CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214929

DDID 655

Task Management

DRAFT

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/7/2020	1.0	Initial Revision	Mayuri Srinivas

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1 OVERVIEW

This design outlines modifications to Task Management functionality within the LRS/CalSAWS System to include a set of Task pages within a separate pop up window accessible with a new navigation link within the Utilities Navigation Bar.

1.1 Current Design

The LRS/CalSAWS System contains a series of Worklist pages allowing county staff to view, manage and work tasks. The LRS/CalSAWS System cannot be navigated while simultaneously viewing/modifying the Task pages.

The C-IV System includes a set of Task pages that function within a dedicated pop up window that can be navigated independently of the main C-IV window. Workers can navigate throughout the C-IV System while working Tasks within the pop-up Task pages.

1.2 Requests

Introduce new dedicated Task pages that can be used to search and work Tasks in an independent pop-up window accessible via a link in the Utilities Navigation Bar.

1.3 Overview of Recommendations

1. Introduce a new Utilities Navigation Bar option titled "Tasks" that will pop-up a new window that includes a group of pages that allow workers to manage Tasks within a dedicated window that can be navigated independent of the LRS/CalSAWS window. Pages included within the pop-up window are:
    a. My Tasks
    b. Task Search
    c. My Banks

    Within the pages above is functionality allowing users to navigate to additional sub-pages such as:
    a. Bank Detail
    b. Task Detail
    c. Select Bank
2. Add functionality that will allow a user to click on a Case Number hyperlink within the Tasks pop-up window and navigate the LRS/CalSAWS main window to the Case Summary page for a Case.

1.4 Assumptions

1. CA-214928 for DDID 34 (Unified Task Management) will be implemented concurrently with this design. This SCR introduces the Bank Detail page which is a necessary component for the My Banks page within this enhancement.

2. All Security Groups and Security Rights used by the pages described in this design are already available in LRS/CalSAWS.

2 RECOMMENDATIONS

This section will outline recommendations to introduce Pop-Up Task Management components to the LRS/CalSAWS System.

2.1 Utility Bar

2.1.1 Overview

This addition to the Utilities section will allow the Users to access the Tasks Pop-Up window and the included pages within LRS/CalSAWS. The Tasks link will display if the User profile contains the Task View or Task Edit security group. Pages included within the Task Pop-Up window are:

- My Tasks Page (Section 2.2)
- My Banks Page (Section 2.3)
- Bank Detail Page (Section 2.4)
- Task Search Page (Section 2.5)
- Task Detail Page (Section 2.6)

2.1.2 Home Page – Utility Bar Mockup

Figure 2.1.2.1 – Utility Bar Mockup

2.1.3 Description of Changes

1. Add a "Tasks" link to the Utilities bar of LRS/CalSAWS System between "Journal" and "Help". See Figure 2.1.2.1 for an example of the placement and the icon that displays.
2. The "Tasks" link will display if the user's security profile contains the "TaskSearchView" security right.
3. When the "Tasks" link is clicked, a 1280 x 1024 pop-up window will open to display one of two pages:
    a. If LRS/CalSAWS is in the context of a case, the window will pop-up to display the "Task Search" page with the Case Number pre-loaded into the search criteria.
    b. If LRS/CalSAWS is not in the context of a case, the window will pop-up to display the "My Tasks" page.

    There can only be one instance of the Task pop-up window open. If the "Tasks" link is clicked multiple times, the single window will refresh

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as appropriate. For example, if a worker logs into LRS/CalSAWS and immediately clicks the "Tasks" link, the Task pop-up will open to display the "My Tasks" page per bullet "b" above. If the worker then enters a case into LRS/CalSAWS to view the Case Summary page and clicks the "Tasks" link again, the Task pop-up window will refresh to display the "Task Search" page per bullet "a" above.

2.1.4 Page Location

N/A.

2.1.5 Security Updates

N/A – The "TaskSearchView" security right is contained within the "Task View" and "Task Edit" security groups, which already exist in the LRS/CalSAWS System.

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 My Tasks Page

2.2.1 Overview

This section will define the specifics of the "My Tasks" page that displays by default in the Task Pop-Up that opens on click of "Tasks" in the Utilities Navigation bar. This page displays Task information for the logged in worker.

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2.2.2 My Tasks Page Mockup

Figure 2.2.2.1 – My Tasks Page Mockup

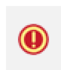
2.2.3 Description of Changes

Add a My Tasks page to the LRS/CalSAWS System. On initial load of the page, Tasks with a status of "Assigned" or "In Process" that are assigned to the logged in worker will display. The My Tasks tab will be accessible if the user's security profile contains the "MyTasksView" security right.

1. **ICON:** HELP – Clicking this button will open the My Tasks Online Help page.
2. Staff – This field will display the staff name of the logged in worker.
3. Worker ID – This field will display the Worker ID being used by the logged in worker. If the logged in worker is associated to multiple Worker IDs, this field will display as a dropdown menu with each associated Worker ID while defaulting to the current Worker ID being used. Selecting a Worker ID from this dropdown followed by the Search button will refresh the results to display Tasks that are "Assigned" or "In Process" for the selected Worker ID.
4. **BUTTON:** Search – When clicked, Tasks displayed in the search results are refreshed to display tasks that match the search criteria.
5. **BUTTON:** Get Next – When clicked, the LRS/CalSAWS System searches each of the Banks the User is associated with to identify the highest priority Task. The Task is then assigned to the User and the Status is updated to "In Process."

   Priority is determined by evaluating the Task's associated Task Type/Sub-Type priority, Due Date, and Creation Date. Tasks with an existing Position assignment will not be reassigned by Get Next. This button will display when the security profile of the logged in user contains the "GetNextTask" security right.
6. <u>Search Results Summary</u>

a. New Assignment Indicator – this column does not have a column header shown on the page. The column will display the New Assignment icon to indicate if the Task is newly assigned to the logged in staff. The user may acknowledge this task and click on the icon, which will remove the icon from display for the Task. If the worker does not click the icon, it will no longer display after the amount of time specified in the Newly Assigned Indicator attribute of the Task Type Detail page. The Indicator will be clickable if the security profile of the logged in user contains the "TaskDetailEdit" security right. The column will display the following indicator icon:

   i. 

b. Priority Icon – this column does not have a column header shown on the page. The column will display the following graphical icons to indicate the priority based on the Task Type Priority for each row:

   i.  - Critical

   ii.  - High

   iii.  - Medium

   iv.  - Low

c. Due Date – the Task Due Date. If the security profile of the logged in user contains the "MyTasksView" security right, the date will display as a hyperlink, otherwise the date will display as plain text. Clicking the hyperlink opens the Task Detail page in View mode.

d. Case – the Case Number associated to the Task. If the Task is not associated to a Case, such as a Clearance Task, this column will be blank. If the security profile of the logged in worker contains the "CaseSummaryView" security right, this field will display as a hyperlink, otherwise it will display as plain text. Clicking the hyperlink will refresh the main LRS/CalSAWS System window to the Case Summary page for the Case.

e. Case Name – The Case Name of the Case associated to the Task. If the Task is not associated to a Case, such as a Clearance Task, this column will be blank.

f. Program(s) – the Program(s) associated with the Task. Tasks that are associated to multiple programs will display a comma-delimited list of the associated program codes. If the Task is not associated to a Case/Program, such as a Clearance Task, this column will be blank.

