CLIENT-FACING TRAINING WEBINAR

Introduction to Task Ownership

GREEN CHECK

Agenda

- Introduction to Tasks on Green Check

- Understanding Global Task Ownership 🆕 🎉

- Product Demo: Exploring Global Task Ownership in Action

- Best Practices for Task Adoption

- Q&A

Introduction to Green Check Tasks

- Tasks & Assignments lives in your Green Check ecosystem and was initially created so you have ONE place to view and track cannabis program "work"

- This includes the types of tasks that are inherent to Green Check, and other tasks you create to help facilitate your program

However, the task system in its initial state can be "noisy" – all tasks go to admins by default and there's no clear indication of who is responsible for what... *until now*!

Easily create a task from a comment when mentioning someone, @Cherie LaFlamme

☑ Create Task   Post

Assignee*

Select a user or group   ⌄

⌄

🔒 Sophia Rodriguez

🔒 Ethan Reynolds

🔒 Isabella Park

⌄   👥 Admin Group

👥 Standard User Group

n this account.   👥 BSA Group

Create Task

What types of tasks are available?

There are 3 types of tasks in Green Check...

Search 🔍   Last 30 Days ⌄   ⧩⁸   Create Task

🟢 Show Auto-Generated Tasks

Associated With	Status	Created	Due Date
FinCEN Reports	Open	05/03/2024	05/19/2024

Manual Internal/External Tasks

Create Task

Task created successfully.

Choose Task Type ❓

◉ Internal ◯ External

Task Name*

An internal task example

Account*

Mary Jane's Apothecary ⌄

Associated With*

Accounts ⌄

Task Description*

Isabella, please follow-up on this account.

Assignee*

Select a user or group

  👤 Sophia Rodriguez

  👤 Ethan Reynolds

  👤 Isabella Park

  👥 Admin Group

  👥 Standard User Grou

  👥 RSA Group

Mary Jane's Apothecary

Comments | Activity | Archived

External **Internal**

Easily create a task from a comment when mentioning someone, @Cherie LaFlamme

☑ Create Task

Post

Tasks from Comments

Auto-Generated Tasks

Tasks

Search 🔍 | Last 30 Days ▾ | ▽ ⑧ | Create Task

(Internal) External

🟢 Show Auto-Generated Tasks

Task Name	Assignee	Account	Associated With	Status	Created	Due Date
Complete FinCEN SAR	Multiple ❓	Fritsch's Naturopathic Care	FinCEN Reports	Open	05/03/2024	05/19/2024
Complete FinCEN SAR	Multiple ❓	Mary Jane's Apothecary	FinCEN Reports	Open	05/01/2024	05/19/2024
Complete FinCEN SAR	Multiple ❓	Fritsch's Naturopathic Care	FinCEN Reports	Open	05/01/2024	06/01/2024
Complete FinCEN SAR	Multiple ❓	Fritsch's Naturopathic Care	FinCEN Reports	Open	04/28/2024	06/01/2024
Complete FinCEN SAR	Multiple ❓	Mary Jane's Apothecary	FinCEN Reports	Open	04/28/2024	09/01/2024
Complete FinCEN SAR	Multiple ❓	Fritsch's Naturopathic Care	FinCEN Reports	Open	04/28/2024	09/01/2024
Complete FinCEN SAR	Multiple ❓	Fritsch's Naturopathic Care	FinCEN Reports	Open	04/28/2024	09/01/2024

Benefits of the Green Check Task System

- Understand the work being assigned and completed to facilitate the cannabis banking program

- Accountability for all compliance and program tasks

- See at-a-glance who is working on what, and who has the capacity to take on more

- Removes the manual effort of sending an email or making a phone call and remembering to follow-up

🆕 🎉 **Global Task Ownership! Available now!**

- Allows admins to set owners (either groups or individuals) to receive specific types of tasks

- Owners will receive notifications for the following auto-generated tasks:
  - FinCEN, Deposits (Manual), Monitoring Reviews. Accounts, and Core Data

- This means more <u>discreet</u> notifications and assignments across Green Check. Previously, all users with specific permissions received tasks (and Admins received *everything*)

  - However, if you like the current permission-based assignment, still use that by keeping the ownership toggles turned off. This means nothing slips through the cracks

Ownership

On 📄 **FinCEN Ownership**
Last updated on 05/14/2024 by Sophia Rodriguez

On 📋 **Deposits Reconciliation Ownership**
Last updated on 05/26/2024 by Ethan Reynolds

On 📲 **Monitoring Reviews Ownership**
Last updated on 05/26/2024 by Isabella Park

On 👤 **Accounts Ownership**
Last updated on 05/14/2024 by Ethan Reynolds

On 🗄 **Data Ownership**
Last updated on 05/08/2024 by Sophia Rodriguez

Diving into different types of Task ownership

	Permission-Based Ownership	App Area Ownership	*Future: CRB Ownership*
Status	Current state	Launched today - now available 🥳	Future state (not yet built)
How To	Keep things as is; leave app area toggles off	Turn app area toggles ON and assign to specific users/groups	Will be able to assign app areas PER CRB
Example	All admins receive ALL tasks/notifications and are listed as the task assignee.	FinCEN is owned by Michael Jones who receives ALL notifications relating to all auto-generated FinCEN reports; he is also the task assignee.	Cherie owns Monitoring for Greenie LLC, but Paul owns Monitoring for Purple Haze LLC and each of them respectively receive tasks for those accounts.
Relation to Groups & Access	Groups have permissions; permissions will determine who gets tasks	App Area owner receives tasks; however, groups still control ACCESS and visibility to different parts of app.	CRB Owners will receive tasks; however, groups will still control ACCESS and visibility to different parts of app.
Benefit	All users with the right access receive EVERYTHING. *	Less "noise" and distractions, more oversight, a clear understanding of WHO is responsible for WHAT.	More flexibility, especially in larger programs and teams.

