CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214928

DDID 34

Unified Task Management

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mayuri Srinivas, Justin Dobbs, Jennifer Muna
	Reviewed By	Araceli Gallardo, Dymas Pena, Sarah Cox, Pandu Gupta, Carlos Albances, Aman Mishra

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/29/2020	1.0	Version 1	Mayuri Srinivas

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1 OVERVIEW

This design outlines modifications to Task Management functionality within the LRS/CalSAWS System to include core components that are available within the C-IV System to develop a unified Task Management solution. Future Task Management requirement designs will be based on the foundation established by this enhancement.

1.1 Current Design

The LRS/CalSAWS System contains a series of Worklist pages allowing county staff to view, manage and work tasks. The C-IV System includes additional functionalities for Task Management such as county-maintained Task Types/Sub Types, configuration of Automated Actions, reassignment functionality and Bank managed Tasks.

1.2 Requests

Develop a unified Task Management solution within the LRS/CalSAWS System that supports both the C-IV and LRS/CalSAWS tasking models. This enhancement will introduce several Task Management components that are currently available in the C-IV System. The Worklist pages within the LRS/CalSAWS System will remain available.

1.3 Overview of Recommendations

1. Add functionality to allow county customization of Task Types and Task Sub-Types
2. Add functionality to allow a level of county customization of automated task creation such as configurability of resulting Task Types, due date and assignment specifics.
3. Add functionality to allow county customization of Task Banks.
4. Convert LRS/CalSAWS System Master Assignment Queue positions and related Tasks to Banks.
5. Add functionality to allow additional customization of bulk Task reassignment configurations.
6. Modify the LRS/CalSAWS Worklist and Worklist PR RE Pages to evaluate for the county customizable Task Types and Task Banks.

1.4 Assumptions

1. The data model has been configured to support this design with CA-214927.
2. SCR CA-48393 will introduce the multi-select checkboxes to the Select Worker, Select Unit and Select Office pages and introduce a Select Bank page. These functions are required by the Task Reassignment Detail page.
3. Once Master Assignment Queue assigned Tasks are reassigned to Banks, the Task Management Dashboard pages will still display these Tasks assigned to an

"Unknown" worker until the Dashboard can be modified to support Banks with SCR CA-217304.

2   RECOMMENDATIONS

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

2.1   Task Statuses

2.1.1   Overview

Currently in LRS/CalSAWS, a Task can have one of the following statuses:

- Assigned
- Completed
- Expired

Much of the functionality being introduced with DDID 34 and DDID 655 are based on C-IV Task functionality which allows a Task to have one of the following statuses:

- Open
- In Process
- Cleared
- Expired
- Void

This section will outline recommendations to establish a consolidated set of Task statuses in LRS/CalSAWS. The additional recommendations within this design and within the DDID 655 design will make reference to this set of Task statuses.

2.1.2   Description of Changes

1. Introduce the following Task statuses to the LRS/CalSAWS System:

    a. In Process – Indicates if a Task is currently in process.

    b. Void – An optional status to indicate a void Task.

    The resulting set of Task statuses ongoing in LRS/CalSAWS is:

- Assigned
- In Process
- Completed
- Expired
- Void
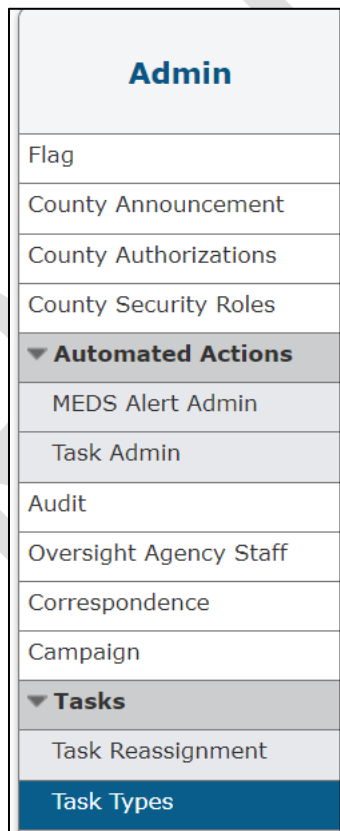
Note: Legacy C-IV System functionality served as reference for this design document. The use of the "Assigned" Task status serves the same purpose as the legacy "Open" status in the C-IV System. Similarly, the use of the "Completed" Task status serves the same purpose as the legacy "Cleared" Task status in the C-IV System.

2.2 Task Type List

2.2.1 Overview

Add a Task Type List page to the LRS/CalSAWS System. This page will display Task Types that have been defined by the county.

2.2.2 Task Type List Page Mockups

Figure 2.2.2.1 – Task Type List - Task Navigation

Figure 2.2.2.2 – Task Type List Mockup

2.2.3 Description of Change

Add a Task Type List page to the LRS/CalSAWS System accessible through a 'Task Types' link beneath the 'Tasks' option in the Task Navigation menu. Reference Section 2.2.5 for the full page navigation.

1. <u>Refine Your Search Section</u>

This is an expandable section toward the top of the page that displays parameters which can be used to filter the Tasks displayed on the page. It is expected to be collapsed on initial load.

a. **BUTTON:** Search –This button will refresh the information on the list page based on the search parameter values. If this button is clicked without filling in any parameters, all records are expected to display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

b. Name – A text field which will filter Task Type results if the Name of the Task Type includes the text within this field (upper/lower case does not matter).
Example: If an "ABD MC RE Packet" Task Type exists, searching with any of the following text strings in the Name field will return the "ABD MC RE Packet" Task Type in the results:
- "ABD"
- "MC RE"
- "mc re"
- "ABD MC RE Packet"

c. Category – A dropdown box which will filter Task Type results by Category. Options included in this dropdown are:
   i. Application Registration
   ii. Batch EDBC
   iii. CMIPSII
   iv. CSC
   v. CWS
   vi. CalHEERS
   vii. Case Update
   viii. Computation Request
   ix. EBT
   x. e-ICT
   xi. EDBC
   xii. External Recovery Account
   xiii. Foster Care RDB
   xiv. Fraud
   xv. IEVS
   xvi. IEVS Criminal
   xvii. IEVS Priority
   xviii. Interest Allocation
   xix. Invoice
   xx. Issuance Method
   xxi. Issuance Replacement/Reissue
   xxii. MC 355
   xxiii. MEDS Alert
   xxiv. MEDS Liaison

xxv. Manual

xxvi. Payment Request

xxvii. QR7LA

xxviii. Quality Assurance Assignment

xxix. Quality Review

xxx. Redetermination

xxxi. SAR7

xxxii. Screening Packet

xxxiii. Time Limits

xxxiv. Transaction Refund

xxxv. Valuable

xxxvi. YBN

xxxvii. YBN E-communications

d. Priority – A dropdown box which will filter Task Type results based on priority. Options included in this dropdown are:

i. Critical

ii. High

iii. Medium

iv. Low

e. Available Online – A dropdown box which will filter Task Type results based on the value of the Available Online attribute. Options included in this dropdown are:

i. Yes

ii. No

f. Available for Automation – A dropdown box which will filter Task Type results based on the value of the Available for Automation attribute. Options included in this dropdown are:

i. Yes

ii. No

2. <u>Search Results Summary Section</u>

This section will be displayed when there is at least one Task Type record found. The results will be paginated with 25 results per page. Initial load of the page will display all Task Types for the county. The expected order of the listing is by Name alphabetically. The 'Priority', 'Name', 'Category', 'Available Online', and 'Available for Automation' fields are sortable for the results.

a. **BUTTON:** Add Task Type – This button will navigate to the Task Type Detail page in create mode. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

b. Selectable checkbox – For each result displayed, a selectable checkbox may or may not display at the beginning of the row. If a checkbox displays, this means that the Task Type has not been associated to any Tasks and it can be removed via the "Remove" button.
Technical: Do not display the selectable checkbox if a Task Type is associated to a Category 399 Code Table entry (TASK_TYPE.TYPE_CODE). This is necessary so that a Task Type currently associated to an automated Task process for Los Angeles county that has not yet been converted to the Automated Action framework with DDID 1629 cannot be removed.

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

   i. - Critical

   ii. - High

   iii. - Medium

   iv. - Low

d. Name – This column will display the Name attribute of the Task Type. The Name will display as a hyperlink which will navigate to the Task Type Detail page in View mode for the Task Type if the worker's security profile contains the "TaskTypeDetailView" security right.

e. Category – This column will display the Category attribute of the Task Type.

f. Available Online – This column will display the Available Online attribute of the Task Type. This attribute controls whether a Task Type is selectable on the Task Detail page.

g. Available for Automation – This column will display the Available for Automation attribute of the Task Type. This attribute controls whether a Task Type is available for use during Automated Action scenarios that create Tasks.

h. **BUTTON**: Edit – This button will navigate to the Task Type Detail page in Edit mode for the Task Type. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

i. **BUTTON**: Remove – This button will remove any Task Types that have a checkmark in the selectable checkbox column. (See Selectable checkbox field above in 2b). This button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

2.2.4 Page Validation

1. "Remove – One of the selections for removal is currently configured in an Automated Action. Please select a different Task Type."

    a. Pressing the Remove button while selecting a Task Type that has been configured for an Automated Action will display a validation message.

2.2.5 Page Location

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

    The Task Navigation will display if the user profile contains the "TaskTypeListView" security right.

2.2.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskTypeListView	Task Type List;	• Task Type View • Task Type Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Type View	View Task Type List and Detail information.	• View Only
Task Type Edit	View Task Type List and Detail information. Edit and save Task Type information.	N/A

2.2.7 Page Mapping

Implement page mapping for the Task Type Detail page.

2.2.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.3 Task Type Detail

2.3.1 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.

2.3.2 Task Type Detail Mockups

Figure 2.3.2.1 – Task Type Detail - Task Navigation

Task Type Detail

Save and Return   Cancel

Task Type Information

Name: ✱
ABD MC RE Packet

Category: ✱
[⌄]

Priority:
[High ⌄]

Available Online:
☐

Available for Automation:
☑

Instructions:
[   ]

Expire Tasks: ✱
[Yes ⌄]

Expiration Period: ✱
[90] day(s)

Expiration Type: ✱
[After Program Closes ⌄]

Newly Assigned Indicator: ✱
Tasks display indicator for [5] day(s)

▾ Sub-Type Information

Name	Available Online	Available for Automation	Priority	Task Expiration	
January	Yes	No	High		Edit
February	Yes	No	High		Edit
March	Yes	No	High		Edit
December	Yes	No	High		Edit

Add

Save and Return   Cancel

Figure 2.3.2.2 – Task Type Detail – Edit Mode

Task Type Detail

[Edit] [Close]

Task Type Information

Name: *
ABD MC RE Packet

Category: *
Application Registration

Priority:
High

Available Online:
Yes

Available for Automation:
No

Instructions:

Expire Tasks: *
Yes

Expiration Period: *
90 day(s)

Expiration Type: *
After Program Closes

Newly Assigned Indicator: *

Tasks display indicator for 5 day(s)

▾ Sub-Type Information

Name	Available Online	Available for Automation	Priority	Task Expiration
January	Yes	No	High	
February	Yes	No	High	
March	Yes	No	High	
April	Yes	No	High	
May	Yes	No	High	
June	Yes	No	High	
July	Yes	No	High	
August	Yes	No	High	
September	Yes	No	High	
October	Yes	No	High	
November	Yes	No	High	
December	Yes	No	High	

[Edit] [Close]

Figure 2.3.2.3 – Task Type Detail – View Mode

Figure 2.3.2.4 – Task Type Detail – Edit Mode Sub-Type Buttons

Figure 2.3.2.5 – Task Type Detail – Create Mode

2.3.3 Description of Changes

Add a Task Type Detail page to the LRS/CalSAWS System.

1. **BUTTON**: Edit - This button displays when the page is in view mode and will navigate to the Task Type Detail page in edit mode. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

2. **BUTTON**: Close - This button displays when the page is in view mode and will navigate to the Task Type List page.

3. **BUTTON**: Save and Return - This button displays when the page is in create or edit mode. The button will save page changes and navigate to the Task Type List page. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

4. **BUTTON**: Cancel - This button displays when the page is in create or edit mode. The button will discard page changes and navigate to the Task Type List page.

5. Task Type Information Section

    This is the upper section of the page that displays various Task Type attributes.
    a. Name **(Required)** – A text field that allows a user to specify the name of the Task Type. The maximum length for this field is 50 characters.

    b. Category **(Required)** – A dropdown menu that contains options for Task Type Category. Values included in the dropdown will display in the following order:
        i. Application Registration
        ii. Batch EDBC
        iii. CMIPSII
        iv. CSC
        v. CWS
        vi. CalHEERS
        vii. Case Update
        viii. Computation Request
        ix. EBT
        x. e-ICT
        xi. EDBC
        xii. External Recovery Account
        xiii. Foster Care RDB
        xiv. Fraud
        xv. IEVS
        xvi. IEVS Criminal
        xvii. IEVS Priority
        xviii. Interest Allocation
        xix. Invoice

xx. Issuance Method

xxi. Issuance Replacement/Reissue

xxii. MC 355

xxiii. MEDS Alert

xxiv. MEDS Liaison

xxv. Manual

xxvi. Payment Request

xxvii. QR7LA

xxviii. Quality Assurance Assignment

xxix. Quality Review

xxx. Redetermination

xxxi. SAR7

xxxii. Screening Packet

xxxiii. Time Limits

xxxiv. Transaction Refund

xxxv. Valuable

xxxvi. YBN

xxxvii. YBN E-communications

c. Priority – A dropdown menu that contains options for Task Type priority. Values included in the dropdown will display in the following order:

   i. Critical

   ii. High

   iii. Medium

   iv. Low

This field will default initially to "Medium" unless it is modified by the user who is creating the Task Type.

d. Available Online – A checkbox field that will indicate if the Task Type will be selectable on the Task Detail page.

e. Available for Automation – A checkbox field that will indicate if the Task Type will be available for Automated Action scenarios that create Tasks.

f. Instructions – A text field that allows a user to input up to 2000 characters of information to serve as instructions for the particular Task Type.

g. Expire Tasks **(Required)** – A dropdown menu that is editable when the Task Type Detail page is in create or edit mode. The dropdown menu will display the following values:

   i. Yes

   ii. No

h. Expiration Period **(Required)** – Displays if the value of the Expire Tasks field is Yes. This field will display as plain text when the Task Type Detail page is in view mode. When the page is in create or edit mode, this field allows a user to input the numeric value between 1-999 to complete the following statement:

"# day(s)"

i. Expiration Type **(Required)** – Displays if the value of the Expire Tasks field is Yes. This field will display as plain text when the Task Type Detail page is in view mode. When the page is in create or edit mode, this field is a dropdown menu containing the following values:
    i. After Program Closes
    ii. After Task Is Created

j. Newly Assigned Indicator **(Required)** – Allows a user to input the numeric value to complete the following statement:

"Tasks display indicator for # day(s)"

The number of days value controls how long a Task of this Task Type will display the exclamation point icon.
Example: if the value is set as 10 days, a Task that is assigned to a Worker on January 3rd will display an exclamation point on the Task Search page (reference CA-214929 for Task Search page specifics) through January 13th. On January 14th, the exclamation point will no longer display.