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g. Category – the Category of the Task.
h. Type/Sub-Type – the Type and Sub-Type associated with the Task. If the Task Type has an associated Sub-Type, a "/" will display between the Task Type and Sub-Type.
i. Status – the current Status of the Task.
j. Date Assigned – the latest assigned date of the Task.
k. Program Worker – this field indicates the Worker ID of the worker assigned to the program associated to the Task. If the program does not have an assigned worker or if the Task is not associated to a program, the field will be blank. If the Task is associated to multiple programs with multiple Worker IDs, the Worker IDs will display as a comma-delimited list.
l. **BUTTON:** Complete – this button removes the task from the My Tasks results and changes the status of the Task to "Completed". The button will display if the worker's security profile contains the "TaskDetailEdit" security right.
m. **BUTTON:** Edit – for the particular Task, this button will open the Task Detail page in Edit mode. The button will display if the worker's security profile contains the "TaskDetailEdit" security right.

2.2.4 Page Validation

1. "Get Next – No available Tasks for reassignment."
   a. Add a validation to display when the User clicks Get Next, but is either not associated to any Banks, or the User's associated Banks do not contain any Tasks eligible for reassignment by Get Next.

2.2.5 Page Location

N/A.

2.2.6 Security Updates

1. N/A – There is no need to create new security rights and/or security groups as the following security rights/groups already exist in the LRS/CalSAWS System:

Security Right	Security Group(s)
TaskDetailView	• Task View

TaskDetailEdit	• Task View • Task Edit
GetNextTask	• Get Next
MyTasksView	• Task View • Task Edit • Get Next

2.2.7 Page Mapping

Add page mapping for the My Tasks page.

2.2.8 Page Usage/Data Volume Impacts

N/A.

2.3 My Banks Page

2.3.1 Overview

This section will define the specifics of the "My Banks" page within the Task Pop-Up. This page will display information for Banks that the logged in worker is associated to.

2.3.2 My Banks Mockup

Figure 2.3.2.1 – My Banks Page Mockup

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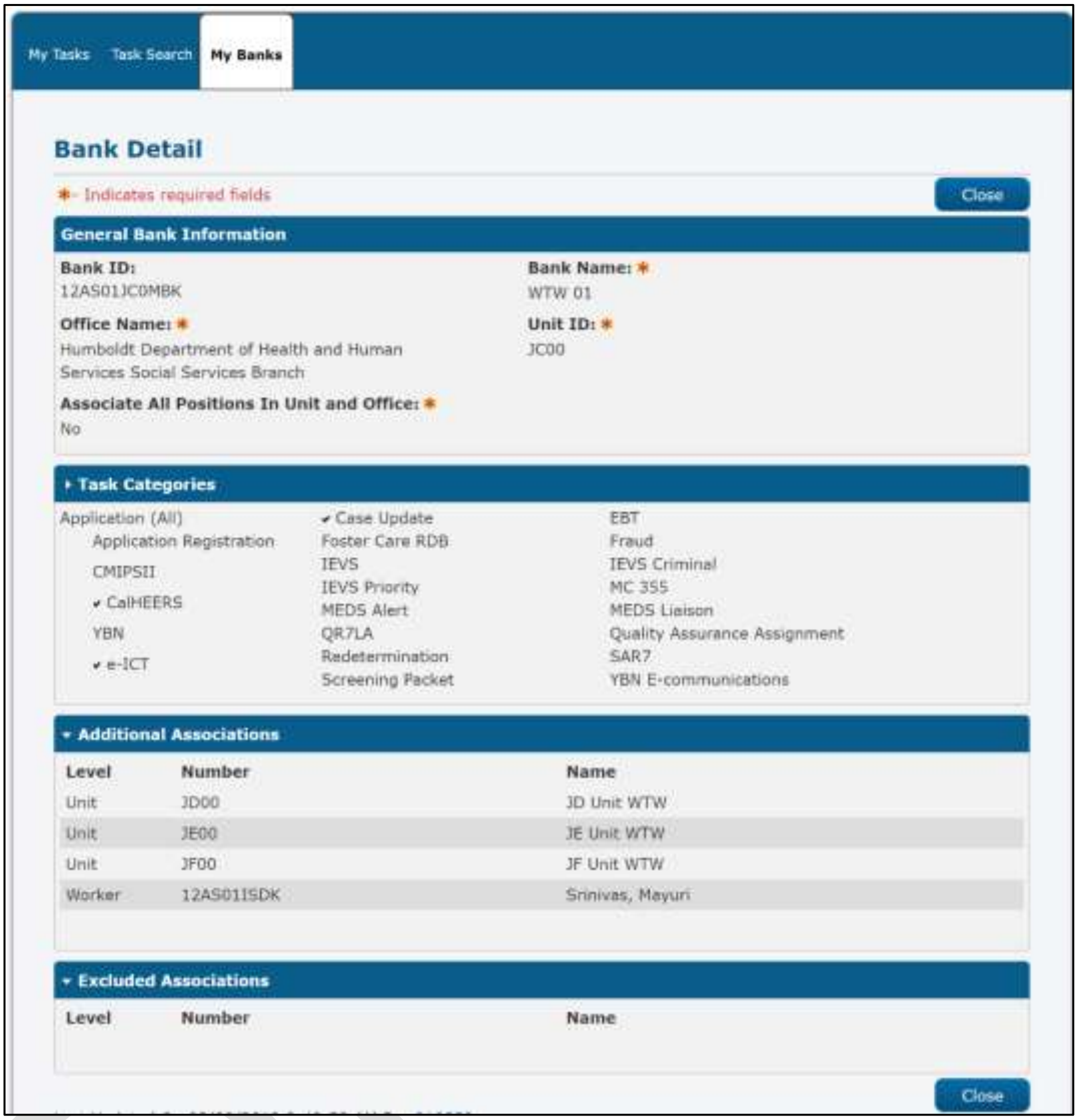

Figure 2.3.2.2 – Bank Detail Page Mockup

2.3.3 Description of Changes

Add a My Banks page to the LRS/CalSAWS System. The My Banks page will display information for Banks that the logged in worker is associated to as a paginated list. The My Banks tab will be accessible if the user's security profile contains the "TaskSearchView" security right.

1. Staff – This field indicates the name of the staff logged in.
2. Worker ID – This field will display the Worker ID being used by the logged in worker. If the logged in worker is associated to multiple Worker IDs, this field will display as a dropdown menu with each associated Worker ID while defaulting to the current Worker ID being used. Selecting a Worker ID from this dropdown followed by the

Search button will refresh the results to display Banks that the selected Worker ID is associated to.

3. Results per Page – A drop down menu with options allowing the user to select a value for the number of results to be displayed on the page. This field will default to 25.
4. **BUTTON:** Search – When clicked, the search results are refreshed to display Banks based on the search criteria.
5. **ICON:** HELP – Clicking this button will open a My Banks Online Help page.
6. <u>Search Results Summary:</u>

   The following columns are displayed in the search results for each Bank that the worker is associated to.

   a. Bank ID – the Bank ID of the Bank. If the worker's security profile contains the "BankDetailView" security right, this value will display as a hyperlink that leads to the Bank Detail page. If the security profile does not contain the "BankDetailView" security right, this value will display as plain text.

