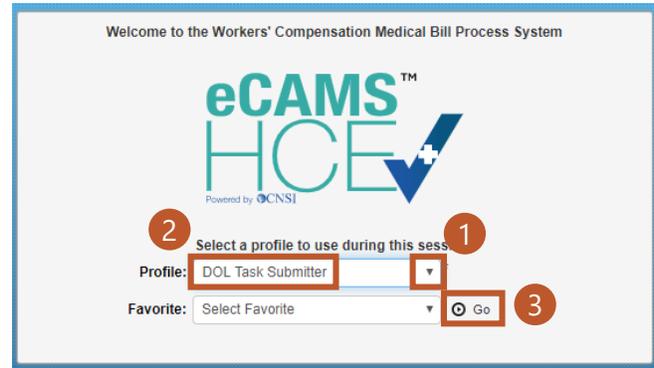




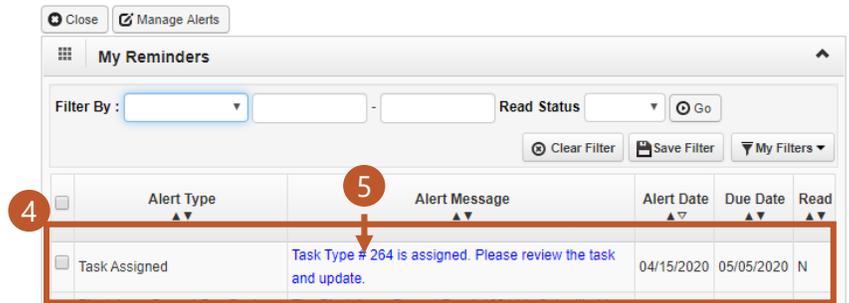
# Task Portal Job Aid

## Navigating to the Task Portal

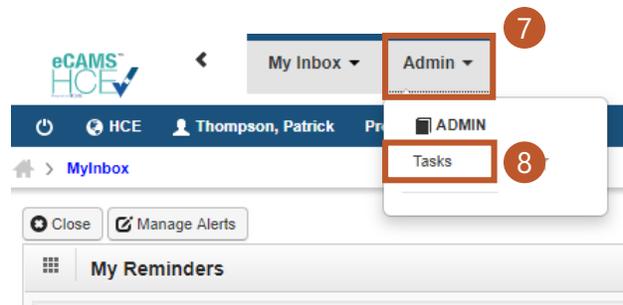
1. First, select the drop down arrow to view additional profiles.
2. Select the **DOL Task Submitter** Profile
3. Select the **Go** button.



4. After logging in, you can see any **Task Alerts** for tasks that have been assigned to you in the My Reminders section of the home page.
5. Select the **Alert Message** hyperlink to view the details of the alert.
6. To navigate to the list of tasks, perform the following steps in the next row. ▼



7. Select the **Admin** Tab.
8. Select the **Tasks** menu item.



9. The WCMBP System displays the **Tasks List** page.
10. On this page you can see the Task ID, Task Type, Program, District Office, Case ID, Task Status, Congressional Inquiry Flag, who created the task, when it was last modified, and who it was assigned to.

Task Id	Task Type	Program	District Office	Case ID	Task Status	Congressional Inquiry Flag	Created By	Modified By	Modified Date	Assigned To
1057	Fee Schedule Update	DCMWC	DCMWC - Charleston		Completed	Y	nanda.pingaria	nanda.pingaria	04/15/2020 15:26:20	sujata.mohanty
1056	Expedite Provider Enrollment	DCMWC	DCMWC - Charleston		Initial Submission	N	nanda.pingaria	nanda.pingaria	04/15/2020 15:05:29	patloorir
1055	Check Trace	DCMWC	DCMWC - Charleston		Initial Submission	N	nanda.pingaria	nanda.pingaria	04/15/2020 14:56:28	patloorir
1054	Claimant Review Flag Indicator Task	DFEC			Completed	N	veeranjanyulu.jagarlamudi	veeranjanyulu.jagarlamudi	04/15/2020 14:37:57	muvvah

**Note:** System displays Task List page with the tasks “Created By” or “Assigned To” you. Also displays all other tasks associated to the user’s Program If user’s access level is “National Office” or “All.” If the user is a District Office user, he/she can only see the tasks that are created/assigned to him/her.



# Task Portal Job Aid

## Using the Task Portal Filters

1. Select a search category from the **Filter By** drop-down.
2. In the adjacent text field, enter a full search term. These are the minimally required fields when performing a search on this page.
3. Select the **Go** button to filter the list of tasks.

