

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214915

Task Mgt - Task Successors and Action Steps

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to add functionality for Task successors and action steps.

1.1 Current Design

The CalSAWS System contains a series of Task pages allowing county staff to view, manage and work tasks.

1.2 Requests

Update Task Management functionality within the CalSAWS System to allow configuration of Task Action Steps and resulting Task Type dependencies.

1.3 Overview of Recommendations

1. Update the Task Type Detail and Task Sub-Type Detail pages to allow configuration of Action Steps.
2. Update the Task Type Detail and Task Sub-Type Detail pages to allow configuration of Resulting Task information to be evaluated at Task completion.
3. Add a new page to display Task Type/Sub-Type Dependencies.
4. Update Task Detail pages to consider and display Action Step information for a Task when available.
5. Update the Position Detail page to allow a Position to be configured to require a User to complete Task Action Steps when indicated.

1.4 Assumptions

1. Staff that are currently configured with the appropriate security to complete Tasks will not be adversely affected by this enhancement. A Staff who can complete Tasks will not be required to complete Task Action Steps automatically with this enhancement.
2. Existing Task Types/Task Sub-Types will not be pre-configured with Action Steps and/or Dependencies. County Administrators will configure these settings as necessary.
3. Current Staff whose security profile includes edit capabilities for Task Types will by default be able to configure information in the new panels being added to the Task Type Detail and Task Sub-Type Detail pages per sections 2.1 and 2.2.
4. If a Task Type or Task Sub-Type is configured to have Action Steps, the setting will only reflect for newly created Tasks. There will be no retroactive adjustments to pre-existing Tasks.
5. The pop-up Task Detail page displayed through Guided Navigation initiated through the Worklist, Worklist PR RE and Pending Authorizations pages is the same as the Task Detail page accessed directly from the Worklist page.

6. Automated Task closure logic within the CalSAWS System will not enforce the completion of Task Action Steps.

2 RECOMMENDATIONS

This section will outline recommendations to introduce Task Management functionality that allows authorized users to specify which types of Tasks can be created in a flow to existing Tasks.

2.1 Task Type Detail Page

2.1.1 Overview

The Task Type Detail page is accessible from the Task Type List page. This page will be used to capture and display detailed information about the Task Type.

2.1.2 Task Type Detail Mockup

Task Type Detail

*- Indicates required fields

Save and Return
Cancel

Task Type Information

Name: *

Category: *

- Select -

Priority:

Medium ▾

Available Online:

Available for Automation:

Instructions:

Expire Tasks: *

- Select -

Newly Assigned Indicator: *

Tasks display indicator for day(s)

Sub-Type Information

Name	Available Online	Available for Automation	Priority	Task Expiration
Add				

Append Information

Action Step Information

Order	Action Step
<input type="checkbox"/> 1 ▾	Verify the person's primary language is accurate.
<input type="checkbox"/> 2 ▾	

Remove
Add

Resulting Task Information

Dependencies

Task Type:

▾

Task Sub-Type:

▾

Due Date:

- Select -

Number of Calendar Days:

Distribution Type:

- Select -

Program Worker:

▾

Bank:

▾

Bank ID:

 Select

Long Description:

Save and Return
Cancel

Figure 2.1.2.1 – Task Type Detail Page Create Mode Mockup

Task Type Detail

* - Indicates required fields

Save and Return Cancel

Task Type Information

Name: * 11 months after Vocational Training Activity Start Date

Category: * Case Update

Priority: High

Available Online:

Available for Automation:

Instructions:

Expire Tasks: * No

Newly Assigned Indicator: * Tasks display indicator for 5 day(s)

Sub-Type Information

Name	Available Online	Available for Automation	Priority	Task Expiration
Add				

Append Information

Task Type	Task Sub-Type
<input type="checkbox"/>	
Add	
Remove	

Action Step Information

Order	Action Step
<input type="checkbox"/> 1	Verify the person's primary language is accurate.
<input type="checkbox"/> 2	
Add	
Remove	

Resulting Task Information

Dependencies

Task Type: 180-Day EC Good Cause set to expire

Task Sub-Type: 180-Day EC Good Cause set to expire

Due Date: - Select -

Distribution Type: - Select -

Bank:

Long Description:

Number of Calendar Days:

Program Worker:

Bank ID: Select

Save and Return Cancel

Figure 2.1.2.2 – Task Type Detail Page Edit Mockup

Task Type Detail

* - Indicates required fields

[Edit](#)
[Close](#)

Task Type Information

Name: * 11 months after Vocational Training Activity Start Date	Category: * Case Update	Priority: High
Available Online: No	Available for Automation: Yes	
Instructions:		
Expire Tasks: * No		
Newly Assigned Indicator: * Tasks display indicator for 5 day(s)		

▶ Sub-Type Information

▶ Append Information

▼ Action Step Information

Order	Action Step
1	Verify the person's primary language is accurate
2	Reassign programs to a worker who can speak the primary language
3	Take a break

▼ Resulting Task Information

[Dependencies](#)

Task Type: 180-Day EC Good Cause set to expire	
Task Sub-Type: 180-Day EC Good Cause set to expire	
Due Date: After Number of Calendar Days	Number of Calendar Days: 3
Distribution Type: Program Worker and/or Bank	Program Worker: Currently Assigned Worker
Bank: Specific Bank	Bank ID: 19DP0200D8BK
Long Description:	

[Edit](#)
[Close](#)

Figure 2.1.2.3 – Task Type Detail Page View Mode Mockup

2.1.3 Description of Changes

Update the Task Type Detail page in the CalSAWS System to allow configurations for Task Type Dependencies and Action Steps. Task Dependencies will allow configuration of a specific flow of Task Types. For Example, if a Task of Type A is completed, the CalSAWS System will automatically attempt to create a Task of Type B.

Action Steps allow a user to configure one or more specific steps that a worker may be required to action prior to completing the Task. Action Steps for Tasks will be determined by the Action Step Information panel based on if the Task has a Sub-Type or not. If a Task does not have a Sub-Type, Action Steps will only be determined from the Task Type Detail page. Similarly, if a Task does have a Sub-Type, Action Steps will only be determined from the Task Sub-Type Detail page.

1. Add an Action Step Information Panel

On initial load of the page, this panel will be collapsed if there are no Action Steps available for the Task Type. If one or more Action Steps are available, the panel will display as expanded with the Action Steps ordered ascending by the Order column.

- a. Selectable checkbox – In Create or Edit mode, for each row displayed, a selectable checkbox allows the user to select one or more Action Steps to be removed via the “Remove” button.
- b. Order – In Create or Edit mode, this column is a dropdown menu containing the numbers 1 through X where X is the number of Action Steps in the panel. This value controls the order the Action Steps will display on the Task Detail pages for Tasks that include Action Steps. When a new row is added in this panel, the default value in the Order field will be the total number of Action Steps in the panel. In view mode, Action Steps in this panel will display ordered ascending by this field.

Example: If the panel includes three Action Steps, the numbers 1, 2, and 3 will be available in this dropdown menu.

- c. Action Step – In Edit or Create mode, this is a free form text field that allows the User to input verbiage for the Action Step limited to 150 characters. This field allows inclusion of alphanumeric and special characters. On save of the field, if the “<” or “>” characters are included in this field, they will be removed during the save operation.
- d. **BUTTON:** Remove -- This button displays when the page is in Create or Edit mode and there exists at least one row in the Action Step Information panel. This button will remove any rows within the panel that have a checkmark selected in the Selectable Checkbox. The

remaining Action Steps will renumber automatically to account for the removal on 'Save and Return' of the page.

- e. **BUTTON:** Add -- This button displays when the page is in Create or Edit mode. This button adds an additional row to the end of the Action Step Information panel and displays the Selectable Checkbox, Order and Action Step fields.

Reference [Section 2.10](#) for additional information on Action Step functionality.

2. Add a Resulting Task Information Panel

This panel will allow a user to configure a relationship of one Task Type to another and build a flow of 2 or more Task Types/Sub-Types that will be created one after the other as each Task within a flow is completed. This panel includes the configuration options for the resulting Task that will be created at completion of the prior task. The panel will be collapsed on initial load of the page if there is no Resulting Task Information available, otherwise the panel will display expanded.

Example:

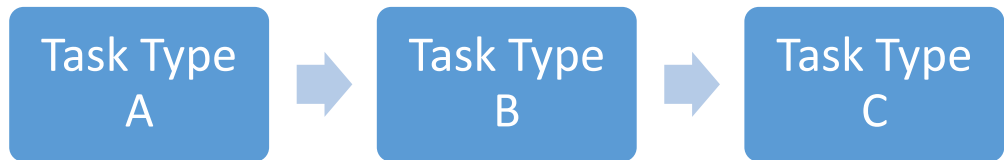


Figure 2.1.3.2.A – Task Type Dependencies Diagram

The above figure illustrates that Task Type A is configured to have a Task of Type B trigger to be created upon completion of a Task of Type A. Similarly, Task Type B is configured to have a Task of Type C trigger to be created upon completion of a Task of Type B.

Referencing Figure 2.1.3.2.A, a Task Type Dependency is one of the following:

- A Task Type/Sub-Type that precedes the current Task Type.
 - Task Type A is a preceding Dependency of Task Type B because creation of a Task with Task Type B will be triggered upon completion of a Task of Type A. Similarly, Task Type B is a preceding Dependency of Task Type C because creation of a Task with Task Type C will be triggered upon completion of a Task of Type B. Task Type

A is not a direct preceding Dependency of Task Type C even though it is part of the same flow.

