Getting Started in ImpaCT-For External Partners

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Introduction

This document is designed as a guide to assist you as you begin to work in the new ImpaCT system. In this guide you will find a compilation of resources to support your successful transition to ImpaCT. This guide will help to answer many of the questions you may have and provide guidance on situations that may arise on “Day One” in ImpaCT.

What to Expect on Day One of ImpaCT Go-Live

- Throughout implementation there will be numerous communications to staff
- There is an escalation process in place with clear direction on how to escalate the types of issues you may encounter.
- Worker Resources and Aids will be available for external staff on the ImpaCT Website.

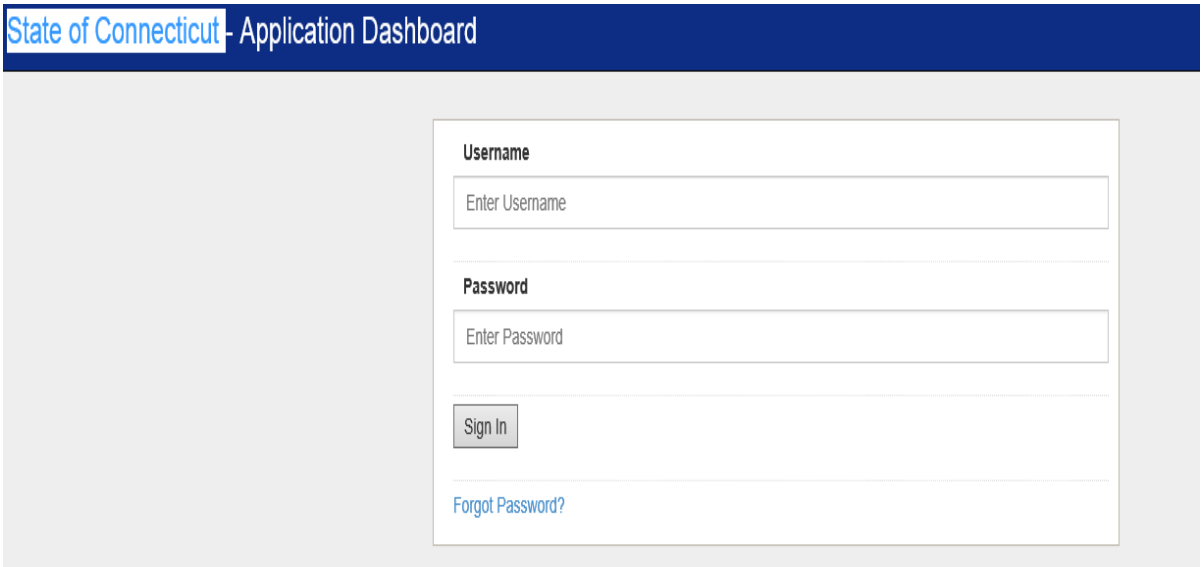
Getting Started in ImpaCT

Get into ImpaCT

In order to facilitate single sign-on between the ImpaCT and ahCT Worker Portal applications, an application dashboard – called My Homepage – will be used to facilitate login, authentication, and authorization to the applications.

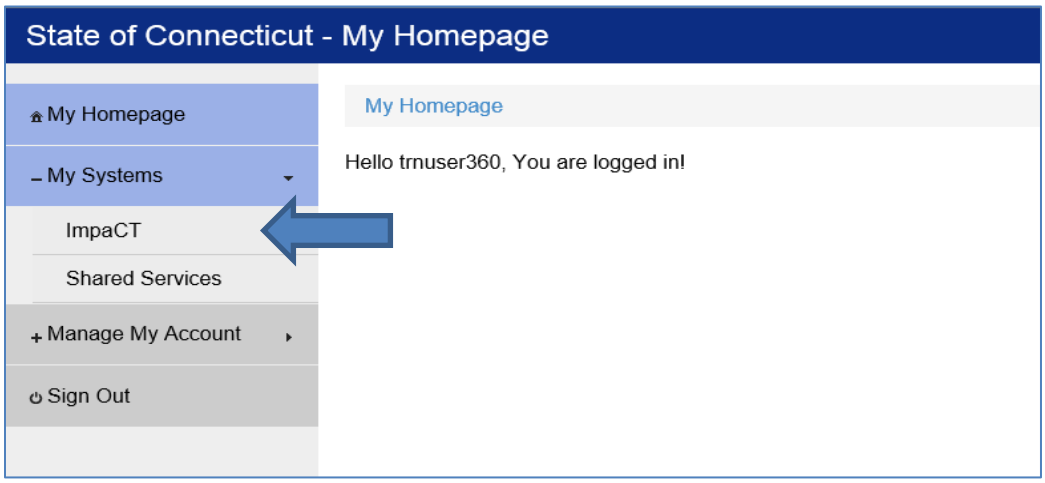
An authorized user can log in to My Homepage via the login page. The My Homepage login page will prompt the worker for their Username and Password. Upon clicking the Sign In button, the worker will be taken to My Homepage.

After 3 unsuccessful login attempts the user will be locked out for 15 minutes. USG can help to reset a forgotten password but have no control over the 15 minute lockout period.

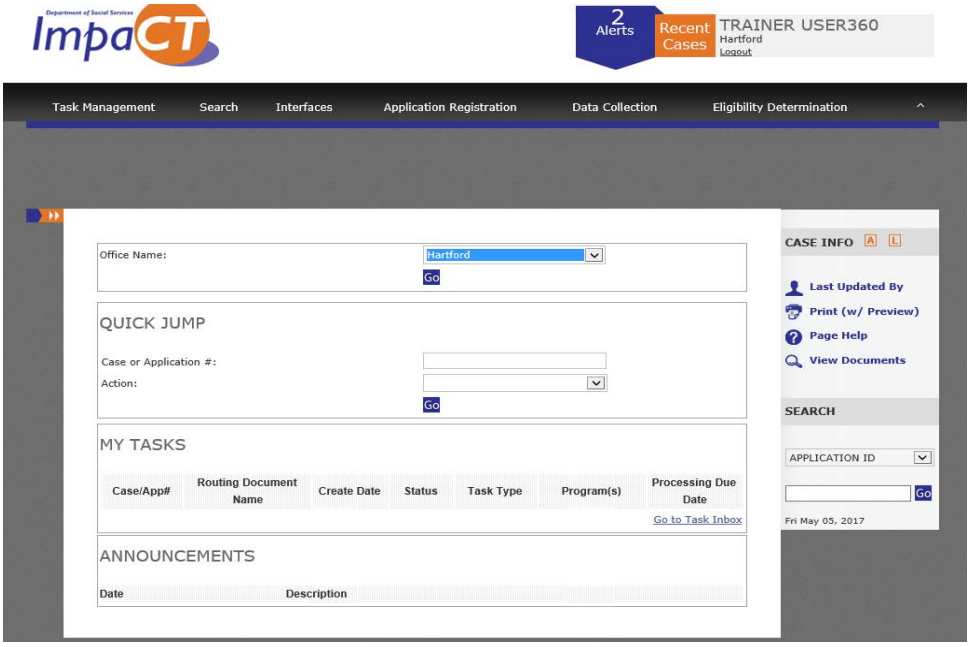


My Homepage
Upon successful login, on the left side of the screen, My Homepage will allow authorized workers to access their applications (My Systems) based on their group membership in SIM/SAM (ImpaCT, ahCT Worker Portal, BIP, etc.), change their SIM/SAM password (Manage My Account) and/or Sign Out of the application.

