

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-225987

DDID 34

Task Management

Guided Navigation Updates

CalSAWS	DOCUMENT APPROVAL HISTORY	
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6/4/2021	1.1	Content Revision #1 <ul style="list-style-type: none"> • Recommendation to update Header of Guided Navigation/Task Navigation panel • Updated Guided Navigation attribute editability • Updated Section 3 - Guided Navigation Inventory 	Mayuri Srinivas

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1 OVERVIEW

This design includes recommendations to enhance Task Guided Navigation functionality.

1.1 Current Design

The CalSAWS System Worklist pages include functionality to navigate a user through one or more pages within a predefined page set while working a Task. This functionality is referred to as Guided Navigation.

The Task Pop-Up pages accessible with the Utilities "Tasks" link also allow users to work Tasks. The Task Pop-Up pages do not include the capability to initiate Guided Navigation.

1.2 Requests

Modify the CalSAWS System to allow initiation of Guided Navigation from the Task Pop-Up pages.

1.3 Overview of Recommendations

1. Update the logic that determines whether to display a Guided Navigation hyperlink on the Worklist, Worklist PR RE and Pending Authorizations pages to no longer be fully reliant on a specific Task Type name.
2. Incorporate a Guided Navigation hyperlink on the Task Pop-Up pages.
3. Update the Automated Action Detail page to include an attribute allowing users to turn on/off Guided Navigation for Automated Actions that have a Guided Navigation page set defined.
4. Update Deputy Authorization Task Type names.

1.4 Assumptions

1. The Guided Navigation experience currently available on the Worklist, Worklist PR RE and Pending Authorizations pages will not be modified. This design only modifies the logic that determines whether to display the Guided Navigation hyperlink on these pages.
2. There will be no modifications to the Authorization Task processing with the renaming of the Deputy Authorization Task Type names.
3. Automated Actions/Task Types outside of the inventory workbook in the Supporting Documents section do not have a Guided Navigation page set defined.
4. Guided Navigation page sets that currently exist and function for Los Angeles county will remain available for Los Angeles county.

2 RECOMMENDATIONS

This section will outline recommendations to update Task pages in the CalSAWS System to allow users to initiate Task Guided Navigation from the Task Pop-Up pages.

2.1 Task Guided Navigation Hyperlink Conditions

2.1.1 Description of Changes

1. Update the Task Guided Navigation Hyperlink display logic. A Task Guided Navigation hyperlink will display on the online pages referenced in Recommendation #2.2 when one or more of the following scenarios are met:

Scenario	County	Description
1	All	<ul style="list-style-type: none"> • The Task is assigned to the logged in user. • The Task is a "system task", which is a Task that is tied to specific processing within the CalSAWS System. These Task Types are available in the CalSAWS System for reference only and are not configurable. <p>Reference the workbook within the Supporting Documents section for an inventory of "system" tasks.</p>
2	All	<ul style="list-style-type: none"> • The Task is assigned to the logged in user. • The Task originated from an Automated Action with an associated Guided Navigation page set. • The Guided Navigation attribute on the Automated Action Detail page is "Yes". <p>Reference the workbook within the Supporting Documents section for an inventory of Automated Actions that will display the Guided Navigation attribute.</p>
3	Los Angeles	<ul style="list-style-type: none"> • The Task does not meet Scenario #1 or #2. • The Task is assigned to the logged in user. • The Task Type of the Task was loaded into the configurable Task Type framework via Phase I of DDID 34 (CA-214927). Los Angeles county Task Types that were loaded into the configurable Task Type framework at this time each have a guided navigation page set defined. <p>Reference the workbook within the Supporting Documents section for an inventory of Los Angeles</p>

		county Task Types that are not "system" tasks, not Automated Actions and have a guided navigation page set defined.
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Technical: The guided navigation page-set lookup logic is currently based on specific Task Type names that existed for Los Angeles county as of the 20.09 release. Update the guided navigation lookup framework to incorporate logic to determine the guided navigation page set by using a combination of the County Code of the user that clicked the hyperlink, Task Scenario Code (indicating a Task resulted from an Automated Action), and/or the Task Type name. Guided Navigation page sets that currently exist and function for Los Angeles county will remain available for Los Angeles county.

Guided navigation page sets for CalSAWS System Automated Tasks that have been moved into the Automated Action framework via DDID 1629 will be available for all CalSAWS counties for which the Automated Action has been configured via DDID 1629. Similarly, guided navigation page sets for CalSAWS System Automated Tasks that are "system tasks" will be available for all CalSAWS counties. Tasks that result from Automated Actions introduced via DDID 1628 will not display a hyperlink as a Guided Navigation page set is not available.

