CalSAWS

Configuration Guide

May 2023

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Configuration Guide

Chapter One: Core and Task Configurations

Introduction

The purpose of this Configuration Guide is to provide an additional resource with relevant information to CalSAWS Users. This Guide is to be used in conjunction with practical experience received during UAT (User Acceptance Testing), Process Simulation exercises, To-Be sessions and county specific training. It can also help illustrate and define what configuration looks like and how it works in the production environment. This guide will outline various processes related to CalSAWS configuration as well as highlight specific "need to know" areas of system functionality. The Guide will be comprised of three distinct sections, Core Configuration, including Task Management Configuration, Additional Configuration and Security Configuration. The Core Configuration section includes areas of configuration that will migrate in the conversion process. This guide provides detailed instruction to assist in future Core Configuration maintenance. The Task Management section of Core Configuration provides details from task creation to task assignment. Answers to questions regarding how CalSAWS Configuration works, and definitions of project specific configuration terms will be found in this Guide. The Additional Configuration section includes optional or non-core functionality set-up. Lastly, the Security Role Configuration section provides detailed instruction on the use of Project Maintained Roles and the creation of County Security Roles.

Each topic in the Guide will be comprised and Overview and Page Details. The Overview section discusses the purpose of the functionality at a high level. The Page Details section reviews the fields and components of each Page in more detail.

Additionally, in the Task Management section, Key Considerations have been noted. The Key Considerations section highlights the impact of the noted functionality. This document is not designed to capture information for all Task Management pages and functionality. Additional Task Management Support Materials can be found in the LMS for review of the Task Pop-Up and Worklist pages, and Task Dashboard.

This guide will not be updated on a regular basis; however, additional training will be made available in the LMS to reflect ongoing enhancements to CalSAWS

What is Configuration?

con·fig·u·ra·tion

NOUN

- An arrangement of elements in a particular form, figure, or combination.
- **In association with Computing:**
    - the arrangement or set-up of the hardware, software and data that make up a computer system.
- **CalSAWS definition:**

- actions counties collectively agree to take, within the CalSAWS system, to better support their local business process within the scope of system functionality.

Working in conjunction with system functionality, configuration is the heartbeat of the CalSAWS system. Some configurations are a one-time effort, some require ongoing maintenance. This guide, along with many other tools, will assist in defining your county's unique configuration set-up. Initial Configuration Set-Up will occur prior to migration to the CalSAWS system.

Core County Configuration

Configuration in CalSAWS is inter-dependent on several pieces working together to reach the desired outcome. The arrangement of this guide represents the flow required to successfully set up County Configuration for optimum system functionality and County operations. From the creation of Security Roles to Assigning Staff to Positions, each step is clearly defined in its function and directions are provided to complete the requirements in CalSAWS. The initial Core Configuration will be established at the time of Conversion. The Configurations that are included in Conversion will be identified in this guide, and on the corresponding worksheet, by a *Yellow Highlight*. The identified sections may require County input for Go-Live.

Staff Configuration

Overview

Staff Configuration is the creation of all Staff Members/Users in CalSAWS. Your existing staff will be set up during the migration process. The following information will allow you to validate migration and provide steps that will be used to add future staff.

Information necessary to create a staff profile includes (at a minimum) Last Name, Staff Status Code, Classification Title, Spoken Language and Proficiency and Email Address. Once Staff are created, they can be assigned to an Office, Unit and Position.

Staff Search

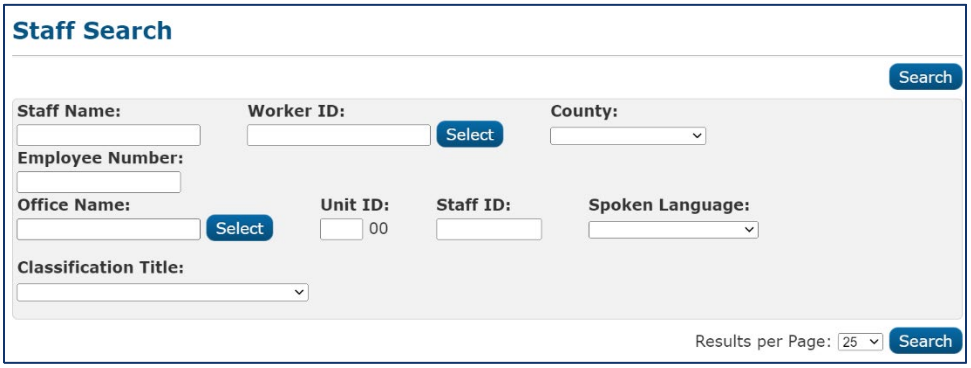


Figure 3 – Staff Search Page

The **Staff Search** page allows users to search for existing staff in the system. The available search criteria include Staff Name, Worker ID, County, Employee Number, Office Name, Unit ID, Staff ID, Spoken Language and Classification Title. Before you can Create Staff, you must first conduct a Staff Search. On the **Search Results Summary** you will determine if the staff already exists or must be added. To create a staff member:

On the **Staff Search** page, **Search Results Summary**:

1. Click the **Add Staff** button.

Staff Detail

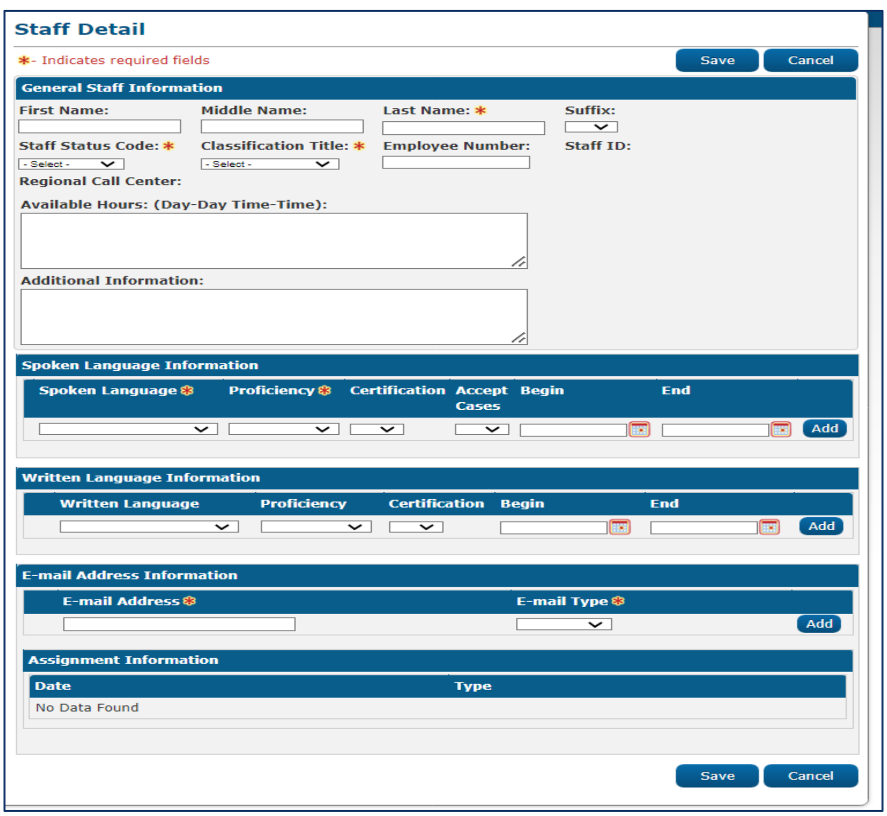


Figure 4 – Staff Detail Page – Create Mode

On the **Staff Detail** page, **General Staff Information** section:

1. Enter **Staff First Name**, **Middle Name**, **Last Name** and **Suffix** if needed.
2. Select **Staff Status Code**. Your options will be Active FT, Active PT, Inactive or Temp Inactive.
3. Select **Classification Title**. Examples of **Classification Titles** would include Eligibility Workers, Office Assistants, Supervisors, etc.
4. Enter **Employee Number**. This is not a required field. This field could be used to capture County Employee ID.
5. The **Available Hours** and **Additional Information** fields are not required. Both fields are free form text.

