

# IHSC Task Management System Guide

July 2021



# ICE

ICE Health Service Corps

## FOREWORD


This U.S. Immigration and Customs Enforcement (ICE) Health Service Corps (IHSC) document, *IHSC Task Management System Guide*, supplements IHSC Directive 01-51, *IHSC Task Management*.

This guide explains concepts, assigns responsibilities, and details procedures for receiving, initiating, and responding to requests for information (taskings or tasks), and details ways to maintain visibility from task origination to task completion.

The intended audience includes all IHSC personnel who process, coordinate, contribute to, and approve tasks. This includes task managers, action officers, subject matter experts, and clearing officials as defined in IHSC Directive 01-51, *IHSC Task Management*.

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## I. INTRODUCTION

### A. Purpose and Background

The Taskings Program is IHSC's conduit through which the agency sends official information and statements with individuals and organizations external to IHSC. Managed by the Taskings and Program Support Unit (TPSU), IHSC uses the IHSC Task Management System (ITMS) to centrally manage all requests for information or "tasks." ITMS is accessible to IHSC staff via the main IHSC SharePoint page under Taskings, or via the main TPSU SharePoint site. This guide contains essential information to help ITMS users navigate the system.

ICE Enforcement and Removal Operations (ERO) Taskings Program (ERO-T) enters IHSC contributions into the ICE Correspondence and Task Tracking (ICATT) system. ERO-T sends requests from the ERO Executive Information Unit (EIU) and ERO Administrative Inquiry Unit (AIU). Task managers upload official IHSC responses to ERO Tasker 2.0, ERO's electronic task management system. IHSC personnel do not respond to tasks via ICATT or ERO Tasker 2.0.

IHSC receives hundreds of requests for information (taskings or tasks) each month. While some tasks are a one-time request, others require follow up, are recurrent in nature, or may reopen months after the initial task closed.

### B. IHSC Task Management System Overview

ITMS is a SharePoint-based platform that allows multiple users to view current and previous tasks and their status, transparently view and manage the task workload, as well as catalogue all task interactions and responses. The system prevents duplication, increases efficiency and resource allocation, enables task prioritization, and documents official responses. ITMS enables TPSU and senior leadership to track all requests and monitor workloads across units and personnel.

Using ITMS, IHSC leadership and staff can track all task types described in IHSC Directive 01-51, *IHSC Task Management*. ITMS is the preferred system for processing, tracking, and maintaining a historical record for all IHSC tasks. Once entered into ITMS, task managers and other ITMS users assign, process, and route in accordance with Appendix A of IHSC Directive 01-51, *IHSC Task Management*, which describes roles, responsibilities, and processes for different types of tasks.

### C. ITMS Task Types

ITMS includes features to process the various tasks IHSC receives. The task manager enters basic information for all new entries into ITMS, using the "Common"

tab. Other tabs in ITMS enable task managers to enter additional information specific to the type of task (administrative; medical complaint; information request; memo; ERO task; and audit).

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**Common.** Information on this page includes ITMS number (automatically generated); requestor; task authority; case number; task type; start date; internal due date; date due to authority; extension date; priority (low, medium, high); task action (stand down; work; review); unit; assignee; carbon copy (cc); delegate; task instruction; and comments.

Task types include:

- Medical complaints
- Medical records
- Medical declaration
- Information request
- Media query
- ERO task
- Audit
- Recommendations memo
- Expert memo

- Corrective action plan (CAP)
- Site visit information request
- IHSC internal
- Short form complaint – Civil Rights and Civil Liberties (CRCL)
- Informal resolution
- Policy
- Reasonable accommodation (RA)
- Freedom of Information Act (FOIA)
- FOIA – coronavirus (COVID-19)
- Medical complaint – COVID-19
- Other

**Administrative Functions.** This page allows task managers to follow up on tasks, annotate when a task is overdue, and document when the Task Authority returned with additional questions.

