



## **Desk Review Alerts**

### **Issue: Capturing all Desk Review Alerts**

PIA does not have a report function to pull a comprehensive listing of the AAA's Desk Review Alerts received. The AAA's have 2 mechanism to identify desk reviews, the Alert function and Email option. Desk Review Alerts are sent to an assessor if they were previously assigned the profile or a supervisor if the profile is unassigned. This issue has been resolved by AAA's developing a process that captures all of their desk review alerts. This document provides some of the most widely used processes that work best for the AAA's. AWP encourages you to adopt one of the processes below.

### **Definitions:**

- Unassigned PIA Profiles- Profiles that have not been assigned to an assessor
  - The Supervisor receives the alert
- Assigned PIA Profiles- Profiles that have been previously assigned to an assessor
  - The Assessor receives the alert.

### **Processes developed by AAA's**

#### ***Assessors notify their supervisor of Desk Review Alerts received***

1. The supervisor checks their alerts tab each day to capture the unassigned Desk Review Alerts.
2. The supervisor downloads the Alerts into excel
3. The excel spreadsheet is filtered for Desk Review Alerts
4. Supervisor goes through the Alerts and assigns to an assessor
5. Each morning the assessors check their Alerts to capture the assigned Desk Review Alerts
6. The Assessor then emails the PIA ID of any Desk Review Alerts received
7. The supervisor checks to see if a desk review is needed and assigns to the appropriate assessor
8. The supervisor also has a master spreadsheet that they keep with all the Desk Review Alerts received, so they can track them.

*Things to remember:* The supervisors rely on the assessor sending an email each day. If an assessor is out of the office arrangements must be made to ensure all Desk Review Alerts are received.

### ***Using the Desk Review Email option***



1. The supervisor checks their alerts tab each day to capture the unassigned Desk Review Alerts.
2. The supervisor downloads the Alerts into excel
3. The excel spreadsheet is filtered for Desk Review Alerts
4. Supervisor goes through the Alerts and assigns to an assessor
5. Each morning the assessors check their emails to capture the assigned Desk Review Alerts
6. The Assessor then forwards the emails of any Desk Review Alerts received
7. The supervisor checks to see if a desk review is needed and assigns to the appropriate assessor
8. The supervisor also has a master spreadsheet that they keep with all the Desk Review Alerts received, so they can track them.

*Things to remember:* The supervisors rely on the assessor sending an email each day. If an assessor is out of the office the supervisor must have access to the assessor's email.

### ***Assessors complete desk reviews on the Desk review Alerts they received***

1. The supervisor checks their alerts tab each day to capture the unassigned Desk Review Alerts.
2. The supervisor downloads the Alerts into excel
3. The excel spreadsheet is filter for Desk Review Alerts
4. Supervisor goes through the Alerts and assigns to an assessor
5. Each morning the assessors check their Desk Review Alerts
6. The Assessor then checks to see if the Alert meets criteria for completing a desk review
7. The Assessor completes the desk review if it meets the criteria.
8. The Assessor emails the supervisor each day the PIA profiles of the Desk review alerts received.
9. The supervisor also has a master spreadsheet that they keep with all the Desk Review Alerts received, so they can track them.

*Things to remember:* The supervisors rely on the assessor checking the Desk Review Alert and completing the desk review if needed. If an assessor is out of the office arrangements must be made to ensure all Desk Review Alerts are received.

### ***Reassigning Profiles***

1. After a FED is completed the supervisor reassigns the PIA profile to an assessor who is a back-up and does not complete FEDs regularly.



2. The supervisor checks their alerts tab each day to capture the unassigned Desk Review Alerts.
3. The supervisor downloads the Alerts into excel
4. The excel spreadsheet is filter for Desk Review Alerts
5. Supervisor goes through the Alerts and assigns to an assessor
6. The Supervisor has access to the back-up assessors PIA log in
7. The Supervisor logs into the back up account
8. The supervisor downloads the Alerts into excel
9. The excel spreadsheet is filtered for Desk Review Alerts
10. Supervisor goes through the Alerts and assigns to an assessor
11. The supervisor also has a master spreadsheet that they keep with all the Desk Review Alerts received, so they can track them.

*Things to remember:* The supervisor must reassign the cases to the back-up account as soon as the FEDs are completed to ensure the Desk Review Alerts are sent to the back-up assessor.

### **Unassigning Profiles**

1. After a FED is completed the supervisor unassigns the PIA profile from the assessor
2. The supervisor checks their alerts tab each day to capture the unassigned Desk Review Alerts.
3. The supervisor downloads the Alerts into excel
4. The excel spreadsheet is filter for Desk Review Alerts
5. Supervisor goes through the Alerts and assigns to an assessor

*Things to remember:* Since all the PIA profiles are unassigned then the supervisor will receive all of the Desk Review Alerts