      Clicking the hyperlink will display the Bank Detail page within the same window (reference Figure 2.3.2.2). The Edit button will not display on the Bank Detail page if the page is accessed in this way. Clicking the Close button on the Bank Detail page will return to the My Banks search results. Specifics of the Bank Detail page are defined in CA-214928 per DDID 34.

   b. Bank Name – The name of the Bank.
   c. Unit ID – The Unit ID of the Bank.
   d. Office Name – The Office Name of the Bank.

2.3.4 Page Location

N/A.

2.3.5 Security Updates

1. N/A – There is no need to create new security rights and/or security groups as the following security rights/groups for the My Banks page already exist in the LRS/CalSAWS System:

Security Right	Security Group(s)
TaskSearchView	• Task View • Task Edit

2. The “BankDetailView” security right will be introduced with CA-214928 per DDID 34 in the same release.

2.3.6 Page Mapping

Add page mapping for the My Banks page.

2.3.7 Page Usage/Data Volume Impacts

N/A.

2.4 Task Search Page

2.4.1 Overview

The Task Search page allows the User to search and manage Tasks that have been created within the LRS/CalSAWS System.

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2.4.2 Task Search Page Mockup

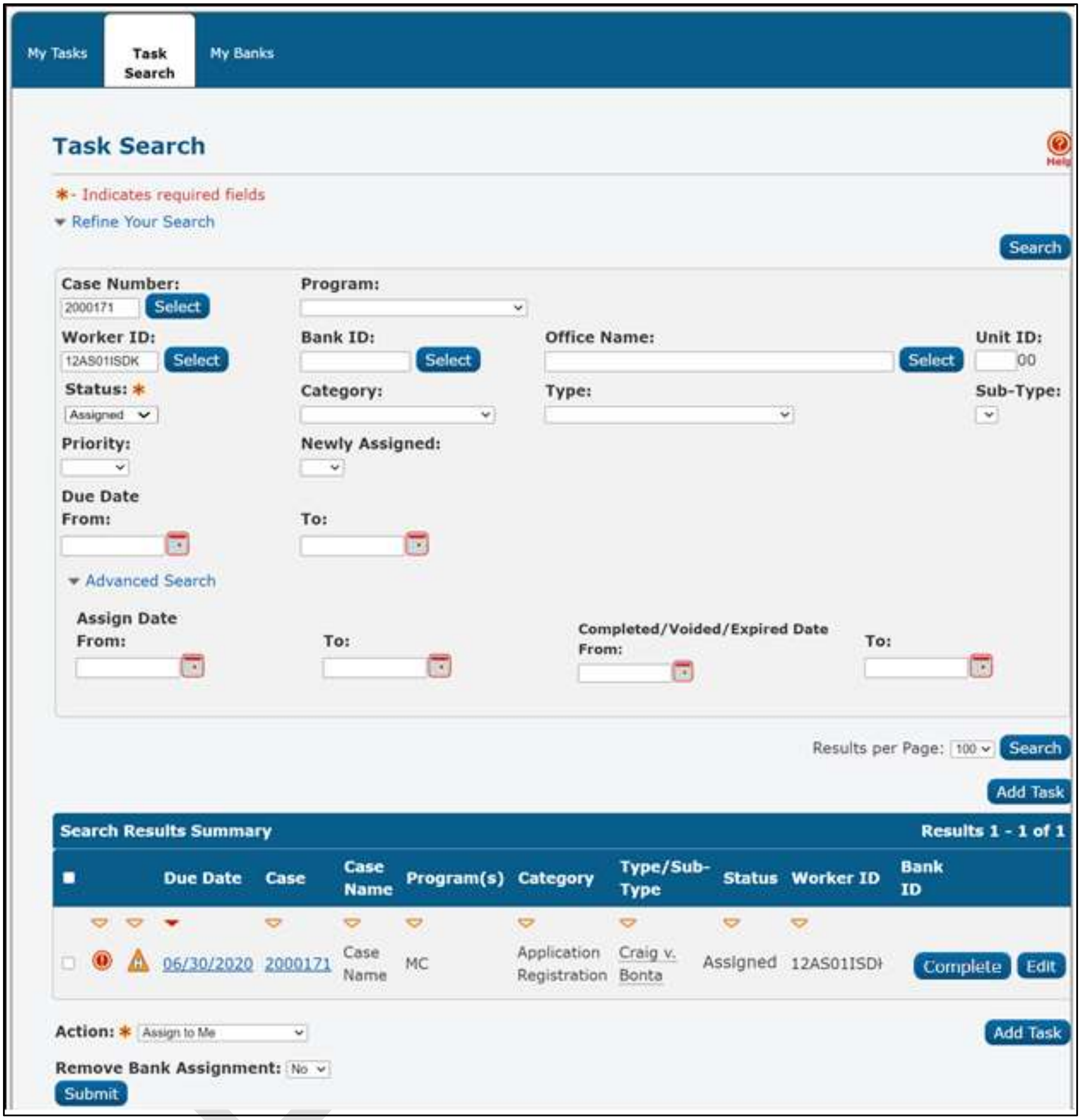

Figure 2.4.2.1 – Task Search Page Mockup

2.4.3 Description of Changes

Add a Task Search page to the LRS/CalSAWS System. The Task Search tab will be accessible if the user's security profile contains the "TaskSearchView" security right.

1. **ICON:** HELP – Clicking this button will open a Task Search Online Help page.

2. Search Parameters
    a. Case Number – a text field to search for Tasks associated to a specific Case Number. A “Select” **BUTTON** displays to the right of this field that will navigate to the Select Person page allowing the user to search for a Case.
    b. Program – a dropdown field containing a list of programs that can be used to search for Tasks associated to a specific program. This field will display programs available within the LRS/CalSAWS System.
    c. Worker ID – A text field to search for Tasks associated to a specific Worker ID. A “Select” **BUTTON** displays to the right of this field that will navigate to the Select Worker page allowing the user to search for a specific Worker ID.
    d. Bank ID – a text field to search for Tasks associated to a specific Bank ID. A “Select” **BUTTON** displays to the right of this field that will navigate to the Select Bank page allowing the user to search for a specific Bank (Reference Section 2.6 for the Select Bank page).
    e. Office Name – a text field to search for Tasks associated to a specific Office. A “Select” **BUTTON** displays to the right of this field that will navigate to the Select Office page allowing the user to search for a specific Office.
    f. Unit ID – a text field to search for Tasks associated to a specific Unit ID.
    g. Status – a dropdown menu containing options to search for Tasks by specific statuses. The options for this dropdown include:
        i. All – This option will consider all Task statuses.
        ii. Assigned/In Process – This option will search for Tasks with a Status of Assigned or In Process.
        iii. Assigned
        iv. Completed
        v. Void
        vi. In Process
        vii. Expired
    h. Category – A dropdown menu containing a list of all available Task Categories. Options included in this dropdown are:
        i. Application Registration
        ii. Batch EDBC
        iii. CMIPSII
        iv. CSC
        v. CWS
        vi. CalHEERS
        vii. Case Update

viii. Computation Request
ix. EBT
x. e-ICT
xi. EDBC
xii. External Recovery Account
xiii. Foster Care RDB
xiv. Fraud
xv. IEVS
xvi. IEVS Criminal
xvii. IEVS Priority
xviii. Interest Allocation
xix. Invoice
xx. Issuance Method
xxi. Issuance Replacement/Reissue
xxii. MC 355
xxiii. MEDS Alert
xxiv. MEDS Liaison
xxv. Manual
xxvi. Payment Request
xxvii. QR7LA
xxviii. Quality Assurance Assignment
xxix. Quality Review
xxx. Redetermination
xxxi. SAR7
xxxii. Screening Packet
xxxiii. Time Limits
xxxiv. Transaction Refund
xxxv. Valuable
xxxvi. YBN
xxxvii. YBN E-communications

i. Type – a dropdown menu containing a list of Task Types. This field populates with the Task Types that are available to the county.

