CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214923

DDID 2389

Task Re-Open

Task Management

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/19/2021	1.0	Initial Revision	Rakan Ali

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1   OVERVIEW

This design includes recommendations to update the CalSAWS System to allow Tasks to be Re-Opened after reaching an end state.

1.1   Current Design

The CalSAWS System allows workers to view, edit and work Tasks within the Task Pop-Up and Worklist pages. Once a task reaches an end state (Completed, Expired, or Void), the Task status cannot be changed.

1.2   Requests

Modify the CalSAWS System to allow Tasks that have reached a Completed, Expired or Void status to be re-opened.

1.3   Overview of Recommendations

1. Update the following pages to allow a Task to be re-opened:
   a. Worklist: Task Detail
   b. Worklist PR RE: Task Detail
   c. Task Pop-Up: Task Search
   d. Task Pop-Up: Task Detail

1.4   Assumptions

1. If a Task with an Expiration Type of "After Task Is Created" has been Expired; if the Task is re-opened, the worker will action the Task on the same day. In this scenario, the nightly Task expiration processes will re-expire the Task during the next run.
2. Task attributes other than the ones described in the recommendations below will not be modified when a Task is re-opened.
3. Counties will administer the appropriate security needed to re-open Tasks as necessary. This enhancement will not automatically associate this security to any Staff.
4. The Task Detail page accessible from the Worklist and Worklist PR / RE pages is the same page. They are not two separate Task Detail pages.
5. Tasks that have been removed by Task purge processes will not be available to be re-opened. The Task purge process removes tasks that have been Completed, Expired, or Void for 90 or more days.
6. Task reporting logic does not require modifications to notice the change in status from an end state (Expired, Complete, Void) to Assigned.

2 RECOMMENDATIONS

This section will outline recommendations to update the appropriate Task Management pages in the CalSAWS System to include Task re-open capabilities.

2.1 Worklist and Worklist PR / RE – Task Detail Page

2.1.1 Overview

The Task Detail page can be accessed for a Task via the Worklist and Worklist PR / RE pages in the CalSAWS System. This page displays Task attributes and allows workers to Complete a Task. Once a Task reaches an end state, this page is not editable. This section describes the recommendations to update the page to allow a Task to be re-opened.

2.1.2 Worklist and Worklist PR / RE – Task Detail Page Mockup

Task Detail

✱- Indicates required fields

Case Number: ✱ B20N752

| Re-Open | Close |

Category: Case Update	**Status:** Void	
Type: Pending Applicant IEVS Abstract		
Created Date: 12/23/2020	**Worker Assigned:** ✱ 19DP14147I	**Assigned Date:** 12/23/2020
Due Date: ✱ 01/22/2021	**Expiration Date:** 01/22/2021	
Long Description:		

▸ **Task History**

| Re-Open | Close |

Figure 2.1.2.1 – Worklist – Task Detail Page Mockup

2.1.3 Description of Changes

1. Update the Worklist and Worklist PR/RE Task Detail Page to include a "Re-Open" **BUTTON** that will display if the Task Status is Completed, Expired or Void and the logged in user's security profile contains the "TaskReOpen" security right.
2. On click of the "Re-Open" button, only the following attributes will be modified:
   a. The Task Status will be set to Assigned
   b. The Task History transaction will be logged to indicate the change in Status
   c. The Completed/Expiration/Void Date will be cleared out (Task History will previous the previous closure event)
   d. The Assign to Program Worker attribute will be re-evaluated and updated if necessary. The re-evaluation of the Assign to Program Worker attribute is necessary in the scenario where a Task may have been assigned to the Program Worker at the time of expiration/void/complete, but the program worker may have since changed.

      Assign to Program Worker Example: Suppose a Task is associated to a CalWORKs program and the CalWORKs worker is Bob Jones. This Task is also assigned to Bob Jones, so the Assign to Program Worker attribute is "Yes". Bob Jones completes the Task on 7/1/2021. One week later, the CalWORKs program is reassigned to Julie Smith. On 7/15/2021, the Task is Re-Opened and remains assigned to Bob Jones. Because Bob Jones is no longer the worker assigned to the CalWORKs program, the Assign to Program Worker attribute will be set to "No".

2.1.4 Page Validations

N/A

2.1.5 Page Location

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

Click on the "View" button of the desired result displayed in the Search Results Summary section.

2.1.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskReOpen	Task Detail; Task Search;	• Task Re-Open

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Re-Open	Access to re-open tasks.	N/A

2.1.7 Page Mapping

N/A – No updates to page mapping

2.1.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.2   Task Pop-Up - Task Search Page

2.2.1 Overview

The Task Pop-Up – Task Search page can be accessed via the "Tasks" link in the Utilities navigation menu. This page allows workers to search/view, edit and work Tasks. Once a Task reaches an end state, a Task cannot be edited via this page. This section describes the recommendations to update the page to allow a Task to be re-opened.