On the **Staff Detail** page, **Spoken Language Information** section:

1. Select **Spoken Language**, **Proficiency**, and **Certification**.
2. Select **Accept Cases**. The options on this field are yes and no and will determine if cases with specified spoken language can be assigned to the Staff member being created.
3. Enter **Begin** date.

On the **Staff Detail** page, **Written Language Information** section:

1. Select Written **Language**, **Proficiency** and **Certification**.
2. Enter **Begin** date.

Note: Written Language Information is optional and does not require entries to complete Staff creation.

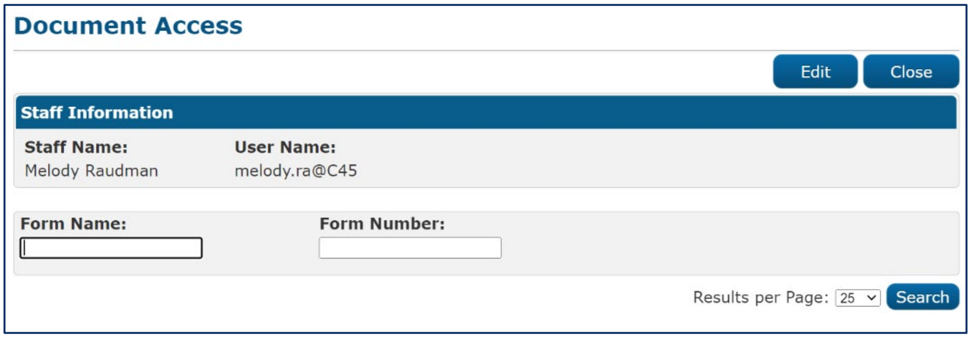
On the **Staff Detail** page, **E-mail Address Information** section:

1. Enter **E-mail Address**. One E-mail Type **must** be designated as ***Primary*** per staff.
2. To add an additional **E-mail Address**, click the Add button.

Once all information is complete and you click the **Save** button, the **Staff Detail** page will populate with a system generated **Staff ID** number. This **Staff ID** number is unique and provides a level for search capabilities. The ID is not used for system access.

After you click the **Save** button, you can now access the **Document Access** and **Security Assignment** pages from the **Staff Detail** page.

Document Access



Document Access

Edit Close

Staff Information

Staff Name: Melody Raudman

User Name: melody.ra@C45

Form Name:

Form Number:

Results per Page: 25 Search

Figure 5 – Document Access Page

The **Document Access** page allows counties to restrict access to specific documents for a specific Staff member. This step is not required to complete Staff creation. To set up a restriction:

On the **Staff Detail** page:

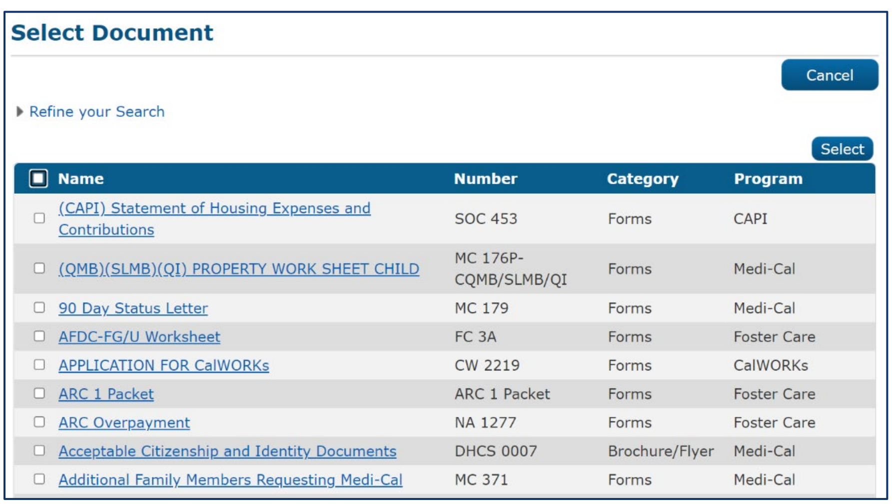
1. Click the **Document Access** button.

On the **Document Access** page:

1. Click the **Edit** button. Once the Edit button is clicked, the screen will refresh with an additional **Add Document** button.
2. Click the **Add Document** button.

Select Document

On the **Select Document** page:



Select Document

Cancel

Refine your Search

Select

Name	Number	Category	Program
(CAPI) Statement of Housing Expenses and Contributions	SOC 453	Forms	CAPI
(QMB)(SLMB)(QI) PROPERTY WORK SHEET CHILD	MC 176P-CQMB/SLMB/QI	Forms	Medi-Cal
90 Day Status Letter	MC 179	Forms	Medi-Cal
AFDC-FG/U Worksheet	FC 3A	Forms	Foster Care
APPLICATION FOR CalWORKs	CW 2219	Forms	CalWORKs
ARC 1 Packet	ARC 1 Packet	Forms	Foster Care
ARC Overpayment	NA 1277	Forms	Foster Care
Acceptable Citizenship and Identity Documents	DHCS 0007	Brochure/Flyer	Medi-Cal
Additional Family Members Requesting Medi-Cal	MC 371	Forms	Medi-Cal

Figure 6 – Select Document Page– Create Mode

1. Select the **Name** check box for each form you would like to place a restriction on.
2. Click the **Select** button.

On the **Document Access** page:

1. Click the **Save** button.

Note: For Security Assignment, see Chapter Three

Page Location

Global: Admin Tools
Local: Office Admin
Task: Staff

Additional Page Location

Global: Admin Tools
Local: Admin
Task: Non-County Staff

Office Configuration

Overview

Information necessary to start **Office Configuration** in CalSAWS includes Office Name, Begin Date, Office Type, Mailing and Physical Address, Main Phone Number, Hours of Operation, Correspondence Hours, Programs Offered, Office Relationships and a determination if the Office will accept Electronic Applications. Once this information is defined, you will be ready to create an Office in CalSAWS.

Note: CalSAWS assigns Office numbers, this item is not configurable by the County. During migration, all existing offices will convert to CalSAWS.

This guide provides the details needed to add additional Offices if/when needed.

