

## CalSAWS | Notes from Task Management Committee

Date: September 3, 2020	Notes Location:	
Time: 1:00pm-5:00pm	Meeting Materials:	Email sent 8/25/2020: Agenda – Task Management Appendix – Task Management Requirements CA-21498 – Task Management – DDID 34 CA-214929 – Task Management – DDID 655 CA-214893 – Task Management – DDID 1628 CA-214899 – Task Management – DDID 1629
Meeting Called by: Sarah Cox		

Attendees: Region 1: Jessica Sutherland, Lorena Moran, Marco Frias, MyLynn Bui, Terri Rose  
 Region 2: Christopher Craig, Shawna Reed  
 Region 3: Andrea Broughton, Melody Raudman  
 Region 4: Aaron Gomes, Ignacio De La Cruz, John Garcia, Neil Stambaugh  
 Region 5: Hillary Beeler, Jenifer Rodriguez, Lorraine Simpson-Hargrove, Melissa Billedo  
 Region 6: Gaston Herrera, Irene Jimenez, Latrice Anderson, Mario Palacios, Sergio Andrade

Regional Managers: Daisy Villasenor, Ayana Alvarez, JR Dessai, Martha Zepeda, Lorena Montes, Monica Gonzalez  
 Project North: Gabe Trejo, Justin Dobbs, Pandu Gupta, Matt Lower, Amanda Hajj  
 Project South: Carlos Albances, Dymas Pena  
 State Partners: Sherice Sterling

### Topic

### Important Points

Welcome/Roll Call

**Release 20.11 – Design walk-thru  
DDID 34-**

- Convert Master Assignment Queue positions and related tasks to Task Banks.
- Add county customization of Task Types/Sub-Types and configuration of Automated Actions.
- History of changes will be captured for Task Assignment Detail page (Similar to the way there is a history of Task edits completed by users in Tasks)
- Nothing will change regarding schedule re-assignment during the day.
- Tasks can be reassigned to a bank and that bank can redistribute them to staff via round robin.
- Cases can be flagged as confidential but individual tasks cannot be flagged.
- Task Reassignment in C-IV is located at: Tools > Admin > Task Reassignment
- LRS currently has task reassignment logic that allows you to reassign task from 1 worker to another.
- When reassigning the case, the task will follow to the case.

## Topic

## Important Points

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### DDID 655-

- Existing MAQs should be made read only once converted, rather than deleted.

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### DDID 1628-

- New dedicated Task pages will allow access to independent pop-up windows through the Utilities Navigation Bar.
- There is an interest in the functionality to open more than one pop-up Task List at a time. An enhancement request would be needed to initiate that change.
- Case hyperlink from the My Tasks page will change the window.
- A Task Status cannot be changed once completed.

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### DDID 1629-

- Migrate a population of existing C-IV Automated Tasks into the LRS/CalSAWS Automated Action framework.
  - Counties can configure Task types individually.
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- Modify a population of existing LRS/CalSAWS Automated Tasks to function in the Automated Action framework.

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### Release 21.03 – Imaging/Documents Task design

- Overview of Imaging related Task solutions including configurability.
- Customers will be able to upload documents via the CalSAWS portal.
- Customers will have access to kiosks to load documents.
- The new Portal/Mobile goes live 09/2021.
- Recommendation to have joint meeting with Task Management and Imaging Committees to discuss design and exchange information. This will ensure both Committees are receiving the same information.
- There is a hierarchy for Task assignment to support multiple programs starting with Cash Programs.
- Option to suppress tasks when there is an upcoming appointment.
- Option to suppress tasks when the imaging worker is the case carrying worker.
- Option to append to open tasks.

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### Action Items-

- Confirm for LRS/CalSAWS – Is there a database trigger that updates tasks when the program worker is changed?

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**Next Committee Meeting is November 5th**