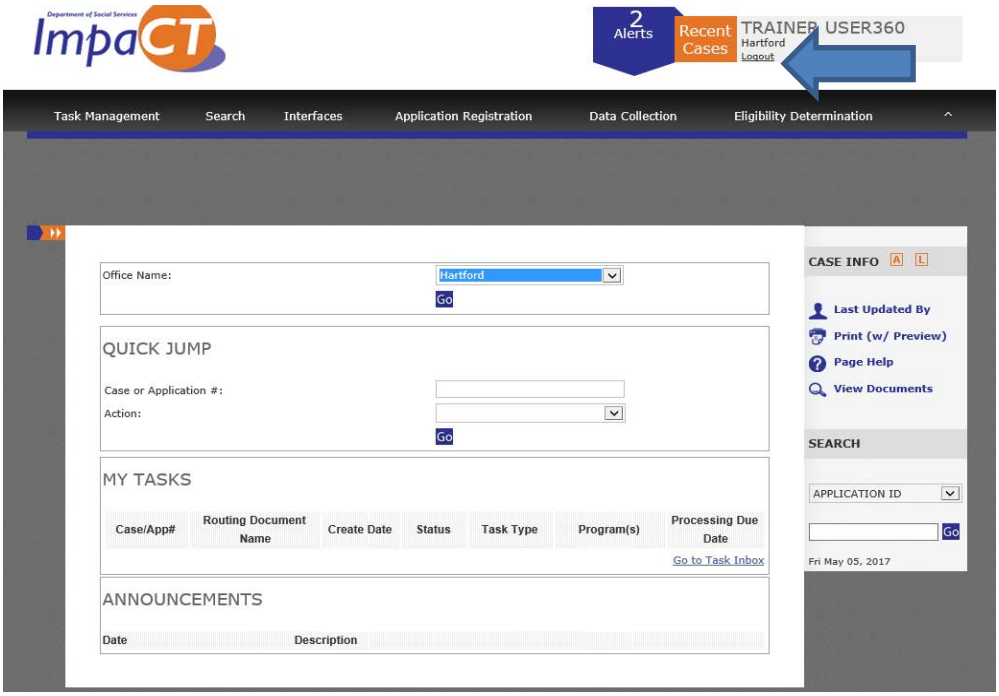
My Homepage will launch applications, such as ImpaCT and ahCT, in new windows. This way, My Homepage will always be open to allow the worker to launch another application if needed.



Logging into ImpaCT
In the Left Navigation, click ImpaCT.
Upon logging in, the ImpaCT Homepage displays. The Homepage allows workers to navigate to relevant modules in ImpaCT. The Homepage also contains the Dashboard. There are three sections on the Worker Dashboard: Quick Jump, My Tasks, and Announcements. If you see the ImpaCT Homepage, congratulations! You have successfully logged in to ImpaCT!



Logging out of ImpaCT
Click the Logout hyperlink in the ImpaCT Banner.



The ImpaCT Banner displays at the top of all pages in ImpaCT. It contains the ImpaCT Logo, the Alert Window, the Recent Case Window, and your basic worker information.

ImpaCT Logo

The ImpaCT Logo will return the worker to the homepage and refreshes, or updates, the data that consistently comes into ImpaCT.

Alert Window

The Alert Window is the blue button that displays on the upper right-hand side of the pages. Clicking the Alert Window displays the alerts that are assigned to you.

Recent Case Window

The Recent Case Window is the orange rectangle that displays on the upper right-hand side of the pages to the right of the Alerts Window. Clicking the Recent Case Window displays the last ten recent cases viewed or acted upon by the logged in worker.

Basic Worker Information

The Basic Worker Information portion of the banner is the gray box, which displays a worker's name and the worker's office. A Logout hyperlink is at the bottom of the box, which allows the worker to end the current ImpaCT session.

Top Navigation

Directly below the Banner is a navigation bar. This is called Top Navigation. Top Navigation is fixed in its position throughout ImpaCT. It can be found directly under the Banner on every page.
This feature provides navigation to the business functions or pages that are available to you in ImpaCT. Remember, your security profile dictates which pages you can access. ImpaCT is a module-based navigation system. The Top Navigation provides the starting point for moving through modules. For example, all pages relevant to Application Registration will be available in the Application Registration module. This navigation is designed for both experienced and inexperienced workers, providing quick and easy access to any functionality within ImpaCT.

The Dashboard was developed to give workers a single place to view important tasks, system and policy alerts, and to provide quick access in to ImpaCT. There are two dashboards developed in ImpaCT: Worker and Supervisor. This information below will focus on the Worker Dashboard.
There are four sections on the Worker Dashboard: Office Name, Quick Jump, My Tasks, and Announcements.

Office Name

Office Name displays the office your profile is currently assigned to

Quick Jump

Quick Jump provides workers with a method of initiating certain select tasks

My Tasks

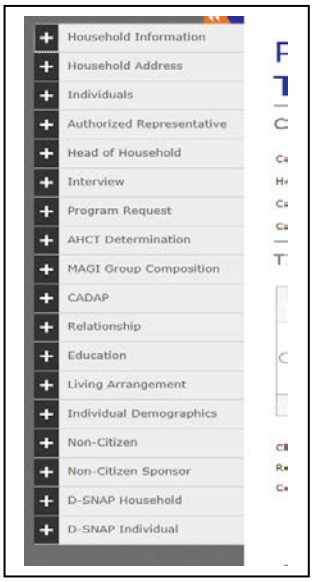
My Tasks displays the tasks currently assigned to you. Based on your configuration, you will be assigned tasks you can work on with the highest priority in the New or Returned to Work Pool status.

Announcements

Announcements display communications that are important for workers to review. These announcements are listed by Date, with the oldest date displaying first on the list. These announcements may involve current ImpaCT issues or updates.

ImpaCT menus provide quick navigation, access to interfaces and basic case information

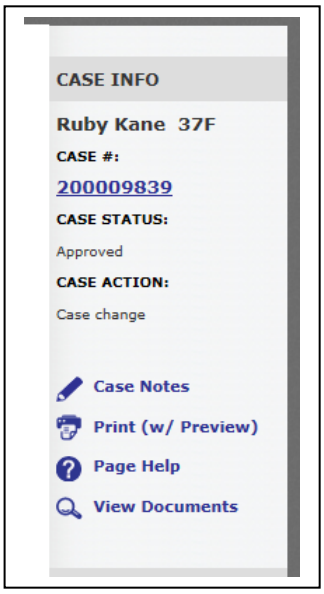
Left Navigation



Left Navigation in ImpaCT allows workers to navigate to pages in ImpaCT. This navigation displays the pages that can be accessed based on the logged-in worker's security profile.

Left Navigation loads in a collapsed mode with the first page of the Logical Unit of Work (LUW) and does not change in size throughout the session. The Expand/Collapse icon on the Left Navigation expands or collapses the navigation. Specific pages can be accessed within a Driver Flow through the use of the Left Navigation.
When a LUW is completed, a white check-mark displays below the Expand/Collapse icon for the completed module. A module is considered completed when all required information has been entered and saved.

Right Menu



The Right Menu provides a quick summary of important case information. The following information can be found in the Right Menu:

Head of Household Information – This displays the full name of the Head of Household on a case as well as the age and gender of the individual. If the Head of Household, or anyone in their household, has an accommodation, an A icon will display to the right of this information. If the Head of Household, or anyone in their household has a primary language that is not English, an L icon will display to the right of this information; if both are applicable to the case both A and L will display. When clicked, the icons launch the Accommodation/Interpreters Log, pre-filled with the Head of Household's record information

Case Number – The unique number assigned by ImpaCT for an individual's case
Case Status – The current status of a case
Case Action – The action a worker is taking on a case
Case Notes – When clicked, the Case Notes page displays. This icon only displays when a worker is in a case

Last Updated By – When clicked, a pop-up window detailing the last worker or automatic process that updated the case. On pages where history is enabled, a worker can select this button after navigating to a historical record to see who has updated that historical record

Print (w/Preview) – When clicked, this icon displays standard print preview functionality for the page. This will create a printer-friendly page for the worker to print

Page Help – When clicked, the page help for the current page displays.

