

DRAFT

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226000

DDID 34 – Task Management

Legacy Task Category

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

This design describes modifications to the CalSAWS System to introduce a new Task Category to support Legacy Task Types.

1.1 Current Design

The C-IV and CalSAWS Systems both support customizable Task Types via the Task Type Detail page. SCR CA-214928 introduced customizable Task Types to the CalSAWS System per DDID 34 in November of 2020.

Task Types within the CalSAWS System are required to be associated to a Task Category. The Task Type Detail page in the C-IV System does not include a Task Category attribute.

1.2 Requests

Introduce a new Task Category that will be associated to converted Task Types. This attribute is necessary to support Task assignment and distribution functionality in the CalSAWS System.

1.3 Overview of Recommendations

1. Add a Legacy Task Category to the CalSAWS System to support converted Task Types.

1.4 Assumptions

1. C-IV System converted Task Types will all be associated to the "Legacy" Task Category.
2. C-IV System converted Positions will by default have the "Legacy" Task Category selected in the Tasks panel of the Position Detail page.
3. Task functionalities that are reliant on evaluations of the Task Category attribute do not require logic modifications to function appropriately with the addition of a new Legacy Task Category.

2 RECOMMENDATIONS

2.1 Legacy Task Category

2.1.1 Overview

Each Task Type within the CalSAWS System is required to be associated to a Task Category. There is no such attribute in the C-IV System. A new Task Category is required to support converted Task Types. This section outlines the recommendations to introduce a new Task Category to support converted Task Types and Positions.

2.1.2 Description of Changes

1. Add a "Legacy" Task Category to the CalSAWS System. This Task Category will be available for use for all CalSAWS Counties.

Technical: The code value for this Task Category must be "LC".

- a. The "Legacy" Task Category will appear in Task Category dropdown menus on the following online pages per current requirements and ordering of each field:
 - i. Pop Up - Task Search
 - ii. Pop Up – Task Detail
 - iii. Task Type List
 - iv. Task Type Detail
 - v. Task Reassignment Detail
 - vi. Worklist
 - vii. Worklist – Task Detail
 - viii. Worklist PR RE

For additional details of the above pages, reference design documentation in the following enhancements:

- CA-214928: DDID 34
- CA-221629: DDID 34 Continued
- CA-214929: DDID 655

- b. The "Legacy" Task Type Category value will function as follows on the Task Type Detail page:

Page Mode	"Legacy" Task Category Behavior
View	The Category attribute of the Task Type will display; "Legacy" if the Category of the Task Type is "Legacy".

Page Mode	"Legacy" Task Category Behavior
Edit	<p>If the Task Type Category value is not "Legacy" when Edit mode is initiated, "Legacy" will not be a selectable option in the Category dropdown menu.</p> <p>If the Task Type Category value is "Legacy" when Edit mode is initiated, "Legacy" will remain a selectable option in the Category dropdown menu until the "Save and Return" button is clicked. If the Category value is changed to a value other than "Legacy" and the page is saved, via the Save and Return button, subsequent edits to the Task Type will not include "Legacy" in the Category dropdown menu.</p>
Create	<p>The Category drop down menu will not include the "Legacy" value. Newly created Task Types cannot be associated to a "Legacy" Task Category.</p>

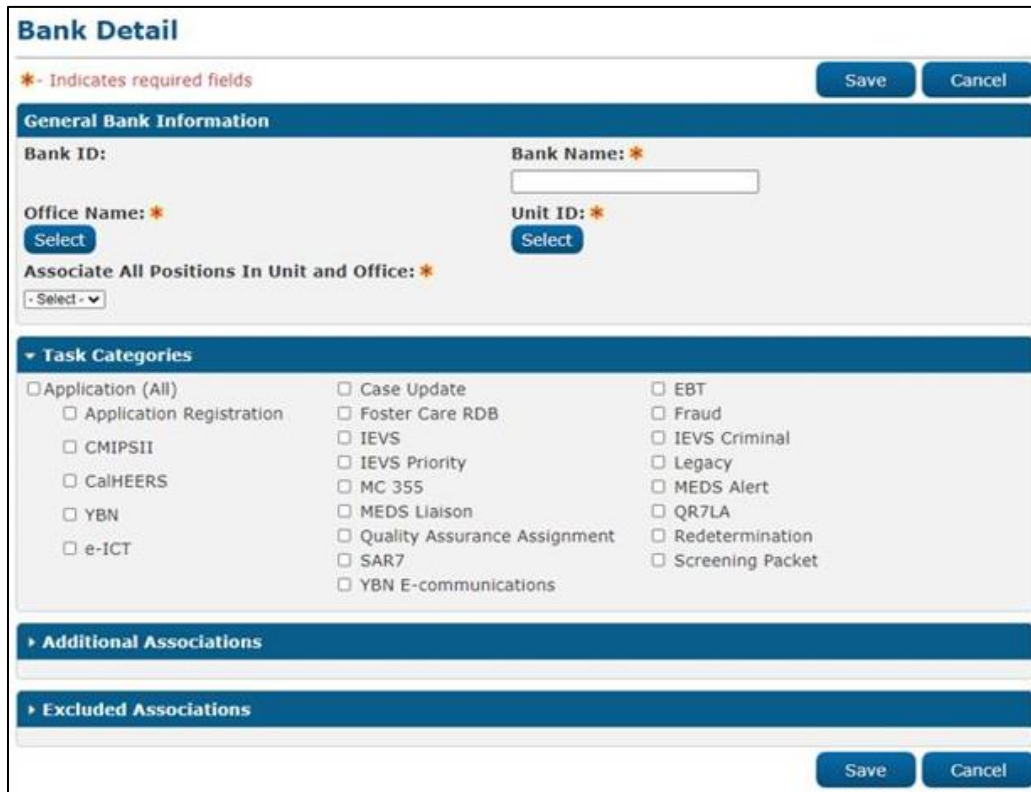
Note: Additional online pages other than the Task Type Detail page that display the Task Category attribute do NOT require logic modifications to display the new "Legacy" Task Category value.

