'RETRIEVE REPORT'. The main report title is 'Detailed Report - Deferrals By Eligibility Factor (All Tasks)' with a date range of 11/01/2020 to 11/30/2020. There are 'EXPORT' and 'PRINT' buttons. The report contains two tables.

	Total	Applications Interviews	Applications Processing	Recertifications Interviews	Recertifications Processing
Tasks Completed	2917	142	1543	132	1100
Deferrals	500	102	221	101	130
Percent Deferred of Completed	19%	72%	14%	77%	12%

Eligibility Factor Category	Eligibility Factor	Deferrals	Applications Interviews		Applications Processing		Recertifications Interviews		Recertifications Processing	
			Count	Percent	Count	Percent	Count	Percent	Count	Percent
Age	Age	214	65	64%	45	20%	69	68%	35	26%
Citizenship	U.S. Citizenship	189	72	71%	30	14%	72	71%	15	11%
Dependent Care Cost/Other Expenses	Child Care/Dependent Care	167	56	55%	29	13%	70	69%	12	9%
Dependent Care Cost/Other Expenses	Child Support Expense	120	14	14%	28	13%	68	67%	10	7%
Disabled/Incapacitated	Blind, Sick, Disabled or Activity Limited	118	15	15%	27	12%	67	66%	9	7%
Disabled/Incapacitated	Drug or alcohol dependent	110	14	14%	27	12%	67	66%	8	6%
Earned Income	Employed	112	12	12%	28	12%	66	65%	8	6%

The Manager will be able to Hide (the filter criteria), Clear (the filter criteria), and Retrieve (the report):

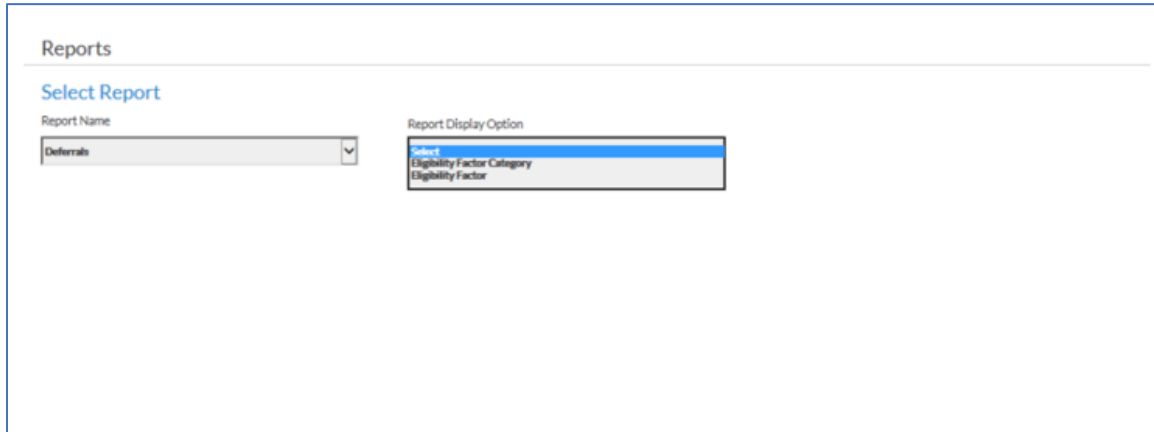
- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Manager what filter criteria was specified as seen
- The Manager will be able to show/hide the filter criteria at the top of each report

The report has additional functions that allow the Manager to Print and Export the data.

- Selecting Print will generate a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option will allow export to Excel.

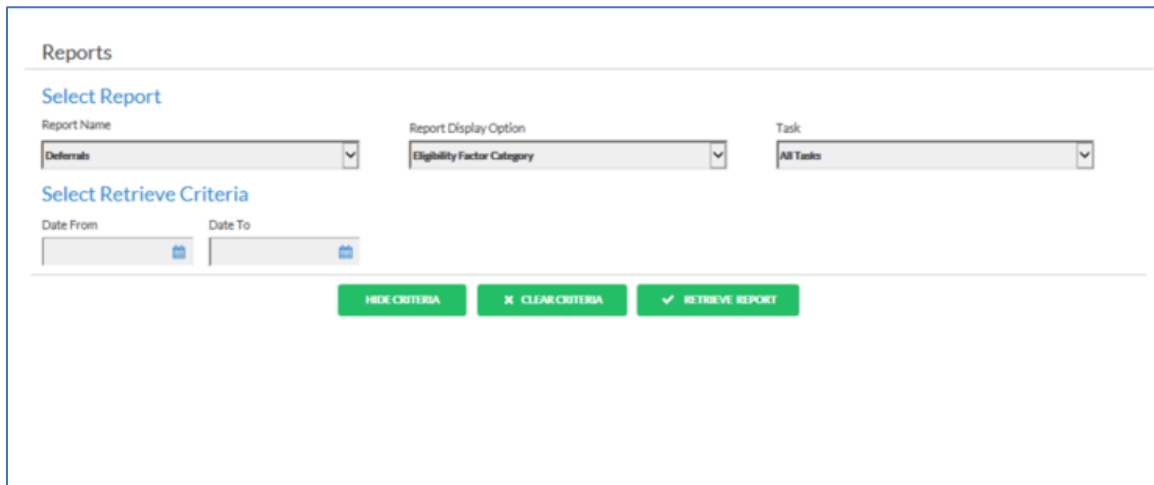
Deferrals Report – Eligibility Factor Category

- Upon selection of the **Deferrals** option from the Report Name dropdown, the Manager will be displayed with the **Report Display Option** dropdown consisting of **Eligibility Factor Category** and **Eligibility Factor**.



The screenshot shows a web interface titled "Reports" with a sub-section "Select Report". There are two dropdown menus. The first, labeled "Report Name", has "Deferrals" selected. The second, labeled "Report Display Option", is open and shows two options: "Eligibility Factor Category" (highlighted) and "Eligibility Factor".

- After **Eligibility Factor Category** is selected, the Manager will see the **Task** dropdown consisting of **All Tasks**, **Applications**, and **Recertifications**. **All Tasks** is selected in below screen.



The screenshot shows the "Reports" section with "Select Report" options. The "Report Name" dropdown is "Deferrals", "Report Display Option" is "Eligibility Factor Category", and "Task" is "All Tasks". Below these are "Date From" and "Date To" fields with calendar icons. At the bottom are three buttons: "HIDE CRITERIA", "CLEAR CRITERIA", and "RETRIEVE REPORT".

Note:

- When the **Task** filter is set as **Applications**, the Manager must have an additional filter of **File Date** that allows them to set the date range of SNAP File Dates for the report output.
- When the **Task** filter is set as **Recertifications**, the Manager must have an additional filter of **Interview Date** that allows them to set the date range of the interview month for the report output. Note that a full month date range should be selected (beginning of a month and end of a month), as the Recertification data is based on the Interview Month cohort and NOT the actual month the

- applicant/participant conducted their Recertification interview. It should also be noted that the Interview Date is based on the Original Appointment Date.
- When the **Task** filter is set as **All Tasks**, the Manager must have an additional filter for Date Range, which will be applied to Applications tasks as File Date and Recertification tasks as Interview Date for the report output. Note that a full month date range should be selected (beginning of a month and end of a month), as the Recertification data is based on the Interview Month cohort and NOT the actual month the applicant/participant conducted their Recertification interview.

The Manager will see the **Select Retrieve Criteria** section and must enter the appropriate date range as seen below.

The screenshot displays the 'Reports' interface. Under the 'Select Report' section, there are three dropdown menus: 'Report Name' set to 'Deferrals', 'Report Display Option' set to 'Eligibility Factor Category', and 'Task' set to 'All Tasks'. Below this is the 'Select Retrieve Criteria' section, which includes 'Date From' (11/01/2020) and 'Date To' (11/30/2020) fields, each with a calendar icon. At the bottom of the form are three buttons: 'HIDE CRITERIA', 'X CLEAR CRITERIA', and '✓ RETRIEVE REPORT'.

- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria.

Attachment D Manager Role
 ANGIE Release 1 Notes

Reports

[SHOW CRITERIA](#)

Detailed Report - Deferrals By Eligibility Factor Category (All Tasks) Date 11/01/2020 to 11/30/2020

[EXPORT](#) [PRINT](#)

	Total	Applications Interviews	Applications Processing	Recertifications Interviews	Recertifications Processing
Tasks Completed	2917	142	1543	132	1100
Deferrals	560	102	221	101	136
Percent Deferred of Completed	19%	72%	14%	77%	12%

[EXPORT](#) [PRINT](#)

Deferrals by Eligibility Factor Category and Task Type

	Deferrals	Applications Interviews		Applications Processing		Recertifications Interviews		Recertifications Processing	
		Count	Percent	Count	Percent	Count	Percent	Count	Percent
Earned Income	172	65	64%	20	9%	66	65%	21	15%
Residence	144	72	71%	15	7%	52	51%	5	4%
Citizenship	110	56	55%	17	8%	32	32%	5	4%
Immigration	49	14	14%	13	6%	18	18%	4	3%
Disabled/Incapacitated	48	15	15%	15	7%	14	14%	4	3%
Dependent Care Cost / Other Expenses	43	14	14%	13	6%	12	12%	4	3%
Identity	39	12	12%	12	5%	11	11%	4	3%
School Attendance	31	14	14%	11	5%	2	2%	4	3%
Age	22	5	5%	5	2%	9	9%	3	2%
Medical Expenses	22	2	2%	9	4%	8	8%	3	2%
Resources	23	8	4%	8	4%	4	4%	3	2%
Shelter Expense	22	6	3%	8	4%	5	5%	3	2%
Household Composition	20	4	2%	8	4%	6	6%	2	1%

- Select the **Show Criteria** button to display the selected criteria as seen below.

Attachment D Manager Role
ANGIE Release 1 Notes

Detailed Report - Deferrals By Eligibility Factor Category (All Tasks) 11/01/2020 to 11/30/2020

	Total	Applications Interviews	Applications Processing	Recertifications Interviews	Recertifications Processing
Tasks Completed	2917	142	1543	132	1100
Deferrals	580	102	231	101	138
Percent Deferred of Completed	19%	72%	14%	77%	12%

Deferrals by Eligibility Factor Category and Task Type	Deferrals	Applications Interviews		Applications Processing		Recertifications Interviews		Recertifications Processing	
		Count	Percent	Count	Percent	Count	Percent	Count	Percent
Earned Income	172	65	64%	20	9%	66	65%	21	15%
Residence	144	72	71%	15	7%	32	31%	5	4%
Citizenship	110	56	55%	17	8%	32	32%	5	4%
Immigration	49	14	14%	13	8%	18	18%	4	3%
Disabled Incapacitated	48	15	15%	15	7%	14	14%	4	3%
Dependent Care Cost / Other Expenses	43	14	14%	13	8%	12	12%	4	3%
Identity	39	12	12%	12	3%	11	11%	4	3%
School Attendance	31	14	14%	11	3%	2	2%	4	3%
Age	22	5	3%	5	2%	9	9%	3	2%
Medical Expenses	22	2	2%	9	4%	8	8%	3	2%
Resources	23	8	4%	8	4%	4	4%	3	2%
Shelter Expense	22	6	3%	8	4%	5	3%	3	2%

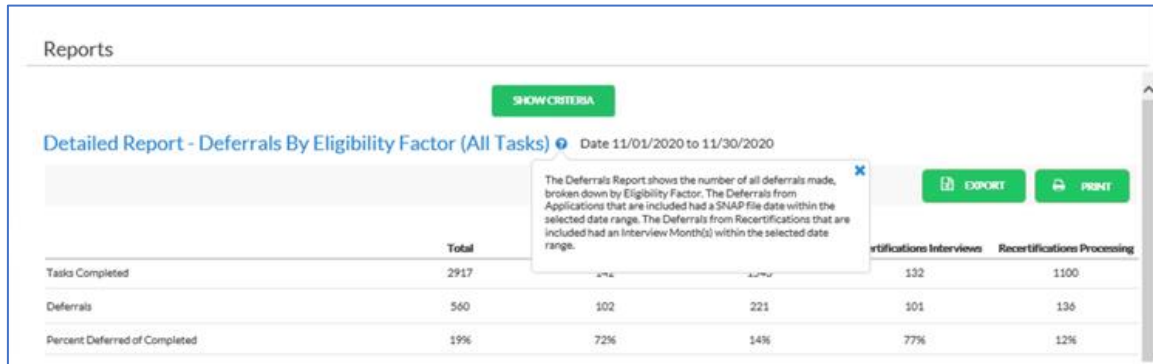
The Manager will be able to Hide (the filter criteria), Clear (the filter criteria), and Retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Manager what filter criteria was specified as seen
- The Manager will be able to show/hide the filter criteria at the top of each report

The report has additional functions that allow the Manager to Print and Export the data:

- Selecting Print will generate a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option will allow export to Excel.

Help Text displayed for Deferrals report:

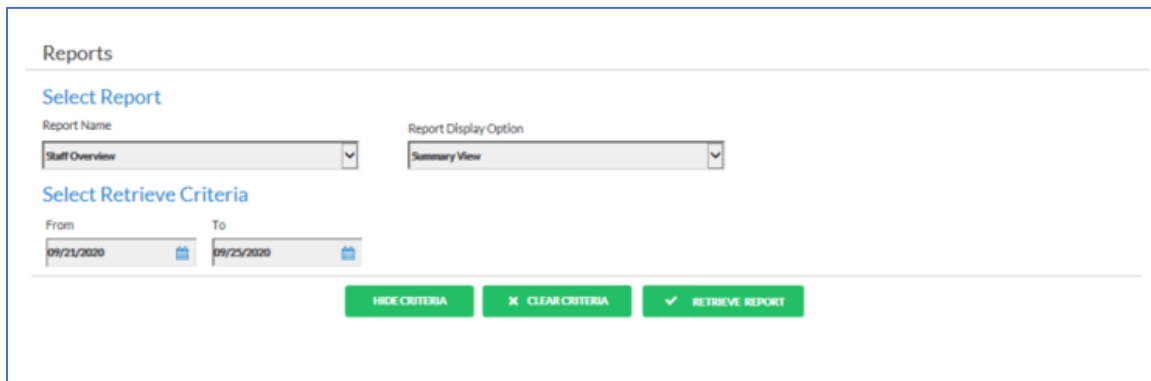


14. **Staff Overview Report**

The Manager can generate the **Staff Overview** report from the Reports page of the ANGIE system. This report will provide information about the Staff in terms of their login times, logout times, hours in system, hold and return activity based on a date range.

Staff Overview Report – Summary View

- After selecting **Staff Overview** from the Report Name dropdown, the Manager must select a view from **Report Display Option** dropdown consisting of Summary View and Detail View. The screen below shows when **Summary View** is selected. The Manager will see the **Select Retrieve Criteria** section and is required to enter the **From** and **To** date range.



- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria as seen below.

Attachment D Manager Role
ANGIE Release 1 Notes

Reports

[SHOW CRITERIA](#)

Detailed Report - Staff Overview (Summary View) Date 09/21/2020 to 09/25/2020

Select Search By Item [SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Date	Name	Role	Login Time	Logout Time	Hours in System	Returns	Hold Duration (Mins)	Supervisor	Manager	Regional
9/21/2020		SNAP Eligibility Specialist	09:00	17:15	6 hrs. 49 mins	1	37			
9/22/2020		SNAP Eligibility Specialist	09:02	17:00	6 hrs. 45 mins	4	20			
9/23/2020		SNAP Eligibility Specialist	08:05	16:30	6 hrs. 59 mins	2	90			
9/24/2020		SNAP Eligibility Specialist	09:10	13:16	4 hrs. 3 mins	6	45			
9/25/2020		SNAP Eligibility Specialist	08:51	17:03	7 hrs. 5 mins	0	5			
9/21/2020		SNAP Eligibility Specialist	08:02	16:30	6 hrs. 59 mins	2	14			
9/22/2020		SNAP Eligibility Specialist	09:04	13:19	4 hrs. 3 mins	3	45			
9/23/2020		SNAP Eligibility Specialist	08:58	17:03	7 hrs. 5 mins	0	8			
9/24/2020		SNAP Eligibility Specialist	09:06	17:03	6 hrs. 18 mins	1	18			
9/25/2020		SNAP Eligibility Specialist	09:17	17:01	6 hrs. 45 mins	4	20			

- Select the **Show Criteria** button to display the criteria as seen below.

Reports

Select Report

Report Name: Report Display Option:

Select Retrieve Criteria

From: To:

[HIDE CRITERIA](#) [CLEAR CRITERIA](#) [RETRIEVE REPORT](#)

Detailed Report - Staff Overview (Summary View) Date 09/21/2020 to 09/25/2020

Select Search By Item [SEARCH](#) [CLEAR SEARCH](#) [SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Select Search By Item
Search By Staff Name
Search By Role

Date	Name	Role	Login Time	Logout Time	Hours in System	Returns	Hold Duration (Mins)	Supervisor	Manager	Regional
09/21/2020		SNAP Eligibility Specialist	09:00	17:15	6 hrs. 49 mins	1	37			
09/22/2020		SNAP Eligibility Specialist	09:02	17:00	6 hrs. 45 mins	4	20			
09/23/2020		SNAP Eligibility Specialist	08:05	16:30	6 hrs. 59 mins	2	90			
09/24/2020		SNAP Eligibility Specialist	09:10	13:16	4 hrs. 3 mins	6	45			

The Manager can further search by **Staff Name** or **By Role** (SNAP Eligibility Specialist, SNAP Supervisor, SNAP Manager, SNAP Regional, Clerical Associate). The columns for this report consist of Date, Name, Role, Login Time, Logout Time, Hours in System, Returns, Hold Duration (Mins), Supervisor, Manager, and Regional. All columns are sortable.

The Manager will be able to Hide (the filter criteria), Clear (the filter criteria), and Retrieve (the report):

- The selected criteria will be displayed with the report title.

Attachment D Manager Role
ANGIE Release 1 Notes

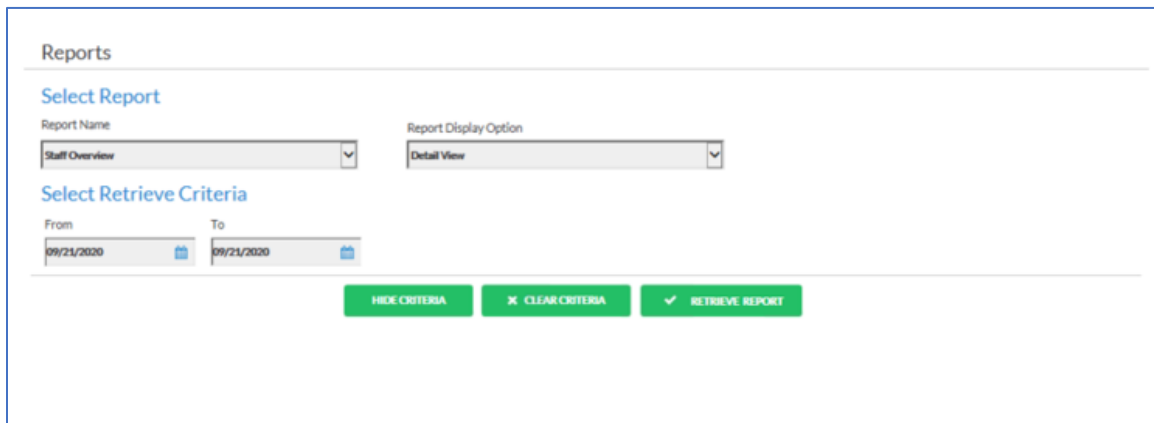
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Manager what filter criteria was specified as seen above.
- The Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Manager to Select Columns, Print, and Export the data:

- Selecting Print will generate a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option will allow export to Excel.

Staff Overview Report – Detail View

- After selecting **Staff Overview** from the Report Name dropdown, the Manager must select a view from the **Report Display Option** dropdown consisting of Summary View and Detail View. The screen below shows when **Detail View** is selected. The Manager will see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range.



The screenshot shows a web interface for configuring a report. At the top, it says "Reports". Below that is a section titled "Select Report" with two dropdown menus: "Report Name" (set to "Staff Overview") and "Report Display Option" (set to "Detail View"). Below this is a section titled "Select Retrieve Criteria" with two date input fields: "From" (set to "09/21/2020") and "To" (set to "09/21/2020"). At the bottom of the form are three green buttons: "HIDE CRITERIA", "X CLEAR CRITERIA", and "✓ RETRIEVE REPORT".

- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria as seen below.

Attachment D Manager Role
ANGIE Release 1 Notes

Reports

[SHOW CRITERIA](#)

Detailed Report - Staff Overview (Detail View) Date 09/21/2020 to 09/21/2020

Select Search By Item [SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Date	Name	Role	Action	Reason	Start Time	End Time	Hold Duration (Mins)	Supervisor	Manager	Regional
09/21/2020		SNAP Eligibility Specialist	Log In	Processing	09:00					
09/21/2020		SNAP Eligibility Specialist	Hold	Restroom	10:09	10:29	10			
09/21/2020		SNAP Eligibility Specialist	Return	Conflict of Interest	10:45					
09/21/2020		SNAP Eligibility Specialist	Hold	Lunch	12:05	13:10	65			
09/21/2020		SNAP Eligibility Specialist	Log Out	Idle Timeout	12:20					
09/21/2020		SNAP Eligibility Specialist	Log In	Interviews	13:09					
09/21/2020		SNAP Eligibility Specialist	Hold	Supervisor Help	14:10	14:55	45			
09/21/2020		SNAP Eligibility Specialist	Hold	Break	15:13	15:25	12			
09/21/2020		SNAP Eligibility Specialist	Log Out	End of Shift		17:15				
09/21/2020		SNAP Eligibility Specialist	Log In	Interviews	09:11					

- Select the **Show Criteria** button to display the criteria as seen below.

Reports

Select Report

Report Name: Report Display Option:

Select Retrieve Criteria

From: To:

[HIDE CRITERIA](#) [X CLEAR CRITERIA](#) [✓ RETRIEVE REPORT](#)

Detailed Report - Staff Overview (Detail View) Date 09/21/2020 to 09/21/2020

Select Search By Item [SEARCH](#) [SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Select Search By Item
Search By Staff Name
Search By Role

Date	Name	Role	Action	Reason	Start Time	End Time	Hold Duration (Mins)	Supervisor	Manager	Regional
09/21/2020		SNAP Eligibility Specialist	Log In	Processing	09:00					
09/21/2020		SNAP Eligibility Specialist	Hold	Restroom	10:09	10:29	10			
09/21/2020		SNAP Eligibility Specialist	Return	Conflict of Interest	10:45					
09/21/2020		SNAP Eligibility Specialist	Hold	Lunch	12:05	13:10	65			

The Manager can further search by **Staff Name** or **By Role** (SNAP Eligibility Specialist, SNAP Supervisor, SNAP Manager, SNAP Regional, Clerical Associate). The columns for this report consist of Date, Name, Role, Action, Reason, Start Time, End Time, Hold Duration (Mins), Supervisor, Manager, and Regional. All columns are sortable.

The Manager will be able to Hide (the filter criteria), Clear (the filter criteria), and Retrieve (the report):

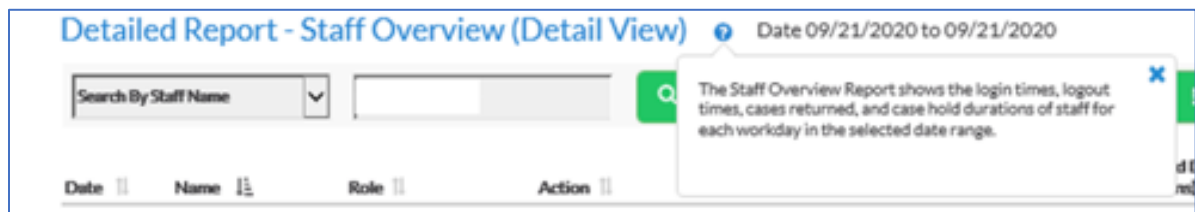
- The selected criteria will be displayed with the report title.

- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Manager what filter criteria was specified as seen above.
- The Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Manager to Select Columns, Print, and Export the data:

- Selecting Print will generate a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option will allow export to Excel.

Help Text displayed for the Staff Overview report within Detailed Report section:



15. Timings Report

The Manager can generate the Timings report from the Reports page of the ANGIE system. This report provides information on the time taken to complete the work in SPOS activities so that the Manager can determine how long actions are taken at each step of the lifecycle.

Timings Report – Task Status View

- After selecting the **Timings** option from the Report Name dropdown, the Manager will be displayed with the **Report Display Option** dropdown consisting of **Task Status View** and **Activity View**. The screen below shows **Task Status View** selected. The Manager will see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range. From the **Unit** dropdown, the Manager must select an option consisting of **Citywide**, **Regional**, and **Manager**. The screen below shows **Citywide** selected.

Attachment D Manager Role
ANGIE Release 1 Notes

Reports

Select Report

Report Name: Timings | Report Display Option: Task Status View

Select Retrieve Criteria

From: 09/21/2020 | To: 09/25/2020 | Unit: Citywide

HIDE CRITERIA | CLEAR CRITERIA | RETRIEVE REPORT

- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page. The default view of this report will hide the criteria as seen below.

Reports

SHOW CRITERIA

Detailed Report - Timings (Task Status view) | Date 09/21/2020 to 09/25/2020, Citywide

Select Search By Item | SELECT COLUMNS | EXPORT | PRINT

Unit	Task	Status	Count	Mean Duration (Min)	Median Duration (Min)
Citywide	Application	Interview	17461	5.183	2.917
Citywide	Application	Processing	15002	3.086	2.133
Citywide	Application	Supervisory	12450	10.566	6.733
Citywide	Change Case	Processing	15002	3.086	2.133
Citywide	Change Case	Supervisory	12450	10.566	6.733
Citywide	Document Review	Processing	15002	3.086	2.133
Citywide	Recertification	Interview	15777	2.157	1.117
Citywide	Recertification	Processing	12176	1.695	1.05
Citywide	Recertification	Supervisory	11533	6.064	1.05

Select the **Show Criteria** button to display the screen below.

The screenshot displays the 'Reports' section with the following details:

- Select Report:** Report Name: Timings; Report Display Option: Task Status View
- Select Retrieve Criteria:** From: 09/21/2020; To: 09/25/2020; Unit: Citywide
- Buttons:** HIDE CRITERIA, CLEAR CRITERIA, RETRIEVE REPORT
- Detailed Report - Timings (Task Status view):** Date 09/21/2020 to 09/25/2020, Citywide
- Search and Action Buttons:** Search By Task, Select, SEARCH, CLEAR SEARCH, SELECT COLUMNS, EXPORT, PRINT

Unit	Task	Status	Count	Mean Duration (Mins)	Median Duration (Mins)
Citywide	Application	Interview	17461	5.183	2.917
Citywide	Application	Processing	15002	3.086	2.133
Citywide	Application	Supervisory	12450	10.566	6.733
Citywide	Change Case	Processing	15002	3.086	2.133

Within the Detailed Report section, the Manager can further **Search By Task** consisting of **Applications, Recertifications, Case Changes, Document Reviews**. This will further refine the search results based on the selected Task. The columns for this report consist of **Unit, Task, Status, Count, Mean Duration (Mins), and Median Duration (Mins)**. All columns are sortable.

The Manager will be able to Hide (the filter criteria), Clear (the filter criteria), and Retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Manager what filter criteria was specified as seen above.
- The Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Manager to Select Columns, Print, and Export the data:

- Selecting Print will generate a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option will allow export to Excel.

Timings Report – Activity View

- After selecting the **Timings** option from the Report Name dropdown, the Manager will be displayed with the **Report Display Option** dropdown consisting of **Task Status View** and **Activity View**. The screen below shows **Activity View** selected. The Manager will see the **Select Retrieve Criteria** section and is required to enter the **From** and **To** date range. From the **Unit** dropdown, the

Manager is required to select an option consisting of **Citywide**, **Regional**, and **Manager**. The screen below shows **Citywide** selected.

Reports

Select Report

Report Name: Timings | Report Display Option: Activity View

Select Retrieve Criteria

From: 09/21/2020 | To: 09/25/2020 | Unit: Select

HIDE CRITERIA | X CLEAR CRITERIA | RETRIEVE REPORT

- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page. The default view of this report will hide the criteria as seen below.

Reports

SHOW CRITERIA

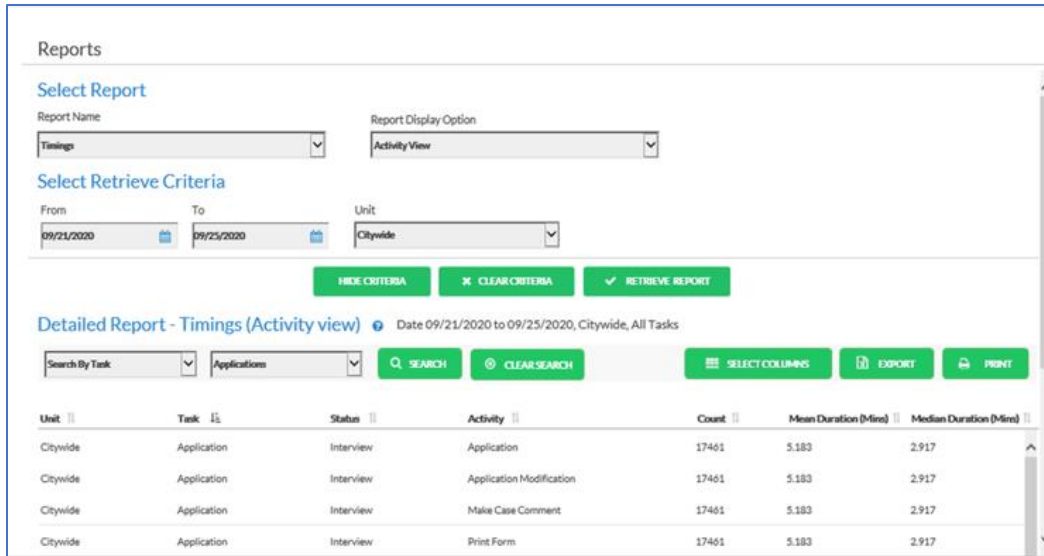
Detailed Report - Timings (Activity view) | Date: 09/21/2020 to 09/25/2020, Citywide

Select Search By Item | SELECT COLUMNS | EXPORT | PRINT

Unit	Task	Status	Activity	Count	Mean Duration (Mins)	Median Duration (Mins)
Citywide	Application	Interview	Application	17461	5.183	2.917
Citywide	Application	Interview	Application Modification	17461	5.183	2.917
Citywide	Application	Interview	Make Case Comment	17461	5.183	2.917
Citywide	Application	Interview	Print Form	17461	5.183	2.917
Citywide	Application	Processing	Application	15002	3.086	2.133
Citywide	Application	Processing	Application Modification	15002	3.086	2.133
Citywide	Application	Processing	EC - Application	15002	3.086	2.133
Citywide	Application	Processing	EC - ESNAP	15002	3.086	2.133
Citywide	Application	Processing	EC - FTK Application	15002	3.086	2.133
Citywide	Application	Processing	ESNAP	15002	3.086	2.133

- Select the **Show Criteria** button to display the screen below.

Attachment D Manager Role
ANGIE Release 1 Notes



Within the Detailed Report section, the Manager can further **Search By Task** consisting of **Applications**, **Recertifications**, **Case Changes**, and **Document Reviews**. This will further refine the search results based on the selected Task. The columns for this report consist of **Unit**, **Task**, **Status**, **Activity**, **Count**, **Mean Duration (Mins)**, and **Median Duration (Mins)**. All columns are sortable.

The Manager will be able to Hide (the filter criteria), Clear (the filter criteria), and Retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Manager what filter criteria was specified as seen above.
- The Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Manager to Select Columns, Print, and Export the data:

- Selecting Print will generate a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option will allow export to Excel.

Help Text displayed for Timings Report on the Detailed Report section:



16. Work Outstanding Report

The Manager can generate the Work Outstanding report from the Reports page of the ANGIE system. This report will provide information on the work that is outstanding based on the criticality.