- A Task Type/Sub-Type configured to succeed the current Task Type.
 - Task Type B is a resulting Dependency of Task Type A because a Task of Type B is configured to be created upon completion of a Task of Type A. Similarly, Task Type C is a resulting Dependency of Task Type B because a Task with Type C is configured to be created upon completion of a Task of Type B. Task Type C is not a direct resulting Dependency of Task Type A even though it is part of the same flow; completion of a Task of Type A will not trigger the creation of a Type C Task.

- a. **BUTTON:** Dependencies -- This button will direct the User to the Task Type and Sub-Type Dependencies page. (Reference [Section 2.3](#) for page specifics). This button will display if the Task Type has preceding or succeeding dependencies regardless of the page mode. The button will not be restricted by a specific security group/right; a user with security rights to access the Task Type Detail page can view and click this button.

- b. Task Type – The Task Type of the resulting Task to be created. When the page is in Create or Edit mode, this field will display as a dropdown with a maximum width of 50 characters that includes an alphabetical list of Task Types available to the county. A blank option will display at the top of the list allowing the user to remove a pre-selected Task Type. When the page is in View mode, this field will display the selected Task Type.

In Create or Edit mode of the page, if the panel is being completed for the first time, this is the only field that will display within this panel. If a value is selected in the dropdown, the subsequent attributes listed below will dynamically display.

If the Resulting Task Information panel was configured at a prior point in time, the user has the option to remove the configuration of this panel by selecting the blank value in the Task Type dropdown, which will remove all additional configurations within this panel on Save of the page.

- c. Task Sub-Type – An optional field that allows the User to indicate a Task Sub-Type for the resulting Task to be created. In Create or Edit mode, if the selected Task Type in the Task Type dropdown contains one or more Sub-Types, this field will include the associated Sub-Types in alphabetical order as a dropdown menu with a maximum width of 50 characters. If the selected Task Type does not include any Sub-Types, this field will not display. When the page is in View mode, this field will display the

Task Sub-Type if one has been selected, otherwise the field will not display.

- d. Due Date – A field indicating the rule that will be used to set the due date for the Task created by processing the configuration in Resulting Task Information Panel. Options included are:
 - i. After Number of Calendar Days - Will set the due date based on the System date plus the number of calendar days specified by the User.
 - ii. After Number of Business Days - Will set the due date based on the System date plus the number of business days specified by the User. Business days exclude weekends and County specific holidays.
 - iii. Last Day of Month - Will set the due date to the last day of the month of the System date.
 - iv. Last Day of Following Month - Will set the due date to the last day of the month following the month of the System date.

Based on the option chosen in the Due Date field, a dynamic field may display for additional data entry as follows:

Due Date Value	Dynamic Field Display
After Number of Calendar Days	A required "Number of Calendar Days" field will display. The input value must be a number from 0 – 999.
After Number of Business Days	A required "Number of Business Days" field will display. The input value must be a number from 0 – 999.

- e. Distribution Type – The Distribution Type that is applicable to the assignment configuration. When the page is in Create or Edit mode, this field is a dropdown that will display the following options:
 - i. Previous Task Assignment – This option will assign the resulting Task to the same Worker and/or Bank that was assigned to the preceding Task at the time of Task Completion.
 - ii. Program Worker and/or Bank – This option will cause the dynamic Program Worker and Bank fields to display for additional input.
 - iii. Office Distribution – This option employs the Office Distribution assignment functionality. Office Distribution processing will attempt to assign a resulting Task as follows:

Determine the case carrying worker by evaluating a hierarchy of the programs associated to the case and retrieving the worker associated to the highest

priority program. If the case carrying worker can accept the Task, assign the Task. If the case carrying worker cannot accept the Task, attempt to assign the Task to a worker in the case carrying worker's Unit who can accept the Task. If the Task still has not been assigned, retrieve Banks for the case carrying worker's Office and attempt to assign the Task to one of the Banks. If there are no valid Banks, attempt to assign the Task to a worker in the case carrying worker's Office who can receive the Task, otherwise assign the Task to the Office Supervisor.

- f. Program Worker– An optional field allowing a User to indicate a specific instruction for which worker to assign a resulting Task to. This field will display when the Distribution Type value is "Program Worker and/or Bank". The field will display as a dropdown menu when the page is in Create or Edit mode containing the following options:
 - 1. Currently Assigned Worker
 - 2. Most Recent Worker Within 30 Days
 - 3. Most Recent Worker Within 60 Days
 - 4. Most Recent Worker Within 90 Days
 - 5. Most Recent Worker Within 120 Days
 - 6. Most Recent Worker
 - 7. No Program Worker
- g. Bank – An optional field allowing a User to indicate a specific instruction for Bank assignment of any resulting Tasks. This field will display when the Distribution Type value is "Program Worker and/or Bank". The field will display as a dropdown menu when the page is in Create or Edit mode containing the following options:
 - i. Closest Bank – This option invokes processing to evaluate for a Bank that is the closest to the selected Program. Processing will first retrieve the most recent worker assigned to the program and retrieve Banks associated to the same Unit as the worker. The Bank must be configured to receive the Category of the Task. If no Banks are found, proceed to retrieve Banks associated to the same Office as the worker. The Bank must be configured to receive the Category of the Task. If no Banks are found, retrieve all Banks within the County that can receive the Category of the Task. If multiple Banks are returned, processing will select a single Bank. If a program worker cannot be retrieved, processing will evaluate Banks that can receive the Category of the Task at the County level.

- ii. Specific Bank – This option will prompt the User to provide a specific Bank ID to assign a resulting Task to.
- h. Bank ID – This attribute displays a single Bank ID that will be used for Task assignment. When the page is in Create or Edit mode and the Bank attribute value is “Specific Bank”, this field will dynamically display. A ‘Select’ **BUTTON** will display to the right of the field that will navigate to the Select Bank page allowing the User to search for and select a specific Bank ID.
- i. Long Description – A free text field will dynamically show when Task Type field is selected, allowing the User to add any additional details pertaining to the Task. This field will be limited to 2,000 characters.

2.1.4 Page Validations

1. “Order – Each Action Step must have a unique order value.”
 - a. A validation message displays when the User attempts to associate the same numeric value in the Order field for one or more Action Steps.
2. “Action Step – Duplicate Action Steps exist.”
 - a. A validation message displays when the User attempts to save a duplicate Action Step.
3. “Distribution Type – the Previous Task Assignment option cannot be chosen within the Resulting Task Information panel because a previous Task Type is not configured.”
 - a. A validation message displays when the User attempts to select “Previous Task Assignment” as the value for the Distribution Type field and there are no preceding Task Types configured.
4. “Due Date – Please select a value within the Resulting Task Information Panel.”
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected in the Resulting Task Information panel, and a value is not selected in the Due Date dropdown.
5. “Number of Calendar Days – Please input a value within the Resulting Task Information Panel.”
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected in the Resulting Task Information panel, the Due Date field value is “After Number of Calendar Days” and a value is not entered in the Number of Calendar Days field.
6. “Number of Business Days – Please input a value within the Resulting Task Information Panel.”

- a. Add a validation to display when the User attempts to save the page when a Task Type is selected in the Resulting Task Information panel, the Due Date field value is "After Number of Business Days" and the Number of Business Days value is NULL.
- 7. "Distribution Type – Please select a value in the Resulting Task Information Panel."
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected in the Resulting Task Information panel and a value is not selected for the Distribution Type field.
- 8. "Program Worker and/or Bank – Please select a value in the Program Worker and/or Bank fields of the Resulting Task Information Panel."
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected in the Resulting Task Information panel, the Distribution Type is "Program Worker/Bank" both the Program Worker and Bank fields are not entered.
- 9. "Bank ID – Please enter a Bank ID within the Resulting Task Information Panel."
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected, the Distribution Type value is "Program Worker and/or Bank", the Bank value is "Specific Bank" without a value in the Bank ID field.
- 10. "Bank ID – Bank ID within the Resulting Task Information Panel does not exist."
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected, the Distribution Type value is "Program Worker and/or Bank", the Bank value is "Specific Bank", and the Bank ID field includes a value that does not correspond to an existing Bank for the county.
- 11. "Program Worker – Tasks must be assigned to a Position or a Bank within the Resulting Task Information Panel."
 - a. Add a validation to display when the User attempts to save the page when a Task Type, and Task Sub-Type if applicable, Due Date, its dynamic field, and Distribution Type are inputted and "Program Worker and/or Bank" is selected within Distribution Type with "No Program Worker" selected in the Program Worker field, and no Bank ID populated in the Bank ID field.
- 12. "Number of Calendar Days - Value must be a number from 0 – 999. Please enter a different value."
 - a. When the User attempts to save a value other than a number from 0 – 999 in the Number of Calendar Days field in the Resulting Task Information panel, a validation message is triggered.

13. "Number of Business Days - Value must be a number from 0 – 999. Please enter a different value."

- a. When the User attempts to save a value other than a number from 0 – 999 in the Number of Business Days field in the Resulting Task Information Panel, a validation message is triggered.

2.1.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Types >
Click on a hyperlink of the desired result displayed in the Task Type Search page or the "Add Task Type" button to navigate to the Task Type Detail page.
The Task Navigation will display if the user profile contains the "TaskTypeListView" security right.

2.1.6 Security Updates

N/A – No Changes to Security

2.1.7 Page Mapping

Update page mapping for the Task Type Detail page.

2.1.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.2 Task Sub-Type Detail Page

2.2.1 Overview

The Task Sub-Type Detail page is accessible from the Sub-Type Information section of the Task Type Detail page. This page will be used to capture and display information about Task Sub-Types.

