

SOR Requirements 112519

DDID #	Category	Subcategory	Requirement Language	Contractor Assumptions
2340	General Requirements	APIs	The CONTRACTOR shall create a service allowing 58 Counties to retrieve activities utilizing a CalSAWS API. The service will allow the 58 Counties to do the following: 1) Search for activities service type, location, dates, activity type and date. When a specific activity instance is identified, the service will return a list of participants within the instance of the activity. 2) Search for activities associated to a particular person with filters for activity type and status.	
2341	General Requirements	APIs	The CONTRACTOR shall create a service allowing 58 Counties to retrieve activity agreements and the associated activities utilizing a CalSAWS API. The service will allow the 58 Counties to search for activity agreements by a case and person. The service will return a list of activity agreements and any associated activities to the agreement.	
2342	General Requirements	APIs	The CONTRACTOR shall create a service allowing 58 Counties to retrieve, update, and create appointments utilizing a CalSAWS API. The service will allow the 58 Counties to do the following: 1) Search for scheduled appointments by EBT card number, case number, Document ID, person information and appointment type, worker number date, and status. The service will return a list of appointments based on the search parameters provided by the user. When searching by date or status a worker number, case number, or person information will be required. 2) Allow users to update the status of an appointment and create new appointments based on identified worker availability from a separate worker schedule API. This API will update and create appointments when called utilizing required data elements as specified by the CalSAWS Software.	
2343	General Requirements	APIs	The CONTRACTOR shall create a service allowing 58 Counties to retrieve barrier information utilizing a CalSAWS API. The service will allow the 58 Counties to search for participant barriers by case or person. An optional filter for barrier type will be available. The service will return a list of barriers for the case or person.	
2344	General Requirements	APIs	The CONTRACTOR shall create a service allowing 58 Counties to view EBT cards for a case utilizing a CalSAWS API. The service will return all EBT Cards and related information when a specific case is provided.	
2345	General Requirements	APIs	The CONTRACTOR shall create a service allowing 58 Counties to update documents to be received utilizing a CalSAWS API. This service will update the status of documents to received when called utilizing required information as specified by the CalSAWS Software.	
2346	General Requirements	APIs	The CONTRACTOR shall create a service allowing 58 Counties to retrieve a list of documents associated to a Case and their corresponding meta-data utilizing a CalSAWS API. This service will return a list of documents uploaded to the imaging solution when it is called utilizing a case id as a parameter. Additional filters, such as image category, will be defined during design.	
2347	General Requirements	APIs	The CONTRACTOR shall create a service for the 58 Counties that returns all issuances for a provided case utilizing a CalSAWS API. The service will allow users to filter by program, benefit month, issuance category, and pay code. The service will return a list of issuances for the provided case that meet the filtering criteria.	
2348	General Requirements	APIs	The CONTRACTOR shall create a service for the 58 Counties that returns all journal entries for a specific case. The service will allow users to filter by case number, date, journal category and journal type. A list of all journal entries that meet the search criteria will be returned.	
2349	General Requirements	APIs	The CONTRACTOR shall create a service for the 58 Counties that returns person information utilizing a CalSAWS API. The service will allow the 58 Counties to search for individuals utilizing a person id, case number, or demographic information such as first name, last name, date of birth, and SSN. A list of people matching the search criteria will be returned including individual demographic information, address information, contact information, special circumstances (accommodations), and income information.	
2350	General Requirements	APIs	The CONTRACTOR shall create a service for the 58 Counties that returns program information utilizing a CalSAWS API. The service will allow the 58 Counties to do the following: 1) Search for programs associated to a case by providing a case number 2) Search for all programs associated to an individual with a provided social security number The service will return a list of programs that meet the provided criteria including the case, program type, program status, program status reason, the individuals on the program, the individual program person status and status reason, the phone numbers for the individuals, and the worker associated to the programs.	
2351	General Requirements	APIs	The CONTRACTOR shall create a service for the 58 Counties that returns all reception log records utilizing a CalSAWS API. The service will have filters for case, office location, date, and status. If a case is not provided, the office, date and status filters will be required to be provided.	