**Medical Complaints.** This page includes fields for: detainee name; alien number; IHSC facility name; inter-governmental service agreement (IGSA)<sup>1</sup> facility name; medical complaint type; and findings. Medical complaint types include medical; dental; mental health; medication access; hunger strike threat; ‘self-harm threat’; pharmacy services and other. Findings include substantiated and unsubstantiated categories. ITMS connects with the Medical Complaints Tracking System (MCTS), which is IHSC’s archive of closed medical complaint tasks since 2015. IHSC retains MCTS as a historical reference only, for archived medical complaints from 2015 through approximately October 2019.

**Information Request.** This page includes fields for: detainee name; alien number; IHSC facility; non-IHSC facilities; and information request type (medical records, synopsis of care, policies, investigative records, and other).

**Memos.** This page includes fields for IHSC facility or non-IHSC facilities.

**ERO Tasks.** This page includes fields documenting ERO task type and ERO task code. Task types include reoccurring bi-weekly; reoccurring quarterly; reoccurring semi-annual; reoccurring annual; short turnaround; or new.

**Audit.** This page includes fields documenting audit type and audit frequency. Audit type includes: Government Accountability Office (GAO); Office of Inspector General

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<sup>1</sup> Refers to non-IHSC-staffed facilities. Terminology will change in ITMS 2.0, which is under development.

(OIG); ICE credential inventory; physical property inventory; self-inspection program; congressional justification; and financial disclosure. Audit frequency is either quarterly, semi-annual, or annual.

#### D. ITMS Status Categories

ITMS categorizes tasks according to their status, described below.

**Pending:** The task requires further instruction or information before the task manager assigns it to the action officer.

**Assigned:** Assigned to action officer (depending on nature of task) for action and task completion.

**Delegated:** The action officer delegated the task to a designated individual, known as the “designee” for completion. Examples of designees include subject matter experts or program managers.

**Delegated Task Completed:** The designee completed the task. The task is now ready for the action officer’s review. The designee should notify the action officer to review the response. The action officer can select “task submitted to HQ” for single unit or division responses; or for tasks involving multiple divisions or units, notify the task manager that the unit response is complete.

**Task Submitted to Headquarters (HQ):** This status indicates the responses are now ready for HQ-level review and clearance. The action officer submits their response to tasks involving only their unit or division by selecting “task submitted to HQ.” For tasks involving multiple divisions or units, the task manager selects “task submitted to HQ” once all action officers have notified the task manager their unit completed the task.

**Task Sent to Assistant Director (AD):** Task sent to IHSC clearing official for review and clearance as a representative and on behalf of the IHSC AD.

**AD Cleared:** The AD or AD’s representative, serving as the IHSC clearing official, reviewed and cleared the task for dissemination.

**Task Submitted to Authority:** Task manager submitted the cleared task to the Task Authority; the task is now complete and considered closed in ITMS.

**Re-opened:** Response was either: not satisfactory and requires revision before re-submission to Task Authority; or the Task Authority has a relevant follow-up question to the previously closed task, now re-opened, to address the follow up. ITMS automatically sends an email to action officers and designees when the task manager re-opens a task, clearing officials may also re-open a task.

## II. IHSC STAFF RESPONSIBILITIES

Refer to IHSC Directive 01-51, *IHSC Task Management*, for a complete description of roles and responsibilities. This section identifies additional responsibilities not addressed in the directive.

### A. TPSU Chief

Routinely monitors ITMS, tracks and assigns tasks, and monitors due dates and workload across units and TPSU personnel.

Collaborates with task managers to ensure TPSU acts to address tasks immediately upon receipt and follows tasks through to completion.

Manages and maintains visibility of all projects and tasks received from external sources, as well as those generated by IHSC leadership.

Uses ITMS data to generate reports and evaluate program performance.

Advises and consults with ICE, ERO, and IHSC components and staff regarding the IHSC task management function.

