

EDUCATION NATIONAL WORKLOAD MANAGEMENT PLAN EFFECTIVE MAY 1, 2019

This national workload management plan was developed to ensure all Regional Processing Offices (RPOs) consistently work towards the national timeliness and performance measures. RPOs should follow this plan for all original and supplemental processing. Any special mission teams (i.e. COWC, Work Study, VET TEC, STEM, etc.) must prepare their own annual workload plans and submit them to the Workload Management Team no later than August 15th each year.

TIMS WORKLOAD DISTRIBUTION AND MANAGEMENT

Work for all benefits is always performed on a First In-First Out (FIFO) basis within its own chapter and type of work (original vs. supplemental). This means oldest claims are priority and must be worked first. The only exception to this process is working claims placed in the "Hardship" queue in TIMS. Any other exceptions to this process will be through prior approval through the Deputy Director of Operations or his/her delegate.

Each day, the Assistant Education Officer (AEO) or his/her delegate will define the work priority for the day and determine which work should be moved to the appropriate TIMS work queues for processing. Work will be assigned based on age and percentage break from the RPO's workload management report unless otherwise determined by Education Service. The number of cases assigned in each team's "Work" queue will be sufficient enough to allow the Veterans Claims Examiners (VCEs) to work, striving to take appropriate action on all assigned claims by the end of the day.

Once the AEO or his/her delegate has determined the work for the day, the Supervisor or their delegate will move the work to appropriate queues. Work assigned to individual queues should be monitored to ensure timely completion.

Unless otherwise directed, VCEs will first review all work pending in their individual work queues, concentrating on the claims which have been placed there for development, resolution, correction, etc. Once the VCE has completed all actions in their queues, they will work from the TIMS "Work" queue, processing claims in date order by pulling next in group queue. It is recommended VCEs regularly review their individual queues throughout the day for returned cases, as well as those for which development action has been initiated and either the suspense date has arrived, or additional information has been received.

WORKLOAD MANAGEMENT REPORTS

Education Workload Management Reports are run using Oracle Business Intelligence Enterprise Edition (OBIEE). These reports provide detailed information on pending and completed claims throughout the RPOs. The reports are exported to Excel to produce a list of claims to be reviewed and/or distributed. The Workload Management Team is responsible to periodically ensure the RPOs are reviewing all reports as indicated below. If a discrepancy is discovered, the Education Officer will be contacted to review any outlying work. If the RPO needs additional training to run OBIEE appropriately, please contact the Workload Management Team directly for assistance.

1) **All Systems Pending Detail Report (by RPO)**

This report has the ability to provide many different filtered lists. The **required** filtered reports are discussed below. The report is a compilation of tokens pending in TIMS, end product codes (EPs) in BDN, and open work products in the Long Term System (LTS).

- a. **EP Days Past Due Filter** is indicated by the suspense date field in BDN. The suspense date and reasons are necessary for reporting purposes to determine if the case needs to be worked. This report shows any cases with an EP past due of one day or more. These cases should be reviewed for completion or the user should update the BDN suspense reason and date. Supervisors or their delegates are responsible for a **daily** review of EP Days Past Due
- b. **EP/ No TIMS Filter** is a report which provide a list of the claims that have an EP pending in BDN, but no open claims token in TIMS. This report should be reviewed **daily** by a Supervisor or his/her delegate.
- c. **TIMS Without EP Filter** creates a report which lists those claims that have an open claim token in TIMS but no EP pending in BDN. This report should be reviewed **daily** by a Supervisor or his/her delegate on those claim tokens pending more than 30 days.
- d. **Work Product Only Filter** creates a list of all claims with an open Work Product (WP) in LTS, but without an active claim token in TIMS or EP in BDN. Supervisors or his/her delegate are responsible for review and action on all open WPs to either complete the WP or delete the WP. This report should be sent out **weekly** by the AEO or delegate and a response from the appropriate Supervisor will be due on a date determined by the AEO.
- e. **OLD in Queue Review Filter (Work in Progress)** creates a filtered list of stagnant assigned cases by using the Token Status filter. This report lists all open claim tokens in TIMS that have been in an individual queue regardless of whether there is an associated EP. Supervisors or their delegates are responsible for **weekly** basis

of reviewing any cases pending in one of the individual's queues more than 7 days (Token Days PNDG).