If Guided Navigation is initiated from one of the Task Pop-Up pages, and the page set defines a completion page, the final page in the flow will be the CalSAWS Homepage. The completion page for Guided Navigation that is initiated from the Worklist pages will not be modified. The completion page that is displayed is dependent on the page that initiated the Guided Navigation page flow. This function is due to the complex processing in the CalSAWS System guided navigation architecture that will not be completely reworked with this enhancement.

For example, a worker clicks the Guided Navigation hyperlink from a Task Pop up page, works through half of the pages in the page flow, logs out and goes to lunch. The worker returns after lunch, logs into CalSAWS and re-initiates Guided Navigation for the same Task, but this time they click the hyperlink on the Worklist page, when the end of the page flow is reached, the Homepage will be displayed as opposed to the Worklist page.

2.2 Update/Add the Task Guided Navigation Hyperlink on Task Pages

2.2.1 Description of Changes

1. Update the following Task Pages to display a Guided Navigation Hyperlink when applicable:

a. My Tasks Pop-Up

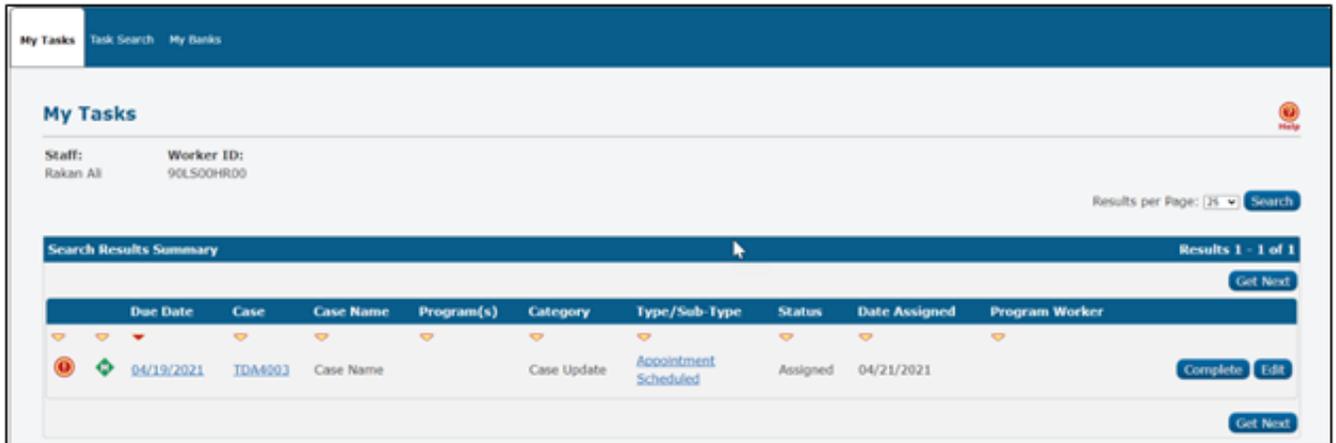


Figure 2.2.1.2.a-1 – Task Pop-Up My Tasks Page Mockup

- i. Update the Task Pop-Up My Tasks page to display the Task Type/Sub-Type value as a hyperlink to initiate Guided Navigation when available per Section 2.1. If guided navigation is not available or has been turned off for a particular Task, the attribute will display as plain text. Note: The display behavior of the Long Description hover box that displays on mouseover of this field will not be impacted.
Behavior: When the hyperlink is clicked, the Task Detail overlay for the Task will display in the Pop-Up window and Guided Navigation will be initiated in the main CalSAWS window. On click of a Guided Navigation hyperlink within the Task Pop-Up window, no additional pop-up windows will be opened.