This field is limited to numbers from 1-999 and it will default to a value of 5.

6. Sub-Type Information Section
    This is an expandable section on the Task Type page that displays the following information for one or more Task Sub Types:
    a. Selectable checkbox – For each result displayed, a selectable checkbox may or may not display at the beginning of the row. If a checkbox displays, this means that the Task Sub-Type has not been associated to any Tasks and it can be removed via the "Remove" button.

    b. Name – This column will display the Sub-Type Name attribute of the Task Sub-Type. The Name will display as a hyperlink which will navigate to the Task Sub-Type Detail page in View mode for the Task Sub-Type.

c. Available Online - This column will display the Available Online attribute of the Task Sub-Type. This attribute controls whether a Task Sub-Type is selectable on the Task Detail page.

d. Available for Automation – This column will display the Available for Automation attribute of the Task Sub-Type. This attribute controls whether a Task Sub-Type is available for use during Automated Action scenarios that create Tasks.

e. Priority – This column will display the Priority attribute of the Task Sub-Type.

f. Task Expiration – This column will display the Expire Tasks attribute of the Task Sub-Type.

g. **BUTTON**: Edit – This button will navigate to the Task Sub-Type Detail page in edit mode. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

h. **BUTTON:** Remove – This button will remove any Task Sub-Types that have a checkmark in the selectable checkbox column. (See Selectable checkbox field above in 2a). The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

i. **BUTTON**: Add – This button will navigate to the Task Sub-Type Detail page in create mode. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

2.3.4 Page Validation

1. "Remove – One of the selections for removal is currently in use for Automated Actions. Please select a Task Sub-Type that is not in use."
   a. Pressing the Remove button while selecting a Task Sub-Type that is in use for an Automated Action will display a validation message.

2. "Name – A Task Type with this name already exists."
   a. Creating a Task Type with the same name as another Task Type within the county will display a validation message. The Name comparison is not case sensitive.

3. "Available for Automation – A Task Type or Task Sub-Type you have made unavailable for automation is already in use by automation. Please update the Automated Action."

a. Updating a Task Type or Task Sub-Type to be unavailable for automation, while the Task Type or Task Sub-Type is selected for an Automated Action will display a validation message.

4. "Newly Assigned Indicator - Value must be a number from 1 – 999. Please enter a different value."
   a. When the User attempts to save a value other than a number from 1 – 999 in the Newly Assigned Indicator field, a validation message is triggered.

5. "Expiration Period – Value must be a number from 1 - 999. Please enter a different value."

2.3.5 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.

2.3.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskTypeDetailView	Task Type Detail;	• Task Type View • Task Type Edit
TaskTypeDetailEdit	Task Type Detail;	• Task Type Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Type View	View Task Type List and Detail information	• View Only

Security Group	Group Description	Group to Role Mapping
Task Type Edit	View Task Type List and Detail information. Edit and save Task Type information.	N/A

2.3.7 Page Mapping

Implement page mapping for the Task Type Detail page.

2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.4 Task Sub-Type Detail

2.4.1 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.

2.4.2 Task Sub-Type Detail Mockups

Figure 2.4.2.1 – Task Sub-Type Detail - Task Navigation

Figure 2.4.2.2 – Sub-Type Information Section on the Task Type Detail page

Task Sub-Type Detail

Edit   Close

Task Sub-Type Information

Task Type:
Age Change

Sub-Type Name: *
Example Name

Available Online:
Yes

Available for Automation:
No

Priority:
Low

Expire Tasks:
Yes

Expiration Period: *
5 day(s)

Expiration Type: *
After Task Is Created

Edit   Close

Figure 2.4.2.3 – Task Sub-Type Detail – View Mode

Task Sub-Type Detail

Save and Return   Cancel

Task Sub-Type Information

Task Type:
Age Change

Sub-Type Name: *

Available Online:
☐

Available for Automation:
☐

Priority:
▾

Expire Tasks:
Yes ▾

Expiration Period: *
⬚ day(s)

Expiration Type: *
- Select - ▾

Save and Return   Cancel

Figure 2.4.2.4 – Task Sub-Type Detail – Edit Mode

2.4.3 Description of Changes

Add a Task Sub-Type Detail page to the LRS/CalSAWS System.

The Name hyperlink, Edit and Add buttons in the Sub-Type Information section of the Task Type Detail page as displayed in figure 2.4.2.2 above will navigate to the Task Sub-Type Detail page.

1. **BUTTON**: Edit – This button will display when the Task Sub-Type Detail page is in view mode and will refresh the page into edit mode. The button will display if the worker's security profile contains the "TaskTypeDetailEdit" security right.

2. **BUTTON**: Close – This button will display when the Task Sub-Type Detail page is in view mode and it will navigate to the Task Type Detail page.

3. **BUTTON:** Save and Return – This button will display when the Task Sub-Type Detail page is in create or edit mode. The button will save page changes and navigate to the Task Type Detail page.

4. **BUTTON**: Cancel – This button will display when the Task Sub-Type Detail page is in create or edit mode. The button will discard page changes and navigate to the Task Type Detail page.

5. Task Type – The name of the Task Type that the Task Sub-Type applies to.

6. Sub-Type Name **(Required)** – A text field that allows a user to specify the name of the Task Sub-Type. The maximum length for this field is 50 characters.

7. Available Online – A checkbox field that will indicate if the Task Sub-Type will be selectable on the Task Detail page.

8. Available for Automation – A checkbox field that will indicate if the Task Sub-Type will be available for Automated Action scenarios that create Tasks.

9. Priority – A dropdown menu that contains options for Task Sub-Type priority. Values included in the dropdown will display in the following order:
   a. Critical
   b. High
   c. Medium
   d. Low
   If a Sub-Type is not assigned a priority (by selecting <blank>), it will be considered as having the same Priority as its parent Task Type.

10. Expire Tasks – A dropdown menu that is editable when the Task Sub-Type Detail page is in create or edit mode. The dropdown menu will display the following values:
    a. Yes
    b. No

11. Expiration Period **(Required)** - Displays if the value of the Expire Tasks field is Yes. This field will display as plain text when the Task Sub-Type Detail page is in view mode. When the page is in create or edit mode, this field allows a user to input the numeric value to complete the following statement:

"# day(s)"

12. Expiration Type **(Required)** - Displays if the value of the Expire Tasks field is Yes. This field will display as plain text when the Task Sub-Type Detail page is in view mode. When the page is in create or edit mode, this field is a dropdown menu containing the following values:
    a. After Program Closes
    b. After Task Is Created

2.4.4 Page Validation

1. "Name – A Sub-Type with this name already exists."
    a. Creating duplicate Sub-Types for a single Task Type will display a validation message.

2. "The Sub-Type is already in use by Automation. Please update the Automated Action."
    a. When a User attempts to select a Sub-Type already in use by Automation, a validation message is triggered.

3. "Expiration Period – Value must be a number from 1 - 999. Please enter a different value."

2.4.5 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 as displayed in figure 2.4.2 above will navigate to the Task Sub-Type Detail page.

2.4.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskTypeDetailView	Task Type Detail;	• Task Type View • Task Type Edit
TaskTypeDetailEdit	Task Type Detail;	• Task Type Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Type View	View Task Type List and Detail information	• View Only
Task Type Edit	View Task Type List and Detail information. Edit and save Task Type information.	N/A

2.4.7 Page Mapping

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

2.4.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.5 Automated Action List

2.5.1 Overview

The Automated Action List page will display the Automated Actions that are available in the LRS/CalSAWS System. Users can navigate to detailed information for each Automated Action from this page. Add 'Task Admin' tab to Task Navigation.

2.5.2 Automated Action List Page Mockup

Figure 2.5.2.1 – Automated Action List Task Navigation

Figure 2.5.2.2 – Automated Action List Page Mockup

2.5.3 Description of Changes

Add an Automated Action List page to the LRS/CalSAWS System.

1. Refine Your Search Section

   This is an expandable section toward the top of the page that can be used to filter the Automated Actions displayed on the page. It is expected to be collapsed on initial load. The expected order of the listing is by Name alphabetically. The 'Name', 'Program(s)', 'Type', 'Source', and 'Status' fields are sortable for the results.

   a. **BUTTON**: Search –This button will refresh the information on the list page based on the search parameter values. If this button is clicked without filling in any parameters, all records are expected to display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

   b. Name – A text field which will filter Automated Action results if the Name of the Automated Action includes the text within this field (upper/lower case does not matter).

c. Status – a dropdown that indicates the status of the Automated Action. Options included are:
   i. Active
   ii. Inactive
   iii. Unavailable

d. Program – a dropdown that will filter Automated Action results if by a specific program.

e. Type – a dropdown that will filter Automated Action results by Automated Action type. Options included are:
   i. Create Task
   ii. Text Outreach
   iii. Clear Task

f. Source – a dropdown that will filter Automated Action results by Automated Action source. Options included are:
   i. Batch
   ii. Online

2. <u>Search Results Summary Section</u>
   This section will be displayed when there is at least one Automated Action record found. The results will be paginated within 25 results per page. Initial load of the page will display all Automated Actions for the county.
   a. Name – This column will display the Name attribute of the Automated Action.

   b. Program(s) – This column will display the Program(s) attribute of the Automated Action.

   c. Type – This column displays the Type of the Automated Action.

   d. Source – This column displays the Source of the Automated Action.

   e. Status – This column displays the Status of the Automated Action.

   f. **BUTTON**: Edit – This button will navigate the User to the Automated Action Detail page in Edit mode for the Automated Action. The button will display if the worker's security profile contains the "AutomatedActionsDetailEdit" security right.

2.5.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin

    The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

2.5.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
AutomatedActionsListView	Automated Action List;	• Automated Actions View • Automated Actions Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Automated Actions View	View Automated Actions list and Detail information.	• View Only
Automated Actions Edit	View Automated Actions list and Detail information. Edit and save Automated Actions Detail information.	N/A

2.5.6 Page Mapping

Implement page mapping for the Automated Action List page.

2.5.7 Page Usage/Data Volume Impacts
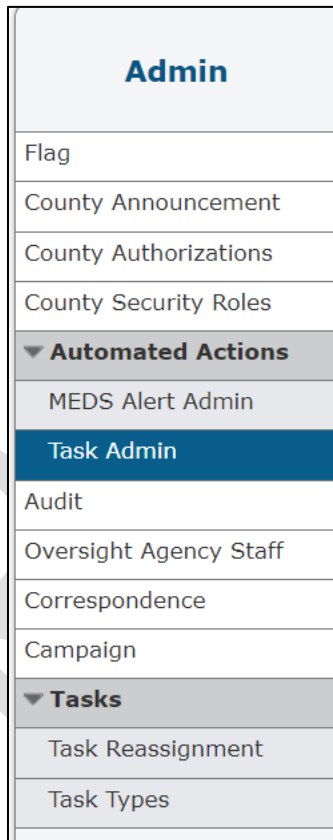
There are no expected page usage/volume impacts.

2.6 Automated Action Detail

2.6.1 Overview

The Automated Action Detail page is accessible from the Automated Action List page. This page allows the User to capture and display detailed information about the Automated Action. Add 'Task Admin' tab to Task Navigation.

2.6.2 Automated Action Detail Mockup

Admin

Flag
County Announcement
County Authorizations
County Security Roles
▼ **Automated Actions**
MEDS Alert Admin
Task Admin
Audit
Oversight Agency Staff
Correspondence
Campaign
▼ **Tasks**
Task Reassignment
Task Types

Figure 2.6.2.1 – Automated Action Detail Task Navigation

Figure 2.6.2.2 – Automated Action Detail Edit Mode Mockup

Figure 2.6.2.3 – Automated Action Detail View Mode Mockup

2.6.3 Description of Changes

Add an Automated Action Detail page to the LRS/CalSAWS System.

1. **BUTTON:** Edit – This button will display if the page is in View mode and the Automated Action does not have a status of Unavailable. Clicking this button displays the Automated Action Detail page in Edit mode. The button will display if the worker's security profile contains the "AutomatedActionsDetailEdit" security right.

2. **BUTTON:** Close – This button will display if the page is in View mode. Clicking this button returns to the Automated Action List page.

3. **BUTTON:** Save and Return – This button will display if the page is in Edit mode. Clicking this button will save page changes and return to the Automated Action List page.

4. **BUTTON:** Cancel – This button will display if the page is in Edit mode. Clicking this button discards page changes and returns to the Automated Action List page.

5. Action Information Section

   This is the upper section of the page that displays various Automated Action attributes.

   a. Name – a text field that allows a user to specify the name of an Automated Action. The maximum length for this field is 50 characters.

   b. Type – indicates the Type of the Automated Action.

   c. Status **(required)** – a dropdown that indicates the status of the Automated Action. Options included are:
      i. Active: the Automated Action is configured to execute the type of action listed.
      ii. Inactive: the Automated Action will not execute the type of action listed.
      iii. Unavailable: the Automated Action is no longer available for assignment and has been decommissioned in the automated system for all counties. This status value is not available for selection on this page.

   d. Program(s) – section that lists the program(s) that apply to each Automated Action.

   e. Run Date – indicates the day(s) the Automated Action is taken. If the Automated Action is caused by an online action, the run date will display "Real Time".

f. Source – indicates the source that executes the Automated Action.

g. Scenario – indicates the Scenario under which the Automated Action will be taken.

6. <u>Task Information Section</u>

This is the lower section of the page that displays attributes related to the Task. This section will display if the Automated Action type is Create Task.

a. Task Type **(required)** – a dropdown that indicates the Task Type that is used for creating a task.

b. Task Sub-Type – a dropdown that indicates the Task Sub-Type that is used for creating a task.

c. Due Date – a dropdown that indicates the rule that will be used to set the due date for a Task created by the Automated Action. Options included are:
   i. Default Due Date – Will set the due date based on the logic that was determined when the Automated Action was implemented.
   ii. 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.
   iii. 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.
   iv. Last Day of Month – Will set the due date to the last day of the month of the System date.
   v. Last Day of Following Month - Will set the due date to the last day of the month following the month of the System date.

d. Due Date Details – A dynamic field that will display differently based on the selection to the Due Date field. Options for display are:

Due Date Value	Due Date Details Will Display
Default Due Date	Text based on the code value that describes the logic implemented in the Automated Action for setting the due date.
After Number of Calendar Days	A required "Number of Calendar Days" field will display. The input value must be a number from 0 – 999.