### B. Task Managers

Collaborate with the TPSU chief and Taskings Program team members to address tasks immediately upon receipt.

Enter tasks into ITMS upon receipt. Exceptions include requests sent via email with a requested response date and time within less than 24 hours of receipt. Task managers enter these tasks retroactively into ITMS for records management.

Analyze and triage the request prior to assigning the task to the appropriate action officer(s) in ITMS. Assign tasks according to IHSC Directive 01-51, *IHSC Task Management*, Appendix A.

Coordinate with action officers to complete tasks on time, to the extent practicable.

Use ITMS to assign, track, and respond to tasks. Enter comments into ITMS to document actions taken and pertinent updates.

Review responses to complex tasks that involve multiple divisions to ensure a coordinated and complete reply for the specific request.

Liaise with IHSC clearing officials to clear tasks in accordance with Appendix A.

Respond to tasks in the same manner received, either by email or the ERO Tasker 2.0 system.



### C. Unit Chiefs, Discipline Chiefs, and Program Leads

Routinely monitor ITMS to track tasks assigned to their units.

May appoint an action officer for their respective area of responsibility or serve in the action officer role directly.

May function in different roles (e.g., action officer or clearing official) depending on the type of task. Refer to IHSC Directive 01-51, *IHSC Task Management*, Appendix A.

Receive tasks via ITMS, review tasks, and use ITMS to delegate tasks, if needed.

Ensure unit appropriately and completely responds to assigned tasks on time, to the extent practicable. If delegated, collaborate with action officers to track and complete tasks.

Enter comments into ITMS to document actions taken and pertinent updates.

Review and approve tasks on behalf of their unit in ITMS.

Clear responses through division leadership prior to responding to TPSU, to ensure their division-level awareness and approval.

Respond to tasks using ITMS on behalf of their unit; may delegate this step to the action officer.

### D. Action Officers

Depending on the type of task, several IHSC positions may perform this function. Refer to IHSC Directive 01-51, *IHSC Task Management*, Appendix A.

Receive assigned tasks via email from ITMS. In rare instances when the task requires a response within a few hours, or less than one business day, the action officer may receive an email directly from (b)(7)(E)@ice.dhs.gov. Once assigned a task, the action officer owns the task until completion.

Choose to directly coordinate the response; delegate the task to another staff member (e.g., subject matter expert or program manager); or defer the response to another IHSC division, unit, office, program, facility, or staff member. If a deferral, the action officer should annotate the action in ITMS, within the comment section, and notify the task manager by emailing (b)(7)(E)@ice.dhs.gov.

Respond to tasks in the manner received (via ITMS or email to (b)(7)(E)@ice.dhs.gov).

Enter status updates to task managers via ITMS (preferred) or email. If using ITMS, enter comments to document actions taken and pertinent updates.

Use ITMS to develop and post final documents, as appropriate.

If designated as an action officer by a unit chief, discipline chief, or program lead, clear the response through the chief or lead prior to submission to HQ.

Communicate all task-related emails and correspondence to

**(b)(7)(E)** @ice.dhs.gov.

#### E. Designees

Receive tasks from their respective division, unit, or facility action officer and assist in responding to the request for information.

Coordinate with designated action officer to respond to the tasks in ITMS.

Ensure the response is complete and fully addresses the specific request.

Respond to all tasks as assigned, and within the specified time frames, to the extent practicable.

#### F. Clearing Officials

The IHSC assistant director (AD) is IHSC's ultimate decision-maker and clearance authority. The AD may delegate this clearance authority to senior leadership (chief of staff or deputy assistant director) for tasks that do not require senior executive service (SES) clearance. Refer to IHSC Directive 01-51, *IHSC Task Management*, Appendix A, for a list of clearance officials by type of task.

Review and clear official IHSC responses to requests for information made by organizations external to IHSC.

### III. PROCEDURES

Appendices D through F illustrate the task management processes and workflow.