2.2.2 Task Sub-Type Detail Page Mockup

Task Sub-Type Detail

* - Indicates required fields

Save and Return Cancel

Task Sub-Type Information

Task Type:
1503- Client Index Number/MEDS-ID conflict

Sub-Type Name: * **Available Online:** **Available for Automation:** **Priority:**

Expire Tasks:

Append Information

Task Type	Task Sub-Type

Add

Action Step Information

Order	Action Step
<input type="checkbox"/> 1	<input type="text" value="Verify the person's primary language is accurate."/>
<input type="checkbox"/> 2	<input type="text"/>

Remove Add

Resulting Task Information

Dependencies

Task Type:

Task Sub-Type:

Due Date: **Number of Calendar Days:**

Distribution Type: **Program Worker:**

Bank: **Bank ID:** Select

Long Description:

Save and Return Cancel

Figure 2.2.2.1 – Task Sub-Type Detail Page Create Mode Mockup

Task Sub-Type Detail

*- Indicates required fields

Save and Return Cancel

Task Sub-Type Information

Task Type:
1503- Client Index Number/MEDS-ID conflict

Sub-Type Name: * SubType 1

Available Online:

Available for Automation:

Priority:

Expire Tasks:

Append Information

Action Step Information

Order	Action Step
<input type="checkbox"/> 1	Verify the person's primary language is accurate.
<input type="checkbox"/> 2	

Remove Add

Resulting Task Information

Dependencies

Task Type:

Task Sub-Type:

Due Date:

Number of Calendar Days: Required

Distribution Type:

Program Worker:

Bank:

Bank ID: Select

Long Description:

Save and Return Cancel

Figure 2.2.2.3 – Task Sub-Type Detail Page Edit Mode Mockup

Task Sub-Type Detail

*- Indicates required fields Edit Close

Task Sub-Type Information

Task Type:
1503- Client Index Number/MEDS-ID conflict

Sub-Type Name: * SubType 1 **Available Online:** Yes **Available for Automation:** No **Priority:**

Expire Tasks:

▶ **Append Information**

▼ **Action Step Information**

Order	Action Step
1	Verify the person's primary language is accurate
2	Reassign programs to a worker who can speak the primary language
3	Take a break

▼ **Resulting Task Information**

Dependencies

Task Type:
180-Day EC Good Cause set to expire

Task Sub-Type:
180-Day EC Good Cause set to expire

Due Date: After Number of Calendar Days **Number of Calendar Days:** 3

Distribution Type: Program Worker and/or Bank **Program Worker:** Currently Assigned Worker

Bank: Specific Bank **Bank ID:** 19DP0200D8BK

Long Description:

Edit Close

Figure 2.2.2.2 – Task Sub-Type Detail Page View Mode Mockup

2.2.3 Description of Changes

Update the Task Sub-Type Detail page in the CalSAWS System to allow configurations for Task Type/Task Sub-Type Dependencies and Action Steps.

Task Dependencies will allow configuration of a specific flow of Task Types/Task Sub-Types. For Example, if a Task of Type A is completed, the CalSAWS System will automatically attempt to create a Task of Type B.

Action Steps allow a user to configure one or more specific steps that a worker may be required to action prior to completing the Task. Action Steps for Tasks will be determined by the Action Step Information panel based on if the Task has a Sub-Type or not. If a Task does not have a Sub-Type, Action Steps will only be determined from the Task Type Detail page. Similarly, if a Task does have a Sub-Type, Action Steps will only be determined from the Task Sub-Type Detail page.

1. Add an Action Step Information Panel

On initial load of the page, this panel will be collapsed If there are no Action Steps available for the Task Sub-Type. If one or more Action Steps are available, the panel will display as expanded with the Action Steps ordered ascending by the Order column.

- a. Selectable checkbox – In Create or Edit mode, for each row displayed, a selectable checkbox allows the user to select one or more Action Steps to be removed via the “Remove” button.
- b. Order – In Create or Edit mode, this column is a dropdown menu containing the numbers 1 through X where X is the number of Action Steps in the panel. This value controls the order the Action Steps will display on the Task Detail pages for Tasks that include Action Steps. When a new row is added in this panel, the default value in the Order field will be the total number of Action Steps in the panel. In view mode, Action Steps in this panel will display ordered ascending by this field.

Example: If the panel includes three Action Steps, the numbers 1, 2, and 3 will be available in this dropdown menu.

- c. Action Step – In Edit or Create mode, this is a free form text field that allows the User to input verbiage for the Action Step limited to 150 characters.
- d. **BUTTON:** Remove -- This button displays when the page is in Create or Edit mode and there exists at least one row in the Action Step Information panel. This button will remove any rows within the panel that have a checkmark selected in the Selectable Checkbox. The remaining Action Steps will renumber automatically to account for the removal on ‘Save and Return’ of the page.
- e. **BUTTON:** Add -- This button displays when the page is in Create or Edit mode. This button adds an additional row to the end of the Action Step Information panel and displays the Selectable Checkbox, Order and Action Step fields.

Reference [Section 2.10](#) for additional information on Action Step functionality.

2. Add a Resulting Task Information Panel

This panel will allow a user to configure a relationship of one Task Type/Task Sub-Types to another and build a flow of 2 or more Task Types/Sub-Types that will be created one after the other as each Task within a flow is completed. This panel includes the configuration options for the resulting Task that will be created at completion of the prior task. The panel will be collapsed on initial load of the page if there is no Resulting Task Information available, otherwise the panel will display expanded.

Example:

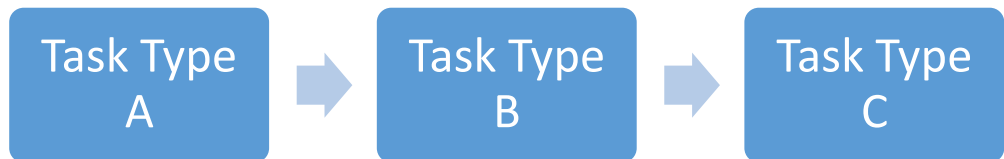


Figure 2.2.3.2.A – Task Type/Task Sub-Type Dependencies Diagram

The above figure illustrates that Task Type A is configured to have a Task of Type B trigger to be created upon completion of a Task of Type A. Similarly, Task Type B is configured to have a Task of Type C trigger to be created upon completion of a Task of Type B.

Referencing Figure 2.2.3.2.A, a Task Type/Task Sub-Type Dependency is one of the following:

- A Task Type/Sub-Type that precedes the current Task Type/Task Sub-Type.
 - Task Type A is a preceding Dependency of Task Type B because creation of a Task with Task Type B will be triggered upon completion of a Task of Type A. Similarly, Task Type B is a preceding Dependency of Task Type C because creation of a Task with Task Type C will be triggered upon completion of a Task of Type B. Task Type A is not a direct preceding Dependency of Task Type C even though it is part of the same flow.
- A Task Type/Sub-Type configured to succeed the current Task Type.

- o Task Type B is a resulting Dependency of Task Type A because a Task of Type B is configured to be created upon completion of a Task of Type A. Similarly, Task Type C is a resulting Dependency of Task Type B because a Task with Type C is configured to be created upon completion of a Task of Type B. Task Type C is not a direct resulting Dependency of Task Type A even though it is part of the same flow; completion of a Task of Type A will not trigger the creation of a Type C Task.
- a. **BUTTON:** Dependencies -- This button will direct the User to the Task Type and Sub-Type Dependencies page. (Reference [Section 2.3](#) for page specifics). This button will display if the Task Type/Task Sub-Type has preceding or succeeding dependencies regardless of the page mode. The button will not be restricted by a specific security group/right; a user with security rights to access the Task Sub-Type Detail page can view and click this button.
 - b. Task Type – The Task Type of the resulting Task to be created. When the page is in Create or Edit mode, this field will display as a dropdown with a maximum width of 50 characters that includes an alphabetical list of Task Types available to the county. A blank option will display at the top of the list allowing the user to remove a pre-selected Task Type. When the page is in View mode, this field will display the selected Task Type.
In Create or Edit mode of the page, if the panel is being completed for the first time, this is the only field that will display within this panel. If a value is selected in the dropdown, the subsequent attributes listed below will dynamically display.
If the Resulting Task Information panel was configured at a prior point in time, the user has the option to remove the configuration of this panel by selecting the blank value in the Task Type dropdown, which will remove all additional configurations within this panel on Save of the page.
 - c. Task Sub-Type – An optional field that allows the User to indicate a Task Sub-Type for the resulting Task to be created. In Create or Edit mode, if the selected Task Type in the Task Type dropdown contains one or more Sub-Types, this field will include the associated Sub-Types in alphabetical order as a dropdown menu with a maximum width of 50 characters. If the selected Task Type does not include any Sub-Types, this field will not display. When the page is in View mode, this field will display the Task Sub-Type if one has been selected, otherwise the field will not display.

- d. Due Date – A field indicating the rule that will be used to set the due date for the Task created by processing the configuration in Resulting Task Information Panel. Options included are:
 - i. After Number of Calendar Days - Will set the due date based on the System date plus the number of calendar days specified by the User.
 - ii. After Number of Business Days - Will set the due date based on the System date plus the number of business days specified by the User. Business days exclude weekends and County specific holidays.
 - iii. Last Day of Month - Will set the due date to the last day of the month of the System date.
 - iv. Last Day of Following Month - Will set the due date to the last day of the month following the month of the System date.