► The system permits more than one criterion in your search. The categories in the **Filter By** drop-down are repeated in the two **And** drop-downs to give you up to two additional levels of filter. Like the **Filter By** field, you must enter a search term in the search field adjacent to each **And** field.

The screenshot shows the 'Tasks List' interface. At the top, there are 'Close' and 'Add' buttons. Below them is a 'Filter By' dropdown menu (labeled 1) which is open, showing a list of search criteria including 'Assigned To', 'Case ID', 'Congressional Inquiry Flag', 'Created By', 'District Office', 'Form Name', 'Modified By', 'OWCP Provider ID', 'Program', 'TCN', 'Task Id', 'Task Status', and 'Task Type'. To the right of the dropdown is a text input field (labeled 2) containing a search term. Further right is an 'And' dropdown menu and a 'Go' button (labeled 3). Below the filter section is a table with columns: Task Id, District Office, Case ID, Task Status, Congressional Inquiry Flag, and Created By. The table contains several rows of task data.

## Adding/Creating a Task

1. From the Task List page, click **Add** to create a task.

The screenshot shows the 'Tasks List' interface with the 'Add' button highlighted by a red box and labeled with a '1'. The 'Filter By' dropdown and search field are visible below.

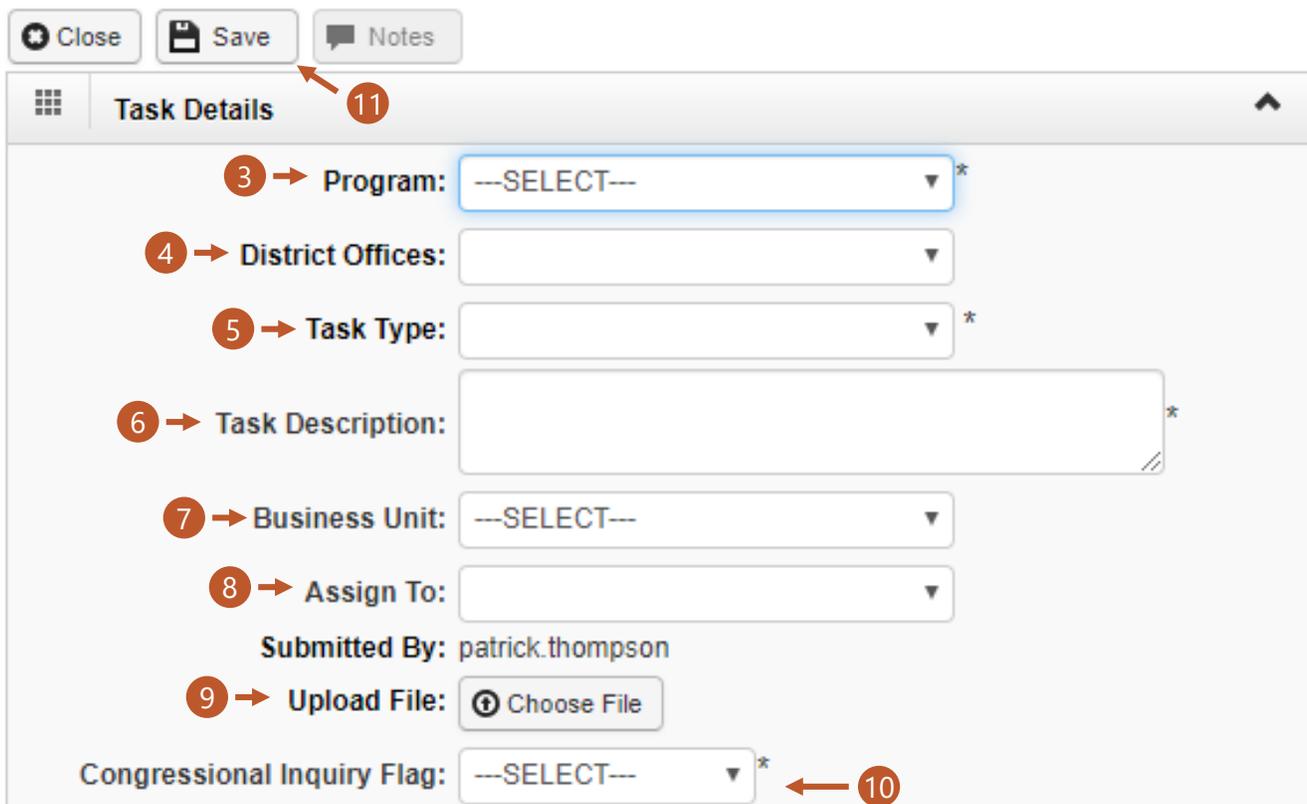
2. The WCMBP System opens the Task Details window. Required fields to complete are denoted by an asterisk (\*).