Work Outstanding Report – All Tasks

- After selecting the **Work Outstanding** option from the Report Name dropdown, the Manager will be displayed with the **Task** dropdown consisting of **All Tasks**, **AP**, **SI**, **Case Changes**, **Document Reviews**, **Recertifications**, and **All Tasks Export**. The screen below shows **All Tasks** selected. The Manager will see the **Select Retrieve Criteria** section and must select an option from the **Approaching Date Range** dropdown consisting of **Next 7 days**, **This Month**, **Next Month**, and **Date Range**. The screen below shows **Next Month** selected.

The screenshot displays the 'Reports' section of the ANGIE system. Under 'Select Report', the 'Report Name' dropdown is set to 'Work Outstanding' and the 'Task' dropdown is set to 'All Tasks'. Below this, the 'Select Retrieve Criteria' section is visible. The 'Approaching Date Range' dropdown is set to 'Next Month'. The 'Date From' field is set to '30/02/2020' and the 'Date To' field is set to '30/06/2020'. At the bottom of the form, there are three buttons: 'HIDE CRITERIA', 'X CLEAR CRITERIA', and '✓ RETRIEVE REPORT'.

Note:

- When the **Task** filter is set as **Applications (AP)**, the Manager must have an additional filter of **File Date** that allows them to set the date range of SNAP file dates for the report output.
- When the **Task** filter is set as **Applications (SI)**, the Manager must have an additional filter of **Task Due Date** that allows them to set the date range of due dates for the report output.
- When the **Task** filter is set as **Recertifications**, the Manager must have an additional filter of **Interview Month** that allows them to set the date range of the interview month for the report output. Note that a full month date range must be selected (beginning of a month and end of a month), as the Recertification data is based on the **Interview Month** cohort and NOT the actual month the applicant/participant conducted their Recertification interview.

- When the **Task** filter is set as **Case Changes**, the Manager must have an additional filter of **Submission Date** that allows them to set the date range of the interview month for the report output.
- When the **Task** filter is set as **Document Reviews**, the Manager must have an additional filter of **Submission Date** that allows them to set the date range of the interview month for the report output.
- When the **Task** filter is set as **All Tasks** or **All Tasks Export**, the Manager must have the **Date From** and **Date To** range filter, which is applied as follows:
 - For Applications in AP status, this range is used as the File Date retrieval range.
 - For Applications in SI status, this range is used as the Task Due Date retrieval range.
 - For Recertifications, the full interview month(s) for the selected dates is used for the retrieval.
 - For Case Changes, this range is used as the Submission Date retrieval range.
 - For Document Reviews, this range is used as the Submission Date retrieval range.
- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page. The default view of this report will hide the criteria as seen below.

Task	Potential Work	Open Task	Deferred	E.S. Ready to Assign									
				ESHAP	RFI	No Def	FTK	Core Docs	Opt Docs	No Docs	Sup Ret	Error Corr	
All Tasks	255	98	96	145									
Today	0	12	12	29									
Approaching	255	23	21	45									
Urgent	0	7	7	14									
Backlog	0	56	56	57									

Attachment D Manager Role
ANGIE Release 1 Notes

Reports

[SHOW CRITERIA](#)

Detailed Report - Work Outstanding (All Tasks) ● Approaching Date 11/2/2020 - 11/8/2020, Date 10/2/2020 - 10/8/2020

[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Sup. Ready to Assign			Total Open Work	Transmitted to WMS			Pending in WMS		
	Error Corr	AAP	Total		Supervisor Xmit	Direct Xmit	Total	Supervisor Xmit	Direct Xmit	Total
All Tasks				107	446					377
Today				16	69					82
Approaching				27	116					61
Urgent				8	36					50
Backlog				56	225					184

Reports

[SHOW CRITERIA](#)

Detailed Report - Work Outstanding (All Tasks) ● Approaching Date 11/2/2020 - 11/8/2020, Date 10/2/2020 - 10/8/2020

[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Pending in WMS			Completed							
	Supervisor Xmit	Direct Xmit	Total	AC	RJ	CL	Dup App	WD	No Change	CC	Total
All Tasks	377			225							
Today	82			45							
Approaching	61			49							
Urgent	50			41							
Backlog	184			90							

- Select the **Show Criteria** button to display the screen below.

Reports

Select Report

Report Name: Task:

Select Retrieve Criteria

Approaching Date Range: Date From: Date To:

[HIDE CRITERIA](#) [X CLEAR CRITERIA](#) [✓ RETRIEVE REPORT](#)

Detailed Report - Work Outstanding (All Tasks) ● Approaching Date 11/2/2020 - 11/8/2020, Date 10/2/2020 - 10/8/2020

[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Potential Work	Open Task	Deferred	E.S. Ready to Assign						
				ESNAP	RFI	No Def	FTK	Core Docs	Opt Docs	No Docs
All Tasks	255	98	96	145						
Today	0	12	12	29						
Approaching	255	23	21	45						
Urgent	0	7	7	14						
Backlog	0	56	56	57						

Based on the option selected from the Task dropdown, the report will provide the information for the same as seen in above screen. Since **All Tasks** was selected, information for All Tasks will be displayed within the Task column of the **Detailed Report**. The report further breaks down All Tasks across data rows consisting of:

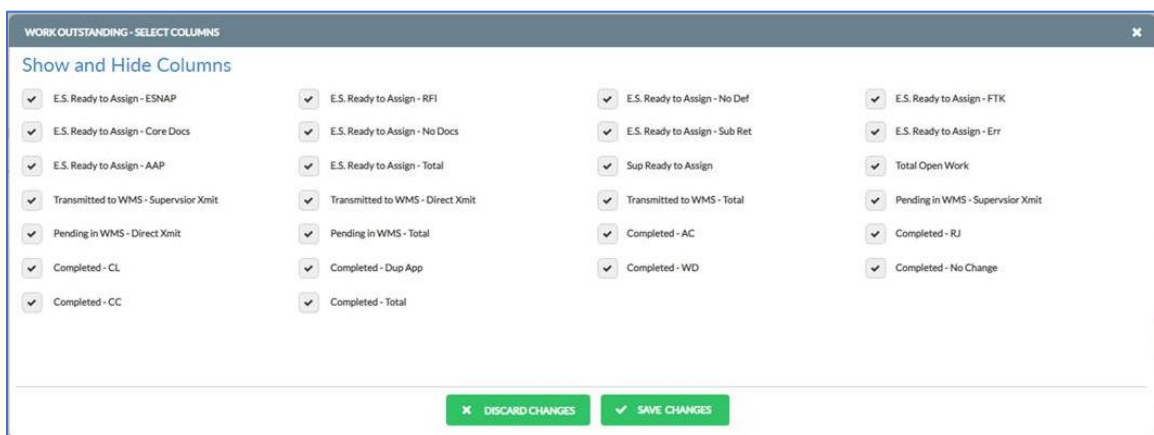
- **Today** - Priority Date Today
- **Approaching** - Coming Due with priority Date in selected date range
- **Urgent** - Late, past Priority Date before Task Due Date
- **Backlog** - Overdue, past Task Due Date

The Horizontal Scroll allows the Manager to scroll horizontally. The Manager will be able to Hide (the filter criteria), Clear (the filter criteria), and Retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Manager what filter criteria was specified as seen above.
- The Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Manager to Select Columns, Print, and Export the data:

- Selecting Print will generate a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option will allow export to Excel.
- Click the **Select Columns** button, to display a modal window for the Manager to choose the desired columns for the report as seen below. **Save changes** will apply only to the selected columns of the report.



Work Outstanding Report – Application (AP)

- After selecting the **Work Outstanding** option from the Report Name dropdown, the Manager will be displayed with the **Task** dropdown consisting of **All Tasks**, **Applications (AP)**, **Application (SI)**, **Case Changes**, **Document Reviews**,

Recertifications, and **All Tasks Export**. The screen below shows **Applications (AP)** selected. The Manager will see the **Select Retrieve Criteria** section and must select an option from the **Approaching Date Range** dropdown consisting of **Next 7 days**, **This Month**, **Next Month**, and **Date Range**. The screen below shows **Next Month** selected.

The screenshot shows a web interface for generating reports. At the top, it says "Reports". Below that is a "Select Report" section with two dropdown menus: "Report Name" set to "Work Outstanding" and "Task" set to "Applications (AP)". Below this is a "Select Retrieve Criteria" section. It has a dropdown for "Approaching Date Range" set to "This Month". To the right are two date input fields: "SNAP File Date From" with the value "10/02/2020" and "SNAP File Date To" with the value "10/08/2020". At the bottom of this section are three green buttons: "VIEW CRITERIA", "CLEAR CRITERIA", and "RETRIEVE REPORT".

Note:

- When the **Task** filter is set as **Applications (AP)**, the Manager must have an additional filter of **File Date** that allows them to set the date range of SNAP file dates for the report output
- When the **Task** filter is set as **Applications (SI)**, the Manager must have an additional filter of **Task Due Date** that allows them to set the date range of due dates for the report output.
- When the **Task** filter is set as **Recertifications**, the Manager must have an additional filter of **Interview Month** that allows them to set the date range of the interview month for the report output. Note that a full month date range should be selected (beginning of a month and end of a month), as the Recertification data is based on the Interview Month cohort and NOT the actual month the applicant/participant conducted their Recertification interview.
- When the **Task** filter is set as **Case Changes**, the Manager must have an additional filter of **Submission Date** that allows them to set the date range of the interview month for the report output.
- When the **Task** filter is set as **Document Reviews**, the Manager must have an additional filter of **Submission Date** that allows them to set the date range of the interview month for the report output.
- When the **Task** filter is set as **All Tasks** or **All Tasks Export**, the Manager must have the **Date From** and **Date To** range filter, which is applied as follows:
 - For Applications in AP status, this range is used as the File Date retrieval range.
 - For Applications in SI status, this range is used as the Task Due Date retrieval range.
 - For Recertifications, the full interview month(s) for the selected dates is used for the retrieval.
 - For Case Changes, this range is used as the Submission Date retrieval range.
 - For Document Reviews, this range is used as the Submission Date retrieval range.

Attachment D Manager Role
 ANGIE Release 1 Notes

- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page. The default view of this report will hide the criteria as seen below.

Reports

[SHOW CRITERIA](#)

Detailed Report - Work Outstanding (Applications-AP) Approaching Date 11/2/2020 - 11/8/2020, SNAP File Date 10/2/2020 - 10/8/2020

[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Potential Work	Open Task	Deferred	E.S. Ready to Assign										
				ESNAP	RFI	No Def	FTK	Core Docs	Opt Docs	No Docs	Sup Ret	Error Corr		
Applications (AP)	0	8	6	35										
Today	0			17										
Approaching	0	8	6	30										
Urgent	0			7										
Backlog	0			1										

Reports

[SHOW CRITERIA](#)

Detailed Report - Work Outstanding (Applications-AP) Approaching Date 11/2/2020 - 11/8/2020, SNAP File Date 10/2/2020 - 10/8/2020

[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Sup. Ready to Assign				Total Open Work	Transmitted to WMS			Pending in WMS	
	Sup Ret	Error Corr	AAP	Total		Supervisor Xmit	Direct Xmit	Total	Supervisor Xmit	Direct Xmit
Applications (AP)				17	86					25
Today				4	21					6
Approaching				12	56					6
Urgent				1	8					5
Backlog				0	1					8

Reports

[SHOW CRITERIA](#)

Detailed Report - Work Outstanding (Applications-AP) Approaching Date 11/2/2020 - 11/8/2020, SNAP File Date 10/2/2020 - 10/8/2020

[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Pending in WMS			Completed							
	Supervisor Xmit	Direct Xmit	Total	AC	RJ	CL	Dup App	WD	No Change	CC	Total
Applications (AP)	25		135								
Today	6		33								
Approaching	6		34								
Urgent	5		34								
Backlog	8		34								

- Select the **Show Criteria** button to display the screen below.

The screenshot shows a 'Reports' interface with the following elements:

- Report Name:** Work Outstanding
- Task:** Applications (AP)
- Select Retrieve Criteria:**
 - Approaching Date Range: Next Month
 - SNAP File Date From: 10/02/2020
 - SNAP File Date To: 10/08/2020
- Buttons:** HIDE CRITERIA, CLEAR CRITERIA, RETRIEVE REPORT
- Report Title:** Detailed Report - Work Outstanding (Applications-AP)
- Report Filters:** Approaching Date 11/2/2020 - 11/8/2020, SNAP File Date 10/2/2020 - 10/8/2020
- Table Columns:** Task, Potential Work, Open Task, Deferred, ESNAP, RFI, No Def, FTK, E.S. Ready to Assign (Core Docs, Opt Docs, No Docs, Sup Ret, Error Corr)
- Table Data:**

Task	Potential Work	Open Task	Deferred	ESNAP	RFI	No Def	FTK	E.S. Ready to Assign
Applications (AP)	0	8	6	55				
Today	0			17				
Approaching	0	8	6	30				
Urgent	0			7				
Backlog	0			1				

Based on the option selected from the **Task** dropdown, the report will provide the information for the same as seen in above screen. Since AP was selected, information for AP will be displayed within the Task column of the Detailed Report. The report further breaks down AP across data rows consisting of:

- **Today** - Priority Date Today
- **Approaching** - Coming Due with priority Date in selected date range
- **Urgent** - Late, past Priority Date before Task Due Date
- **Backlog** - Overdue, past Task Due Date

The Horizontal Scroll allows the Manager to scroll horizontally. The Manager will be able to Hide (the filter criteria), Clear (the filter criteria), and Retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Manager what filter criteria was specified as seen.
- The Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Manager to Select Columns, Print, and Export the data.

- Selecting Print will generate a PDF file with the on-screen report output. Selected columns will appear in the printed output. The Export option will allow export to Excel.

Attachment D Manager Role
ANGIE Release 1 Notes

- Upon clicking the **Select Columns** button, the Manager will see a modal window to choose the desired columns for the report as seen below. **Save changes** will apply only to the selected columns to the report.

Help Text displayed for the Work Outstanding report within the Detailed Report section:

Task	Potential Work	Open Task	Deferred
Applications (AP)	0	8	6
Today	0		

The Work Outstanding Report shows the number of tasks that are due today, will be due soon, or are past due and shows the number of tasks at each stage of completion. The "Today" row shows tasks due today (the Priority Date is today), the "Approaching" row shows tasks Coming Due (the Priority Date is in the selected date range), the "Urgent" row shows tasks past their Priority Date, and the "Backlog" row shows tasks past their Task Due Date.

It should be noted that the filter for Recertification task uses the case's Interview Month and not the actual Interview Date; when selecting a date range, please use the beginning and end of a complete month.

Regional Manager & Business Administrator Roles

ANGIE Release Notes 1

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1. Document Objective

The objective of this document is to provide context on the screens for Regional Manager and Business Administrator roles within the Activity and General Information Exchange (ANGIE). The layout of the ANGIE dashboard for these roles will allow the logical completion of the activities related to the role and consume the necessary information for the role.

2. Home Page: Dashboard for Regional Manager & Business Administrator

The Regional Manager and Business Administrator dashboard consists of the following collapsible widgets:

- **Your Work Counts!**
- **Team Progress**
- **Work Outstanding**
- **Case Search**
- **Get Next Case for Sign-off**
- **Get Next Case for Processing**

The widgets contain the name/title of the respective widget. Where applicable, at the title level of the widget will also contain the following:

- **Widget Name:** The name of the respective widget will be displayed.
- **Last Updated:** Last updated timestamp on when the data was last updated in the format: Last Updated: mm/dd/yy hh:mm AM/PM
- A refresh button to refresh the data within the widget. Consequently, the last updated timestamp will also be updated.
- A button to Minimize or Maximize the widget.

Attachment E Regional Manager & Business Administrator Roles
 ANGIE Release 1 Notes

The screenshot displays the ANGIE Dashboard with the following sections:

- Your Work Counts!**: A blue header with a red heart icon and the text: "The cases you completed last week helped 3462 eligible families feed their loved ones."
- Team Progress**: A blue header with a refresh icon and "Last Updated: 10/20/2020 12:08 PM". It contains:
 - Staff Overview**: A table with metrics like Total Staff (591), Logged In (463), Unavailable (56), End of Shift (37), and Not Logged in Today (35).
 - HRA Goal**: A section with a trophy icon and a message: "1 Extra Cases per person today would put us on track to eliminate the backlog. It's a team effort. Thank you for doing your part!"
 - Team's Completed Cases**: A list of metrics: Applications (516), Recertifications (555), Case Changes (585), and Document Reviews (495).
 - Need Support?**: A section with a "Policy question?" and an email address: fiscalcenter2@dhs.nyc.gov. It includes links for "Talk to your Supervisor" and "Start a Help Desk Ticket".
- Work Outstanding**: A blue header with a refresh icon and "Last Updated: 10/20/2020 11:50 AM". It features a table:

Task	Potential Work	Open Task	Deferred	ES Ready	Sup Ready	Total Open Work	Xmitted WMS	Pending WMS	Completed
All Tasks	255	98	96	145	107	446	89	377	225
Today	0	12	12	29	16	69	19	82	45
Urgent	0	7	7	14	8	36	30	50	41
Backlog	0	56	56	57	56	225	50	184	90
- Case Search**: A blue header with a dropdown menu labeled "Select Search By Item".
- Get Next Case for Sign-Off**: A blue header with a green button labeled "GET NEXT CASE FOR SIGN-OFF". Below it is the text: "Ready to work on the next case that requires supervisor review? Get started by pressing the button to the right."
- Get Next Case for Processing**: A blue header with a green button labeled "GET NEXT CASE FOR PROCESSING". Below it is the text: "Ready to work on the next case? Get started by pressing the button to the right."

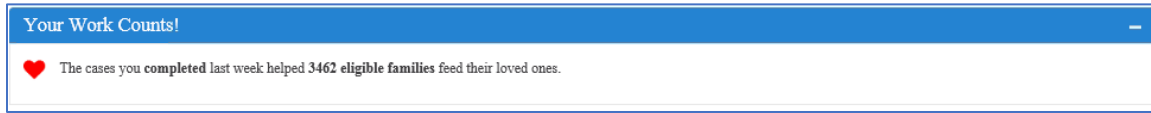
3. "Your Work Counts!" & "Today's Progress" Widgets for Regional Manager & Business Administrator

The **Your Work Counts!** widget provides positive messages for the Regional Manager, with information about how many families their work helped in the previous week (first message as seen below) and positive messages from applicants and participants. The positive messages are from applicants/participants and will be pulled from reviews of the AHRA mobile app in the App Store / Google Play store and also from the AHRA site. The comments will be alternating between these messages. The information displayed within this widget gets updated weekly:

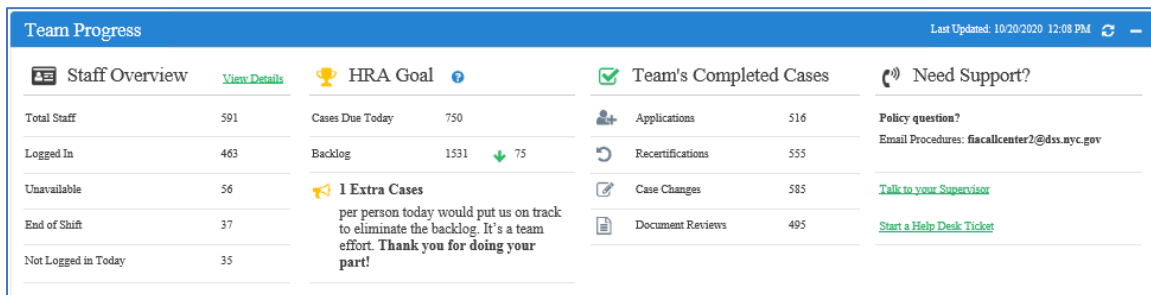
- There will be a table with all possible messages that could be displayed from the sources mentioned. This is a static table that gets refreshed periodically with a new list.
- Each time the Regional Manager logs into ANGIE or returns to ANGIE from Streamlined Paperless Office System (SPOS), either the "The cases you

Attachment E Regional Manager & Business Administrator Roles
 ANGIE Release 1 Notes

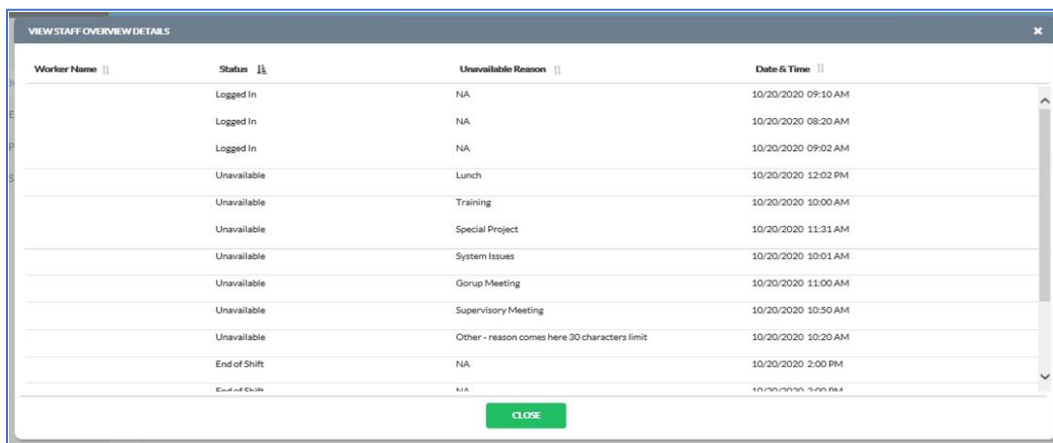
completed last week helped X eligible families feed their loved ones.” or that day’s HRA message will be displayed. Selection will be random.



The Team progress widget for the Regional Manager consists of four sections including **Staff Overview**, **HRA Goal**, **Team’s Completed Cases**, and **Need Support?** This widget keeps track of the Regional Manager’s Team progress throughout the day.



The **Staff Overview** section provides information to the Regional Manager on their **Total Staff**, **Logged In**, **Unavailable**, **End of Shift**, and **Not logged in Today**. The Regional Manager can get more details in terms of the Worker Name, Status, Unavailable Reason, and Date & Time by selecting the **View Details** link located in this section as seen above, which opens the **Details** screen below.



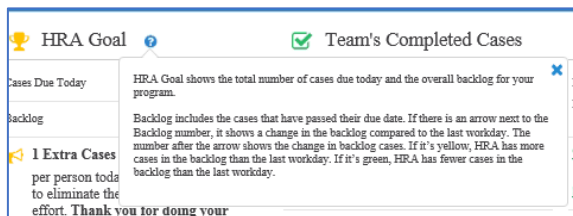
The **HRA Goal** section provides information to the Regional Manager on the **Cases Due Today** and **Backlog**:

- **Cases Due Today** displays all tasks with a Priority Date of Today.
- **Backlog** is displayed as the sum of tasks that are late and overdue.

Attachment E Regional Manager & Business Administrator Roles
ANGIE Release 1 Notes

- Next to the backlog number, an arrow up (displayed in yellow) shows an increase in cases in the backlog since yesterday,
- Arrow down (displayed in green) for a decrease in the backlog since yesterday,
- No arrow at all (just the backlog number) for no increase or decrease in the backlog number. Where there are zero cases in the backlog for more than one day, the number of days that the backlog has been zero will be counted.
 - This backlog comparison is comparing the start of day backlog number from yesterday to the start of day backlog number from today.
 - The backlog comparison will be calculated at 5:30am each day.
 - The backlog counts and comparisons will compare the current workday (business day) against the prior workday (business day). These numbers are not updated on weekends and holidays.
- Below the **Cases Due Today** and **Backlog**, there will be text that switches between the following two messages based on the direction of the backlog change:
 - If backlog is increasing (arrow pointing up) the text will read: “2 extra cases per person today would put us on track to eliminate the backlog. It’s a team effort. Thank you for doing your part!” the text will be preceded by an exclamation mark in a yellow triangle.
 - If backlog is decreasing (arrow pointing down) the text will read: “1 extra case per person today would put us on track to eliminate the backlog. It’s a team effort. Thank you for doing your part!” the text will be preceded by a yellow blowhorn icon.
- Where there is no backlog for more than 1 day, text will be displayed as follows: “Don’t lose our record! It’s been X days with no backlog. If everyone meets their goal for today, we can keep the backlog at zero!” the text should be preceded by a green thumbs up icon.

Help Text displayed for HRA Goal:



The **Team’s Completed Cases** section displays the number of Applications, Recertifications, Case Changes, and Document Reviews the Regional Manager’s team completed for that day up to the point in which the timestamp is shown in the banner.

The **Need Support?** section provides the email for the Office of Procedures Call Center (fiacallcenter2@dss.nyc.gov) as read-only. Clicking on **Talk to your Supervisor** opens **Microsoft Teams**. Clicking on **Start a Help Desk Ticket** opens the **Self-Service Incident Form** and allows the staff to report any technical issue they may encounter in ANGIE.

4. Work Outstanding Widget in the Regional Manager & Business Administrator Dashboard

The **Work Outstanding** widget shows the ANGIE work that is outstanding by criticality so that the Regional Manager can review what remains ahead and what was completed. The data shown in the dashboard includes **All Tasks** consisting of rows for **Today** (Priority Date Today), **Urgent** (Late, past Priority Date before/including Task Due Date), and **Backlog** (Overdue, past Task Due Date). The data is split across columns for Potential Work, Open Task, Deferred, ES Ready, Sup Ready, Total Open Work, Xmitted WMS, Pending WMS, and Completed.

Task	Potential Work	Open Task	Deferred	ES Ready	Sup Ready	Total Open Work	Xmitted WMS	Pending WMS	Completed
All Tasks	255	98	96	145	107	446	89	377	225
Today	0	12	12	29	16	69	19	82	45
Urgent	0	7	7	14	8	36	30	50	41
Backlog	0	56	56	57	56	225	50	184	90

Help Text for the Work Outstanding:

Work Outstanding shows the number of tasks that are due today, will be due soon, or are past due and shows the number of tasks at each stage of completion. The "Today" row shows tasks due today (Priority Date is today), the "Urgent" row shows tasks past their Priority Date, and the "Backlog" row shows tasks past their Task Due Date.

5. Case Search: Manual Assignment of Tasks

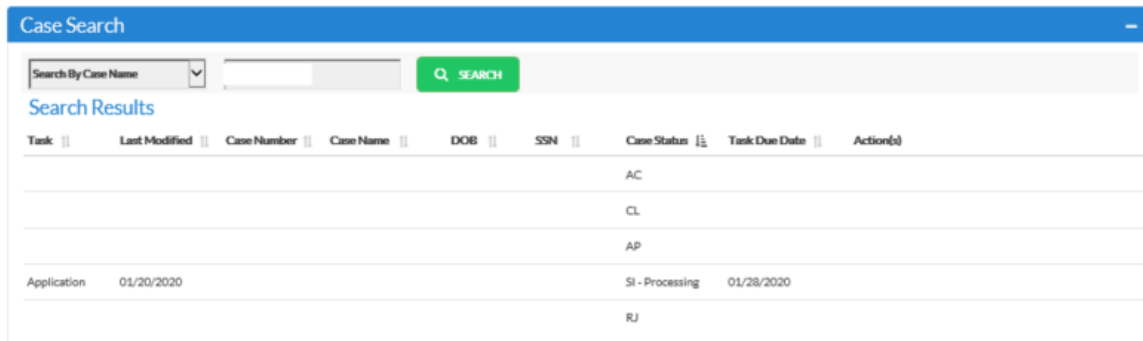
To manually assign a task, the Regional Manager must first search for the respective case. The Regional Manager can execute a search based on the following criteria:

- Case Number
- SSN
- Case Name
- CIN
- AHRA Confirmation #
- IVRS #

Attachment E Regional Manager & Business Administrator Roles
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Based on the criteria selected from the dropdown, the Regional Manager will be required to enter the corresponding information. Upon selecting the **Search** button, the system will display the search results consisting of Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status, Task Due Date and Action(s).



Selecting the desired row will highlight that row. Once the desired row is selected, the Regional Manager can select from available options from the Action(s) dropdown and select **Go** to execute. The options available within the Action(s) dropdown are dependent on the **Case Status** of the Search result. The search process can result in the following three outcomes:

(1) **Open Task**

- Cases with **open task** will have information in **Task** and **Last Modified** columns of **Search Results** section
- If the system finds a case with **open task**, it will display this case first in the **Search Results** section
- If the system finds multiple cases with **open tasks**, it will display these cases first and sorted by earlier date in the **Task Due Date** column

(2) **Latest Task**

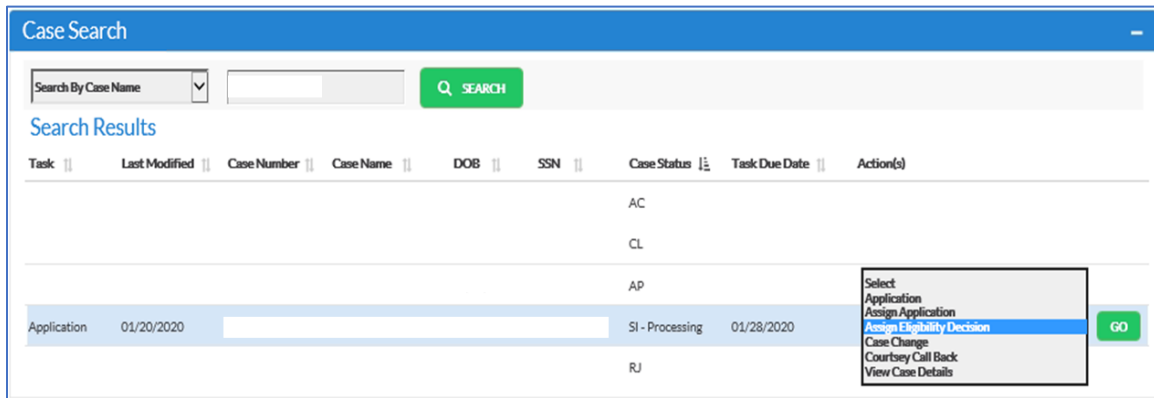
- If the system does not return any cases with **open tasks** in the **Search Results** section, the system will initially sort the found cases by **Case Number** column in **Ascending** order.
- Cases without open task are those where there is no information in **Task** and **Last Modified** columns of **Search Results** section

(3) **No Task**

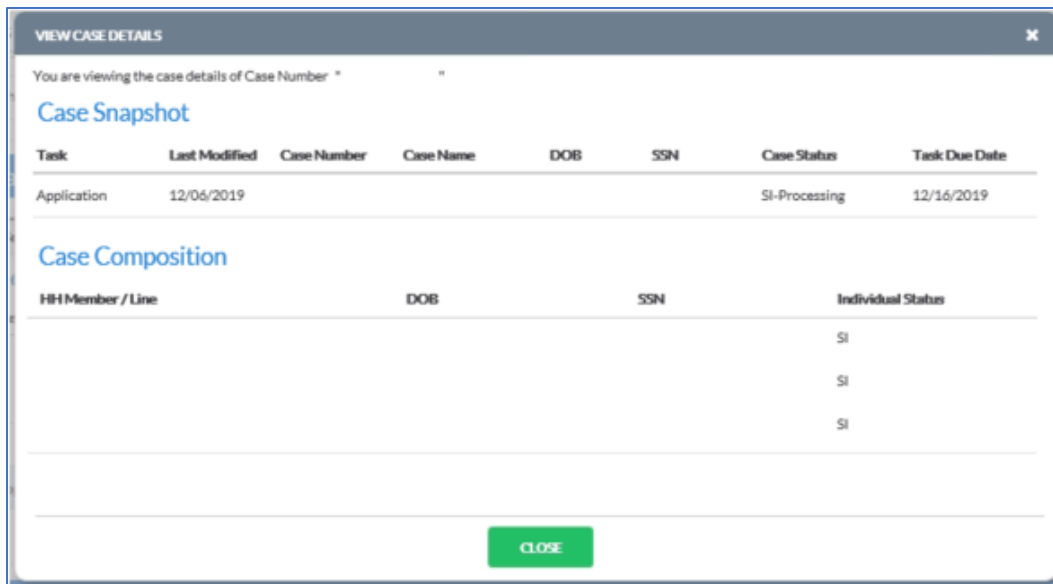
- The system displays the message “No Case found, please refine your search criteria.”