#### A. Create a New Task

TPSU uses ITMS to generate an original task. In rare instances, task managers may, initially, send short turnaround requests via email to expedite the process, then retroactively enter the task into ITMS.

TPSU triages the task to determine the nature of the task, time frame to complete the task, and level of action required (work; review; stand down).

**Work** – take action to complete the task.

**Review** – informational; no action required.

**Stand down** – halt processing action; no further action required until further notice.

The task manager creates a 'New Item' in ITMS, completes all data cells as applicable and appropriate, and lists the action officer responsible for completing the task in the "Assignee" field.

Includes the action officer's chain of command (i.e., first line supervisor and unit chief) in the 'cc' field in the task.

ITMS automatically generates and sends an email to the assigned action officer and those listed in the 'cc' field immediately after the task manager clicks "Save." This email is from (b)(7)(E)

IHSC personnel should not respond, or send task-related emails, to no- (b)(7)(E) Staff should send all task-related correspondence to (b)(7)(E)@ice.dhs.gov.

#### B. Receive and Develop a Response to a Task

The action officer must complete the task as instructed.

If necessary, the action officer may delegate the task to a subject matter expert by selecting "Edit Item" and entering the individual's name in the "Delegate" field and clicking "Save."

Generally, the action officer should use their own expertise, or solicit the necessary information from subject matter experts, to develop a response and forward the response to their immediate supervisor (if applicable) and/or unit chief for review.

Action officers should coordinate responses from multiple individuals within their unit or facility and draft a single consolidated response, if applicable.

Upon task completion, the action officer or delegate submits the task response to the task manager in ITMS by changing the Task Status to "Task Submitted to HQ" and clicking "Save." If clarification is required, the action officer may re-delegate the task. Refer to Appendix C for additional instructions for how to respond to an assigned task.

IHSC Headquarters (HQ). Unit chiefs must ensure the response is appropriate and complete. If the unit chief delegates the task to a staff member, the staff member's/action officer's supervisor and/or unit chief should review the response prior to submission to the task manager.

Field. Responses from the field may require a review by clinical, administrative, and/or regional staff prior to submitting the response to HQ. Action officers ensure all applicable levels in the field review the draft, especially if the response involves more than one facility or position at a facility. The action officer should make any necessary edits based on the review(s).

### C. Clear and Respond to the Task

Once all HQ and field reviews are complete, the action officer submits the response to their respective unit chief for review.

The action officer must clear the response through their division prior to submission into ITMS. The Task Manager facilitates final clearance as specified in IHSC Directive 01-51, *IHSC Task Management*, Appendix A. In several instances, the unit chief is both the action officer and clearing coordinator (one in the same). The action officer must annotate and/or document review completion and actions via the comment box in ITMS.

The action officer responds to the task in ITMS.

Task managers conduct a secondary review to ensure the response complies with the task or request.

For complex requests, task managers may coordinate meetings among stakeholders and partners to prepare the response for final submission, if needed.

Task managers may submit responses to the IHSC Communications Unit (ICU) for professional editing, if needed.

Once the IHSC clearing official reviews and approves the response, the task manager submits the response to the requestor, as instructed.

The task manager closes the task in ITMS by changing the task status to "Task Submitted to Authority." This action closes the task in ITMS.

The task manager may return the task to the action officer for follow up or further clarification, if needed.

For short turnaround requests and responses coordinated via email, task managers retroactively enter the task in ITMS to ensure a complete historical record.

### D. Reopening Tasks in ITMS

Certain tasks involve follow-up requests for information or recurring updates, even after IHSC closes the request in ITMS.

The task manager may return the task to the action officer for follow-up or update, if needed.

The process for reopening a task in ITMS follows the same steps as creating a new task. Task managers enter a note into the re-open instructions section, describing the additional required information and reason for reopening the task.