The screenshot shows the 'Task Details' window. At the top, there are 'Close', 'Save', and 'Notes' buttons. The main area contains several input fields: 'Program' (dropdown, required), 'District Offices' (dropdown), 'Task Type' (dropdown, required), 'Task Description' (text area, required), 'Business Unit' (dropdown), 'Assign To' (dropdown), 'Submitted By' (text, value: patrick.thompson), 'Upload File' (button: Choose File), and 'Congressional Inquiry Flag' (dropdown, required). A '2' is in the top right corner of the window.



## Adding/Creating a Task Cont.

- The first step is to confirm the **Program** for the task.  
**Note:** The program of the Task Submitter should auto-populate by default. If not, select Program from the drop-down list.
- Once the Program field is populated, the **District Offices** will populate and you can select the Task Submitter's District office from the drop-down.
- Select a **Task Type** by clicking on the drop-down arrow. The WCMBP System will populate the Task Type Description, based on the Task Type selected.  
**Note:** Refer to the last page of this document for a list of the available Task Types and Task Type Descriptions.
- In the **Task Description** field, enter task instructions. **Note:** 200 character limit.
- Select the **Business Unit** of the Task Recipient. The options will be CNSI Operations and DOL. This step is not mandatory but helps indicating who should receive the task.
- Based on the Business Unit chosen, the **Assign To** drop down options will populate. Select the staff person that should receive the task.
- Click **Choose File** to open the Task Attachments window to upload a file.  
**Note:** Only .pdf, .tif, .tiff, .xls, and .xlsx file types can be uploaded.
- Select the **Congressional Inquiry Flag** drop-down. You will either select Yes or No.
- Once all required fields are completed, click **Save**.  
**Note:** The WCMBP System will automatically change the task status to "Initial Submission" after saving and it will be added to the Task List. The routing protocols based on task type will automatically send an alert to the system inbox for Task Reviewers responsible for handling the task type. Task Types are also associated with email distribution lists. When a task is created, an email will also be sent to all DOL staff that are a part of the distribution list associated with the Task Type (including the Task Receiver).



The screenshot shows a web form titled "Task Details" with a grid icon on the left and an up arrow on the right. At the top are three buttons: "Close" (with a plus icon), "Save" (with a floppy disk icon), and "Notes" (with a speech bubble icon). The form fields are as follows:

- 3** → **Program:** A dropdown menu with "--SELECT--" and a downward arrow. A red circle with the number 3 and an arrow points to this field.
- 4** → **District Offices:** A dropdown menu with a downward arrow. A red circle with the number 4 and an arrow points to this field.
- 5** → **Task Type:** A dropdown menu with a downward arrow. A red circle with the number 5 and an arrow points to this field.
- 6** → **Task Description:** A large text area with a downward arrow on the right side. A red circle with the number 6 and an arrow points to this field.
- 7** → **Business Unit:** A dropdown menu with "--SELECT--" and a downward arrow. A red circle with the number 7 and an arrow points to this field.
- 8** → **Assign To:** A dropdown menu with a downward arrow. A red circle with the number 8 and an arrow points to this field.
- Submitted By:** The text "patrick.thompson" is displayed below the Assign To field.
- 9** → **Upload File:** A button with a plus icon and the text "Choose File". A red circle with the number 9 and an arrow points to this button.
- 10** → **Congressional Inquiry Flag:** A dropdown menu with "--SELECT--" and a downward arrow. A red circle with the number 10 and an arrow points to this field.
- 11** → A red circle with the number 11 and an arrow points to the "Save" button.



# Task Portal Job Aid

## Viewing Task Details

1. Select the **Task Id hyperlink** to open the Task Details window. The Task Details window contains detailed information about a task including the history and attachment lists of any files attached to the task.