2352	General Requirements	APIs	The CONTRACTOR shall create a service for the 58 Counties that returns, updates, and creates tasks utilizing a CalSAWS API. This service will return a list of tasks for a specific case. Additional filters for task type, task status, program, and due date will be available when returning tasks. This API will update and create tasks when called utilizing required data elements as specified by the CalSAWS system.	
2353	General Requirements	APIs	The CONTRACTOR shall create a service for the 58 Counties that returns time limit information utilizing a CalSAWS API. The service will return the months used for the 24 Month, 48 Month, and 60 Month time clocks. Counties can use this service to search for time clocks by case number or person ID. When searching by case, a list of all adults on the case with time clocks will be returned.	
2354	General Requirements	APIs	The CONTRACTOR shall create a service for the 58 Counties that returns verification information utilizing a CalSAWS API. The service will allow the 58 Counties to search for verifications by case, person, and status. A list of verifications meeting the search criteria will be returned and the information returned will be limited to the individual, verification type, and status.	
2355	General Requirements	APIs	The CONTRACTOR shall create a service for the 58 Counties that returns work registration status utilizing a CalSAWS API. This service will return if an individual is a mandatory, voluntary, or exempt participant for a specified person or case. Additional filters for work registration type, begin date, and end date will be available.	
2356	General Requirements	APIs	The CONTRACTOR shall create a service for the 58 Counties that returns worker information utilizing a CalSAWS API. The service will return specific worker information when a worker number is provided including the worker name, classification title, phone number, email address, supervisor, supervisor phone, and supervisor email.	
2357	General Requirements	APIs	The CONTRACTOR shall create a service for the 58 Counties that returns, updates and creates a worker schedule utilizing a CalSAWS API. When a worker number, begin date and end date is provided, the service will return the worker schedule between the specified begin and end date including the availability and scheduled appointments over fifteen-minute increments. The begin and end date filters will be limited to seven days. Worker schedules can be updated or created utilizing the API and including all required information as specified by the CalSAWS.	
2358	General Requirements	APIs	The CONTRACTOR will include a third party API gateway that acts as an intermediary façade layer in between the 58 Counties and the CalSAWS Software. The API gateway shall allow pre-approved API Consumers to access the APIs over the internet. The API Consumers will have to go through an approval process with the Consortium and create an account to obtain API keys. Functionality of the API gateway will include Security, Mediation, Routing and Traffic Management services and Health Monitoring.	System Test will not validate this requirement and no hours have been included for the test team
2359	General Requirements	APIs	The CONTRACTOR shall develop the API Solution documentation, accessible from the API gateway's built-in developer portal functionality, which includes: 1) General description of the entire API Solution and business objects 2) Provide simple getting started descriptions and code examples 3) Document each API call separately, with parameters and their values explained (Example available at https://stripe.com/docs/api) 4) Provide examples of each call being made accompanied with details about the requests and responses 5) Adopting a menu of links for easy navigation (https://stripe.com/docs/api) 6) Explain and exemplify request headers, API responses and error codes 7) Provide developers with the ability to make live calls from the documentation page 8) Create one clear code example for authentication and making a call in the Java, C# and Python programming languages 9) Create clear example code for general use cases in the Java language 10) Provide a downloadable set of API descriptions in PDF, CSV and Open API specification Ongoing maintenance of the API Solution documentation will be included as part of future maintenance and enhancement efforts."	System Test will not validate this requirement and no hours have been included for the test team
2360	General Requirements	APIs	The CONTRACTOR shall maintain the APIs using industry standard versioning techniques; i.e. /v1/, /.../.	System Test will not validate this requirement and no hours have been included for the test team
2361	General Requirements	APIs	The CONTRACTOR shall require all API developer's applications to utilize OAuth2, or other standard as approved by the Consortium, to authenticate with the API gateway.	System Test will not validate this requirement and no hours have been included for the test team
2362	General Requirements	APIs	The CONTRACTOR shall create logical applications in the API gateway to combine lower level services for the API specifications agreed upon by the 58 Counties.	System Test will not validate this requirement and no hours have been included for the test team