Based on the option chosen in the Due Date field, a dynamic field may display for additional data entry as follows:

Due Date Value	Dynamic Field Display
After Number of Calendar Days	A required "Number of Calendar Days" field will display. The input value must be a number from 0 – 999.
After Number of Business Days	A required "Number of Business Days" field will display. The input value must be a number from 0 – 999.

- e. Distribution Type – The Distribution Type that is applicable to the assignment configuration. When the page is in Create or Edit mode, this field is a dropdown that will display the following options:
 - i. Previous Task Assignment – This option will assign the resulting Task to the same Worker and/or Bank that was assigned to the preceding Task at the time of Task Completion.
 - ii. Program Worker and/or Bank – This option will cause the dynamic Program Worker and Bank fields to display for additional input.
 - iii. Office Distribution – This option employs the Office Distribution assignment functionality. Office Distribution processing will attempt to assign a resulting Task as follows:
 - Determine the case carrying worker by evaluating a hierarchy of the programs associated to the case and retrieving the worker associated to the highest priority program. If the case carrying worker can accept the Task, assign the Task. If the case carrying worker cannot accept the Task, attempt to assign the

Task to a worker in the case carrying worker's Unit who can accept the Task. If the Task still has not been assigned, retrieve Banks for the case carrying worker's Office and attempt to assign the Task to one of the Banks. If there are no valid Banks, attempt to assign the Task to a worker in the case carrying worker's Office who can receive the Task, otherwise assign the Task to the Office Supervisor.

- f. Program Worker– An optional field allowing a User to indicate a specific instruction for which worker to assign a resulting Task to. This field will display when the Distribution Type value is “Program Worker and/or Bank”. The field will display as a dropdown menu when the page is in Create or Edit mode containing the following options:
 - 1. Currently Assigned Worker
 - 2. Most Recent Worker Within 30 Days
 - 3. Most Recent Worker Within 60 Days
 - 4. Most Recent Worker Within 90 Days
 - 5. Most Recent Worker Within 120 Days
 - 6. Most Recent Worker
 - 7. No Program Worker
- g. Bank – An optional field allowing a User to indicate a specific instruction for Bank assignment of any resulting Tasks. This field will display when the Distribution Type value is “Program Worker and/or Bank”. The field will display as a dropdown menu when the page is in Create or Edit mode containing the following options:
 - i. Closest Bank – This option invokes processing to evaluate for a Bank that is the closest to the selected Program. Processing will first retrieve the most recent worker assigned to the program and retrieve Banks associated to the same Unit as the worker. The Bank must be configured to receive the Category of the Task. If no Banks are found, proceed to retrieve Banks associated to the same Office as the worker. The Bank must be configured to receive the Category of the Task. If no Banks are found, retrieve all Banks within the County that can receive the Category of the Task. If multiple Banks are returned, processing will select a single Bank. If a program worker cannot be retrieved, processing will evaluate Banks that can receive the Category of the Task at the County level.
 - ii. Specific Bank – This option will prompt the User to provide a specific Bank ID to assign a resulting Task to.

- h. Bank ID – This attribute displays a single Bank ID that will be used for Task assignment. When the page is in Create or Edit mode and the Bank attribute value is “Specific Bank”, this field will dynamically display. A ‘Select’ **BUTTON** will display to the right of the field that will navigate to the Select Bank page allowing the User to search for and select a specific Bank ID.
- i. Long Description – A free text field will dynamically show when Task Type field is selected, allowing the User to add any additional details pertaining to the Task. This field will be limited to 2,000 characters.

2.2.4 Page Validations

1. “Order – Each Action Step must have a unique order value.”
 - a. A validation message displays when the User attempts to associate the same numeric value in the Order field for one or more Action Steps.
2. “Action Step – Duplicate Action Steps exist.”
 - a. A validation message displays when the User attempts to save a duplicate Action Step.
3. “Distribution Type – the Previous Task Assignment option cannot be chosen within the Resulting Task Information panel because a previous Task Type is not configured.”
 - a. A validation message displays when the User attempts to select “Previous Task Assignment” as the value for the Distribution Type field and there are no preceding Task Types configured.
4. “Due Date – Please select a value within the Resulting Task Information Panel.”
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected in the Resulting Task Information panel, and a value is not selected in the Due Date dropdown.
5. “Number of Calendar Days – Please input a value within the Resulting Task Information Panel.”
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected in the Resulting Task Information panel, the Due Date field value is “After Number of Calendar Days” and a value is not entered in the Number of Calendar Days field.
6. “Number of Business Days – Please input a value within the Resulting Task Information Panel.”
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected in the Resulting Task

Information panel, the Due Date field value is "After Number of Business Days" and the Number of Business Days value is NULL.

7. "Distribution Type – Please select a value in the Resulting Task Information Panel."
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected in the Resulting Task Information panel and a value is not selected for the Distribution Type field.
8. "Program Worker and/or Bank – Please select a value in the Program Worker and/or Bank fields of the Resulting Task Information Panel."
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected in the Resulting Task Information panel, the Distribution Type is "Program Worker and/or Bank" both the Program Worker and Bank fields are not entered.
9. "Bank ID – Please enter a Bank ID within the Resulting Task Information Panel."
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected, the Distribution Type value is "Program Worker and/or Bank", the Bank value is "Specific Bank" without a value in the Bank ID field.
10. "Bank ID – Bank ID within the Resulting Task Information Panel does not exist."
 - a. Add a validation to display when the User attempts to save the page when a Task Type is selected, the Distribution Type value is "Program Worker and/or Bank", the Bank value is "Specific Bank", and the Bank ID field includes a value that does not correspond to an existing Bank for the county.
11. "Program Worker – Tasks must be assigned to a Position or a Bank within the Resulting Task Information Panel."
 - a. Add a validation to display when the User attempts to save the page when a Task Type, and Task Sub-Type if applicable, Due Date, its dynamic field, and Distribution Type are inputted and "Program Worker and/or Bank" is selected within Distribution Type with "No Program Worker" selected in the Program Worker field, and no Bank ID populated in the Bank ID field.
12. "Number of Calendar Days - Value must be a number from 0 – 999. Please enter a different value."
 - a. When the User attempts to save a value other than a number from 0 – 999 in the Number of Calendar Days field in the Resulting Task Information panel, a validation message is triggered.
13. "Number of Business Days - Value must be a number from 0 – 999. Please enter a different value."

- a. When the User attempts to save a value other than a number from 0 – 999 in the Number of Business Days field in the Resulting Task Information Panel, a validation message is triggered.

2.2.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Types

The Name hyperlink, Edit and Add buttons in the Sub-Type information section of the Task Type Detail page will navigate to the Task Sub-Type Detail page.

2.2.6 Security Updates

N/A – No Changes to Security

2.2.7 Page Mapping

Update page mapping for the Task Sub-Type Detail page.

2.2.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.3 Task Type and Sub-Type Dependencies Page

2.3.1 Overview

The Task Type and Sub-Type Dependencies page is accessible from the Task Type and Sub-Type Detail pages. This page will be used to capture and display information about Task Type and Task Sub-Type dependencies.

2.3.2 Task Type and Sub-Type Dependencies Mockup

Task Type and Sub-Type Dependencies

Close

Task Type:
180-Day EC Good Cause set to expire

Task Sub-Type:
180-Day EC Good Cause set to expire

▼ Previous Task Information

Task Type/Sub-Type	Action Steps
Document Received/SAR 7	Action Step 1 Action Step 2
Document Received/MC Packet	Action Step 1 Action Step 2 Action Step 3
Task Type 3	

▼ Resulting Task Information

Task Type/Sub-Type	Action Steps
Run EDBC	Action Step 1 Action Step 2
Followed by	
Take a Break	Action Step 1 Action Step 2 Action Step 3

Close

Figure 2.3.2.1 – Task Type and Sub-Type Dependencies Page View Mode Mockup

2.3.3 Description of Changes

Add a Task Type and Sub-Type Dependencies page to the CalSAWS System that is only available in View mode.

1. General Information

- a. Task Type – This page is accessed from the Task Type Detail or Task Sub-Type Detail page. This value displays the Task Type value from the page that the user clicked the Dependencies button on.
- b. Task Sub-Type – If this page was accessed via the Dependencies button the Task Sub-Type Detail page, this field displays the Sub-Type name from the Task Sub-Type Detail page. If this page was accessed via the Dependencies button on the Task Type Detail page, this field will not display.