Task Id	Task Type	Program	District Office	Case ID	Task Status	Congressional Inquiry Flag	Created By	Modified By	Modified Date	Assigned To
1057	See Schedule Update	DCMWC	DCMWC - Charleston		Completed	Y	nanda.pingarla	nanda.pingarla	04/15/2020 15:26:20	Sujata.mohanty
1056	Expedite Provider Enrollment	DCMWC	DCMWC - Charleston		Initial Submission	N	nanda.pingarla	nanda.pingarla	04/15/2020 15:05:29	patloorir
1055	Check Trace	DCMWC	DCMWC - Charleston		Initial Submission	N	nanda.pingarla	nanda.pingarla	04/15/2020 14:56:28	patloorir
1054	Claimant Review Lag Indicator Task	DFEC			Completed	N	veeranjanyulu.jagariamudi	veeranjanyulu.jagariamudi	04/15/2020 14:37:57	muvvah

2. Above Task Details header, click the **Update** button to change status of a task.  
**Note:** If a task status is changed to "Complete," then the task is complete and cannot be updated.
3. Click **Notes** button to add remarks/questions to the task details.
4. Click **Upload Attachments** button to add additional documentation (based on task type) to the task details.
5. On the Task Details page, you can **View History** of modifications to the task.
6. Below the View History section is the **Attachment List** section that will show any attachments that have been uploaded to the task.
7. When finished, click **Close** to return to the Tasks List.

Task: 1056 Name: Expedite Provider Enrollment

Buttons: Close, Update, Notes, Upload Attachments, Generate Correspondence, RTP/RTC

**Task Details**

Task Description: testDEFECT 3047  
 Task Type Description: This task is initiated by NO/BMSR to CNSI to create the provider enrollment application in the WCMBP system.

Program: DCMWC  
 District Offices: DCMWC - Charleston

Status: Initial Submission  
 Congressional Inquiry Flag: No

Submitted By: Nanda.Pingarla  
 Submitted On: 2020-04-15 15:05:29.0

Business Unit: CNSI Liaison  
 Assigned To: Rajesh.Patloori

Case ID:   
 Provider ID:   
 DMI Received Date:   
 TCN:   
 Document Form Name:

**View History**

Status	Remarks	Modified By	Modified Date
Initial Submission		nanda.pingarla	04/15/2020 15:05:29

View Page: 1 | Page Count | Viewing Page: 1 | First | Prev | Next | Last

SaveToCSV

**Attachment List**

Add/Edit	File Name	Uploaded By	Uploaded Date
No Records Found !			



# Task Portal Job Aid

## Updating a Task Status

**Note:** If a task has been updated by the Task Receiver and assigned back to you, you will see the Task Alert in the “My Reminders” section on your home page. Follow the steps in the “Navigating to the Task Portal” section to locate the task that needs to be updated and then select the Task ID hyperlink.

1. Select the **Update** button to update the task status.

2. Select the **Business Unit** of the Task Recipient.

3. Based on the Staff Type chosen, the **Assign To** drop down options will populate. Select the staff person that should receive the task.

4. Select the **Congressional Inquiry Flag** drop-down. You will either select Yes or No.

5. Select the **Status** drop-down to change the status of the task. You can change it to “In-Progress,” “Submitted to CNSI,” “Submitted to DOL,” or “Completed.”

6. Enter additional notes regarding the task in the **Remarks** field.

**Note:** 4000 character limit.

7. When finished, click **Save** to return to the Tasks Details page.

8. On the Task Details page, select **Close** to return to the Task List page.

**Note:** Once a task status is changed to Completed, an alert in the “My Reminders” section on the home page will be created for the original submitter, and an email alert will be sent to the distribution list associated with the Task Type.

**Task Details**

Task Description: testDEFECT 3047

Program: DCMWC

Status: Initial Submission

Submitted By: Patrick,Thompson

**Task Details**

Business Unit: CNSI Operations

Assign To: --SELECT--

Congressional Inquiry Flag: No

Status: Initial Submission

Remarks:

**Task Details**

Task ID: 1055

Name: Expedite Provider Enrollment

Task Description: testDEFECT 3047

Task Type Description: This task is initiated by NO/BMSR to CNSI to create the provider enrollment application in the WCMBP system.

Program: DCMWC

District Offices: DCMWC - Charleston

Status: Submitted to CNSI

Congressional Inquiry Flag: Yes

Submitted By: Patrick,Thompson

Submitted On: 2020-04-15 15:05:29.0

Business Unit: CNSI Liaison

Assigned To: patrick.thompson

Case ID:

Provider ID:

DMI Received Date:

TCN:

Document Form Name:

**View History**

Status	Remarks	Modified By	Modified Date
Submitted to CNSI	test	patrick.thompson	04/15/2020 16:13:39
In-Progress	test	nanda.pingarla	04/15/2020 16:11:52
In-Progress	test1	nanda.pingarla	04/15/2020 16:09:51
Initial Submission		nanda.pingarla	04/15/2020 15:05:29

View Page: 1    Go    + Page Count    Viewing Page: 1    << First    < Prev    > Next    >> Last

SaveToCSV

**Attachment List**

Add/Edit	File Name	Uploaded By	Uploaded Date
No Records Found !			