Due Date Value	Due Date Details Will Display
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. Initial Assignment – a dropdown field that allows the User to choose how Tasks generated by the Automated Action are assigned. Options included are:
   i. Default Assignment – This option is the default value
   ii. Program Worker/Bank
   iii. Office Distribution – This option employs the Office Distribution assignment functionality currently available in the LRS/CalSAWS System. The Office Distribution functionality will attempt to assign a 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. Default Assignment – a field that displays when the Initial Assignment Field value is "Default Assignment". This field describes the default manner by which the LRS/CalSAWS System assigns Tasks generated by the Automated Action.

g. Long Description – indicates the long description that will be used when creating a task.

2.6.4 Page Validation

1. "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, a validation message is triggered.

2. "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, a validation message is triggered.

3. "Default Bank ID – Bank ID does not exist."
   a. Add a validation to display when the User attempts to save the Automated Action with the Bank ID field populated with an ID that does not correspond to an existing Bank in the LRS/CalSAWS System.

4. "Program Worker – Tasks must be assigned to a Position or a Bank."
   a. Add a validation to display when the User attempts to save the Automated Action with "No Program Worker" selected in the Program Worker field, and no Bank ID populated in the Bank ID field.

2.6.5 Page Location

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin

  Click on a hyperlink of the desired result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.

  The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

2.6.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
AutomatedActionsDetailView	Automated Action Detail;	• Automated Actions View • Automated Actions Edit
AutomatedActionsDetailEdit	Automated Action Detail;	• Automated Actions Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Automated Actions View	View Automated Actions list and Detail information.	• View Only
Automated Actions Edit	View Automated Actions list and Detail information. Edit and save Automated Actions Detail information.	N/A

2.6.7 Page Mapping

Implement page mapping for the Automated Action Detail page.

2.6.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.7 Bank Search Page

2.7.1 Overview

A Task Bank allows Tasks to be assigned to a shared repository that Workers can pull from. A possible use for Task Banks is that SAR7 Tasks could be assigned to a Bank and the members of the county who work SAR7 Tasks could pull their work from that Task Bank.

The Bank Search page allows the User to search for Task Banks that have been created for a specified Office and Unit within the LRS/CalSAWS System.

Add 'Bank' tab to Task Navigation.

2.7.2 Bank Search Page Mockup

Figure 2.7.2.1 – Bank Search Page Task Navigation

Figure 2.7.2.2 – Bank Search Page Mockup

2.7.3 Description of Changes

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

1. **BUTTON**: Search – When clicked, the Search Results Summary is refreshed to display Banks that match the search criteria in the Search Parameters section. If this button is clicked without filling in any parameters, all records are expected to display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

2. Search Parameters

   The following parameters display toward the top of the page and allow users to filter the Banks that are displayed on the page:

   a. Bank ID – A text field which will filter Bank results if the Bank ID includes the text within this field.

   b. Bank Name – A text field which will filter Bank results if the Bank Name includes text within this field. This field will auto complete as Users begin to type.

   c. Unit ID – A text field allowing users to search for Banks within a specific Unit.

   d. Office Name – On initial load of the page, this field will be populated with the name of the logged in User's Office.

3. Search Results Summary:

   This table contains one row for each Bank matching the values of the search criteria in the Search Parameters section.

   On first page load, the Search Results Summary will display the Banks belonging to the logged in User's office.

   The Table displays "No Data Found" if no Banks match the search criteria. The expected order of the listing is by Bank ID alphabetically/numerically. The 'Bank ID', 'Bank Name', 'Unit ID', and 'Office Name' fields are sortable for the results.

   BUTTON: Add Bank – This button will display within the Search Results Summary section and will navigate to the Bank Detail page in create mode. The button will display if the worker's security profile contains the "BankDetailEdit" security right.

   The results table consists of the following sortable columns:

   a. Bank ID - This column will display the associated ID for the Bank. The value will display as a hyperlink that will navigate to the

Bank Detail page if the worker's security profile contains the "BankDetailView" security right.

      i. The Bank ID itself is composed of the County Code, Division Code, Office Number, Unit Number, Bank Number, and followed by the letters 'BK' (to denote a bank).

      ii. The Bank Number Element of the Bank ID is derived by finding the highest existing Bank Number or Position Number in the Bank's unit and then incrementing that value by one. This is done so the first ten characters of the Bank ID and Worker ID are unique and do not collide with each other.

      iii. Update Position creation logic to also consider existing Bank Numbers in the Position's unit when generating the POS_NUM_IDENTIF element for new positions.

b. Bank Name - This column will display the name that a User has assigned to the Bank.

c. Unit ID - This column will display the ID of the Unit that the Bank was created for.

d. Office Name - This column will display the name of the Office the Bank was created for.

e. **BUTTON**: Edit – This button will display for each Bank if the worker's security profile contains the "BankDetailEdit" security right. The button will navigate to the Bank Detail page in Edit mode for the Bank.

2.7.4 Page Location

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

The Task Navigation will display if the user profile contains the "BankSearchView" security right.

2.7.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
BankSearchView	Bank Search;	• Bank View • Bank Edit
BankDetailView	Bank Detail;	• Bank View • Bank Edit • My Bank View
BankDetailEdit	Bank Detail;	• Bank Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Bank View	Search for and View Bank details.	• View Only
Bank Edit	View and Edit Bank details.	N/A
My Bank View	View Bank details.	• View Only

2.7.6 Page Mapping

Implement page mapping for the Bank Search page.

2.7.7 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.8 Bank Detail Page

2.8.1 Overview

The Bank Detail page allows users to view, create and manage Banks within the LRS/CalSAWS System. Add 'Bank' tab to Task Navigation.

2.8.2 Bank Detail Page Mockup

Figure 2.8.2.1 – Bank Detail Page Task Navigation

Bank Detail

[Edit] [Close]

General Bank Information

Bank ID:
36LS01EH0FBK

Bank Name: ✱
Justins Stuff

Office Name: ✱
SB TAD 01/WTW/Child Care/PID

Unit ID: ✱
EH00

Associate All Positions In Unit and Office: ✱
Yes

▶ Task Categories

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

▶ Additional Associations

Level	Number	Name
Office	02	SB TAD 02/WTW/Child Care/PID

▶ Excluded Associations

Level	Number	Name
Worker	36SS9105B1	Almite, Omega

[Edit] [Close]

Figure 2.8.2.2 – Bank Detail Page View Mode Mockup

Bank Detail

✱ - Indicates required fields
[Save] [Cancel]

General Bank Information

Bank ID:

Bank Name: ✱

[   ]

Office Name: ✱
[Select]

Unit ID: ✱
[Select]

Associate All Positions In Unit and Office: ✱
[- Select - ▾]

▾ Task Categories

☐ Application (All)
    ☐ Application Registration
☐ CMIPSII
☐ CalHEERS
☐ YBN
☐ e-ICT

☐ Case Update
☐ Foster Care RDB
☐ IEVS
☐ IEVS Priority
☐ MEDS Alert
☐ QR7LA
☐ Redetermination
☐ Screening Packet

☐ EBT
☐ Fraud
☐ IEVS Criminal
☐ MC 355
☐ MEDS Liaison
☐ Quality Assurance Assignment
☐ SAR7
☐ YBN E-communications

▸ Additional Associations

Level	Number	Name

[Add]

▾ Excluded Associations

Level	Number	Name

[Add]

[Save] [Cancel]

Figure 2.8.2.3 – Bank Detail Page Create Mode Mockup

Bank Detail

*- Indicates required fields

[Save] [Cancel]

General Bank Information

Bank ID:
12AS01JC0MBK

Bank Name: *
[WTW 01]

Office Name: *
Humboldt Department of Health and Human
Services Social Services Branch

Unit ID: *
JC00

Associate All Positions In Unit and Office: *
[Yes ▾]

▾ Task Categories

☐ Application (All)
    ☐ Application Registration
    ☐ CMIPSII
    ☐ CalHEERS
    ☐ YBN
    ☐ e-ICT

☐ Case Update
☐ Foster Care RDB
☐ IEVS
☐ IEVS Priority
☐ MEDS Alert
☐ QR7LA
☐ Redetermination
☐ Screening Packet

☐ EBT
☐ Fraud
☐ IEVS Criminal
☐ MC 355
☐ MEDS Liaison
☐ Quality Assurance Assignment
☐ SAR7
☐ YBN E-communications

▾ Additional Associations

☐	Level	Number	Name
☐	Unit	JD00	JD Unit WTW
☐	Unit	JE00	JE Unit WTW
☐	Unit	JF00	JF Unit WTW
☐	Worker	12AS01ISDK	Srinivas, Mayuri

[Remove]   [Add]

▾ Excluded Associations

Level	Number	Name

[Add]

[Save] [Cancel]

Figure 2.8.2.4 – Bank Detail Page Edit Mode Mockup

2.8.3 Description of Changes

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

1. **BUTTON:** Edit – This button will display when the page is in view mode and will refresh the page into edit mode. The button will display if the worker's security profile contains the "BankDetailEdit" security right.

2. **BUTTON:** Close – This button will display when the page is in view mode and will navigate to the Bank Search page containing the results of the previously executed search results.

3. **BUTTON:** Save – This button will display if the Bank Detail page is in Create or Edit mode. Clicking this button saves the newly created bank or any changes made to the bank's configuration and refreshes the page into view mode. The button will display if the worker's security profile contains the "BankDetailEdit" security right.

4. **BUTTON:** Cancel – This button will display if the Bank Detail page is in Create or Edit mode. Clicking this button discards the information captured on the page and navigates the User to the Bank Search page where the previously executed search results, if any, are displayed. This button will display if the user's security profile contains the "BankSearchView" security right.

5. General Bank Information:
   This section contains general information and preferences set for the Bank.

   a. Bank ID -- This is the ID for this Bank; this field is always empty in Add mode.

   b. Bank Name **(Required)** -- This is the name that was given to this Bank; the maximum character limit is 200. This field is editable in both Create mode and Edit mode of the page.

   c. Office Name **(Required)** -- The name of the Office this Bank was created for followed by the Select button. When clicked, the button loads the Select Office page. This field is only editable when the page is in Create mode; it is not editable when the page is in View or Edit mode.

   d. Unit ID **(Required)** -- This is the ID of the Unit this Bank was created for followed by the Select button. When clicked, the button loads the Select Unit page. This field is only editable when the page is in Create mode; it is not editable when the page is in View or Edit mode.

   e. Associate All positions In Unit and Office **(Required)** -- Displays (Yes/No) whether all of the Workers in the Bank's Unit-Office combination are implicitly associated to the bank. This field is editable when the page is in Create or Edit mode.

6. Task Categories

This collapsible section provides a list of Task Categories that can be assigned to a Bank.

  a. Selectable Checkbox – For each Task Category displayed in this section, a selectable checkbox will display when the page is in Add or Edit mode. The user may select one or more Task Categories to associate to a Bank. The selection(s) will have a check mark in View Mode.

  a. The following Task Categories will be available for selection:
     i. Application (All)
     ii. Application Registration – Auto selected when "Application (All)" is selected
     iii. CalHEERS – Auto selected when "Application (All)" is selected
     iv. Case Update – Auto selected when "Application (All)" is selected
     v. CMIPSII – Auto selected when "Application (All)" is selected
     vi. EBT – Auto selected when "Application (All)" is selected
     vii. e-ICT – Auto selected when "Application (All)" is selected
     viii. Foster Care RDB
     ix. Fraud
     x. IEVS
     xi. IEVS Criminal
     xii. IEVS Priority
     xiii. MC 355
     xiv. MEDS Alert
     xv. MEDS Liaison
     xvi. QR7LA
     xvii. Quality Assurance Assignment
     xviii. Redetermination
     xix. SAR7
     xx. Screening Packet
     xxi. YBN
     xxii. YBN E-communications

7. <u>Additional Associations</u>

This section contains a row for each Worker, Unit, or Office that has been explicitly associated to the Bank. This section also allows the user to add and/or remove Worker, Unit or Office associations to the Bank. If this section contains no rows, it appears collapsed upon page load.

  a. Selectable Checkbox –For each result displayed in this section, a selectable checkbox will display when the page is in Create or Edit mode.

b. Level - This column indicates whether the row represents an individual Worker, a Unit, or an Office.

c. Number - This column indicates the number of the Worker, Unit, or Office.

d. Name - This column indicates the Name of the Worker, Unit, or Office.

e. **BUTTON**: Remove – Displays when the page is in create or edit mode and there exists at least one row in this section. Clicking this button removes any rows with a checkmark in the selectable checkbox.

f. **BUTTON**: Add – Displays when the page is in create or edit mode. Clicking this button adds an additional row to the table above this button. In the Level column of that row appears a select input containing the values "-Select-," "Office," "Unit," and "Worker" in that order. When one of the three organizational values are selected, the Select button appears in the name column of the row. Clicking it will load the Select Office, Select Unit, or Select Worker multi-select page depending on which value was chosen for level.

8. Excluded Associations

This section contains a row for each Worker, Unit, or Office that has been explicitly excluded from the Bank. This section also allows the user to add and/or remove Worker, Unit or Office exclusions for the Bank. If this section contains no rows, it appears collapsed upon page load.

a. Selectable Checkbox –For each result displayed in this section, a selectable checkbox will display when the page is in Create or Edit mode.

b. Level - This column indicates whether the row represents an individual Worker, a Unit, or an Office.

c. Number - This column indicates the number of the Worker, Unit, or Office.

d. Name - This column indicates the Name of the Worker, Unit, or Office.

e. **BUTTON**: Remove – Displays when the page is in Create or Edit mode and there exists at least one row in this section. Clicking

this button removes any rows with a checkmark in the selectable checkbox.

    f. **BUTTON**: Add – Displays when the page is in Create or Edit mode. Clicking this button adds an additional row to the table above this button. In the Level column of that row appears a select input containing the values "-Select-," "Office," "Unit," and "Worker" in that order. When one of the three organizational values are selected, the Select button appears in the name column of the row. Clicking it will load the Select Office, Select Unit, or Select Worker multi-select page depending on which value was chosen for level.

2.8.4 Page Validation

1. "Excluded Associations – The same Level and Number combination cannot be Additionally Associated and Excluded."
    a. If the User has added the same Level and Number combination to both the Additional Associations and Excluded Associations (e.g. the same Unit or Worker appears in both sections) and attempts to save the page, a validation is triggered.

2. "Additional Associations – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User clicks the Add button in the Additional Associations section without completing the previously added row.

3. "Excluded Associations – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User clicks the Add button in the Excluded Associations section without completing the previously added row.

