DDID #	Phase	Task Sub-Category	Requirement Description	Contractor Assumptions	Release
34	1	Base Solution	The CONTRACTOR shall develop and implement a Unified Task Management solution that supports the multiple tasking models in both C-IV and LRS, as follows: 1) Integrate the Team Managed Pre-Migration C-IV solution into the CalSAWS Software code base 2) Create a common task management data model 3) Integrate the LRS automated tasks with the new county driven task activation, assignment and configurability logic (introduced with the C-IV Task solution) 4) Add the C-IV automated task trigger conditions into the CalSAWS Software code base ensuring there is no adverse or negative impact to LRS that would affect Los Angeles County 5) Add auto-assignment of tasks by the system through "round robin" or other workload balancing methodologies 6) Create a task pool where tasks can either be assigned by a supervisor or can be pulled by a caseworker 7) Update the LRS Task Management Dashboard (OBIEE) to account for the system modifications being made as part of migration	- CalSAWS Task Management Solution will support Task Reassignment functionality from C-IV. - CalSAWS Task Management Solution will support Task Bank functionality from C-IV, LRS Task MAQs will convert into Banks. - OBIEE Task Dashboard will be migrated over to new tool prior to Task Management implementation.	21.05
655	1	Work Tasks	The CONTRACTOR shall migrate the Task icon link on the Utilities Navigation Bar to provide access to the My Task and Task Search pages.		20.11
1439	1	Create Tasks	The CONTRACTOR shall update the Error Prone and High Risk Case Flag Administration page, and supporting batch processing, to be configurable by each CONSORTIUM County. The CONTRACTOR shall add a new configurable automated task to generate when an Error Prone or High Risk flag is added to a case.		21.01
1628	1	Create Tasks	The CONTRACTOR shall migrate the existing C-IV automated tasks, as specified in the "Task Management C-IV Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as migrate current task configurations for 39 C-IV Migration Counties into the CalSAWS Software as default settings for the 39 C-IV Migration Counties.	- Approximately 22 C-IV automated actions directly overlap with LRS automated tasks. - Support for mapping CalWIN automated tasks to C-IV automated tasks is not included. - Automated tasks included in this DDID would be set to "Inactive" at cutover for CalWIN counties. - Please refer to CalSAWS Agreement Exhibit U Schedule 1 - Attachment 1 Contractor Assumptions Inventory List, worksheet 'C-IV Automated Tasks'	21.03
1629	1	Create Tasks	The CONTRACTOR shall update the existing LRS automated tasks, as specified in the "Task Management LRS Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as update current task configurations for Los Angeles County into the CalSAWS Software as default settings for Los Angeles County.	- Existing thresholds for authorization based tasks will remain the same, and threshold amounts will not be configurable by county. - Support for mapping CalWIN automated tasks to LRS automated tasks is not included. - Automated tasks included in this DDID would be set to "Inactive" at cutover for CalWIN counties. - Please refer to CalSAWS Agreement Exhibit U Schedule 1 - Attachment 1 Contractor Assumptions Inventory List, worksheet 'LRS Automated Tasks'	21.11
1830	1	Create Tasks	The CONTRACTOR shall update the name, long description and associated trigger for the task "Activity will end in 5 days" to reference 10 days instead of 5 days.		20.11
1831	1	Create Tasks	The CONTRACTOR shall update the long description of the task, "Retro Active Extender" from "Notify eligibility worker of retroactive extender" to "Retro Active extender has been approved. Take appropriate action. <months the extender has been approved for>".	- This requirement will be met with the implementation of DDID 1629 as the LRS Automated Tasks are initialized.	20.11
1832	1	Create Tasks	The CONTRACTOR shall update the task name from "SSS Activity with no Concurrent Activity" to "Specialized Supportive Services Activity with no Concurrent Activity".	- This requirement will be met with the implementation of DDID 1629 as the LRS Automated Tasks are initialized.	20.11
1955	1	Create Tasks	The CONTRACTOR shall create automated tasks for MEDS alerts specified in the "MEDS Alert Message Inventory" appendix, that are received by the CalSAWS Software and do not generate tasks currently. The automated tasks from MEDS alerts must be county configurable to allow authorized users to enable or disable the individual tasks.	- This requirement will be met with the implementation of DDID 1964 and Automated Action SCR associated with from DDID 1967. - Please refer to CalSAWS Agreement Exhibit U Schedule 1 - Attachment 1 Contractor Assumptions Inventory List, worksheet 'MEDS Alert Message Inv'	21.01
2197	2	Create Tasks	The CONTRACTOR shall add the ability for authorized users to create tasks in bulk by uploading a spreadsheet with task details. Users must have the following features available to them: 1) A pre-defined template available for download and modification to then upload for task creation 2) The ability to assign tasks directly to a named worker/bank, or assign tasks automatically based on existing task routing rules 3) The ability to create different types of tasks in the same upload 4) The ability to specify a due date for each task, or have the system determine one based on the task type specified 5) A confirmation page for viewing errors occurring during task creation 6) A preview assignment page to view assignment results prior to distributing tasks 7) A threshold for number of entries to be processed in real time, with higher volumes processed during nightly batch	- Task creation and assignment will occur overnight, unless the number of tasks included on the uploaded file is equal to or below 50. In that case the tasks would be created and assigned in real time. This threshold would be configurable, to allow for adjustment after performance can be measured.	21.03