#### **IV. APPENDICES**

**Appendix A. List of ITMS Categories by Task Type**

<b>Task Type</b>	<b>Action Officer</b>	<b>Clearance Coordinator</b>	<b>IHSC Clearing Official*</b>
DHS OIG audits	HQ: Unit Chief Field: Varies	Unit Chief	DAD-CS, CoS, AD
GAO inquires, audits, and investigations	HQ: Unit Chief Field: Varies	Unit Chief	DAD-CS, CoS, AD
Senior leadership request for information	HQ external: DADs HQ internal: Unit Chief Field: Varies	Unit Chief	External to IHSC: AD, CoS, or DAD Internal to IHSC: DAD or Unit Chief
Media inquires	DCOS, ICU Chief or designee	Unit Chief	IHSC CoS or DCoS
Medical care expenditures (Quarterly Budget Formulation/Performance Measures)	Resource Management Unit (RMU) Chief, Health Information Technology Unit (HITU) Chief, Health Plan Management Unit (HPMU) or designee(s)	Task Manager	IHSC DAD
Medical complaints	HQ: MCMU and HOU Field: Regional HSA or Region FMC Clinical Services staff	Task Manager	Health Care Compliance Consultant
Medical Payment Authorization Request (MedPAR) information	HQ: HITU Chief and HMPU Chief or designee(s) Medical Claims Program; Health Records and Technology Office (HRTO)	Task Manager	DAD of Health Care Compliance

<b>Task Type</b>	<b>Action Officer</b>	<b>Clearance Coordinator</b>	<b>IHSC Clearing Official*</b>
Medical records	HQ: HITU Records and Information Management (RIM) Office, HRTO, MCMU, HOU Field: Regional HSA or Regional FMC	Task Manager	TBD
Corrective Action Plans	MQMU	Unit Chief	DAD-HCC
Root cause analysis	MQMU	Unit Chief	DAD-HCC
Routine and ad-hoc reports	HQ: Unit Chief Field: Varies	Unit Chief	DAD, CoS, or AD
Subject matter expert statements	HQ: Unit Chief Field: Varies	Unit Chief	DAD, CoS, or AD
Questions for the record (QFR)	HQ: Unit Chief Field: Varies	Unit Chief	DAD, CoS, or AD
Other requests for information	HQ: Unit Chief Field: Varies	Unit Chief, Task Manager	DAD, CoS, or AD

## Appendix B. Views in ITMS

This section orients users to the different views within ITMS, and highlights functions users can perform on each page. TPSU recommends ITMS users bookmark the following link to readily access the page:

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**Create a new task.** Primarily used by TPSU task managers, this view enables users to log a new request, initiate a workflow, and coordinate IHSC actions to complete the task.

Task managers:

- Create new tasks using this view, ensuring all fields are complete and relevant documents attached.
- Choose the appropriate tab on the top of the page.
  - Assign task type, due dates, priority level, task action, and assigns it to appropriate IHSC component and action officer.
  - Include relevant information and instruction to assist action officers completing the task.
  - Attach documents as needed.



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**View active tasks.** Users can view all active tasks using this page. The search features allow users to narrow their search by entering either the ITMS number, detainee's alien (A) number, or case number. The case number comes from the subject line of the incoming email. CRCL, FOIA, and ERO normally assign each task a number. *Note:* If the task involves multiple detainees, annotate additional names and A numbers in the comments section.

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**My tasks.** Users may view all current and past tasks assigned to them, organized by task status.

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**View tasks due in 30 days.** This list allows users to view all tasks due within the next 30 days, searchable by ITMS number, case number, due date, assignee, delegate, task type, and facility. TPSU recommends unit chiefs and action officers view this page at least weekly.

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**Overdue tasks.** This view lists all tasks with past due dates. The list is searchable by ITMS number, case number, task authority, due dates, requestor, assignee, designee, task type, and status.