View Documents – When clicked, the Electronic Case File pop-up displays document information in a table, featuring the Document Title, Received Date, and Status. Documents shown will only be for individuals that are in the household of that particular case. Workers can find documents for individuals outside the household by navigating to the Document Search page. In order to communicate this functionality effectively to the worker, the following note will display in red at the bottom of the popup: “Note: The documents shown reflect documents for all ‘In Household’ individuals within the case”

Interface Icons – This section displays icons for each interface applicable for a particular page. For pages that have both a request and view interface icon present, the request icon shall always display first (i.e. to the left of the view icon). When clicked, the appropriate interface will be called and executed. Review the Interfaces lesson for additional information

Search Bar – The Search Bar enables workers to search using different search criteria

The footer is part of all the pages in ImpaCT (with the exception of pop-up pages), and is intended to help view or navigate to specific information quickly and easily.

Here are the links that display:

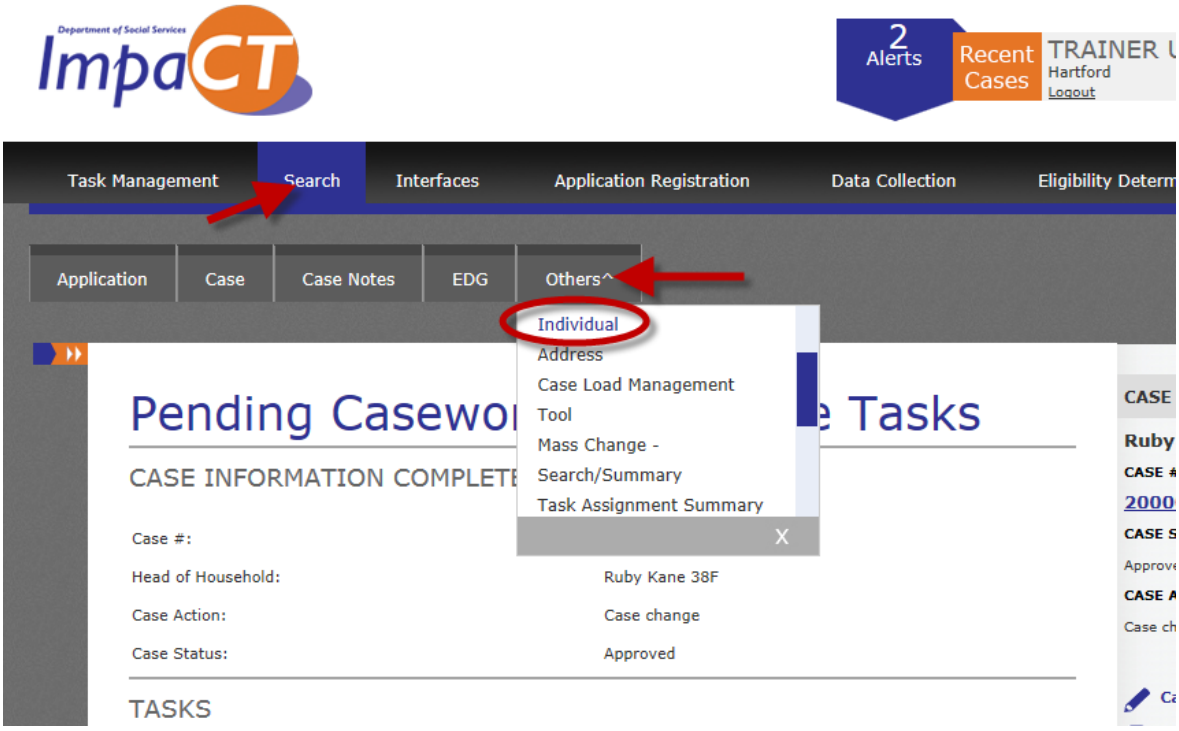
Home	Returns workers to the ImpaCT Homepage
DocuShare	Takes workers to DocuShare; it opens in a new window to avoid interrupting ImpaCT
UPM	Takes workers to the existing UPM, available on the DSS Website. This opens in a new window to avoid interrupting ImpaCT
eRegulation	Takes workers to the eRegulation Portal. This opens in a new window to avoid interrupting ImpaCT
How To	Takes workers to process-level Online Help
Logout	Logs the worker out of ImpaCT, ending the session

How to Find a Client or a Case

Most External Partners only update one specific area of ImpaCT, or are Read Only users. For these purposes you will begin your work by searching for a client or case.

Searching for an Individual

Select the Search module, then from the Others caret in the submenu, select Individual.



Enter the individuals information and click Search

Your results will be returned in a table showing the client's

- Name
- CLID
- ahCT ID
- Case or App ID #
- Assigned Worker
- SSN
- DOB
- Conversion Status
- Case Status

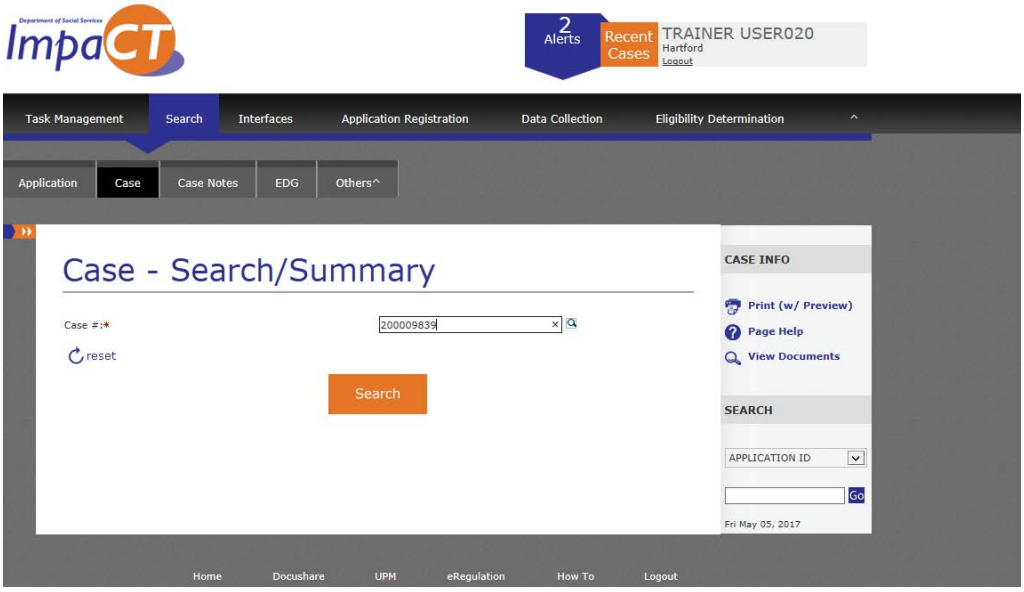
INDIVIDUAL SEARCH RESULTS

Name	Client ID	AHCT ID	SSN	Date Of Birth	Conversion Status	Case / Application #	Case Status	Worker	
Ruby Kane 38F	100040863		140-11-1120	02/01/1979	Non-EMS Client	200009839	Approved		
Ruby Kane 38F	100040863		140-11-1120	02/01/1979	Non-EMS Client	T00460903	Approved		