2363	General Requirements	APIs	The CONTRACTOR shall implement the REST APIs in a stateless manner. Each request from client to server must contain all of the information necessary to understand the request, and cannot take advantage of any stored context on the server. Session state is therefore kept entirely on the client.	System Test will not validate this requirement and no hours have been included for the test team
2364	General Requirements	APIs	The CONTRACTOR shall implement the REST APIs to return XML, JSON and Text representations as specified by the API developers in the REST invocation. Each REST call shall allow the return type to be specified using the query string and/or accept headers.	System Test will not validate this requirement and no hours have been included for the test team
2365	General Requirements	APIs	The CONTRACTOR shall implement the REST APIs to return an error object in case of an error. In the case of more than one error, a general error code will be returned along with an array of errors detailing each error case. Error objects shall include a numeric error code and an English string describing the error. Transient errors should be noted with a "retry your request" message.	System Test will not validate this requirement and no hours have been included for the test team
2366	General Requirements	APIs	The CONTRACTOR shall require all communication with the REST APIs to be secured by Transport Layer Security (TLS 1.2 or successor) to protect the privacy and integrity of data in transit through the API gateway. This encryption includes communication with all backend services and all API consumers. Port 80 communication will be prohibited.	System Test will not validate this requirement and no hours have been included for the test team
2367	General Requirements	APIs	The CONTRACTOR shall provide an API solution that maintains an audit trail of all API actions, including request and response objects, and shall maintain all records according to the data retention policies of the Consortium.	System Test will not validate this requirement and no hours have been included for the test team
2368	General Requirements	APIs	The CONTRACTOR shall provide an API solution that supports API governance including throttling. The API solution shall support usage throttling on a per API and per Consumer basis to support service level tiers to regulate request volumes and prevent the API platform from being overwhelmed with requests of one or more APIs or from one or more Consumers. The service level tiers for each Consumer will be defined by the Consortium.	System Test will not validate this requirement and no hours have been included for the test team
2369	General Requirements	APIs	The CONTRACTOR shall provide an API gateway solution that includes Web Application Firewall functionality such as denial of service attack protection (DDoS), rate limiting and spike protection.	System Test will not validate this requirement and no hours have been included for the test team
2370	General Requirements	APIs	The CONTRACTOR shall provide an API solution that supports the ability to monitor traffic, API usage, error rates, response times, error data and error logs (reports) from the portal to perform needed troubleshooting, analysis, statistics, and reporting.	System Test will not validate this requirement and no hours have been included for the test team
2371	General Requirements	APIs	The CONTRACTOR shall provide a external development environment for the purpose of API developers creating and testing their applications using production data. In addition, this external development environment will be used as a place for developers to see and test new API functionality. The data shall be redacted such that no PII details are provided.	System Test will not validate this requirement and no hours have been included for the test team
2372	General Requirements	APIs	The CONTRACTOR shall provide an API gateway solution that includes a caching layer designed to insulate the application and database servers from paging and repeated operations.	System Test will not validate this requirement and no hours have been included for the test team

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2373	General Requirements	APIs	<p>The CONTRACTOR shall develop automated regression test scripts to verify data retrieval through each of the following APIs in the non-prod test environments:</p> <ol style="list-style-type: none"> 1) Activities 2) Activity Agreements 3) Appointment 4) Barriers 5) Case 6) EBT 7) Documents 8) Imaging 9) Issuance 10) Journal 11) Person - MDM 12) Person 13) Program 14) Reception Log 15) Service Arrangement 16) Task 17) Time Limits 18) Verifications 19) Work Registration 20) Worker Info 21) Worker Schedule <p>The scope will be limited to positive testing of no more than 12 data points through no more than 5 authenticated requests per API. Responses will be verified in a single format across all APIs (one of: JSON, XML, Text).</p>	<ol style="list-style-type: none"> 1) This requirement includes the drafting of the regression scripts, online, and technical team support. 2) There will not be a separate UAT effort or testing with individual county ancillary systems.