Office Search

Figure 15 – Office Search Page

The **Office Search** Page allows staff to search for current offices in the system. The available search criteria include Office ID, Office Name, Office Type, County and End Date. Before you can Create an Office, you must first conduct an Office Search. On the **Search Results Summary** you will determine if the office already exists or must be added. To create an Office:

On the **Office Search** page, **Search Results Summary**:

1. Click the **Add Office** button.

Office Detail

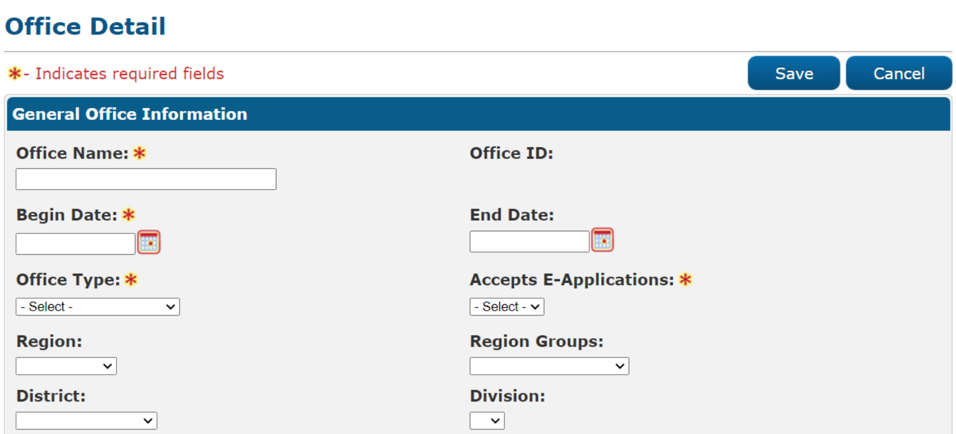


Figure 16 – Office Detail Page – General Office Information Section - Create Mode

On the **Office Detail** page, **General Office** Information:

1. Enter **Office Name**. This is a free form field, defined by the County.
2. Enter **Begin Date**. This will establish the starting date of this Office in CalSAWS. If the County closes an Office, an End Date would be entered on this page.
3. Select **Office Type**.
4. Select **Accepts E-Applications**. This will determine if applications from BenefitsCal are sent to this office. The drop-down options are Yes or No.

5. Select **Region**. This field is dynamic by County. If County does not have designated Regions, this field will not be available on the Office Detail page. This field does not require an entry.
6. Select **Region Groups**. The options for this field are Contracted REP, Contracted Region and non-Contracted Region. This field does not require and entry.
7. Select **District,** if appropriate.
8. Select **Division.** Division categories defined at the Project level.

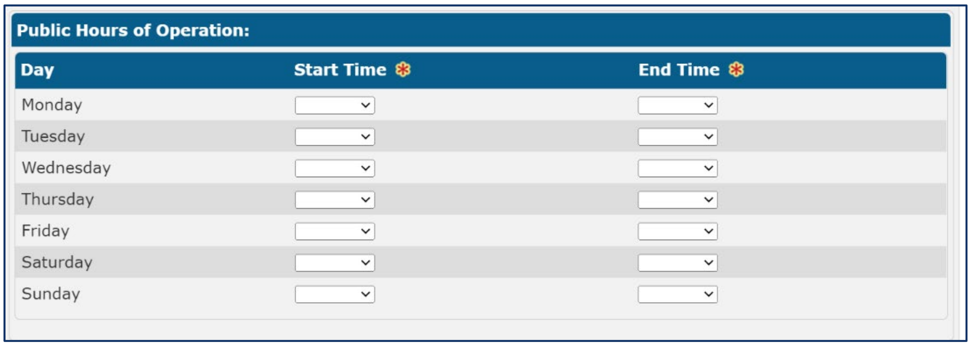


Figure 17 – Office Detail Page – Public Hours of Operation Section – Create Mode

On the **Office Detail** page, **Public Hours of Operation** section:

1. Enter your **Public Hours of Operation**. Start and End times must be defined for each weekday.

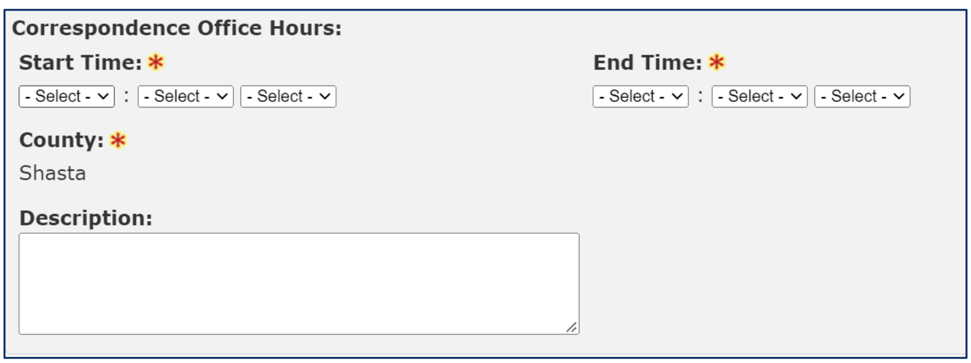


Figure 18 – Office Detail Page – Correspondence Office Hours Section – Create Mode

On the **Office Detail** page, **Correspondence Office Hours** section:

1. Enter your **Correspondence Office Hours**. Start and End times must be defined.

   Note: The County field will default to the County of the logged in user.

2. The **Description** field is free form and available for county use.

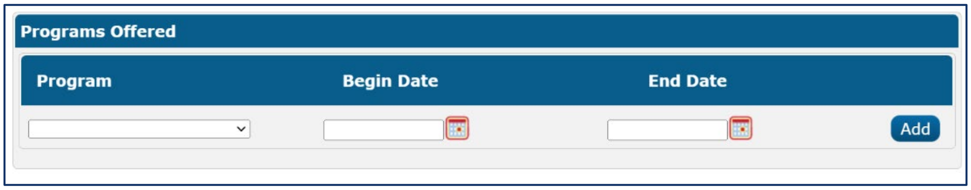


Figure 19 – Office Detail Page – Programs Offered Section – Create Mode

On the **Office Detail** page, **Programs Offered** section:

1. Select **Program**.
2. Enter **Begin Date**.
3. If additional Programs need to be identified for the Office, Select the **Add** button, and repeat steps 1 and 2.