2.2 Bank Detail Page

2.2.1 Overview

The Bank Detail page allows users to view, create and manage Banks within the CalSAWS System. The Bank Detail page contains a "Task Categories" section allowing a Bank to be configured to receive one or more Task Categories via the Office Distribution processing.

2.2.2 Bank Detail Page Mockup



The mockup shows a 'Bank Detail' form with the following sections:

- General Bank Information:** Includes fields for Bank ID, Bank Name, Office Name, and Unit ID, each with a 'Select' button. A dropdown menu for 'Associate All Positions In Unit and Office' is also present.
- Task Categories:** A list of checkboxes for various categories, including Application (All), CMIPSI, CalHEERS, YBN, e-ICT, Case Update, Foster Care RDB, IEVS, IEVS Priority, MC 355, MEDS Liaison, Quality Assurance Assignment, SAR7, YBN E-communications, EBT, Fraud, IEVS Criminal, Legacy, MEDS Alert, QR7LA, Redetermination, and Screening Packet.
- Additional Associations:** A section for listing additional associations.
- Excluded Associations:** A section for listing excluded associations.

Buttons for 'Save' and 'Cancel' are located at the top right and bottom right of the form.

Figure 2.2.2.1 – Bank Detail Page Mockup

2.2.3 Description of Changes

1. Add the “Legacy” Task Category as a selectable option in the Task Categories Panel of the Bank Detail page. Underlying logic of the page will not be modified.

2.2.4 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Bank

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Position Detail Page

2.3.1 Overview

The Position Detail page allows configuration of various attributes related to a Position. The Tasks panel allows a Position to be configured for receipt of one or more Categories of Tasks.

2.3.2 Position Detail – Tasks Panel Mockup

Tasks		
<input type="checkbox"/> Application (All)	<input type="checkbox"/> Case Update	<input type="checkbox"/> EBT
<input type="checkbox"/> Application Registration	<input type="checkbox"/> Foster Care RDB	<input type="checkbox"/> Fraud
<input type="checkbox"/> CMIPSI	<input type="checkbox"/> IEVS	<input type="checkbox"/> IEVS Criminal
<input type="checkbox"/> CalHEERS	<input type="checkbox"/> IEVS Priority	<input type="checkbox"/> Legacy
<input type="checkbox"/> YBN	<input type="checkbox"/> MC 355	<input type="checkbox"/> MEDS Alert
<input type="checkbox"/> e-ICT	<input type="checkbox"/> MEDS Liaison	<input type="checkbox"/> QR7LA
	<input type="checkbox"/> Quality Assurance Assignment	<input type="checkbox"/> Redetermination
	<input type="checkbox"/> SAR7	<input type="checkbox"/> Screening Packet
	<input type="checkbox"/> YBN E-communications	

Figure 2.3.2.1 – Position Detail – Tasks Panel Mockup

2.3.3 Description of Changes

1. Add the "Legacy" Task Category as a selectable option in the Task Categories Panel of the Position Detail page. Underlying logic of the page will not be modified.

2.3.4 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Position

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
34	<p>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:</p> <ol style="list-style-type: none"> 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 	<ul style="list-style-type: none"> - 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. 	<p>This design introduces a recommendation that will support converted Task Types so as to not impact task functionality currently available to C-IV System users.</p>

	Management Dashboard (OBIEE) to account for the system modifications being made as part of migration		
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5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A