2297	General Requirements	APIs	<p>The CONTRACTOR shall create a service allowing 58 Counties to retrieve case information utilizing a CalSAWS API. The service will allow the 58 Counties to search for cases by case number, EBT card/account number, individual demographic information, or participant phone number. The service will return a list of cases and a list of people on the case including individual demographic information and contact information. The case level information will return any confidentiality indicators associated to the case and case flags.</p>	
2298	General Requirements	APIs	<p>The CONTRACTOR shall update the Master Data Management (MDM) API to utilize the CalSAWS API framework. The API will be updated to include additional individual demographic information, which will be identified during design sessions. The MDM API will be updated to allow for optional filters including program and program status. The MDM will return a list of changed, new or deleted individuals based upon a timestamp field. No data will be tracked longer than 72 hours. The 58 Counties have the option to opt in or opt out of the MDM API.</p>	<ol style="list-style-type: none"> 1) Event streaming will be utilized to capture new people or changes to people known to the system. 2) A web service will be created that will read data captured from even streaming that is stored in memory 3) The existing LA County MDM solution and batch processes will be updated to utilize this new framework for event streaming and person API.
2301	General Requirements	APIs	<p>The CONTRACTOR shall create a service for the 58 Counties that returns service arrangements utilizing a CalSAWS API. Filters for need category, need type, need date, and service begin and end dates will be available. The service will return a list of service arrangements for a specified case including need information that meet the filter criteria.</p>	

DDID #	Updated DDID?	Category	Sub-Category	Short Name	Requirement	Hours	Assumptions
					The CONTRACTOR shall update the Error Prone and High Risk Case Flag Administration page, and supporting batch processing, to be configurable by each CONSORTIUM County. The CONTRACTOR shall add a new configurable automated task to generate when an Error Prone or High Risk flag is added to a case.		
DDID 1439	FALSE	Task Management	Create Tasks	Error Prone and High Risk Tasks		420	-
DDID 1628	FALSE	Task Management	Create Tasks	Migrate C-IV Automated Actions	The CONTRACTOR shall migrate the existing C-IV automated tasks, as specified in the "Task Management C-IV Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as migrate current task configurations for 39 C-IV Migration Counties into the CalSAWS Software as default settings for the 39 C-IV Migration Counties. The CONTRACTOR shall update the existing LRS automated tasks, as specified in the "Task Management LRS Automated Task Inventory" appendix, into the CalSAWS Software for all 58 Counties; as well as update current task configurations for Los Angeles County into the CalSAWS Software as default settings for Los Angeles County. The CONTRACTOR shall update the name, long description and associated trigger for the task "Activity will end in 5 days" to reference 10 days instead of 5 days. The CONTRACTOR shall update the long description of the task, "Retro Active Extender" from "Notify eligibility worker of retroactive extender" to "Retro Active extender has been approved. Take appropriate action. <months the extender has been approved for>". The CONTRACTOR shall update the task name from "SSS Activity with no Concurrent Activity" to "Specialized Supportive Services Activity with no Concurrent Activity". The CONTRACTOR shall create automated tasks for MEDS alerts specified in the "MEDS Alert Message Inventory" appendix, that are received by the CalSAWS Software and do not generate tasks currently. The automated tasks from MEDS alerts must be county configurable to allow authorized users to enable or disable the individual tasks. The CONTRACTOR shall add the ability for authorized users to create tasks in bulk by uploading a spreadsheet with task details. Users must have the following features available to them: 1) A pre-defined template available for download and modification to then upload for task creation 2) The ability to assign tasks directly to a named worker/bank, or assign tasks automatically based on existing task routing rules 3) The ability to create different types of tasks in the same upload 4) The ability to specify a due date for each task, or have the system determine one based on the task type specified 5) A confirmation page for viewing errors occurring during task creation 6) A preview assignment page to view assignment results prior to distributing tasks 7) A threshold for number of entries to be processed in real time, with higher volumes processed during nightly batch The CONTRACTOR shall update the Task Management solution to allow authorized users to flag an individual task as "Expedited" when the task is created or after the task has been assigned.	2995	- Approximately 22 C-IV automated actions directly overlap with LRS automated tasks. - Support for mapping CalWIN automated tasks to C-IV automated tasks is not included. - Automated tasks included in this DDID would start as "inactive" for CalWIN counties. - Existing thresholds for authorization based tasks will remain the same, and threshold amounts will not be configurable by county. - Support for mapping CalWIN automated tasks to LRS automated tasks is not included. - Automated tasks included in this DDID would start as "inactive" for CalWIN counties.
