

1. R4.0 Wrap-Up Needs Assessment Part 1

The Inbox Process Strategy Wrap-Up Needs Assessment is a tool used to understand the current business practices surrounding case processing. The information contained within this needs assessment will help OCDEL support CCISs with ongoing maintenance and wrap-up activities for Unification. The assessment is in two parts. The first contains a series of specific questions regarding communication, files, training and case processing. The second part will be conducted at a later date and is a more in-depth analysis and will require detailed information and tracking of data by each CCIS to help us better assist you.

Please answer the questions below by close of business Friday, August 17, 2007.

1. Which CCIS(s) do you represent?

2. Which phase of Release 4.0 was your CCIS included?

2. Training Environment Usage

Please answer the following questions based on your CCISs use of the Training Environment.

1. Do you currently use the Training Environment?

Yes

No

2. If yes, how do you use the Training Environment?

- Train new staff
- Train existing staff
- Refresher training for staff
- Research
- Practice

Other (please specify)

3. CCIS/CAO Communication

Please answer the following questions regarding CCIS/CAO Communication.

1. How often do you communicate with your CAO?

- Daily
- 2-3 times per week
- 1 time per week
- Bi-Weekly
- Less than bi-weekly
- Other (please specify)

2. How do you communicate with your CAO?

- Communication Log
- Email
- Phone
- Fax
- In person
- Other (please specify)

3. Do you have outstanding issues with your CAO?

- Yes
- No

If so, on average, what is the number of outstanding issues?

4. What is the turnaround time for receiving feedback from your CAO?

- Hours
- 1 Day
- > 1 Day
- 1 Week
- > 1 Week
- Other (please specify)

5. Do you have on-going meetings scheduled with your CAO?

- Yes

4. Forms and Files

Please answer the following questions regarding CCIS forms and physical case files.

1. What information do you collect for your physical case files?

2. What CCMIS and CIS screenshots are printed for case files?

3. At what point in the case's life cycle do you create the physical file (i.e. when the case appears in the CIS Inbox, when P/C contact is made, etc.)?

jm When the case appears in the CIS Inbox

jm When P/C contact is made within 5 days of appearing in the CIS Inbox

jm When the P/C responds to the Welcome Letter

Other (please specify)

4. Who in your office prepares the physical case files?

€ Intake Caseworker

€ CIS Inbox Manager

€ Caseworkers

€ Supervisors

Other (please specify)

5. What forms are utilized within your office when processing a case (i.e. self-certification form, other internal forms, etc.)?

5. Case Processing 1

Please answer the following questions regarding caseworkers and case processing.

1. How many caseworkers work in your CCIS office?

2. Are caseworkers in your office cross-trained?

Yes

No

3. How many of these caseworkers only work on Unification cases?

4. How many caseworkers work on LI/FT/HS cases?

5. What is your office's business practice for marking cases as 'Reviewed' in the CIS and Update Inbox?

Cases are marked as they are processed

All cases are processed and marked at the end of the day

Each caseworker has their own practice for marking cases as Reviewed

No business practice is currently established

Other (please specify)

6. Is your office able to process all cases in the CIS Inbox and Update Inbox within the 5 day rule?

Yes

No

If no, what business practice is in place to process any outstanding updates?

6. Case Processing 2

Please answer the following questions regarding detailed case processing.

1. What is the step-by-step process for completing a case (this includes from the time that the case appears in the Inbox to the time the case closes or remains in on-going mode)?

2. Do you schedule appointments for a specific time of day (i.e. all appointments in the morning for certain caseworkers...allowing them the afternoon to work cases and answer phones)?

Yes

No

Comments

3. How many appointments does a caseworker have on average in one day?

4. Does your office conduct group face-to-face appointments?

Yes

No

Comments



7. Additional Questions

Please answer the following additional questions.

1. Would your CCI S be interested in receiving additional system training?

Yes

No

If yes, what specific areas would you like to be trained on?



2. Release 4.0.6 has significant impacts on Inbox Processing. Would your CCI S be interested in receiving training for this new functionality?

Yes

No

3. Do you have any additional comments or questions?