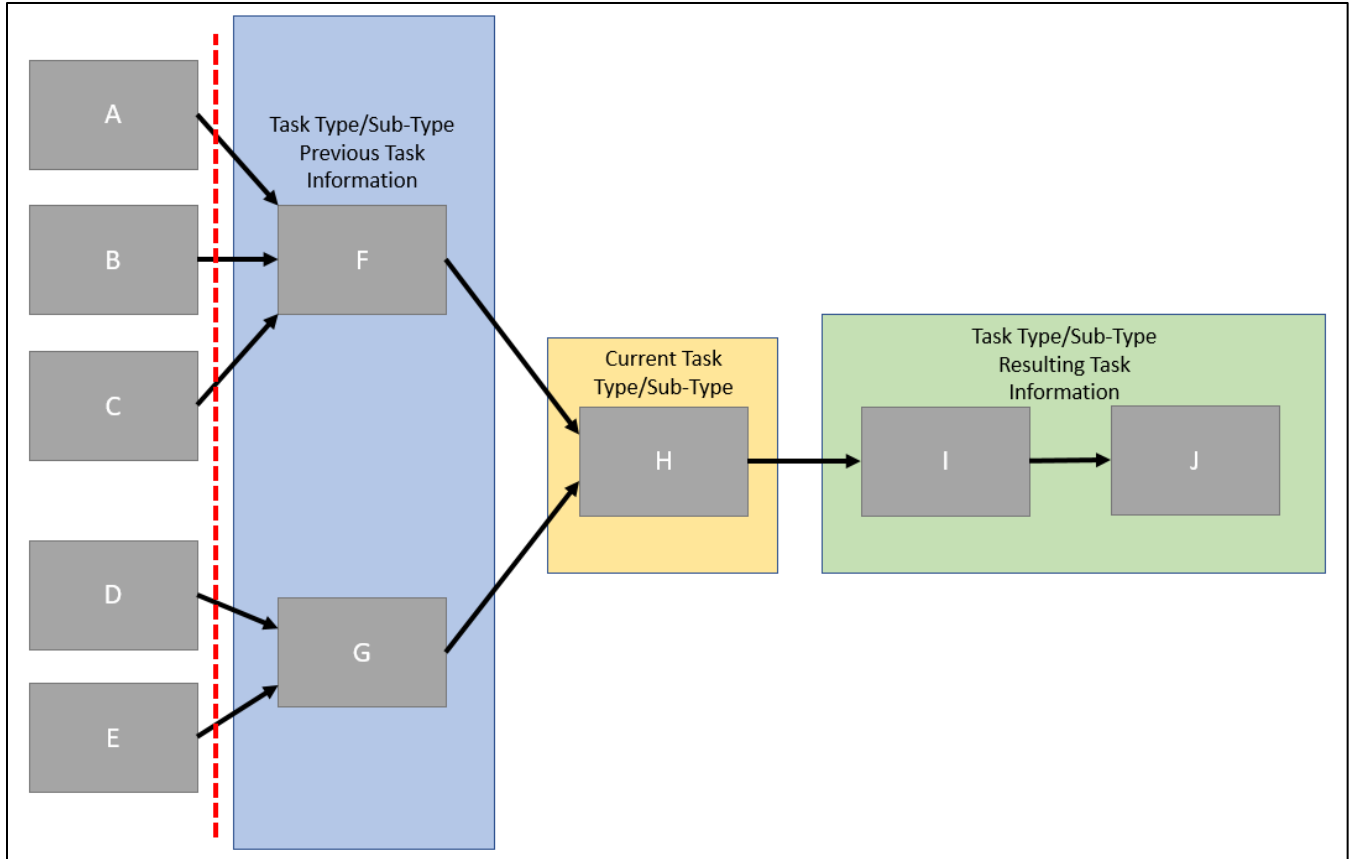


Figure 2.3.3.1.A: Dependencies Diagram

2. Previous Task Information Panel

Displays Task Types/Task Sub-Types with the Resulting Task Information panel from the Task Type/Task Sub-Type Detail page configured with a Task Type/Task Sub-Type that matches the Task Type/Task Sub-Type header values on this page. In other words, this panel displays Task Types and Sub-Types that have been configured to result in the Task Type/Sub-Type in the General Information header of this page. This panel will only include the immediate predecessors, not the entire preceding chain of Task Type/Sub-Types. This panel will appear collapsed if there are no predecessors.

Example: With reference to Figure 2.3.3.1.A, each grey box indicates a distinct Task Type/Sub-Type for the purpose of this example. If the Task Type and Sub-Type Dependencies page was accessed by clicking the Dependencies button for Task Type “H” on the Task Type Detail page, this panel will include Task Types “F” and “G”. Task Types “A” through “E” are not included in this panel because these are not immediate predecessors to Task Type “H”.

- a. Task Type/Sub-Type – This column displays the Task Type, and Sub-type, if applicable with a “/” separating the Task Type and Sub-Type value. If a Sub-Type is not applicable, only the Task Type will display.
- b. Action Steps – This column displays the Action Steps for the Task Type/Sub-Type column value. Action Steps will display ordered ascending by the Action Steps Order attribute. If the Task Type/Sub-Type does not include Action Steps for the row, this column will be blank.

3. Resulting Task Information Panel

Displays existing Task Types/Task Sub-Types that are configured to follow the current Task Type/Task Sub-Type displayed in the General Information section of the page. This panel will include the entire flow of successors going forward from the Task Type/Task Sub-Type displayed in the General Information section of the page. This panel will appear collapsed if there is no Resulting Task Information configured.

Example: With reference to Figure 2.3.3.1.A, if the Task Type and Sub-Type Dependencies page was accessed by clicking the Dependencies button for Task Type “H” on the Task Type Detail page, this panel will include Task Types “I” and “J”.

- a. Task Type/Sub-Type – This column displays the Task Type, and Sub-type, if applicable with a “/” separating the Task Type and Sub-Type value. If a Sub-Type is not applicable, only the Task Type will display. Each Task Type/Sub-Type within this column after the first row will be preceded by a row that displays “Followed by”. (Reference Figure 2.3.2.1).
 - b. Action Steps – This column displays the Action Steps for the Task Type/Sub-Type column value. Action Steps will display ordered ascending by the Action Steps Order attribute. If the Task Type/Sub-Type does not include Action Steps for the row, this column will be blank. Similarly, if the value in the Task Type/Sub-Type column is “Followed by”, this column will not be populated.
4. **BUTTON:** Close – This button displays when the page is in view mode, and because this page is available exclusively in View mode, this button will always display. Clicking the button will navigate back to the Task Type Detail page, or Task Sub-Type Detail that the user first clicked the “Dependencies” button on.

2.3.4 Page Location

- **Global:** Admin Tools

- **Local:** Admin
- **Task:** Tasks > Task Types >
 - After accessing a specific Task Type Detail or Task Sub-Type Detail page, click on the Dependencies button to navigate to the Task Type and Sub-Type Dependencies page.

2.3.5 Security Updates

N/A – No Changes to Security

2.3.6 Page Mapping

Implement page mapping for the Task Type and Sub-Type Dependencies page.

2.3.7 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.4 Task Search Pop-Up Page

2.4.1 Overview

The Task Search Pop-Up page allows Users to search, view, create, and edit Tasks.

2.4.2 Task Search Pop-Up Page Mockup

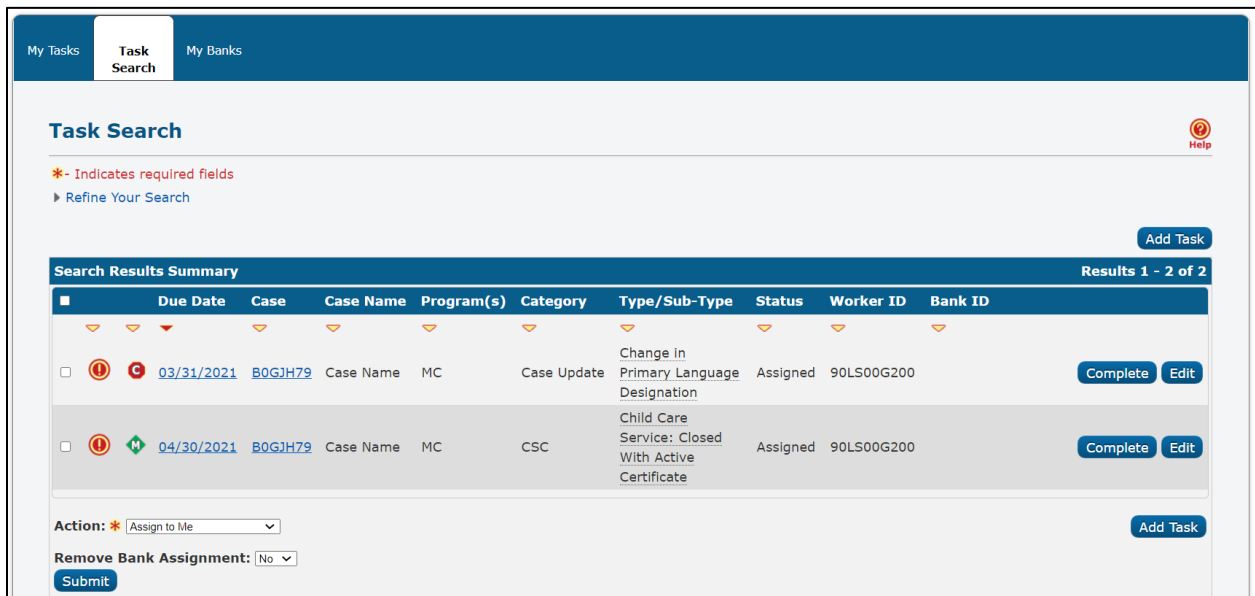


Figure 2.4.2.1 – Task Search Pop-Up Page Reference

2.4.3 Description of Changes

1. Update the Task Search Pop-Up page to evaluate for Task Action step completion when required. If a User attempts to complete a Task on this page via the Complete button, the Task has incomplete Action Steps and the User's "Task Action Step Completion Required" attribute on the Position Detail page is "Yes" (reference [Section 2.9](#) for more information), a validation message will display. This message informs the User that the Action Steps for the Task must be completed before the Task can be Completed. The validation message will read:

- a. "Complete – All Action Steps must be actioned before the Task can be completed."

If the user that clicks the "Complete" button to complete a Task, and the User's "Task Action Step Completion Required" attribute on the Position Detail page is "No", the Task will be completed regardless of the Action Steps being completed or not. A validation message will not display.