# Task Portal Job Aid

## Adding Notes to a Task

**Note:** Follow the steps in the “Navigating to the Task Portal” section to locate the task that you want to add a note to and then select the Task ID hyperlink.

1. Select the **Notes** button to add additional information regarding the task.

Task ID: 1056

Close Update **Notes** Upload Attachments Generate Corresp

**Task Details**

Task Description: testDEFECT 3047

Program: DCMWC

Status: Submitted to CNSI

Submitted By: Patrick,Thompson

2. The Notes List window will appear. This page will show any notes that have been added to the task.
3. Select the **Notes ID hyperlink** to open the note.
4. Select the **Add Note** button to add a new note.
5. Enter the **Note Description**.  
**Note:** 100 character limit.
6. Enter any additional instructions or comments in the **Remarks** field.  
**Note:** 1000 character limit.
7. Select the **OK** button to add the completed note to the Notes List.

Note ID	User ID	Note Description	Created Date
75000316	patrick.thompson	Test Description	04/16/2020

View Page: 1 Go Page Count SaveToCSV Viewing Page: 1

First Prev Next Last

Add Note Cancel

**Notes Details**

Note Description: \*

Remark:

Ok Cancel

## Adding Attachments to a Task

**Note:** Follow the steps in the “Navigating to the Task Portal” section to locate the task that you want to upload attachments to and then select the Task ID hyperlink.

1. Select the **Upload Attachments** button to add additional documentation (based on task type) to the task details.

Task ID: 1056

Close Update Notes **Upload Attachments** Generate Corresp

**Task Details**

Task Description: testDEFECT 3047

Program: DCMWC

Status: Submitted to CNSI

Submitted By: Patrick,Thompson



## Adding Attachments to a Task Cont.

2. The Task Attachments window will appear.
3. Select the **Choose File** button to browse for the file on your computer.
4. Select the file you will be uploading.
5. Select the **Open** button.
6. You will see the file name of the file appear next to the "Choose File" button.
7. Select the **OK** button to finalize attachment upload.
8. You will be directed back to the Task Details page where you will see all attachments included with the task, including the one you just added, at the bottom of the Task Details page.

The screenshot shows the 'Task Attachments' window. The text reads: 'Please Select the Task Attachment File to be uploaded:'. Below this, there is a text input field labeled 'Task Upload File Name:' with a 'Choose File' button and the text 'No file chosen'. A red box highlights the 'Choose File' button, with a red circle '3' and an arrow pointing to it. A red circle '2' with a downward arrow points to the top of the window. Below the window, a file explorer window is open, showing a folder named 'Attachments' on the Desktop. A file named 'test' is selected, with a red box around it and a red circle '4' and an upward arrow. The 'File name' field at the bottom of the dialog shows 'test', and the 'Open' button is highlighted with a red circle '5' and a rightward arrow.

The screenshot shows the 'Task Attachments' window after a file has been selected. The text reads: 'Please Select the Task Attachment File to be uploaded:'. Below this, the 'Task Upload File Name:' field now shows 'Choose File test.pdf'. A red box highlights 'test.pdf', with a red circle '6' and a leftward arrow pointing to it. A red circle '7' with a rightward arrow points to the 'Ok' button.

The screenshot shows the 'Attachment List' table. The table has columns for 'Add/Edit', 'File Name', 'Uploaded By', and 'Uploaded Date'. A red box highlights the first row, which contains the following data: 'Imaging Index Info', 'test.pdf', 'patrick.thompson', and '04/16/2020 09:12:29'. A red circle '8' with a downward arrow points to the 'File Name' column. Below the table, there are controls for 'View Page: 1', 'Go', 'Page Count', 'Viewing Page: 1', and navigation buttons for 'First', 'Prev', 'Next', and 'Last'. There is also a 'SaveToCSV' button.