2.8.5 Page Location

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

    Click on a hyperlink of the desired result displayed in the Bank Search page or the "Add Bank" button to navigate to the Bank Detail page.

    The Task Navigation will display if the user profile contains the "BankSearchView" security right.

2.8.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
BankSearchView	Bank Search;	• Bank View • Bank Edit
BankDetailView	Bank Detail;	• Bank View • Bank Edit • My Bank View
BankDetailEdit	Bank Detail;	• Bank Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Bank View	Search for and View Bank details.	• View Only
Bank Edit	View and Edit Bank details.	N/A
My Bank View	View Bank details.	• View Only

2.8.7 Page Mapping

Implement page mapping for the Bank Detail page.

2.8.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.9 Task Reassignment Search Page

2.9.1 Overview

The Task Reassignment Search page lists the Task Reassignment instructions that exist for the county. Users can set the search filters to help narrow down the results. From this page, Users can view, edit, remove, and create new reassignment instructions.

Add 'Task Reassignment' tab to Task Navigation.

2.9.2 Task Reassignment Search Page Mockup

Figure 2.9.2.1 – Task Reassignment Search Page Task Navigation

Figure 2.9.2.2 – Task Reassignment Search Page Mockup

Figure 2.9.2.3 – Task Reassignment Search Page Select Feature Mockup

2.9.3 Description of Changes

Add a Task Reassignment Search page to the LRS/CalSAWS System.

1. **BUTTON:** Search – When clicked, the Search Results Summary is refreshed to display Task Reassignment instructions based on the Search Parameters. If this button is clicked without filling in any parameters, all records are expected to display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

2. <u>Search Parameters</u>

   The following parameters display toward the top of the page and allow users to filter the Task Reassignment instructions that exist for the county. This is an expandable section toward the top of the page that displays parameters which can be used to filter the Tasks displayed on the page. It is expected to be collapsed on initial load.

   a. Title – This column will display the Title of the Task Reassignment instructions.

   b. Scheduled By – This column will display the staff member that created the instructions.
      i. **BUTTON:** Select – When clicked, will navigate the User to the "Select Staff" page. When a selection has been made, a "Clear" button will be available to clear the selection if needed.
      ii. **BUTTON**: Clear – This button appears when a Staff filter is set. Clicking this button will clear the filter for Staff.

   c. Frequency – This field indicates the frequency of the Task Reassignments. Options include One-Time, Daily (M-F), Weekly, or Every Other Week.

   d. Last Run Begin Date – This field sets a beginning range filter for the date the instruction was last executed.

e. Status – This Field indicates the status of the Task Reassignment. Options include Active or Inactive.

f. Last Run End Date – This field sets an end range filter for the date the instruction was last executed.

Note: If a Task Reassignment has not been completed, the Last Run Date will be blank. These Task Reassignments will be included in the search results when the Last Run End Date filter is blank.

3. <u>Search Results Summary:</u>

This table contains the following information for the result set that matches the User specified search criteria. Each column is sortable. The default filter displays results where the Scheduled By field is equal to the Staff User that is logged in. The expected order of the listing is by Title alphabetically. The 'Title', 'Scheduled By', 'Frequency', 'Status', and 'Last Run Date' fields are sortable for the results.

a. **BUTTON**: Add Reassignment – This button will display if the worker's security profile contains the "TaskReassignmentEdit" security right. Clicking this button will open the Task Reassignment Detail page in create mode.

The results table consists of the following columns:

b. Selectable Checkbox –For each result displayed in this section, a selectable checkbox will display if the worker's security profile contains the "TaskReassignmentEdit" security right.

c. Title – The title of the reassignment instructions. If the worker's security profile contains the "TaskReassignmentView" security right, this field will be a hyperlink that navigates to the Task Reassignment Detail page in view mode for reassignment instructions.

d. Scheduled By – The first and last name of the staff member that created the Task Reassignment instructions.

e. Frequency – The frequency in which the reassignment instruction will execute.

f. Status – The current status of the reassignment instruction.

g. Last Run Date – Displays the most recent date the reassignment instruction was executed.

h. **BUTTON**: Edit – This button will display if the worker's security profile contains the "TaskReassignmentEdit" security right. Clicking this button displays the Task Reassignment Detail page in Edit mode for the corresponding row.

i. **BUTTON**: Remove – This button will remove the reassignment instruction(s) with a checkmark in the Selectable Checkbox column making them no longer appear in the search results and execute going forward. This button will display if the worker's security profile contains the "TaskReassignmentEdit" security right.

2.9.4 Page Validation

1. "Last Run End Date – The Last Run End Date must be later than the Last Run Begin Date. Please enter a different date."

   a. A validation message displays when Last Run End Date entered is before Last Run Begin Date in the "Refine Your Search" section.

2.9.5 Page Location

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

   The Task Navigation will display if the user profile contains the "TaskReassignmentView" security right.

2.9.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskReassignmentView	• Task Reassignment Search; • Task Reassignment Detail;	• Task Reassignment View • Task Reassignment Edit

Security Right	Right Description	Right to Group Mapping
	• Task Reassignment Results List;	
TaskReassignmentEdit	• Task Reassignment Search; • Task Reassignment Detail; • Task Reassignment Results List;	• Task Reassignment Edit
SelectWorker	• Enter Report Parameters; • Select Worker; • Select Unit; • Select Office; • Select Staff;	• Task Reassignment Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Reassignment View	View Task Reassignment Details.	• View Only
Task Reassignment Edit	View and Edit Task Reassignment details. Access to Select pages for Worker, Unit, Office and Staff.	• N/A

2.9.7 Page Mapping

Implement page mapping for the Task Reassignment Search page.

2.9.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.10 Task Reassignment Detail Page

2.10.1 Overview

The Task Reassignment Detail page allows Users to manage detailed information for Task Reassignment instructions. The Task Reassignment Detail page includes information from the Search page in addition to Task Source(s), Reassignment Options, Task Destination(s), Recurrence, and Reassignment Results if available.

Add 'Task Reassignment' tab to Task Navigation.

2.10.2 Task Reassignment Detail Page Mockup

Figure 2.10.2.1 – Task Reassignment Detail Page Task Navigation

Task Reassignment Detail

- Indicates required fields

[Save and Return] [Cancel]

Title: *
Status:

Scheduled By:
Last Run Date:

Task Source(s)

- Source Worker(s)

	Level	Number	Name	
○	Unit	0100	AMU - District Attorney	

[Remove] [Add]

- Source Bank(s)

	Level	Number	Name	
○	Bank	36LSS1000284	Test Bank MS	
○	Bank		[Select]	

[Remove] [Add]

- Source Case(s)

	Level	Number	Name	
○	Case	M1001P0	Edward Charles	

[Remove] [Add]

Reassignment Options

Primary Task Sort:
Secondary Task Sort:

Reclaim Assigned Tasks:
No

Number of Tasks:
Maximum Number of Tasks: *

Due Date:
Past Due

Task Priority:
Custom Task Priority: *
Custom   ○ Critical ○ High ○ Medium ○ Low

- Task Types

	Task Category	Task Type	Task Sub-Type
○	Application Registration	ABD MC RE Packet	August

[Remove] [Add]

- Programs

☐ AAP   ☐ Adult Protective Services
☐ ARC   ☐ Cal-Learn
☐ CalFresh   ☐ CalWORKs
☐ CAPI   ☐ CFET
☐ Child Care   ☐ Child Protective Services
☐ Diversion   ☐ Foster Care
☐ General Assistance (Managed)   ☐ General Assistance (Non-Managed)
☐ Homeless - Perm   ☐ Homeless - Temp
☐ Immediate Need   ☐ In-Home Supportive Services (IHSS)
☐ IV-D Child Support   ☐ Kin-GAP
☐ LIHP   ☐ Linkages Adult Services
☐ Med-Cal   ☐ Multipurpose Senior Services
☐ Nutrition Benefit   ☐ PCSP
☐ RCA   ☐ Welfare to Work

Task Destination(s)

- Destination Worker(s)

Reassignment Method:
Remove Assigned Banks:
No

	Level	Number	Name	
○	Office	3C	SB TAD OZ/WTW/CMd Care/FID	

[Remove] [Add]

- Destination Bank(s)

Reassignment Method:
Remove Assigned Workers:
No

Level	Number	Name	
			[Add]

Recurrence

Frequency: *   **Begin Date:** *   **End Date:** *
Daily (M-F)   08/19/2020   08/19/2020

[Save and Return] [Cancel]

Figure 2.10.2.2 – Task Reassignment Detail Create/Edit Mode Page Mockup

Task Reassignment Detail

✷ - Indicates required fields

[View Results] [Copy] [Edit] [Close]

Title: ✷
closed case tasks - 3/18 forward

Status:
Inactive

Scheduled By:
Morag Athey

Last Run Date:
11/04/2019

Figure 2.10.2.3 – Task Reassignment Detail View Mode Mockup

2.10.3 Description of Changes – Create/View/Edit Mode

Add a Task Reassignment Detail page to the LRS/CalSAWS System.

1. **BUTTON:** View Results -- This button navigates the User to the Task Reassignment Results List page which includes details for each reassignment based on the instructions (See Section 2.11). This button appears when the page is in view mode and Task Reassignment results exist.

2. **BUTTON:** Copy – This button navigates the User to the Task Reassignment Detail page in create mode, with all the details pre-populated to match the originating Task Reassignment Detail page. This button appears when the page is in view mode and the user's security profile contains the "TaskReassignmentEdit" security right.

   Note: The following fields will not be copied over to the new Task Reassignment. Standard defaults will apply for these fields:
   a. Scheduled By
   b. Last Run Date
   c. Recurrence Begin Date
   d. Recurrence End Date

3. **BUTTON:** Edit – This button appears when the page is in view mode and places the page into edit mode for the current Task Reassignment instruction. The button displays if the user's security profile contains the "TaskReassignmentEdit" security right.

4. **BUTTON:** Close – This button displays when the page is in view mode and when clicked, closes the page and navigates the user back to the Task Reassignments Search page.

5. **BUTTON:** Save and Return – This button navigates the User back to the Task Reassignment Search page, and commits the changes entered in the screen. This button appears when the page is in create or edit mode.

6. **BUTTON:** Cancel – This button navigates the user back to the Task Reassignment Search page and does not commit any of the changes entered in the screen. This button appears when the page is in create or edit mode.

7. Title **(Required)** – This field represents the Title of the Task Reassignment instructions the User has created. This field has a maximum length of 50 characters.

8. Status – This field indicates the current status of the Task Reassignment instruction. The values of this field can be:
   a. Active: The Task Reassignment instruction is set to execute based on the Recurrence/Frequency set by the User.
   b. Inactive: The Task Reassignment instruction will not be executed.

   The default value is Active when the page is in create mode and cannot be modified until after the instruction is saved.

9. Scheduled by – This column will display the User that creates and schedules the Task Reassignment.

   By default, the name displayed in this field is associated to the logged in User's staff record.

10. Last Run Date – This field displays the day the Task Reassignment instruction was last executed.
    This field will be blank if the task Reassignment has not yet been executed.

11. Task Source(s) **(Required)**:

    a. Source Worker(s):
       i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Workers can be removed by checking the selectable checkbox and clicking the "Remove" button.
       ii. Level – This column displays the Level of the organization selected for a given row. The possible values are Worker, Unit, or

Office. When a value is selected, the Select button is displayed in the same row in the table.

    iii. Number – This column displays the Number or Code associated to the selected organization or Worker.

    iv. Name – This column displays the Name associated to the selected organization or Worker.

    v. **BUTTON**: Select – This button will open Select Worker, Select Unit, or Select Office page depending on the value selected in the Level dropdown. Once a value is selected from the Select Worker, Select Unit or Select Office page, the Add button can be used to add the row to the Source Worker table. This button will display when the page is in create or edit mode.

    vi. **BUTTON**: Add – This button inserts a new row in the table. A new row will not be inserted if a row was previously added and has not been completed. This button will display when the page is in create or edit mode.

    vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

b. Source Bank(s):

    i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Banks can be removed by checking the selectable checkbox and clicking the "Remove" button.

    ii. Level – This column will display "Bank"

    iii. Number – This column displays the Bank ID for each Bank displayed in this section.

    iv. Name – This column displays the Bank Name for each Bank displayed in this section.

    v. **BUTTON**: Select – This button will display the Select Bank page (See assumption #2 in Section 1.4). This button will display when the page is in create or edit mode.

    vi. **BUTTON**: Add – This button inserts a new row in the table and displays the "Select" button for the rows allowing the user to select a specific Bank. This button will display when the page is in create or edit mode.

    vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

c. Source Case(s):

i. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Source Cases can be removed by checking the selectable checkbox and clicking the "Remove" button.

ii. Level – This column will display "Case"

iii. Number – This column displays the Case Number for each Case displayed in this section.

iv. Name – This column displays the Case Name for each Case displayed in this section.

v. **BUTTON**: Select – This button will display the Person Search page. This button will display when the page is in create or edit mode.

vi. **BUTTON**: Add – This button inserts a new row in the table and displays the "Select" button for the row allowing the user to select a specific Case. This button will display when the page is in create or edit mode.

vii. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

12. Reassignment Options:

a. Primary Task Sort – This dropdown determines the order of the Tasks to be reassigned. The default option is by oldest due date first. The User can change this value to one of the following options:

i. Due Date – Ascending

ii. Due Date – Descending

iii. Created Date – Ascending

iv. Created Date – Descending

v. Worker Assigned Date – Ascending

vi. Worker Assigned Date – Descending

vii. Task Priority – Low to Critical

viii. Task Priority – Critical to Low

Note: Ascending means the oldest date will be listed first. Descending means the oldest date will be listed last.

b. Secondary Task Sort – This dropdown determines the order of the Tasks to be reassigned if the Primary Task Sort results in a tie. The default option is by oldest created date first. The User can change this value to one of the following options:

i. Due Date – Ascending

ii. Due Date – Descending

iii. Created Date – Ascending

iv. Created Date – Descending

v. Worker Assigned Date – Ascending

vi. Worker Assigned Date – Descending

vii. Task Priority – Low to Critical

viii. Task Priority – Critical to Low

Note: Ascending means the oldest date will be listed first. Descending means the oldest date will be listed last.

c. Reclaim Assigned Tasks – This dropdown allows the User to indicate that the Task Reassignments should be reclaimed, or undone, for any Tasks that remain assigned at the next occurrence of the reassignment instructions. This action would occur before the next scheduled Task Assignment is completed. Options include:

i. Yes

ii. No

d. Number of Tasks – This dropdown allows the User to restrict the total number of Tasks that are reassigned. By default, this field will allow reassignment of all the Tasks assigned to the Workers and organizations identified in the Task Source(s) Panel. The User can select one of the following options:

i. All Assigned Tasks

ii. Maximum Number of Tasks – When selected, a **Required** "Maximum Number of Tasks" field will appear prompting the user to enter a number indicating the maximum number of tasks to be reassigned. This field has a maximum length of four characters. Valid inputs are numbers from 1-2500 only.