j. Sub-Type – a dropdown menu containing a list of Task Sub-Types that are associated to the selected Task Type in the "Type" dropdown

k. Priority – a dropdown menu containing the following Task Priority options:

i. Critical
ii. High
iii. Medium
iv. Low

l. Newly Assigned – a dropdown allowing the worker to filter the Task results by those that have a Newly Assigned indicator (or not). The options to choose from are:

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        i. Yes
        ii. No
    m. Due Date – date fields allowing the user to filter Task due dates within a date range. The optional fields to fill out for this field are:
        i. From – a date field specifying the beginning of the Task due date filter.
        ii. To – a date field specifying the end of the Task due date filter.
    n. <u>Advanced Search:</u>
        i. Assign Date – date fields allowing the user to filter Task assign dates within a date range.
            1. From – a date field specifying the beginning of the assign date filter.
            2. To – a date field specifying the end of the assign date filter.
        ii. Completed/Voided/Expired Date – date fields allowing the user to filter Tasks by the date they are completed, voided or expire within the date range.
            1. From – a date field specifying the beginning of the date range.
            2. To – a date field specifying the end of the date range.
3. **BUTTON:** Search – When clicked, the search results are refreshed to display tasks that match the search criteria in the search parameters section.
4. **BUTTON:** Add Task – When clicked, this button will navigate to the Task Detail page to add a task. The button will display if the worker's security profile contains the "TaskDetailEdit" security right.
5. <u>Search Results Summary</u>
    a. Selectable checkbox – for each result displayed, a selectable checkbox will display at the beginning of the row. The checkbox will display if the worker's security profile contains the "TaskDetailEdit" security right. (See the "Action" button section below for how the checkbox can be used)
    b. New Assignment Indicator – this column does not have a column header shown on the page. The column will display the New Assignment icon to indicate if the Task is newly assigned to the logged in staff. The user may acknowledge this task and click on the icon, which will remove the icon from display for the Task. If the worker does not click the icon, it will no longer display after the amount of time specified in the Newly Assigned Indicator attribute of the Task Type Detail page. The Indicator will be clickable if the security profile of the logged in user

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contains the “TaskDetailEdit” security right. The column will display the following indicator icon:

i. 

c. Priority Icon – This column does not have a column header shown on the page. The column will display the following graphical icons to indicate the Task Type Priority for each row:

i. 

- Critical

ii. 

- High

iii. 

- Medium

iv. 

- Low

d. Due Date – the Task Due Date. If the security profile of the logged in user contains the “TaskDetailView” security right, the date will display as a hyperlink, otherwise the date will display as plain text. Clicking the hyperlink will display the Task Detail page in View mode.

e. Case – the Case Number associated to the Task. If the Task is not associated to a Case, such as a Clearance Task, this column will be blank. If the security profile of the logged in worker contains the “CaseSummaryView” security right, this field will display as a hyperlink, otherwise it will display as plain text. Clicking the hyperlink will refresh the main LRS/CalSAWS System window to the Case Summary page for the Case.

f. Case Name – The Case Name of the Case associated to the Task. If the Task is not associated to a Case, such as a Clearance Task, this column will be blank.

g. Program(s) – the Program(s) associated with the Task. If the Task is not associated to a Case/Program, such as a Clearance Task, this column will be blank. Tasks that are associated to multiple programs will display a comma-delimited list of the associated program codes.

h. Category – the Category of the Task.

i. Type/Sub-Type – the Type and Sub-Type associated with the Task. If the Task Type has an associated Sub-Type, a “/” will display between the Task Type and Sub-Type.

j. Status – the current Status of the Task.

k. Worker ID – the Worker ID associated to the Task. If a Worker ID is not associated to the Task, this column will be blank.

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l. Bank ID – the Bank ID associated to the Task. If a Bank ID is not associated to the Task, this column will be blank.

m. **BUTTON:** Complete – this button will update the status of the Task to "Completed". The button will display if the worker's security profile contains the "TaskDetailEdit" security right.

n. **BUTTON:** Edit – this button allows the user to edit the selected Task by opening the Task Detail page in Edit mode. The button will display if the worker's security profile contains the "TaskDetailEdit" security right.

6. Action **(Required)**: this dropdown field allows the user to take an action on any Tasks in the results with a checkmark in the selectable checkbox at the beginning of the row. This field will display if the worker's security profile contains the "TaskDetailEdit" security right. Actions available in the dropdown are:

   a. Assign to Me - Assigns the selected Tasks to the logged in worker.

   b. Assign to Program Worker – Assigns the selected Tasks to the worker who is assigned to the Program that is associated to the Task.

   c. Assign to Position – Displays a **(Required)** "Worker ID" field allowing the User to specify a specific Worker ID to assign the selected Tasks to. A Select **BUTTON** displays to the right of the field that will navigate to the Select Worker page allowing the user to search for a specific Worker ID.

   d. Assign to Eligible Positions – An Eligible Position is an Active position with at least 1 or more Task Categories selected on the Position Detail page. This option will assign the selected Tasks to Eligible Positions based on the position's ability to accept the specific Task Category. The receiving worker cannot be the same worker currently assigned to the Task. Tasks are evenly distributed in a round-robin fashion. An optional Office and Unit field will display each with a Select **BUTTON** that will navigate the User to the Select Office and Select Unit page respectively allowing the user to limit Eligible Positions to a specific Office or Unit if they choose.

   e. Assign to Bank– Displays a (Required) "Bank ID" field allowing the user to specify a specific Bank ID to assign the selected Tasks to. A Select BUTTON displays to the right of the field that will navigate to the Select Bank page allowing the user to search for a specific Bank. (Reference Section 2.6)

   f. Unassign Position - Removes the Position assignment for the selected Tasks.

   g. Unassign Bank - Removes the Bank assignment for the selected Tasks.

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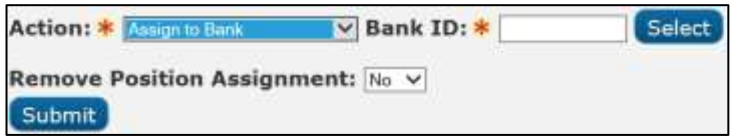
7. Remove Assignment Field – this field allows the user to remove an assignment of the Task.
    a. Remove Position Assignment – This dropdown field displays when “Assign to Bank” is selected in the Action field.