2.4.4 Page Location

N/A

2.4.5 Security Updates

N/A – No Changes to Security

2.4.6 Page Mapping

N/A – No Changes to Page Mapping

2.4.7 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.5 My Tasks Pop-Up Page

2.5.1 Overview

The My Tasks Pop-Up page allows Users to view and edit Tasks assigned to the logged in User.

2.5.2 My Tasks Pop-Up Page Mockup

My Tasks | Task Search | My Banks

My Tasks Help

Staff: Mayuri Srinivas | Worker ID: 90LS00G200

Results per Page: 25 Search

Search Results Summary Results 1 - 2 of 2 Get Next

Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Date Assigned	Program Worker	
03/31/2021	B0GJH79	Case Name	MC	Case Update	Change in Primary Language Designation	Assigned	04/05/2021	19DP04700M	Complete Edit
04/30/2021	B0GJH79	Case Name	MC	CSC	Child Care Service: Closed With Active Certificate	Assigned	04/05/2021	19DP04700M	Complete Edit

Get Next

Figure 2.5.2.1 – My Tasks Pop-Up Page Reference

2.5.3 Description of Changes

1. Update the My Tasks Pop-Up page to evaluate for Task Action step completion when required. If a User attempts to complete a Task on this page via the Complete button, the Task has incomplete Action Steps and the User's "Task Action Step Completion Required" attribute on the Position Detail page is "Yes" (Reference [Section 2.9](#) for more information), a validation message will display. This message informs the User that the Action Steps for the Task must be completed before the Task can be Completed. The validation message will read:
 - a. "Complete – All Action Steps must be actioned before the Task can be completed."

If the user that clicks the "Complete" button to complete a Task, and the User's "Task Action Step Completion Required" attribute on the Position Detail page is "No", the Task will be completed regardless of the Action Steps being completed or not. A validation message will not display.

2.5.4 Page Location

N/A

2.5.5 **Security Updates**

N/A – No Changes to Security

2.5.6 **Page Mapping**

N/A – No Changes to Page Mapping

2.5.7 **Page Usage/Data Volume Impacts**

There are no expected page usage/volume impacts.

2.6 **Task Detail Pop-Up Page**

2.6.1 **Overview**

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

2.6.2 Task Detail Pop-Up Page Mockup

←

Task Detail

→
Help

Result 1 of 1 - 1

*- Indicates required fields

Edit Print Close

Case Number T57D42B	Case Name: Case Name	Program(s): * Medi-Cal - BARRY KENNICOT	Status: * Assigned
Category: * Case Update	Type: * Change in Primary Language Designation	Sub-Type:	Reference Number: Assigned
Due Date: * 05/12/2021	Date Created: 04/28/2021	Worker Assigned Date: 05/07/2021	Priority: Critical
Assign to Program Worker: No	Worker ID: 90LS00G200	Bank ID:	Automated Action: No

Long Description:
hello

▶ Instructions

▼ Action Steps

Step #	Name	Status	Status Date	Updated By
1	Verify the person's primary language is accurate	Completed	03/18/2021	Mayuri Srinivas (90LS00BU00)
2	Reassign programs to a worker who can speak the primary language	Not Applicable	03/18/2021	Mayuri Srinivas (90LS00BU00)
3	Take a break			

▶ Task History

Edit Print Close

Figure 2.6.2.1 – Task Pop-Up Task Detail Page View Mode Mockup

Task Detail

Result 1 of 1 - 3

*- Indicates required fields

Case Number B0GJH79	Case Name: Case Name	Program(s): Medi-Cal - PORFIRIO CONNOR	Status: * Assigned	Reference Number:
Category: * Case Update	Type: * Change in Primary Language Designation	Sub-Type:	Priority: Critical	
Due Date: * 03/31/2021	Date Created: 03/30/2021	Worker Assigned Date: 04/28/2021		
Assign to Program Worker: No	Worker ID: 90LS00HR00 <input type="button" value="Select"/>	Bank ID: <input type="text"/> <input type="button" value="Select"/>	Automated Action: No	

Long Description:

Instructions

Action Steps

Step #	Name	Status	Status Date	Updated By	
1	Verify the person's primary language is accurate	Completed	03/18/2021	Mayuri Srinivas (90LS00BU00)	<input type="button" value="Undo"/>
2	Reassign programs to a worker who can speak the primary language	Not Applicable	03/18/2021	Mayuri Srinivas (90LS00BU00)	<input type="button" value="Undo"/>
3	Take a break				<input type="button" value="Complete"/> <input type="button" value="N/A"/>

Task History

Figure 2.6.2.2 – Task Pop-Up Task Detail Page Edit Mode Mockup

2.6.3 Description of Changes

1. Add an Action Steps panel to the Task Detail Pop-Up page. This panel will be a collapsible panel below the "Instructions" panel. This panel will only display if the Task has one or more Action Steps otherwise the panel does not display on the page. The panel will display expanded by default. The Action steps will be ordered by the value in the "Step #" column.
 - a. Step # – A column to display the Order attribute of the individual Action Step.
 - b. Name – This column will display the "Action Step" attribute from the Action Step Information panel on the Task Type Detail/Task

Sub-Type Detail page. Text will wrap within the column if the length exceeds the column width.

- c. Status – The Status of the Action Step. If an Action Step has not been actioned, this column will be blank. This column will populate with “Completed” or “Not Applicable” if it is not blank. Text will wrap within the column if the length exceeds the column width.
- d. Status Date – A column to indicate the date the Action Step status was changed with via the Complete or N/A button. This column will only have a value once the Complete or N/A button is clicked for an Action Step and the page is saved. This column will be formatted as MM/DD/YYYY.
- e. Updated By – A column to indicate the User that changed the status of the Action step by clicking the Complete or N/A button. This column will only have a value once the button is clicked and the page is saved from edit mode. The format is the First and Last name of the Staff followed by the Worker ID, in parentheses, that the User was in the context of while actioning the Action Step. Please refer to Mockup Figure 2.6.2.1 and 2.6.2.2 for more details. Text will wrap within the column if the length exceeds the column width.
- f. **BUTTON:** Complete – Displays when the page is in edit mode. On click, the Action Step for the row will be set with a Status of “Completed”, a Status date of the current date and the Updated By column will be populated. This button will display if the worker’s security profile contains the “TaskDetailEdit” security right, the Action Step Status is blank, and the Task Status is Assigned or In Process.
- g. **BUTTON:** Undo – Displays when the page is in edit mode. On click, the Status, Status Date and Updated by columns for the Action Step will be set to blank. This button will display if the worker’s security profile contains the “TaskDetailEdit” security right and the Action Step has a Status of “Completed” or “Not Applicable”.
- h. **BUTTON:** N/A – Displays when the page is in edit mode. On click, the Action Step for the row will be set with a Status of “Not Applicable”, a Status Date of the current date and the Updated By column will be populated. This button will display if the worker’s security profile contains the “TaskDetailEdit” security right, the Action Step Status is blank, and the Task Status is Assigned or In Process.

2. Task History transactions will not be logged for Action Step Complete, Not Applicable, or Undo actions.

2.6.4 Validations

1. "Status – All Action Steps must be actioned before the Task can be completed."
 - a. This validation message will display if the User attempts to complete a Task on this page by updating the Status of the Task to Completed and saving the page without setting a status to all Action Steps and the User's "Task Action Step Completion Required" attribute on the Position Detail page is "Yes" (Reference [Section 2.9](#) for more information).

2.6.5 Page Location

N/A

2.6.6 Security Updates

N/A – No Changes to Security

2.6.7 Page Mapping

Update page mapping for the Task Pop-Up Task Detail page.

2.6.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.7 Worklist List Page

2.7.1 Overview

The Worklist pages allow workers to search, view, create, and edit Tasks as well as request new Tasks.

2.7.2 Worklist List Page Mockup

Worklist

*- Indicates required fields Search

Category:
Status:
Priority:

Case Number: Select

Organization Level:
Organization Number: Select

Organization Name: Mayuri Srinivas

Search By:

From:
To:

Primary Case Language:

English
 Spanish
 Afghani

Results per Page: Search

Search Results Summary Results 1 - 2 of 2

Add Task

	Type / Sub-Type	Worker ID	Case Number	Status	Assigned Date	Due Date	Language	
<input type="checkbox"/>	Change in Primary Language Designation	90LS00G200	B0GJH79	Assigned	04/05/2021	ⓘ 03/31/2021	Spanish	Edit
<input type="checkbox"/>	Child Care Service: Closed With Active Certificate	90LS00G200	B0GJH79	Assigned	04/05/2021	04/30/2021	Spanish	Edit

Complete
Add Task

Assign: * Reassign
Assign To: Select

Get Next

Category:

Primary Case Language:

English
 Spanish
 Afghani

Get Next

Figure 2.7.2.1 – Worklist List Page Reference

2.7.3 Description of Changes

1. If a User attempts to complete one or more Tasks on this page via the Complete button, at least one of the Tasks has incomplete Action Steps and the User's "Task Action Step Completion Required" attribute on the Position Detail page is "Yes"(Reference [Section 2.9](#) for more information), a validation message will display. This message informs the User that the Action Steps for the Tasks must be completed before the Tasks can be Completed. The validation message will read:
 - a. "Complete – All Action Steps must be actioned before the Task(s) can be completed."

If the user that clicks the "Complete" button to complete the Task(s), and the User's "Task Action Step Completion Required" attribute on the Position Detail page is "No", the Task(s) will be completed regardless of the Action Steps being completed or not. A validation message will not display.