Search Results Actions(s) Combo Box will contain a list of available actions for the Regional Manager. These actions will be table-driven. These tables allow control at the following levels:

- Role of Regional Manager (there are many titles within 1 role) - SPOS roles will be leveraged to maintain compatibility with POS queues.
- Center designation of Regional Manager.
- Current WMS case status of selected case in search results.
- List of activities available for the case, based on the case status and open task.



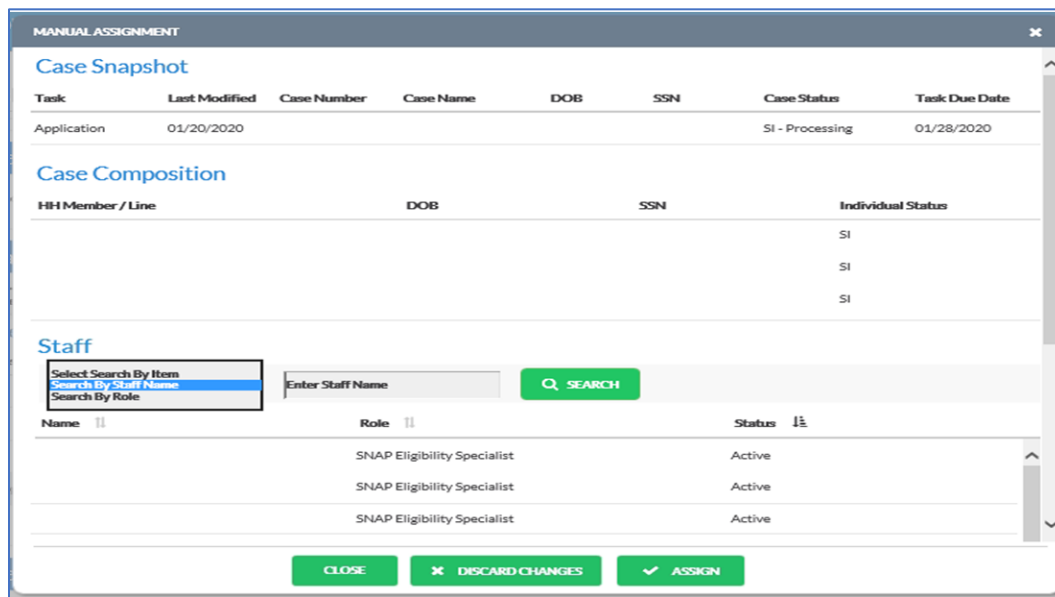
Selecting the **View Case Details** option from Action(s) and **Go** will result in a modal window with the case profile, consisting of the **Case Snapshot** and **Case Composition**. The columns for the Case Snapshot section consist of **Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status,** and **Task Due Date**. The columns for the Case Composition section consist of **HH Member/Line, DOB, SSN,** and **Individual Status**.



The Regional Manager can manually assign tasks by searching for the case and then selecting the **Assign** option from the Actions dropdown. Clicking the **Go** button results in a modal window displaying the **Case Snapshot**, **Case Composition**, along with the **Staff** section as seen below.

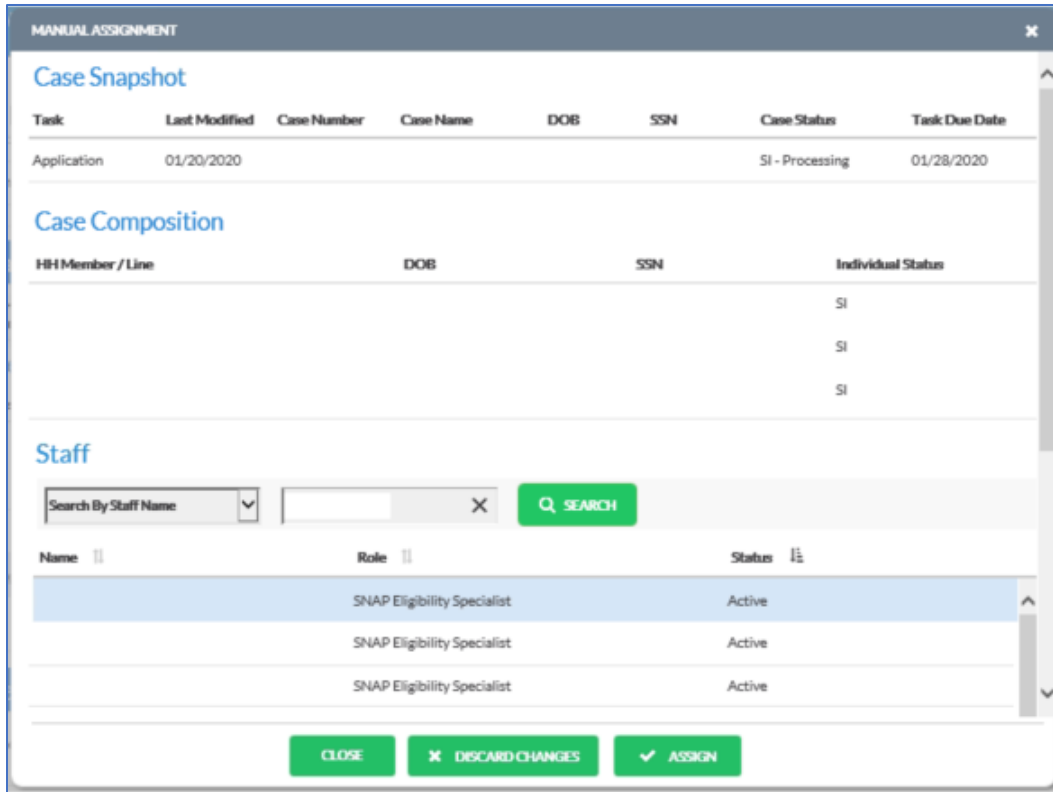
The columns for the Case Snapshot section consist of **Task**, **Last Modified**, **Case Number**, **Case Name**, **DOB**, **SSN**, **Case Status**, and **Task Due Date**.

The columns for the Case Composition section consist of **HH Member/Line**, **DOB**, **SSN**, and **Individual Status**. Within the Staff section, the Regional Manager can search for the Staff based on **Staff Name** or **Role** and then select the intended staff within the grid. If Name is selected, then the Regional Manager must enter the name as seen below. If Role is selected, the Regional Manager must select an option from the Role dropdown consisting of **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, or **Clerical Associate**. Selecting the **Search** button will display the search results in the grid. The sortable columns displayed in the Staff section include **Name**, **Role**, and **Status**.

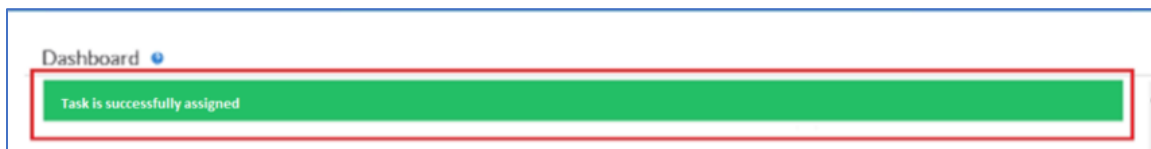


Once a row is selected for the intended staff, it will highlight that row and selecting the **Assign** button will assign the task to that staff.

Attachment E Regional Manager & Business Administrator Roles
ANGIE Release 1 Notes

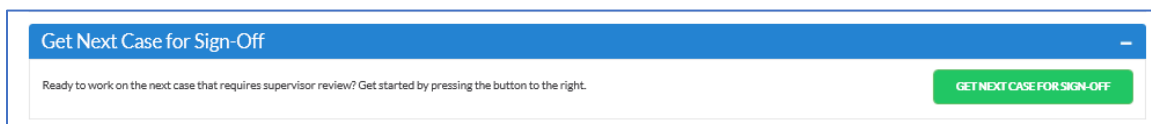


The Regional Manager will see a green banner to inform them that the task has been successfully assigned.



6. Get Next Case for Sign-off: Next Approval Task for Regional Manager & Business Administrator

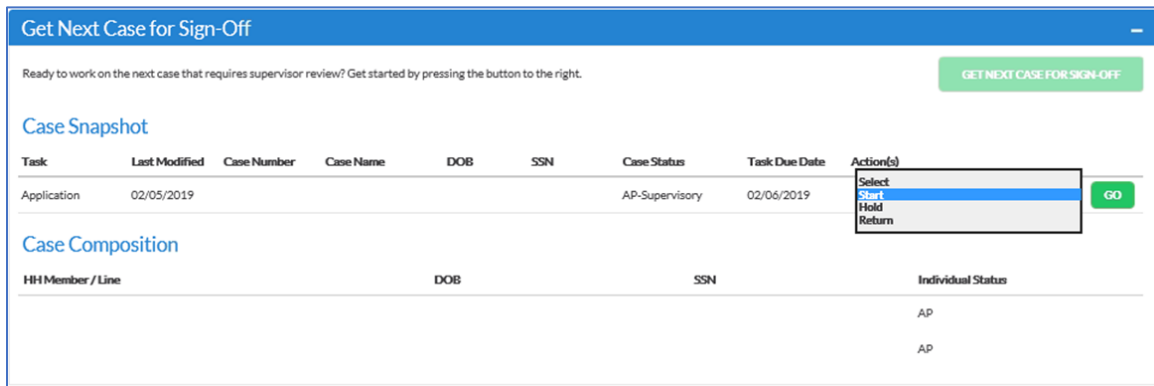
The Regional Manager will get the next task to approve by selecting the **Get Next Case for Sign-off** button located within the dashboard. The approval tasks that are distributed to the Regional Manager will be based on the priority logic.



Once the button is clicked, the Regional Manager will see a case profile consisting of **Case Snapshot** and **Case Composition**. The columns for the Case Snapshot section consist of **Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status, Task Due Date, and Action(s)**. The columns for the Case

Composition section consist of **HH Member/Line, DOB, SSN, and Individual Status.**

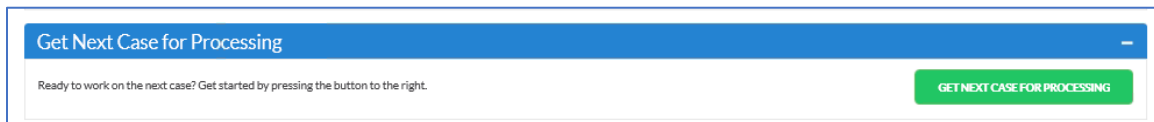
The Regional Manager will be able to start the Approval task by selecting the **Start** option within the Action(s) dropdown, and then selecting the **GO** button. The ANGIE system will then launch the Streamlined POS (SPOS) application for the Regional Manager to approve the respective task.



7. Get Next Case for Processing for Regional Manager

The Regional Manager can step down to the role of the Eligibility Specialist and function as an Eligibility Specialist. The tasks that are dished out to Regional Managers within this widget, are non-approval tasks. This function will allow the Regional Manager to help the Eligibility Specialists perform their tasks when additional manpower is needed.

By selecting the **Get Next Case for Processing** button located within the dashboard a non-approval task based on the priority logic will be distributed to the Regional Manager.



- Once the button is clicked, the Regional Manager will see a case profile consisting of **Case Snapshot** and **Case Composition** as seen below. The columns for the Case Snapshot section consist of **Task, Last Modified, Case Number, Case Name, DOB, SSN, Case Status, Task Due Date, and Action(s).** The columns for the Case Composition section consist of **HH Member/Line, DOB, SSN, and Individual Status.**
- The Regional Manager will be able to start the task by selecting the **Start** option within the Action(s) dropdown, and then selecting the **GO** button. The ANGIE system will then launch the SPOS application for the Regional Manager to work on the respective task.

Attachment E Regional Manager & Business Administrator Roles ANGIE Release 1 Notes

Task	Last Modified	Case Number	Case Name	DOB	SSN	Case Status	Task Due Date	Action(s)
Application	02/05/2019					AP-Processing	02/06/2019	Select Start Hold Return

HH Member / Line	DOB	SSN	Individual Status
			AP
			AP

8. Hold or Return Task

The Regional Manager can execute a **Hold** or **Return** on a task and is applicable to both the **Get Next Case for Processing** and **Get Next Case for Sign-Off** widgets.

- The Regional Manager can execute a hold on a task by selecting the **Hold** option from the Action(s) dropdown and clicking the **Go** button. The Regional Manager will see a modal window and must select from the available Hold Reasons (**Restroom, Break, Lunch**).

Once the Regional Manager selects the applicable hold reason and then selects **Save Changes**, the hold will be applied on the respective task for a set time (2 hours), for that Regional Manager. Note that the Regional Manager cannot work on another “prioritized task” until the hold task is worked.

If the Regional Manager returns within the set time, the Regional Manager will be provided with the same task upon selecting the **Get Next Case for Processing** button. If the hold time lapses, then the task will be placed back in the general pool and another Regional Manager may have access to that task.

HOLD

Hold Reasons

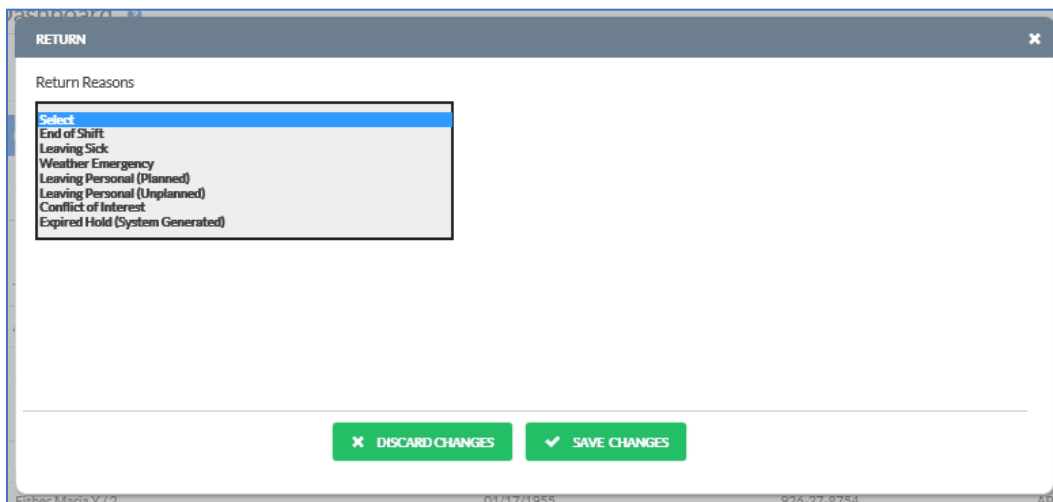
Select
Restroom
Break
Lunch

DISCARD CHANGES SAVE CHANGES

- The Regional Manager can return a task by selecting the **Return** option from the Action(s) dropdown and clicking the **Go** button.

The Regional Manager will see a modal window and required to select from the available Return Reasons (**End of Shift**, **Leaving Sick**, **Weather Emergency**, **Leaving Personal (Planned)**, **Leaving Personal (Unplanned)**, **Conflict of Interest**, **Expired Hold (System Generated)**).

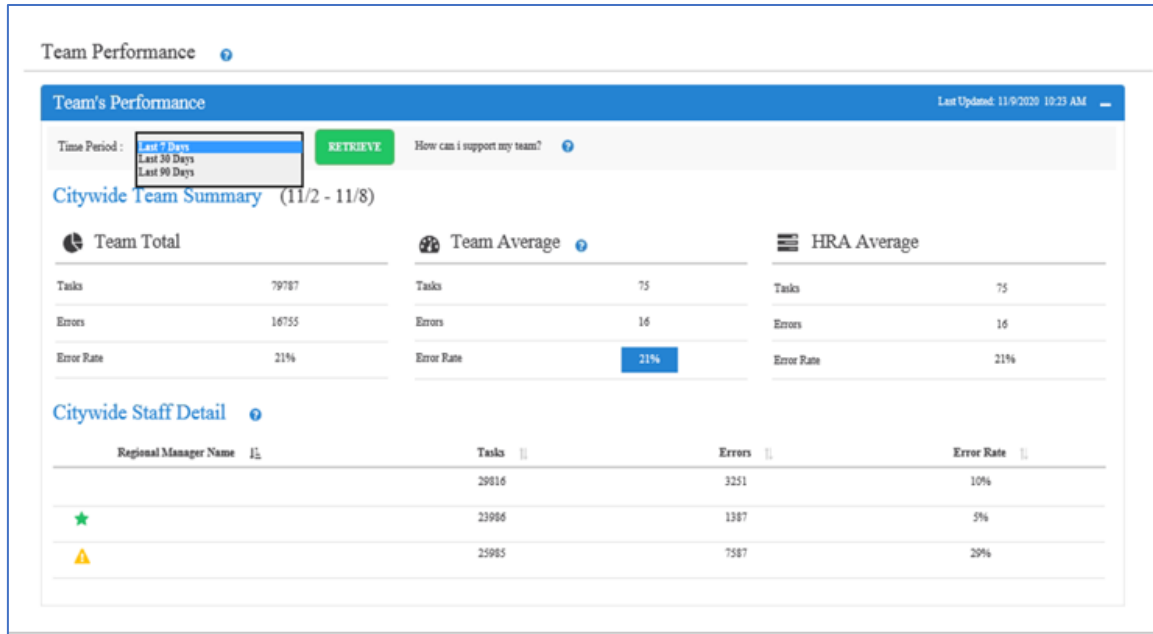
- After selecting the applicable return reason and clicking the **Save Changes** button, the task will be returned to the general pool and another Regional Manager can get the task.



9. Team Performance Page for Regional Manager & Business Administrator

The Regional Manager can access their **Team Performance** page from the left navigation pane. This page will provide metrics to gauge the team's performance and allow the Regional Manager to drill-down from the Citywide view (default) to Regional Manager view, Manager view, Supervisor view, and finally to the Eligibility Specialist view.

- The Regional Manager must select the timeframe for the report to generate and can choose from **Last 7 Days**, **Last 30 Days**, or **Last 90 Days**.
- Once the desired timeframe is selected, selecting the **Retrieve** button will display the corresponding results.



The Regional Manager will start with the **Citywide View** as the default view on this page as seen above. This page consists of **Citywide Team Summary** and **Citywide Staff Detail** sections.

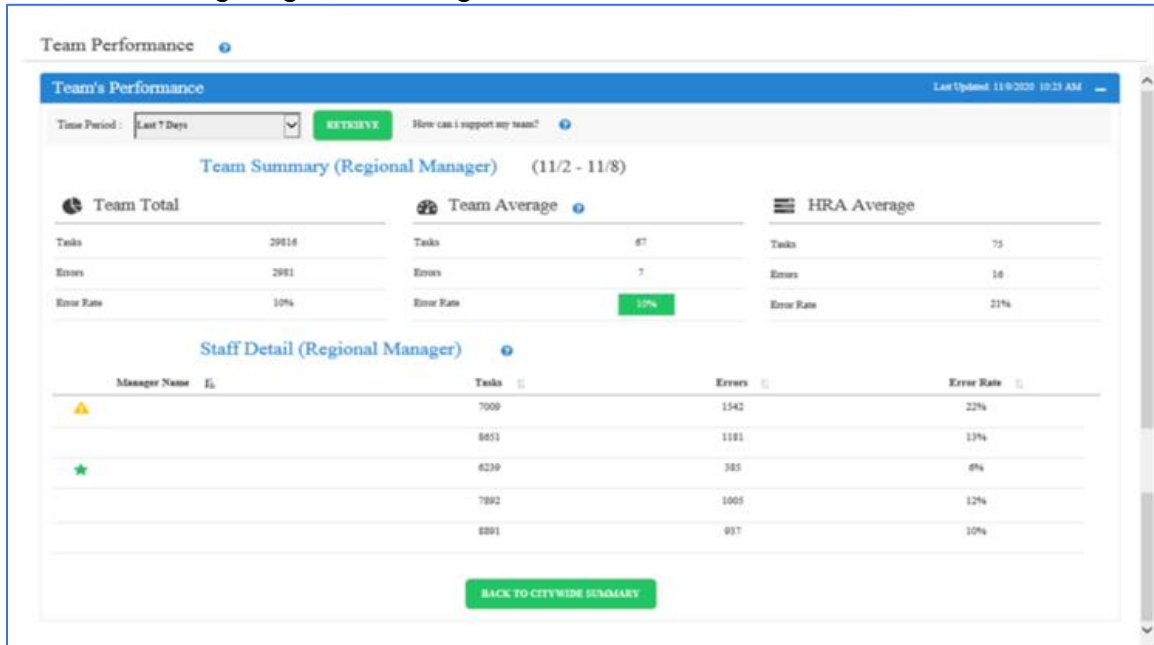
The **Citywide Team Summary** section of the page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, and **Error Rate** as a percentage. The Error Rate for the Team Average table will be displayed within green, yellow, or blue boxes to indicate if the team's WMS Error Rate is above, below, or same as the HRA Average, respectively.

The **Citywide Staff Detail** section contains columns **Regional Manager Name**, **Tasks**, **Errors**, and **Error Rate**. To the left of the Regional Manager Name column shows icons to represent the following:

- **Yellow Warning icon** shows performance in the 15th percentile or below.
- **Green Star icon** shows performance in the 85th percentile or above.

Selecting the name within the **Regional Manager Name** column in the Citywide view will give access to the selected Regional Manager view as seen below. Consequently, depending on the name selected for drill-down, the Team Summary values on top changes to show the selected Regional Manager's Team Summary. Also, the Staff Details section on the bottom of the page changes to show the selected Regional Manager's Staff Detail as seen in the screen below.

Screen showing Regional Manager View for Team Performance:



The Regional Manager view contains the name of the selected Regional Manager in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the Team performance page of the selected Regional Manager.

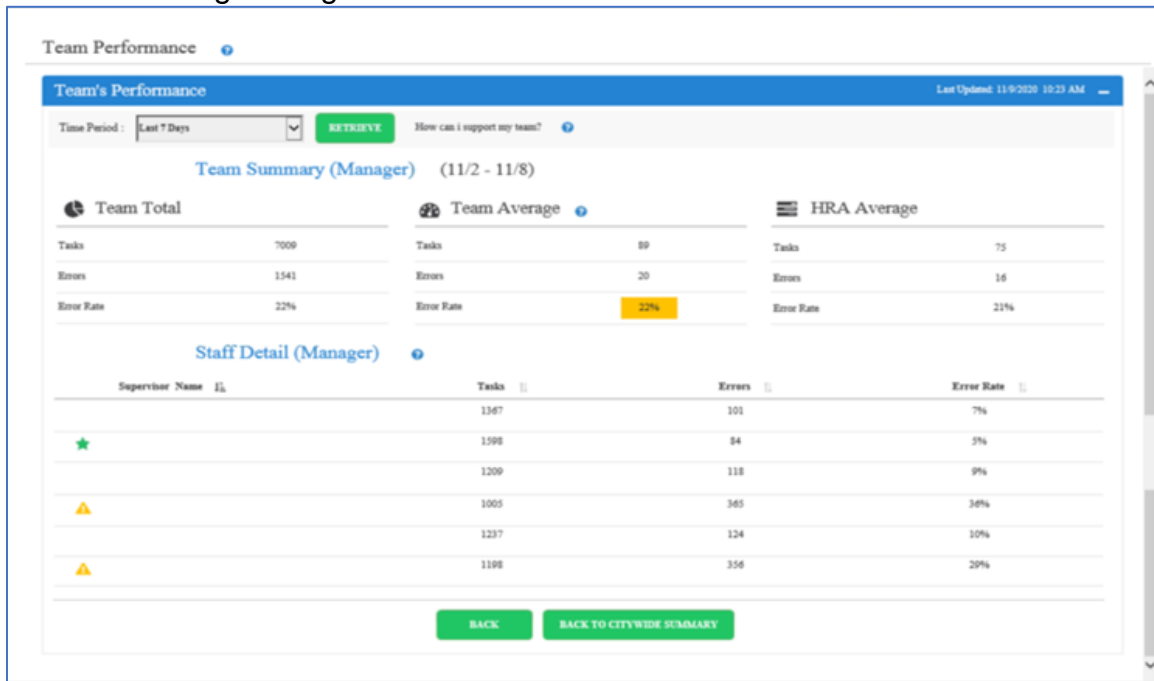
The **Team Summary** section of this page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, and **Error Rate** as a percentage. The Error Rate for the Team Average table will be displayed within green, yellow or blue boxes to indicate if the selected Regional Manager's team's WMS Error Rate is above, below, or same as the HRA Average respectively.

The **Staff Detail** section contains columns for **Manager Name**, **Tasks**, **Errors**, and **Error Rate**. To the left of the Manager Name column shows icons to represent the following:

- **Yellow Warning icon** shows performance in the 15th percentile or below.
- **Green Star icon** shows performance in the 85th percentile or above.

From the Regional Manager view (above screen), the Regional Manager can access the **Manager view** by selecting the name within the **Manager Name** column. Consequently, depending on the name selected for drill-down, the Team Summary values on top of the page changes to show the selected Manager's Team Summary as seen below. Also, the Staff Details section on the bottom of the page changes to show the selected Manager's Staff Detail as seen in the screen below. Selecting **Back to Citywide Summary** will navigate the Regional Manager to the default Citywide view.

Screen showing Manager View for Team Performance:



The Manager view will contain the name of the selected Manager in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the Team performance page of the selected Manager.

The **Team Summary** section of this page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, and **Error Rate** as a percentage. The Error Rate for the Team Average table will be displayed within green, yellow, or blue boxes to indicate if the selected Manager's team's WMS Error Rate is above, below, or same as the HRA Average, respectively.

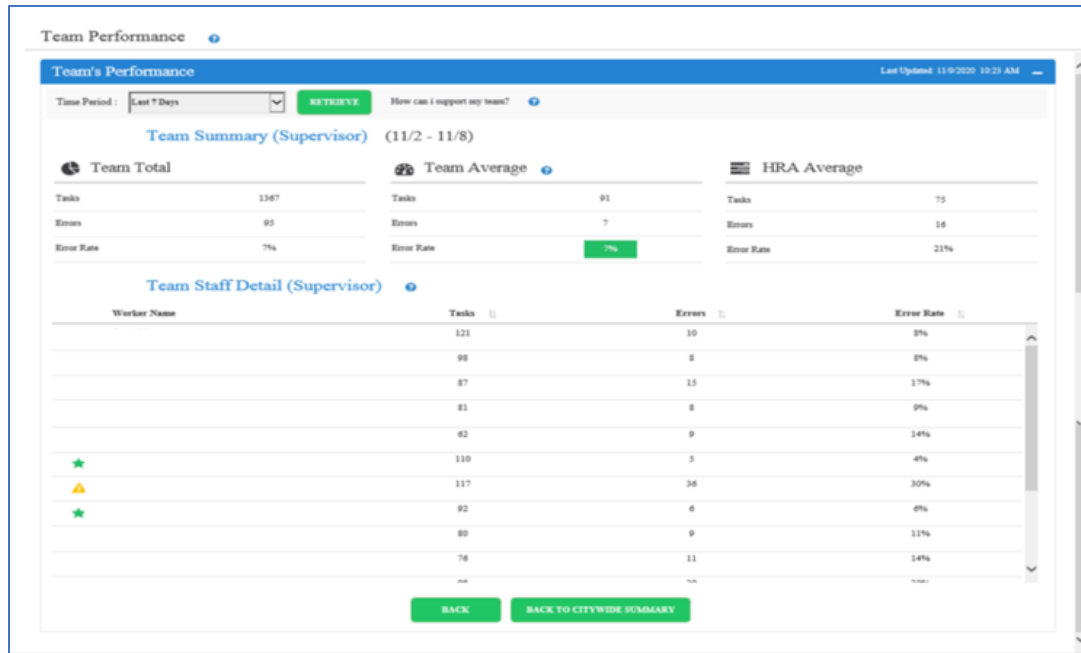
The **Staff Detail** section contains columns for **Supervisor Name**, **Tasks**, **Errors**, and **Error Rate**. To the left of the Supervisor Name column shows icons to represent the following:

- **Yellow Warning icon** shows performance in the 15th percentile or below.
- **Green Star icon** shows performance in the 85th percentile or above.

From the Manager view (above screen), the Regional Manager can access the **Supervisor view** by selecting the name within the **Supervisor Name** column. Consequently, depending on the name selected for drill-down, the Team Summary values on top of the page changes to show the selected Supervisor's Team Summary as seen below. Also, the Staff Details section on the bottom of the page changes to show the selected Supervisor's Staff Details as seen below. Selecting **Back** will navigate the Regional Manager to the previous page (Regional Manager

View). Selecting **Back to Citywide Summary** will Navigate the Regional Manager to the default Citywide View.

Screen showing Supervisor View for Team Performance:



The Supervisor view will contain the name of the selected Supervisor in both the **Team Summary** and **Staff Detail** sections of the page as seen above. This page displays the Team performance page of the selected Supervisor.

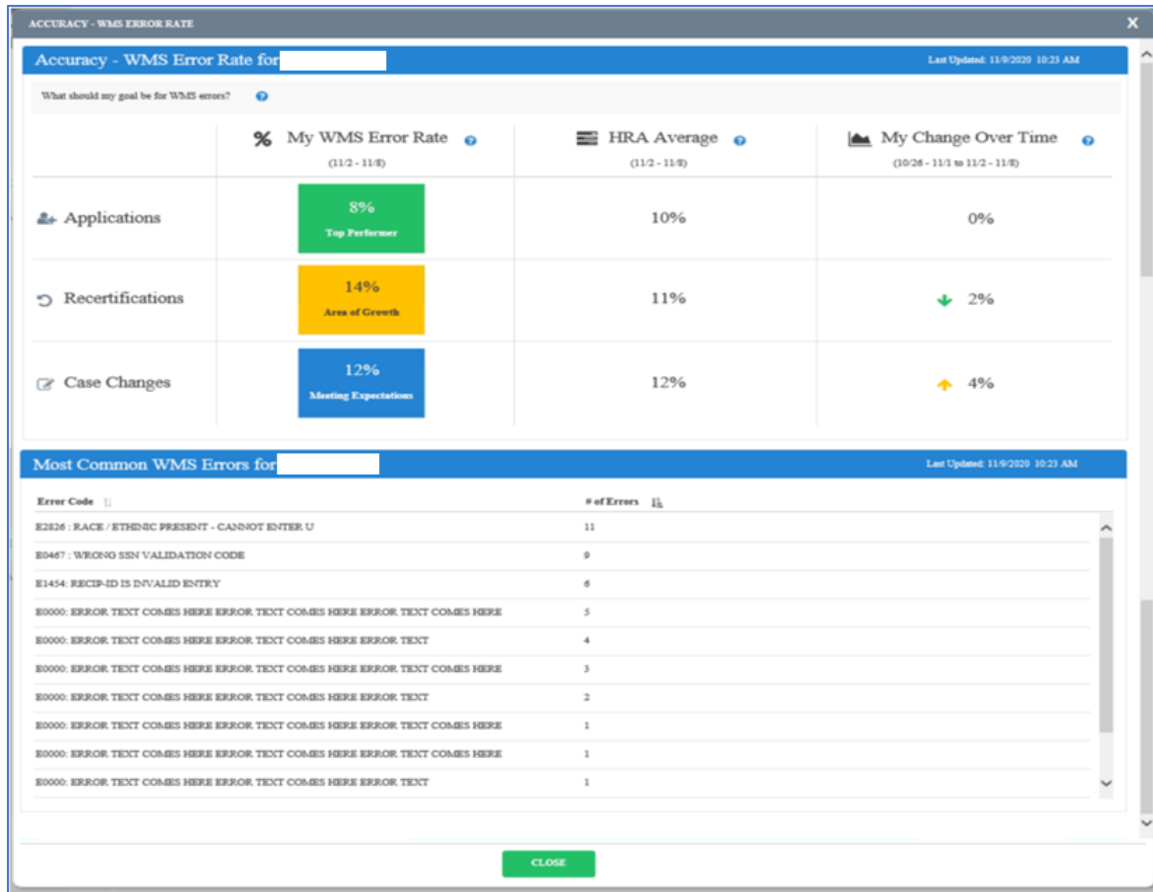
The **Team Summary** section of this page contains three tables consisting of **Team Total**, **Team Average**, and **HRA Average**. Each table provides the number of **Tasks**, number of **Errors**, and **Error Rate** as a percentage. The Error Rate for the Team Average table will be displayed within green, yellow, or blue boxes to indicate if the selected Supervisor's team's WMS Error Rate is above, below, or same as the HRA Average, respectively.