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## Appendix C. How to Review an Assigned Task

This section explains how action officers and designees will receive, review, and respond to tasks using ITMS.

1. **Receive notification via email.** Action officers receive a notification email from ITMS. Once received, action officers (assignee) should take immediate action to view the request by clicking the link, noting the internal due date.

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2. **View the task.** Action officers should view the task by clicking the hyperlink in the email marked “Click here.” To edit the task, click on the “Edit Item” button.

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3. **Delegate if needed.** Action officers may delegate the task to others who are more appropriate to respond, such as program managers or subject matter experts. To delegate, action officers should click "Edit Item." Enter the delegate's name in the Delegate block. Add additional instructions if needed. Add a note in the Comments block to document the action. Mark the Task Status block as Delegated. Click Save to retain changes.

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4. **Respond in ITMS.** Action officers or delegates coordinate the response and enter responses into ITMS, documenting updates in the comments section. Action officers and delegates should review all instructions and attachments, draft responses in the manner requested, and upload attachments into ITMS once all appropriate coordination and reviews are complete.

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For tasks that involve one component: The delegate may mark the Task Status block as “Delegated Task Completed” and click save to submit the task for action officer (assignee) review.

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For tasks involving more than one component (units or divisions): The delegate should communicate to their respective action officer that their review is complete. In this instance, the delegates may skip this step to ensure the task is not marked completed until all delegates and action officers completed their portions of the task. Task managers will facilitate system updates. ~~in~~

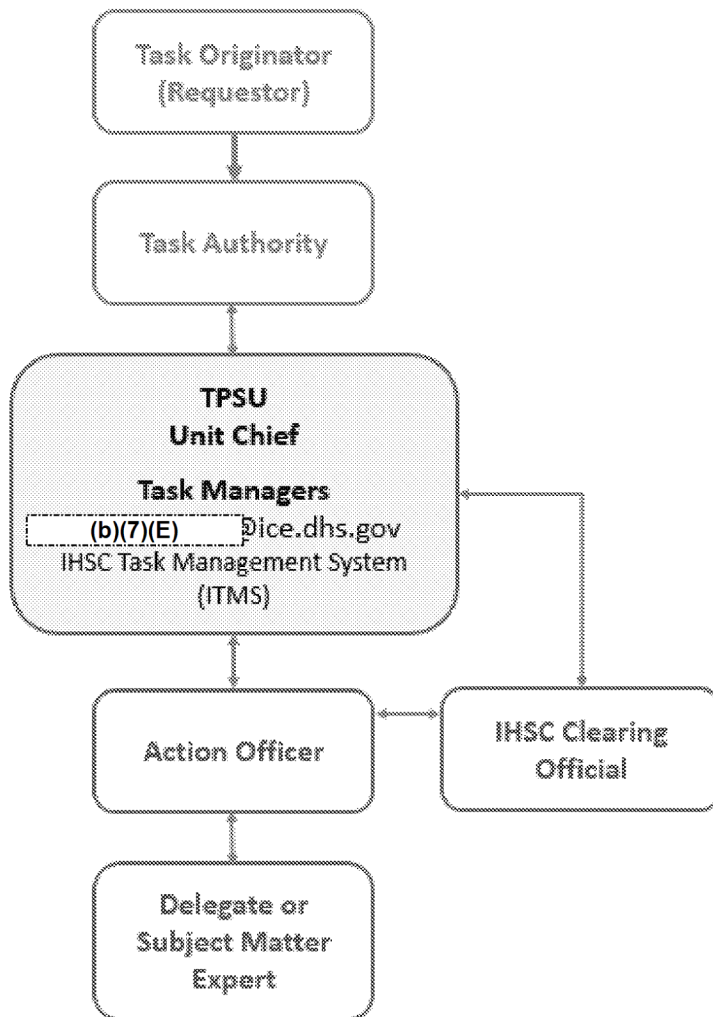
Action officers must review and clear the response through their respective unit chief prior to submitting the response to TPSU. For tasks that involve one component: action officers mark the Task Status block as “Task Submitted to HQ” and click save to submit to the response to the TPSU task manager.