2.2.2 Task Pop-Up – Task Search Page Mockup

Figure 2.2.2.1 – Task Pop-Up – Task Search

Task Search

*- Indicates required fields
▶ Refine Your Search

Add Task

Search Results Summary   Results 1 - 5 of 5

		Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Worker ID	Bank ID	
	⚠H	01/22/2021	B20N752	Case Name	CF	Case Update	Pending Applicant IEVS Abstract	Void	19DP14147I		Re-Open
	⚠H	01/23/2021	B20N752	Case Name	CF	Case Update	Pending Applicant IEVS Abstract	Void	19DP14147I		Re-Open
	🔻L	04/07/2021	B20N752	Case Name		CMIPSII	Clearance CMIPSII	Completed	19DP80GN03	19DP8000AABK	Re-Open
	🅒	04/27/2021	B20N752	Case Name	CF	Application Registration	Intake	Completed	19DP805K06		Re-Open
	⚠H	05/27/2021	B20N752	Case Name	CF	Case Update	Pending Applicant IEVS Abstract	Completed	19DP141K2X		Re-Open

Add Task

2.2.3 Description of Changes

1. Update the Pop-Up Task Search page to include a "Re-Open" **BUTTON** that will display at the end of each row if the Task Status is Completed, Expired or Void and the logged in user's security profile contains the "TaskReOpen" security right.
2. On click of the "Re-Open" button, only the following attributes will be modified:
   a. The Task Status will be set to Assigned
   b. The Task History transaction will be logged to indicate the change in Status
   c. The Completed/Expiration/Void Date will be cleared out (Task History will previous the previous closure event)
   d. The Assign to Program Worker attribute will be re-evaluated and updated if necessary. The re-evaluation of the Assign to Program Worker attribute is necessary in the scenario where a Task may have been assigned to the Program Worker at the time of expiration/void/complete, but the program worker may have since changed.

Assign to Program Worker Example: Suppose a Task is associated to a CalWORKs program and the CalWORKs worker is Bob Jones. This Task is also assigned to Bob Jones, so the Assign to Program Worker attribute is "Yes". Bob Jones completes the Task on 7/1/2021. One week later, the CalWORKs program is reassigned to Julie Smith. On 7/15/2021, the Task is Re-Opened and remains assigned to Bob Jones. Because Bob Jones is no longer the worker assigned to the CalWORKs program, the Assign to Program Worker attribute will be set to "No".

2.2.4 Page Validations

N/A

2.2.5 Page Location

The Task Pop-Up window.

2.2.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskReOpen	Task Detail; Task Search;	• Task Re-Open

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Re-Open	Access to re-open tasks.	N/A

2.2.7 Page Mapping

N/A – No updates to page mapping

2.2.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.3   Task Pop-Up – Task Detail Page

2.3.1   Overview

The Task Pop-Up – Task Detail page can be accessed via the "Tasks" link in the Utilities navigation menu. This page allows workers to search/view, edit and work Tasks. Once a Task reaches an end state, a Task cannot be edited via this page. This section describes the recommendations to update the page to allow a Task to be re-opened.

2.3.2   Task Pop-Up – Task Detail Page Mockup

Figure 2.3.2.1 – Task Pop-Up – Task Detail Page Mockup

2.3.3   Description of Changes

1. Update the Task Detail Page to include a "Re-Open" **BUTTON** that will display if the Task Status is Completed, Expired or Void and the logged in user's security profile contains the "TaskReOpen" security right.
2. On click of the "Re-Open" button, only the following attributes will be modified:
   a. The Task Status will be set to Assigned
   b. The Task History transaction will be logged to indicate the change in Status
   c. The Completed/Expiration/Void Date will be cleared out (Task History will previous the previous closure event)

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d. The Assign to Program Worker attribute will be re-evaluated and updated if necessary. The re-evaluation of the Assign to Program Worker attribute is necessary in the scenario where a Task may have been assigned to the Program Worker at the time of expiration/void/complete, but the program worker may have since changed.

Assign to Program Worker Example: Suppose a Task is associated to a CalWORKs program and the CalWORKs worker is Bob Jones. This Task is also assigned to Bob Jones, so the Assign to Program Worker attribute is "Yes". Bob Jones completes the Task on 7/1/2021. One week later, the CalWORKs program is reassigned to Julie Smith. On 7/15/2021, the Task is Re-Opened and remains assigned to Bob Jones. Because Bob Jones is no longer the worker assigned to the CalWORKs program, the Assign to Program Worker attribute will be set to "No".

2.3.4 Page Validations
N/A

2.3.5 Page Location
The Task Pop-Up window.

2.3.6 Security Updates
1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskReOpen	Task Detail; Task Search;	• Task Re-Open

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Re-Open	Access to re-open tasks.	N/A

2.3.7 Page Mapping
N/A – No updates to page mapping

2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix	CA-214923 DDID 2389 Security Matrix.ɔ

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2389	The CONTRACTOR shall update the Task Management solution to allow authorized users to re-open a task that was previously completed, voided, or expired.	N/A	This design includes recommendations to allow a Task to be re-opened from a Status of completed, void or expired.

5 MIGRATION IMPACTS

N/A

6   OUTREACH

N/A

7 APPENDIX

N/A