iii. Number of Tasks per Worker - When selected, a **Required** "Number of Tasks per Worker" field will appear prompting the user to enter a number indicating the number of tasks to be reassigned per worker.

iv. Percentage of Assigned Tasks – When selected, a **Required** "Percentage of Assigned Tasks" field will appear prompting the user to enter a percentage of tasks to be reassigned. This field has maximum length of three characters. Valid inputs are numbers from 1-100 only.

e. Due Date – This dropdown determines if tasks to be reassigned will be filtered by their Due Date. The default option allows Tasks to be

reassigned, regardless of their due date. The User can update this setting to one of the following options:

    i. Any – All Tasks will be considered regardless of Due Date

    ii. Past Due – Only Tasks with a Due Date prior to the Task Reassignment run date will be reassigned.

    iii. Next 7 Days – Only Tasks with a Due Date within the next 7 calendar days of the Task Reassignment run date will be reassigned.

    iv. Next 30 days – Only Tasks with a Due Date within the next 30 calendar days of the Task Reassignment will be reassigned.

    v. Custom – User specified dates entered into secondary prompts for Begin Due Date and End Due Date.

  f. Task Priority – This dropdown lets the User choose the following options for the priority of the Task Reassignment:

    i. Any

    ii. Custom – When selected, a **Required** "Custom Task Priority" section will display the four possible Priority values with checkboxes. Priorities that have been selected to apply to the Task Reassignment have check marks to the left of them. The Field is only visible when Custom is chosen in the Task Priority field. When visible, this field is required to have at least one of the boxes checked. The Task Reassignment will then only reassign Tasks if the Priority of their associated Task Types matches one of the values checked in this field. The following are the options for Custom Task Priority:

      1. Critical

      2. High

      3. Medium

      4. Low

13. <u>Task Types:</u>

By default, this section loads in collapsed view with no rows specified. This means Tasks of any Type and Sub-Type will be included in the Task Reassignment process. Note: This section will load in expanded mode if at least one row is specified in the filter table. The User may expand this section and specify Task Types and Task Sub-Types to be included in the Task Reassignment process. The following columns and buttons are displayed so the User can specify their filter:

  a. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Task Type rows

can be removed by checking the selectable checkbox and clicking the "Remove" button.

b. Task Category – This column displays the Task Category for each row, if the worker has selected a Task Category for the row. When adding a new row, Task Category is not a required field; the user may choose a Task Type without selecting a Task Category. However, if the user selects a Task Category, the Task Type dropdown will only display Task Types available within the selected Task Category. Similarly, if the user does not select a Task Category value, and they do select a Task Type value, the Task Category value will remain blank. The Task Category dropdown will include all available Task Categories.

c. Task Type – This column displays the Task Type for each row. When adding a new row, a dropdown will display with all available Task Types for the county. However, if the user has selected a value in the Task Category dropdown, the Task Type dropdown will only display Task Types available within the selected Task Category for the county. A value is not required in this field as a user may choose to reassign tasks based on a Task Category alone.

d. Task Sub-Type – This column contains Task Sub-Type information. When adding a new row, a dropdown will display with all available Task Sub-Types for the Task Type selected in the Task Type dropdown.

e. **BUTTON**: Add – This button inserts a new row in the table and will display when the page is in create or edit mode.

f. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox and will display when the page is in create or edit mode.

14. Programs: By default, this section loads in collapsed view with no programs checked. This means Tasks associated to any program will be included in the Task Reassignment process.

The User may expand this section and choose to identify a program, or set of programs, from which to draw Tasks. Programs that are considered intake programs or external programs will be displayed. Refer to Appendix Section 7.1 for a current list of intake/external programs.

15. Task Destination(s) **(Required)**:

a. Destination Worker(s):
   i. Reassignment Method – This dropdown allows the User to choose how the Tasks are reassigned to the Worker Destinations. These are the following options for Reassignment Method:

1. Evenly Among Workers
2. First Available Then Evenly

ii. Remove Assigned Banks – This dropdown allows the User to choose whether to remove any existing Bank Assignments when Reassigning Tasks to Workers. The following options for removing assigned Banks are:

1. Yes
2. No (default value)

iii. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Destination Worker rows can be removed by checking the selectable checkbox and clicking the "Remove" button.

iv. Level – This column displays the Level of the organization selected for a given row. The possible values are Worker, Unit, or Office. When a value is selected in the dropdown while adding a row, the Select button is displayed in the same row in the table.

v. Number – This column displays the Number or Code associated to the selected organization or Worker.

vi. Name – This column displays the Name associated to the selected organization or Worker.

vii. **BUTTON**: Select – This button will open Select Worker, Select Unit, or Select Office page depending on the value selected in the Level dropdown. Once a value is selected from the Select Worker, Select Unit or Select Office page, the Add button can be used to add the row to the Source Worker table. This button will display when the page is in create or edit mode.

viii. **BUTTON**: Add – This button inserts a new row in the table. This button will display when the page is in create or edit mode.

ix. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. This button will display when the page is in create or edit mode.

b. Destination Bank(s):

i. Reassignment Method – This field allows the User to choose how Tasks are reassigned to the Bank Destinations. The options include:

1. Evenly Among Banks
2. First Available Then Evenly

ii. Remove Assigned Workers – This field allows the User to choose whether to remove any existing Worker assignments when Reassigning Tasks to Banks. The options include:

1. Yes
2. No

iii. Selectable checkbox – For each result displayed, a selectable checkbox will display at the beginning of the row. Destination Banks can be removed by checking the selectable checkbox and clicking the "Remove" button.

iv. Level – This column will display "Bank"

v. Number – This column displays the Bank ID for each Bank displayed in this section.

vi. Name – This column displays the Bank Name for each Bank displayed in this section.

vii. **BUTTON**: Select – This button will display the Select Bank page (See assumption #2 in <u>Section 1.4</u>). The button will display when the page is in create or edit mode.

viii. **BUTTON**: Add – This button inserts a new row in the table and displays the "Select" button for the rows allowing the user to select a specific Bank. The button will display when the page is in create or edit mode.

ix. **BUTTON**: Remove – This button will remove rows within the table with a checkmark in the Selectable checkbox. The button will display when the page is in create or edit mode.

16. <u>Recurrence:</u>

a. Frequency **(Required)** – Four options are available:

i. One-Time (Default) – This instruction will only run once.

ii. Daily (M-F) – This instruction will run on a daily basis- Monday through Friday.

iii. Weekly – This instruction will run every week on the weekday(s) selected- Monday through Friday.

iv. Every Other Week – This instruction will run every other week on the weekday(s) selected- Monday through Friday.

LRS/CalSAWS System holidays are excluded.

b. Begin Date **(Required)** – This is the start date for the Task Reassignment instructions. The value is defaulted to the current LRS/CalSAWS System date.

Note: This field is not editable after the Task Reassignment has been executed for the first time. This field displays for any value selected in the Frequency dropdown.

c. End Date **(Required)** – Displays when the value selected in the Frequency dropdown is "Daily (M-F)", "Weekly" or "Every Other Week". This is the end date for Task Reassignment instructions.

This value is defaulted to one year from the LRS/CalSAWS System date when the page is in create mode. It cannot be edited to be more than one year from the LRS/CalSAWS System date.

    d. Weekday(s) **(Required)** – Displays when the value selected in the Frequency dropdown is "Weekly" or "Every Other Week". Weekday names (Monday through Friday) will display with a checkbox available for each day allowing the user to select one or more weekdays.

2.10.4 Description of Changes – Results Mode

Display the top pane of the Task Reassignment Detail page in results mode when navigating from the Task Reassignment Results List page (See section 2.11). When the Task Reassignment Detail page is accessed through the Task Reassignment Results List Page, there are additional fields displayed related to the specific Task Reassignment occurrence that ran. The Task Reassignment Detail page will also display a snapshot of the detail settings for the Task Reassignment as they were at the time of the reassignment.

Task Reassignment Detail

✱- Indicates required fields

Close

Title: ✱	Status:
CCRR ALL DIST	Inactive
Scheduled By:	Run Date:
Alexandra Furman	01/24/2020
Run Result:	Tasks Reassigned:
Processed	1001
Run Result Detail:	Reclaimed On:
	01/27/2020
	Tasks Reclaimed:
	906

Figure 2.10.4.1 – Task Reassignment Detail Results Mode Page Mockup

1. **BUTTON:** Close – This button closes the page and navigates the User back to the Task Reassignment Results List page.

The following fields display only when the page is in results mode:

2. Run Date – This field displays the date the Task Reassignment was run.

3. Run Result – This field displays the result status for the Task Reassignment. The result can be one of the following two statuses:

    a. Processed

    b. Not Processed

4. Tasks Reassigned – This field displays the number of Tasks that were reassigned.

5. Run Result Detail – This field displays additional information if the Run Result is Not Processed. Possible values include:

    a. Task Source(s) Do Not Have Task Assignments
    b. Number of Tasks to Reassign Is Over Limit

6. Reclaimed On – This field displays the date the Task Reassignment was reclaimed. A date will not appear under the following conditions:
    a. The Task Reassignment has not been reclaimed yet
    b. The Task Reassignment is not set to Reclaim Assigned Tasks
    c. The Task Reassignment resulted in 0 Task Reassignments

7. Tasks Reclaimed – This field displays the number of Tasks that were reclaimed. This column will have a value when there is a date in the 'Reclaimed On' field.

2.10.5 Page Validation

1. "Title – The title is already in use by the staff member listed in the Scheduled By field."
    a. A validation message is displayed when the User attempts to save a Task Reassignment with the same Title entered for the same User that is scheduling the Task Reassignment. Upper and Lower case is not considered for uniqueness.

2. "Task Source(s) – A new row may not be added until the last row has been completed."
    a. A validation message displays when the User attempts to add a row in the Task Source(s) table before completing the last row on that table.

3. "Task Types – A new row may not be added until the last row has been completed."
    a. A validation message displays when the User attempts to add a row in the Task Types table before completing the last row on that table.

4. "Task Destination(s) – A new row may not be added until the last row has been completed."
    a. A validation message displays when the User attempts to add a row in the Task Destination(s) table before completing the last row on that table.

5. "Maximum Number of Tasks – Input value must be a number from 1 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Maximum Number of Tasks secondary prompt.

6. "Percentage of Assigned Tasks – Input value must be a number from 1 – 100. Please enter a different value."

a. A validation message displays when the User attempts to input an invalid value in the Percentage of Assigned Tasks secondary prompt.

7. "Begin Date – The Recurrence Begin Date must not be in the past. Please enter a different date."
   a. A validation message displays when the Users attempts to save a Task Reassignment instruction with a Begin Date in the past.

8. "End Date – The Recurrence End Date must not be in the past, earlier than the Begin Date, or greater than a year from the current date."
   a. A validation message displays when the Users attempts to save an active Task Reassignment instruction with an End Date in the past, an End Date prior to the Begin Date, or an End Date greater than a year from the C-IV System date.

9. "End Due Date – The End Due Date must be later than the Begin Due Date. Please enter a different date."
   a. A validation message displays when End Due Date entered is before Begin Due Date in the Reassignment Options Panel for "Custom" Due Date.

10. "Remove Assigned Workers – This reassignment has at least one Worker as a destination."
    a. Add a validation to display when the User attempts to save the reassignment with "Yes" selected in the Remove Assigned Workers field and populated at least one Worker Destination.

11. "Remove Assigned Banks – This reassignment has at least one Bank as a destination."
    a. Add a validation to display when the User attempts to save the reassignment with "Yes" selected in the Remove Assigned Banks field and populated at least one Bank Destination.

12. "Task Source(s) – A Worker or Bank must be included as a source."
    a. Add a validation to display when the User attempts to save the reassignment without populating at least one Worker or Bank in the Task Source(s) section. This is an update to the existing Task Source(s) "field is required" validation.

13. "Task Destination(s) – A Worker or Bank must be included as a destination."
    a. Add a validation to display when the User attempts to save the reassignment without populating at least one Worker or Bank in the Task Destination(s) section.

14. "Source Worker(s) – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User attempts to add a row in the Source Worker(s) section before completing the last row added to that table.

15. "Source Bank(s) – A new row may not be added until the last row has been completed."

a. Add a validation to display if the User attempts to add a row in the Source Bank(s) section before completing the last row added to that table.

16. "Destination Worker(s) – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User attempts to add a row in the Destination Worker(s) section before completing the last row added to that table.

17. "Destination Bank(s) – A new row may not be added until the last row has been completed."
    a. Add a validation to display if the User attempts to add a row in the Destination Bank(s) section before completing the last row added to that table.

18. "Number of Tasks – A Worker must be included as a destination."
    a. Add a validation to display if the User attempts to save the reassignment after selecting "Number of Tasks per Worker" in the Number of Tasks field without at least a single Worker added to the Destination Workers section.

19. "Custom Task Priority – The values selected conflict with the priorities associated to the selected Task Types. Please select additional values for Custom Task Priority."
    a. If the User attempts to save a Task Reassignment having checked at least one Custom Task Priority and chosen at least one Task Type, but none of the checked Priorities match a Priority of the selected Task Types or Sub-Types, a validation message is triggered. This is to prevent Users from saving Task Reassignment jobs that will not reassign any Tasks.

       This validation also displays if the User has selected at least one Custom Task Priority and not chosen any Task Types, but none of the Task Types or Sub-Types in the County have a Priority that match at least one of the Custom Task Priority selections.

20. "Number of Tasks per Worker – Input value must be a number from 1 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Number of Tasks per Worker field.

21. "Number of Tasks – This option conflicts with the selected Reassignment Method. Please update the Reassignment Method, or select another option."
    a. A validation message displays when the User attempts to save with a Number of Tasks selection of 'Number of Tasks per Worker' and a Reassignment Method of 'First Available Then Evenly'.

2.10.6 Page Location

- **Global:** Admin Tools

- **Local:** Office Admin
- **Task:** Tasks > Task Reassignment > Click on a hyperlink of the desired result displayed in the Task Reassignment Search page or the "Add Reassignment" button to navigate to the Task Reassignment Detail page.

  The Task Navigation will display if the user profile contains the "TaskReassignmentView" security right.

