

Date: 11/17/22	Location: MS Teams
Time: 1:30-3:35	Meeting called by: Task Management Facilitators

Attendees:

Region 1: Terri Rose, Miguel Garza, Lorena Moran, Rachel Gomez

Region 2: Christopher Craig, Shawna Reed

Region 3: Aaron del la Cerda, Andrea Broughton, Serena Griffin, Dawn Alves

Region 4: John Garcia, Shalane Camaquin, Monique Micenheimer; Tara Borba

Region 5: Shelly Nava, Rhonda Staple, Cesar Lerma, Steven Hoadley, Amber Gonzalez

Region 6: Gaston Herrera, Juan Herrera, Latrice Anderson, Mario Palacios, Sergio Andrade

Topic

Important Points

SCRs for Review

- CA-250230 – Sibling Task Assignment

- **Votes are due 11/28/2022**
- Document was reviewed due to the questions and feedback counties provided when the email sent out
- "Sibling" Task assignment is a configuration option for automated Tasks in the CalSAWS System. This mechanism will evaluate Tasks in an "Assigned" or "In Process" Status which already exist for the Case and attempt to route the new Task to the same worker
- The Overview of Recommendations were reviewed and discussed:
 - The **Automated Action Detail page** to include the option to turn on or off the Sibling Assignment functionality
 - The **Document Routing Rule Program Detail page** to include the option to turn on or off the Sibling Assignment functionality
 - The **MEDS Alert Admin Detail page** to include the option to turn on or off the Sibling Assignment functionality
 - The **Task Upload templates** to include an option to utilize the Sibling Task Assignment functionality.
- Sum it up: Sibling Task assignment processing is just an assignment method that can be applied prior to evaluating existing assignment configurations. All other functions will not be affected and will process normally.
- A "Sibling" Task is a Task in a status of "Assigned" or "In Process" for the Case that is assigned to a Worker.

This assignment processing also strictly targets Workers/Positions for assignment of the new Task, it will not route new Tasks into Task Banks. *Task Banks are often configured to house specific types of Tasks*

based on assignment/reassignment configurations; Sibling Task Assignment processing will not route new Tasks into Task Banks so as not to interfere with specific Task Bank purpose/configuration.

- Sibling Task Assignment processing only applies to Automated Tasks, it does not apply to Tasks that are manually created. **However, counties have expressed interest to turn this on – Updated design has been sent out. Worker Suggestion has been updated to include sibling assignment.**
- Sibling Task Assignment processing will not be applied to Tasks which do not have a Case/Program association, for example “Clearance” Tasks.
- If multiple sibling Tasks are found that are distributed across 2 or more Workers, assign the new Task to the same Worker holding **the sibling Task with the most recent Assigned Date.**
- Sibling Task Assignment processing **will not impact the program hierarchy in document routing rules as described in CA-247248** as the Sibling Task Assignment logic will be applied as part of the Worker determination
- Review Page 8, **Figure 2.1 – Sibling Task Assignment Flow**

CERS for Review

- CA-233512-Mandatory Verifications Negative Action Task List -Tehama

- More information is needed, and this was tabled for now

Discussion Items

- Intake Task- Auto Closure

- Background: Automated Action – Not all counties have this enabled. Around 7 counties total may be using this feature. When you are processing an application or ICT as you go through the flow of linking a case or creating a new case, you land on the pending assignment list where you see all the programs associated to a case and you can assign those programs to a worker. When you assign, the trigger enables the intake automatic action. When a program is assigned, for example CalWORKs, a task is assigned to a CalWORKs Intake worker, letting them know they have been assigned to the program
- CalSAWS functionality currently has an auto closure process for intake automatic action tasks. There is a batch job that runs daily and attempts to identify certain criteria to automatically close the task.
- The functionality is too restrictive currently with dates of applications and there is concern that the task will be closed without action is taken.

Topic

Important Points

- Suggested Enhancement from the group: In Batch, CalSAWS will look for and identify criteria to either close the task or leave it alone when:
- EDBC is ran that day and the case status changes from pending to denied, CalSAWS will automatically complete the task that was created when the program was assigned
- A case in pending status no matter if the application date is in the past, present or future month, CalSAWS will not automatically complete the task.
- Options presented on how to resolve:
 - Treat it as a defect so it can be resolved quicker.
 - Treat it as a configurable option to Complete task it will take longer for the county to choose yes or no to complete the tasks
- Result: Treat it as a defect. Remove the month date of application criteria and focus on the status of Pending for the automation of closing the task.
- This logic is specific to and limited to tasks created in the intake automation

Task Workgroup - Subcommittee

- Announcement by CRFI is coming soon that will be recruiting for a small separate workgroup
- The goal is to accomplish some fast turnarounds on some enhancements needed in multiple areas in CalSAWS
- When the CRFI is published counties will have a 2 week turn around volunteer
- No more than 2 participants per region are needed
- Members will meet once a week, review items quickly, and they will need to have knowledge in areas of task management and task dashboards
- Enhancements that are identified in the subgroup and determined that a CalSAWS Enhancement Request (CER) is needed, the process that is in place now will be followed and discussed in our group

(Optional Items)

#	Action Item	Assigned To	Assigned Date	Due Date	Status
1	Review Sibling Task Assignment processing and apply it to manually created tasks	Sarah & Justin			Completed

2	Design for CA-250230 Task Management - Sibling Task Assignment	County RCM's	Regional votes are due 11/28/22.
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3	Design for CA-250952 Update Task Pop-Up Pages to Indicate Append.	County RCM's	Regional votes are due 11/29/22.
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#	Decision Made	Who Made the Decision	Date
1			
2			