2.7.4 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Worklist

2.7.5 Security Updates

N/A – No Changes to Security

2.7.6 Page Mapping

N/A – No Changes to Page Mapping

2.7.7 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.8 Worklist Task Detail Page

2.8.1 Overview

The Worklist Task Detail page allows a worker to create, edit and complete a Task. This page is also accessed by invoking Guided

Navigation from the Worklist, Worklist PR RE and Pending Authorizations pages.

2.8.2 Worklist Task Detail Page Mockup

Task Detail

*- Indicates required fields

Case Number: * B0GJH79

Save and Return
Cancel

Category: Case Update **Status:** Assigned

Type: Change in Primary Language Designation

Created Date: 02/01/2021 **Worker Assigned:** * 90LS00BU00 Select **Assigned Date:** 02/25/2021

Due Date: * **Expiration Date:**

Long Description:

Mark Task as Complete?

▼ **Action Steps**

Step #	Name	Status	Status Date	Updated By	
1	Verify the person's primary language is accurate	Completed	03/18/2021	Mayuri Srinivas (90LS00BU00)	Undo
2	Reassign programs to a worker who can speak the primary language	Not Applicable	03/18/2021	Mayuri Srinivas (90LS00BU00)	Undo
3	Take a break				Complete N/A

▶ **Task History**

Modified on 02/25/2021 1:24:32 PM by Mayuri Srinivas (90LS00BU00)

Field	Old Value	New Value
Worker	19AS0000B7	90LS00BU00

Save and Return
Cancel

Figure 2.8.2.1 – Worklist Task Detail Page Edit Mode Mockup

2.8.3 Description of Changes

1. Add an Action Steps panel to the Worklist Task Detail page. This panel will be a collapsible panel between the general information panel and the Task History panel. This panel will only display if the Task has one or more Action Steps otherwise the panel does not display on the page. The panel will display expanded by default. The Action steps will be ordered by the value in the "Step #" column.
 - a. Step # – A column to display the Order attribute of the individual Action Step.
 - b. Name – This column will display the "Action Step" attribute from the Action Step Information panel on the Task Type Detail/Task Sub-Type Detail page. Text will wrap within the column if the length exceeds the column width.
 - c. Status – The Status of the Action Step. If an Action Step has not been actioned, this column will be blank. This column will populate with "Completed" or "Not Applicable" if it is not blank. Text will wrap within the column if the length exceeds the column width.
 - d. Status Date – A column to indicate the date the Action Step status was changed with via the Complete or N/A button. This column will only have a value once the Complete or N/A button is clicked for an Action Step and the page is saved. This column will be formatted as MM/DD/YYYY.
 - e. Updated By – A column to indicate the User that changed the status of the Action step by clicking the Complete or N/A button. This column will only have a value once the button is clicked and the page is saved from edit mode. The format is the First and Last name of the Staff followed by the Worker ID, in parentheses, that the User was in the context of while actioning the Action Step. Please refer to Mockup Figure 2.6.2.1 and 2.6.2.2 for more details. Text will wrap within the column if the length exceeds the column width.
 - f. **BUTTON:** Complete – Displays when the page is in edit mode. On click, the Action Step for the row will be set with a Status of "Completed", a Status date of the current date and the Updated By column will be populated. This button will display if the worker's security profile contains the "TaskDetailEdit"

security right, the Action Step Status is blank, and the Task Status is Assigned or In Process.

- g. **BUTTON:** Undo – Displays when the page is in edit mode. On click, the Status, Status Date and Updated by columns for the Action Step will be set to blank. This button will display if the worker's security profile contains the "TaskDetailEdit" security right and the Action Step has a Status of "Completed" or "Not Applicable".
- h. **BUTTON:** N/A – Displays when the page is in edit mode. On click, the Action Step for the row will be set with a Status of "Not Applicable", a Status Date of the current date and the Updated By column will be populated. This button will display if the worker's security profile contains the "TaskDetailEdit" security right, the Action Step Status is blank, and the Task Status is Assigned or In Process.

- 2. Task History transactions will not be logged for Action Step Complete, Not Applicable, or Undo actions.

2.8.4 Validations

- 1. "Mark Task as Complete – All Action Steps must be actioned before the Task can be completed."
 - a. This validation message will display if the User attempts to complete a Task on this page by selecting the "Mark Task as Complete?" checkbox and clicking Save and Return without first actioning all Action Steps and the User's "Task Action Step Completion Required" attribute on the Position Detail page is "Yes" (reference [Section 2.9](#) for more information).

2.8.5 Page Location

- **Global:** Case Info
- **Local:** Tasks
- **Task:** Worklist

2.8.6 Security Updates

N/A – No Changes to Security

2.8.7 Page Mapping

Update page mapping for the Worklist Task Detail page.

2.8.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.9 Position Detail Page

2.9.1 Overview

The Position Detail pages allow Users to create and configure Positions.

2.9.2 Position Detail Page Mockup

Position Detail

* - Indicates required fields

Save
Save and Copy
Cancel

General Position Information

Worker ID:

Office Name: *
Select

Unit ID: *
Select

Assignment Type Code:

Auto Assign Indicator:

SSI Referrals:

Authorization Sampling Percentage:

Case Load:
Traditional

IHSS Referrals Auto Assignment: *

Section:
Select

Position Status: *

Worker Level:

Max Case Load:

Max Intake Case Load:

Current Case Load:
0

Total Percentage of Cases Assigned:
0%

Task Action Step Completion Required:

Appointment Threshold

Category	Type	Daily Threshold	
<input type="text"/>	<input type="text"/>	<input type="text"/>	Add
Remove			

Program(s)

<input type="checkbox"/> AAP	<input type="checkbox"/> CAPI	<input type="checkbox"/> CFET
<input type="checkbox"/> Cal-Learn	<input type="checkbox"/> CalFresh	<input type="checkbox"/> CalWORKs
<input type="checkbox"/> Child Care	<input type="checkbox"/> Disaster CalFresh	<input type="checkbox"/> Diversion
<input type="checkbox"/> Foster Care	<input type="checkbox"/> GROW	<input type="checkbox"/> Homeless - Perm
<input type="checkbox"/> Homeless - Temp	<input type="checkbox"/> Immediate Need	<input type="checkbox"/> Kin-GAP
<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Nutrition Benefit	<input type="checkbox"/> RCA
<input type="checkbox"/> REP	<input type="checkbox"/> Welfare to Work	

Case Flags

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"/> MC 355
<input type="checkbox"/> e-Application	<input type="checkbox"/> MEDS Alert	<input type="checkbox"/> MEDS Liaison
<input type="checkbox"/> e-ICT	<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

Phone Information

Type *	Number *	Extension	
<input type="text"/>	<input type="text"/>	<input type="text"/>	Add

Quality Review Type(s)

Legacy File Number

Save
Save and Copy
Cancel

Figure 2.9.2.1 – Position Detail Page Mockup Create Mode

Position Detail

*- Indicates required fields

Save Save and Copy Cancel

General Position Information

Worker ID:
36LS000D00

Office Name: *
CalSAWS Project Office

Unit ID: *
0D 00

Assignment Type Code:
[Dropdown]

Auto Assign Indicator:
[Dropdown]

SSI Referrals:
No [Dropdown]

Authorization Sampling Percentage:
0

Case Load:
Traditional

IHSS Referrals Auto Assignment: *
No [Dropdown]

Section:
0D Select

Position Status: *
Active [Dropdown]

Worker Level:
2nd Level Reception Log/Authorization [Dropdown]

Max Case Load:
0

Max Intake Case Load:
[Input]

Current Case Load:
0

Total Percentage of Cases Assigned:
0%

Task Action Step Completion Required:
[Dropdown]

Appointment Threshold

Category	Type	Daily Threshold
[Dropdown]	[Dropdown]	[Input]
Remove		Add

Program(s)

<input type="checkbox"/> AAP	<input type="checkbox"/> CAPI	<input type="checkbox"/> CFET
<input type="checkbox"/> Cal-Learn	<input type="checkbox"/> CalFresh	<input type="checkbox"/> CalWORKs
<input type="checkbox"/> Child Care	<input type="checkbox"/> Disaster CalFresh	<input type="checkbox"/> Diversion
<input type="checkbox"/> Foster Care	<input type="checkbox"/> GROW	<input type="checkbox"/> Homeless - Perm
<input type="checkbox"/> Homeless - Temp	<input type="checkbox"/> Immediate Need	<input type="checkbox"/> Kin-GAP
<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> Nutrition Benefit	<input type="checkbox"/> RCA
<input type="checkbox"/> REP	<input type="checkbox"/> Welfare to Work	

Case Flags

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"/> MC 355
<input type="checkbox"/> e-Application	<input type="checkbox"/> MEDS Alert	<input type="checkbox"/> MEDS Liaison
<input type="checkbox"/> e-ICT	<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

Phone Information

Type *	Number *	Extension
[Dropdown]	[Input]	[Input]
		Add

Quality Review Type(s)

Legacy File Number

Last Updated On 03/26/2021 6:43:22 PM By: 92

Save Save and Copy Cancel

Figure 2.9.2.2 – Position Detail Page Mockup Edit Mode

Position Detail

*- Indicates required fields

[Edit](#)
[Copy](#)
[Close](#)

General Position Information

Worker ID: 36LS000D00	Section: 0D
Office Name: * CalSAWS Project Office	Position Status: * Active
Unit ID: * 0D 00	Worker Level: 2nd Level Reception Log/Authorization
Assignment Type Code:	Max Case Load:
Auto Assign Indicator:	Max Intake Case Load:
SSI Referrals: No	Current Case Load: 0
Authorization Sampling Percentage: 0	Total Percentage of Cases Assigned: 0%
Case Load: Traditional	Task Action Step Completion Required: Yes
IHSS Referrals Auto Assignment: * No	