Figure 20 – Office Detail Page – Address Information Section – Create Mode

On the **Office Detail** Page, **Address Informatio**n section:

1. Select the **Add Address** button.

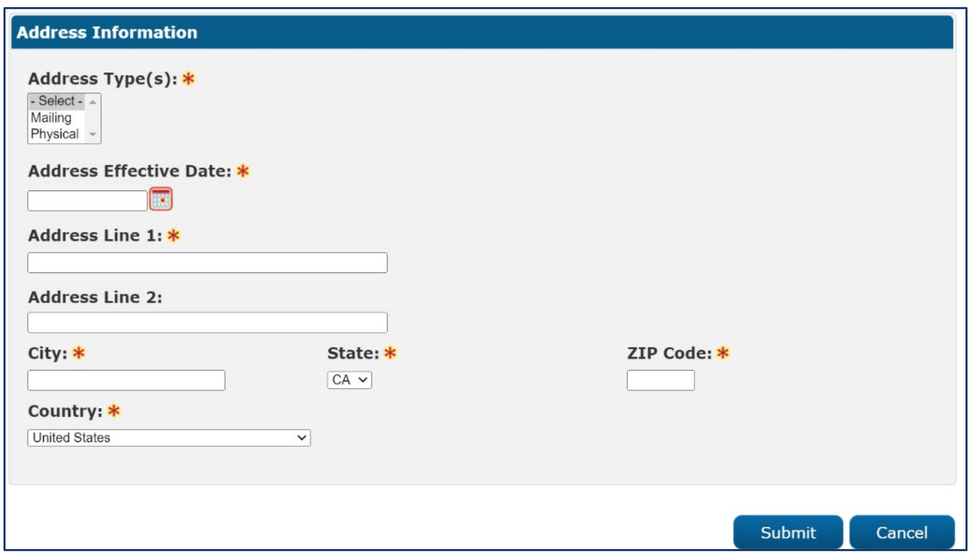


Figure 21 – Address Information Page – Create Mode

Address Detail

On the **Address Detail** page, **Address Information** section:

1. Select **Address Type(s)**. The options are Mailing and/or Physical. If the address is both mailing and physical, you can select both by using the Shift key on your keyboard.
2. Enter **Address Effective Date.** This field is required.
3. Enter **Address Line 1**.
4. Enter **Address Line 2**. This field is not required but can be used to enter information such as Apartment Number or Suite Number.
5. Enter **City, State** and **Zip Code.**
6. Click the **Submit** button.

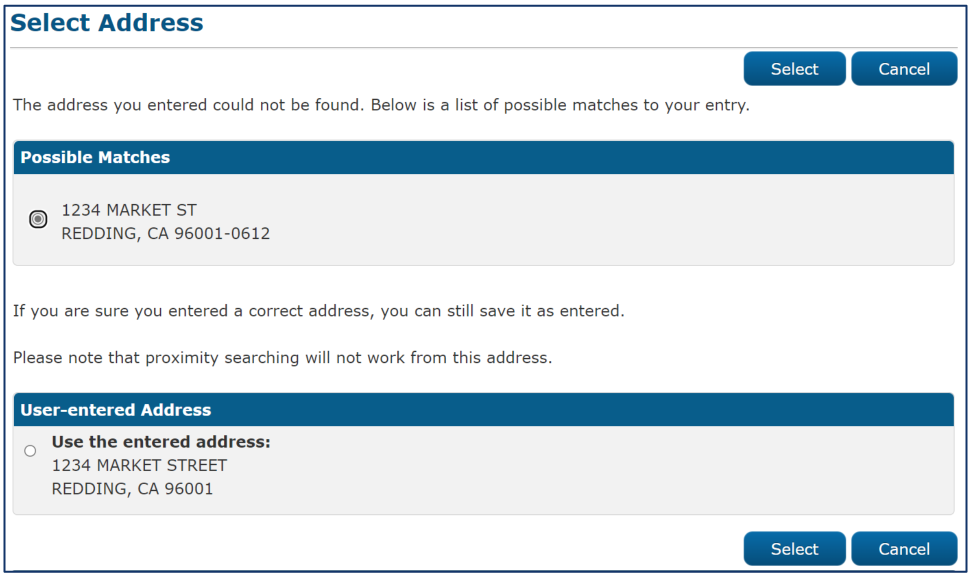


Figure 22 – Select Address Page – Create Mode

Select Address

On the **Select Address** page:

1. Review the result details. CalSAWS attempts to match addresses with those known to the United States Postal Service (USPS). Any time an address is entered or updated in CalSAWS, this page will display. This page can assist in ensuring correct address entries. If the USPS does not have an exact match, it will list possible matches. You can either select a Possible Match or select the User-entered Address. Once an option is selected:
2. Click the **Select** button.

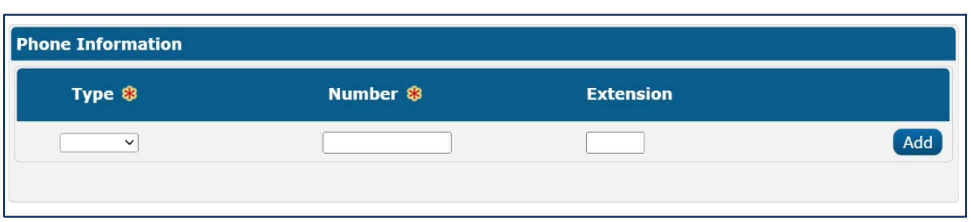


Figure 23 – Office Detail Page – Phone Information Section – Create Mode

On the **Office Detail** page, **Phone Information** section:

1. Select **Type**. Options include Fax, Main, TDD, Toll Free and Work. All Offices **must** have at minimum, a Main phone number.
2. Enter **Number**. This field requires a 10-digit number, you do not need to enter the dashes.
3. If applicable, enter **Extension**.
4. To add additional numbers, select the **Add** button and follow steps 1 through 3.

Figure 24 – Office Detail Page – Office Relationship Section

Office Relationship Detail

On the **Office Detail** page, **Office Relationship** section:

1. To add an **Office Relationship,** click the **Add** button.

Figure 25 – Office Relationship Detail Page – Create Mode

The **Office Relationship Detail** page allows you to associate offices that have related duties/functions and programs. Office relationships are **not** required. The following relationships are available:

- CalWORKs to WTW
- WTW to WTW Region's Cashier Office
- Office to District Office
- Office to Centralized Office

On the **Office Relationship Detail** page:

1. Select **Type**.
2. **Select Office 2**. Office 1 is pre-defined. You will use the Select/Search feature to enter Office 2.

3. Click the **Save and Return** button.

Note: Once you click the **Save** button CalSAWS will generate the Office ID.

Page Location

Global: Admin Tools
Local: Office Admin
Task: Office

Section Configuration

Overview

Sections are a level of organization between an Office and a Unit. Sections are also used for 2nd Level Authorization, as CalSAWS looks for the 2nd Level in the same Office and Section, as a worker. If your county structure does not include Sections and you want to utilize 2nd Level Authorization, a single Section can be created, and all county offices can be associated with that Section.

Note: To utilize 2nd Level Authorization a position that accepts 2nd Level Authorization will need to be assigned within the same Office and Section.