Page 1 of 1 10 View 1 - 2 of 2

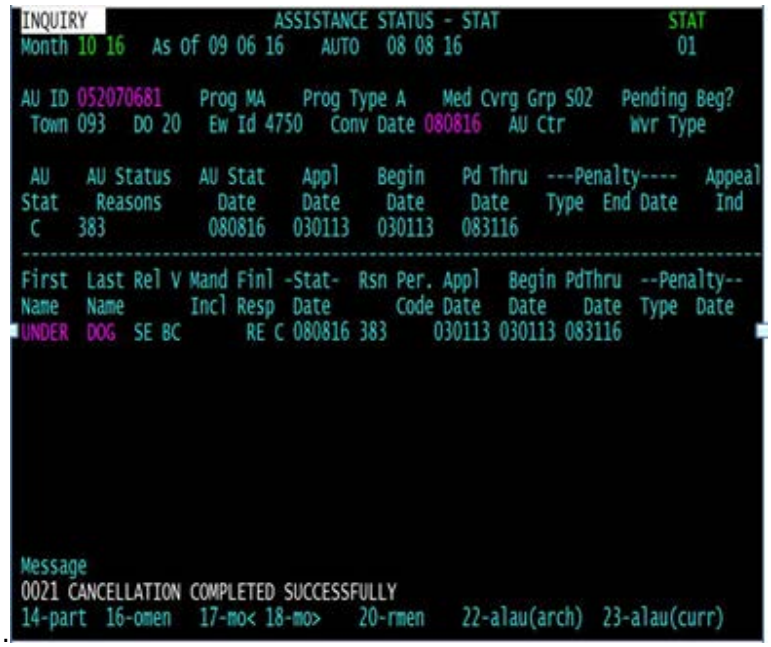
Searching for a Case

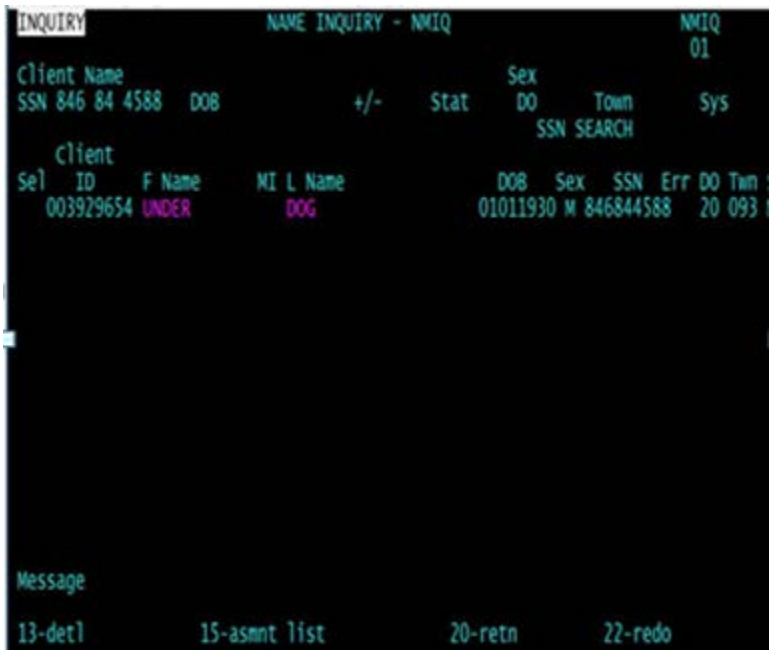
Select the Search Module and then Case in the submenu. Enter the Case ID number or select the Magnifying Glass to have other demographic fields to search by.

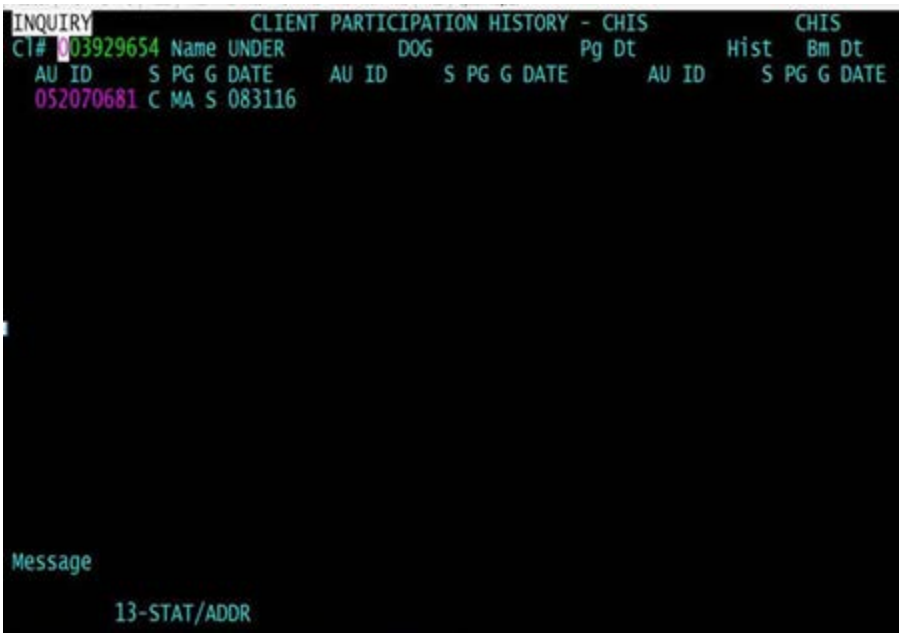


Identifying an EMS record of a converted client

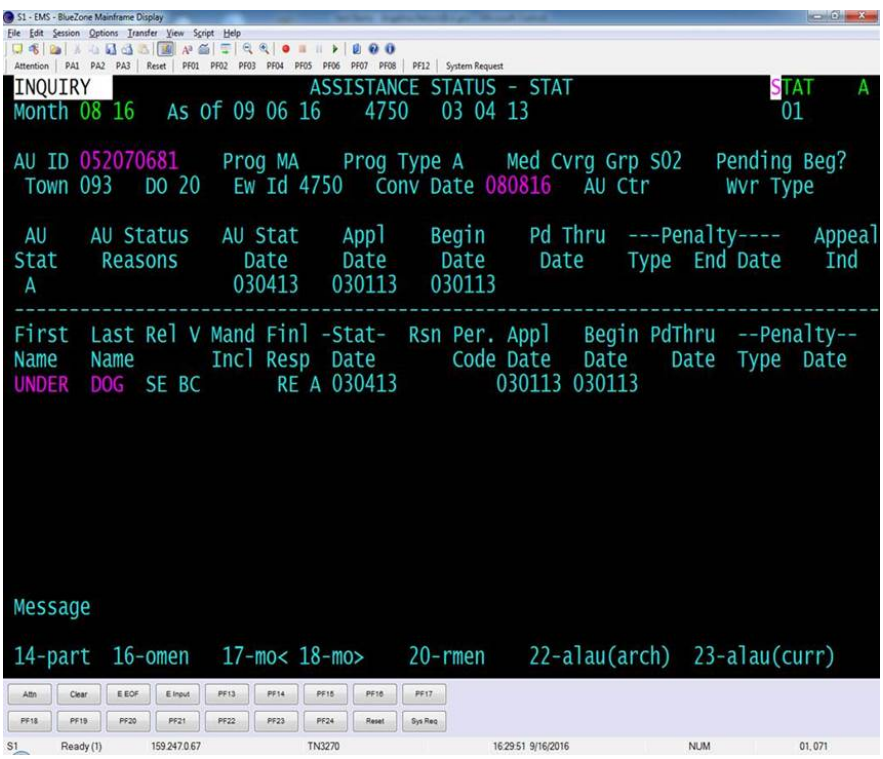
When searching in EMS you will be able to identify a client who has been converted to ImpaCT. Certain fields will be PINK and indicate that the client has been converted. Client Name, AU Number, and a date of conversion will all be highlighted PINK. You will be able to see this on multiple screens when viewing a client in EMS such as the Client Participation screen, the Program Stat screens, and Name Inquiry. You will also see an AU STAT closure code of 383 for converted cases