Demo!

SET TASK OWNERSHIP AND CREATE MANUAL TASKS!

GREEN CHECK

Recommended tasks & use cases

- Conducting and scheduling site visits

- Team collaboration (for example, in-branch account opening, compliance operations)

- Monitoring review cases (validating vendors, random check pull and review)

- Multi-step tasks

- Follow-up with CRBs

Create Task

✔ Task created successfully.

Choose Task Type ❓
- ⦿ Internal
- ◯ External

Task Name*

An internal task example

Account*

Mary Jane's Apothecary ⌄

Associated With*

Accounts ⌄

Task Description*

Isabella, please follow-up on this account.

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👥 Admin Group

👥 Standard User Grou

👥 RSA Group

Increasing task adoption

- Set "owners" for app areas for more discreet assignments

- Use the filters to see task by assignee or creator, and more

- Use all the different task types to foster collaboration and communication within the app instead of performing otherwise manual efforts

- *Let us know if there are task-related feature requests in the ideas portal!*

Search

Last 30 Days

8

Create Ta

to-Generated

Associated

Due Date

Filters

Clear All

Search

FinCEN Repo

05/19/20

> ✓ Status

FinCEN Repo

05/19/20

> ✓ Assignee

> ✓ Account

FinCEN Repo

06/01/20

⌄ ✓ Created By

FinCEN Repo

06/01/20

✓ Isabella Park

FinCEN Repo

09/01/20

✓ Ethan Reynolds

FinCEN Repo

09/01/20

✓ Sophia Rodriguez

FinCEN Repo

✓ Cherie LaFlamme

09/01/20

Cancel

Apply

FinCEN Repo

09/01/20
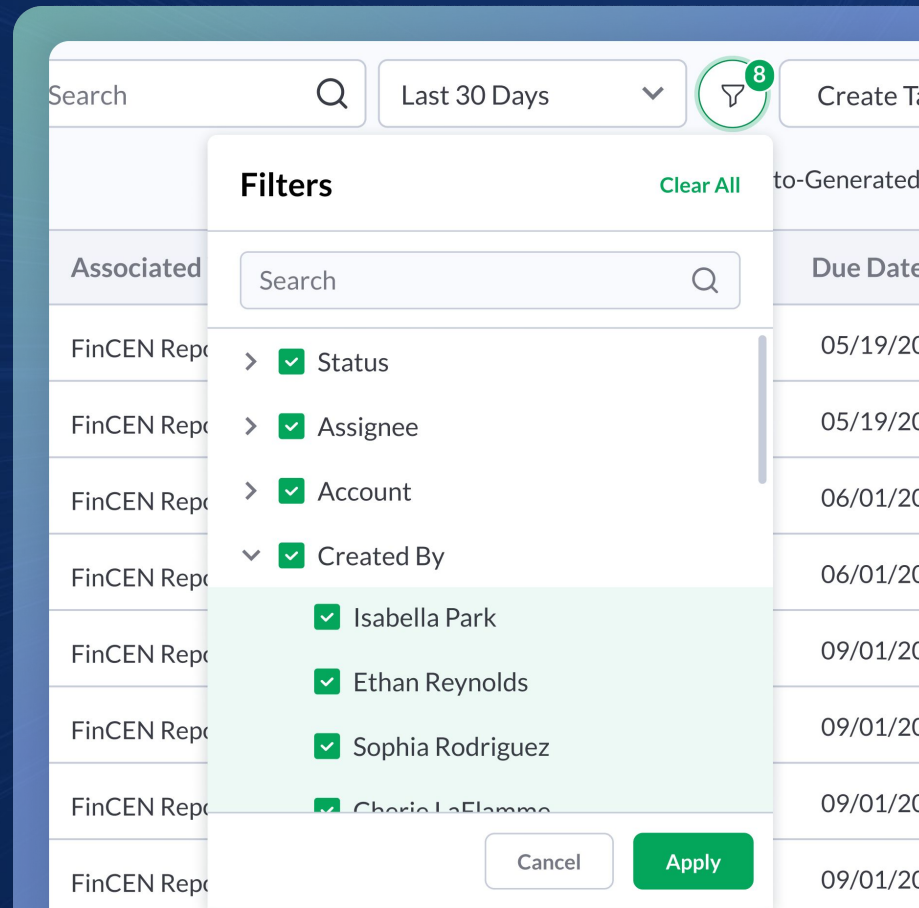
Q&A? Thank you!

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