The values are:

        i. No (default) – does not impact any current Position assignments.
        ii. Yes – removes the current Position assignment of the selected Tasks.
    b. Remove Bank Assignment – This dropdown field displays when either “Assign to Me”, “Assign to Program Worker”, “Assign to Position” or “Assign to Eligible Positions” is selected in the Action field. The values are:
        i. No (default) – does not impact any current Bank assignments.
        ii. Yes – removes the current Bank assignment of the selected Tasks.
8. **BUTTON**: Submit – clicking this button submits the Action described by the Action and Remove Assignment fields.

2.4.4 Page Validation

1. “Reassign Task – There is no Worker currently assigned to the program(s). Please specify a Worker.”
    a. Attempting to reassign a Task, or group of Tasks, to the Program Worker when no Worker assignment exists, will result in a validation message. This validation message will also display if the Task is not associated to a Program. Reassignment to logged in Worker or a specified Worker does not trigger validation.
2. “Task Action – Please select a Task to action.”
    a. If the User clicks the Submit button having populated all of the necessary Action, ID, and Remove Assignment field, but without checking any Tasks in Search Results Summary, a validation is triggered. This is an update to the existing Task Assign field validation.
3. “Task Action – All Tasks must be assigned to a Position or a Bank.”
    a. If the User has selected the “Unassign Position” or “Unassign Bank” options in the Action field and clicks Submit, having

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checked at least one Task that is only assigned to the entity they are attempting to unassign, a validation is triggered.

4. "Reassign Task - There are no Eligible Positions available to assign the Tasks to."
   a. Attempting to reassign a Task, or a group of tasks, to any eligible Positions will result in a validation message if there are no Active Positions available to receive the selected Tasks.

2.4.5 Page Location

N/A.

2.4.6 Security Updates

1. N/A – There is no need to create new security rights and/or security groups as the following security rights/groups for the Task Search page already exist in the LRS/CalSAWS System:

Security Right	Security Group(s)
TaskSearchView	• Task View • Task Edit

2.4.7 Page Mapping

Add page mapping for the Task Search page.

2.4.8 Page Usage/Data Volume Impacts

The volume of Task data in the LRS/CalSAWS System is extremely large. Broad search criteria will result in longer search processing. It is highly recommended to be as restrictive as possible with the search criteria on this page to avoid lengthy search processing times.

2.5 Task Detail Page

2.5.1 Overview

The Task Detail page is accessible from the Task Search page. This page can be used to view, edit or create Tasks.