The **Staff Detail** section contains columns for **Worker Name**, **Tasks**, **Errors**, and **Error Rate**. To the left of the Worker Name column shows icons to represent the following:

- **Yellow Warning icon** shows performance in the 15th percentile or below.
- **Green Star icon** shows performance in the 85th percentile or above.
- From the Supervisor view (above screen), the Regional Manager can access the **Eligibility Specialist view** by selecting the **Errors** and **Error Rate** values for the respective Eligibility Specialist. Consequently, the Regional Manager will be able to view the Performance page of the selected Eligibility Specialist as seen below.

- Selecting **Back** will Navigate the Regional Manager to the previous page (Manager View).
- Selecting **Back to Citywide Summary** will Navigate the Regional Manager to the default Citywide View.

Screen showing Eligibility Specialist's Performance page:



The Eligibility Specialist view will contain the name of the selected Eligibility Specialist on the widgets **Accuracy – WMS Error Rate** and **Most Common WMS Errors**.

The **Accuracy - WMS Error Rate** widget provides Error Rates on the **Applications**, **Recertifications**, and **Case Changes** worked on by the Eligibility Specialist for the set timeframe. The table provides Error Rates on the **Applications**, **Recertifications**, and **Case Changes** worked on by the Eligibility Specialist for the set timeframe. It provides information on the selected Eligibility Specialist's performance in terms of their own Error Rate (displayed within **My WMS Error Rate**), HRA Average Error Rate (displayed within **HRA Average**), and keeps track of the Eligibility Specialist's current Error Rate over the previous period (displayed within **My Change Over Time**).

My WMS Error Rate column:

- At the header level, the actual dates for the timeframe selected are displayed below the **My WMS Error Rate** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- WMS Error Rate **Calculation**: Numerator = number of errors made on that type of task. Denominator = total number of that type of task submitted to WMS.
 - Both the numerator and the dominator must occur within the timeframe in order to be part of the WMS Error Rate Calculation.
 - The WMS Error Rate is displayed as a percentage.
 - If the Eligibility Specialist did not perform any tasks (0 tasks) for the selected time period (e.g. The Eligibility Specialist did not do any Case Changes in the Last 7 Days (selected period), and only worked on Applications and Recertifications), **N/A** will displayed across the Case Changes row. In this example, Applications and Recertifications will have Error Rates across the rows.
- Depending on the WMS Error rate comparison to the HRA Average, the following depictions are used:
 - If the Eligibility Specialist's Error Rate for the selected period is less than the HRA Average, the header will read **Top Performer** colored in a green color block.
 - If the Eligibility Specialist's Error Rate for the selected period is the same as the HRA Average the header will read **Meeting Expectations** colored in blue color block.
 - If the Eligibility Specialist's Error Rate for the selected period is greater than the HRA Average, the header shall read **Area for Growth** colored in yellow color block.

HRA Average column:

- At the header level, the actual dates for the selected time period are displayed below the **HRA Average** column in the following format: [current time frame in the following date format: mm/dd – mm/dd]
- Shows the average WMS Error Rate for all other Eligibility Specialists for the selected time across each Task Type (Applications, Recertifications, and Case Changes)

My Change over Time column:

- At the header level, the actual dates for the previous time period are displayed below the **My Change Over Time** column in the following format: [previous timeframe to current timeframe in the following date format: mm/dd – mm/dd to mm/dd - mm/dd]
- If this period's Error Rate is below that of the last period, there will be a green arrow pointing downwards, followed by the change in percent.

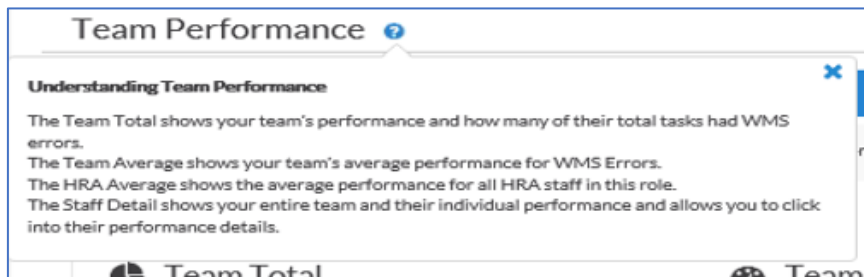
Attachment E Regional Manager & Business Administrator Roles
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- If this week's Error Rate is the same from the last week, it should only display "0%".
- If this week's Error Rate is above that from the last week, there will be a yellow arrow pointing upwards, followed by the change in percent.

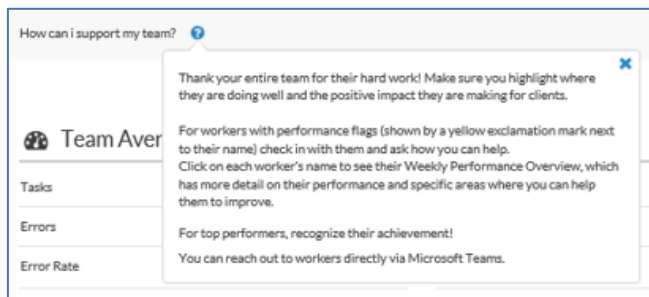
My Most Common WMS Errors widget has a summary table of the selected Eligibility Specialist's most common errors based on the selected timeframe. The table consists of two columns. The **Error Code** column shows the name of the WMS Error(s). The **# of Errors** column shows the count of the number of corresponding WMS Errors. Both columns are sortable.

- Selecting **Close** will return Regional Manager to the Supervisor view.

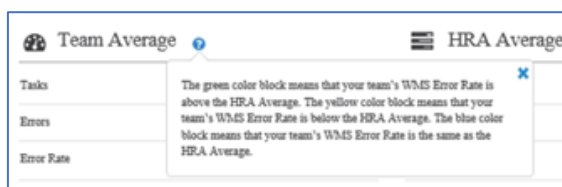
Team Performance - Help Text:



How can I support my team? - Help Text:

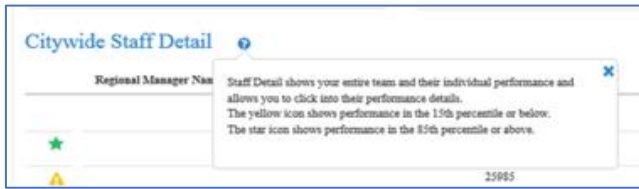


Team Average - Help Text:

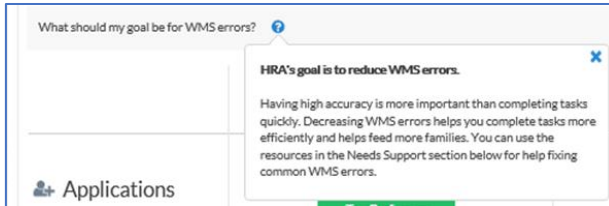


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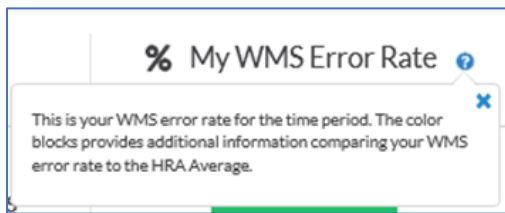
Staff Detail - Help Text:



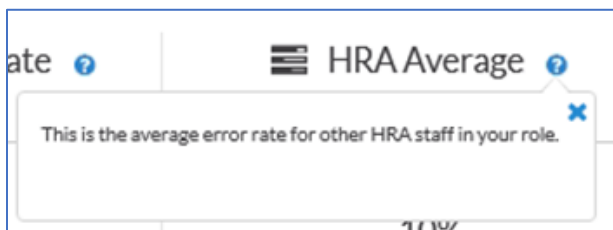
What should my goal be for WMS errors? - Help Text:



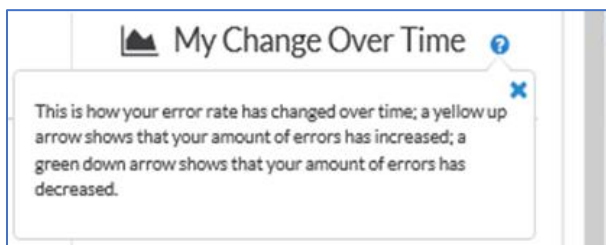
My WMS Error Rate – Help Text:



HRA Average – Help Text:



My Change Over Time – Help Text:



10. Team's Daily Activity for Regional Manager & Business Administrator

The **Team's Daily Activity** page can be accessed by the Regional Manager from the left navigation pane. This page starts with the **Citywide view** for the Regional Manager and consists of **Activity Summary – Citywide** and **Activity Detail – Citywide** widgets as seen below.

The screenshot displays the 'Team's Daily Activity' page. The top widget, 'Activity Summary - Citywide', is updated as of 10/20/2020 10:23 AM and contains three sub-tables: 'Staff Overview', 'Tasks Status', and 'Tasks Completed'. The 'Staff Overview' table lists staff counts for Total Staff (369), Logged In (225), Unavailable (49), End of Shift (47), and Not Logged in Today (48). The 'Tasks Status' table shows counts for Initiated (8784), In Progress (231), Incomplete (1531), and Complete (7022). The 'Tasks Completed' table lists counts for Interviews (1202), Applications (1462), Recertifications (1419), Case Changes (1169), and Document Reviews (1770). A 'View Details' link is present next to the Staff Overview table. The bottom widget, 'Activity Detail - Citywide', is also updated as of 10/20/2020 10:23 AM and is a table with columns for Regional Manager Name, Tasks In Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, and Document Reviews. It lists three regional managers and a total row.

Regional Manager Name	Tasks In Progress	Tasks Incomplete	Tasks Complete	Interview	Application	Recertification	Case Change	Document Reviews
	75	627	2682	401	516	555	585	495
	89	503	2302	429	447	519	379	528
	67	401	2168	372	499	345	205	747
Total	231	1531	7022	1202	1462	1419	1169	1770

The **Activity Summary – Citywide** widget consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**. The **Staff Overview** table provides an inventory of the Total Staff, Logged In, Unavailable, End of Shift, and Not Logged in Today. The **Tasks Status** table provides information on the number of tasks that are Initiated, In Progress, Incomplete, and Complete. The **Tasks Completed** table provides the number of tasks that are completed for Interviews, Applications, Recertifications, Case Change, and Document Reviews.

A **View Details** link is provided within the Staff Overview table that will provide details of staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**. Upon selection of the link a modal window consisting of columns for **Worker Name**, **Status**, **Unavailable Reason**, and **Date & Time** will display as seen below. Selecting **Close** will return the Regional Manager to the default Citywide view of the Team's Daily Activity page.

Attachment E Regional Manager & Business Administrator Roles
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Worker Name	Status	Unavailable Reason	Date & Time
	Logged In	NA	10/20/2020 09:10 AM
	Logged In	NA	10/20/2020 08:20 AM
	Logged In	NA	10/20/2020 09:02 AM
	Unavailable	Lunch	10/20/2020 12:02 PM
	Unavailable	Training	10/20/2020 10:00 AM
	Unavailable	Special Project	10/20/2020 11:31 AM
	Unavailable	System Issues	10/20/2020 10:01 AM
	Unavailable	Gorup Meeting	10/20/2020 11:00 AM
	Unavailable	Supervisory Meeting	10/20/2020 10:50 AM
	Unavailable	Other - reason comes here 30 characters limit	10/20/2020 10:20 AM
	End of Shift	NA	10/20/2020 2:00 PM
	End of Shift	NA	10/20/2020 2:00 PM

The default view of **Activity Detail – Citywide** widget shows columns for Regional Manager Name, Tasks in Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, Document and Reviews. The **Regional Manager Name** column are links and upon selection, the Regional Manager can view the selected Regional Manager’s Team’s Daily Activity page as seen below.

Team's Daily Activity

Activity Summary for [Redacted] Team (Regional Manager) Last Updated: 10/20/2020 10:23 AM

Staff Overview		Tasks Status		Tasks Completed	
Total Staff	591	Initiated	3630	Interviews	482
Logged In	463	In Progress	470	Applications	516
Unavailable	56	Incomplete	627	Recertifications	555
End of Shift	37	Complete	2533	Case Changes	585
Not Logged in Today	35			Document Reviews	495

Activity Detail for [Redacted] Team (Regional Manager) Last Updated: 10/20/2020 10:23 AM

Manager Name	Tasks In Progress	Tasks Incomplete	Tasks Complete	Interview	Application	Recertification	Case Change	Document Reviews
[Redacted]	98	165	448	71	109	79	82	107
[Redacted]	95	132	630	79	89	114	123	125
[Redacted]	88	104	638	113	101	123	103	98
[Redacted]	118	137	646	87	123	115	134	87
[Redacted]	79	89	471	132	94	124	143	78
Total	470	627	2533	482	516	555	585	495

In the Regional Manager view (above screen), the selected Regional Manager’s name is displayed on the **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected Regional Manager’s Team’s Daily Activity.

The **Activity Summary** widget for the selected Regional Manager consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**. The **Staff Overview** table provides an inventory of the Total Staff, Logged In, Unavailable, End of Shift, and

Not Logged in Today. The **Tasks Status** table provides information on the number of tasks that are Initiated, In Progress, Incomplete, and Complete. The **Tasks Completed** table provide the number of tasks that are completed for Interviews, Applications, Recertifications, Case Changes, and Document Reviews.

A **View Details** link is provided within the Staff Overview table that provides details of the Regional Manager’s staff who are **Logged In, Unavailable, End of Shift, and Not Logged in Today**. Upon selection of the link will display a modal window consisting of columns for **Worker Name, Status, Unavailable Reason, and Date & Time**.

The **Activity Detail** widget for the selected Regional Manager shows columns for Manager Name, Tasks in Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, and Document Reviews. The **Manager Name** column are links and upon selection, Manager can drilldown to the selected Manager’s Team’s Daily Activity page as seen below. Selecting **Back To Citywide Summary** navigates the Regional Manager to the default Citywide View (above screen).

The screenshot displays the 'Team's Daily Activity' dashboard. At the top, it shows 'Activity Summary for [Redacted] Team (Manager)' with a 'Last Updated: 10/20/2020 10:23 AM' timestamp. Below this are three main sections: 'Staff Overview', 'Tasks Status', and 'Tasks Completed'. The 'Staff Overview' table lists staff counts for various statuses. The 'Tasks Status' table shows counts for Initiated, In Progress, Incomplete, and Complete tasks. The 'Tasks Completed' table lists counts for Interviews, Applications, Recertifications, Case Changes, and Document Reviews. Below the summary is the 'Activity Detail for [Redacted] Team (Manager)' widget, which contains a table with columns for Supervisor Name, Tasks In Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, and Document Reviews. At the bottom of the dashboard are two buttons: 'BACK' and 'BACK TO CITYWIDE SUMMARY'.

Category	Count
Total Staff	118
Logged In	63
Unavailable	36
End of Shift	7
Not Logged in Today	12
Initiated	697
In Progress	71
Incomplete	165
Complete	461
Interviews	84
Applications	109
Recertifications	79
Case Changes	82
Document Reviews	107

Supervisor Name	Tasks In Progress	Tasks Incomplete	Tasks Complete	Interview	Application	Recertification	Case Change	Document Reviews
[Redacted]	11	26	92	16	26	11	18	21
[Redacted]	16	31	94	19	23	13	16	23
[Redacted]	10	24	78	15	19	11	14	19
[Redacted]	8	27	73	14	17	9	17	16
[Redacted]	11	31	82	9	14	10	9	11
[Redacted]	16	28	82	11	10	16	8	17
Total	71	165	461	84	109	79	82	107

In the Manager view (above screen), the selected Manager’s name is displayed on **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected Manager’s Team’s Daily Activity.

The **Activity Summary** widget for the selected Manager consists of **Staff Overview, Tasks Status, and Tasks Completed**. The **Staff Overview** table provides an

inventory of the Total Staff, Logged In, Unavailable, End of Shift, and Not Logged in Today. The **Tasks Status** table provides information on the number of tasks that are Initiated, In Progress, Incomplete, and Complete. The **Tasks Completed** table provide the number of tasks that are completed for Interviews, Applications, Recertifications, Case Changes, and Document Reviews.

A **View Details** link is provided within the Staff Overview table that will provide details of the Manager’s staff who are **Logged In, Unavailable, End of Shift, and Not Logged in Today**. Upon selection of the link will display a modal window consisting of columns for **Worker Name, Status, Unavailable Reason, and Date & Time**.

The **Activity Detail** widget for the selected Manager shows columns for Supervisor Name, Tasks in Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, and Document Reviews. The **Supervisor Name** column are links and upon selection, the Regional Manager can drilldown to the selected Supervisor’s Team’s Daily Activity page as seen below. Selecting **Back in** above screen navigates the Regional Manager to the previous page (Regional Manager View). Selecting **Back to Citywide Summary** in above screen navigates the Regional Manager to the default Citywide View.

The screenshot displays the 'Team's Daily Activity' interface. At the top, it shows 'Activity Summary for [Redacted] Team (Supervisor)' with a 'Last Updated' timestamp of 10/20/2020 10:23 AM. Below this are four summary tables:

- Staff Overview:**

Total Staff	15
Logged In	3
Unavailable	7
End of Shift	3
Not Logged in Today	2
- Tasks Status:**

Initiated	121
In Progress	5
Incomplete	18
Complete	90
- Tasks Completed:**

Interviews	19
Applications	15
Recertifications	22
Case Changes	26
Document Reviews	16

Below the summary tables is the 'Activity Detail for [Redacted] Team (Supervisor)' widget, also with a 'Last Updated' timestamp of 10/20/2020 10:23 AM. It features a table with the following columns: Worker Name, Tasks In Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, and Document Reviews. The table contains 10 rows of data, with a total row at the bottom. At the bottom of the widget are two green buttons: 'BACK' and 'BACK TO CITYWIDE SUMMARY'.

In the Supervisor view (above screen), the selected Supervisor’s name is displayed on **Activity Summary** and **Activity Detail** widgets. Consequently, the **Activity Summary** and **Activity Detail** widgets will reflect the information based on the selected Supervisor’s Team’s Daily Activity.

The **Activity Summary** widget for the selected Supervisor consists of **Staff Overview**, **Tasks Status**, and **Tasks Completed**. The **Staff Overview** table provides an inventory of the Total Staff, Logged In, Unavailable, End of Shift, and Not Logged in Today. The **Tasks Status** table provides information on the number of tasks that are Initiated, In Progress, Incomplete, and Complete. The **Tasks Completed** table provide the number of tasks that are completed for Interviews, Applications, Recertifications, Case Changes, and Document Reviews.

A **View Details** link is provided within the Staff Overview table that will provide details of the selected Supervisor’s staff who are **Logged In**, **Unavailable**, **End of Shift**, and **Not Logged in Today**. Upon selection of the link will display a modal window consisting of columns for **Worker Name**, **Status**, **Unavailable Reason**, and **Date & Time**.

The **Activity Detail** widget for the selected Supervisor shows columns for Worker Name, Tasks in Progress, Tasks Incomplete, Tasks Complete, Interview, Application, Recertification, Case Change, and Document Reviews. The **Worker Name** column are links and upon selection, Manager can drilldown to the selected Eligibility Specialist’s Daily Activity sheet as seen below.

- Selecting **Back** navigates the Manager to the previous page (Manager View).
- Selecting **Back to Citywide Summary** navigates Manager to the default Citywide View.

Status	Start Time	Case Number	Case Name	Start Event	WMS Status	End Event	Decision	HH Size	Duration (Mins)
✓	09:05 AM			Application - Start Interview	AP	Complete Interview - Deferred for Verification	AC-A30	6	40
⚠	09:48 AM			Application - ESNAP Processing	AP	Suspend Processing	AC-A30	6	22
✓	10:18 AM			Change Case - Change Case Ready	AC	Deferred/Pending Change Verification	AC-B32	4	21
⚠	10:42 AM			Application - Start Interview	AP	Suspend Interview	AP-	3	15
✓	11:04 AM			Recertification - Mandated Verification Received - Full	AC	Complete Processing	AC-A30	8	30
📄	11:35 AM			Document Review - Start Document Review	AC	NA	AC-A30	5	-

The name of the selected Eligibility Specialist is seen on the Daily Activity Sheet widget. The **Daily Activity Sheet** widget keeps track of and displays a summary of the Eligibility Specialist’s daily activity as a snapshot of the work completed for the current day. This allows the Eligibility Specialist to keep track of his/her work and in addition allows the Regional Manager to review the respective Eligibility Specialist’s daily progress. The **Daily Activity Sheet** provides information on the **Status**, **Start**

Time, Case Number, Case Name, Start Event, WMS Status, End Event, Decision, HH Size, and Duration (Mins):

- **Status:** The icons within this column provide context at a glance for tasks that are **Completed** (green check), **Suspended** (yellow exclamation) and **In-Progress** (blue hourglass).
 - For an Interview, the Status is Incomplete if the end event is **Suspend Interview**. Otherwise, the interview is complete.
 - For **processing actions**, the status is incomplete if the end event is **Suspend Processing** and the task status is not **Pending**. Otherwise, it is complete.
 - When an event is currently in progress:
 - Duration column for that row displays a dash (minus sign).
 - End Event column for that row displays “N/A”.
- **Start Time:**
 - Displays the time that the event was started in the format: **hh:mm AM/PM**
 - The default view is based on the ascending order of Start Time.
- **Case Number:** This is the Case Number associated with the case.
- **Case Name:** This is the WMS Case Name.
- **Start Event:** This is a combination of Task Type & the following elements:
 - For **Application** and **Recertification** Task:
 - Interview Started - If an Interview was either distributed from Get Next or started from Case Search, the element must display “Interview Started”.
 - Ready to Assign Event - For any case that was distributed and started from the Get Next button, the Ready to Assign Event will be displayed. For example, “Mandated Verification Received – Full” event.
 - SPOS Activity - For any Events that were started from Case Search, the SPOS Activity must be used. For example, “Application Modification”, “Make Case Comment”, etc.
 - For **Change Case:** The start event is typically: “Change Case Ready” (if started from Get Next) or “Start Processing” (if started from Case search).
 - For **Document Review**, the start event is always: “Start Document Review”.
- **WMS Status:** The existing WMS case status (starting state) - AP, RJ, SI, AC, CL.
- **End Event:** The final event that is triggered by the Eligibility Specialist's action. This data comes from the **Event Log**.
 - For any start events in the status of **Interview** in the **Event Log**, the End Event is always either: Suspend Interview, Complete Interview.
 - For **Change Case** events, the system checks whether a Deferral was made in the **Pending** status events; if yes, then the end event is “Deferred/Pending Change Verification”. Otherwise, the last event with a status of **Processing** is used.
 - For other **Processing-related** start events other than **Change Case**, the End Event is recorded when the Processors finishes their action in SPOS (last event with a status of **Processing** for the Eligibility Specialist).

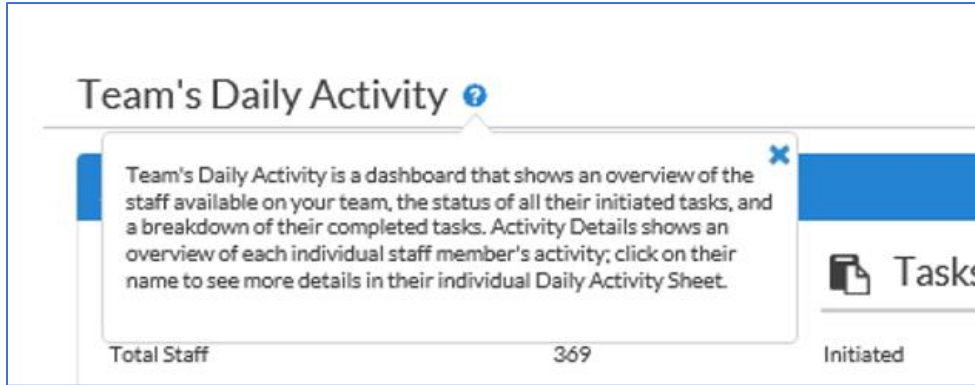
- The End Event can be Complete interview, Suspend processing or Complete processing. The End events will be further distinguished to have the exact outcome, with the possible values displayed below. The event log will also be updated accordingly.
 1. Complete Interview - No deferral
Complete Interview - Deferred for verification
Complete Interview - Deferred for IVS/RFI/SDX
Complete Interview - Deferred for verification and IVS/RFI/SDX
NOTE: For the Interview, the End Event will be the latest event in status of Interview
 2. Suspend Processing - Deferred for change verification
NOTE: For processing actions, the end event should be the latest event in the status of Processing
- For cases that are “In Progress”, the End Event column will reflect N/A for the respective row.
- **Decision:** This is the Status and Reason Code selected in SPOS (End State), as it represents the action that the Eligibility Specialist took on the case to end their processing and reach a case outcome.
- The decoded value is needed. For example: **AC-A30** (Same Approval each month), **RJ-V21** (Failure to Provide Verification), **SI-Q22** (Expedited Pending Verification).
- The description of the code will not be included.
- If there is no SPOS decision code, then the reason code will be blank. For example, “Applying (AP) “, “Active (AC)-“
- **HH Size:** Number of people in AP, Single Issue (SI) or AC status in associated with the WMS case.
- **Duration (Min):** This value will be the time, in minutes, it takes an Eligibility Specialist to process the task/activity on the case.
 - For cases that are “In Progress”, the duration field will display a dash (minus sign) for the respective row.

The header level of the widget shows the time the selected Eligibility Specialist has spent in the ANGIE system in the format: **Hours in System: X hrs YY min**

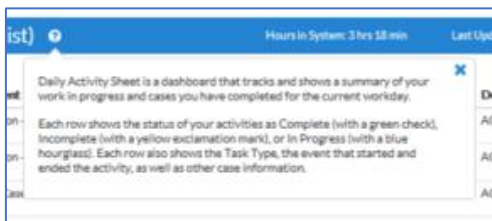
Selection of the **Refresh** button at the header of this widget will refresh the data for the Daily Activity widget. Consequently, the last updated timestamp will also update.

- Selecting **Back** navigates the Regional Manager to the previous page (Supervisor View).
- Selecting **Back to Citywide Summary** navigates Regional Manager to the default Citywide View.

Help Text - Team’s Daily Activity Page



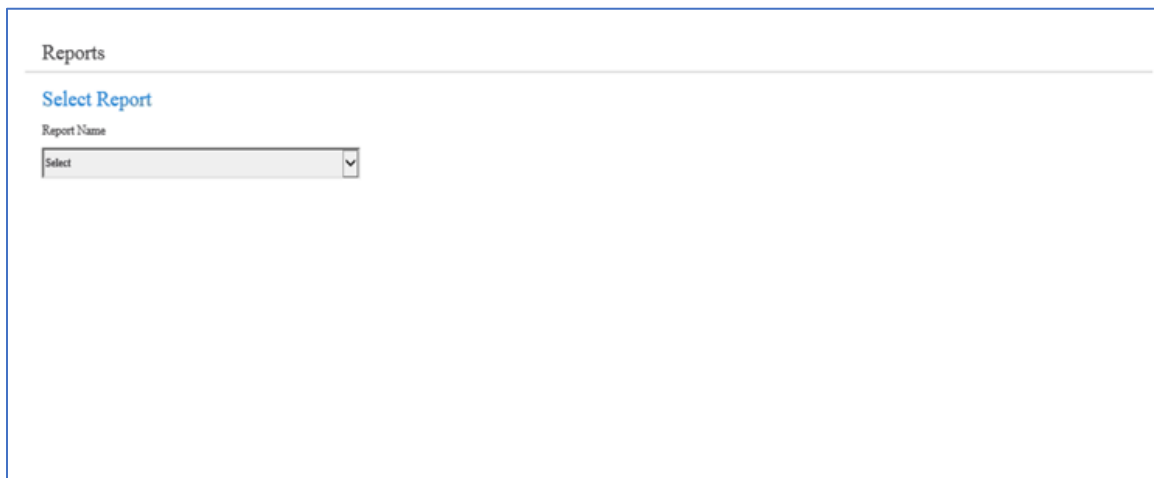
Help Text on Eligibility Specialist's Daily Activity Sheet:



11. Reports Page

The Regional Manager possessing the skillset of **See Reports** will have access to the **Reports** page and can generate the following reports:

- **Daily Activity**
- **Deferrals**
- **Staff Overview**
- **Timings**
- **Work Outstanding**



12. Daily Activity Report

The Regional Manager can generate the **Daily Activity** report from the **Reports** page of ANGIE. This report provides information to the Regional Manager on the Daily Activity snapshots (as of midnight that day) for the selected date range, allowing the management to review progress made by the selected staff. After selecting **Daily Activity** from the report dropdown, the Regional Manager will see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range as seen below.

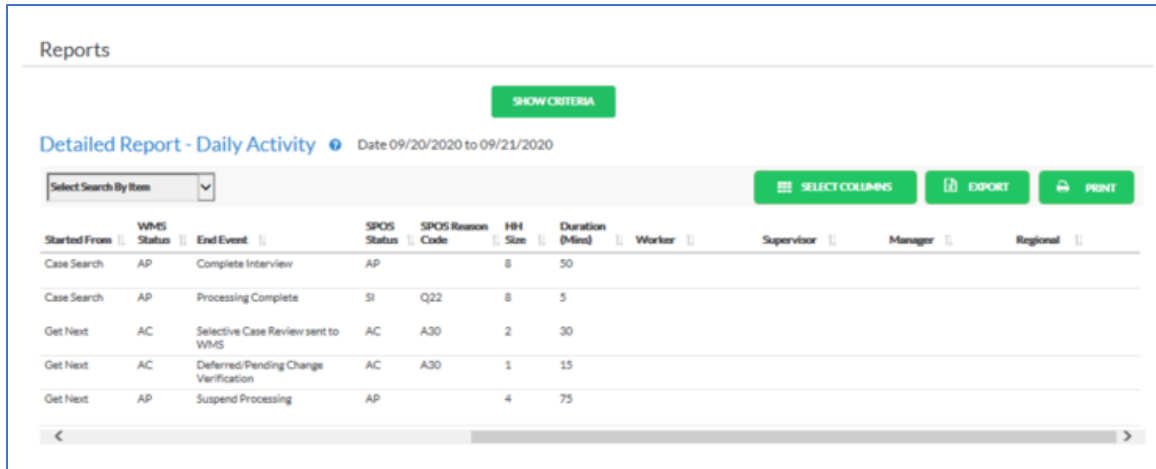
The screenshot shows the 'Reports' interface. Under 'Select Report', the 'Daily Activity' option is selected in a dropdown menu. Below this, the 'Select Retrieve Criteria' section contains two date pickers: 'From' is set to 09/20/2020 and 'To' is set to 09/21/2020. At the bottom of this section are three green buttons: 'HIDE CRITERIA', 'CLEAR CRITERIA', and 'RETRIEVE REPORT'.

- Selecting the **Retrieve Report** button will display the **Detailed Report – Daily Activity** section. The report will be displayed within the **Detailed Report - Daily Activity** section of the page. The default view of this report will hide the Search Criteria as seen below.