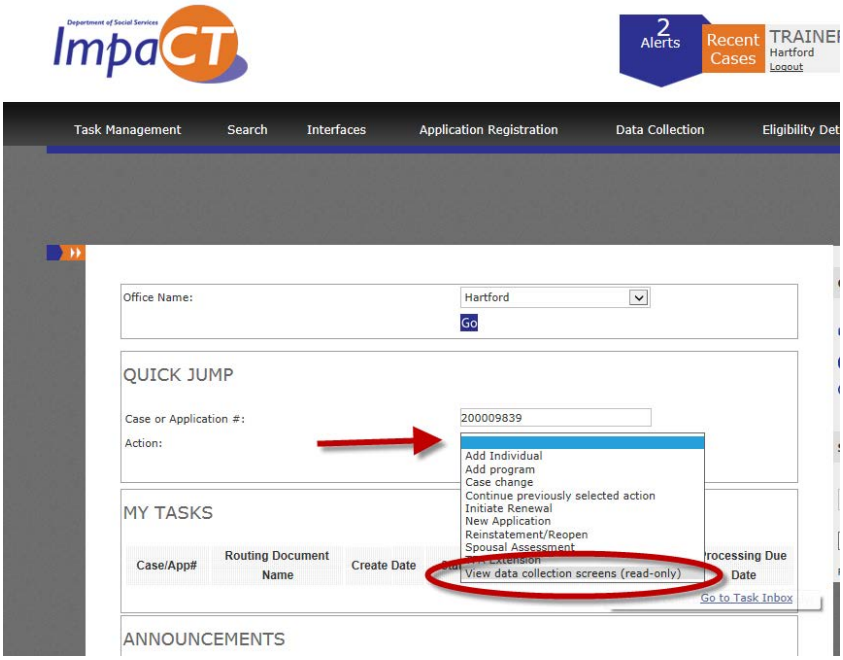


When viewing historical months in EMS you will see the program as active, but the same information will be highlighted in PINK to exhibit the conversion to ImpaCT.

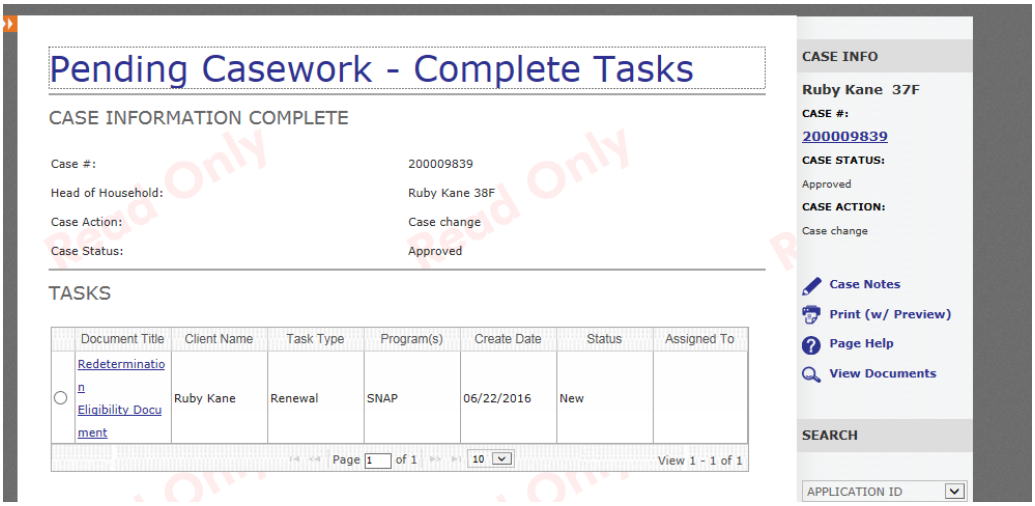


How to read case notes for clients

To read or create case notes you need to be in Data Collection. If you are not trying to make any other changes to the case then you will enter through View “Data Collection Screens Only”



Once in “View Data Collection Screens Only” the right menu will display the case notes link



Getting Work

A few External Partners will actually pull their work from a queue. In these cases the staff will be utilizing Task Inboxes to receive their work

Task Inbox

Tasks are the same thing as work items in ConneCT. Tasks will be used by staff in the Processing Center to start work on a case, by Benefits Centers agents to conduct a SNAP phone interview, or Service Center workers when an in-person client has already sent in a document. Processing Tasks are created in ImpaCT by documents scanned at the DSS Scan Center or through an online submission. When documents are scanned by the DSS Scan Center, tasks are created and assigned Task Types and Programs. These tasks are then sent to the Work Pool. Tasks are always sent to the Work Pool unless the associated case is owned by a worker or unit.

To retrieve tasks from the Work Pool, workers will click on the Get Next Task button. The tasks that are retrieved are based on your Unit and Employee Task Configurations.

Task Statuses

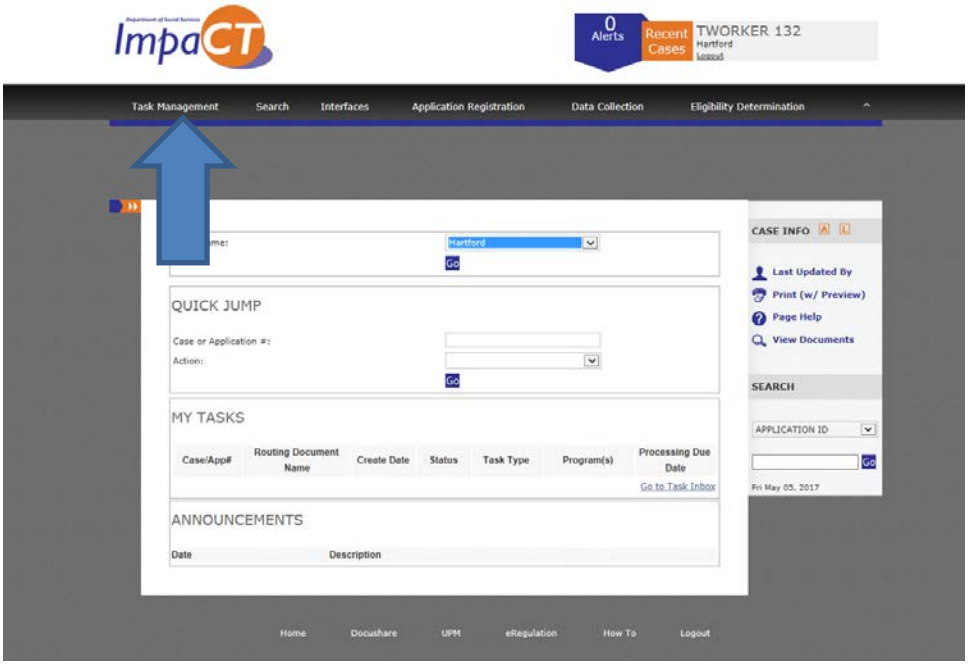
Task workflow consists of the following statuses: New, Assigned, Returned to Work Pool, In Progress, and Complete

Status	Definition
New	The task has never been assigned to a worker and can be acted on by any worker with the appropriate task configurations.
Returned to Work Pool	The task was returned to the Work Pool by a worker. The task can be acted on by any worker with the appropriate task configurations.
Status	**Definition**
Assigned	A worker has been assigned the task and it is in the worker's Inbox, but the worker has not started the task (i.e. has not updated the status to **In Progress**).
In Progress	A worker has selected to work on the task and it is in the worker's Inbox. **In Progress** tasks are assigned to a worker, but another worker can take that assignment away as long as that initial worker is not actively working on the case at the moment.
Complete	The task has been completed by a worker. Completed tasks cannot be re-opened.