- f. **Development/DOD Development Filter** creates a filtered list of the EPs with a disposition of O-DEV or O-DOD. All Supervisors or their delegates will be responsible on a **weekly** basis for review of both reports that are past the suspense date. (This will be revised when EDMS is fully implemented)
- g. **Pending Diary Filter** is a filtered list for all pending diaries. These pending diaries are based on BDN EPs. Supervisors or their delegates are responsible for the **weekly** generation of this list of all pending diaries within the next 7 calendar days. These claims should be assigned as appropriate to be completed during the next week.

2) W40 Report (BDN)

The preferred reports are generated through OBIEE. However, BDN still creates some useful reports RPOs must use. The BDN W40 Report shows rejected transactions over 10 days and claims which are pending authorization over 5 days. Until there is an approved OBIEE national report, RPOs must run this **daily** by the Supervisor or their delegate for Non-Chapter 33 benefits.

3) VACOLS Reports. The Supervisor or their delegate over the Appeals area is responsible for a **weekly** review of the following legacy cases identified on the VACOLS report:

Report	Date Range	Action
NOD Status	All cases over 120 days	Process SOC if in order
Diary Past Due	All	Take Appropriate Action
Remands by RO	All	Have All Actions Completed
SSOC Status	All cases over 60 days	Take Appropriate Action
Form 9 Status	All cases over 60 days	Prepare Case for BVA Transfer

4) Additional Reports and Reviews

All Supervisors will be responsible for the following:

- a. Conduct **periodic audits of individual queues** to validate adherence to the office workload management policy by team employees. Reviews will be appropriately annotated and submitted to AEO for concurrence and/or action.
- b. Conduct **weekly** review of team aggregate queues and miscellaneous team queues for misrouted claim tokens. Reviews will be appropriately annotated and submitted to AEO for concurrence and/or action.

c. **Daily** review and assignment of cases from Correction, Return (RPO), Hardship, Hardcopy and Sensitive queues.

d. **Upon receipt**, ensure all LTS reports (payment action, payment aging, in progress work products over 60 days, etc.) are reviewed and addressed within 2 business days. The AEO or designee must review all payment action reports and forward the completed report to the Workload Management Team at 222A.VBAVACO@va.gov.

5) Customer Service Coach

a. **Daily** review and assignment of hardship cases in TIMS and Oracle Client Services (Right Now Web)

b. **Daily** Review and refer any Oracle Client Services pending over 10 days for appropriate action.

c. **Weekly** review of individual queues to validate adherence to the office management policy by team employees.

6) Upstream Coach

a. The Upstream coach will alert AEO and secure additional resources if oldest bulk date is more than 5 business days behind current date.

b. Each Friday, the Supervisor will submit a status to AEO of any batches in Index QC or Fix pending over 14 days. The status should include last action taken and the date of the last follow-up.

c. **Weekly** review of individual queues for team members

RPOs are encouraged to develop their own additional reports to enhance the managing of the workload. Quarterly, any new workload plans developed locally should be shared with the Workload Management Team (222A) for consideration of deploying nationally. No alterations to these listed reports are allowed without prior approval from the Assistant Director of Operations or his/her delegate.

BROKERING PROCEDURES

For National timeliness and performance standards to be met, the use of brokering work among the three RPOs may be necessary.

The Chief of Workload Management Team or delegate will monitor each RPO's pending workload and will contact the RPO Director (or his/her delegate) requiring assistance to establish a brokering plan to balance the national workload.

The RPO Director (or his/her delegate) may also reach directly to the Assistant Director of Operations or Chief of Workload Management to begin discussion of a brokering plan.

Brokering will be managed by the Workload Management Team and will not be implemented without concurrence from the Assistant Director of Operations.

During the brokering process, the receiving station prepares the appropriate access requests. It is imperative for the brokering process that users who receive access to another station keep their access current, by logging into BDN monthly. In addition, brokering assistance should not be removed from TIMS until directed by Chief of Workload Management or his/her delegate.

For questions about this workload management plan, please contact the Workload Management Team at 222A.VBAVACO@va.gov.