DDID 1629	FALSE	Task Management	Create Tasks	Update LRS Automated Tasks to Automated Actions		3860	-
DDID 1830	FALSE	Task Management	Create Tasks	Automated Action Update		55	-
DDID 1831	FALSE	Task Management	Create Tasks	Automated Action Update		0	- This requirement will be met with the implementation of DDID 1629 as the LRS Automated Tasks are initialized.
DDID 1832	FALSE	Task Management	Create Tasks	Automated Action Update		0	- This requirement will be met with the implementation of DDID 1629 as the LRS Automated Tasks are initialized.
DDID 1955	TRUE	Task Management	Create Tasks	Add Remaining MEDS Alerts as Tasks		0	- This requirement will be met with the implementation of DDID 1964 and Automated Action funds drawn from DDID 1967.
DDID 2197	FALSE	Task Management	Create Tasks	Bulk Spreadsheet Tasks		3390	- Threshold for real time task creation is limited to 50 at the time of implementation.
DDID 2209	FALSE	Task Management	Work Tasks	Expedite Tasks		455	-
DDID 2225	FALSE	Task Management	Reassign Tasks	Worker Assignment Preview	The CONTRACTOR shall update the Task Management solution manual assignment pages so that the user can see a targeted list of staff eligible to receive the task assignment, prioritized in the order for which the Task Management solution uses to assign tasks automatically. This feature must be configurable to be enabled or disabled by county administrators. The CONTRACTOR shall update the Appointment Management solution to create a task whenever an appointment is created. The task should be assigned to the same worker to whom the appointment is assigned, and the description should include the basic appointment information. When the appointment or the task is reassigned, then the corresponding task or appointment is reassigned as well. This functionality must be configurable by county administrators. The CONTRACTOR shall add the ability for authorized users to upload county death and jail information to identify matching persons, and generate tasks for users to review matches and take appropriate action. Three templates must be available for download to support the following processes: 1) County Death Match 2) Jail Incarceration Match 3) Jail Release Referral	515	-
DDID 2228	FALSE	Task Management	Create Tasks	Auto Tasks for Appointments	Each template must be available for download and modification to then upload for matching and task creation. Person matching must be based on name, date of birth, social security number, and CIN if available. A threshold must be established during design for the maximum number of tasks being created to be processed in real time, with higher volumes processed during nightly batch. The CONTRACTOR shall update the Task Management solution to allow manual task creation without a case or application reference. Tasks must be accessible through the My Task, Task Search, and Worklist pages using existing search criteria. The CONTRACTOR shall update the Task Detail page to add a button for viewing documents associated to the task and documents received within a time period after the task was created. The images button must remain accessible on the Task Detail page, regardless of task status. The CONTRACTOR shall update the Task Management solution to reduce the number of tasks automatically distributed to staff based on availability reflected in their appointment and worker schedules. The CONTRACTOR shall update My Task, Task Search, and Worklist page so that a user can search for tasks by program status(es) and corresponding status effective date. The CONTRACTOR shall update the Task Management solution to allow county administrators to define action steps for each task type that need to be completed or followed up on by workers. By default, workers must complete the action steps before marking the task complete. The solution must allow authorized workers to bypass the action steps and mark the task as complete. The CONTRACTOR shall update the Task Management solution to allow authorized users to configure task routing rules for images/documents based on program and program status. The CONTRACTOR shall update the Task Management solution to allow users to search for tasks by keyword in the Long Description field of the task, search by the user that created the task, or created on date range. The CalSAWS Software will validate that the search scope is sufficiently small and demand greater specificity before running the search on too many tasks. The CONTRACTOR shall update the Task Management solution to allow authorized users to specify which types of tasks should append to existing/open tasks before creating a new task. The user must be able to specify which types of tasks the new task can be appended to. The assigned worker must be alerted when their task is updated with additional documents. The CONTRACTOR shall update the Task Management solution to allow users to subscribe to a task. The subscribed users must be able to view a consolidated list of task updates as they happen in near real-time. The subscribers of a task must be viewable within the task detail page. The CONTRACTOR shall update the Task Management solution to allow authorized users to configure a task type to generate a new task upon completion. The CONTRACTOR shall update the Task Management solution to allow authorized users to define and schedule a periodic sampling of tasks. The periodic task sampling results must be viewable to the user that requested it.	855	- Appointments that are reassigned via the Appointment API will also result in task reassignment if the county has elected to use this functionality.