Appointment Threshold

Category	Type	Daily Threshold
No Data Found		

Program(s)

AAP	CAPI	CFET
Cal-Learn	CalFresh	CalWORKs
Child Care	Disaster CalFresh	Diversion
Foster Care	GROW	Homeless - Perm
Homeless - Temp	Immediate Need	Kin-GAP
Medi-Cal	Nutrition Benefit	RCA
REP	Welfare to Work	

Case Flags

Tasks

Application (All)	Case Update	EBT
Application Registration	Foster Care RDB	Fraud
CMIPSII	IEVS	IEVS Criminal
CalHEERS	IEVS Priority	MC 355
e-Application	MEDS Alert	MEDS Liaison
e-ICT	QR7LA	Quality Assurance Assignment
	Redetermination	SAR7
	Screening Packet	YBN E-communications

Phone Information

Type	Number	Extension
No Data Found		

[Quality Review Type\(s\)](#)
[Legacy File Number](#)

Last Updated On 03/26/2021 6:43:22 PM By: [92](#)

[Edit](#)
[Copy](#)
[Close](#)

Figure 2.9.2.3 – Position Detail Page Mockup View Mode

2.9.3 Description of Changes

1. Update the Position Detail page to include an optional "Task Action Step Completion Required" field. This field is a dropdown field within the General Position Information panel allowing a User to indicate if the position must first action all Task Action Steps before a Task is completed. This field will display the following options in the order displayed:
 - a. Blank
 - b. "Yes"
 - c. "No"

Note: This field will not be pre-populated for existing Positions and the default value will be a blank value.

2.9.4 Page Location

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

2.9.5 Security Updates

N/A – No Changes to Security

2.9.6 Page Mapping

Update page mapping for the Position Detail page.

2.9.7 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.10 Task Creation - Action Step Information Processing

1. Update Task Creation Processing to evaluate the Action Step Information panel for the Task Type/Sub-Type. Action Steps for Tasks will be determined by the Action Step Information panel based on if the Task has a Sub-Type or not. If the Task does not have a Sub-Type, Action Steps will only be determined from the Task Type Detail page. Similarly, if the Task does have a Sub-Type, Action Steps will only be determined from the Task Sub-Type Detail page. There will no hierarchical evaluation of Action Steps between the Task Type and Sub-Type.

Additionally, there will be no combination of Action Steps based on the Task Type and Sub-Type Action Step Information panels.

If Action Step Information is available, associate the Action Steps to the Task in the process of being created. Subsequent updates to the Action Step Information panel will not impact existing Tasks. Action Steps will be associated to a Task as of the time the Task is created based on the current configurations.

The following figure illustrates the behavior described:

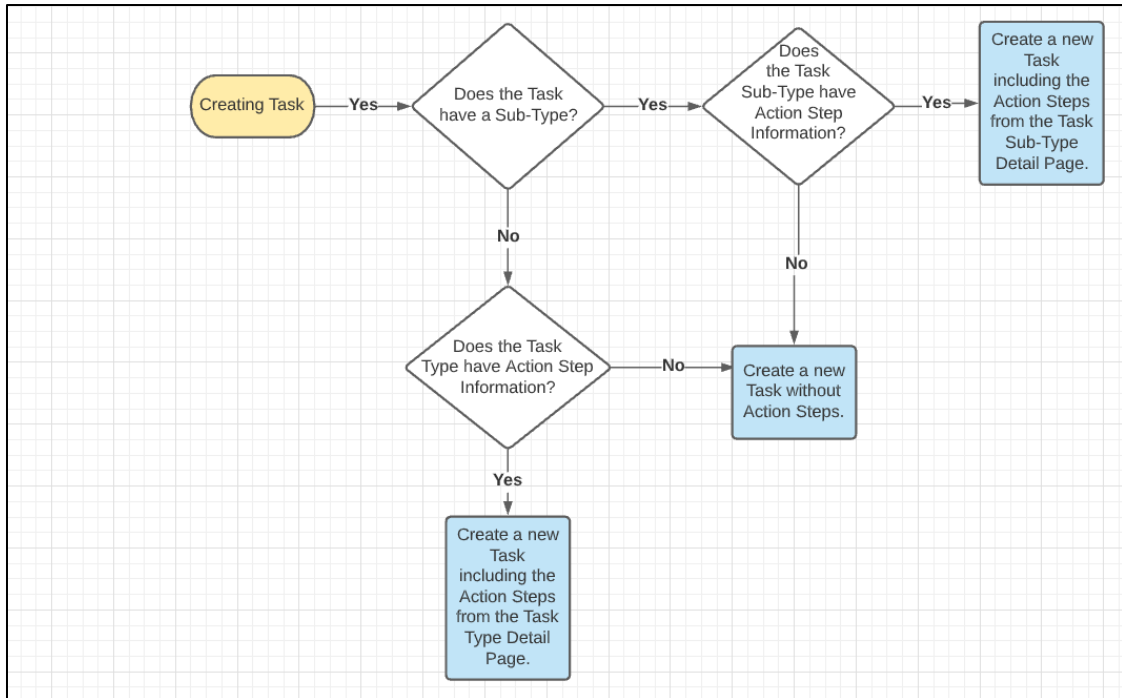


Figure 2.10.A: Action Step Information Processing Diagram

2.11 Task Completion - Resulting Task Information Processing

1. Implement logic to process Resulting Task Information during Task completion. A Task is considered complete when the Status is set to "Completed". Resulting Task Creation processing is as follows:
 - a. **Retrieve Resulting Task Information:** Based on the Task that is being Completed, evaluate the Task Type/Task Sub-Type page for the Task to confirm if Resulting Task Information has been configured. If there are contents for the Task Type/Task Sub-Type, proceed to the "Process Resulting Task Information" section. If there are no configurations within this panel, no further processing is required, and the Task will be Completed.

- b. **Process Resulting Task Information:** Based on the contents of the Resulting Task Information panel, attempt to create a Resulting Task as follows:
- i. Create a new Task respecting the configurations within the Resulting Task Information panel: i.e., Task Type, Due Date, Assignment, etc. (refer to Sections 2.1.3 and 2.2.3 for more information). If the Task Type/Sub-Type of the Task to be created contains configurations for both Append Information and Resulting Task Information, Append Information will not be evaluated/processed; the Resulting Task Information configuration takes precedence in this scenario.

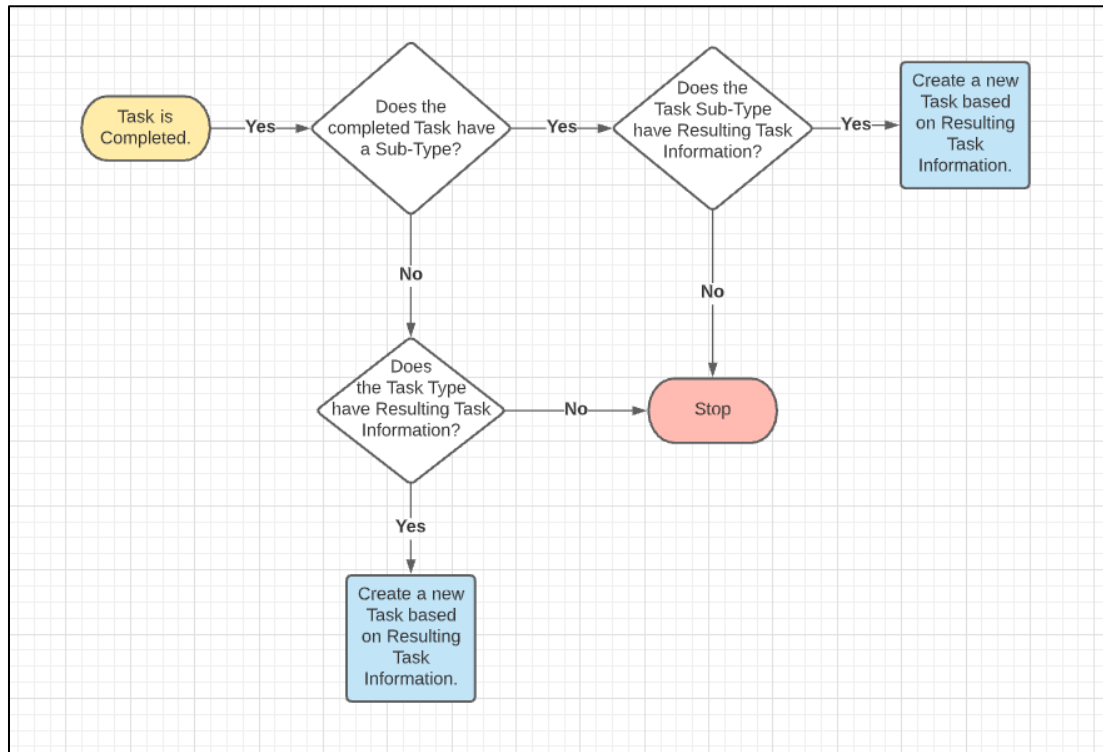


Figure 2.11.A: Resulting Task Information Processing Diagram

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2241	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.	This design makes updates to the CalSAWS pages to incorporate Task Action Step configurability.
2251	The CONTRACTOR shall update the Task Management solution to allow authorized users to configure a task type to generate a new task upon completion.	N/A.	This design makes updates to the CalSAWS pages to incorporate automated Resulting Task configurability.

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A