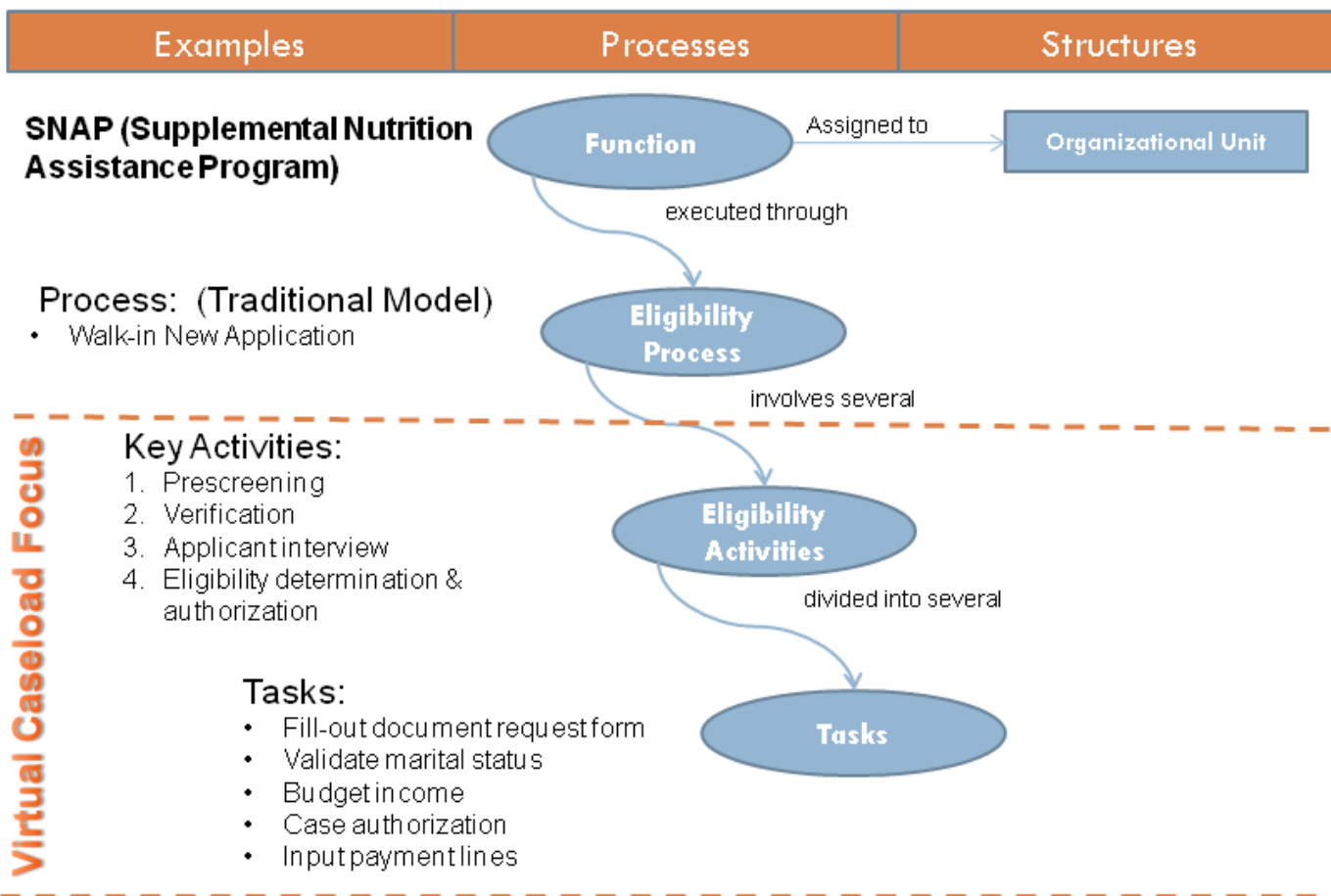


The Virtual Caseload

What is a Virtual Caseload?

A virtual caseload is one way to streamline your eligibility operations, promote equitable allocation of work, and improve organizational performance. The virtual caseload uses new methods of deploying staff, and managing: day-to-day eligibility operations, critical issues, caseloads, case records, document collection and workspaces. For example, instead of one worker processing a new application, a logically organized team of workers complete the eligibility work. Eligibility activities and tasks become compartmentalized so each unit or person is responsible for only one particular part of the eligibility workflow. Thus, the eligibility worker's focus is on completing an eligibility activity and not managing the process. The eligibility workflow and case records become streamlined and consistent so anyone can pick up a case record, find information, and complete an assigned activity. Another major advantage of the Virtual Caseload is that the eligibility work has built-in checkpoints throughout the workflow so errors are corrected before authorization. Sample eligibility activities are: Screening, Document collection, Interviewing, Telephone Coverage, and Eligibility Determination.



The Virtual Caseload

The “Work” is logically and efficiently arranged in units of activities or tasks (**Reduces complexity**)

- Similar to a manufacturing assembly line, the eligibility work is organized and managed at the activity or task level. The workers focus on completing an activity or task and do not worry about managing a caseload or multitasking. The work and necessary resources are brought to the worker so the worker can easily complete the activity or task.

The streamlined “Work” improves organizational communication and requires less time and effort (**Efficient**)

- Workspace, case records, policy, procedures and workflow become consistent and uniform. This increases organizational capacity and worker productivity. Anyone can find a case and begin working on an activity with little or no effort because there is no guess work involved in finding a case record or wondering how the case record documentations will be organized.

The “Work” moves efficiently from one team to another until the casework is complete (**Optimum workflow**)

- The caseload is managed by carefully constructing a workflow that optimizes and complements staff, technology and available workspace. Non-value added activities have been eliminated or reduced throughout the eligibility process.

The “Work” has built-in checkpoints throughout the workflow (**Accountable**)

- As the work progresses through the eligibility process, every stage of the eligibility process is dependent upon the previous work to have been done timely and correctly. When omissions or errors occur, they are quickly identified and corrected before authorization. To ensure accountability, there should be process measures and realistic outcomes for each activity or task. Worker performance standards should reflect current work expectations based on these realistic measures and outcomes.

The “Work” is adaptable and responsive to change (**Consistent and uniform**)

- Since the workflow as well as the case record are monitored, when unexpected bottlenecks occur the workers can easily pitch in and help. Many states have back-up staff assigned along with the employee assigned the activity so there is no guess work on who helps out when a particular activity such as telephone coverage is experiencing a peak need in service.

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