LEAD TASK DEFINITIONS

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| Tasks | Definitions – Updated 3/31/2022 |
| **HELP QUEUE** | 1. Take calls from Help Queue. The leads on duty will be scheduled to take calls from both the EBD/Family HQ. The shifts are: AM = 8:00 – 12:15 and PM = 12:00 – 4:00.
2. Should the PRT lead seek for extra help to review new workers’ cases before confirmation, this PRT lead will share the cases with the HQ leads to help review and send back to the new worker (s).
3. Leads assigned to HQ will take escalated calls from the CCC workers when the CCC worker needs to escalate to a supervisor. If HQ lead is not able to de-escalate the situation, the HQ lead will be the one to escalate the customer to a supervisor. Depending on the situation, HQ leads may escalate the call to the supervisor of the case assigned worker, the supervisor of the CCC worker, or to the lead worker’s own supervisor to help determine where to escalate for any unclear circumstance.
4. CCC status – HQ calls are usually not back to back, there should be time between calls to research the problem and to get back to the worker within 24 hours to let the worker know that the issue has been resolved or inform them that it is still being researched. While on HQ duty, the proper statuses are:
* **Call Inbound**– currently on a call
* **Ready** - ready for another call
* **Not Ready - Last call** – restroom break
* **Not Ready – On Break** - when taking the AM/PM break **(email HQ leads**)

When it is necessary to use other CCC status not listed here, ***communicate*** with the other HQ leads to avoid everyone going off HQ at the same time. |
| **LISTS** | 1. The Lists Lead will determine the number of absent workers and assign the work to the rest of the leads scheduled for lists. When the volume is high and all leads have been utilized, coordinate with the Workload Management team to get more help. The priority order to get the absent workers (planned or unplanned) caught up:
	1. Pull 7/10/30 day (076 alerts) - complete all verification due alerts each day the worker is out.
	2. Pull docs, smrf, changes, renewals, and HC/FPW RFA applications as part of the daily coverage. Assuming the absent worker has everything (besides HC applications) caught up to within 2 business days.

 Note: HC/FPW applications that are 10 days old and initially appear on the Workload Report should be processed for any worker out 2+ days that is assigned to that lead.* 1. Split the lists among the List leads team and email it out to include Capital leads in the daily email.
	2. The absent workers can be found in the SharePoint calendar. The unplanned absences are emailed daily to Capital leads.
	3. Refer to the written instructions in Dane Share drive or on SharePoint for how to pull lists and how to distribute work among the leads.
	4. Lead workers should check the Daily Workload for oldest work item showing up for any worker assigned to them that is out two days or more as part of the daily priority to be completed.
	5. Additional coverage can be requested by the worker’s supervisor for anyone on an extended leave.

\*\*\*Note\*\*\*If the lead assigned to an absent worker sees that the worker is more than 2 days behind on their work and more than 10 days old on HC/RFA applications, and the lead will not be able to get them caught up, that lead will notify the worker’s supervisor for attention. That supervisor will need to make other arrangements to get the worker caught up. The lead assigned to that worker will continue to work on current items received during the worker’s absence to make sure it is within 2 business days and HC/RFA applications to within 10 days. |
| **OVERDUE VERIFICATION** | All Leads will watch the overdue items from the Daily Workload report for their own unit. Do not automatic process it unless asked by the unit supervisor. Unit Lead will bring the overdue items to the unit supervisor’s attention. |
| **PROBLEM RESOLUTION TEAM EMAIL INBOX** | 1. Managing the Capital PRT inbox for system and policy questions from Capital workers and supervisors. Send to State Help Desk if necessary and/or respond to workers/supervisors and/or fix the problem cases as necessary.
2. When the assigned unit supervisor or lead worker will both be out planned/unplanned or at meetings and needed help from other leads to monitor their new worker (s). That supervisor or lead for the new worker should communicate with PRT Inbox that their new worker (s) will send cases needed review before confirmation to PRT. Once PRT or HQ lead (s) reviewed the case, they will email the new worker (s) for confirmation.
	* The PRT inbox lead is the primary lead to review the new worker’s cases. This lead will seek help from HQ leads if extra help is needed. PRT lead or HQ lead will email the new worker when the case is ready for confirmation.
	* All leads provided assistance during this period should feel free to share your experience working with the new workers during time with their assigned lead worker and supervisor.

The Dane PRT Inbox lead is the back-up to the Dane Lobby lead to take action and assign the email request from Capital staff seeking a call back to handle Hmong and Spanish CC or EBD program. |
| **DANE LOBBY** | Lead lobby shifts are 7:45 AM – 12:15 PM and 12:00 PM – 4:30 PM.The Clerical team, front desk ESS staff, EA staff, and JCO lobby supervisor team can ask for help from lobby lead to:* Coordinate and get the On-Call-Lobby ESS to the front. Coordinate with CCC supervisor for addition ESS helper to the front when necessary.
* Do CC adds for W2
* Take care of BCP premiums (this included premium received in the mailroom)
* Monitor the “PRT mailbox” in the mailroom to process the earning/shelter verification dropped off by the W2/EA workers, and assign Drug Test results to OCL ESS worker to process into the case.
* Provide support to clerical when there is urgent need to do so.
* Help overseeing the lobby area

During lobby shift, lead should:* Make the initiate round to the front desk at 8:00 AM and 12:00 PM.
* Let them know you are the lobby lead for that shift.
* Remind them the about the above tasks.
* Remind them to email you when 1 of the FD ESS is taking a break.
* Make a round to the lobby at 4:00 to check out lobby lines and coordinate for more helpers.

The Lobby lead is the one to take action and assign the email request from Capital staff seeking a call back to handle Hmong and Spanish Dane CC and EBD program.  |
| **PARTNER LOBBY** | Partner leads provide lobby back up whenever the assigned main lobby worker needed assistance. |
| **COVERAGE**(CC appointment coverage) | Since FSOD implementation, each county is responsible to check for their own absent workers’ appointments and re-assign within their own county for coverage when necessary. Appointment coverage is no longer a shared duty for Capital leads. |
| **UNIT COVERAGE** | 1. Provide back up support to unit supervisor, including running reports and attending meetings for supervisor.
2. Emergency permission to leave (non-emergency needs to go to unit Sup) when no other supervisor can be found.
3. Act as the unit’s go to person for questions/problems solving when worker unable to get through to the Helpline.
4. Workers may ask for help with their daily lists or to fix a complicated case.
5. Provide overview or clarify ops memo and program policy with workers.
6. Bring to unit supervisor’s or Capital lead team’s attention any work falling behind from workers of your unit.
7. Attend fair hearing with workers if they need it.
8. Help arrange coverage for workers needing to leave urgently.
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| **OTHER MAJOR DUTIES; EACH INDIVIDUAL LEAD MAY BE RESPONSIBLE WITHIN THEIR COUNTY** | * Policy Coordinator
* CARES Coordinator
* Newborn Coordinator
* CS Good Cause assessment/determination (Dane/Sauk)
* ChildCare Coordinator
* CCC Administration back up
* Forms Coordinator
* EBT Vault Card Coordinator
* Transfer Coordinator
* Fraud/overpayment
* EVR Reports
* ACCESS Inbox Coordinator
* State Second Party Review Coordinator
* State FS/HC QC Coordinator
* Internal Targeted Case Review
* New Worker Training
* Develop Training materials
* Provide and present class room training
* Hold trainings/meetings/create agendas/take minutes
* Provide one-on-one training
* Provide Excel/Word expertise to those in need
* Coordinate Special Projects for consortium staff
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