2.5.2 Task Detail Page Mockup

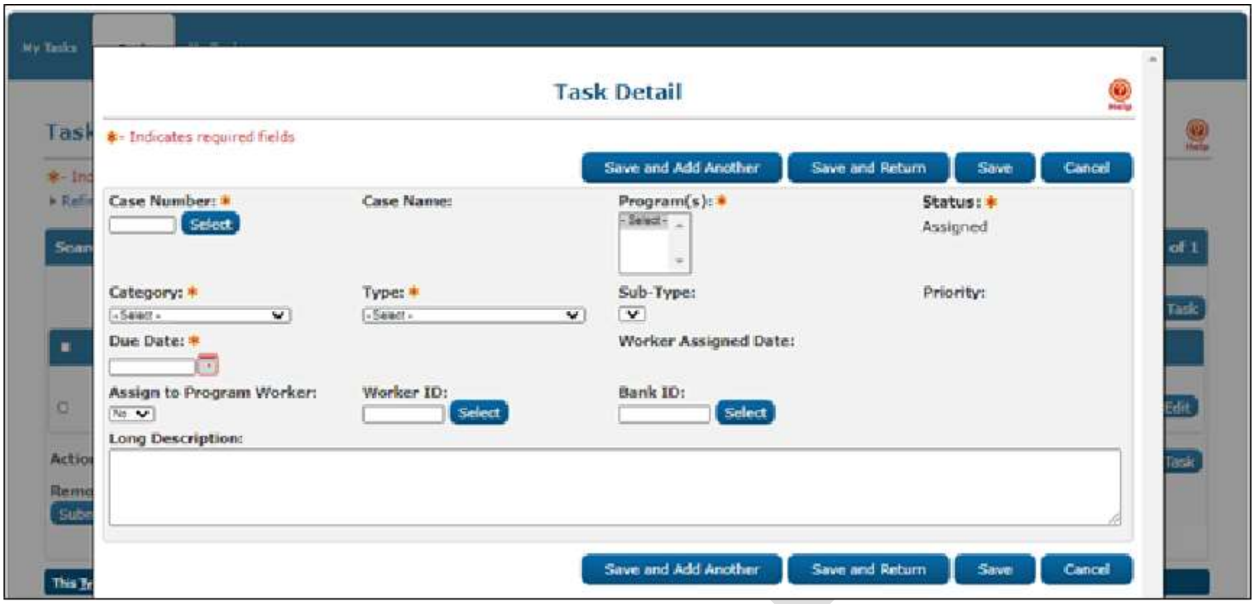

Figure 2.5.2.1 – Task Detail Page Create Mode Mockup

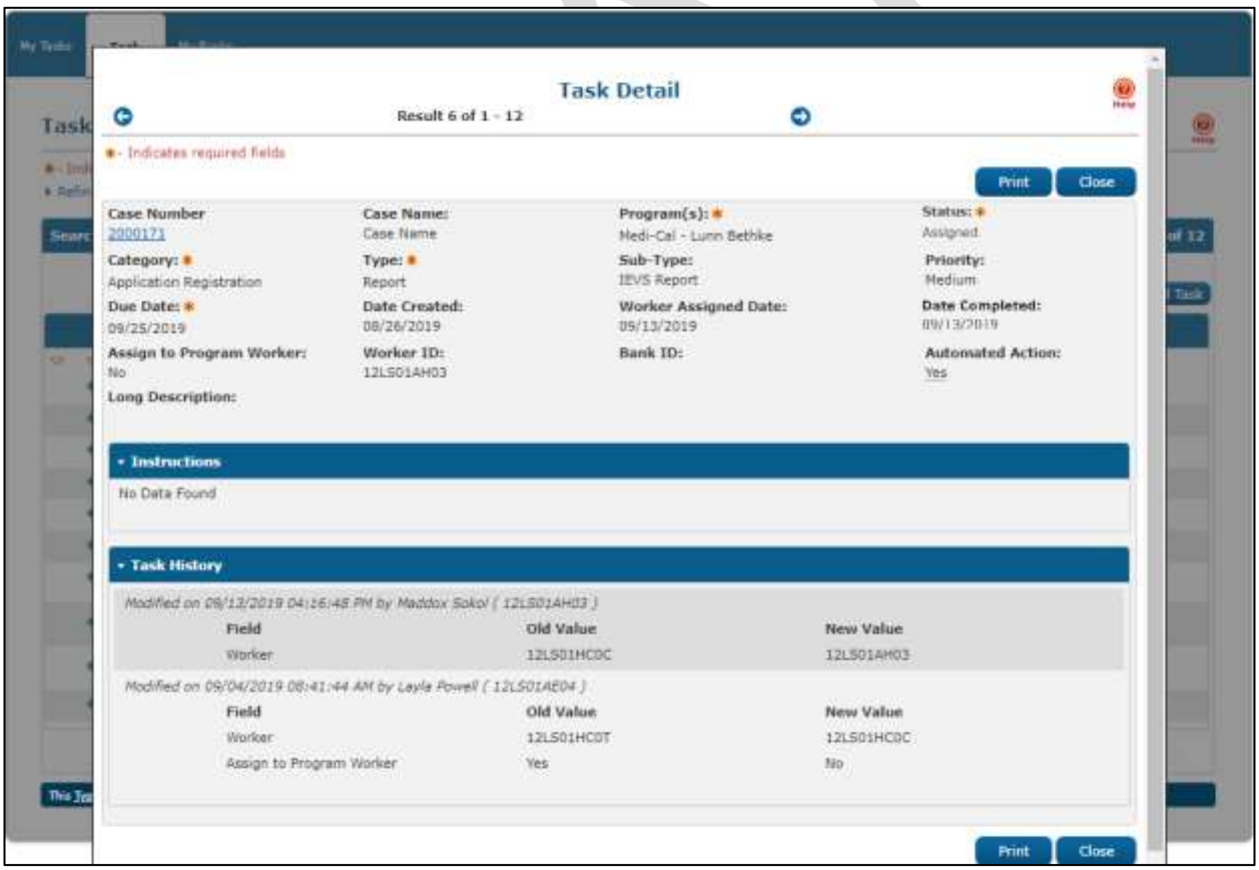

Figure 2.5.2.2 – Task Detail Page View Mode Mockup

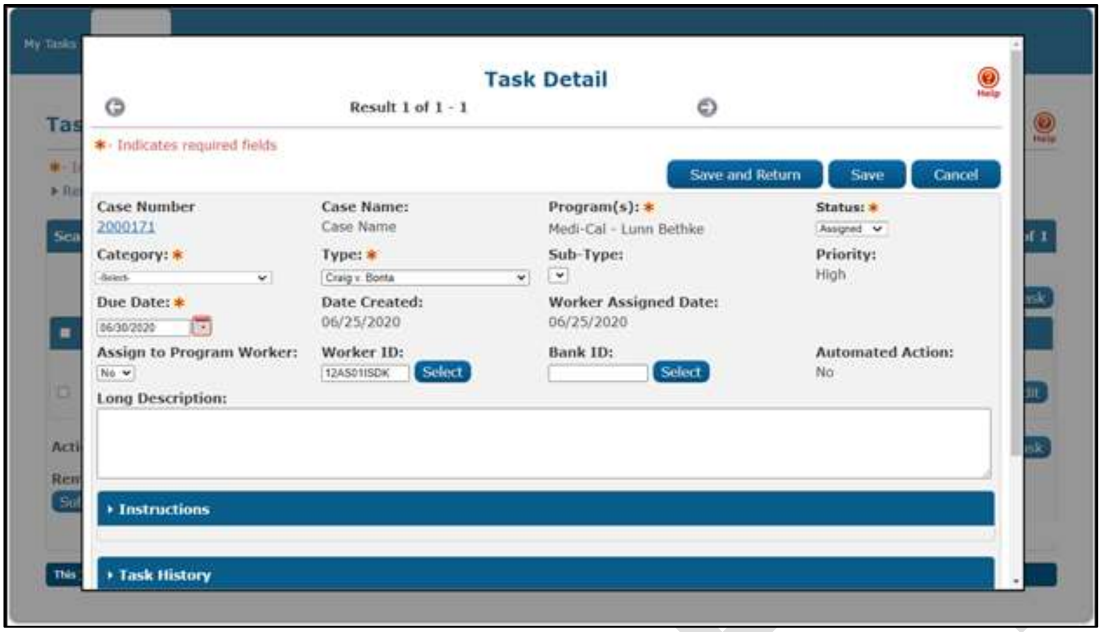

Figure 2.5.2.3 – Task Detail Page Edit Mode Mockup

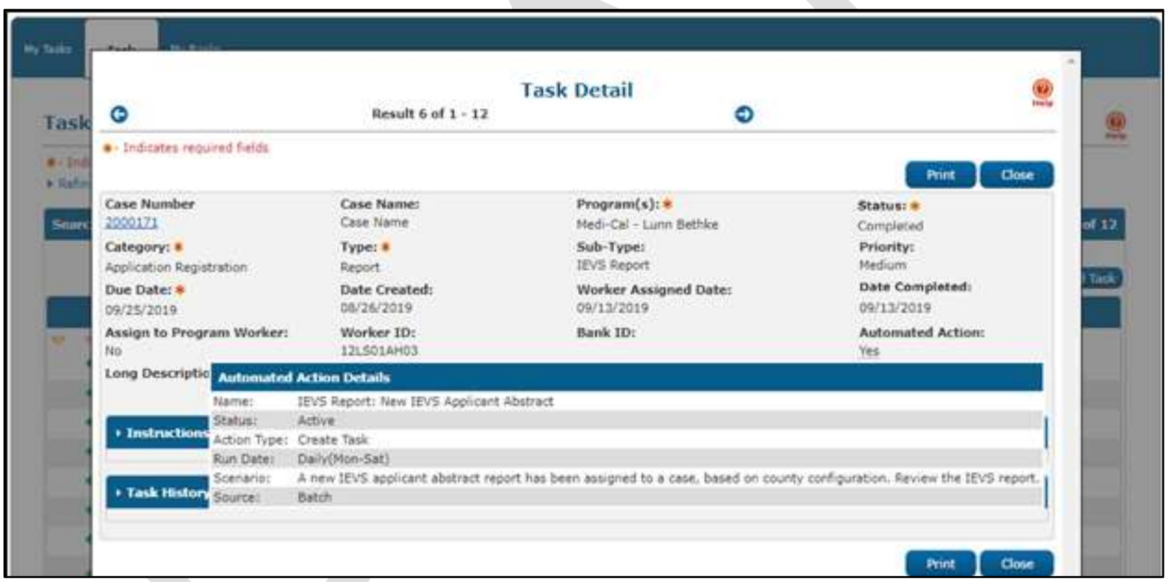

Figure 2.5.2.4 – Task Detail Page View Mode Automated Action Details Mockup

2.5.3 Description of Changes

Add a Task Detail page to the LRS/CalSAWS System as an overlay page within the Tasks Pop-Up window.

1. **ICON:** HELP – Clicking this button will open the Task Detail Online Help page.
2. **BUTTON:** Arrow Left/Right – Figure 2.5.2.2 displays the text "Result 6 of 1 - 12" between the left and right arrows. The result counts are based on

the Task Search page results. The arrow buttons allow the user to quickly navigate to the previous or next Task within the Task Detail overlay instead of having to close the overlay and re-navigate to the Task Detail page for a new Task.