The screenshot displays the 'Detailed Report - Daily Activity' page. At the top, there is a 'SHOW CRITERIA' button. Below it, the report title 'Detailed Report - Daily Activity' is shown with a date range of 'Date 09/20/2020 to 09/21/2020'. A search dropdown is set to 'Select Search By Item'. To the right are buttons for 'SELECT COLUMNS', 'EXPORT', and 'PRINT'. The main content is a table with the following data:

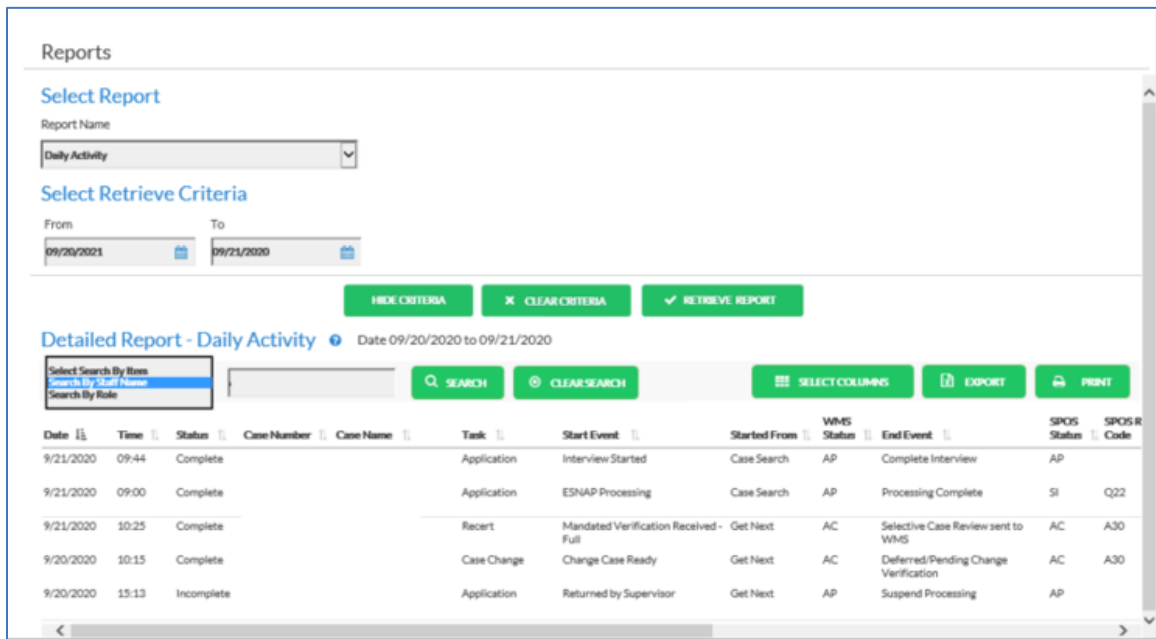
Date	Time	Status	Case Number	Case Name	Task	Start Event	Started From	WMS Status	End Event	SPOS Status	SPOS Code
9/21/2020	09:44	Complete			Application	Interview Started	Case Search	AP	Complete Interview	AP	
9/21/2020	09:00	Complete			Application	ESNAP Processing	Case Search	AP	Processing Complete	SI	Q22
9/21/2020	10:25	Complete			Recert	Mandated Verification Received - Full	Get Next	AC	Selective Case Review sent to WMS	AC	A30
9/20/2020	10:15	Complete			Case Change	Change Case Ready	Get Next	AC	Deferred/Pending Change Verification	AC	A30
9/20/2020	15:13	Incomplete			Application	Returned by Supervisor	Get Next	AP	Suspend Processing	AP	

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Selecting the **Show Criteria** button will display the Selected Retrieve Criteria as seen below:

- The Regional Manager can further search **By Staff Name** or **By Role** (SNAP Eligibility Specialist, SNAP Supervisor, SNAP Manager, SNAP Regional, Clerical Associate).
- Columns consist of **Date, Time, Status, Case Number, Task, Start Event, Started From, WMS Status, End Event, SPOS Status, SPOS Reason Code, HH Size, Duration (Mins), Worker, Supervisor, Manager, and Regional.**
- The Horizontal scroll bar allows the Regional Manager to scroll horizontally.



The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

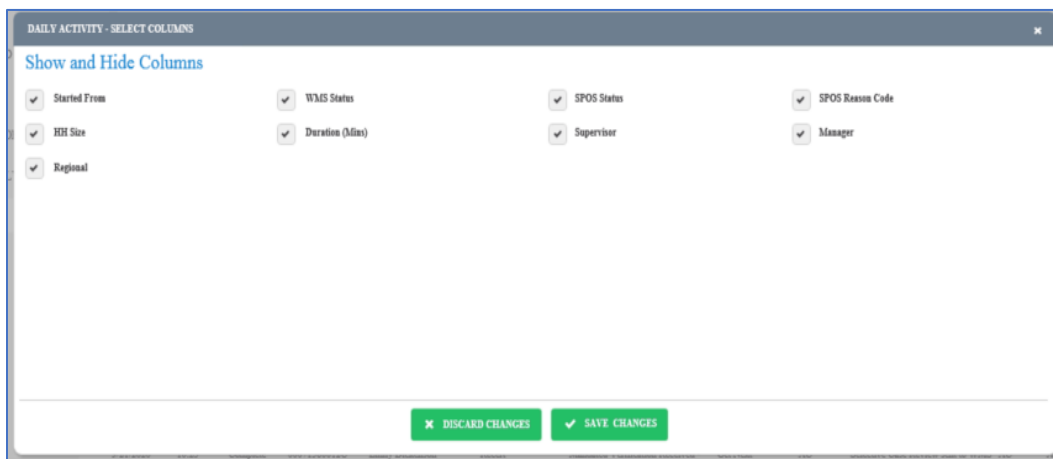
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- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

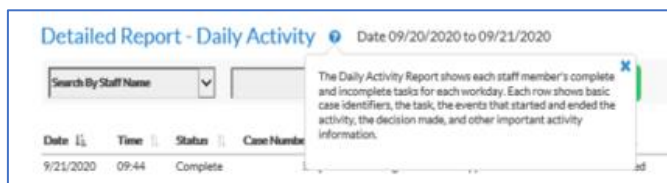
The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

- Selecting Print generates a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option allows export to Excel.

Upon clicking the **Select Columns** button, the Regional Manager will see a modal window to choose the desired columns for the report. **Save changes** will apply only to the selected columns of the report.



Help Text displayed for Daily Activity report within the Detailed Report section:

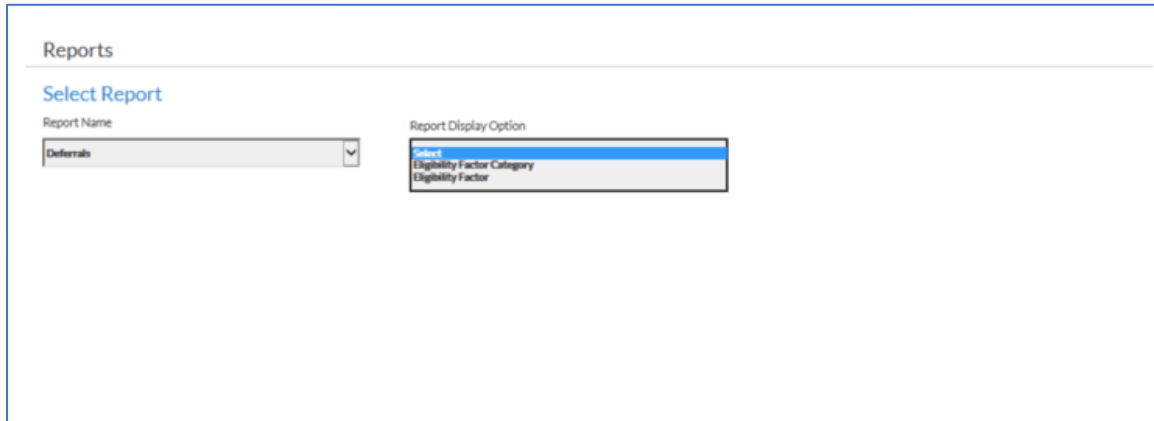


13. Deferrals Report

The Regional Manager can generate the Deferrals report from the Reports page of ANGIE. This report will display all deferrals initiated for Applications and Recertifications broken down by the **Eligibility Factor** and the **Eligibility Factor Category** for a given date range.

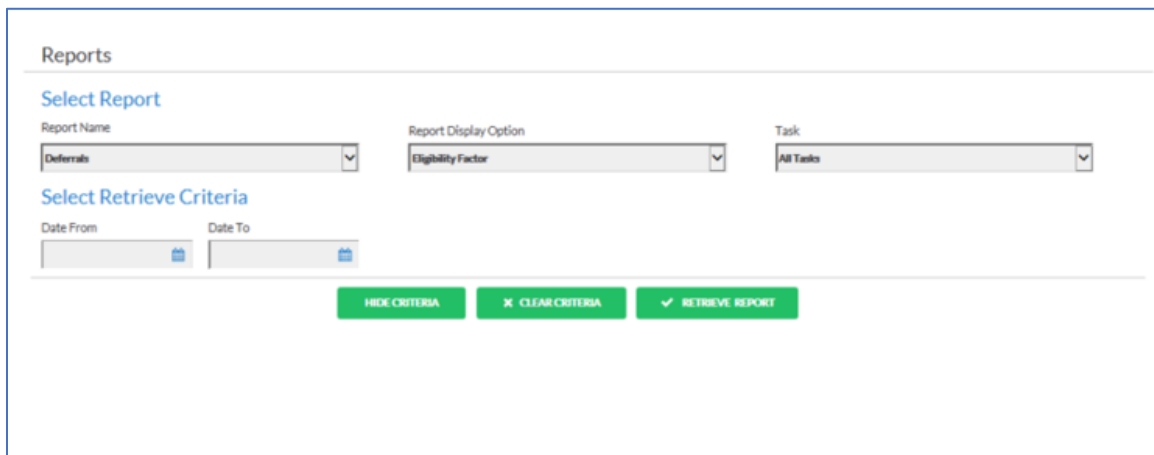
Deferrals Report – Eligibility Factor

Upon selection of the **Deferrals** option from the Report Name dropdown, the Regional Manager will see the **Report Display Option** dropdown consisting of **Eligibility Factor Category** and **Eligibility Factor**.



The screenshot shows a web interface titled "Reports". Under the heading "Select Report", there are two dropdown menus. The first, "Report Name", has "Deferrals" selected. The second, "Report Display Option", is open and shows two options: "Eligibility Factor Category" and "Eligibility Factor".

After **Eligibility Factor** is selected, the Regional Manager will see the **Task** dropdown consisting of **All Tasks**, **Applications**, and **Recertifications**. **All Tasks** is selected in below screen.



The screenshot shows the "Reports" interface with the "Select Report" section. The "Report Name" dropdown is "Deferrals", "Report Display Option" is "Eligibility Factor", and "Task" is "All Tasks". Below this is the "Select Retrieve Criteria" section, which includes "Date From" and "Date To" fields with calendar icons. At the bottom, there are three buttons: "HIDE CRITERIA", "X CLEAR CRITERIA", and "✓ RETRIEVE REPORT".

Note:

- When the **Task** filter is set as **Applications**, the Regional Manager must have an additional filter of **File Date** that allows them to set the date range of SNAP file dates for the report output.
- When the **Task** filter is set as **Recertifications**, the Regional Manager must have an additional filter of **Interview Date** that allows them to set the date range of the interview month for the report output. Note that a full month date range must be selected (beginning of a month and end of a month), as the Recertification data is based on the Interview Month cohort and NOT the

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actual month the client conducted their Recertification interview. It should also be noted that the Interview Date is based on the Original Appointment Date.

- When the **Task** filter is set as **All Tasks**, the Regional Manager must have an additional filter for Date Range, which will be applied to Applications tasks as File Date and Recertifications tasks as Interview Date for the report output. Note that a full month date range must be selected (beginning of a month and end of a month), as the Recertification data is based on the Interview Month cohort and NOT the actual month the client conducted their Recertification interview

The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the appropriate date range as seen below.

The screenshot shows the 'Reports' interface. Under 'Select Report', there are three dropdown menus: 'Report Name' set to 'Deferrals', 'Report Display Option' set to 'Eligibility Factor', and 'Task' set to 'All Tasks'. Below this is the 'Select Retrieve Criteria' section with 'Date From' and 'Date To' both set to '11/01/2020'. At the bottom are three buttons: 'HIDE CRITERIA', 'X CLEAR CRITERIA', and '✓ RETRIEVE REPORT'.

- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria.

The screenshot shows the 'Detailed Report - Deferrals By Eligibility Factor (All Tasks)' for the date range 11/01/2020 to 11/30/2020. It includes a 'SHOW CRITERIA' button and 'EXPORT' and 'PRINT' buttons. The summary table is as follows:

	Total	Applications Interviews	Applications Processing	Recertifications Interviews	Recertifications Processing
Tasks Completed	2917	142	1543	132	1100
Deferrals	500	102	221	101	136
Percent Deferred of Completed	19%	72%	14%	77%	12%

Below the summary table is a detailed table for 'Deferrals by Eligibility Factor':

Eligibility Factor Category	Eligibility Factor	Deferrals		Applications Interviews		Applications Processing		Recertifications Interviews		Recertifications Processing	
		Count	Percent	Count	Percent	Count	Percent	Count	Percent	Count	Percent
Age	Age	214	43%	65	64%	45	20%	69	68%	35	26%
Citizenship	U.S. Citizenship	189	38%	72	71%	30	14%	72	71%	15	11%
Dependent Care Cost/Other Expenses	Child Care/Dependent Care	167	33%	56	55%	29	13%	70	69%	12	9%
Dependent Care Cost/Other Expenses	Child Support Expense	120	24%	14	14%	28	13%	68	67%	10	7%

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- Click the **Show Criteria** button to display the selected criteria as seen below.

The screenshot shows a web interface for generating reports. At the top, there are dropdown menus for 'Report Name' (set to 'Deferrals'), 'Report Display Option' (set to 'Eligibility Factor'), and 'Task' (set to 'All Tasks'). Below these are date pickers for 'Date From' (11/01/2020) and 'Date To' (11/30/2020). Three buttons are visible: 'HIDE CRITERIA', 'CLEAR CRITERIA', and 'RETRIEVE REPORT'. The main report title is 'Detailed Report - Deferrals By Eligibility Factor (All Tasks)' with a date range of 'Date 11/01/2020 to 11/30/2020'. There are 'EXPORT' and 'PRINT' buttons. The report contains two tables.

	Total	Applications Interviews	Applications Processing	Recertifications Interviews	Recertifications Processing
Tasks Completed	2917	142	1543	132	1100
Deferrals	500	102	221	101	130
Percent Deferred of Completed	19%	72%	14%	77%	12%

Eligibility Factor Category	Eligibility Factor	Deferrals	Applications Interviews		Applications Processing		Recertifications Interviews		Recertifications Processing	
			Count	Percent	Count	Percent	Count	Percent	Count	Percent
Age	Age	214	65	64%	45	20%	69	68%	35	26%
Citizenship	U.S. Citizenship	189	72	71%	30	14%	72	71%	15	11%
Dependent Care Cost/Other Expenses	Child Care/Dependent Care	167	56	55%	29	13%	70	69%	12	9%
Dependent Care Cost/Other Expenses	Child Support Expense	120	14	14%	28	13%	68	67%	10	7%
Disabled/Incapacitated	Blind, Sick, Disabled or Activity Limited	118	15	15%	27	12%	67	66%	9	7%
Disabled/Incapacitated	Drug or alcohol dependent	110	14	14%	27	12%	67	66%	8	6%
Earned Income	Employed	112	12	12%	26	12%	66	65%	8	6%

The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen
- The Regional Manager will be able to show/hide the filter criteria at the top of each report

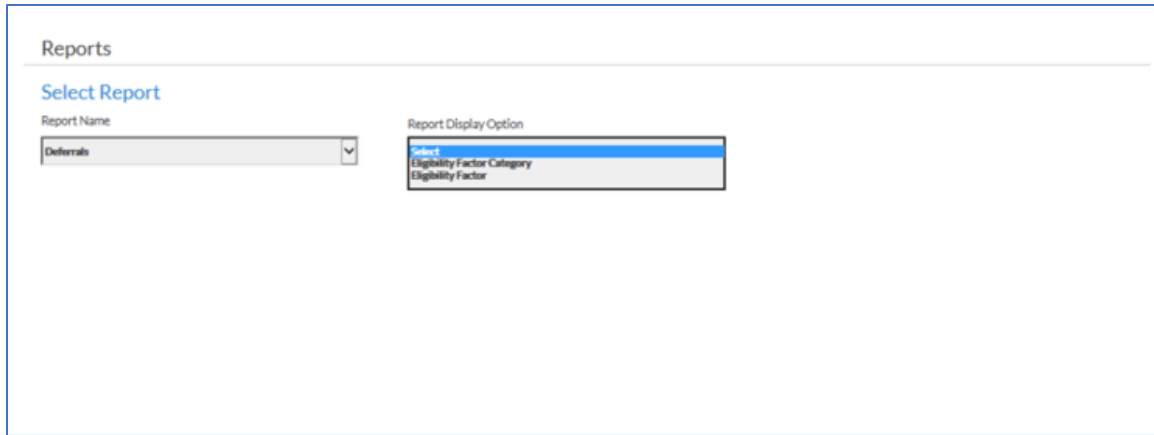
The report has additional functions that allow the Regional Manager to print and export the data.

- Selecting Print generates a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option allows export to Excel.

Deferrals Report – Eligibility Factor Category

Upon selection of the **Deferrals** option from the Report Name dropdown, the Regional Manager will see the **Report Display Option** dropdown consisting of **Eligibility Factor Category** and **Eligibility Factor**.

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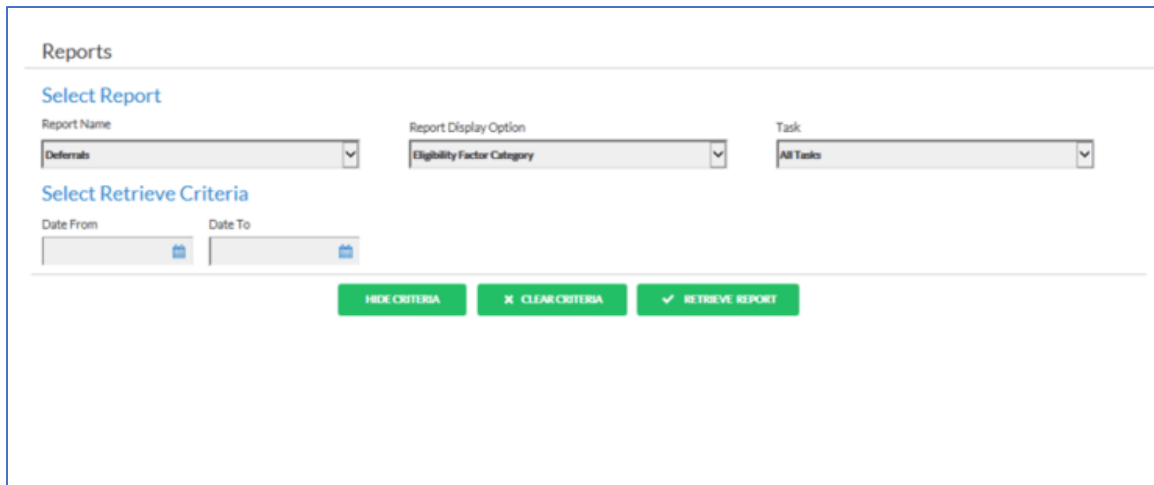
Reports

Select Report

Report Name
Deferrals

Report Display Option
Select
Eligibility Factor Category
Eligibility Factor

After the **Eligibility Factor Category** is selected, the Regional Manager will see the **Task** dropdown consisting of **All Tasks**, **Applications**, and **Recertifications**. **All Tasks** is selected in below screen.



Reports

Select Report

Report Name
Deferrals

Report Display Option
Eligibility Factor Category

Task
All Tasks

Select Retrieve Criteria

Date From
Date To

HIDE CRITERIA CLEAR CRITERIA RETRIEVE REPORT

Note:

- When the Task filter is set as **Applications**, the Regional Manager must have an additional filter of **File Date** that allows them to set the date range of SNAP File Dates for the report output.
- When the Task filter is set as **Recertifications**, the Regional Manager must have an additional filter of **Interview Date** that allows them to set the date range of the interview month for the report output. Note that a full month date range must be selected (beginning of a month and end of a month), as the Recertification data is based on the Interview Month cohort and NOT the actual month the applicant/participant conducted their Recertification interview. It should be noted that the Interview Date is based on the Original Appointment Date.
- When the Task filter is set as **All Tasks**, the Regional Manager must have an additional filter for Date Range, which will be applied to Applications tasks as File Date and Recertification tasks as Interview Date for the report output.

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Note that a full month date range should be selected (beginning of a month and end of a month), as the Recertification data is based on the Interview Month cohort and NOT the actual month the applicant/participant conducted their Recertification interview.

The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the appropriate date range as seen below.

The screenshot displays a web interface for generating reports. At the top, the word "Reports" is visible. Below it, the "Select Report" section contains three dropdown menus: "Report Name" (set to "Deferrals"), "Report Display Option" (set to "Eligibility Factor Category"), and "Task" (set to "All Tasks"). The "Select Retrieve Criteria" section features two date input fields: "Date From" (set to 11/01/2020) and "Date To" (set to 11/30/2020). At the bottom of this section, there are three green buttons: "HIDE CRITERIA", "X CLEAR CRITERIA", and "✓ RETRIEVE REPORT".

- Click the **Retrieve Report** button to display the **Detailed Report** section. The report is displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria.

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Reports

[SHOW CRITERIA](#)

Detailed Report - Deferrals By Eligibility Factor Category (All Tasks) Date 11/01/2020 to 11/30/2020

[EXPORT](#) [PRINT](#)

	Total	Applications Interviews	Applications Processing	Recertifications Interviews	Recertifications Processing
Tasks Completed	2917	142	1543	132	1100
Deferrals	560	102	221	101	136
Percent Deferred of Completed	19%	72%	14%	77%	12%

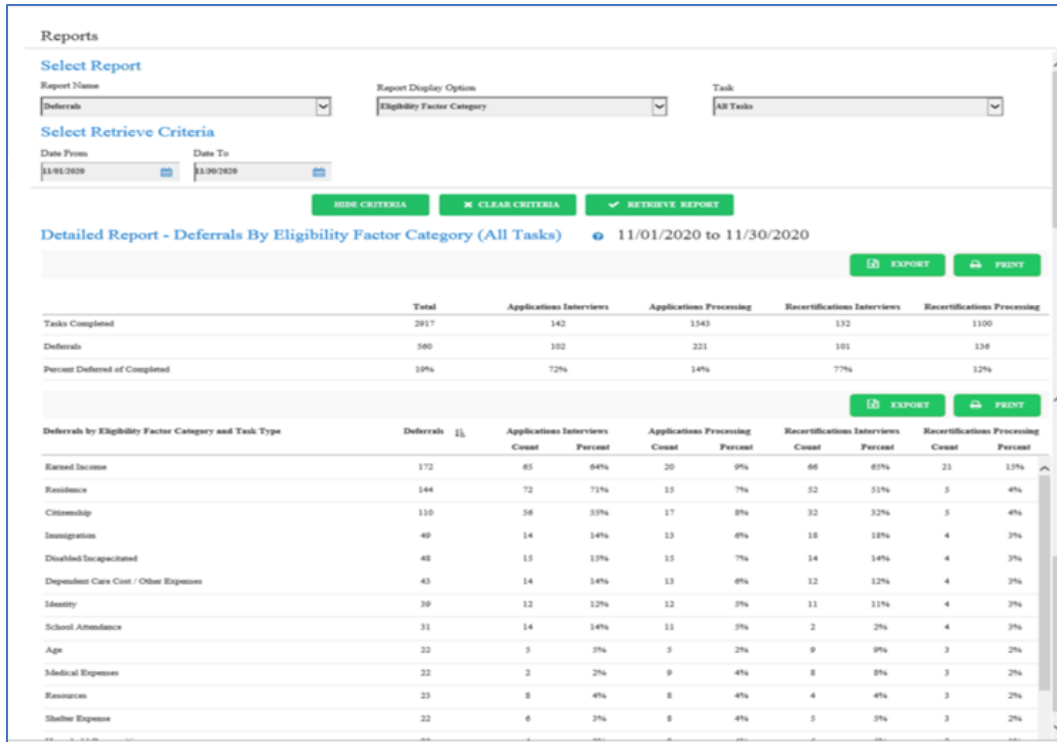
[EXPORT](#) [PRINT](#)

Deferrals by Eligibility Factor Category and Task Type

	Deferrals	Applications Interviews		Applications Processing		Recertifications Interviews		Recertifications Processing	
		Count	Percent	Count	Percent	Count	Percent	Count	Percent
Earned Income	172	65	64%	20	9%	66	65%	21	15%
Residence	144	72	71%	15	7%	52	51%	5	4%
Citizenship	110	56	55%	17	8%	32	32%	5	4%
Immigration	49	14	14%	13	6%	18	18%	4	3%
Disabled/Incapacitated	48	15	15%	15	7%	14	14%	4	3%
Dependent Care Cost / Other Expenses	43	14	14%	13	6%	12	12%	4	3%
Identity	39	12	12%	12	5%	11	11%	4	3%
School Attendance	31	14	14%	11	5%	2	2%	4	3%
Age	22	5	5%	5	2%	9	9%	3	2%
Medical Expenses	22	2	2%	9	4%	8	8%	3	2%
Resources	23	8	4%	8	4%	4	4%	3	2%
Shelter Expense	22	6	3%	8	4%	5	5%	3	2%
Household Composition	20	4	2%	8	4%	6	6%	2	1%

- Click the **Show Criteria** button to display the selected criteria as seen below.

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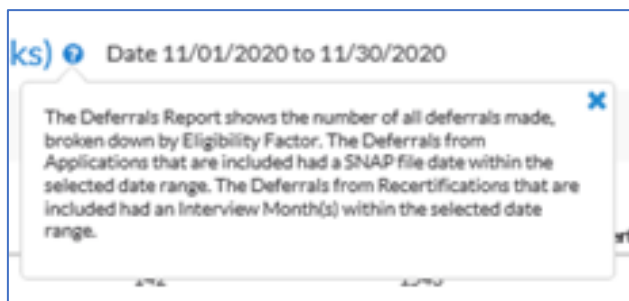
The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above
- The Regional Manager will be able to show/hide the filter criteria at the top of each report

The report has additional functions that allow the Manager to print and Export the data.

- Selecting Print generates a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option allows export to Excel.

Help Text displayed for Deferrals report:



14. Staff Overview Report

The Regional Manager can generate the Staff Overview report from the Reports page of ANGIE. This report provides information about the Staff in terms of their login times, logout times, hours in system, hold and return activity based on a date range.

Staff Overview Report – Summary View

- After selecting **Staff Overview** from the Report Name dropdown, the Regional Manager must select a view from **Report Display Option** dropdown consisting of Summary View and Detail View. The screen below shows when **Summary View** is selected. The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range.

Reports

Select Report

Report Name: Staff Overview

Report Display Option: Summary View

Select Retrieve Criteria

From: 09/21/2020 To: 09/25/2020

HIDE CRITERIA CLEAR CRITERIA RETRIEVE REPORT

- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria as seen below.

Reports

SHOW CRITERIA

Detailed Report - Staff Overview (Summary View) Date: 09/21/2020 to 09/25/2020

Select Search By Item

SELECT COLUMNS EXPORT PRINT

Date	Name	Role	Login Time	Logout Time	Hours in System	Returns	Hold Duration (Mins)	Supervisor	Manager	Regional
9/21/2020		SNAP Eligibility Specialist	09:00	17:15	6 hrs. 49 mins	1	37			
9/22/2020		SNAP Eligibility Specialist	09:02	17:00	6 hrs. 45 mins	4	20			
9/23/2020		SNAP Eligibility Specialist	08:05	16:30	6 hrs. 59 mins	2	90			
9/24/2020		SNAP Eligibility Specialist	09:10	13:16	4 hrs. 3 mins	6	45			
9/25/2020		SNAP Eligibility Specialist	08:51	17:03	7 hrs. 5 mins	0	5			
9/21/2020		SNAP Eligibility Specialist	08:02	16:30	6 hrs. 59 mins	2	14			
9/22/2020		SNAP Eligibility Specialist	09:04	13:19	4 hrs. 3 mins	3	45			
9/23/2020		SNAP Eligibility Specialist	08:58	17:03	7 hrs. 5 mins	0	8			
9/24/2020		SNAP Eligibility Specialist	09:06	17:03	6 hrs. 18 mins	1	18			
9/25/2020		SNAP Eligibility Specialist	09:17	17:01	6 hrs. 45 mins	4	20			

- Click the **Show Criteria** button to display the criteria as seen below.

The screenshot shows the 'Reports' section of a system. Under 'Select Report', 'Staff Overview' is selected. Under 'Report Display Option', 'Summary View' is selected. The 'Select Retrieve Criteria' section shows a date range from 09/21/2020 to 09/25/2020. Below this are buttons for 'HIDE CRITERIA', 'CLEAR CRITERIA', and 'RETRIEVE REPORT'. The main report area is titled 'Detailed Report - Staff Overview (Summary View)' for the date range 09/21/2020 to 09/25/2020. It includes a search bar with 'SEARCH' and 'CLEAR SEARCH' buttons, and 'SELECT COLUMNS', 'EXPORT', and 'PRINT' buttons. A table displays the following data:

Date	Name	Role	Login Time	Logout Time	Hours in System	Returns	Hold Duration (Mins)	Supervisor	Manager	Regional
09/21/2020		SNAP Eligibility Specialist	09:00	17:15	6 hrs. 49 mins	1	37			
09/22/2020		SNAP Eligibility Specialist	09:02	17:00	6 hrs. 45 mins	4	20			
09/23/2020		SNAP Eligibility Specialist	08:05	16:30	6 hrs. 59 mins	2	90			
09/24/2020		SNAP Eligibility Specialist	09:10	13:16	4 hrs. 3 mins	6	45			

The Regional Manager can further search by **Staff Name** or **By Role** (SNAP Eligibility Specialist, SNAP Supervisor, SNAP Manager, SNAP Regional, Clerical Associate). The columns for this report consist of Date, Name, Role, Login Time, Logout Time, Hours in System, Returns, Hold Duration (Mins), Supervisor, Manager, and Regional. All columns are sortable.

The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and Retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

- Selecting Print generates a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option allows export to Excel.

Staff Overview Report – Detail View

- After selecting **Staff Overview** from the Report Name dropdown, the Regional Manager must select a view from **Report Display Option** dropdown consisting of Summary View and Detail View. Below screen shows when **Detail View** is selected. The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range.

Reports

Select Report

Report Name: Staff Overview | Report Display Option: Detail View

Select Retrieve Criteria

From: 09/21/2020 | To: 09/21/2020

HIDE CRITERIA | CLEAR CRITERIA | RETRIEVE REPORT

- Selecting the **Retrieve Report** button will display the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page as seen below. The default view of this report will hide the criteria as seen below.

Reports

SHOW CRITERIA

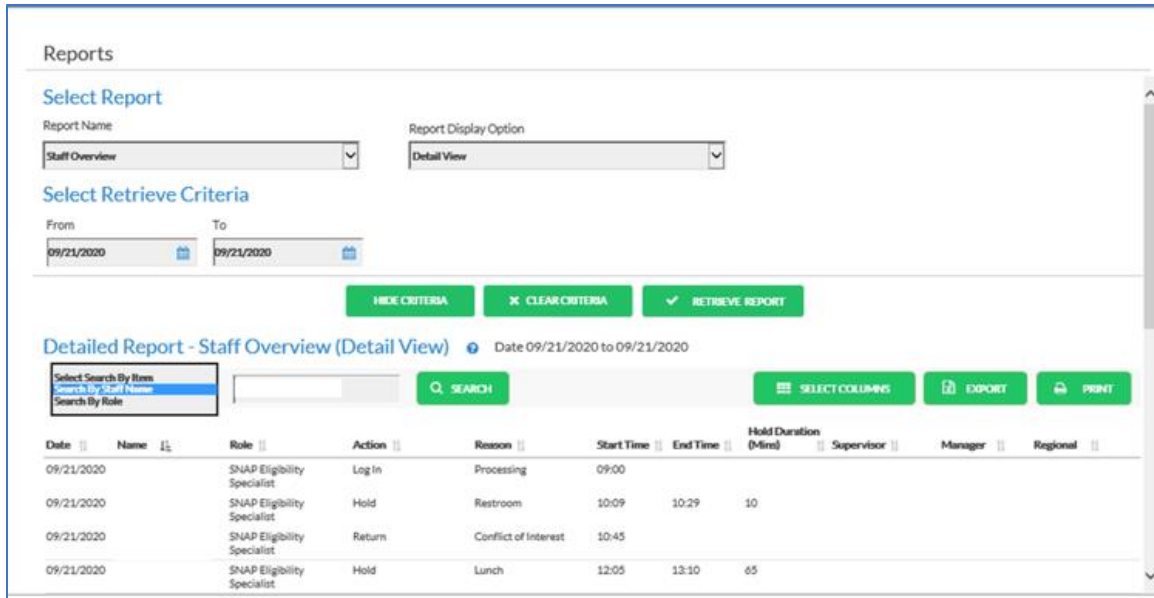
Detailed Report - Staff Overview (Detail View) | Date: 09/21/2020 to 09/21/2020

Select Search By Item | SELECT COLUMNS | EXPORT | PRINT

Date	Name	Role	Action	Reason	Start Time	End Time	Hold Duration (Mins)	Supervisor	Manager	Regional
09/21/2020		SNAP Eligibility Specialist	Log In	Processing	09:00					
09/21/2020		SNAP Eligibility Specialist	Hold	Restroom	10:09	10:29	10			
09/21/2020		SNAP Eligibility Specialist	Return	Conflict of Interest	10:45					
09/21/2020		SNAP Eligibility Specialist	Hold	Lunch	12:05	13:10	65			
09/21/2020		SNAP Eligibility Specialist	Log Out	Idle Timeout	12:20					
09/21/2020		SNAP Eligibility Specialist	Log In	Interviews	13:09					
09/21/2020		SNAP Eligibility Specialist	Hold	Supervisor Help	14:10	14:55	45			
09/21/2020		SNAP Eligibility Specialist	Hold	Break	15:13	15:25	12			
09/21/2020		SNAP Eligibility Specialist	Log Out	End of Shift		17:15				
09/21/2020		SNAP Eligibility Specialist	Log In	Interviews	09:11					

- Click the **Show Criteria** button to display the criteria as seen below.