DDID 2230	FALSE	Task Management	Create Tasks	Death and Jail Match		1440	- This DDID will be implemented after, or at the same time as, DDID 2197 as it assumes leveraging components developed in that DDID. - There is no associated supervisor workflow for tasks that do not have a case or application reference.
DDID 2233	TRUE	Task Management	Create Tasks	Referral Based Tasks (No Case or Application)		850	- This DDID is implemented after, or at the same time as, DDID 655.
DDID 2235	FALSE	Task Management	Work Tasks	View Image Button on Tasks		540	- Imaging system will support single sign on functionality for CalSAWS credentials.
DDID 2239	FALSE	Task Management	Assign Tasks	Appointment and Availability for Task Distribution		615	- Automated task assignment reductions apply to automated distribution in a push model only. Staff is able to self assign, and manually reassign, tasks without restriction.
DDID 2240	FALSE	Task Management	Work Tasks	Highlight Tasks for Discontinued Cases		180	-
DDID 2241	FALSE	Task Management	Work Tasks	Task Action Steps		1260	- Task Reports do not require updates to include action steps upon implementation of this DDID. Report enhancements to be requested via CER after implementation.
DDID 2245	TRUE	Task Management	Assign Tasks	Program and Program Status Based Task Routing		750	-
DDID 2246	FALSE	Task Management	Work Tasks	Expanded Task Search		180	- Assuming current requirement for minimum search criteria of Case Number, Office, Unit, or Worker is sufficient to contain search scope.
DDID 2247	FALSE	Task Management	Create Tasks	Document Scan Updates Existing Task		600	- Implementation of this DDID will leverage display built in DDID 2249 as a mechanism to alert a worker their task has been updated.
DDID 2249	FALSE	Task Management	Work Tasks	Watch a Task		650	- Solution will leverage current Task History model to display task updates to subscribers. - Assuming one main panel for real time subscription updates on Worklist and My Task pages.
DDID 2251	FALSE	Task Management	Work Tasks	Task Linking		1020	-
DDID 2252	FALSE	Task Management	Oversee Tasks	Task QA Sampling		1385	-

DDID #	Updated DDID?	Category	Sub-Category	Short Name	Requirement	Hours	Assumptions
					<p>The CONTRACTOR shall update the Task Management solution to allow authorized users to configure task creation and routing rules by Document Type and Form Number/Name. The solution must provide the following configurations:</p> <ol style="list-style-type: none"> 1) Custom grouping of Document Types and Form Number/Name 2) Configurability on which documents should create tasks and what type of task is created 3) The ability to accept program override(s) for task routing from the imaging solution 4) The option to suppress tasks when there is an upcoming appointment 5) The option to suppress tasks if the scanning user is the same person that would receive the task <p>The CONTRACTOR shall update the Task Management solution so that whenever a worker is assigned or self-assigns a task, the worker is simultaneously assigned all available tasks they can work for that same case. This feature must be configurable to be enabled or disabled by county administrators. This functionality must apply to the following reassignment methods:</p> <ol style="list-style-type: none"> 1) Manual task reassignment 2) Automated task reassignment 3) Get Next reassignment <p>The CONTRACTOR shall update the Task Management solution to allow authorized users to void tasks that were created by the bulk upload process.</p> <p>The CONTRACTOR shall update the Task Management solution to take into consideration, the following factors during automated task assignment:</p> <ol style="list-style-type: none"> 1) Language Skill 2) Culture Skill 3) Staff Classification 4) Max Task Assignment <p>The CONTRACTOR shall update the Task Management solution to include a start date for tasks. The automated task assignment logic will not assign tasks prior to their start date. Tasks must be accessible through the My Task, Task Search, and Worklist pages using existing search criteria.