b. Task Search Pop-Up

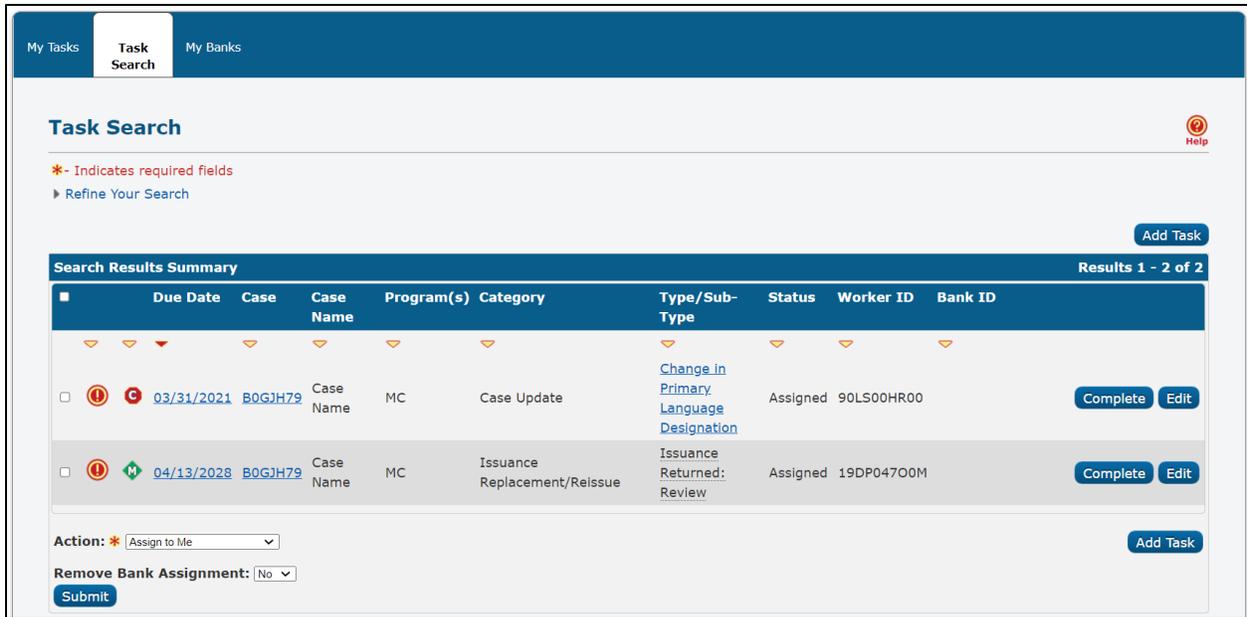


Figure 2.2.1.2.b-1 – Task Pop-Up Task Search Page Mockup

- i. Update the Task Pop-Up Task Search page to display the Task Type/Sub-Type value as a hyperlink to initiate Guided Navigation when available. If guided navigation is not available or has been turned off for a particular Task, the attribute will display as plain text. Note: The display behavior of the Long Description hover box that displays on mouseover of this field will not be impacted.

Behavior: When the hyperlink is clicked, the Task Detail overlay for the Task will display in the Pop-Up window and Guided Navigation will be initiated in the main CalSAWS window. On click of a Guided Navigation hyperlink within the Task Pop-Up window, no additional pop-up windows will be opened.

c. Task Pop-Up Task Detail Page

Task Detail

Result 1 of 1 - 3

*- Indicates required fields

Case Number B0GJH79	Case Name: Case Name	Program(s): * Medi-Cal - PORFIRIO CONNOR	Status: * Assigned	Reference Number:
Category: * Case Update	Type: * Change in Primary Language Designation	Sub-Type:	Priority: Critical	
Due Date: * 03/31/2021	Date Created: 03/30/2021	Worker Assigned Date: 04/28/2021		
Assign to Program Worker: No	Worker ID: 90LS00HR00	Bank ID:	Automated Action: No	

Long Description:

[▶ Instructions](#)

Figure 2.2.1.2.c-1 – Task Pop-Up Task Detail Page Mockup

- i. Update the Task Pop-Up Task Detail page to display the Task Type value as a hyperlink to initiate Guided Navigation when available. If guided navigation is not available or has been turned off for a particular Task, the attribute will display as plain text.

Behavior: When the hyperlink is clicked, Guided Navigation will be initiated in the main CalSAWS window. On click of a Guided Navigation hyperlink within the Task Pop-Up window, no additional pop-up windows will be opened.

2. Update the Header verbiage of the Task Navigation panel to be "Guided Navigation" when in the context of a Task Guided Navigation page set.
3. Update the Guided Navigation Hyperlink display logic per Section 2.1 on the following Task pages.
 - a. Worklist
Guided Navigation hyperlink field: "Type / Sub-Type"
 - b. Worklist PR RE
Guided Navigation hyperlink field: "Type / Sub-Type"
 - c. Pending Authorizations
Guided Navigation hyperlink field: "Type"

2.3 Automated Action Detail Page

2.3.1 Overview

The Automated Action Detail page is accessible from the Automated Action List page. This page allows the User to view and configure Automated Action attributes.

2.3.2 Automated Action Detail Page Mockup

Automated Action Detail

Action Information

Name: 180 Day EC Good Cause set to expire	Type: Create Task	Status: * Active <input type="button" value="v"/>
Program(s): FC	Run Date: Daily(Mon-Sat)	Source: Batch
Scenario: Emergency Caregiver Good Cause date set to expire		

Task Information

Task Type: * 180-Day EC Good Cause set to expire <input type="button" value="v"/>	Default Due Date: 30 days
Due Date: Default Due Date <input type="button" value="v"/>	Program Worker: Currently Assigned Worker <input type="button" value="v"/>
Initial Assignment: Program Worker/Bank <input type="button" value="v"/>	Default Bank ID: <input type="text"/> <input type="button" value="Select"/>
Guided Navigation: * No <input type="button" value="v"/>	
Long Description: 180-Day Emergency Caregiver Good Cause end date set to expire {Calculated Good Cause End Date}. The Good Cause End Date was calculated to be 180 Days from the License Begin Date {License Begin Date}. Please review eligibility.	