Section Search

Figure 26 – Section Search Page

The **Section Search** Page allows staff to search for current sections in the system. The available search criteria include Section ID, Section Name, Section Type and County. Before you can Create a Section, you must first conduct a Section Search. On the **Search Results Summary** you will determine if the Section already exists or must be added. To create a Section:

On the **Section Search** page, **Search Results Summary**:

1. Click the **Add Section** button.

Section Detail

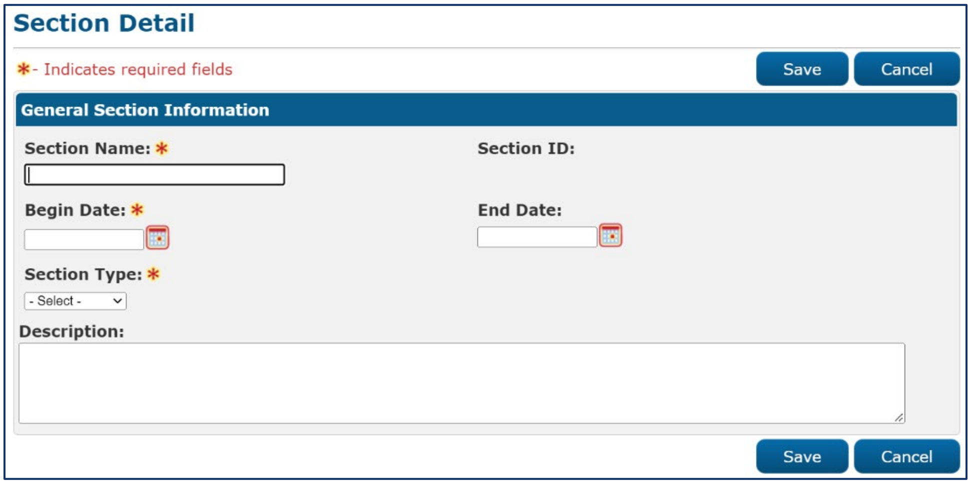


Figure 27 – Section Detail Page – Create Mode

On the **Section Detail** page, **General Section Information**:

1. Enter **Section Name**. This is a free form field, defined by the County.
2. Enter **Begin Date**. This will establish the starting date of this Section in CalSAWS.
3. Select **Section Type**. These types are defined at the project level. If additional types are needed, the county would need to follow the SCR process.
4. Enter **Description**. This is a free form text field that allows the County to define each Section.
5. Click the **Save** button.

   Note: Once saved, CalSAWS will create a Section ID.

Page Location

Global: Admin Tools
Local: Office Admin
Task: Section

Unit Configuration

Overview

Continuing with the Configuration flow, Units will be created to ultimately be assigned to Offices. Information necessary to start Unit Configuration in CalSAWS includes Unit ID, Unit Type, Department and Begin Date. Once this information is defined, you will be ready to create a Unit in CalSAWS.

Note: Unlike Office Configuration, CalSAWS does not assign Unit ID's. This item is configurable by the County. The Unit ID is a two-digit field. This ID can be alphabetic, numeric or alpha-numeric. During migration, all existing units will convert to CalSAWS.

This guide provides the details needed to add additional Units if/when needed.

Unit Search

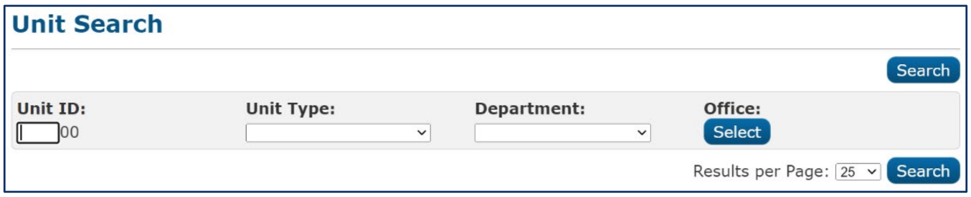


Figure 28 – Unit Search Page

The **Unit Search** Page allows staff to search for current Units in the system. The available search criteria include Unit ID, Unit Type, Department and Office. Before you can Create a Unit, you must first conduct a Unit Search.

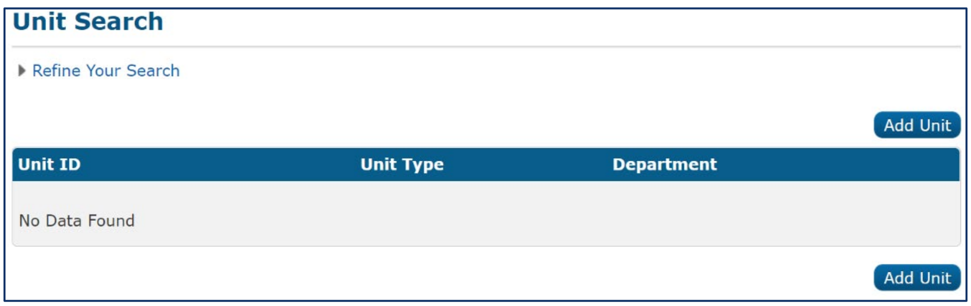


Figure 29 – Unit Search Page – Results

After you have conducted a Search, on the **Unit Search** page:

1. Click the **Add Unit** button.

Unit Detail

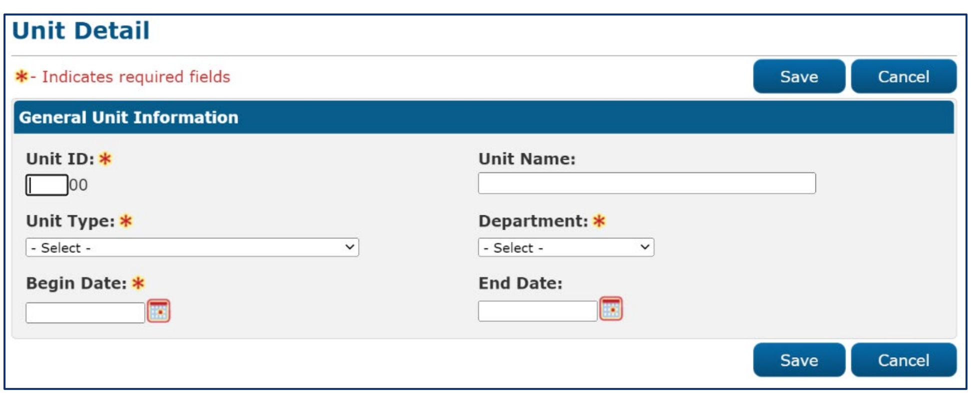


Figure 30 – Unit Detail Page – Create Mode

On the **Unit Detail** page, **General Unit Information**:

1. Enter **Unit ID**. This is a free form field, defined by the County. As mentioned previously, this is a two-digit field that can be alphabetic, numeric, or alpha-numeric.
2. Enter **Unit Name**. This is a free form field, defined by the County.
3. Select **Unit Type**. Unit types are defined at the project level. If additional types are needed, the county would need to follow the SCR process.
4. Select **Department.** Departments are defined at the Project level.
5. Enter **Begin Date**. If a Unit is no longer used, this is also where you would enter the Unit **End Date**.
6. Click the **Save** button.

Page Location

Global: Admin Tools
Local: Office Admin
Task: Unit

Position Configuration

Overview

At a minimum, the information required to add a **Position** to an Office, Section and Unit include Office Name and ID, Unit ID, Position Status, does the position receive In-Home Supportive Services (IHSS) Referrals and Phone Information. Once this information is defined, you will be ready to create a **Position** in CalSAWS. Proper configuration of a **Position** ensures that appropriate staff assigned to the Position can receive specific types of tasks. If action is taken to modify the category of the Task Type on the Task Type Detail page, the Task Category section of the **Position** configuration must also be updated.

Note: A position is not a person. A position in CalSAWS refers to a grouping of one or more functional roles with related tasks that are assigned certain Security Rights.

This guide provides the details needed to add additional Positions if/when needed.