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The Regional Manager can further search by **Staff Name** or **By Role** (SNAP Eligibility Specialist, SNAP Supervisor, SNAP Manager, SNAP Regional, Clerical Associate). The columns for this report consist of Date, Name, Role, Action, Reason, Start Time, End Time, Hold Duration (Mins), Supervisor, Manager, and Regional. All columns are sortable.

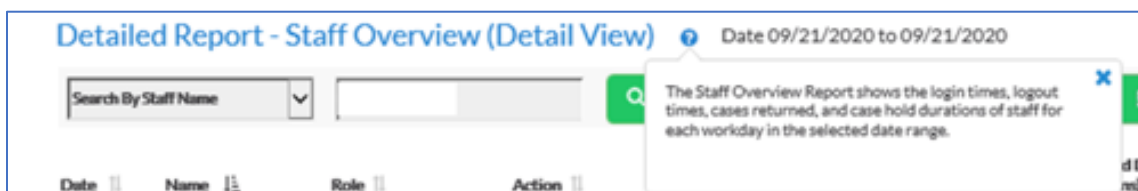
The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

- Selecting Print generates a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option allows export to Excel.

Help Text displayed for the Staff Overview report within Detailed Report section:

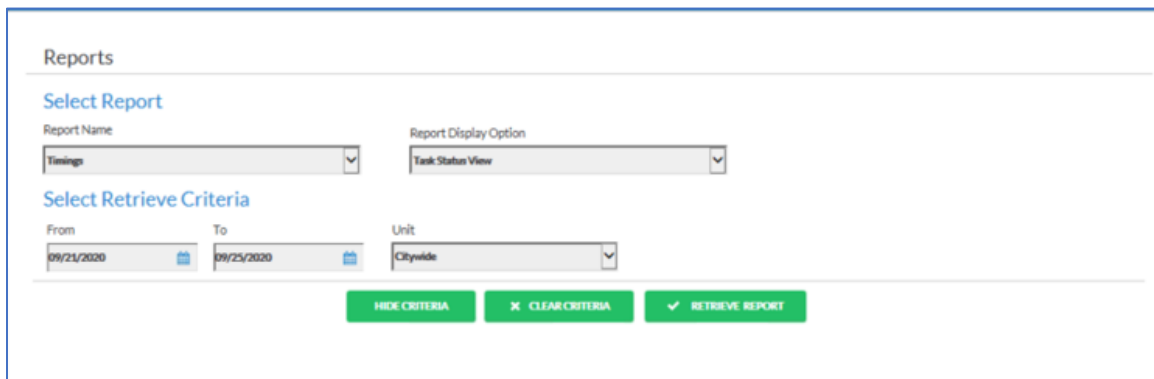


15. Timings Report

The Regional Manager can generate the Timings report from the Reports page of ANGIE. This report provides information on the time taken to complete the work in SPOS activities so that the Regional Manager can determine how long actions are taken at each step of the lifecycle.

Timings Report – Task Status View

After selecting the **Timings** option from the Report Name dropdown, the **Report Display Option** dropdown consisting of **Task Status View** and **Activity View** will be displayed. The screen below shows **Task Status View** selected. The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range. From the **Unit** dropdown, the Regional Manager must select an option consisting of **Citywide**, **Regional**, and **Manager**. The screen below shows **Citywide** selected.



The screenshot displays the 'Reports' section of the ANGIE interface. Under the heading 'Select Report', there are two dropdown menus: 'Report Name' with 'Timings' selected and 'Report Display Option' with 'Task Status View' selected. Below this is the 'Select Retrieve Criteria' section, which includes three input fields: 'From' with the date '09/21/2020', 'To' with the date '09/25/2020', and 'Unit' with 'Citywide' selected. At the bottom of the form are three green buttons: 'HIDE CRITERIA', 'X CLEAR CRITERIA', and '✓ RETRIEVE REPORT'.

- Selecting the **Retrieve Report** button displays the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page. The default view of this report will hide the criteria as seen below.

Attachment E Regional Manager & Business Administrator Roles
 ANGIE Release 1 Notes

Reports

[SHOW CRITERIA](#)

Detailed Report - Timings (Task Status view) Date 09/21/2020 to 09/25/2020, Citywide

Select Search By Item [SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Unit	Task	Status	Count	Mean Duration (Mins)	Median Duration (Mins)
Citywide	Application	Interview	17461	5.183	2.917
Citywide	Application	Processing	15002	3.086	2.133
Citywide	Application	Supervisory	12450	10.566	6.733
Citywide	Change Case	Processing	15002	3.086	2.133
Citywide	Change Case	Supervisory	12450	10.566	6.733
Citywide	Document Review	Processing	15002	3.086	2.133
Citywide	Recertification	Interview	15777	2.157	1.117
Citywide	Recertification	Processing	12176	1.695	1.05
Citywide	Recertification	Supervisory	11533	6.064	1.05

- Click the **Show Criteria** button to display the screen below.

Reports

Select Report

Report Name: Report Display Option:

Select Retrieve Criteria

From: To: Unit:

[HIDE CRITERIA](#) [CLEAR CRITERIA](#) [RETRIEVE REPORT](#)

Detailed Report - Timings (Task Status view) Date 09/21/2020 to 09/25/2020, Citywide

Search By Task: [SEARCH](#) [CLEAR SEARCH](#) [SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Unit	Task	Status	Count	Mean Duration (Mins)	Median Duration (Mins)
Citywide	Application	Interview	17461	5.183	2.917
Citywide	Application	Processing	15002	3.086	2.133
Citywide	Application	Supervisory	12450	10.566	6.733
Citywide	Change Case	Processing	15002	3.086	2.133

Within the Detailed Report section, the Regional Manager can further **Search By Task** consisting of **Applications, Recertifications, Case Changes, Document Reviews**. This will further refine the search results based on the selected Task. The columns for this report consist of **Unit, Task, Status, Count, Mean Duration (Mins), and Median Duration (Mins)**. All columns are sortable.

The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

- The selected criteria will be displayed with the report title.

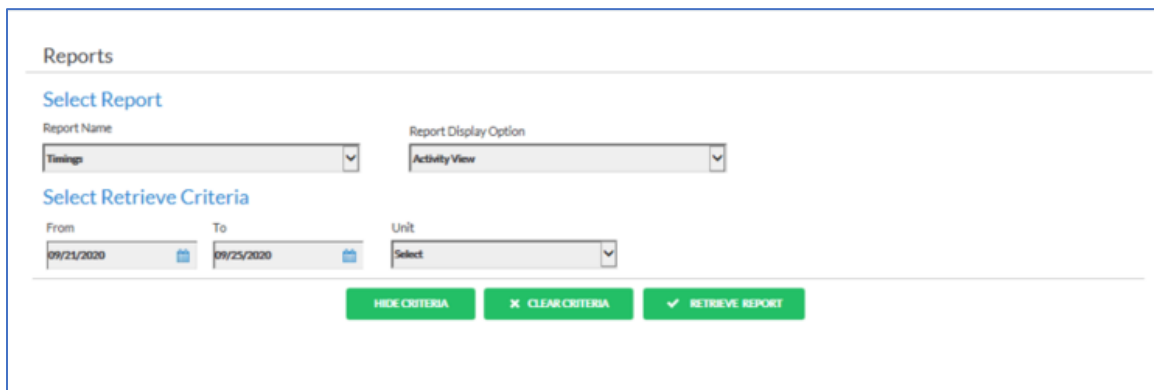
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

- Selecting Print generates a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option allows export to Excel.

Timings Report – Activity View

After selecting the **Timings** option from the Report Name dropdown, the **Report Display Option** dropdown consisting of **Task Status View** and **Activity View** will display. The screen below shows **Activity View** selected. The Regional Manager will then see the **Select Retrieve Criteria** section and must enter the **From** and **To** date range. From the **Unit** dropdown, the Regional Manager must select an option consisting of **Citywide**, **Regional**, and **Manager**. The screen below shows **Citywide** selected.



The screenshot shows a web interface for configuring a report. At the top, it says "Reports". Below that is a section titled "Select Report" with two dropdown menus: "Report Name" (set to "Timings") and "Report Display Option" (set to "Activity View"). Below this is a section titled "Select Retrieve Criteria" with three input fields: "From" (set to "09/21/2020"), "To" (set to "09/25/2020"), and "Unit" (set to "Select"). At the bottom of the form are three green buttons: "HIDE CRITERIA", "X CLEAR CRITERIA", and "✓ RETRIEVE REPORT".

- Selecting the **Retrieve Report** button displays the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page. The default view of this report will hide the criteria as seen below.

Attachment E Regional Manager & Business Administrator Roles
 ANGIE Release 1 Notes

Reports

[SHOW CRITERIA](#)

Detailed Report - Timings (Activity view) Date 09/21/2020 to 09/25/2020, Citywide

Select Search By Item [SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Unit	Task	Status	Activity	Count	Mean Duration (Mins)	Median Duration (Mins)
Citywide	Application	Interview	Application	17461	5.183	2.917
Citywide	Application	Interview	Application Modification	17461	5.183	2.917
Citywide	Application	Interview	Make Case Comment	17461	5.183	2.917
Citywide	Application	Interview	Print Form	17461	5.183	2.917
Citywide	Application	Processing	Application	15002	3.086	2.133
Citywide	Application	Processing	Application Modification	15002	3.086	2.133
Citywide	Application	Processing	EC - Application	15002	3.086	2.133
Citywide	Application	Processing	EC - ESNAP	15002	3.086	2.133
Citywide	Application	Processing	EC - FTK,Application	15002	3.086	2.133
Citywide	Application	Processing	ESNAP	15002	3.086	2.133

Click the **Show Criteria** button to display the screen below.

Reports

Select Report

Report Name: Report Display Option:

Select Retrieve Criteria

From: To: Unit:

[HIDE CRITERIA](#) [CLEAR CRITERIA](#) [RETRIEVE REPORT](#)

Detailed Report - Timings (Activity view) Date 09/21/2020 to 09/25/2020, Citywide, All Tasks

Search By Task: [SEARCH](#) [CLEAR SEARCH](#) [SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Unit	Task	Status	Activity	Count	Mean Duration (Mins)	Median Duration (Mins)
Citywide	Application	Interview	Application	17461	5.183	2.917
Citywide	Application	Interview	Application Modification	17461	5.183	2.917
Citywide	Application	Interview	Make Case Comment	17461	5.183	2.917
Citywide	Application	Interview	Print Form	17461	5.183	2.917

Within the Detailed Report section, the Regional Manager can further **Search By Task** consisting of **Applications, Recertifications, Case Changes, and Document Reviews**. This will further refine the search results based on the selected Task. The columns for this report consist of **Unit, Task, Status, Activity, Count, Mean Duration (Mins), and Median Duration (Mins)**. All columns are sortable.

The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

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- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

- Selecting Print generates a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option allows export to Excel.

Help Text displayed for Timings Report on the Detailed Report section:



16. Work Outstanding Report

The Regional Manager can generate the Work Outstanding report from the Reports page of ANGIE. This report provides information on the work that is outstanding based on the criticality.

Work Outstanding Report – All Tasks

After selecting the **Work Outstanding** option from the Report Name dropdown, the **Task** dropdown consisting of **All Tasks**, **Applications (AP)**, **Application (SI)**, **Case Changes**, **Document Reviews**, **Recertifications**, and **All Tasks Export** will display. The screen below shows **All Tasks** selected. The Regional Manager will then see the **Select Retrieve Criteria** section and must select an option from the **Approaching Date Range** dropdown consisting of **Next 7 days**, **This Month**, **Next Month**, and **Date Range**.

The screen below shows **Next Month** selected.

The screenshot shows a web interface titled "Reports". Under the heading "Select Report", there are two dropdown menus: "Report Name" with "Work Outstanding" selected and "Task" with "All Tasks" selected. Below this is the "Select Retrieve Criteria" section, which includes three fields: "Approaching Date Range" with "Next Month" selected, "Date From" with "10/02/2020" and a calendar icon, and "Date To" with "10/06/2020" and a calendar icon. At the bottom of the form are three green buttons: "HIDE CRITERIA", "X CLEAR CRITERIA", and "✓ RETRIEVE REPORT".

Note:

- When the **Task** filter is set as **Applications (AP)**, the Regional Manager must have an additional filter of **File Date** that allows them to set the date range of SNAP file dates for the report output.
- When the **Task** filter is set as **Applications (SI)**, the Regional Manager must have an additional filter of **Task Due Date** that allows them to set the date range of due dates for the report output.
- When the **Task** filter is set as **Recertifications**, the Regional Manager must have an additional filter of **Interview Month** that allows them to set the date range of the interview month for the report output. Note that a full month date range must be selected (beginning of a month and end of a month), as the Recertification data is based on the Interview Month cohort and NOT the actual month the client conducted their Recertification interview.
- When the **Task** filter is set as **Case Changes**, the Regional Manager must have an additional filter of **Submission Date** that allows them to set the date range of the interview month for the report output.
- When the **Task** filter is set as **Document Reviews**, the Regional Manager must have an additional filter of **Submission Date** that allows them to set the date range of the interview month for the report output.
- When the **Task** filter is set as **All Tasks** or **All Tasks Export**, the Regional Manager must have the **Date From** and **Date To** range filter, which is applied as follows:
 - For Applications in AP status, this range is used as the File Date retrieval range.
 - For Applications in SI status, this range is used as the Task Due Date retrieval range.
 - For Recertifications, the full interview month(s) for the selected dates is used for the retrieval.

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 ANGIE Release 1 Notes

- For Case Changes, this range is used as the Submission Date retrieval range.
 - For Document Reviews, this range is used as the Submission Date retrieval range.
- Selecting the **Retrieve Report** button displays the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page. The default view of this report will hide the criteria as seen below.

Reports

[SHOW CRITERIA](#)

Detailed Report - Work Outstanding (All Tasks) Approaching Date 11/2/2020 - 11/8/2020, Date 10/2/2020 - 10/8/2020

[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Potential Work	Open Task	Deferred	E.S. Ready to Assign									
				ESHAP	RFI	No Def	FTK	Core Docs	Opt Docs	No Docs	Sup Ret	Error Corr	
All Tasks	255	98	96	145									
Today	0	12	12	29									
Approaching	255	23	21	45									
Urgent	0	7	7	14									
Backlog	0	56	56	57									

Reports

[SHOW CRITERIA](#)

Detailed Report - Work Outstanding (All Tasks) Approaching Date 11/2/2020 - 11/8/2020, Date 10/2/2020 - 10/8/2020

[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Sup. Ready to Assign			Total Open Work	Transmitted to WMS			Pending in WMS		
	Error Corr	AAP	Total		Supervisor Xmit	Direct Xmit	Total	Supervisor Xmit	Direct Xmit	Total
All Tasks	107			446	377					
Today	16			69	82					
Approaching	27			116	61					
Urgent	8			36	50					
Backlog	56			225	184					

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Reports

[SHOW CRITERIA](#)

Detailed Report - Work Outstanding (All Tasks) Approaching Date 11/2/2020 - 11/8/2020, Date 10/2/2020 - 10/8/2020

[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Pending in WMS			Completed							
	Supervisor Xmit	Direct Xmit	Total	AC	RJ	CL	Dup App	WD	No Change	CC	Total
All Tasks	377		225								
Today	82		45								
Approaching	61		49								
Urgent	50		41								
Backlog	184		90								

- Click the **Show Criteria** button to display the screen below.

Reports

Select Report

Report Name: Task:

Select Retrieve Criteria

Approaching Date Range: Date From: Date To:

[HIDE CRITERIA](#) [CLEAR CRITERIA](#) [RETRIEVE REPORT](#)

Detailed Report - Work Outstanding (All Tasks) Approaching Date 11/2/2020 - 11/8/2020, Date 10/2/2020 - 10/8/2020

[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Potential Work	Open Task	Deferred	E.S. Ready to Assign							
				ESHAP	RFI	No Def	FTK	Core Docs	Opt Docs	No Docs	Sup Rat
All Tasks	255	98	96	345							
Today	0	12	12	29							
Approaching	255	23	21	45							
Urgent	0	7	7	14							
Backlog	0	56	56	57							

Based on the option selected from the Task dropdown, the report will provide the information for the same as seen in the above screen. Since **All Tasks** was selected, information for All Tasks will be displayed within the Task column of the Detailed Report. The report further breaks down All Tasks across data rows consisting of:

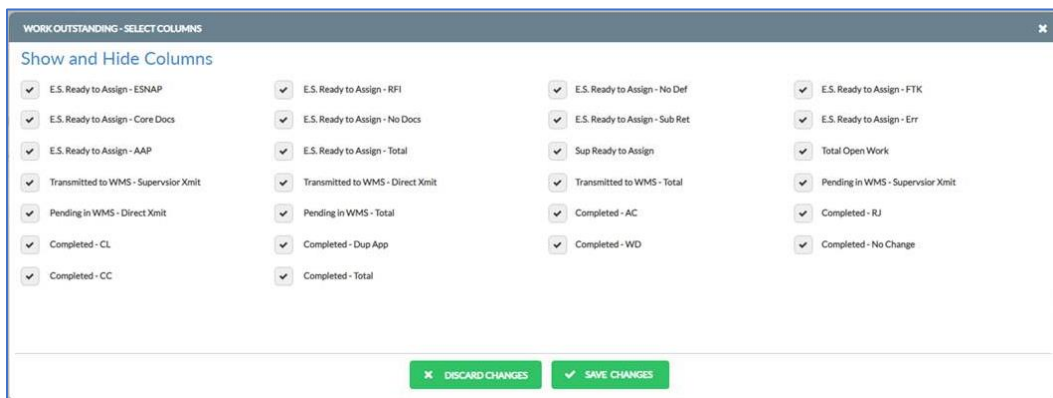
- Today** - Priority Date Today
- Approaching** - Coming Due with priority Date in selected date range
- Urgent** - Late, past Priority Date before Task Due Date
- Backlog** - Overdue, past Task Due Date

The horizontal Scroll bar allows the Regional Manager to scroll horizontally. The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report):

- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen above.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Regional Manager to select columns, print, and export the data:

- Selecting Print generates a PDF file with the on-screen report output. Selected columns will appear in the printed output.
- The Export option allows export to Excel.
- Upon clicking the **Select Columns** button, a modal window will display for the Regional Manger to choose the desired columns for the report as seen below. **Save changes** will apply only to the selected columns of the report.



Work Outstanding Report – Application (AP)

- After selecting the **Work Outstanding** option from the Report Name dropdown, the **Task** dropdown consisting of **All Tasks**, **Applications (AP)**, **Application (SI)**, **Case Changes**, **Document Reviews**, **Recertifications**, and **All Tasks Export** will display. The screen below shows **Applications (AP)** selected. The Regional Manager will then see the **Select Retrieve Criteria** section and must select an option from the **Approaching Date Range** dropdown consisting of **Next 7 days**, **This Month**, **Next Month**, and **Date Range**. The screen below shows **Next Month** selected.

The screenshot shows a web interface for generating reports. It is titled "Reports" and has a sub-section "Select Report". Under "Select Report", there are two dropdown menus: "Report Name" (set to "Work Outstanding") and "Task" (set to "Applications (AP)"). Below this is a section "Select Retrieve Criteria" with three date range filters: "Approaching Date Range" (set to "This Month"), "SNAP File Date From" (set to "10/02/2020"), and "SNAP File Date To" (set to "10/08/2020"). At the bottom of the criteria section are three buttons: "HIDE CRITERIA", "X CLEAR CRITERIA", and "✓ RETRIEVE REPORT".

Note:

- When the Task filter is set as **Applications (AP)**, the Manager must have an additional filter of **File Date** that allows them to set the date range of SNAP file dates for the report output
- When the **Task** filter is set as **Applications (SI)**, the Regional Manager must have an additional filter of **Task Due Date** that allows them to set the date range of due dates for the report output.
- When the **Task** filter is set as **Recertifications**, the Regional Manager must have an additional filter of **Interview Month** that allows them to set the date range of the interview month for the report output. Note that a full month date range should be selected (beginning of a month and end of a month), as the Recertification data is based on the Interview Month cohort and NOT the actual month the client conducted their Recertification interview.
- When the **Task** filter is set as **Case Changes**, the Regional Manager must have an additional filter of **Submission Date** that allows them to set the date range of the interview month for the report output.
- When the **Task** filter is set as **Document Reviews**, the Regional Manager must have an additional filter of **Submission Date** that allows them to set the date range of the interview month for the report output.
- When the **Task** filter is set as **All Tasks** or **All Tasks Export**, the Regional Manager must have the **Date From** and **Date To** range filter, which is applied as follows:
 - For Applications in AP status, this range is used as the File Date retrieval range.
 - For Applications in SI status, this range is used as the Task Due Date retrieval range.
 - For Recertifications, the full interview month(s) for the selected dates is used for the retrieval.
 - For Case Changes, this range is used as the Submission Date retrieval range.
 - For Document Reviews, this range is used as the Submission Date retrieval range.

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- Selecting the **Retrieve Report** button displays the **Detailed Report** section. The report will be displayed within the **Detailed Report** section of the page. The default view of this report will hide the criteria as seen below.

Reports

[SHOW CRITERIA](#)

Detailed Report - Work Outstanding (Applications-AP) Approaching Date 11/2/2020 - 11/8/2020, SNAP File Date 10/2/2020 - 10/8/2020

[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Potential Work	Open Task	Deferred	E.S. Ready to Assign									
				ESNAP	RFI	No Def	FTK	Core Docs	Opt Docs	No Docs	Sup Ret	Error Corr	
Applications (AP)	0	8	6	35									
Today	0			17									
Approaching	0	8	6	30									
Urgent	0			7									
Backlog	0			1									

Reports

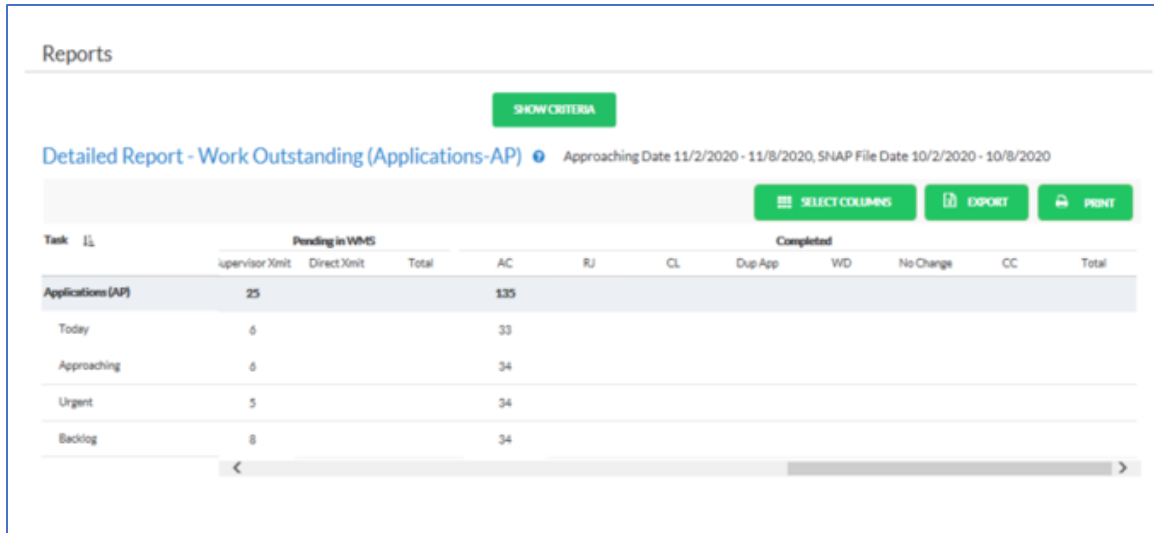
[SHOW CRITERIA](#)

Detailed Report - Work Outstanding (Applications-AP) Approaching Date 11/2/2020 - 11/8/2020, SNAP File Date 10/2/2020 - 10/8/2020

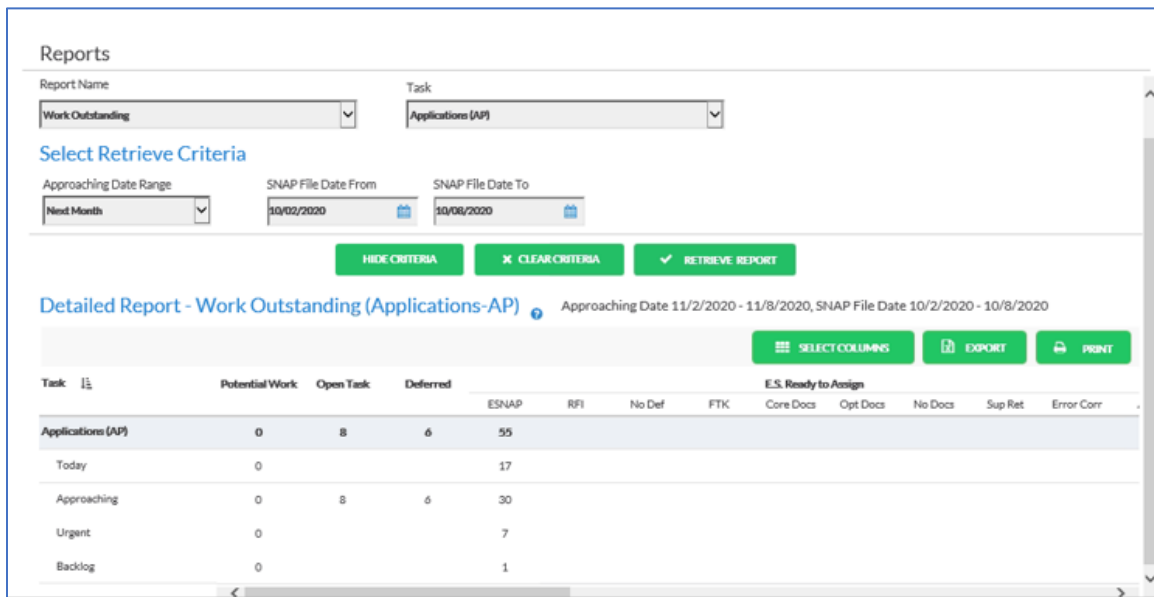
[SELECT COLUMNS](#) [EXPORT](#) [PRINT](#)

Task	Sup. Ready to Assign			Total Open Work	Transmitted to WMS			Pending in WMS	
	Sup Ret	Error Corr	AAP		Supervisor Xmit	Direct Xmit	Total	Supervisor Xmit	Direct Xmit
Applications (AP)				17	86			25	
Today				4	21			6	
Approaching				12	56			6	
Urgent				1	8			5	
Backlog				0	1			8	

Attachment E Regional Manager & Business Administrator Roles
 ANGIE Release 1 Notes



Click the **Show Criteria** button to display the screen below.



Based on the option selected from the Task dropdown, the report will provide the information for the same as seen in the above screen. Since **Applications (AP)** was selected, information for **Applications (AP)** will be displayed within the Task column of the Detailed Report. The report further breaks down **Applications (AP)** across data rows consisting of:

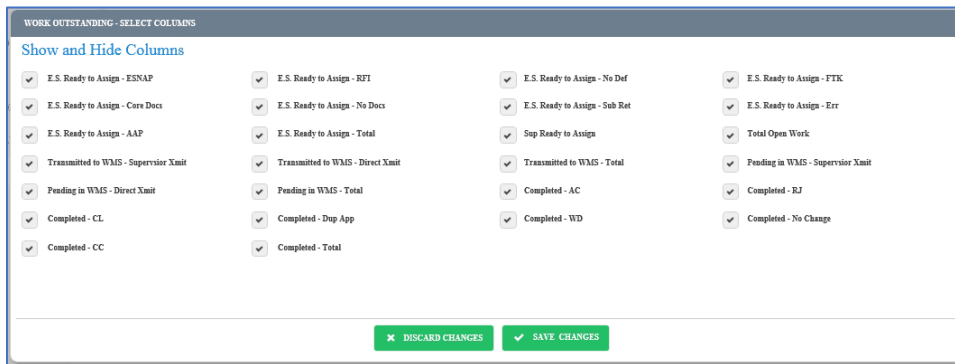
- **Today** - Priority Date Today
- **Approaching** - Coming Due with priority Date in selected date range
- **Urgent** - Late, past Priority Date before Task Due Date
- **Backlog** - Overdue, past Task Due Date

The horizontal Scroll bar allows the Regional Manager to scroll horizontally. The Regional Manager will be able to hide (the filter criteria), clear (the filter criteria), and retrieve (the report).

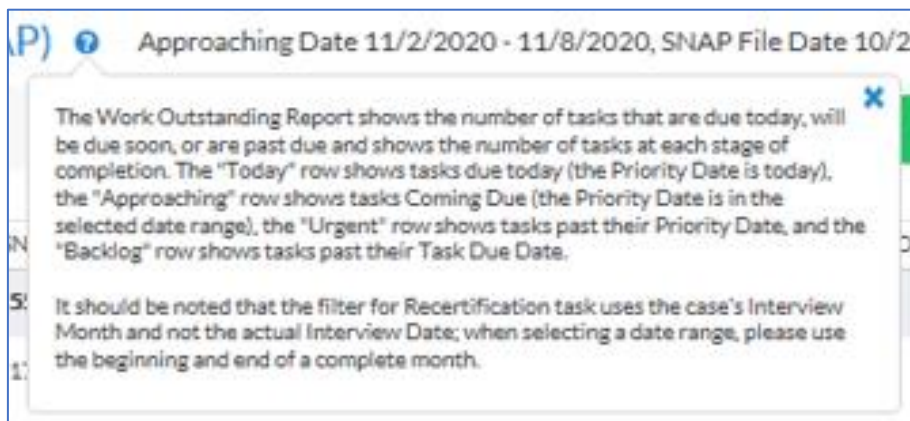
- The selected criteria will be displayed with the report title.
- Once the report is run, the filter criteria will collapse, but still exist as a line of text that shows the Regional Manager what filter criteria was specified as seen.
- The Regional Manager will be able to show/hide the filter criteria at the top of each report.

The report has additional functions that allow the Regional Manager to select columns, print, and export the data.

- Selecting Print should generate a PDF file with the on-screen report output. Selected columns should appear in the printed output. The Export option should allow export to Excel.
- Upon clicking the **Select Columns** button, Manager will be displayed with a modal window to choose the desired columns for the report as seen below. **Save changes** will apply only the selected columns to the report.