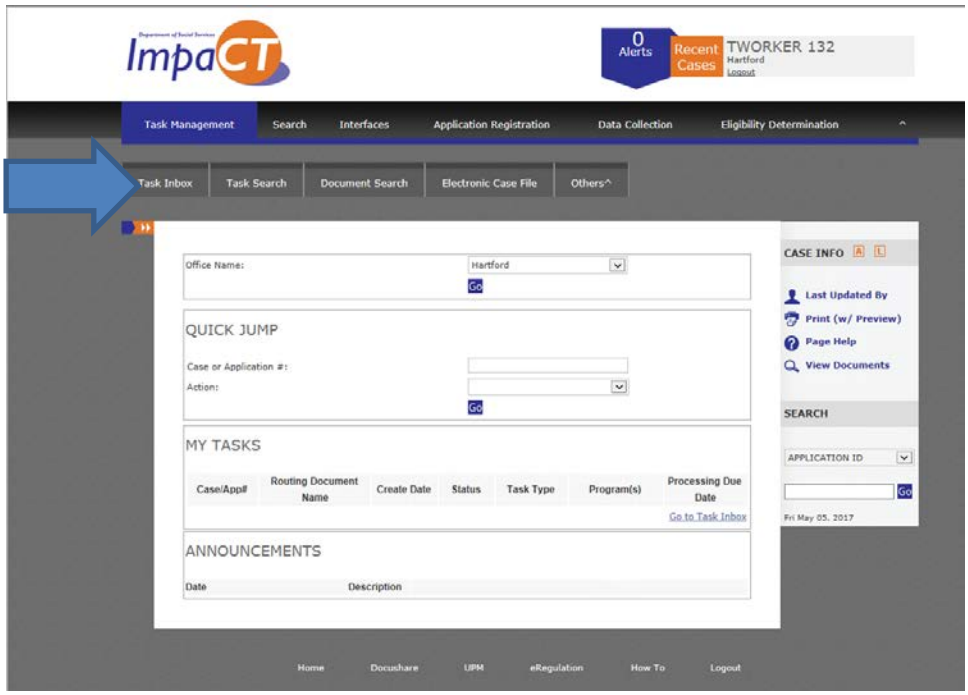
Finding & Starting a Task

There are two ways to start a Task in ImpaCT. The first is from the Task Inbox, and the second is from the Task Search page. From the Task Inbox when clicking Get Next Task, ImpaCT assigns the next New or Returned to Work Pool task available to work on based on a worker's configuration. The task will display in the My Tasks section on your ImpaCT Dashboard.

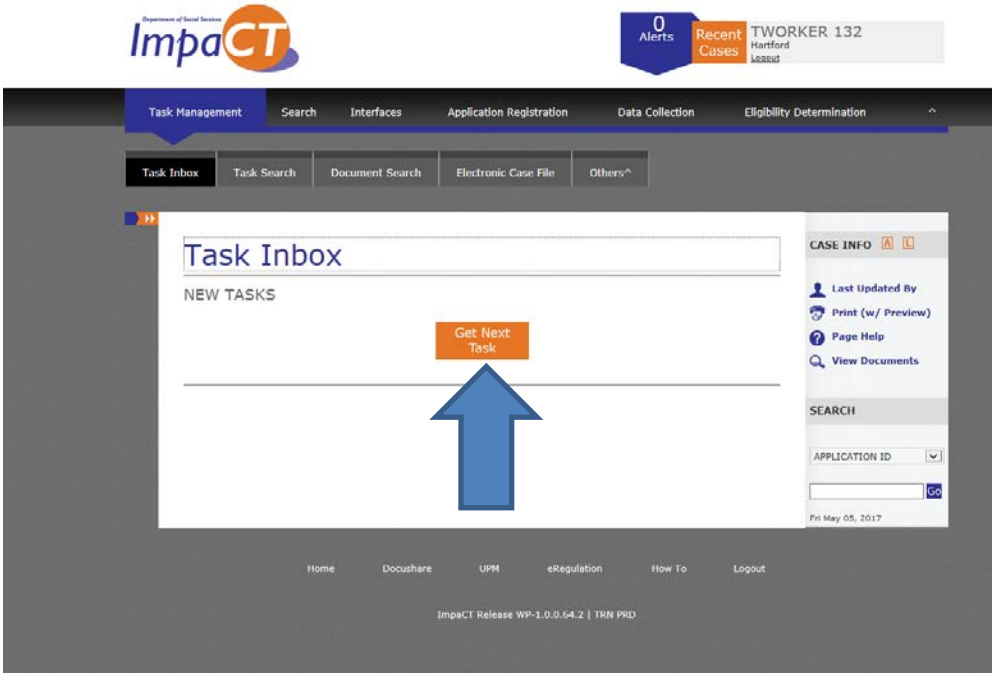
In Top Navigation, click on **Task Management**.



Click on the **Task Inbox.**



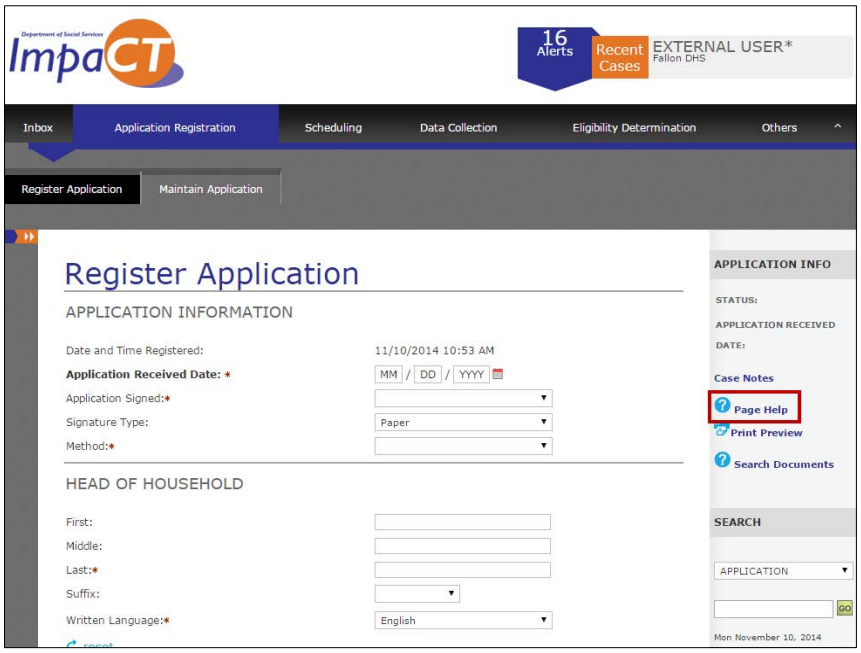
Click on **Get Next Task**.



Resources

Page Help

Page Help describes the content of a specific page, including the description of the page, and definitions of the sections and fields. Page Help lists and defines all fields on the page in the order they appear on the page for ease of searching.



How To Help

How To Help contains guidance on completing pages, processing tasks, and other crucial processes, providing step-by-step instructions for key functionality and procedures within ImpaCT. This form of help is accessible via a hyperlink in the footer at the bottom of the page.

An **Additional Guidance** section at the bottom of each How To Help window contains links to policy information, business processes, and/or information about the use of a specific page or a field on that page.

Job aids developed for ImpaCT are loaded into the directory in How To Help under the topic of **Job Aids**.