2.10.7 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskReassignmentView	- Task Reassignment Search; - Task Reassignment Detail - Task Reassignment Results List;	- Task Reassignment View - Task Reassignment Edit
TaskReassignmentEdit	- Task Reassignment Search; - Task Reassignment Detail; - Task Reassignment Results List;	Task Reassignment Edit
SelectWorker	- Enter Report Parameters; - Select Worker; - Select Unit; - Select Office; - Select Staff;	Task Reassignment Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Reassignment View	View Task Reassignment Details.	• View Only
Task Reassignment Edit	View and Edit Task Reassignment details. Access to Select pages for Worker, Unit, Office and Staff.	• N/A

2.10.8 Page Mapping

Implement page mapping for the Task Reassignment Detail page.

2.10.9 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.11 Task Reassignment Results List Page

2.11.1 Overview

This page lists the Task Reassignment Results for the Task Reassignment that was displayed on the Task Reassignment Detail page. The User can view reassignment results and details of the Task Reassignment instructions for each run.

2.11.2 Task Reassignment Results List Mockup

Task Reassignment Results List

Close

▼ Refine Your Search

Search

| Run Begin Date: | Tasks Reassigned Min: | Run Result: |
| Run End Date: | Tasks Reassigned Max: | |

Results per Page: 25 Search

Search Results Summary — **Results 1 – 25 of 104**

1 2 3 4 5 Next

Run Date	Run Result	Run Result Detail	Tasks Reassigned	Reclaimed On	Tasks Reclaimed
01/29/2020	Processed		886	01/30/2020	816
01/28/2020	Processed		911	01/29/2020	856
01/27/2020	Processed		951	01/28/2020	876
01/24/2020	Processed		1001	01/27/2020	906
01/23/2020	Processed		1017	01/24/2020	949
01/22/2020	Processed		1042	01/23/2020	987
01/21/2020	Processed		1088	01/22/2020	1017
01/20/2020	Processed		1130	01/21/2020	1058

1 2 3 4 5 Next

Close

Figure 2.11.2.1 – Task Reassignment Results List Page Mockup

2.11.3 Description of Changes

Add a Task Reassignment Results List page to the LRS/CalSAWS System.

1. **BUTTON:** Close – This button closes the page and navigates the User back to the Task Reassignment Detail page.

2. **BUTTON:** Search – When clicked, the Search Results Summary is refreshed to display Tasks that match the search criteria in the Search Parameters section. If this button is clicked without filling in any parameters, all records are expected to display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

3. <u>Refine Your Search:</u> Allows User to choose the number of search results displayed per page. This is an expandable section toward the top of the page that displays parameters which can be used to filter the Tasks displayed on the page. It is expected to be collapsed on initial load. The expected order of the listing is by Run Date chronologically. The 'Run Date', 'Run Result', 'Run Result Detail', 'Tasks Reassigned',

'Reclaimed On', and 'Tasks Reclaimed' fields are sortable for the results. Search can filter the results by the following criteria:

    a. Run Begin Date – This field allows the User to input the beginning date for the search range when the Task Reassignment was executed

    b. Run End Date – This field allows the User to input the end date for the search range when the Task Reassignment was executed.

    c. Tasks Reassigned Min – This text field allows the User to input the minimum total number of Tasks that were reassigned. Valid inputs are numbers from 0 – 2500 only.

    d. Tasks Reassigned Max – This text field allows the User to input the maximum total number of Tasks that were reassigned. Valid inputs are numbers from 0 – 2500 only.

    e. Run Result – This dropdown field allows the User to search by the results status for the Task Reassignment. Options include:
        i. Processed
        ii. Not Processed

4. <u>Search Results Summary:</u> Contains the following information for the result set that matches the User specified search criteria. Each column is sortable. Default sort is Run Date descending.

Note: Results are kept up to one year from their run date. After one year, the results are purged from the LRS/CalSAWS System.

    a. Run Date – This column indicates the date the instruction was executed. Hyperlink leads to the Task Reassignment Detail page in results mode (See Section 2.10.4) for the selected run date.

    b. Run Result – This column indicates the result status for the Task Reassignment, options include:
        i. Processed
        ii. Not Processed

    c. Run Result Detail – This column indicates additional information if the Run Result is Not Processed. Possible values are:
        i. Task Source(s) Do Not Have Task Assignments
        ii. "Number of Tasks to Reassign (#) Is Over Limit (2500)" where the # equals the number of Tasks to reassign.
        iii. Task Destination(s) Do Not Have Active Workers" and will correspond to a Run Result of "Not Processed."

    d. Tasks Reassigned – This column indicates the number of Tasks that were Reassigned.

    e. Reclaimed On – This column indicates the date the Task Reassignment was reclaimed. A date will not appear under the following conditions:
        i. The Task Reassignment has not been reclaimed yet
        ii. The Task Reassignment is not set to Reclaim Assigned Tasks

iii.   The Task Reassignment resulted in 0 Task Reassignments

f. Tasks Reclaimed – This column indicates the number of Tasks that were reclaimed. This column will have a value when there is a date in the 'Reclaimed On' column.

2.11.4 Page Validations

1. "Run End Date – Run End Date must be later than the Run Begin Date. Please enter a different date."
    a. A validation message displays when Run End Date entered is before Run Begin Date in the "Refine Your Search" section.
2. "Run Begin Date – Task Reassignment results are limited to one year. Please enter a different date."
    a. A validation message displays when the User enters Run Begin Date more than a year in the past.
3. "Tasks Reassigned Max – Input value must be a number from 0 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Tasks Reassigned Max.
4. "Tasks Reassigned Min – Input value must be a number from 0 – 2500. Please enter a different value."
    a. A validation message displays when the User attempts to input an invalid value in the Tasks Reassigned Min.
5. "Tasks Reassigned Max – Task Reassigned Max must be greater than or equal to the Task Reassigned Min value. Please enter a different value."
    a. A validation message displays when the User attempts to input a value in Tasks Reassigned Min field that is greater than the value in Tasks Reassigned Max.

2.11.5 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Tasks > Task Reassignment > Click on a hyperlink of the desired result displayed in the Task Reassignment Search page to navigate to the Task Reassignment Detail page > Click the View Results button which will display if the Task Reassignment instruction has run at least once.

2.11.6 Security Updates

This page does not have specific security assigned because it is accessed through the Task Reassignment Detail page. The user can only access the Task Reassignment Detail page with the security defined in Section 2.10.7,

which by default also allows access to the Task Reassignment Results List page.

2.11.7 Page Mapping

Implement page mapping for the Task Reassignment Results List page.

2.11.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.12 Remove the Current LRS/CalSAWS Task Reassignment Pages

2.12.1 Overview

The Task Reassignment pages outlined in Sections 2.9, 2.10, and 2.11 will replace the existing Task Reassignment Detail, Task Reassignment Confirmation and Pending Task Reassignments pages in the LRS/CalSAWS System. The existing pages will be removed.

2.12.2 Description of Changes

1. Remove the navigation to access the existing Task Reassignment pages located at:
   - **Global:** Admin Tools
   - **Local:** Task Reassignment

   The following pages will no longer be accessible:
   - Task Reassignment Detail – Located at Task Navigation: Task Reassignment
   - Task Reassignment Confirmation List – Located at Task Navigation: Task Reassignment Confirmation
   - Pending Task Reassignments List – Located at Task Navigation: Pending Task Reassignments

2. Update worker security profiles who have access to the existing Task Reassignment pages to now have access to the Task Reassignment pages introduced in sections 2.9, 2.10, and 2.11:
   a. The "Task Reassignment" security group within LRS/CalSAWS grants full access (view and create) to all 3 of the pages mentioned in recommendation Section 2.12.2.1 above. This means that any worker within LRS/CalSAWS who has the "Task Reassignment" security group associated to their security

profile can create and execute Task Reassignment instructions.

To preserve the ability for these staff to create Task Reassignment instructions, create a one-time data change to associate the "Task Reassignment Edit" security group to the security profile of any user who has the "Task Reassignment" security group within LRS/CalSAWS. (Reference Section 2.10.7 regarding the "Task Reassignment Edit" security group).

If the "Task Reassignment" security group is directly assigned to the user as an individual group assignment, the "Task Reassignment" assignment will be end dated and a new individual "Task Reassignment Edit" security group will be associated to the user.
Regarding Security Roles, the "Task Reassignment" security group will be removed from any Security Roles that currently include it. The "Task Reassignment Edit" security group will then be associated to each Security Role that previously contained the "Task Reassignment" security group.

3. After the completion of the security reassociation in Section 2.12.2.2, remove security rights and security groups for the pages that are being removed:
    a. End date any active assignments of the "Task Reassignment" security group. The "Task Reassignment View" and "Task Reassignment Edit" security groups will now be used to access the Task Reassignment pages.

    An "active assignment" is an assignment of a security group directly (SECURE_USER_GRP database table) or via a security role (SECURE_ROLE_GRP database table).
    b. Remove the "Task Reassignment" security group from LRS/CalSAWS to prevent the group from being assigned in the future.

    Developer Note: Set SECURE_GRP.VISBL_IND = 'N'

Note: The current LRS/CalSAWS Task Reassignment pages run an evaluation in real-time to determine if the reassignment instructions will result in 50 or less Tasks being reassigned. If there are 50 or less Tasks, the reassignment will occur in real-time, otherwise the reassignments occur during the nightly batch processes. Reassignment instructions created with the Task Reassignment page being introduced with Section 2.11 will only occur with the nightly batch processes. Please reference CA-214929 for DDID 655 which outlines the real time reassignment capability on the Task Search page.

4. Deactivate the LRS/CalSAWS Task Reassignment Batch Job (PB19A100). See Sections 2.16 through 2.19 for logic of the replacement Batch Jobs.

2.13 Worklist and Worklist PR RE Page

2.13.1 Overview

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

2.13.2 Worklist Page Mockup

Figure 2.13.2.1 – Worklist Page Mockup

Worklist PR / RE

*- Indicates required fields

[Search]

Case Number: [_____] [Select]   Status: [Assigned ▾]

Organization Level: [Worker ▾]   Organization Number: 19AS0000B7 [Select]

Organization Name: Mayuri Srinivas

Program: [_____▾]   Program Status: [_____▾]

Due Date   Submit Month: [_____] 📅

From: [_____] 📅   To: [_____] 📅   Primary Case Language:
[English
Spanish
Afghani ▾]

[Search]

YBN	Type	Worker ID	Case Number	Program	Status	Submit Month	Appointment Date	Language

No Data Found

Get Next

Category: [All ▾]

Primary Case Language:
[English
Spanish
Afghani ▾]

[Get Next]

Figure 2.13.2.2 – Worklist PR RE Page Mockup

Get Next

Category: [All ▾]

Primary Case Language:
[English
Spanish
Afghani ▾]

[Get Next]

Figure 2.13.2.3 – Get Next Feature Mockup

2.13.3 Description of Changes

1. Update the logic of the Get Next button on the Worklist and Worklist PR RE pages:

   a. Current logic first finds the MAQ that is associated to the same Office and Unit of the logged in worker. It will then retrieve a task from the MAQ where the Category of the task is also associated to the Position Detail page for the worker's Worker Number. This condition is to make sure the worker's position can receive that type of task.

      Update the above logic to evaluate for Banks instead of MAQs. The Get Next button will now find Banks that the logged in worker is associated to. It will then retrieve a Task from the Bank where the Category of the Task is also associated to the Position Detail page of the worker's Worker Number and update the Task status to "In Process".

      Reference Section 2.21 for the specifics of converting MAQs into Banks.

   b. Update the logic to no longer require a Task Type to be indicated as having "Office Distribution". Both a Bank and a Worker's Position will have Task Categories defined, which are compared on assignment of a Task through Get Next functionality. The functionality already confirms that the requesting Worker can receive the category type of the Task that Get Next provides.

2. If no tasks are available when the Get Next button is used, the following message currently displays:
   "No tasks are available from the Master Assignment Queue to be assigned at this time."

   Modify the text of this message to no longer reference Master Assignment Queue as follows:
   "There are no tasks available to be assigned at this time."

3. Update the Category dropdown within the "Get Next" section of the Worklist pages to only display Active Office Distribution Task Categories that match the selected Task Categories on the worker's Position Detail Page. Currently, this dropdown menu displays all Active Office Distribution Task Categories regardless if the worker's position can receive these Task Categories. This modification will resolve the scenario in which a worker may request a Task with a Task Category that they are not able to receive.

4. Update the "Complete" button on the Worklist pages to display if the Task is in an Assigned or In Process status.

5. A Task Detail page can be accessed via the Worklist pages by adding a Task or Editing a Task. Update this Task Detail page as follows:

   a. With the introduction of Bank functionality, a Task may be assigned to a Bank without being assigned to a Worker ID. Update the required "Worker Assigned" field on Task Detail to only enforce required validation when the Task Detail page is in Create Mode. When the page is in Edit Mode, it is possible to view a Task which is only assigned to a Bank. In this instance, the Task Detail page does not allow editing of the Worker Assigned field when the page is in Edit Mode, however validation will still enforce the existence of a value. This modification will not enforce the required Worker Assigned field when the page is in Edit mode.

   b. With the expiration options that are available on the Task Type Detail page, an expiration date cannot always be calculated at the time the Task is created. For example, if the Task Type indicates to expire the Task 5 days after the program closes, the program closure date is not a value that is known in advance. Update the Expiration Date logic during Task Creation on the Worklist Task Detail page to determine an Expiration Date if the Task Type "Expiration Type" value is "After Task Is Created". Reference Section 2.3.3 for specifics of the Expiration Type field. This page will still display the "Expiration Date:" label if an expiration date does not exist.

Note: A Task Detail page is currently accessible through the Worklist pages allowing users to view and create Tasks. SCR CA-214929 for DDID 655 is introducing a new version of a Task Detail page that is accessible via a dedicated Task Management pop-up window. The functionality of the new Task Detail page does not require a Task to be associated to a Worker ID; a Task may now be associated to a Bank as well. Other than the recommendations described above regarding the Get Next functionality on the Worklist pages, the Task Detail page that is accessible through the Worklist pages will not be modified to support additional Bank functionality such as the assignment of Tasks to Banks. This page will continue to function as is with the new features available through the dedicated Task Management pop-up window described in SCR CA-214929.

2.13.4 Page Location

- **Global:** Case Info

- **Local:** Tasks
- **Task:** Worklist
    Worklist PR RE

2.13.5 Security Updates

N/A

2.13.6 Page Mapping

N/A

2.13.7 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.14 Position Detail Page

2.14.1 Overview

The Position Detail page includes a "Case Load" attribute indicating if the position is "Traditional" or "Master Assignment Queue". The Master Assignment Queue functionality is being replaced by the Task Bank functionality which will obsolete the Case Load attribute.