3. **BUTTON:** Save and Add another – this button will display when the page is in Create mode. When clicked, the Task will be saved, and the page will refresh as a blank Task Detail page in Create mode to create another Task.
4. **BUTTON:** Save and Return – this button will display when the page is in Create or Edit mode. When clicked, the Task will be saved, and the user will return to the Task Search page.
5. **BUTTON:** Save – this button will display when the page is in Create or Edit mode. When clicked, the Task Detail page will be saved and displayed in View mode.
6. **BUTTON:** Cancel – this button will display when the page is in Create or Edit mode. When clicked, modifications to the Task Detail page will be discarded and the page will return to the Task Search page.
7. **BUTTON:** Edit – this button will display when the page is in View mode. When clicked, the Task Detail page will display in Edit mode. The button will display if the worker's security profile contains the "TaskDetailEdit" security right.
8. **BUTTON:** Print – this button opens the native print box allowing the user to print the Task Detail page.
9. **BUTTON:** Close – this button will display when the page is in View mode. When clicked, the Task Detail page will close and return to the Task Search page.
10. Case Number **(Required)** – the Case Number associated to the Task. When the page is in Create mode, a "Select" **BUTTON** will display to the right of this field that will open the Select Person page allowing users to search for a specific Case Number.

    When the page is in Edit or View mode, this field will display the Case Number associated to the Task as a hyperlink. When the hyperlink is clicked, the main LRS/CalSAWS window will navigate to the Case Summary page for the Case.
11. Case Name – this field displays the Case Name of the Case based on the Case Number field. This field is not editable.
12. Program(s) **(Required)** – a multi-select box allowing the user to select one or more of the Programs, based on the selected Case Number, to be associated to the Task. When the page is in View mode, this field will display the Programs that are associated to the Task. When the page is in Edit mode, this field will not be editable. If the Task was initially created without a Case/Program association, such as a Clearance Task, page validation will not force this field as required in Edit mode as the field is not editable. This function is consistent with the

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processing of Clearance Tasks through the Worklist pages in the LRS/CalSAWS System.

13. Status **(Required)** – This field indicates the status of the Task. It is only editable when the page is in Edit mode. When the page is in Create mode, this field will default to “Assigned”. The options for this field are:
    a. Expired: This value is not included in the dropdown list when the page is in Edit mode as the Expired status is set via the Task Expiration automated batch process.
    b. Void
    c. In Process
    d. Assigned
    e. Completed
14. Category **(Required)** –A dropdown box which will filter the Type dropdown to Task Types associated to the selected Category. If all Task Types associated to a Category have the “Available Online” attribute set to “No”, the Category value will not display in the dropdown list. Options included in this dropdown are:
    a. Application Registration
    b. Batch EDBC
    c. CMIPSII
    d. CSC
    e. CWS
    f. CalHEERS
    g. Case Update
    h. Computation Request
    i. EBT
    j. e-ICT
    k. EDBC
    l. External Recovery Account
    m. Foster Care RDB
    n. Fraud
    o. IEVS
    p. IEVS Criminal
    q. IEVS Priority
    r. Interest Allocation
    s. Invoice
    t. Issuance Method
    u. Issuance Replacement/Reissue
    v. MC 355

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w. MEDS Alert
x. MEDS Liaison
y. Manual
z. Payment Request
aa. QR7LA
bb. Quality Assurance Assignment
cc. Quality Review
dd. Redetermination
ee. SAR7
ff. Screening Packet
gg. Time Limits
hh. Transaction Refund
ii. Valuable
jj. YBN
kk. YBN E-communications

15. Type **(Required)** – the Task Type of the Task. When the page is in Create or Edit mode, this field will display as a drop-down box that includes Task Types associated to the county with a "Yes" in the "Available Online" field of the Task Type Detail page. If a value is selected in the Category field, Task Type options will be filtered to only display the Task Types associated to the selected Category.
16. Sub-Type – the Task Sub-Type of the Task. When the page is in Create or Edit mode, this field will display as a drop-down box that includes Task Sub-Types associated to the Task Type with a "Yes" in the "Available Online" field of the Task Sub-Type Detail page. If a value is selected in the Type field, Sub-Type options will be filtered to only display the Sub-Types associated to the selected Task Type.
17. Priority – This field is not editable and automatically populates based on the priority of the Task Type.
18. Due Date **(Required)** – This field allows the User to indicate when the Task is due. This date must be a date that is on or after the current date.
19. Date Created – This field will display the date that the Task was created. This field will not display when the page is in Create mode as the Task has not yet been saved.
20. Worker Assigned Date – This field is not editable and will initially populate to be the date the Task is created. Ongoing, this date will display the latest assigned date for the Task.
21. Date Completed/Voided/Expired – Completed, Voided and Expired are all end states of a Task. If the Task has reached one of these end states, this field will display the date in which the end state

(Completed, Voided or Expired) was reached. The field label will also display the appropriate value for the date. For example, if the Task was completed, the field label will display “Date Completed”, if the Task was voided, the label will display “Date Voided”.

22. Assign to Program Worker – indicates if the Task has been assigned to the worker of the Program associated to the Task. When the page is in Create or Edit mode, options include:
    a. Yes – will assign the Task to the worker who is currently assigned to the Program associated to the Task. The Worker ID field will pre-populate with the appropriate Worker ID in this instance.
    b. No (default) – allows the user to specify a Worker ID in the Worker ID field to assign the Task to. This allows the User to assign the Task to another Worker using the Select Button, which will open the Select Worker page.
23. Worker ID – This field will display the Worker ID the Task is assigned to. When the page is in Create or Edit mode and the value of the “Assign to Program Worker” field is “No”, this field will be an editable text box allowing the user to enter a specific Worker ID. A “Select” **BUTTON** will display to the right of this field that will navigate to the Select Worker page allowing the user to search for a specific Worker ID.
24. Bank ID – if the Task is assigned to a Bank, this field will display the Bank ID of the Bank. When the page is in Create or Edit mode, this field will be an editable text box allowing the user to enter a specific Bank ID. A “Select” **BUTTON** will display to the right of this field that will navigate to the Select Bank page allowing the user to search for a specific Bank ID. (Reference Section 2.6)
25. Automated Action – This field will indicate whether the task was created by an Automated Action. If the task was created by an Automated Action, “Yes” will display as a tooltip that on mouse hover over will display the details of the Automated Action. (Reference Figure 2.5.2.4). This field does not display when the page is in Create mode. The following are the Automated Action attributes that display:
    a. Name
    b. Status
    c. Action Type
    d. Run Date
    e. Scenario
    f. Source
26. Long Description – A free text field allowing the user to add any additional details pertaining to the Task. This field will be limited to 2,000 characters.

27. Instructions – This field indicates the instructions that existed for the Task Type at the time the Task was created. Instructions are defined in the Instructions field of the Task Type Detail page.
28. Task History – This section will display the history of modifications made to the Task. For each modification entry in the Task History section, a header sentence will display formatted as "Modified on <Date Time> by <Staff Name> (<Worker ID>)". Reference Figure 2.5.2.2 for an example. Modification information will be described with the following 3 fields:
    a. Field – the name of the field that has been modified.
    b. Old Value – the original value of the field before the modification was made.
    c. New Value – the resulting value of the field after the modification.