Position Search

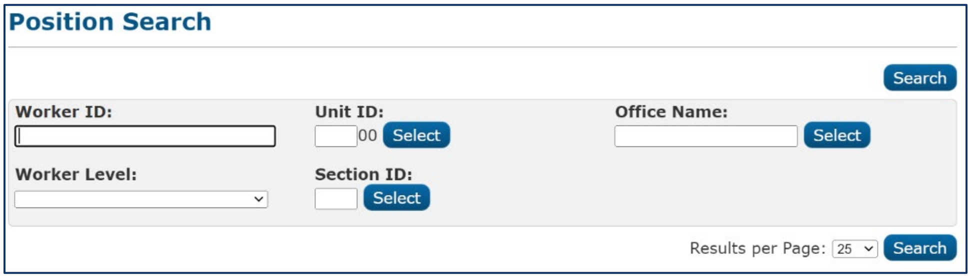


Figure 31 – Position Search Page

The **Position Search** Page allows staff to search for current Positions in the system. The available search criteria include Worker ID, Unit ID, Office Name, Worker Level and Section ID. Before you can Create a Position, you must first conduct a Position Search.

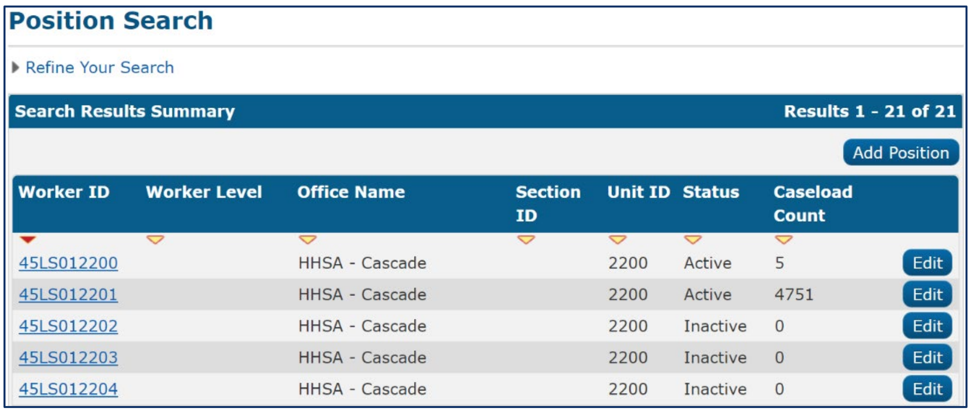


Figure 32 – Position Search Page – Search Results Summary

On the **Position Search** page, **Search Results Summary** section, you will determine if the Position already exists or must be added. To create a Position:

Figure 33 – Position Search Page – Search Results Summary – Add Position Button

On the Position **Search** page, **Search Results Summary**:

1. Click the **Add Position** button.

Position Detail

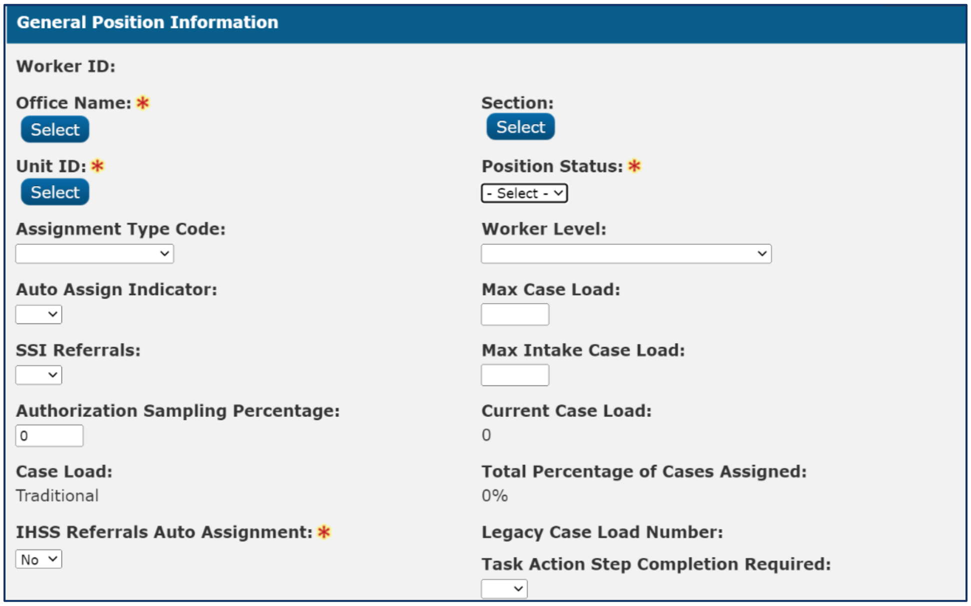


Figure 34 – Position Detail Page – General Position Information Section – Create Mode

On the **Position Detail** page, **General Position Information**:

1. Select **Office Name**. Utilize the Select/Search functionality.
2. Select **Section**. Sections are not required.
3. Select **Unit ID**. Utilize the Select/Search functionality.
4. Select **Position Status.** Options available are Active and Inactive. The Status must be Active for the Position to accept automatic program assignments.
5. Select **Assignment Type Code**. Assignment Type Codes are defined by the Project. The options are Intake, Continuing, Intake & Continuing.
6. Select **Worker Level**. This is not a required field.
7. Select **Auto Assign Indicator**. The options for this field are Yes or No. This field is related to the automatic assignment of designated program(s).
8. Enter **Max Case Load**. This does **NOT** represent a hard cap on how many cases a worker can be assigned. This is used in calculating Caseload Percentage for automatic assignment to choose between two (or more) workers when all other criteria are equal. Caseload Percentage is based on the number of CASES assigned to the worker, NOT the number of PROGRAMS. The Project recommends making all positions, in each office that accept automatic assignment, have the SAME Max Case Load (blank will work). This will result in a Round Robin assignment of cases. This is the simplest approach, and you can manually move cases around from there as needed.
9. Enter **Authorization Sampling Percentage**. This is a free form field that defines the percentage of cases that will require Supervisor Authorization.
10. Select **IHSS Referrals Auto Assignment**. Options include Yes and No.
11. Select **Task Action Step Completion Required**. Options include Yes and No. This field is related to Task Action Steps that may be configured during Task Creation. If Yes, the position you are creating will be required to complete the Task Action Steps, as defined

during task creation, before a task can be marked as complete. This field is not required.

Figure 35 – Position Detail Page – Appointment Threshold Section – Create Mode

Although not required, you can establish the maximum number of appointments a Worker assigned to the Position can attend daily on the **Appointment Threshold** section of the **Position Detail** page.

The information collected prevents batch jobs from scheduling more appointments than those specified by you.

Note: Although you can enter information for multiple appointment categories and types, this functionality is (currently) only available for CalWORKs and CalFresh Redetermination appointments:

- General Appointment – Reaffirmation Non-Group
- General Appointment – Telephone Interview Recertification

If appointments that fall within these two Types have been scheduled manually, batch schedules the difference with respect to the **Daily Threshold** amount. For example, if a worker has 3 Telephone Interview Recertification appointments scheduled for a given day, and the worker's Daily Threshold Limit is 5, batch may schedule the 2 remaining appointments.