2.14.2 Position Detail Page Example

Position Detail

*- Indicates required fields   [Edit]   [Copy]   [Close]

General Position Information

Worker ID:
19DP3400FI

Office Name: *
034 Lancaster

Section: *
51

Unit ID: *
00 00

Position Status: *
Active

Assignment Type Code:

Worker Level:

Auto Assign Indicator:

Max Case Load:
0

SSI Referrals:
No

Max Intake Case Load:

Authorization Sampling Percentage:
10

Current Case Load:
0

Case Load:
Master Assignment Queue

Total Percentage of Cases Assigned:
0%

IHSS Referrals Auto Assignment: *
No

Figure 2.14.2.1 – Position Detail Page View Mode Example

2.14.3 Description of Changes

1. Update the "Case Load" attribute on the Position Detail page to be read only. The attribute will no longer be editable and underlying logic will default the value in the data model to "Traditional" ongoing. The field will remain visible for historical purposes. MAQs may be deactivated at the county's discretion as the Get Next functionality on the Worklist pages will no longer be based on MAQs per Section 2.13.3.

2.14.4 Page Location

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

  Click on a hyperlink of the desired result displayed in the Position Search page to navigate to the Position Detail page.

2.14.5 Security Updates

N/A

2.14.6 Page Mapping

N/A

2.15 Task to Program Association

2.15.1 Overview

Currently, Tasks within LRS/CalSAWS are associated to Cases. More technically, the link within the data model ties a Task directly to a Case ID. Functionality within the C-IV System connects a Task to a Case via a Program association:

LRS/CalSAWS: Task > Case

C-IV: Task > Program > Case

Much of the functionality being introduced within this design document and within the design of SCR CA-214929 regarding DDID 655 depends on the association of a Task to a Program. This section outlines the necessary modifications to begin storing the Task to Program data relationship in LRS/CalSAWS.

2.15.2 Description of Changes

1. Update existing Task creation and assignment logic to determine and store a Task to Program relationship in the TASK_PGM table.
   a. Task assignment logic determines the highest priority program associated to the Case for which to retrieve the program worker based on a program hierarchy. At this stage, a program has already been determined. Use the resulting program to insert the TASK_PGM record to associate the Program to the Task that is being created.
   The Worklist pages in LRS/CalSAWS do not evaluate for the existence of a Task to Program association, so they will not be impacted. All other Task Management functionality being introduced within this design and in SCR CA-214929 that is reliant on a Task to Program association will then function appropriately.

   Developer Note: The above recommendation only applies to currently existing LRS/CalSAWS functionality that creates and assigns Tasks. Similarly, C-IV functionality that is being migrated into LRS/CalSAWS which only creates a Task to Program link but does NOT populate a TASK.CASE_ID column will need to be updated to begin populating the TASK.CASE_ID column ongoing. The result of these data relationships will allow Tasks to display on all the appropriate Task pages.

2.16 Task Reassignment Sweep Job

2.16.1 Overview

The Task Reassignment Sweep job is responsible for updating Task Reassignments statuses, deleting Task Reassignment results that are older than one year, and creating new Task transactions for active Task Reassignments. This section will outline the required modifications to implement the Task Reassignment batch sweep job.

2.16.2 Description of Change

1. Create a new daily batch job to sweep active Task reassignments that are scheduled for execution on the same batch run date. This sweep will be responsible for the following:

   a. Updating the Task Reassignment Status from 'Active' to 'Inactive' for one-time Task reassignments or recurring reassignments that have reached or passed the End Date of the recurrence.

   b. Deleting Task Reassignment results that are older than one year.

   c. Creating the transactions to be processed for active Task Reassignments that are scheduled for execution on the current day (same batch run date).

2. The new sweep will evaluate the Task Reassignment instructions to determine which instructions are scheduled to be executed each night. The sweep job will use the following logic for each Recurrence Frequency to determine if a Task Reassignment should be executed:

   a. One-time: Run if the Task Reassignment Recurrence Begin Date is today or in the past and the instruction has not been executed.

   b. Daily (M-F): Run if the Task Reassignment Recurrence Begin Date is today or in the past, and the End Date is today or in the future.

   c. Weekly: Run if the Task Reassignment Recurrence Begin Date is today or in the past, the End Date is today or in the future, and today has been selected as one of the Weekday(s) in the Recurrence section of the Task Reassignment Detail page.

   d. Every Other Week: Run if the Task Reassignment Recurrence Begin Date is today or in the past, the End Date is today or in the future, today has been selected as one of the Weekday(s) by the user in the Recurrence section of the Task Reassignment Detail page, and today is a Run Week. Run Week is defined as the week (Sunday – Saturday) that contains the Begin Date, and every alternate week after that week.

2.16.3 Execution Frequency

This sweep job will be scheduled to run daily for all LRS/CalSAWS System business days, excluding Sundays and Holidays.

2.16.4 Key Scheduling Dependencies

Schedule this batch job as a predecessor to the Task Reassignment Reclaim job.

2.16.5 Counties Impacted

All LRS/CalSAWS counties.

2.16.6 Data Volume/Performance

Approximately 100 to 200 records will be picked up by the sweep job daily.

2.16.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.17 Task Reassignment Reclaim Job

2.17.1 Overview

If a Task Reassignment is configured to Reclaim Assigned Tasks, a reclaim will be scheduled in the future based on the Task Reassignment Recurrence settings. This section outlines the required modification to implement the Task Reassignment Reclaim batch job.

2.17.2 Description of Change

1. Create a new daily batch job that will reclaim assigned tasks. The purpose of this job is to undo Task Reassignments for Tasks that remain assigned and unworked since the last occurrence of the reassignment instruction. The batch job will reclaim tasks based on Worker Position assignments and Bank assignments.

   The Task Reclaim processing allows reclaimed assigned tasks to be potentially reassigned to new workers or banks during the next reassignment.

2. Tasks will only be reclaimed if they meet the following criteria:
   a. The Task is still assigned.

b. The Task is still assigned to the worker or bank that the Task Reassignment process previously reassigned the task to. For example, if the task reassignment process reassigned a task to Worker A, the task must still be assigned to Worker A in order to meet this criterion.

3. If a Task Reassignment is configured to Reclaim Assigned Tasks, a reclaim will be scheduled in the future based on the Task Reassignment Recurrence settings. See Section 2.10.3.16.

For example, if the Task Reassignment is set to occur every Tuesday, the Task Reassignment will run on Tuesday and the reclaim will be scheduled on the following Tuesday. Once the reclaim has been scheduled, it does not get updated. If a Task Reassignment is not configured to Reclaim Assigned Tasks, batch will process as normal without scheduling a reclaim in the future.

2.17.3 Execution Frequency

This sweep job will be scheduled to run daily for all LRS/CalSAWS System business days, excluding Sundays and Holidays.

2.17.4 Key Scheduling Dependencies

Schedule this batch job to run after the Task Reassignment Sweep job and as a predecessor to the Task Reassignment threaded batch jobs.

2.17.5 Counties Impacted

All LRS/CalSAWS counties.

2.17.6 Data Volume/Performance

Approximately 100 to 1000 records will be picked up by the batch job daily.

2.17.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.18 Task Reassignment Execution Job

2.18.1 Overview

The Task Reassignment Execution job will be responsible for processing the Task Reassignments determined by the Task Reassignment Sweep. This

section outlines the required modification to implement the Task Reassignment Execution batch job.

2.18.2 Description of Change

1. Create a new daily threaded batch job to process active Task Reassignments and insert the result of the reassignment into a staging table. This process will insert the following information:
   a. Task ID
   b. Case Number
   c. Current Worker Position ID
   d. New Worker Position ID
   e. Current Bank ID
   f. New Bank ID

   This process will determine if any Task Reassignment execution will result in reassigning more than the maximum limit of 2500 tasks. These Task Reassignments will not be processed, and the Run Result will be marked as "Over Limit". The Run Result is available on the Task Reassignment Detail page in Results mode.

2. Create a new Task Reassignment Execution batch job to update task worker assignments according to the staged results produced by the Task Reassignment threaded batch jobs. This batch job will update the Tasks to have the resulting Worker/Bank assignments and log the appropriate results information on the task reassignment transact table to be viewed on the Task Reassignment Results List page and Task Reassignment Detail page in Results mode.

3. <u>Order of execution of Task Reassignment batch jobs:</u>
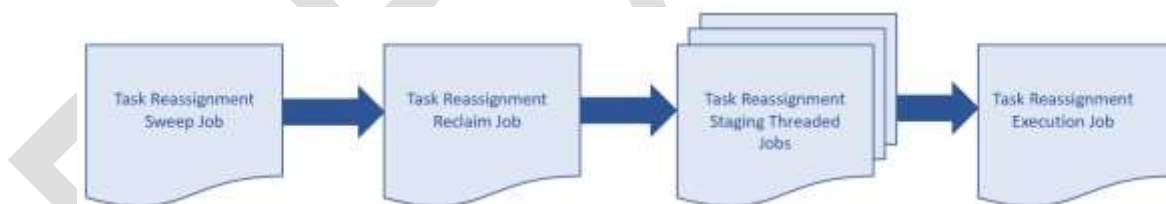
Figure 2.18.2.1 – Task Reassignment Batch Job Order of Execution

Note: The process outlined above will run concurrently with other batch processes that create tasks in the system. Tasks created after the reassignment process has completed will be evaluated for reassignment on the following business day.

4. <u>Task Reassignment Processing:</u>
   The execution of Task Reassignment instructions will result in reassigning a defined set of Assigned Tasks from their original Worker assignments to a new group of Workers.

Example:

- Supervisor Tom creates a new, one-time Task Reassignment in the LRS/CalSAWS System on Monday to run for the next day. His new reassignment instructions are set to reassign 5 Tasks from Bob (Task Source Worker) to Sally (Task Destination Worker).
- Batch runs that night and executes Tom's Task Reassignment resulting in moving 5 Tasks from Bob to Sally.
- The results of Tom's Task Reassignments are available in the LRS/CalSAWS System on Tuesday.

5. Task Reassignment Detail:
The following section provides additional detail into the batch logic required behind each option displayed on the Task Reassignment Detail Page.
   a. Task Source(s) – This section defines the sources within the organization to draw Tasks from. Batch will use Task Sources to determine the Source Worker(s), Source Bank(s) and/or Source Case(s) information associated with the Tasks to be reassigned.
   b. Reassignment Options – This section contains the reassignment options the user can use to filter tasks.
      i. The Primary Task Sort and Secondary Task Sort selection specify the order by which Tasks are reassigned (i.e., The Task with the highest priority will be reassigned first). Primary Task Sort will take precedence over the Secondary Task Sort. The following are the options for the sort criteria:
         - Due Date – Ascending: The Tasks with the lowest due dates will be reassigned first.
         - Due Date – Descending: The Tasks with the highest due dates will be reassigned first.
         - Created Date – Ascending: The oldest created Tasks will be reassigned first.
         - Created Date – Descending: The most recent created Tasks will be reassigned first.
         - Assigned Date – Ascending: The oldest assigned Tasks will be reassigned first.
         - Assigned Date – Descending: The most recent assigned Tasks will be reassigned first.
      ii. Reclaim Assigned Tasks – If a Task Reassignment is configured to Reclaim Assigned Tasks, a reclaim will be scheduled in the future based on the Task Reassignment Recurrence settings. See Section 2.17.2.
      iii. Number of Tasks – Defines a limit over the number of Tasks to be reassigned to Workers and Banks. This option works with the Task sort settings to determine which Tasks

will be included in the reassignment. The User can select one of the following options for the number of Tasks:

- • All Assigned Tasks: Reassign all Tasks identified from the Task Sources to the Destination Workers and Banks.
- • Maximum Number of Tasks: Reassign at most, a specific number of Tasks to the Destination Workers and Banks.
- • Percentage of Assigned Tasks: Reassign a specific percentage (rounded to the nearest number) of all Tasks assigned to the Destination Workers and Banks.
- • Number of Tasks Per Worker: Each Worker, in the "Destination Worker(s)" section, will receive at most the specified number of tasks. The number of tasks to be reassigned to Destination Banks will be limited by the number of Destination Workers multiplied by the number of tasks per Worker.

iv. Due Date – The Due Date filter determines if Tasks to be reassigned will be filtered by their Due Date. The Due Date can be set to one of the following options:

- • Any: All Tasks will be considered regardless of Due Date.
- • Past Due: Only Tasks with a Due Date prior to the Task Reassignment run date will be reassigned.
- • Next 7 Days: Only Tasks with a Due Date within the next 7 next calendar days of the Task Reassignment run date will be reassigned.
- • Next 30 Days: Only Tasks with a Due Date within the next 30 calendar days of the Task. Reassignment will be reassigned.
- • Custom: Only Tasks with a Due Date within a specific date range will be reassigned.

v. Task Priority – The Task Priority filter determines the priority of the Tasks to be reassigned. The Task Priority can be set to one of the following options:

- • Any: All Tasks will be reassigned regardless of Task priority.
- • Custom: Only Tasks selected within the specified Custom Task Priority will be reassigned.

vi. Task Types – The Task Types filter defines the Task Categories, Task Types and Task Sub-Types to be reassigned. Only Task Categories, Task Types and Task Sub-Types identified by the User will be reassigned. If no filters are defined, all Task Types will be included for reassignment. If a Task Type is identified, and no corresponding Task Sub-Types are identified, all Task Sub-

Types are identified, then all Task Sub-Types for that Task Type will be included in the reassignment. If a Task Category is identified, and no corresponding Task Types are identified, all Task Types for the selected Task Category will be included in the reassignment.

vii. Programs – This filter defines the Programs that are associated to the Tasks to be reassigned. Only the Tasks that are linked to the specified Program types will be reassigned. If no filters are defined, all Program Tasks will be included for reassignment.

c. Task Destination(s) – Task Destination defines the Destination Worker(s) and Destination Bank(s) information. Organization levels can be Workers, Units, Offices and/or Banks. Batch will use Task destinations to determine the Worker positions and Task Banks to distribute Tasks to, using the selected Reassignment Method. In the Destination Worker(s) and Destination Bank(s) section, the User can select either "Evenly Among Workers"/ "Evenly Among Banks" respectively, or "First Available Then Evenly."

Source workers that are identified in the Task Destination(s) panel (either directly or by way of Unit or Office) will only receive new Task assignments if the position meets all the following criteria:

- Position must be Active
- Position must have a current Staff member assignment as of the time batch is run
- Staff member must be Active (Full Time or Part Time)

Task Reassignment Method to Destination Worker(s)

i. **Evenly Among Workers**: Tasks will be reassigned to all the Workers identified in the "Task Destination(s)" list evenly, in round-robin fashion. This means the Workers on the receiving end will be assigned the same number of Tasks regardless of how many Tasks each Worker already has. The order of reassignment is defined by the Task Sort option; as high priority Tasks are distributed evenly among all Workers. The order one worker consistently being under- or over-assigned tasks.