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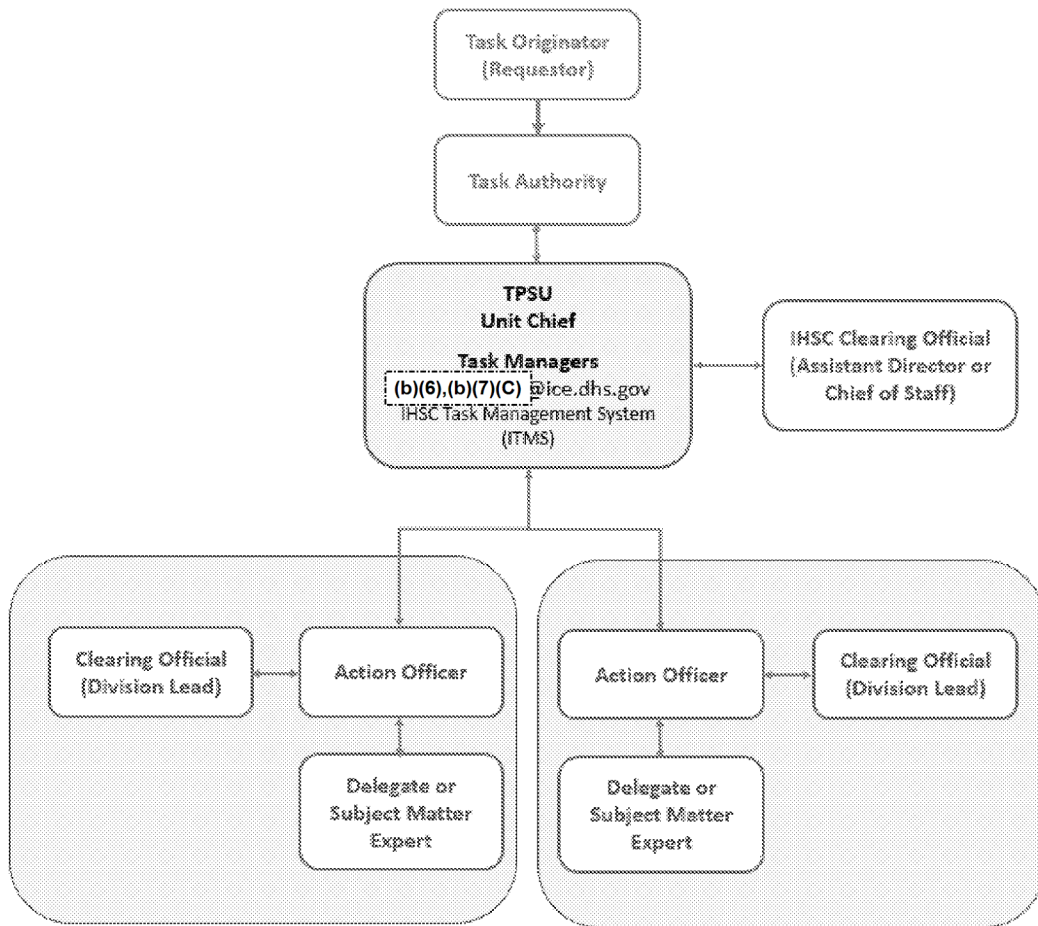
For tasks involving more than one component (units or divisions): The action officer should communicate to the task manager that their review is complete. In this

instance, the action officer may skip this step to ensure the task is not marked complete until all action officers have completed their portions of the task. Task managers will facilitate system updates.

#### Appendix D. Task Management Process – Single Division (Simple Tasks)



Appendix E. Task Management Process – Multiple Divisions (Complex Tasks)



## Appendix F. IHSC Task Management Workflow