</p> <p>The CONTRACTOR shall update the Task Management solution to allow authorized users to re-open a task that was previously completed, voided, or expired.</p> <p>The CONTRACTOR shall update the Task Creation Report to include tasks created through the task bulk upload process.</p> <p>The CONTRACTOR shall develop and implement a Unified Task Management solution that supports the multiple tasking models in both C-IV and LRS, as follows:</p> <ol style="list-style-type: none"> 1) Integrate the Team Managed Pre-Migration C-IV solution into the CalSAWS Software code base 2) Create a common task management data model 3) Integrate the LRS automated tasks with the new county driven task activation, assignment and configurability logic (introduced with the C-IV Task solution) 4) Add the C-IV automated task trigger conditions into the CalSAWS Software code base ensuring there is no adverse or negative impact to LRS that would affect Los Angeles County 5) Add auto-assignment of tasks by the system through "round robin" or other workload balancing methodologies 6) Create a task pool where tasks can either be assigned by a supervisor or can be pulled by a caseworker 7) Update the LRS Task Management Dashboard (OBIEE) to account for the system modifications being made as part of migration <p>The CONTRACTOR shall migrate the Task icon link on the Utilities Navigation Bar to provide access to the My Task and Task Search pages.</p>		<p>- Task API and Imaging solutions will be implemented prior to, or at the same time as, the implementation of this DDID.</p> <p>- Task API solution can require different parameters based on the requesting partner. (i.e. imaging system)</p> <p>- County configuration applies to all Offices, Units, Positions within the county.</p> <p>- Task grouping only applies to task types defined by county administrators.</p> <p>- Administrative staff will set up and maintain position and staff configurations for the system to determine what skills and classifications a worker has.</p> <p>- This DDID will be implemented after, or at the same time as, DDID 2197 as it assumes leveraging components developed in that DDID.</p> <p>- Automated task assignment reductions apply to automated distribution in a push model only. Staff is able to self assign, and manually reassign, tasks without restriction.</p> <p>- Administrative staff will set up and maintain position and staff configurations for the system to determine what skills and classifications a worker has.</p> <p>- Task reports and batch jobs that include status do not require updates to distinguish "Reopened" tasks from "Open" tasks.</p> <p>- User will update due date upon reopening an expired to task, to avoid having the task expire again the next day.</p> <p>- CalSAWS Task Management Solution will support Task Reassignment functionality from C-IV.</p> <p>- CalSAWS Task Management Solution will support Task Bank functionality from C-IV, LRS Task MAQs will convert into Banks.</p> <p>- OBIEE Task Dashboard will be migrated over to new tool prior to Task Management Implementation.</p>
DDID 2254	FALSE	Task Management	Create Tasks	Document to Task Creation Settings		1625	
DDID 2275	FALSE	Task Management	Reassign Tasks	Get Case Tasks		1065	
DDID 2386	TRUE	Task Management	Create Tasks	Void Tasks Created in Bulk		500	
DDID 2387	TRUE	Task Management	Assign Tasks	Task Assignment Thresholds		1180	
DDID 2388	TRUE	Task Management	Assign Tasks	Task Start Date		915	
DDID 2389	TRUE	Task Management	Work Tasks	Re-Open Tasks		225	
DDID 2390	TRUE	Task Management	Oversee Tasks	Task Creation Report Update		245	
DDID 34	FALSE	Task Management	Base Solution	Base Solution		3590	
DDID 655	FALSE	Task Management	Work Tasks	Task Icon Utility Bar		540	