

# Caseloads

## Caseload Types

There are two different types of caseloads in CalSAWS:

1

### Individual Caseload:

Programs that are assigned to a Worker ID belonging to a specific worker.

2

### Banked Caseload:

Programs assigned to a Worker ID that is set up to 'house' cases that meet certain County specific criteria for case management. The name assigned to the Worker ID typically indicates the types of programs that belong in that banked caseload.

## No Closed Caseloads

There are no 'closed' caseloads in CalSAWS. The system discontinues programs, not cases.

When a program is discontinued, the worker assignment is ended for that program, and the Worker ID is removed. The timeframe of this removal is based on County, Program and status of the program. Any task associated with the Worker ID remains assigned until the task is either completed or expires.



## Case Assignment

Cases can be assigned automatically or manually.

### Automatic Assignment:

When cases are assigned automatically, CalSAWS looks for a worker in the office (of the worker assigning) who is set for auto assignment and configured to accept program assignments meeting the following four criteria:

1. Case Flag (e.g., Teen Parent, Convicted Drug Felon)
2. Case Type and Program Type
3. Language
4. Maximum Number of Cases a Worker Can Be Assigned

1

If no worker is found, CalSAWS looks for a worker with criteria 1-3. If no eligible worker is found again, an error message will display, and the case must be manually assigned on the **Pending Assignment List** page.

A screenshot of the 'Pending Assignment List' page in CalSAWS. The page has a blue header with the title 'Pending Assignment List' and two buttons: 'Assign' and 'Close'. Below the header is a table with columns: 'Program', 'Previous Worker', 'Worker Id', and 'Disc./ Denied'. The table contains several rows with checkboxes in the 'Program' column. Below the table is a section titled 'Assignment Options' with two radio buttons: 'Automatic Assignment' (which is selected) and 'Manual Assignment'. There is a 'Select' button at the bottom of the options section.

2

### Manual Assignment:

Cases that are not automatically assigned can be manually assigned to a worker or banked caseload on the **Pending Assignment List** page.

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## Viewing Caseloads

Workers can view their caseload on the applicable **Workload Inventory** page. To navigate to the **Eligibility Workload Inventory** page, workers hover over **Eligibility** on the Global navigation bar and click **Workload Inventory**.

### Eligibility Workload Inventory

**Eligibility Workload Inventory**

\* - Indicates required fields

Worker ID: 36LS39R705  Assignment Type:  Display Workload: \* 02/23/2023

Status Effective Date: \* 02/23/2023  Status:

Results per Page: 100

**Search Results Summary** Results 1 - 9 of 9

**Total Assignments**

Cases	7
Programs	9

Case Number	Primary	Program	Status	Application Date	Auth Date	RE Date	CFS
 <a href="#">3330599</a>	Dupee, Nitin 26F	ECF	Pending	12/22/2022			
 <a href="#">F501458</a>	Example, Miss 23F	ECF	Pending	02/16/2023			
 <a href="#">F5014C1</a>	Friends, Mia 24F	MC	Pending	02/21/2023			

By default, the Worker ID displayed belongs to the logged in user. Other caseloads can be viewed by selecting a different Worker ID on the **Workload Inventory** page.

### Employment Services Workload Inventory

**Employment Services Workload Inventory**

Worker ID: 36ES06030A  Display Workload: \* 02/23/2023  Status Effective Date: \* 03/01/2023  Program Status:

Results per Page: 100

**Search Results Summary** Results 1 - 62 of 62

**Total Assignments**

Cases	56
Program	62

Case Number	Name	Program	Program Status	Program Status Reason	Program Review Date	Activity	Activity Review Date	Benefit Program Status
 <a href="#">1500419</a>	Speer, Morena 41F	WT	Pending			Voc/Ed Training	12/16/2022	Pending
 <a href="#">1416108</a>	Tondreau, Roderic 39F	WT	Pending		12/02/2022			Pending
 <a href="#">1259391</a>	Volden, Theda 39F	WT	Pending		09/01/2016			Pending

The Imaging Indicator icon to the left of the Case Number displays on the **Workload Inventory** page when there are new images uploaded to the case in the past 30 days.

### Child Care Workload Inventory

**Child Care Workload Inventory**

Worker ID: 36ES06ST09  Display Workload: \* 02/23/2023  Status Effective Date: \* 03/01/2023  Program Status:

Results per Page: 100

**Search Results Summary** Results 1 - 1 of 1

**Total Assignments**

Cases	1
Programs	1

Case Number	Primary	Sub-Program	Status	Application Date	Re-Evaluation Date
 <a href="#">3332370</a>		Stage 1	Active	02/22/2023	01/31/2024

The Child Care Workload Inventory page also displays the Sub-Program (circled in green).