2209	2	Work Tasks	The CONTRACTOR shall update the Task Management solution to allow authorized users to flag an individual task as "Expedited" when the task is created or after the task has been assigned.		21.11
2225	2	Reassign Tasks	The CONTRACTOR shall update the Task Management solution manual assignment pages so that the user can see a targeted list of staff eligible to receive the task assignment, prioritized in the order for which the Task Management solution uses to assign tasks automatically. This feature must be configurable to be enabled or disabled by county administrators.		21.11

2228	2	Create Tasks	The CONTRACTOR shall update the Appointment Management solution to create a task whenever an appointment is created. The task should be assigned to the same worker to whom the appointment is assigned, and the description should include the basic appointment information. When the appointment or the task is reassigned, then the corresponding task or appointment is reassigned as well. This functionality must be configurable by county administrators.	- Appointments that are reassigned via the Appointment API will also result in task reassignment if the county has elected to use this functionality.	21.05
2230	2	Create Tasks	The CONTRACTOR shall add the ability for authorized users to upload county death and jail information to identify matching persons, and generate tasks for users to review matches and take appropriate action. Three templates must be available for download to support the following processes: 1) County Death Match 2) Jail Incarceration Match 3) Jail Release Referral Each template must be available for download and modification to then upload for matching and task creation. Person matching must be based on name, date of birth, social security number, and CIN if available. A threshold must be established during design for the maximum number of tasks being created to be processed in real time, with higher volumes processed during nightly batch.	- This DDID will be implemented after, or at the same time as, DDID 2197 as it assumes leveraging components developed in that DDID.	21.07
2233	2	Create Tasks	The CONTRACTOR shall update the Task Management solution to allow manual task creation without a case or application reference. Tasks must be accessible through the My Task, Task Search, and Worklist pages using existing search criteria.	- There is no associated supervisor workflow for tasks that do not have a case or application reference. - This DDID is implemented after, or at the same time as, DDID 655.	21.11
2235	2	Work Tasks	The CONTRACTOR shall update the Task Detail page to add a button for viewing documents associated to the task and documents received within a time period after the task was created. The images button must remain accessible on the Task Detail page, regardless of task status.	- Imaging system will support single sign on functionality for CalSAWS credentials.	21.03
2239	2	Assign Tasks	The CONTRACTOR shall update the Task Management solution to reduce the number of tasks automatically distributed to staff based on availability reflected in their appointment and worker schedules.	- Automated task assignment reductions apply to automated distribution in a push model only. Staff is able to self assign, and manually reassign, tasks without restriction.	21.11
2240	2	Work Tasks	The CONTRACTOR shall update My Task, Task Search, and Worklist page so that a user can search for tasks by program status(es) and corresponding status effective date.		21.11
2241	2	Work Tasks	The CONTRACTOR shall update the Task Management solution to allow county administrators to define action steps for each task type that need to be completed or followed up on by workers. By default, workers must complete the action steps before marking the task complete. The solution must allow authorized workers to bypass the action steps and mark the task as complete.	- Task Reports do not require updates to include action steps upon implementation of this DDID. Report enhancements to be requested via CER after implementation.	21.05
2245	2	Assign Tasks	The CONTRACTOR shall update the Task Management solution to allow authorized users to configure task routing rules for images/documents based on program and program status.		21.11
2246	2	Work Tasks	The CONTRACTOR shall update the Task Management solution to allow users to search for tasks by keyword in the Long Description field of the task, search by the user that created the task, or created on date range. The CalSAWS Software will validate that the search scope is sufficiently small and demand greater specificity before running the search on too many tasks.	- Assuming current requirement for minimum search criteria of Case Number, Office, Unit, or Worker is sufficient to contain search scope.	21.11
2247	2	Create Tasks	The CONTRACTOR shall update the Task Management solution to allow authorized users to specify which types of tasks should append to existing/open tasks before creating a new task. The user must be able to specify which types of tasks the new task can be appended to. The assigned worker must be alerted when their task is updated with additional documents.	- Implementation of this DDID will leverage display built in DDID 2249 as a mechanism to alert a worker their task has been updated.	21.03
2249	2	Work Tasks	The CONTRACTOR shall update the Task Management solution to allow users to subscribe to a task. The subscribed users must be able to view a consolidated list of task updates as they happen in near real-time. The subscribers of a task must be viewable within the task detail page.	- Solution will leverage current Task History model to display task updates to subscribers. - Assuming one main panel for real time subscription updates on Worklist and My Task pages.	21.07