Leaving the Daily Threshold field blank (or with no value) allows batch to schedule as many appointments as necessary. If you do not want any appointments to be scheduled by batch, enter a "0" in the Daily Threshold field for the appropriate appointment Category.

On the **Position Detail** page, **Appointment Threshold** section:

1. Select **Category**.
2. Select **Type**.
3. Enter **Daily Threshold**.

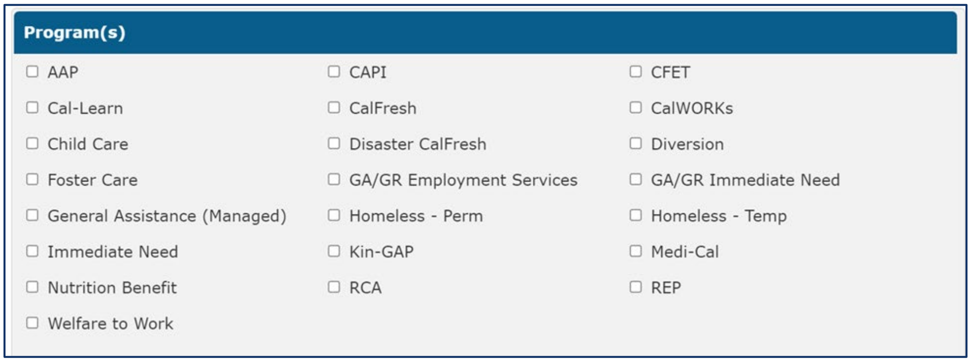


Figure 36 – Position Detail Page – Program(s) Section - Create Mode

On the **Position Detail** page, **Program(s)** section:

1. Select the **Program(s)** that will be assigned to this Position by clicking the check box next to the program(s). You will need to select every Program associated with the Position being created to allow the System to automatically assign these Programs to the Position. For example, when creating a CalWORKs Position, you may need to add the following programs:
    - CalWORKs
    - Immediate Need
    - Homeless – Perm
    - Homeless – Temp

   The Staff assigned to this Position would then have the rights to work in all selected Programs and issue all associated types of payment. Follow your County's policy regarding Program Assignment.

Note: Automatic Assignment of programs will only occur for programs assigned to the position.

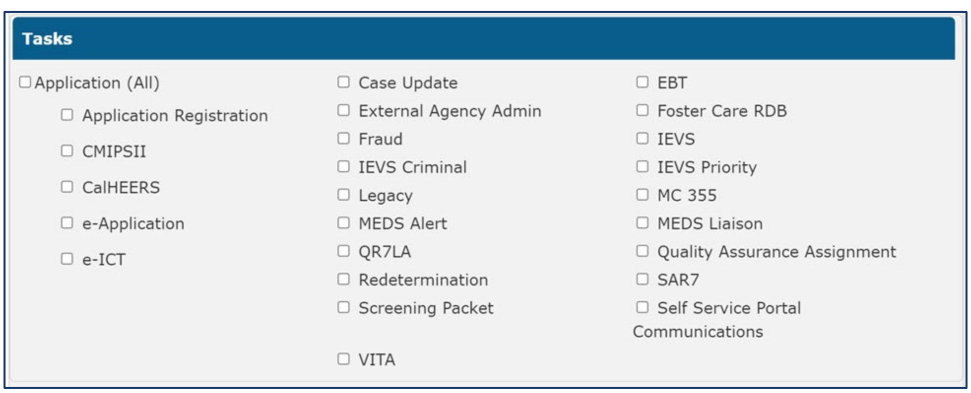


Figure 37 – Position Detail Page – Tasks Section – Create Mode

On the **Position Detail** page, **Tasks** section:

1. Select **Tasks,** by clicking the corresponding check box.

2. **Note:** The **Tasks** section allows a position to be configured to receive one or more categories of tasks. Positions expected to utilize the **Get Next** functionality or Office Distribution / Eligible Positions assignment methods will need to be configured with the appropriate Task Categories the position can receive.
3. **Note:** Each county requires at least one Active Position with the "External Agency Admin" Task Category selected in order to route the "Request to create a CBO account" Tasks from BenefitsCal appropriately.

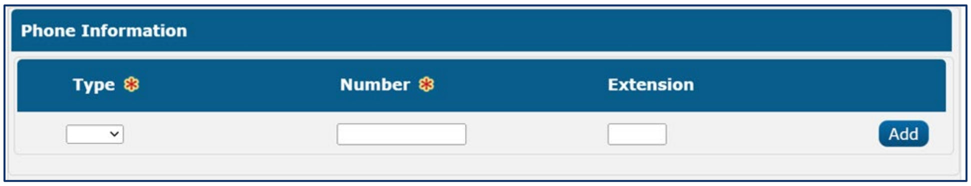


Figure 38 – Position Detail Page – Phone Information Section – Create Mode

On the **Position Detail** page, **Phone Information** section:

1. Select **Type** (Options include Fax, Main, TDD, Toll Free and Work). All Positions **must** have at minimum, a Main phone number.
2. Enter **Number**. This field requires a 10-digit number, you do not need to enter the dashes.
3. If applicable, enter **Extension**.
4. To add additional numbers, select the **Add** button and follow steps 1 through 3.

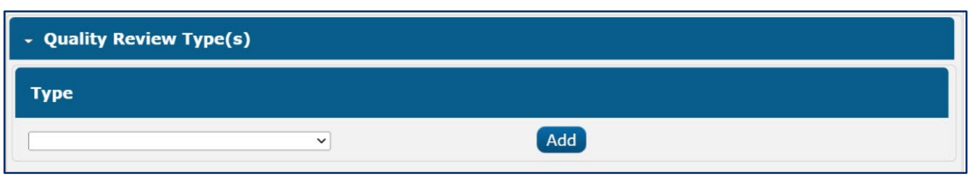


Figure 39 – Position Detail Page - Quality Review Type(s) Section - Create Mode

On the **Position Detail** page, **Quality Review Type(s)** section:

1. Select **Type**.
2. To add more than one **Quality Review Type**, click the **Add** button and repeat step

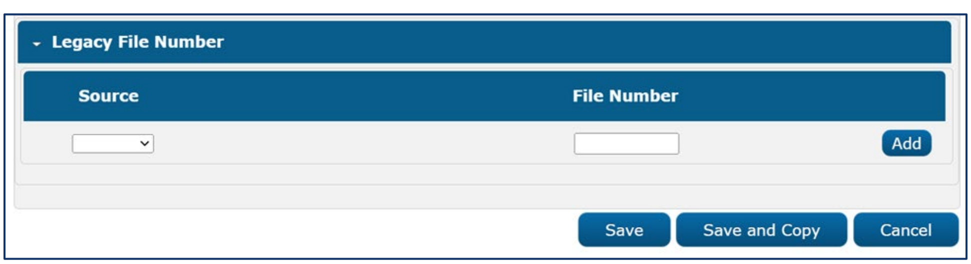


Figure 40 – Position Detail Page – Legacy File Number Section – Create Mode

On the **Position Detail** page, **Legacy File Number** section:

1. Select **Source**.
2. Enter **File Number.**
3. Click the **Save** button.

Note: The **Save and Copy** button is also available and can be used to create a duplicate Position record. You will be able to make appropriate changes if necessary. This feature provides efficiency when creating several of the same type of position, an Eligibility Worker, for example.