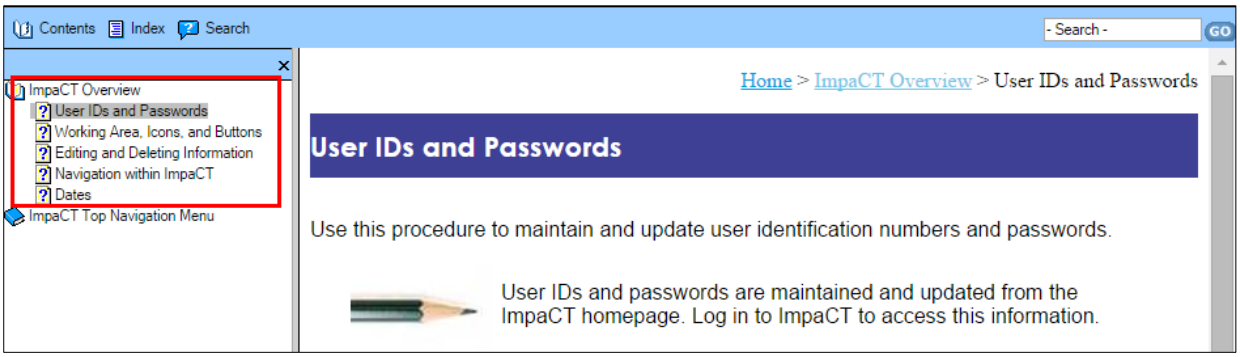
Using How To Help

The organization of How To Help is by topic. Access each topic by clicking on a topic book, or by searching for the topic. Specific process help is available within each topic.

To find How To Help by searching for a specific topic:

Step 1 - Access How To Help by clicking the corresponding hyperlink in the footer.

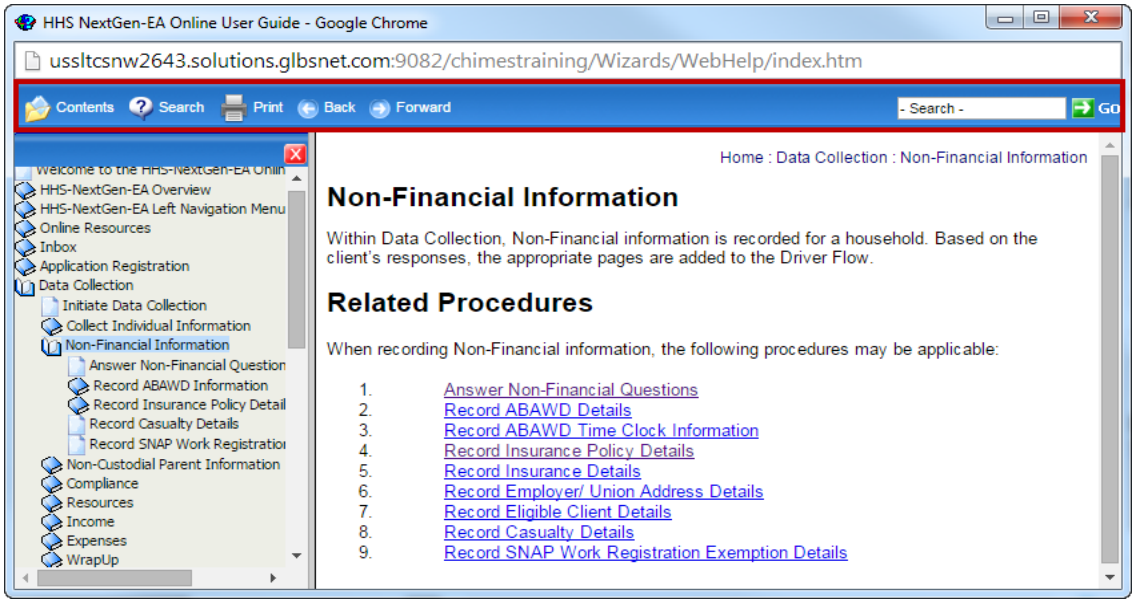
Make sure the **Left Navigation Menu** displays in **Contents View**. In **Left Navigation Menu**, click the topic book that corresponds to the topic of process help needed.



Step 2 - Continue navigating through topics and subtopics until the topic of process help needed is located.

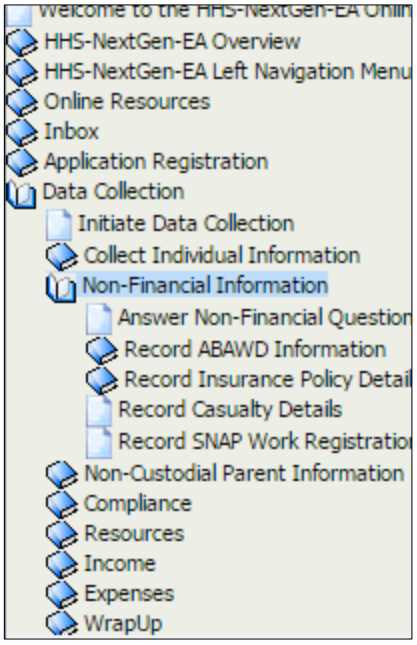
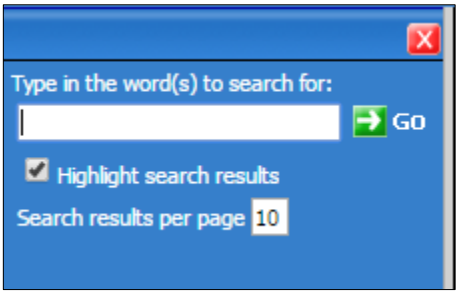
Elements of the How To Help Window

The How To Help window contains multiple ways to locate information. The elements that make up the How To Help Window are: Icon & Search Bar, Left Navigation Menu, and Help Pane.



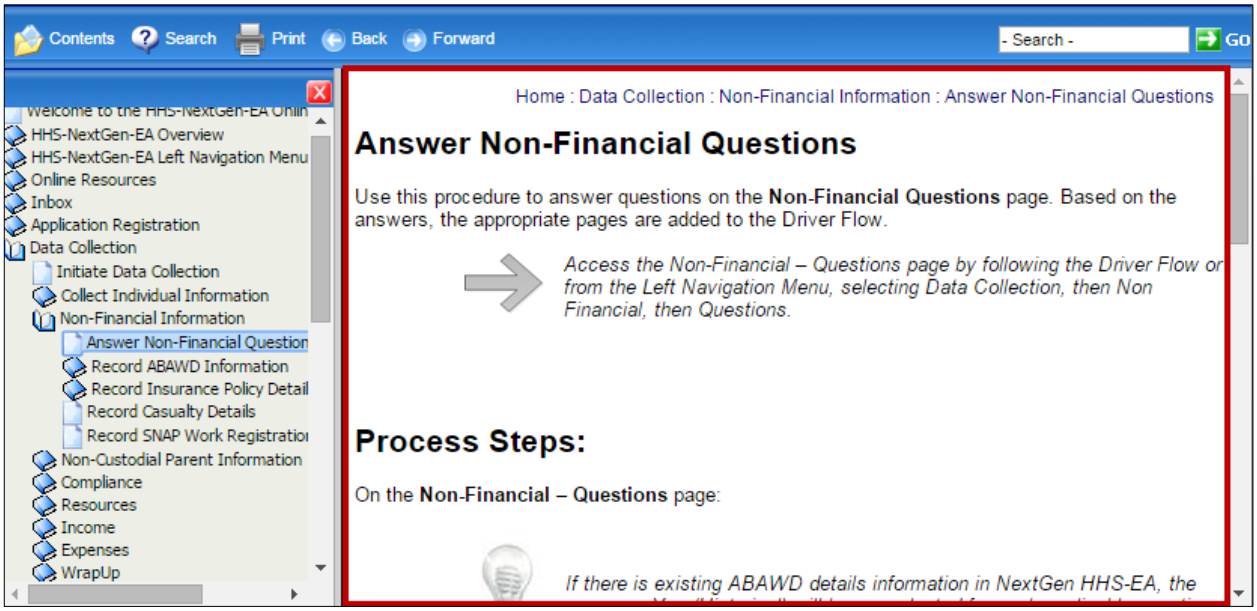
Icon & Search Bar		
Element	**Description**	**Example**
Contents	Displays information available in How To Help by topic in the left-hand portion of the pop-up	
Search Icon	Displays a search field and other search elements to locate a specific piece of help	
Print	Click the icon to display information in a print preview. This also allows for the information in the pop-up window to print	
Back	Returns to the previous page accessed during a single browsing session; this operates like a previous button in a web browser	
Forward	Advances to the next page in the series; this operates like a next button in a web browser	
Search Field	A field in which staff enter the subject for which they need process help	
Go	Initiates a search on the subject entered into the **Search** field	

The table below explains what displays upon specific icon selections.