### Task Types and Descriptions

Task Type	Task Description	Available To
1099 Adjustment Requests	1099 Adjustment Requests are sent by programs (NO) for manual adjustments to the 1099 resulting from payments and recouplements from outside of the WCMBP system. This request can only be received within the first 10 days of the year for the 1099 of the preceding year.	All Programs
Accomplishment Files	Accomplishment files are sent by programs (NO) with the treasury check numbers for every week's treasury payment files.	All Programs
Authorization Requests	This task is initiated by DO/NO/BMSO to CNSI to create the authorization requests.	All Programs
Bill Creation/Adjustment	<p>This task is initiated by DO/NO/BMSO to CNSI to create the bill or to adjust the bill in the WCMBP system.</p> <p>To perform the task, Ops team needs the following information:            A. Case ID            B. Provider ID            D. Diagnosis Code            F. Line Level information (Service Dates (From and To), Amount, Diagnosis Pointer, Procedure Code, All this information can be submitted in the attachments. Ex: OWCP 1500)</p> <p>To adjust, the following are the necessary information:            G.TCN            Any updates on procedure Code, Diagnosis Code, Adding/deleting anew Line            H. Adjusted amount            I. Program</p>	All Programs
Check Trace	This request is initiated by Program or CNSI. Program to instruct CNSI to trace the treasury payment.	All Programs
Claimant Review Flag Indicator	<p>This task is initiated by NO/BMSO to CNSI to set the claimant review indicator/flag for a specific provider.</p> <p>To perform the task, Ops team needs the following information:            A. Program            B. Case ID/Claimant ID            C. Review Indicator            D. Time Frame (Start Date/End date)</p>	All Programs
EFT Transaction Update/ Notification of Change	<p>"Notification of Change" reports that are received by NO office from treasury office, are attached and submitted.</p> <p>To perform the task, Ops team needs the following information:            A. Program            B. Attachments</p>	All Programs



### Task Types and Descriptions

Task Type	Task Description	Available To
Expedite Provider Enrollment	<p>This task is initiated by NO/BMSO to CNSI to create the provider enrollment application in the WCMBP system.</p> <p>To perform the task, Ops team needs the following information:</p> <p>A. 1168 Form</p>	All Programs
FEE Schedule Appeal	<p>CNSI to raise the task when received any correspondences/appeals regarding the fee schedule appeals.</p> <p>To perform the task, Ops team needs the following information:</p> <ol style="list-style-type: none"><li>1. Need DOL approval for CNSI to adjust the Bill</li><li>2. Need attachments from Provider that have the following information:<ul style="list-style-type: none"><li>A. Provider ID</li><li>B. Case ID</li><li>C. TCN</li><li>D. Attachments/Cover sheet to verify/qualify for Fee Schedule Appeal</li><li>E. "Approved Fee Schedule Amount"</li><li>F. Program</li></ul></li></ol>	All Programs
Fee Schedule Update	<p>This task is initiated by DO/NO/BMSO to CNSI to update the FEE schedule rates.</p>	All Programs
IRS Levies Report	<p>IRS Levy letter sent by DOL/Program to Business Ops using Task Portal. Levy records will be created or updated in the system.</p> <p>To perform the task, Ops team needs the following information:</p> <ol style="list-style-type: none"><li>A. Program</li><li>B. IRS Levies Report Attachments</li></ol>	All Programs
Provider Review Flag Indicator	<p>This task is initiated by NO/BMSO to CNSI to set the provider review indicator/flag for a specific provider.</p> <p>To perform the task, Ops team needs the following information:</p> <ol style="list-style-type: none"><li>A. Program</li><li>B. Provider ID</li><li>C. Review Indicator Type</li><li>D. Time Frame (Start Date/End date)</li></ol>	All Programs
Reissue 1099-MISC Form	<p>This request is initiated by Program or CNSI. Program to instruct CNSI to reissue 1099. CNSI to reissue 1099 based on the program approval.</p>	All Programs
Reissue Payments	<p>This request is initiated by Program or CNSI. Program to instruct CNSI to reissue payments. CNSI to reissue payments based on the program approval.</p>	All Programs



### Task Types and Descriptions

Task Type	Task Description	Available To
FOH Transaction	"FOH Prompt Pay "transactions that are to be stored as history are attached to the task.  To perform the task, Ops team needs the following information:  A. FOH Excel Report	FECA
LockBox Report	Lockbox report sent by programs to CNSI. Once received, the treasury check numbers from the accomplishment file will be applied to the payment records.  To perform the task, Ops team needs the following information: A. LockBox Report Attachments	Energy
Cancellation Report	The cancellation report will be sent to CNSI by DOL programs. Once received, the user will cancel the corresponding payment records.  To perform the task, Ops team needs the following information: A. Program B. Cancellation report Attachments	<ul style="list-style-type: none"><li>• Black Lung</li><li>• Energy</li></ul>