CalSAWS | Enhancement Request (CER)

DRAFT

PPOCs: Please send the completed request to CER@CalSAWS.org and cc your RM.

Submission Date	1/14/2021
Title	OCAT Appraisal Workload Report Enhancement

Region #: 2	**County: Sacramento**	
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Program(s) Impacted:

☐ Adoptive Services	☐ ARC	☐ CalFresh	☐ Cal-Learn
☐ CalWORKS / RCA	☐ CAPI	☐ Child Care	☐ CMSP
☐ Foster Care	☐ GA/GR	☒ GAIN/REP/WTW	☐ GROW
☐ Kin-GAP	☐ Medi-Cal / RMA	☐	☐
☐ Other – specify			

Area(s) Impacted:

☐ Call Center	☐ Case Assignment	☐ Client Correspondence	☐ Eligibility
☐ Fiscal / Collections	☐ Hearings	☐ Imaging	☐ Lobby Management
☐ Reports	☐ Resource Data Bank	☐ Schedule Appt	☐ Security
☐ Self Service Portal	☐ Special Investigation	☐ Task Mgmt	☐ Time Limits
☐ Training			

☐ Interface(s) - specify

☒ Other – specify

OCAT System Enhancement
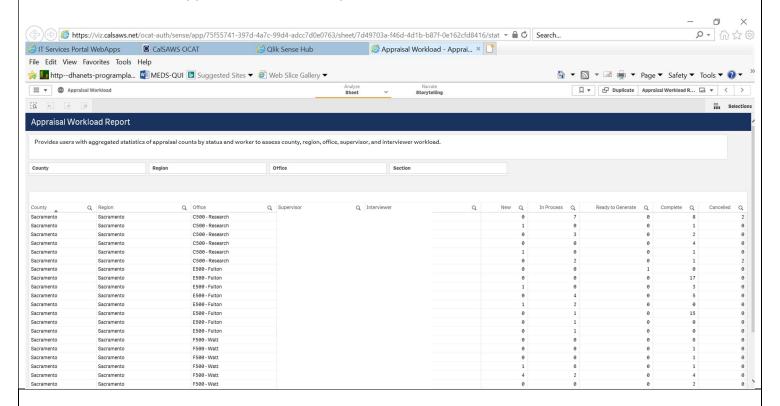
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Justification / Request Summary:

Issue:

During the OCAT UAT and in using the OCAT Appraisal Workload Qlik Report in the OCAT system, the data is only aggregate level data and does not provide county staff and supervisors the individual level data for current Appraisal Workload Report.

Appraisal Workload Report

Provides users with aggregated statistics of appraisal counts by status and worker to assess county, region, office, supervisor, and interviewer workload.

County	Region	Office	Supervisor	Interviewer	New	In Process	Ready to Generate	Complete	Cancelled
Sacramento	Sacramento	C500 - Research			0	7	0	8	2
Sacramento	Sacramento	C500 - Research			1	0	0	1	0
Sacramento	Sacramento	C500 - Research			0	3	0	2	0
Sacramento	Sacramento	C500 - Research			0	0	0	4	0
Sacramento	Sacramento	C500 - Research			1	0	0	1	0
Sacramento	Sacramento	C500 - Research			0	2	0	1	2
Sacramento	Sacramento	E500 - Fulton			0	0	1	0	0
Sacramento	Sacramento	E500 - Fulton			0	0	0	17	0
Sacramento	Sacramento	E500 - Fulton			1	0	0	3	0
Sacramento	Sacramento	E500 - Fulton			0	4	0	5	0
Sacramento	Sacramento	E500 - Fulton			1	2	0	0	0
Sacramento	Sacramento	E500 - Fulton			0	1	0	15	0
Sacramento	Sacramento	E500 - Fulton			0	1	0	0	0
Sacramento	Sacramento	F500 - Watt			0	0	0	6	0
Sacramento	Sacramento	F500 - Watt			0	0	0	1	0
Sacramento	Sacramento	F500 - Watt			0	0	0	1	0
Sacramento	Sacramento	F500 - Watt			1	6	0	1	0
Sacramento	Sacramento	F500 - Watt			4	2	0	4	0
Sacramento	Sacramento	F500 - Watt			0	0	0	2	0

Proposed Recommendation:

Enhance the OCAT Appraisal Workload Report in Qlik to add a detail report that would provide individual level data for current Appraisal Workload to assist with providing the current status of OCAT Appraisals assigned/unassigned to workers since it contains all statuses in one report. This is creating a workload impact for our supervisors and staff when trying to manage the workload and tasks of their staff.

Priority/Implementation Consideration(s):

High

- Region 6 suggestions: the following suggestions:
    o add the option to search data by Region not just by County. Also add the option to select specific dates for the Workload report when searching by Region.
  All Administrative Reports should be able to search by:
    ▪ Region within the County
    ▪ Selected Date

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■ User Name not just email ID
All Demographic, Barrier reports should be able to search by:

<li style="color:red">Region within the County
<li style="color:red">Selected Date
<li style="color:red">User name not just email ID

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<tr><td colspan="2">CalSAWS Response:</td></tr>
<tr><td>CER Tracking #: (automatically generate by JIRA)
CA-223946</td><td>SCR # CA-224954</td></tr>
<tr><td colspan="2"></td></tr>
<tr><td>Rejected By:</td><td>Date:</td></tr>
<tr><td colspan="2">Rejection Reason(s) or other Comments:</td></tr>
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