Example – If there are 5 Tasks to be reassigned (Tasks: 1, 2, 3, 4, and 5) and there are 3 Workers to receive new Task Reassignment (Workers: Bob, Sally, and John). The reassignment process will result in:

Figure 2.18.2.2– Task Reassignment Method: Evenly Among Workers

ii. **First Available Then Evenly**: Tasks will be reassigned first to the Workers that have the least number of Tasks assigned. If the Workers have the same number of Tasks, new Tasks will be reassigned among these Workers evenly. The order of reassignment is defined by the Task Sort option; as high priority Tasks are distributed to Workers with the least Task workload first.

Example – If there are 5 Tasks to be reassigned (Tasks: 1, 2, 3, 4, and 5) and there are 3 Workers to receive new Task Reassignment (Workers: Bob, Sally, and John). Assuming these Workers have a number of old Tasks (Tasks: a, b, c, d, and e) the reassignment process will result in:

Figure 2.18.2.3 – Task Reassignment Method: First Available Then Evenly

Task Reassignment Method for Destination Bank(s)

i. **Evenly Among Banks**: Tasks will be reassigned to all the Banks identified in the "Destination Banks" list evenly, in round-robin fashion. This means the Banks on the receiving end will be assigned the same number of Tasks regardless of how many Tasks each Bank already has. The order of reassignment is defined by the Task Sort option; as high-ranking tasks are distributed evenly among all Workers. The order of Banks receiving Tasks will

be shuffled each time the instruction is run, to mitigate the possibility of one Bank consistently under- or over-assigned Tasks.

      ii. **First Available Then Evenly**: Tasks will be reassigned first to the Banks that have the least number of Tasks assigned. If the Banks have the same number of Tasks, new Tasks will be reassigned among these Banks evenly. The order of reassignment is defined by the Task Sort option; as high-ranking Tasks are distributed to Banks with the least number of Task first.

    d. Recurrence – This section defines the Task Reassignment frequency. The user can select one of the following frequencies to determine when a task is to be reassigned:

      i. One-time: Run if the Begin Date is today or in the past and has not been executed previously.

      ii. Daily (M-F): Run if the Begin Date is today or in the past, and the End Date is today or in the future.

      iii. Weekly: Run if the Begin Date is today or in the past, the End Date is today or in the future, and today has been selected as one of the Weekday(s) by the user.

      iv. Every Other Week: Run if the Begin Date is today or in the past, the End Date is today or in the future, today has been selected as one of the Weekday(s) by the user, and today is a Run Week. Run Week is defined as the week (Sunday – Saturday) that contains the Begin Date, and every alternate week after that week.

6. Task Reassignment Results:

    a. After running each Task Reassignment, Batch will log the following information for future reference.

      i. Run Result – The results status for the Task Reassignment are listed as follows:

- Processed – This means Tasks (at least 1) have been reassigned per instructions.
- Not Processed – This means no Tasks have been reassigned.

      ii. Run Result Detail – If the Run Result is Not Processed, additional details are captured in this field. The additional detail can be one of the following scenarios:

- Task Source(s) do not have Task Assignments – This means no Tasks were assigned to the Workers, Units, Offices, Banks or Cases identified in the Task Source(s) section.
- Number of Tasks to reassign is over limit – This means the task reassignment instructions specified more than 2500 Tasks for reassignment.

      iii. Run Date – The date the Task Reassignment was scheduled to execute.

<blockquote>
iv. Task Reassigned – The total number of Tasks that were reassigned, along with the individual Task IDs, and position information.
</blockquote>

2.18.3 Execution Frequency

The batch job will be scheduled to run daily, excluding Sundays and Holidays.

2.18.4 Key Scheduling Dependencies

Schedule the Task Reassignment Staging Threaded Batch job to run after the Task Reassignment Reclaim Batch job and a predecessor to the Task Reassignment Execution Batch job.

2.18.5 Counties Impacted

All LRS/CalSAWS counties.

2.18.6 Data Volume/Performance

Approximately 100 to 3000 records will be executed by the batch job daily.

2.18.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.19 Task Expiration Batch Job

2.19.1 Overview

The Task Expiration Batch job is responsible for identifying and expiring tasks that are associated to programs that have been closed, and have surpassed the County-specified expiration period. This section outlines the required modifications to implement the Task Expiration batch job.

2.19.2 Description of Change

1. Create a daily batch job to identify Tasks that are associated to programs that have been continuously closed for a number of days that match or exceed the configured expiration period for that Task Type.

2. Task Selection:

During the batch process, Tasks will be identified based on the following criteria:

    a. The Task is in "Assigned" status.

    b. The Task due date is less than the Batch Date.

    c. The Task is associated to a program that meets the following criteria:

       i. The effective program status is Discontinued, Denied, or Deregistered on the Batch Date.

       ii. The effective program status has been Discontinued, Denied, or Deregistered for a continuous period longer than, or equal to, the expiration period that has been configured for that Task Type.

       iii. The program does not have any assigned statuses going forward beyond Batch Date up to and through high date.

    d. The associated Task Type has a non-blank expiration period specified.

3. Task Outcome:

    a. Once the Tasks have been identified, the batch process will complete the following updates:

       i. Task status is updated to "Expired"

       ii. Task close date is updated to the Batch Date.

       iii. The Newly Assigned Indicator is removed from the Task.

4. Examples

    a. A Medi-Cal program is discontinued as of February 1, 2020, through high date. The County has configured Tasks of Type "Review" to expire 120 days after the program is closed.

       i. On the evening of June 1, 2020, the following program Tasks are updated.

ID	Task Type	Due Date	Task Status	New Task Status
1	Review	10/1/2018	Completed	Completed
2	Review	10/1/2019	Assigned	**Expired**
3	Batch Eligibility	10/1/2019	Completed	Completed
4	Images Awaiting Review	6/1/2020	Assigned	Assigned

    b. A Medi-Cal Program is discontinued as of February 1, 2020. The program status is updated to 'Pending' as of August 1, 2020.

i. Expiration batch runs and no program Tasks are updated as there is a non-closed program status for the program after the batch date.

5. Deactivate the LRS/CalSAWS Task Expiration Batch Job (PB19A270).

2.19.3 Execution Frequency

This sweep job will be scheduled to run daily for all LRS/CalSAWS System business days, excluding Sundays and Holidays.

2.19.4 Key Scheduling Dependencies

Schedule this batch job to run as a predecessor to the Task Reassignment Sweep job.

2.19.5 Counties Impacted

All LRS/CalSAWS counties.

2.19.6 Data Volume/Performance

Approximately 100 to 3000 records will be expired by the batch job daily.

2.19.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.20 Task Newly Assigned Indicator Job

2.20.1 Overview

The Task Newly Assigned Indicator Job is a batch process that clears the Newly Assigned Indicator on Tasks once their assigned date has aged passed a certain period. This section outlines the required modifications to implement the Task Newly Assigned Indicator Job.

2.20.2 Description of Change

1. Create a daily batch job to clear the Newly Assigned Indicator on Tasks once their assigned date has aged past a certain period. This period is 5 days by default, but can be updated by each County, for each Task Type in the Task Type Detail page (See Section 2.3).

a. Task Selection:

During the batch process, Tasks will be identified based on the following criteria:

   i. The difference between the Batch Date and the Task Assignment Date is greater than or equal to the number of calendar days specified in the Newly Assigned Indicator field for the Task Type.

   ii. The current Newly Assigned Indicator on the Task is set to 'Y'.

b. Task Outcome:

Once the Tasks have been identified, the batch process will remove the Newly Assigned indicator from the selected Tasks. This batch process will not enter Task History records for the removal of the Newly Assigned Indicator.

Example: The Newly Assigned Indicator field is set to 10 days for "Review" Task Types. A "Review" Task that is assigned to a Worker on January 3rd will display an exclamation point on the Task Search page through January 13th. On January 14th, the exclamation point will no longer display.

2.20.3 Execution Frequency

This sweep job will be scheduled to run daily for all LRS/CalSAWS System business days, excluding Sundays and Holidays.

2.20.4 Key Scheduling Dependencies

Schedule this batch job to run after the Task Reassignment batch process has completed.

2.20.5 Counties Impacted

All LRS/CalSAWS counties.

2.20.6 Data Volume/Performance

Approximately 100 to 100,000 records will be updated by the batch job daily.

2.20.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.21 Data Change – Create Bank Entries from Master Assignment Queues (MAQ)

2.21.1 Overview

The LRS/CalSAWS System contains a "Case Load" indicator on the Position Detail Page with two options:

  a. Traditional
  b. Master Assignment Queue

Master Assignment Queue (MAQ) functionality will be replaced by the Bank functionality.

2.21.2 Description of Change

1. Create Bank entries in the LRS/CalSAWS System based on Master Assignment Queue Positions.

    a. The base population of MAQs to be loaded as Banks will be Active positions with a Case Load value of "Master Assignment Queue" on the Position Detail page.

    b. The following attributes will be created for the Bank

BANK Database Table Column	Bank Detail Page Attribute	Value
COUNTY_CODE	N/A	The County Code of the MAQ Position
OFFICE_ID	Used to display the Office Name value of the Bank.	The Office ID of the MAQ Position
UNIT_ID	Used to display the Unit ID of the Bank	The Unit ID of the MAQ Position
BANK_NAME	Used to display the Bank Name	The Worker ID of the MAQ with " MAQ" added to the end. For example, a MAQ with Worker ID "19YYBB0301" will result in a Bank Name of "19YYBB0301 MAQ".
BANK_NUM	N/A	The POS_NUM_IDENTIF of the MAQ Position

BANK_NUM_IDENTIF	Used to display the Bank ID	The worker number of the original MAQ with "BK" added to the end. For example, a MAQ with Worker ID "19YYBB0301" will result in a Bank ID of "19YYBB0301BK".
ASSOC_POS_IND	Used to display the Associate All Positions In Unit and Office value	Will be initially loaded as "Y"

    c. The Position Detail page includes a Tasks section which allows users to select one or more Task Categories to be associated to the MAQ. For each Task Category associated to a MAQ that has been loaded into the BANK table, add the appropriate Task Category entries into the BANK_TASK_CATGRY table.

2. Reassign Tasks that are assigned to MAQs to now be assigned to the appropriate Bank.

    a. Retrieve the population of MAQ assigned Tasks that are in a status of "Assigned" and populate the BANK_ID column for the Task with the appropriate Bank that was created with the previous data change step. Once the BANK_ID column is populated, update the POS_ID column to be null as a Task cannot be assigned to a Position and a Bank at the same time.

    Note: Tasks that are not in an "Assigned" status will remain assigned to the legacy MAQ positions as these Tasks have reached an end state.

2.21.3 Estimated Number of Records Impacted/Performance

Between 100 and 200 Master Assignment Queue records in LRS/CalSAWS will be converted to Banks. The count of entries into the BANK_TASK_CATGRY table will be approximately twice the amount of Banks that will be created. Approximately 115,000 Tasks will be reassigned to Banks from MAQs.

2.22 Automated Regression Test

2.22.1 Overview

Create new automated regression test scripts to verify a subset of the Task Type, Automated Action, and Bank functionality.

Note: Task Reassignment is excluded due to the batch dependency required for complete testing. The Worklist pages are also excluded due to the complexity of the functionality (esp. the "Get Next" logic) during subsequent script runs with previous data still in place.

2.22.2 Description of Change

1. Create new regression test scripts to verify the following Task Type functionality:
   a. Add, edit, remove, search, and view through the Task Type List and Detail pages, including:
      i. Checkbox availability (for removal), and lack thereof when an associated Task record exists
      ii. Available Online: Visibility on the Task Detail page
      iii. Available for Automation: Visibility on the Automated Action Detail page
      iv. Validations:
         1. "Remove" validation when an associated Task exists
         2. "Remove" validation when an associated Automated Action exists
         3. "Available for Automation" when deselecting this option and an associated Automated Action exists
   b. Sub-Type: Add, edit, remove, view, including the Task Type points (i-iv) above
      i. Available Online and Available for Automation
         1. Additional sub point (if needed)
2. Create new regression test scripts to verify the following Automated Action functionality:
   a. Search, view, deactivate, reactivate actions of type "Create Task"
   b. Edit actions of type "Create Task" in the following ways:
      i. Add Sub-Type
      ii. Remove Sub-Type
      iii. Update "Initial Assignment" to Bank

        iv.   Update "Initial Assignment" to Program Worker

        v.   Validations:

                1.   "Program Worker" validation for "No Program Worker" and no Bank ID

                2.   "Bank ID" validation for invalid value

3. Create new regression test scripts to verify the following Bank functionality:

   a. Add, edit (see below), search, view

   b. Task Categories:

        i.   Create a bank with no Task Categories selected

        ii.   Create a bank with Task Categories selected

        iii.   Edit a bank to add one or more Task Categories

        iv.   Edit a bank to remove one or more Task Categories

   c. Additional Associations:

        i.   Create a bank with no Additional Associations selected

        ii.   Create a bank with Additional Associations selected

        iii.   Edit a bank to add one or more Additional Associations

        iv.   Edit a bank to remove one or more Additional Associations

   d. Excluded Associations:

        i.   Create a bank with no Excluded Associations selected

        ii.   Create a bank with Excluded Associations selected

        iii.   Edit a bank to add one or more Excluded Associations

        iv.   Edit a bank to remove one or more Excluded Associations

   e. Validations:

        i.   "Additional Associations" for "Add" with incomplete record in progress

        ii.   "Excluded Associations" for "Add" with incomplete record in progress

        iii.   "Excluded Associations" for same entry in "Additional Associations" and "Excluded Associations"

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix	CA-214928 DDID 34 Security Matrix.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
34	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: 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	- 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.	This design incorporates many new online pages to serve as the base for the Unified Task Management solution that will support both C-IV and LRS/CalSAWS System Task Management functionality.

caseworker 7) Update the LRS Task Management Dashboard (OBIEE) to account for the system modifications being made as part of migration		

5   MIGRATION IMPACTS

N/A

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

6   OUTREACH

N/A

7   APPENDIX

7.1   This is the list of programs that are considered Intake or External that is current as of 20.05 release. These options are presented in the Program section of the Task Reassignment Detail page:

- AAP
- Adult Protective Services
- CAPI
- CFET
- Cal-Learn
- CalFresh
- CalWORKs
- Child Care
- Child Protective Services
- Diversion
- Foster Care
- GROW
- General Assistance/General Relief
- Homeless - Perm
- Homeless - Temp
- IHSS/CMIPS II
- IV-D Child Support
- Immediate Need
- Kin-GAP
- LIHP
- Linkages Adult Services
- Medi-Cal
- Multipurpose Senior Services
- Nutrition Benefit
- PCSP
- RCA
- REP
- Welfare to Work