Help Text displayed for the Work Outstanding report within the Detailed Report section:

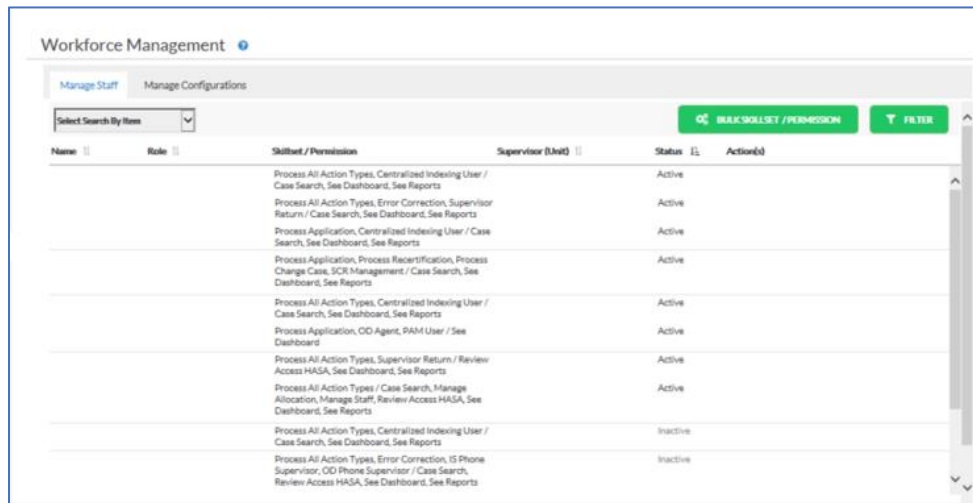


17. Business Administrator: Workforce Management

Regional Managers and Managers with a skillset of **Business Administrator** will have access to the new **Workforce Management** option in the left navigation pane, with **both tabs enabled** (Manage Staff, Manage Configurations).

The **Workforce Management** access is also controlled by 2 specific skillsets for a Role that is **NOT** marked with the **Business Administrator** skillset:

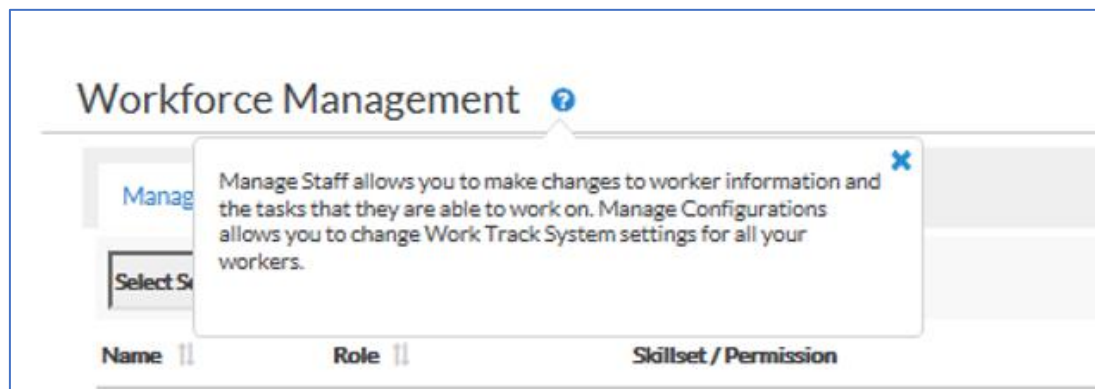
- **Manage Staff** - This interface allows updates to staff information in terms of Name, Role, Supervisor (Unit), Status, Skillset, and Permission. Access is controlled through the skillset of **Manage Staff**. This skillset provides access to the Workforce Management Interface using the navigation bar in ANGIE.
- **Manage Configurations** - This interface allows changes to configuration menus and values. Access is controlled through the skillset of **Manage Configurations**. This skillset provides access to the Workforce Management Interface using the navigation bar in ANGIE.



The screenshot shows the 'Workforce Management' interface. At the top, there are two tabs: 'Manage Staff' and 'Manage Configurations'. Below the tabs is a search bar labeled 'Select Search By Item' and two buttons: 'BULK/SKILLSET / PERMISSION' and 'FILTER'. The main content is a table with the following columns: Name, Role, Skillset / Permission, Supervisor (Unit), Status, and Actions. The table contains several rows of data, each representing a staff member with their respective details.

Name	Role	Skillset / Permission	Supervisor (Unit)	Status	Actions
		Process All Action Types, Centralized Indexing User / Case Search, See Dashboard, See Reports		Active	
		Process All Action Types, Error Correction, Supervisor Return / Case Search, See Dashboard, See Reports		Active	
		Process Application, Centralized Indexing User / Case Search, See Dashboard, See Reports		Active	
		Process Application, Process Recertification, Process Change Case, SCR Management / Case Search, See Dashboard, See Reports		Active	
		Process All Action Types, Centralized Indexing User / Case Search, See Dashboard, See Reports		Active	
		Process Application, OD Agent, PAM User / See Dashboard		Active	
		Process All Action Types, Supervisor Return / Review Access HASA, See Dashboard, See Reports		Active	
		Process All Action Types / Case Search, Manage Allocation, Manage Staff, Review Access HASA, See Dashboard, See Reports		Active	
		Process All Action Types, Centralized Indexing User / Case Search, See Dashboard, See Reports		Inactive	
		Process All Action Types, Error Correction, IS Phone Supervisor, OD Phone Supervisor / Case Search, Review Access HASA, See Dashboard, See Reports		Inactive	

Help Text for the Workforce Management Page:



18. Business Administrator: Manage Staff

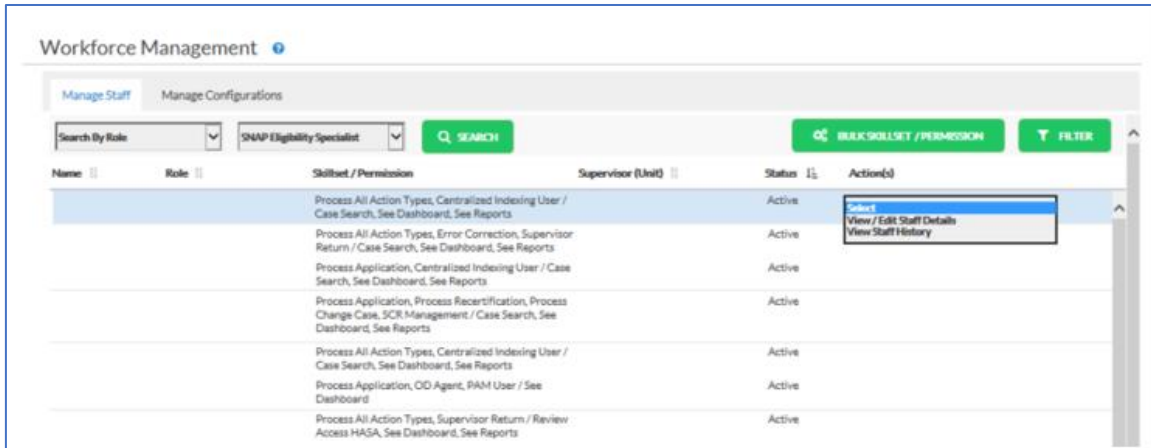
The **Manage Staff** tab allows the Business Administrator to make updates to the staff in terms of their Name, Role, Supervisor (Unit), Status, Skillset, and Permission.

Name	Role	Skillset / Permission	Supervisor (Unit)	Status	Action(s)
		Process All Action Types, Centralized Indexing User / Case Search, See Dashboard, See Reports		Active	
		Process All Action Types, Error Correction, Supervisor Return / Case Search, See Dashboard, See Reports		Active	
		Process Application, Centralized Indexing User / Case Search, See Dashboard, See Reports		Active	
		Process Application, Process Recertification, Process Change Case, SCR Management / Case Search, See Dashboard, See Reports		Active	
		Process All Action Types, Centralized Indexing User / Case Search, See Dashboard, See Reports		Active	
		Process Application, OO Agent, PAM User / See Dashboard		Active	
		Process All Action Types, Supervisor Return / Review Access HASA, See Dashboard, See Reports		Active	
		Process All Action Types / Case Search, Manage Allocation, Manage Staff, Review Access HASA, See Dashboard, See Reports		Active	
		Process All Action Types, Centralized Indexing User / Case Search, See Dashboard, See Reports		Inactive	
		Process All Action Types, Error Correction, IS Phone Supervisor, OO Phone Supervisor / Case Search, Review Access HASA, See Dashboard, See Reports		Inactive	

The Business Administrator can search by **Staff Name**, **Role**, or **Skillset/Permission** to generate a more refined search result. The search results are displayed within the grid.

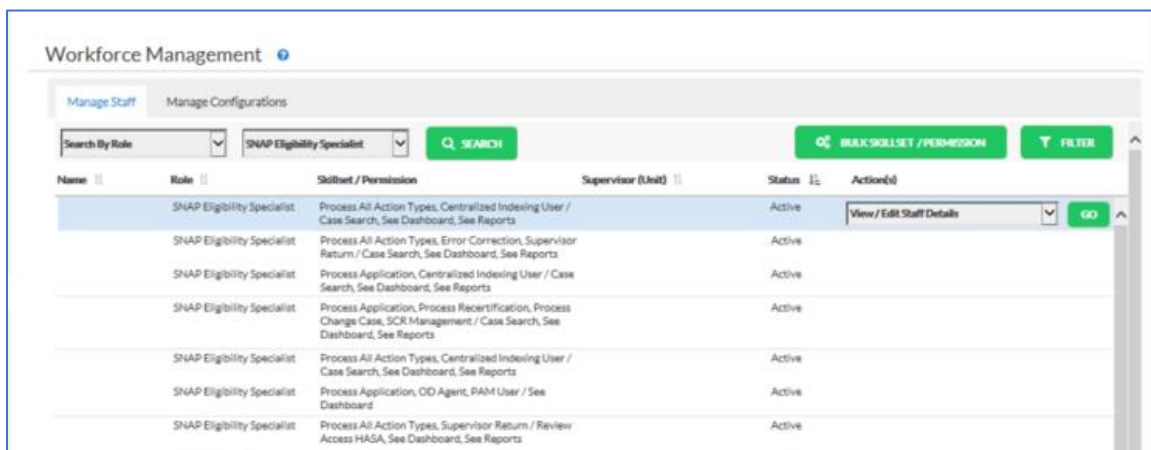
- If **Search by Staff Name** is selected from dropdown, the Business Administrator must enter the desired staff name and select the **Search** button to generate the result.
- If **Search by Role** is selected from dropdown, the Business Administrator will see a Role dropdown consisting of SNAP Eligibility Specialist, SNAP Supervisor, SNAP Manager, SNAP Regional, and Clerical Associate. Selecting the desired Role and then clicking the **Search** button will generate the result within the grid.
- If **Search by Skillset/Permission** is selected from the dropdown, the Business Administrator will see a Skillset/Permission dropdown and must select the desired Skillset/Permission. Selecting the desired Skillset/Permission and then clicking the **Search** button will generate the result within the grid.

From the grid, the Business Administrator must select the desired row to gain access to the options within the corresponding **Action(s)** dropdown consisting of **View Edit Staff Details** and **View Staff History**. Selecting the row will highlight that row. After selecting the desired action, the Business Administrator can select the **Go** button to view the corresponding modal window.



19. Business Administrator: View/Edit Staff Details

- To view and edit Staff details, the Business Administrator must select the row from the Manage Staff grid and then select the option **View/Edit Staff Details** from the Action(s) dropdown as seen below. The selected row will be highlighted within the grid.



After selecting the **View Edit Staff Details** within **Action(s)** and the **Go** button will result in the modal window displaying (as shown below) allowing the Business Administrator to make changes to the respective Staff's personal information. This interface allows making updates to the Name, Role, Supervisor (unit), Status, Skillset, and Permission. The changes will be applied upon selecting the **Save Changes** button.

Skillset allows the Role to perform a task or action in SPOS whereas **Permission** allows the Role to access certain features within ANGIE (e.g., Reports, workforce management, Case Search etc.) A default set of Skillsets and Permissions are maintained in a table-driven manner at the level of each role and processing group (e.g. Role's center). This default set of Skillsets and Permissions can be updated through table updates. New users receive this default set of Skillsets and

Attachment E Regional Manager & Business Administrator Roles ANGIE Release 1 Notes

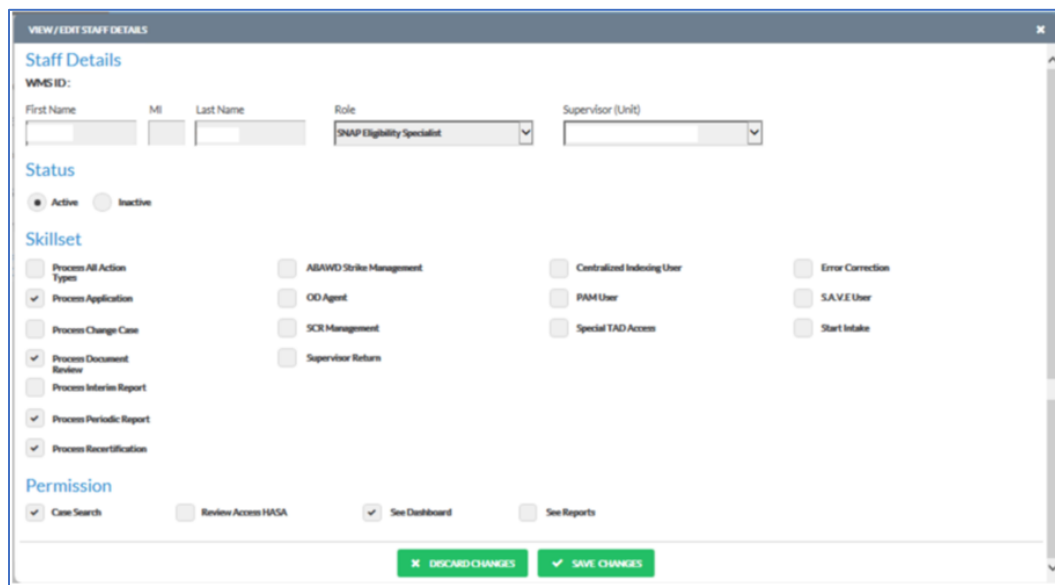
Permissions when they are added in ANGIE. Skillset and Permission values can be updated by a Business Administrator or by a staff person with the permission to Manage Staff.

The default set of skillsets and permissions does not override the values assigned to staff who already exists in ANGIE.

All updates that are made within the ANGIE system are also reflected within the POS Enrollment Special Rights, such that access is maintained and in sync across systems.

Note:

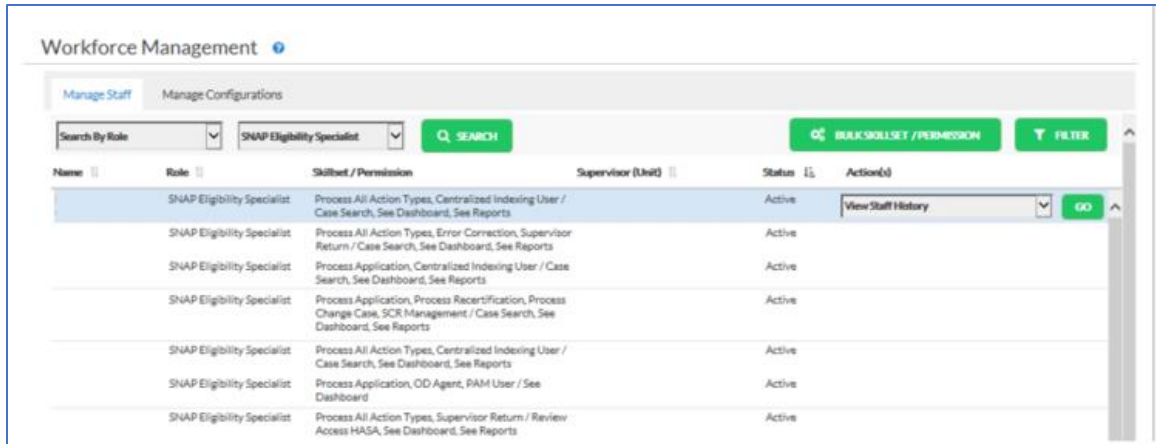
- Changes to Personnel data in POS enrollment are reflected in ANGIE Manage Staff.
- Changes to Demographic, Title and Supervisor made in ANGIE are reflected in POS enrollment.
- There will be a 15 minute delay on updates between POS and ANGIE.



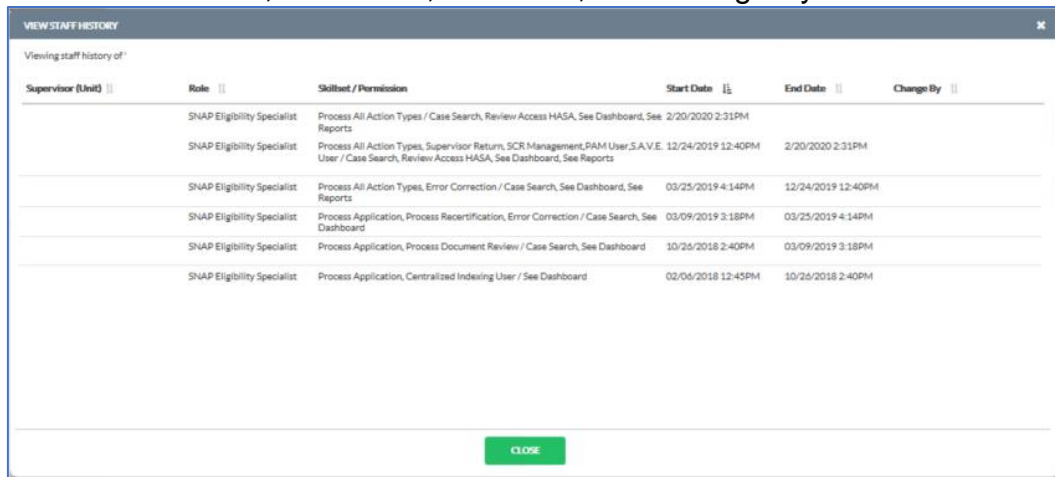
20. Business Administrator: View Staff History

To view the Staff history, the Business Administrator must select the row from the Manage Staff grid and then select the option **View Staff History** from the Action(s) dropdown as seen below. The selected row will be highlighted within the grid.

Attachment E Regional Manager & Business Administrator Roles
 ANGIE Release 1 Notes

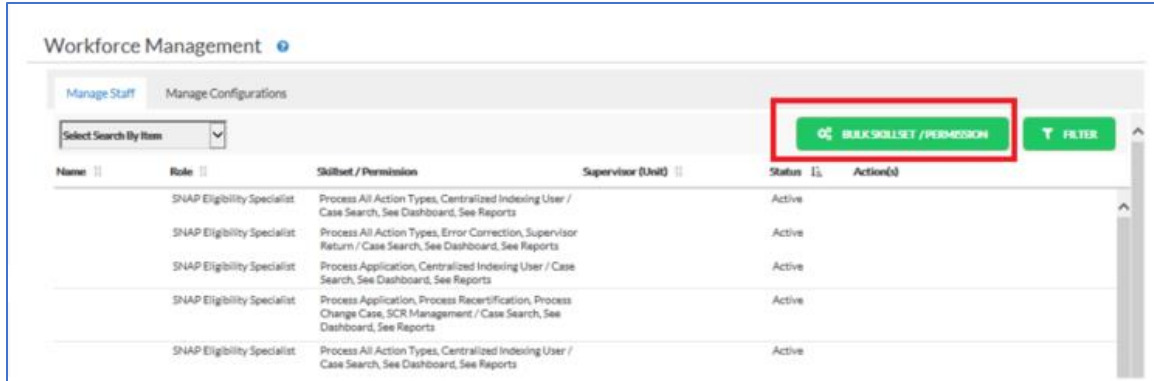


Selecting **View Staff History** within **Action(s)** and then the **Go** button will result in the modal window displaying the complete staff history of the respective Staff as seen below. The information displayed includes Supervisor (Unit), Role, Skillset/Permission, Start Date, End Date, and Change By.



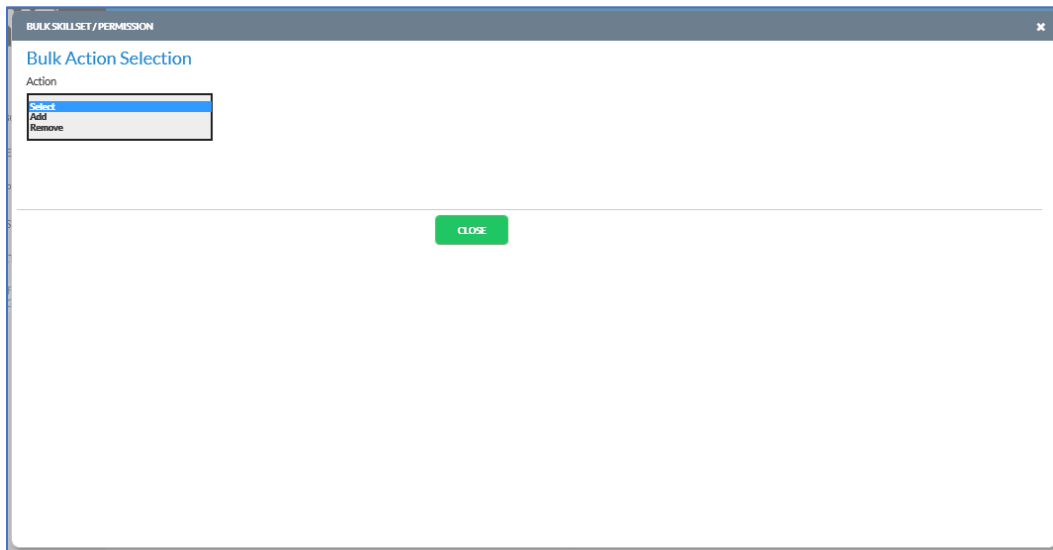
21. Business Administrator: Bulk Skillset/Permission

The Business Administrator has the capability to simultaneously **Add** or **Remove** a **Skillset** or **Permission** in bulk to multiple Eligibility Specialists, Supervisors, Managers, or Regional Managers when selecting the **Bulk Skillset / Permission** button found in the **Manage Staff** tab of **Workforce Management** page.



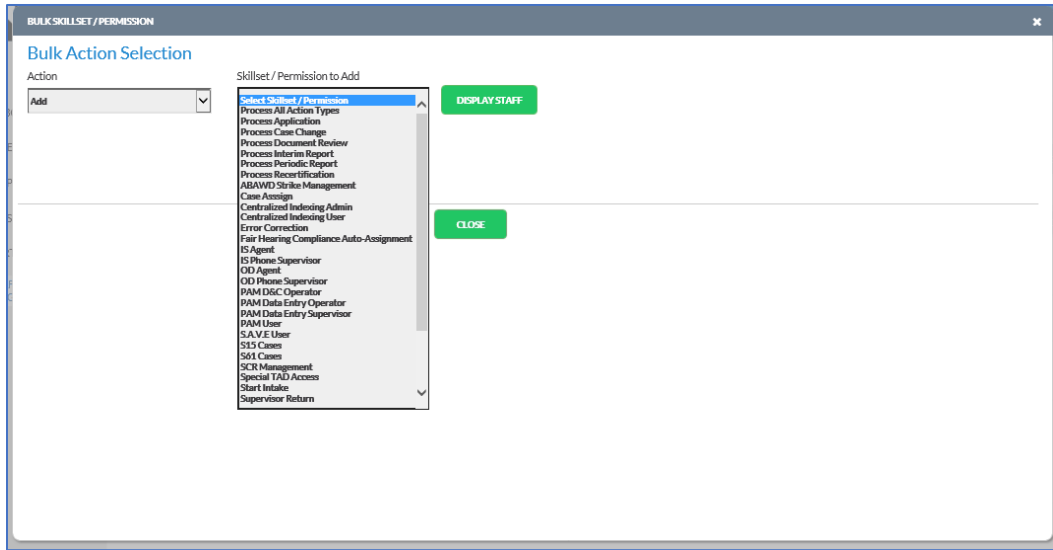
Add-Bulk Skillset / Permission

- Clicking the Bulk Skillset/Permission button from the Manage Staff page will display the modal window as seen below.

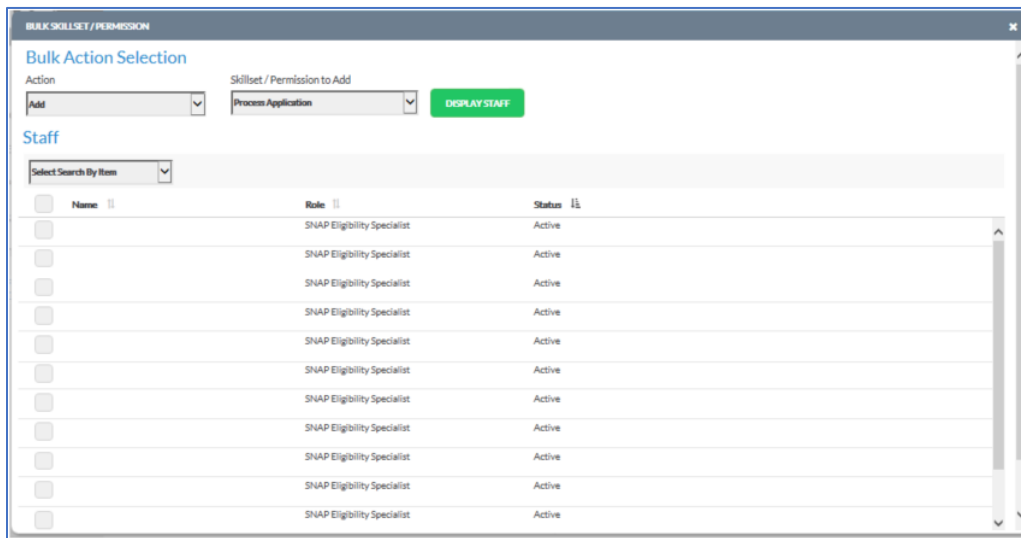


The Business Administrator must select from the **Action** dropdown consisting of **Add** and **Remove**. **Add** is selected in the screen below. Consequently, **Skillset/Permission to Add** dropdown is displayed. The Business Administrator must select an option from **Skillset / Permission** dropdown to **Add**.

Attachment E Regional Manager & Business Administrator Roles
 ANGIE Release 1 Notes



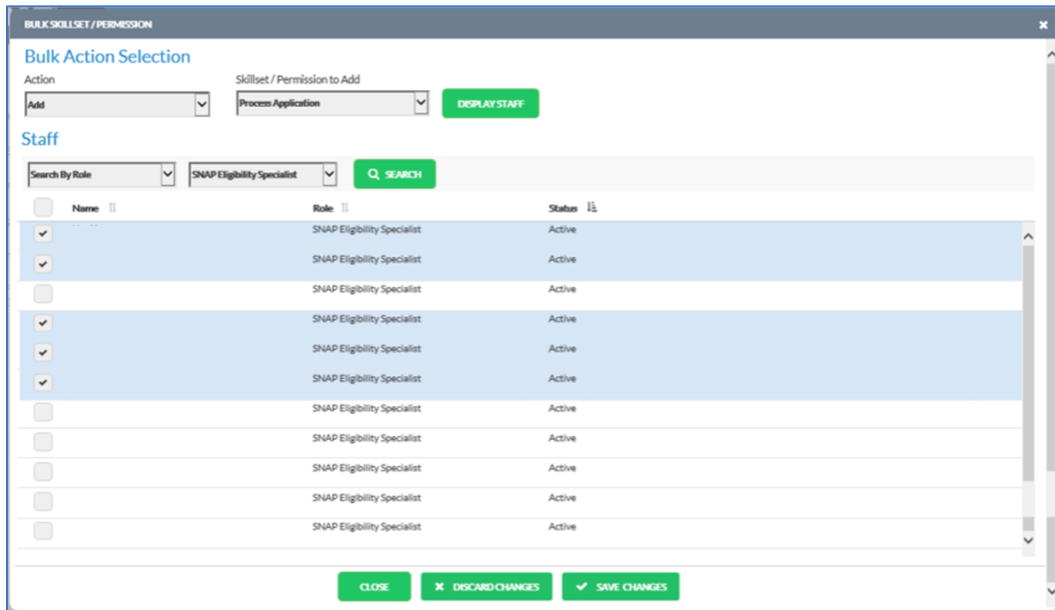
- After selecting an option from the Skillset / Permission to Add dropdown, selecting the **Display Staff** button will result in the display of the **Staff** section as seen below. The sortable columns displayed within the Staff section include Name, Role and Status.



Within the Staff section, the Business Administrator can further refine the search results **By Staff Name** or **By Role**:

- Selecting **Search By Staff Name** will display a name field requiring the Business Administrator to enter the Name of the desired Staff. Selecting the Search button will display the corresponding results.
- Selecting **Search By Role** will display a dropdown requiring the Business Administrator to select the Role consisting of **SNAP Eligibility Specialist**, **SNAP Supervisor**, **SNAP Manager**, **SNAP Regional**, **Clerical** and

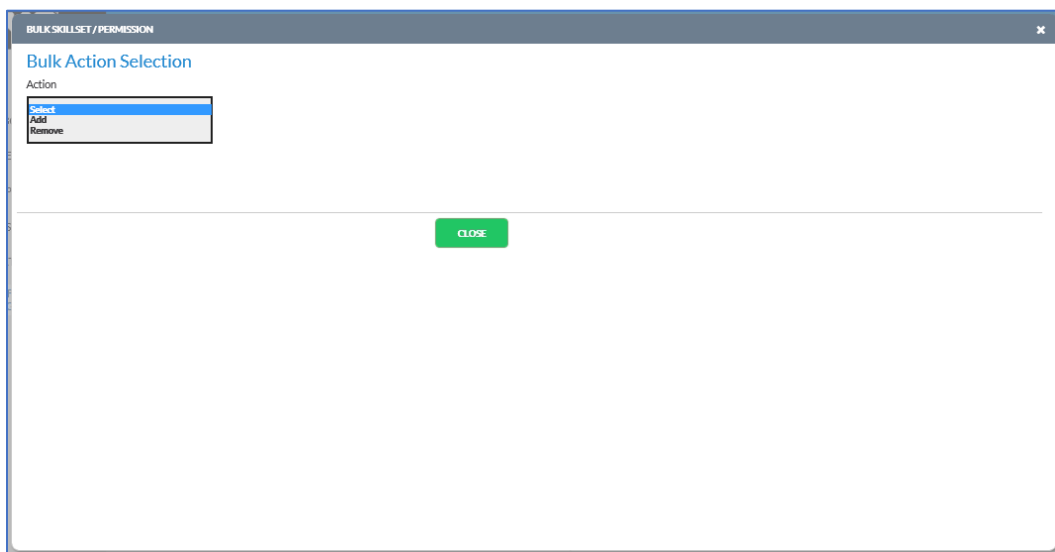
Associate. Selecting the Search button will display the corresponding results as seen below.



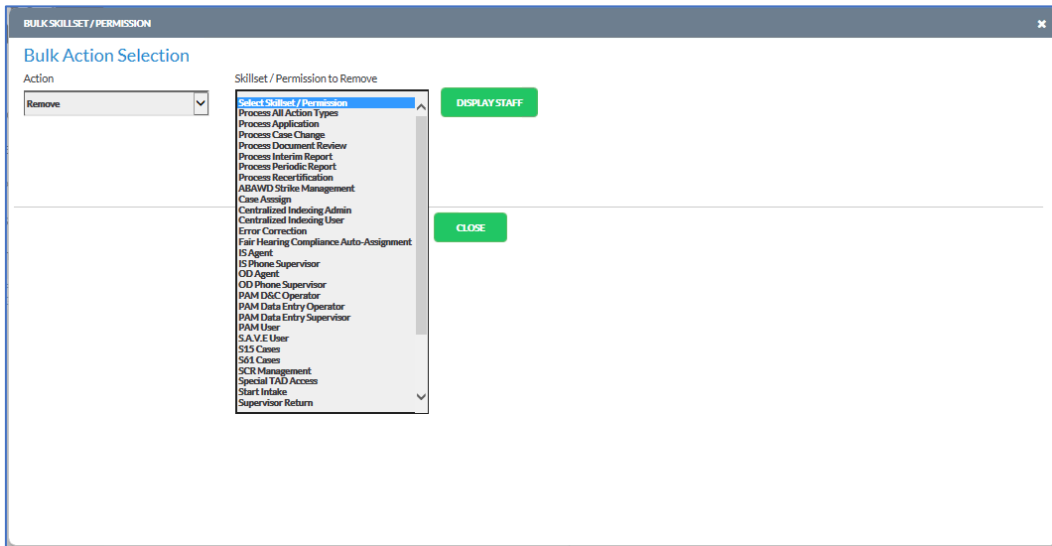
- Selecting the checkbox at the Name column header will display all search results. The Business Administrator can select multiple rows. Selecting **Save Changes** will **Add** the selected Skillset or Permission for the chosen Eligibility Specialists, Supervisors, Managers, or Regional Managers.