Left Navigation Menu			
Element	**Description**	**How to Access**	**Example**
Contents View	A list of How To Help topics displays in alphabetical order. The Contents View displays a list of several books. This outlines the subject matter available in How To Help. When you click on a closed book, the book icon "opens" and the next level of the How To Help outline displays. Click the same topic to close a book. A page icon indicates that you cannot drill down further into the subject.	This is the default view upon opening How To Help. Click the **Contents** icon to return to this view, if needed 	
Search View	A search field and other search elements display for the purposes of locating a specific piece of help	Click the **Search** icon 	

Help Pane

The help pane is the portion of the pop-up that displays the process help. It is located on the right-hand side of the pop-up.

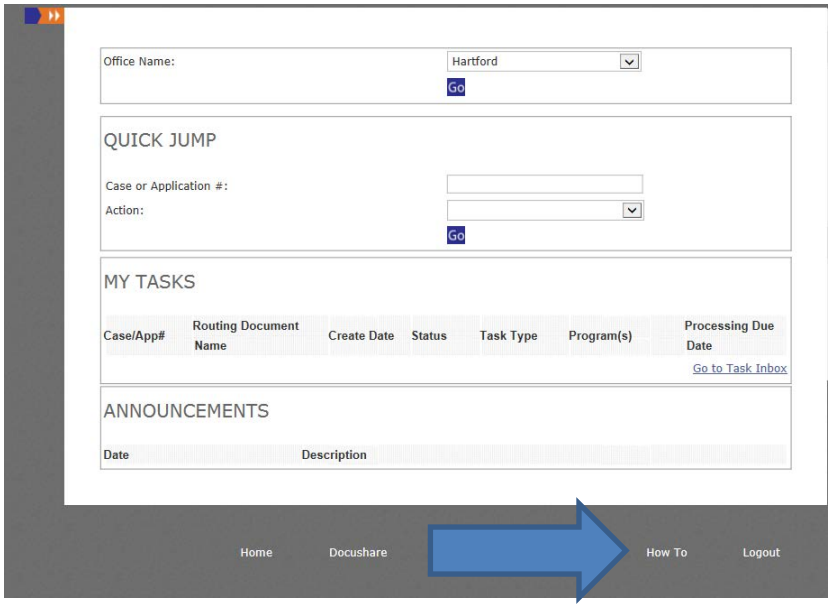


All screenshots will be updated once ImpaCT files are loaded into RoboHelp.

Accessing Job Aids

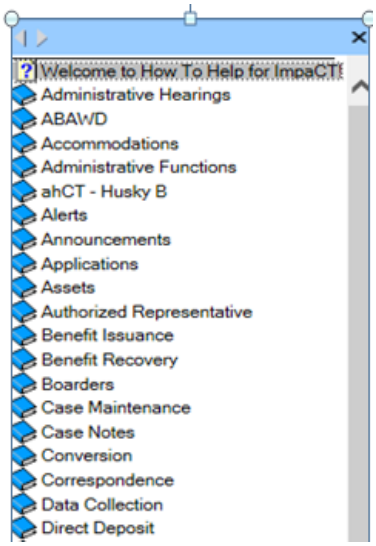
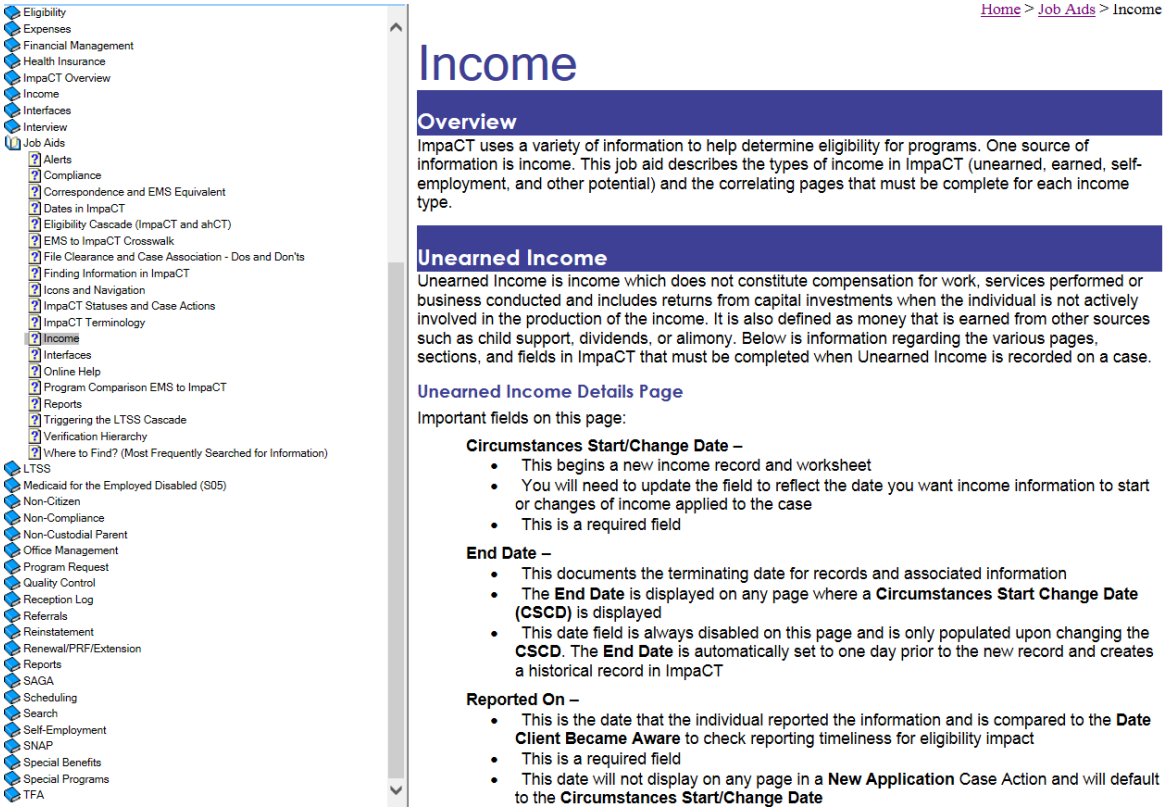
Job aids developed for ImpaCT are loaded into the directory in How To Help under the topic of **Job Aids**.

Step 1 - Access How To Help by clicking the corresponding hyperlink in the footer.



Step 2 - Access the Job Aids by clicking the corresponding hyperlink in the Left Navigation

Step 3 - Access the Job Aids by clicking the corresponding hyperlink



Step 1 -- Access the particular Job Aids by clicking the corresponding hyperlink