Figure 2.3.2.1 – Automated Action Detail Mockup Edit Mode

Automated Action Detail

Edit Close

Action Information

Name: 180 Day EC Good Cause set to expire	Type: Create Task	Status: * Active
Program(s): FC	Run Date: Daily(Mon-Sat)	Source: Batch
Scenario: Emergency Caregiver Good Cause date set to expire		

Task Information

Task Type: *
180-Day EC Good Cause set to expire

Due Date: Default Due Date	Default Due Date: 30 days
Initial Assignment: Program Worker/Bank	Program Worker: Currently Assigned Worker
	Default Bank ID:

Guided Navigation: *
No

Long Description:
180-Day Emergency Caregiver Good Cause end date set to expire {Calculated Good Cause End Date}. The Good Cause End Date was calculated to be 180 Days from the License Begin Date {License Begin Date}. Please review eligibility.

Edit Close

Figure 2.3.2.2 – Automated Action Detail Mockup View Mode

2.3.3 Description of Changes

1. Update the Automated Action Detail page to include a Guided Navigation attribute. The Guided Navigation attribute will be used by the logic described in Section 2.1 for display of a Guided Navigation hyperlink for a Task.
 - a. Guided Navigation **(required)** – This dropdown field indicates if Tasks that result from the Automated Action have been enabled for Guided Navigation. Options include:
 - i. Yes – This option enables Guided Navigation for existing Tasks in the Assigned and In Process Statuses and any Tasks created in the future through the specific Automated Action.
 - ii. No – This option disables Guided Navigation for the Tasks created through the specific Automated Action.
 - b. The attribute will display on the page if the Automated Action has a Guided Navigation page set defined. For example, Automated Actions that have been added to the CalSAWS System as part of

DDID 1628 (C-IV System Automated Actions) do not have a Guided Navigation page set defined, so the attribute will not display. Reference the workbook in the Supporting Documents section for an inventory of Automated Actions that will display the attribute.

c. This field will not be editable for the following Automated Actions:

- i. Clearance
- ii. Clearance: CMIPSI
- iii. Clearance: ICT
- iv. Clearance: e-Application
- v. Intake

d. For Automated Actions that will display the Guided Navigation attribute, the value will be set to "No" initially for all Automated Actions/counties other than Los Angeles. The attribute will initially be set to "Yes" for Los Angeles county Automated Actions that have a guided navigation page set available.

2.3.4 Page Validations

N/A

2.3.5 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.

2.3.6 Security Updates

N/A – No Changes to Security

2.3.7 Page Mapping

Update page mapping for the Automated Action Detail page to include the Guided Navigation attribute.

2.3.8 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.4 Deputy Authorization Task Types

2.4.1 Description of Changes

1. Update the Authorization Task Type names that reference “Deputy” to now reference “2nd Level”. **Technical:** Guided Navigation task type name references while looking up a Guided Navigation page set will also be updated.

Previous Names:

- Deputy Authorization – Invoice
- Deputy Authorization - Transaction Refund
- Deputy Authorization - Issuance Replacement/Reissue
- Deputy Authorization - Payment Request (Lvl 1)
- Deputy Authorization - Payment Request (Lvl 2)
- Deputy Authorization - Valuable (Lvl 1)
- Deputy Authorization - Valuable (Lvl 2)
- Deputy Authorization EDBC

Updated Names:

- 2nd Level Authorization – Invoice
- 2nd Level Authorization - Transaction Refund
- 2nd Level Authorization - Issuance Replacement/Reissue
- 2nd Level Authorization - Payment Request (Lvl 1)
- 2nd Level Authorization - Payment Request (Lvl 2)
- 2nd Level Authorization - Valuable (Lvl 1)
- 2nd Level Authorization - Valuable (Lvl 2)
- 2nd Level Authorization EDBC

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Task Management	Guided Navigation Inventory	 Guided Navigation Inventory.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
34	<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 	<ul style="list-style-type: none"> - 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. 	<p>This design introduces a recommendation that will support Guided Navigation and process flow of completing Tasks, while considering configurable Automated Actions and "System Tasks".</p>

	Management Dashboard (OBIEE) to account for the system modifications being made as part of migration		
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5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A