Business Admin: Remove-Bulk Skillset / Permission

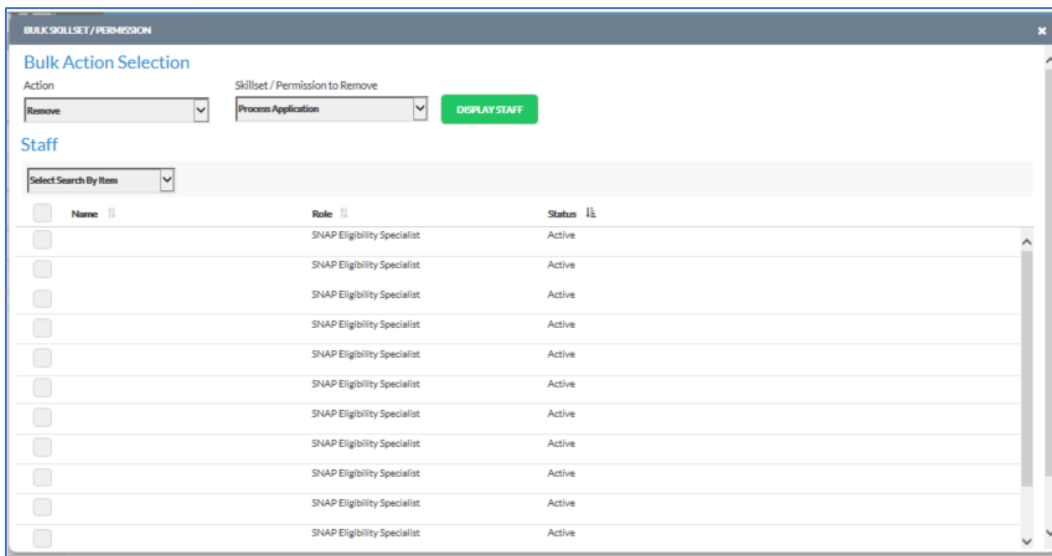
- Clicking the Bulk Skillset/Permission button from the Manage Staff page will display the modal window as seen below.



The Business Administrator must select an option from **Skillset / Permission** dropdown to **Remove**.



After selecting an option from the Skillset / Permission to Remove dropdown, select the **Display Staff** button which will result in the display of the **Staff** section as seen below. The sortable columns displayed within the Staff section include Name, Role and Status.

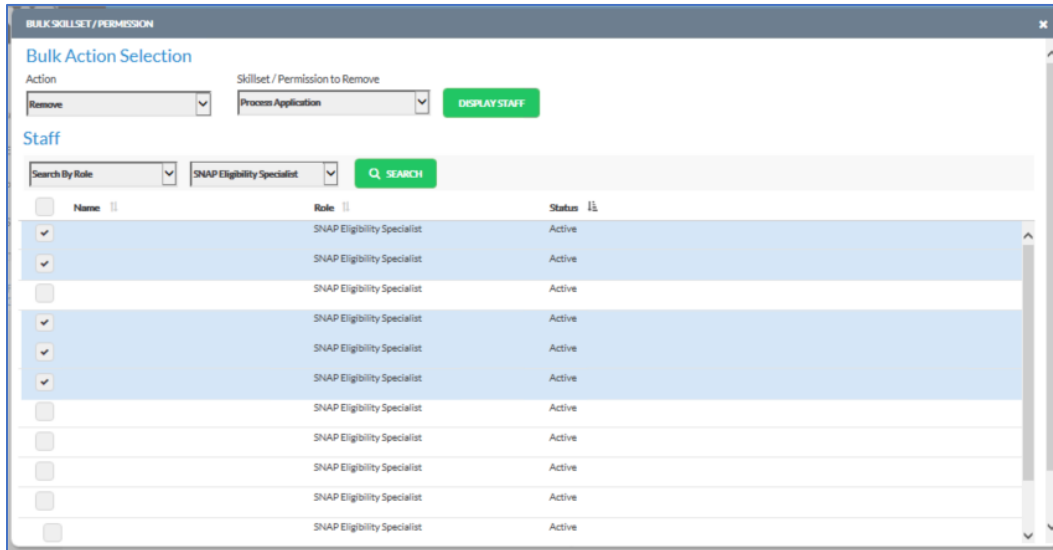


Within the Staff section, the Business Administrator can further refine the search results **By Staff Name** or **By Role**:

- Selecting **Search By Staff Name** will display a name field requiring the Business Administrator to enter the Name of the desired Staff. Selecting the Search button will display the corresponding results.

Attachment E Regional Manager & Business Administrator Roles
ANGIE Release 1 Notes

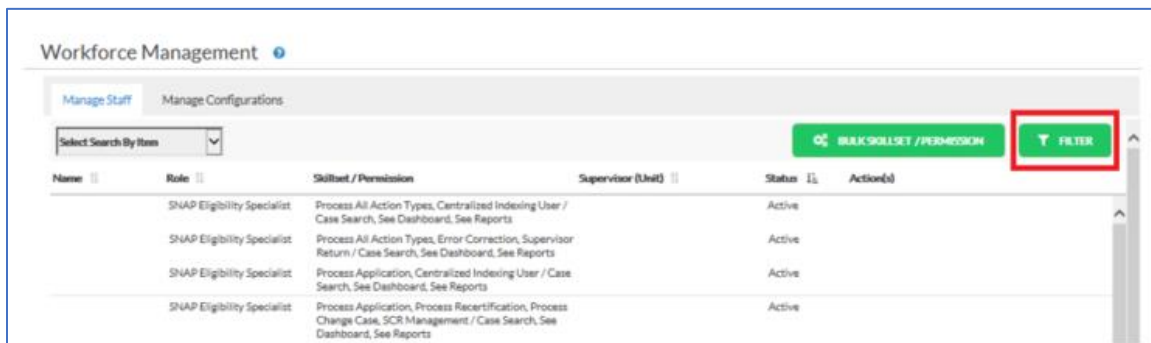
- Selecting **Search By Role** will display a dropdown requiring the Business Administrator to select the Role consisting of **SNAP Eligibility Specialist, SNAP Supervisor, SNAP Manager, SNAP Regional, Clerical** and **Associate**. Selecting the Search button will display the corresponding results as seen below.



- Selecting the checkbox at the Name column header will display all search results. The Business Administrator can select multiple rows. Selecting **Save Changes** will **Remove** the selected Skillset or Permission for the selected Eligibility Specialists, Supervisors, Managers, or Regional Managers.

22. Business Administrator: Filter

The **Filter** button is displayed on the **Manage Staff** tab of Workforce Management page as seen below.



The **Filter Modal Window** is displayed when the **Filter** button is clicked as seen below. This screen will allow the Business Administrator to further refine the search results by Staff Status, Staff Skillset, or by Staff Permission. This Filter modal window consists of **Staff Status, Staff Skillset, and Staff Permission** sections.

The Business Administrator can select any of the checkboxes displayed on the screen. Selecting the **Apply** button will apply the filtered criteria to the search results grid on the Manage Staff page.

The screenshot shows a 'FILTER' dialog box with the following sections:

- Staff Status:** Active, Inactive
- Staff Skillset:** A grid of 16 checkboxes including: Process All Action Types, Process Application, Process Change Case, Process Document Review, Process Interim Report, Process Periodic Report, Process Recertification, ABAWD Strike Management, Centralized Indexing User, IS Agent, OD Phone Supervisor, PAM Data Entry Supervisor, S15 Cases, Special TAD Access, Case Assign, Error Correction, IS Phone Supervisor, PAM D&C Operator, PAM User, S61 Cases, Start Intake, Centralized Indexing Admin, Fair Hearing Compliance Auto-Assignment, OD Agent, PAM Data Entry Operator, SAVE User, SCR Management, and Supervisor Return.
- Staff Permission:** Case Search, Manage Configurations, Manage Staff, Review Access HASA, See Dashboard, See Reports

At the bottom of the dialog are three buttons: **DISCARD CHANGES** (with an 'X' icon), **CLEAR FILTER** (with an 'X' icon), and **APPLY** (with a checkmark icon).

23. Business Administrator: Manage Configurations

This interface allows changes to configuration menus and values. Access is controlled through the skillset of **Manage Configurations**. This skillset provides access to the Workforce Management Interface using the navigation bar in ANGIE. Any changes made within the Manage Configurations tab take effect the next day.

The Business Administrator can update the fields for **FTK Day for Application** and **Hold Time (hours)** on this screen directly:

- **FTK Day for Application** refers to the number of days when a client must begin the interview or else the case will be marked as FTK (Fail to Keep).
- **Hold Time (hours)** refers the number of hours a piece of work can be put on hold. Once the hold time is reached for a particular work, it will be sent back to the prioritized list.

Attachment E Regional Manager & Business Administrator Roles
ANGIE Release 1 Notes

Workforce Management

Manage Staff Manage Configurations

Last modified on 01/31/2020 01:11 PM by

FTK Day for Application 20

Hold Time (hours) 2

Hold Reasons Restroom, Break

Return Reasons End of Shift, Leaving Sick, Weather Emergency, Leaving Personal (Planned), Leaving Personal (Unplanned)

Optional Ready To Assign Events

Application RFL/IVS/SDIX Received

Recertification RFL/IVS/SDIX Received

Mandated/Core Verification Full

BACK TO DASHBOARD DISCARD CHANGES SAVE CHANGES

- Selecting the Pencil icon for **Hold reasons**, **Return Reasons**, and **Optional Ready to Assign Events** will result in the corresponding modal windows.
- Selecting the **Hold Reasons Pencil icon** (above screen) will display the modal window showing the Currently established Hold Reasons in ANGIE as seen below. The **Edit Reasons** section of below modal window shows the available Hold options that the Business Administrator can choose from. The selections made can be saved by selecting the **Save Changes** button.

EDIT HOLD REASONS

Last modified on 01/31/2020 01:11 PM by

Current Edit Reasons

Hold Reasons Hold Reasons

Restroom, Break Restroom Break Lunch

The new changes will be applied on 06/11/2020

DISCARD CHANGES SAVE CHANGES

- Selecting the **Return Reasons edit icon** will display the modal window showing the Currently established Return Reasons in ANGIE. The **Edit Reasons** section of below modal window shows the available Return options that the Business

Administrator can choose from. The selections made can be saved by selecting the **Save Changes** button.

EDIT RETURN REASONS

Last modified on 01/31/2020 01:11 PM by

Current

Return Reasons
End of Shift, Leaving Sick, Weather Emergency, Leaving Personal (Planned), Leaving Personal (Unplanned)

Edit Reasons

Return Reasons

<input checked="" type="checkbox"/> End of Shift	<input checked="" type="checkbox"/> Leaving Sick	<input checked="" type="checkbox"/> Weather Emergency
<input checked="" type="checkbox"/> Leaving Personal (Planned)	<input checked="" type="checkbox"/> Leaving Personal (Unplanned)	<input type="checkbox"/> Conflict of Interest
<input type="checkbox"/> Expired Hold (System Generated)		

The new changes will be applied on 06/11/2020

- Selecting the **Optional Ready To Assign Events** icon will display the modal window for the currently established Ready To Assign Events for Application and Recertification in ANGIE. The **Edit Events** section of below modal window shows the available Ready To Assign Events for Application and Recertification that the Business Administrator can choose from. The selections made can be saved by selecting the **Save Changes** button.

EDIT OPTIONAL READY TO ASSIGN EVENTS

Last modified on 01/31/2020 01:11 PM by

Current

Application
RFI/IVS/SDX Received

Recertification
RFI/IVS/SDX Received

Edit Events

Application

<input type="checkbox"/> Start Interview	<input checked="" type="checkbox"/> RFI/IVS/SDX Received
--	--

Recertification

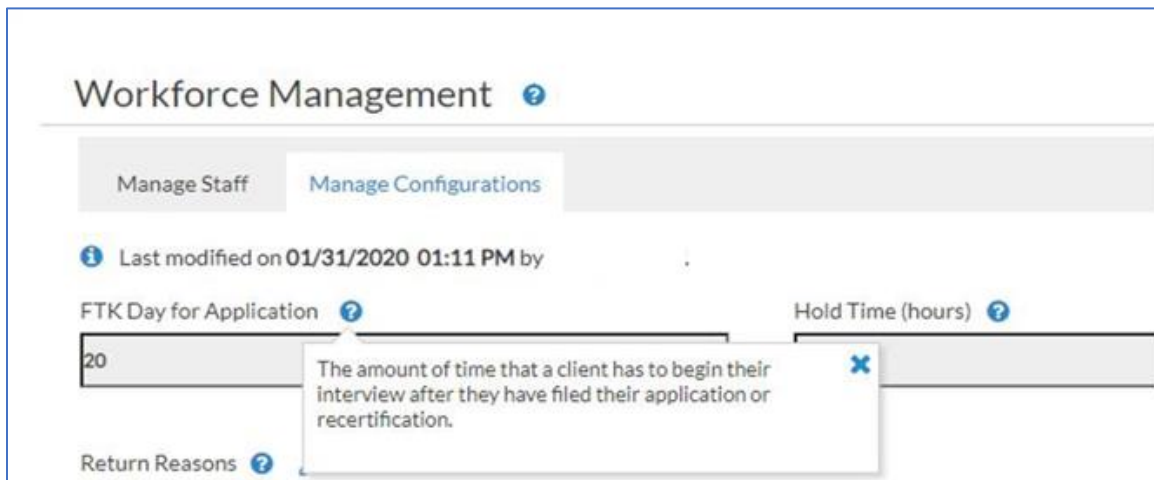
<input type="checkbox"/> Start Interview	<input checked="" type="checkbox"/> RFI/IVS/SDX Received
--	--

The new changes will be applied on 06/11/2020

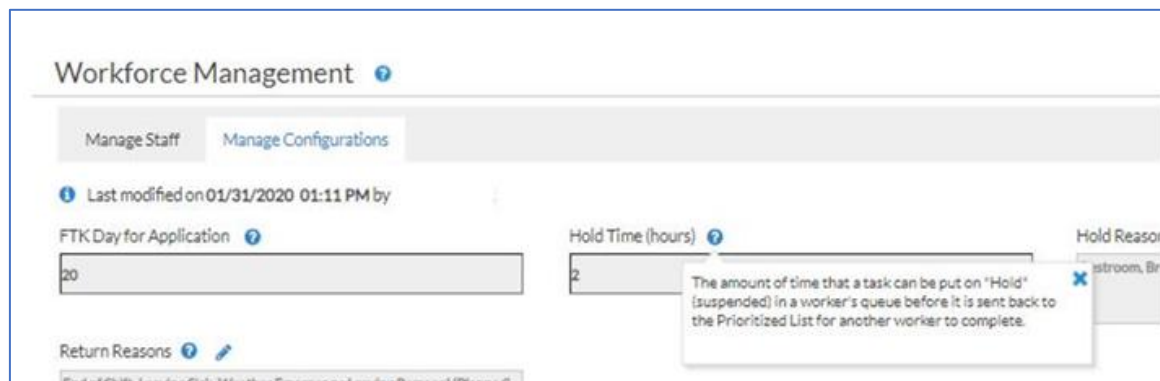
The **Mandated/Core Verification** is a dropdown on the main Manage Configurations page that allows the Business Administrator to choose between **Full** or **Partial**:

- If **Full** is selected, then all mandated documents must be submitted before the task is Ready to Assign.
- If **Partial** is selected, then some but not all mandated docs are submitted before the task is Ready to Assign.
- To apply the changes, the Business Administrator must select the **Save Changes** button of the main **Manage Configurations** page. Any changes made within the Manage Configurations tab will not take into effect until next day.

Help Text for FTK Day for Application:

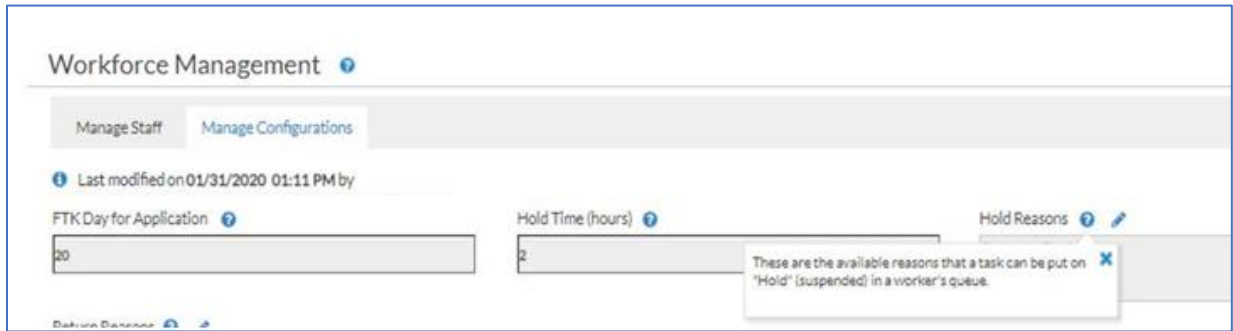


Help Text for Hold Time (hours):

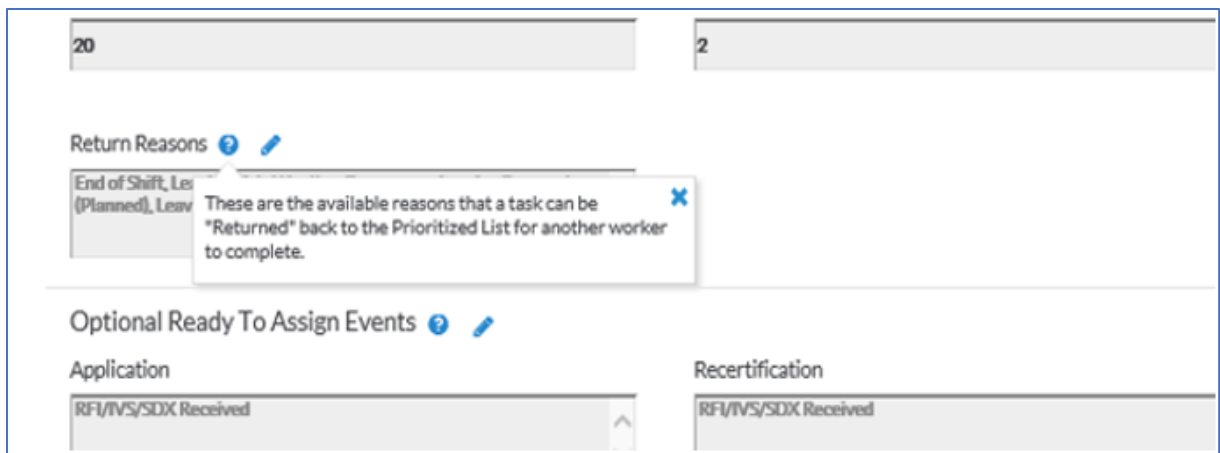


Attachment E Regional Manager & Business Administrator Roles
ANGIE Release 1 Notes

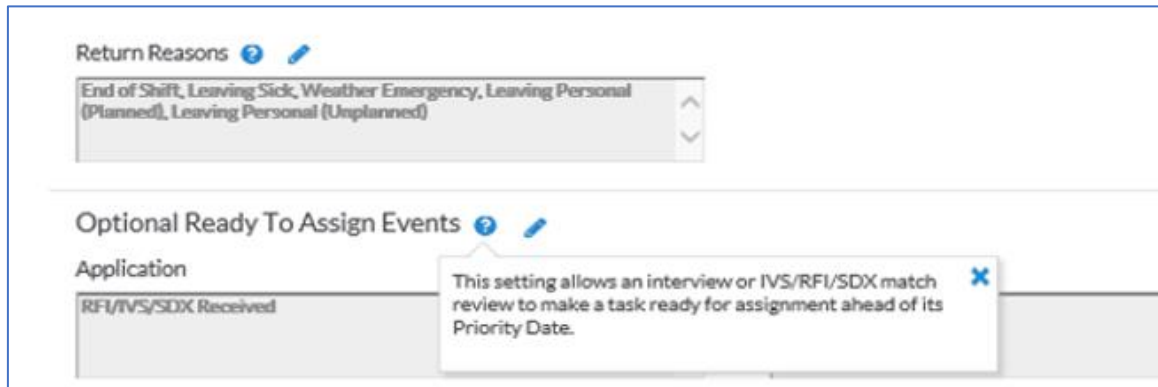
Help Text for Hold Reasons:



Help Text for Return Reasons:



Help Text for Optional Ready To Assign Events:



Attachment E Regional Manager & Business Administrator Roles
ANGIE Release 1 Notes

Help Text for Mandated/Core Verification:

The screenshot shows a configuration interface titled "Optional Ready To Assign Events" with a blue information icon and a pencil icon. It features three tabs: "Application", "Recertification", and "Mandated/Core Verification". The "Application" tab is active, showing a dropdown menu with the text "RFI/IVS/SOX Received". The "Recertification" tab also shows a dropdown menu with the text "RFI/IVS/SOX Received". The "Mandated/Core Verification" tab is selected, displaying a help text box that reads: "This setting will determine if all mandated documentation must be submitted before the task can be assigned when the client was deferred for verification." Below the tabs are three green buttons: "BACK TO DASHBOARD", "DISCARD CHANGES", and "SAVE CHANGES".

Glossary Document for ANGIE

ANGIE Documentation

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1. Document Purpose

This document provides definitions of common definitions, terminology and concepts for the Activity and General Information Exchange (**ANGIE**).

2. ANGIE

ANGIE replaces the Classic Paperless Office System (POS) reports, queues and action menus used to assign work to Supplemental Nutrition Assistance Program (SNAP) Staff. ANGIE is a workforce management and task assignment tool.

3. User Roles and Skillsets

Staff is assigned to user roles. ANGIE support the following user roles:

- Eligibility Specialist (ES)
- Supervisor
- Manager
- Regional Manager & Business Administrator
- Reviewer

Skillsets allow SNAP business administrators to make adjustments to task assignments based on specific needs and circumstances.

For example, specific staff may be exclusively assigned to applications in order to address an increase in application submissions.

4. Tasks

Tasks represent the critical business processes for SNAP cases. A task is the highest description of work assigned, approved and processed within ANGIE and SPOS.

In Release 1, ANGIE logically groups the work for SNAP into four types of tasks:

- **Application** – Cases in Applying (AP) or Single Issue (SI) status in Welfare Management System (WMS); this includes the processing of Expedited SNAP (ESNAP) determinations and benefits.
- **Recertification** – Cases that must complete a recertification interview
- **Change Case** – Cases in Active (AC) status that submit changes
- **Document Review** – Cases in AC status that submit documents and do not have an open recertification or change case.

5. Task Statuses

The status is used to determine the progress of each task. Each task has a status as it moves through its workflow. Possible statuses include:

- **New** – Newly received applications and recertifications.
- **Interview** – Cases where the interview was started.
- **Pending** – Cases deferred for verification.
- **Ready to Assign** – Cases that are ready for assignment based on the priority and skillsets.
- **Processing** – Cases that are being processed by a Worker or pending finalization of WMS processing.
- **Supervisory** – Cases that require Supervisor or Manager approval.
- **Complete** – This is the final status for a task and indicates that the work is completed.

6. Activities

Once the task is distributed by ANGIE or started through the case search tool, the work is completed in the Streamlined Paperless Office System (SPOS). ANGIE opens SPOS for the appropriate activity based on the assignment or selection. After completing or suspending the activity in SPOS, staff returns to ANGIE for their next task.

7. Hold and Returns

ANGIE allows staff to **hold** an assigned task for a pre-determined period, by selecting a reason for the hold. This allows the staff person to return to the same task that was assigned.

ANGIE allows staff to **return** an assigned task on which they cannot work. The staff must select a valid reason from the list for the return.

Staff can also select a hold or return reason when suspending an activity in SPOS.

8. Universal Processing and Prioritization

Staff in ANGIE works from a shared common list of ready tasks, which are assigned by ANGIE based on priority dates and helps prevent backlogs. This universal processing pool of work removes the need to individually access in the queue to assess the readiness of the task.

The list is organized by priority date, ready to assign date, document status and other attributes, with the oldest tasks given the highest priority. This prioritization is based on business rules and attributes that drive the logic. Tasks are distributed by ANGIE once they are ready to assign.

9. Events

Events are components of a status. They provide a historical view of a case and task, representing steps such as starting an activity, completing of an interview, deferring for verification, starting processing, approval by a Supervisor, and other such examples.

10. Types of Events for Application

Task	Status	Event
Application	New	App Reg Access Human Resources Administration (AHRA)
Application	New	App Reg - In Center
Application	New	Assign Application
Application	New	Document Indexed
Application	New	Document Submitted
Application	Interview	Complete Interview - Deferred for Verification
Application	Interview	Complete Interview - No Deferral
Application	Interview	Document Indexed
Application	Interview	Document Submitted
Application	Interview	Started from Case Search
Application	Interview	Started from Get Next
Application	Interview	Suspend Interview
Application	Ready to Assign	Adverse Action Pause
Application	Ready to Assign	ESNAP Ready
Application	Ready to Assign	ESNAP Returned by Supervisor
Application	Ready to Assign	ESNAP Returned by WMS - Error Correction
Application	Ready to Assign	Mandated Verification Not Received by Due Date
Application	Ready to Assign	Mandated Verification Received - Full
Application	Ready to Assign	No Deferral
Application	Ready to Assign	No Interview Completed - Failed to Keep (FTK)
Application	Ready to Assign	Returned by Supervisor
Application	Ready to Assign	Returned by WMS - Error Correction
Application	Ready to Assign	Resource File Integration/Information Verification Service (RFI/IVS/SDX) Received
Application	Ready to Assign	Supervisor Review Required
Application	Pending	Deferred for RFI/IVS/SDX
Application	Pending	Deferred for RFI/IVS/SDX and Verification
Application	Pending	Deferred for Verification
Application	Pending	Document Indexed
Application	Pending	Document Submitted
Application	Processing	Assign Application
Application	Processing	Assign Eligibility Decision
Application	Processing	Assign FTK Application
Application	Processing	Complete Processing
Application	Processing	Complete RFI/IVS/SDX Review
Application	Processing	Continued to Processing
Application	Processing	Document Indexed
Application	Processing	Document Submitted
Application	Processing	ESNAP Processing

Attachment F Glossary Document for ANGIE
Release 1 Notes

Application	Processing	ESNAP SCR - Selective Case Review
Application	Processing	Selective Case Review sent to WMS
Application	Processing	Started from Case Search
Application	Processing	Started from Get Next
Application	Processing	Suspend ESNAP Processing
Application	Processing	Suspend Processing
Application	Processing	Suspend Processing - Deferred for Verification
Application	Processing	WMS Clock Down: xxx
Application	Supervisory	Complete ESNAP Supervisor Review
Application	Supervisory	Complete Supervisor Review
Application	Supervisory	Document Indexed
Application	Supervisory	Document Submitted
Application	Supervisory	ESNAP: Ineligible
Application	Supervisory	ESNAP: Sent to WMS
Application	Supervisory	ESNAP: Single Issuance
Application	Supervisory	Sent to WMS
Application	Supervisory	Start ESNAP Supervisor Review
Application	Supervisory	Start Supervisor Review
Application	Supervisory	Started from Case Search
Application	Supervisory	Started from Get Next
Application	Supervisory	Suspend ESNAP Supervisor Review
Application	Supervisory	Suspend Supervisor Review
Application	Complete	Active: [\$ Benefit Issuance Amount]
Application	Complete	Closed: WMS Code xxx
Application	Complete	ESNAP: Active
Application	Complete	Forced Closed by WMS; Case Reason Code 968
Application	Complete	Rejected
Application	Complete	Withdrawn / Purged in WMS

11. Types of Events for Recertification

Task	Status	Event
Recertification	New	Added to Recertification List from WMS
Recertification	New	Assign Recertification
Recertification	New	Created by Recert File
Recertification	New	Document Indexed
Recertification	New	Document Submitted
Recertification	New	Submitted via AHRA
Recertification	Interview	Complete Interview - Deferred for Verification
Recertification	Interview	Complete Interview - No Deferral
Recertification	Interview	Document Indexed
Recertification	Interview	Document Submitted
Recertification	Interview	Started from Case Search
Recertification	Interview	Started from Get Next
Recertification	Interview	Suspend Interview
Recertification	Ready to Assign	Adverse Action Pause

Attachment F Glossary Document for ANGIE
Release 1 Notes

Recertification	Ready to Assign	Mandated Verification Not Received by Due Date
Recertification	Ready to Assign	Mandated Verification Received - Full
Recertification	Ready to Assign	No Deferral
Recertification	Ready to Assign	No Interview Completed - Manual FTK
Recertification	Ready to Assign	No Interview Completed - System FTK
Recertification	Ready to Assign	No Recert Received by Due Date - System FTK
Recertification	Ready to Assign	Returned by Supervisor
Recertification	Ready to Assign	Returned by WMS - Error Correction
Recertification	Ready to Assign	RFI/IVS Received
Recertification	Ready to Assign	Supervisor Review Required
Recertification	Pending	Deferred for RFI/IVS/SDX
Recertification	Pending	Deferred for RFI/IVS/SDX and Verification
Recertification	Pending	Deferred for Verification
Recertification	Pending	Document Indexed
Recertification	Pending	Document Submitted
Recertification	Processing	Assign Recertification
Recertification	Processing	Complete Processing
Recertification	Processing	Complete RFI/IVS/SDX Review
Recertification	Processing	Continued to Processing
Recertification	Processing	Document Indexed
Recertification	Processing	Document Submitted
Recertification	Processing	Selective Case Review sent to WMS
Recertification	Processing	Started from Case Search
Recertification	Processing	Started from Get Next
Recertification	Processing	Suspend Processing
Recertification	Processing	Suspend Processing - Deferred for Verification
Recertification	Processing	WMS Clock Down: xxx
Recertification	Supervisory	Complete Supervisor Review
Recertification	Supervisory	Document Indexed
Recertification	Supervisory	Document Submitted
Recertification	Supervisory	Sent to WMS
Recertification	Supervisory	Start Supervisor Review
Recertification	Supervisory	Started from Case Search
Recertification	Supervisory	Started from Get Next
Recertification	Supervisory	Suspend Supervisor Review
Recertification	Complete	Active: [\$ Benefit Issuance Amount]
Recertification	Complete	Closed: WMS Code xxx
Recertification	Complete	Forced Closed by WMS; Case Reason Code 968

12. Types of Events for Change Case

Task	Status	Event
Change Case	Ready to Assign	Returned by Supervisor
Change Case	Ready to Assign	Returned by WMS - Error Correction
Change Case	Ready to Assign	Supervisor Review Required
Change Case	Pending	Document Indexed
Change Case	Pending	Document Submitted

Attachment F Glossary Document for ANGIE
Release 1 Notes

Change Case	Processing	Complete Processing
Change Case	Processing	Selective Case Review sent to WMS
Change Case	Processing	Started from Case Search
Change Case	Processing	Started from Get Next
Change Case	Processing	Suspend Processing
Change Case	Processing	WMS Clock Down: xxx
Change Case	Supervisory	Complete Supervisor Review
Change Case	Supervisory	Document Indexed
Change Case	Supervisory	Document Submitted
Change Case	Supervisory	Sent to WMS
Change Case	Supervisory	Start Supervisor Review
Change Case	Supervisory	Started from Case Search
Change Case	Supervisory	Started from Get Next
Change Case	Supervisory	Suspend Supervisor Review
Change Case	Complete	Closed: WMS Code xxx
Change Case	Complete	Forced Closed by WMS; Case Reason Code 968

13. Types of Events for Document Review

Task	Status	Event
Document Review	Ready to Assign	Document Indexed
Document Review	Processing	Complete Processing
Document Review	Processing	Started from Case Search
Document Review	Processing	Started from Get Next