

☒ CalSAWS DD&I☐ C-IV M&O☐ CalWIN M&O☐ LRS M&E

Distribution Date:	April 6, 2021
To:	PPOC.R1; PPOC.R2; PPOC.R3; PPOC.R4; PPOC.R5; PPOC.Local; Consortium.SectionDirectors; Consortium.RegionalManagers.All
CIT Name:	CalSAWS Targeted Topics Session: Task Management
From:	CalSAWS Project

PPOCs, please forward to the appropriate impacted staff in your county:

- | | |
|--|---|
| <input type="checkbox"/> General | <input type="checkbox"/> Reports |
| <input type="checkbox"/> Policy | <input type="checkbox"/> Fiscal |
| <input type="checkbox"/> CW | <input type="checkbox"/> Caseload Movement |
| <input type="checkbox"/> CF | <input type="checkbox"/> Management |
| <input type="checkbox"/> MC | <input type="checkbox"/> Fiscal |
| <input type="checkbox"/> CMSP | <input type="checkbox"/> Security |
| <input type="checkbox"/> FC/KG/AAP | <input type="checkbox"/> Batch and Interfaces |
| <input type="checkbox"/> Child Care | <input type="checkbox"/> Imaging |
| <input type="checkbox"/> WtW | <input checked="" type="checkbox"/> Migration |
| <input type="checkbox"/> Other Program(s) _____ | <input type="checkbox"/> Conversion |
| <input type="checkbox"/> C4Yourself | <input type="checkbox"/> Technical |
| <input type="checkbox"/> Your Benefits Now! | <input type="checkbox"/> Training |
| <input type="checkbox"/> Customer Correspondence | <input type="checkbox"/> Help Desk |
| <input checked="" type="checkbox"/> Other Task Management _____ | |

Description:	<p>Purpose</p> <p>The purpose of this CIT is to notify the 58 CalSAWS Counties of the upcoming Task Management Targeted Topic Session (TTS) webinar that will take place on Tuesday, April 20, 2021. The webinar will provide an overview of Task Management functionality within CalSAWS.</p> <p>Background</p> <p>Targeted Topic Sessions are designed to provide counties a demonstration of current CalSAWS functionality within a specific area of the application. These sessions allow the Counties to better understand system processes and functionality of the planned CalSAWS solution. These sessions are not meant to train staff, but to provide a visualization of the various pages and functionality within CalSAWS.</p> <p>Recommended Attendees</p>
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The intended audience for this session is C-IV and LA County staff who work or manage tasks. CalWIN counties are invited to the Targeted Topic sessions to help **build awareness** of some of the changes they will encounter in CalSAWS.

Outlined below are areas within the system that will be demonstrated as they relate to Task Management.

- Preview all Task pages
 - Access Tasks in Utilities Navigation Bar
 - My Tasks
 - Task Search
 - My Banks
 - Worklist Summary page
 - Worklist page
 - Worklist PR / RE page
 - Pending Authorizations page
- Administrative Tasking Functionality
 - Manage Task Banks
 - Manage Task Reassignments
 - Error Prone and High Risk Administrative page
 - Manage Automated Actions
 - Managing County Tasks
 - Task Type Detail page
 - Task Sub-Type Detail page
 - Configure Appending Tasks
- Task Functionality Leveraging the Imaging Solution
 - Document Routing Rule Functionality
 - View Images Associated to Tasks
 - Task Detail page – from Worklist page
 - Task Detail page – from Task Pop Up window

Webinar Logistics (ZOOM)

Session Date: Tuesday, April 20, 2021


Session Time: 1:30 pm – 4:30 pm

Duration: 3 hours

Additional Information

The Targeted Topic Session will be presented via ZOOM (see attached ZOOM participant guide). Please join the session 10-15 minutes early to ensure that there are no connectivity issues, as we will be beginning the presentation at the designated start time. When participants join the meeting, please use the following naming convention: Region #- County Name-Participant Name. Ex. R3- Butte- Mickey Mouse

Note: The Targeted Topic session will be recorded and posted to the CalSAWS Web Portal along with a Question and Answer (Q&A) document and any other

	<p>supporting documentation. The Web Portal navigation path and hyperlink will be shared with your Regional Managers.</p> <p>During the Q&A, we will focus on answering C-IV questions first. CalWIN questions will be answered as time permits. Reminder: Please identify yourself by county when asking a question.</p> <p>CalWIN Counties will be working closely with their Implementation Vendor, Deloitte Consulting, in a separate, dedicated effort to fully understand the CalWIN business process and system changes in preparation for their migration to CalSAWS.</p> <p>County Action</p> <p>An Outlook meeting invitation will be sent to the PPOCs with the webinar details one week prior to the event. The PPOCs are responsible for forwarding the meeting invite to the appropriate staff.</p> <p>If you have any questions, please contact the Primary Project Contact listed below.</p>
Primary Project Contact:	<p>Araceli Gallardo CalSAWS Change Management Lead GallardoA@CalSAWS.org (916) 851-3103</p>
Backup Project Contact:	<p>Helen Cruz CalSAWS Change Management Lead Cruzh@CalSAWS.org (916) 851-3327</p>
Attachments:	<p>CIT 0083-21 CalSAWS Zoom Participant Guide.docx</p>
Web Portal Link:	<p></p> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"> 1. Click on the CRFIs & CITs link at the top of the page. 2. Click on the "CalSAWS Information Transmittal (CIT)" folder. 3. Click on the "2021" folder. 4. Click on the appropriate CIT # folder.