2.5.4 Page Validation

1. "Program(s) – There is no Worker currently assigned to the program(s). Please specify a Worker."
    a. Attempting to create a Task for a program with no Worker assignment will result in a validation message when the "Assign to Program Worker" checkbox is checked.
2. "Program(s) – There is no Worker currently assigned to the program(s). Please specify a Worker."
    a. Attempting to edit a Task for a program with no Worker assignment will result in a validation message when the "Assign to Program Worker" checkbox is updated from unchecked to checked.
3. "Task Assignment - Please select a Worker ID, Bank ID, or Assign to Program Worker."
    a. Add a validation to display when the User attempts to save a Task without having selected either a Worker ID, Bank ID, or the value "Yes" in the Assign to Program Worker field. At least one must be selected in order to save the Task. This is an update to the existing Worker ID custom validation.
4. "Bank ID – Bank ID does not exist."
    a. Add a validation to display when the User attempts to save a Task with the Bank ID field either blank or populated with an ID that does not correspond to an existing Bank in the C-IV System.

2.5.5 Page Location

N/A.

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2.5.6 Security Updates

1. N/A – There is no need to create new security rights and/or security groups as the following security rights/groups already exist in the LRS/CalSAWS System:

Security Right	Security Group(s)
TaskDetailView	• Task View
TaskDetailEdit	• Task View • Task Edit

2.5.7 Page Mapping

Add page mapping for the Task Detail page.

2.5.8 Page Usage/Data Volume Impacts

N/A.

2.6 Select Bank Page

2.6.1 Overview

This Select Bank Page allows the user to search for and select a specific Bank.

2.6.2 Select Bank Page Mockup

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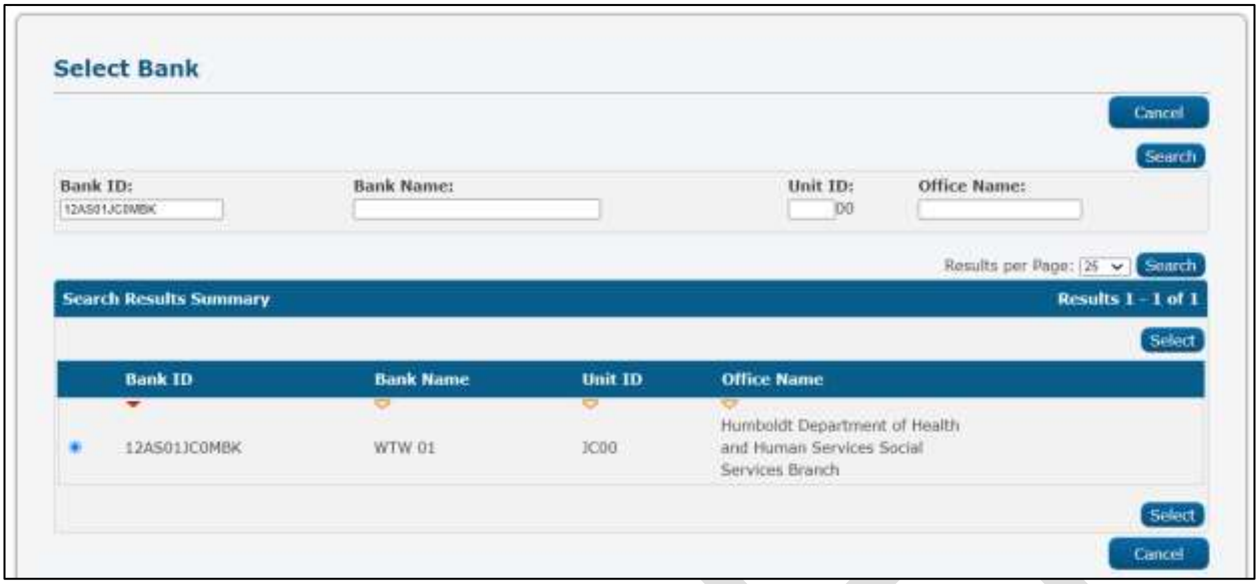

Figure 2.6.2.1 – Select Bank Page Mockup

2.6.3 Description of Changes

Add a Select Bank page to the LRS/CalSAWS System.

1. **BUTTON:** Cancel – this button will return the user to the previous page that the user had navigated from.
2. **BUTTON:** Search – this button refreshes the Search Results Summary to display Banks that match the search criteria in the Search Parameters section.
3. <u>Search Parameters</u>
   a. Bank ID – a text field allowing the user to search for a specific Bank ID.
   b. Bank Name – a text field allowing the user to search for a specific Bank Name.
   c. Unit ID – a text field allowing the user to search for Banks within a specific Unit.
   d. Office Name – a text field allowing the user to search for Banks within a specific Office.
4. <u>Search Results Summary</u>
   a. **BUTTON:** Select -- Clicking this button displays the previous page the User had navigated from and will load the Bank ID of the selected Bank into the appropriate field of the original page. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.
   b. Selectable Radio Button – This field allows the user to select a single Bank from the Search Results Summary section.

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c. Bank ID – the Bank ID of the Bank.
d. Bank Name – the name of the Bank.
e. Unit ID – the Unit ID associated to the Bank.
f. Office Name – the Office Name of the Office associated to the Bank.

2.6.4 Page Location

N/A.

2.6.5 Security Updates

1. N/A – No new security rights for this page as this is a page that is only accessible within parent pages that the user already has the security to access.

2.6.6 Page Mapping

Add page mapping for the Select Bank page.

2.6.7 Page Usage/Data Volume Impacts

N/A.

2.7 Automated Regression Test

2.7.1 Overview

Create new automated regression test scripts to verify a subset of the Task functionality outlined above.

2.7.2 Description of Change

1. Create new regression test scripts to verify the following Task functionality:
    a. Create and search:
        i. Create with and without sub-type
        ii. Search via:
            1. Task Search
            2. My Tasks
        iii. Search by:
            1. Case Number
            2. Worker ID

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            3. Bank ID
            4. Worker ID and each of:
                a. Newly Assigned
                b. Category
                c. Type
                d. Sub-Type
    b. New assignment indicator:
        i. Verify display
        ii. Clear indicator
    c. Reassignment options:
        i. Assign to Bank (Select Bank by Bank ID), with each of:
            1. "Remove Position Assignment" not selected
            2. "Remove Position Assignment" selected
        ii. Assign to Me, with:
            1. "Remove Bank Assignment" not selected
        iii. Assign to Program Worker:
            1. "Remove Bank Assignment" not selected
        iv. Assign to Position (logged-in worker), with:
            1. "Remove Bank Assignment" selected
        v. Validations:
            1. "Task Action" on "Unassign Position" with no Bank assigned
            2. "Task Action" on "Unassign Bank" with no Position assigned
2. Create new regression test scripts to verify the following My Banks functionality:
    a. Automatic inclusion, with no "Additional" or "Excluded" association
    b. Specific inclusion through "Additional Associations"
    c. Specific exclusion through "Excluded Associations"

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3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

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4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
655	The CONTRACTOR shall migrate the Task icon link on the Utilities Navigation Bar to provide access to the My Task and Task Search pages.	None	This design incorporates the "Tasks" icon into the Utilities Navigation Bar which allows access to the My Task and Task Search pages.

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5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

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6 OUTREACH

N/A

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7 APPENDIX

N/A

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