

|                  |   |
|------------------|---|
| Date: 01/26/2023 | Location: MS Teams                              |
| Time: 1:30-5:00  | Meeting called by: Task Management Facilitators |

**Attendees:**

Region 1: Terri Rose, Miguel Garza, Mylynn Bui, Jazmin Mercado

Region 2: Christopher Craig, Shawna Reed

Region 3: Aaron del la Cerda, Serena Griffin, Veronica Riggins

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

Region 5: Shelly Nava, Melissa Billedo, Rhonda Staple, Steven Hoadley, Cesar Lema

Region 6: Gaston Herrera, Latrice Anderson, Mario Palacios

**Topic**

**Important Points**

**SCR's for Review**

- CA 250541 – Update Task Reassignment Limit

- Votes are due today 01/26/23 – all regions voted to approve.
- Overview: 1) Increase the Task Reassignment batch processing Task limit from 2,500 to 10,000. Batch will process reassignment overnight. 2) Increase the number of Tasks that can be reassigned in Realtime to 2,500. This will be done with the frequency of “immediately”.
- The “immediately” frequency can be done multiple times in a day.
- A concern was raised that once a reassignment has been processed by batch there is not a way to undo.
- Reviewing the functionality of task reassignments and the different options that can be utilized as well as how you can utilize worker's schedule.
- What happens to tasks that are being actively worked or are open and being edited
  - If assigned they could be candidates for reassignment. Dependent on search criteria and tasks status when reassigning.
- Able to do multiple in one day
  - Yes, no current limitation
- Able to undo reassignment?
  - Not at this time, no undo feature
- 10,000 limit is for each instruction/reassignment request
- Are immediate requests going to be one time job only
  - Yes, no reoccurrence option for immediate requests

**SCR's for Review**

- CA 227714 – Update IEVS Tracking Functionality

- Informational, no vote being called at this time.
- Does have a task element, if choose to activate (Programs – CalFresh and CalWORKs).
- New automation for document overdue CW 63.
- Batch run process, daily, searching for the CW 63 form sent 10 days or more.
- CW 63 tracking functionality being implemented.

## Topic

## Important Points

- Automated action; document overdue: CW 63 task will be created will be created when document isn't received timely. Duplicate tasks will not be created.

### Discussion Items

- Task Workgroup Update

- Enhancement Task Management Workgroup
- Meet weekly for 2-3 hours (have met 4 times) from now until June 2023
- 2 major focuses: Enhancement of tasks and Reporting for tasks.
- Types of discussions: keeping track of tasks, ways for data to record how long a task type takes to process, easier ways to route tasks, more functioning home page, and potential enhancements to reports.
- Updates will be provided at each Task management meeting

### Open Discussion Items

- How are other counties managing/prioritizing tasks

- Placer County would like tips and tricks on how other Counties has set up task management.
- RM – Jennifer Hobbs will set up meeting with Nevada Co and San Francisco would like to be included in discussion.