2251	2	Work Tasks	The CONTRACTOR shall update the Task Management solution to allow authorized users to configure a task type to generate a new task upon completion.		21.05
2252	2	Oversee Tasks	The CONTRACTOR shall update the Task Management solution to allow authorized users to define and schedule a periodic sampling of tasks. The periodic task sampling results must be viewable to the user that requested it.		21.07
2254	2	Create Tasks	The CONTRACTOR shall update the Task Management solution to allow authorized users to configure task creation and routing rules by Document Type and Form Number/Name. The solution must provide the following configurations: 1) Custom grouping of Document Types and Form Number/Name 2) Configurability on which documents should create tasks and what type of task is created 3) The ability to accept program override(s) for task routing from the imaging solution 4) The option to suppress tasks when there is an upcoming appointment 5) The option to suppress tasks if the scanning user is the same person that would receive the task	- Task API and Imaging solutions will be implemented prior to, or at the same time as, the implementation of this DDID. - Task API solution can require different parameters based on the requesting partner. (i.e. imaging system)	21.03

2275	2	Reassign Tasks	The CONTRACTOR shall update the Task Management solution so that whenever a worker is assigned or self-assigns a task, the worker is simultaneously assigned all available tasks they can work for that same case. This feature must be configurable to be enabled or disabled by county administrators. This functionality must apply to the following reassignment methods: 1) Manual task reassignment 2) Automated task reassignment 3) Get Next reassignment	- County configuration applies to all Offices, Units, Positions within the county. - Task grouping only applies to task types defined by county administators. - Administrative staff will set up and maintain position and staff configutations for the system to determine what skills and classifications a worker has.	21.11
2315	2	Create Tasks	The CONTRACTOR shall update the CalSAWS Software to provide the following GA/GR functionality for the 58 Counties: 1) Prorated benefit amounts based upon the Beginning Date of Aid (BDA) for the GA/GR program 2) Add a hard validation message at EDBC when the GA/GR residency arrival date field on the Residency Detail page is not completed. The validation message shall only display for those counties that opt into the 15-day residency rule. The CalSAWS Software should not allow the user to run EDBC when this validation occurs. A batch exception reason will be added when the case is run in batch 3) Update the Pre-Screening-Mandatory Substance Use Disorder Recovery Program (MSUDRP) page to allow the 58 Counties to add additional pre-screening questions based on each of the 58 Counties GA/GR eligibility rules. The CalSAWS Software shall only display the Pre-Screening questions based on the county of the logged in user 4) Add the ability to display prior GA/GR aid received in other counties within the CalSAWS Software (sanctions, unemployable, employable status, BDA, reapplication within a 12-month period and their time on aid in GR). Note: The requirement is contingent upon county agreement and legal review 5) Create an automatic task when a participant has applied for SSI for the GA/GR program. The task shall be customizable by county and all 58 Counties shall have the ability to opt in/opt out of the task at the time of migration 6) Add the ability to issue benefits on a pending GA/GR program and issue the remainder upon approval as determined by the county 7) Add the ability to determine eligibility for GA/GR aid paid pending based on the eligibility rules of each of the 58 Counties 8) Add the ability to allow each county to determine the income multiplier based on each of the 58 Counties GA/GR eligibility rules 9) Add a verification field on the GR Work Requirement page when a work requirement type has been selected. If the verification field is left pending, it shall populate on the county specific verification checklist for GA/GR. The 58 Counties shall have the ability to opt in/opt out of the functionality at the time of migration 10) Create an automated task when the vendor for GA/GR is no longer going to get paid based on the Money Management Detail page end month. This functionality will be based on each counties GA/GR program rules	(#5 and #10 ONLY)	21.11
2386	2	Create Tasks	The CONTRACTOR shall update the Task Management solution to allow authorized users to void tasks that were created by the bulk upload process.	- This DDID will be implemented after, or at the same time as, DDID 2197 as it assumes leveraging components developed in that DDID.	21.05
2387	2	Assign Tasks	The CONTRACTOR shall update the Task Management solution to take into consideration, the following factors during automated task assignment: 1) Language Skill 2) Culture Skill 3) Staff Classification 4) Max Task Assignment		21.11
2388	2	Assign Tasks	The CONTRACTOR shall update the Task Management solution to include a start date for tasks. The automated task assignment logic will not assign tasks prior to their start date. Tasks must be accessible through the My Task, Task Search, and Worklist pages using existing search criteria.	- Task reports and batch jobs that include status do not require updates to distinguish "Reopened" tasks from "Open" tasks. - User will update due date upon reopening an expired to task, to avoid having the task expire again the next day.	21.11
2389	2	Work Tasks	The CONTRACTOR shall update the Task Management solution to allow authorized users to re-open a task that was previously completed, voided, or expired.		21.11
2390	2	Oversee Tasks	The CONTRACTOR shall update the Task Creation Report to include tasks created through the task bulk upload process.		21.11