Page Location

Global: Admin Tools
Local: Office Admin
Task: Position

Staff Assignment

Overview

Staff Assignment is where we put all the pieces together. Once Staff Assignment is complete, a unique Worker ID will be issued. This ID is comprised of the County ID, Department ID, Office ID, Unit ID and Position ID. As an example; County ID(45), Eligibility Services (LS), Breslauer Office(01), Unit (22), Position (0A) for a resulting Worker ID of 45LS01220A.

Staff may be assigned to more than one Position. Each Position will have a unique Worker ID. The information necessary (at a minimum) for the Staff member to be assigned to a vacant position includes Name of Staff to be assigned, Department ID and Unit ID.

Staff Assignment List

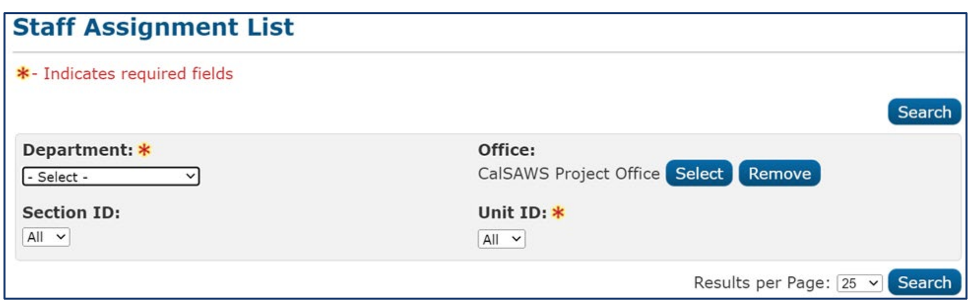


Figure 41 - Staff Assignment List Page

The **Staff Assignment List** page allows users to conduct a Staff Assignment Search by selecting the Department, Office, Section ID and Unit ID and clicking the **Search** button.

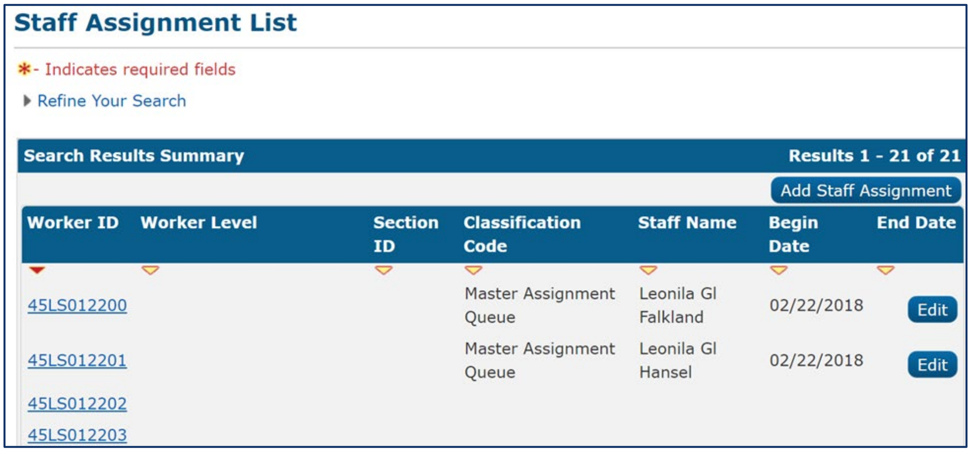


Figure 42 – Staff Assignment List Page – Search Results Summary

On the **Staff Assignment List** page, **Search Results Summary** section, you will determine what Worker ID's are available to be assigned. To create a Staff Assignment:

On the **Staff Assignment List** page, **Search Results Summary**:

1. Click the **Add Staff Assignment** button.

Staff Assignment Detail

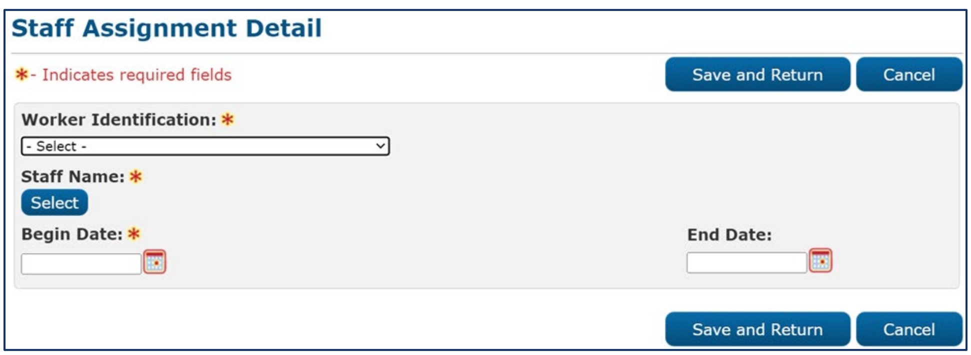


Figure 43 – Staff Assignment Detail Page – Create Mode

On the **Staff Assignment Detail** page:

1. Select **Worker Identification**. This will be the resulting User ID for your Staff Member.
2. Select **Staff Name**. Utilize the Select/Search functionality.
3. Enter **Begin Date**. If a Staff member changes assignment or is no longer on staff, you would enter the End Date here.
4. Click the **Save and Return** button.

Page Location

Global: Admin Tools

Local: Office Admin
Task: Staff Assignment

Bank Configuration

Overview

Banks in CalSAWS are referred to as Task Banks. The only function of Banks is to hold tasks. These Banks allow tasks to be assigned to a shared repository that Users can pull from. Users directly associated with the Bank, or by way of a Unit or Office association, will comprise the total number of Users associated with the Bank. A Task Bank is associated to a main Office/Unit to establish a Bank ID; additional offices/units can also be added to a Bank. When a User associated with the Bank clicks the "Get Next" button, any Bank associated with that User will be a source for task self-assignment. For example, the county could create a Bank called SAR7 Bank. All SAR7's received by the county would have a task created and that task would be assigned to the SAR7 Bank. Any User that is responsible for working SAR7 tasks would be associated to the SAR7 Bank. Once associated the tasks in the SAR7 bank could be assigned through "Get Next". Workers who utilize the Get Next function must be associated to at least one Task Bank. The Get Next functionality is not required, Banks can still be used to hold tasks for manual or automated workload assignment. Note that Task Banks cannot be removed once created.

Note: If action is taken to modify the category of Tasks held in a Task Bank on the Task Type Detail page, Users will need to ensure that the Task Category selection is also reflected in the relevant Bank configurations. The Office Distribution assignment method is reliant on Task Banks being configured with the appropriate task categories for a task to route.

Bank Search

Figure 44 – Bank Search Page

The **Bank Search** page allows users to conduct a Bank search by entering Bank ID, Bank Name, Unit ID, Office Name and clicking the **Search** button.

Note: On initial load, the **Office Name** field will be populated with the name of the logged in User's office.

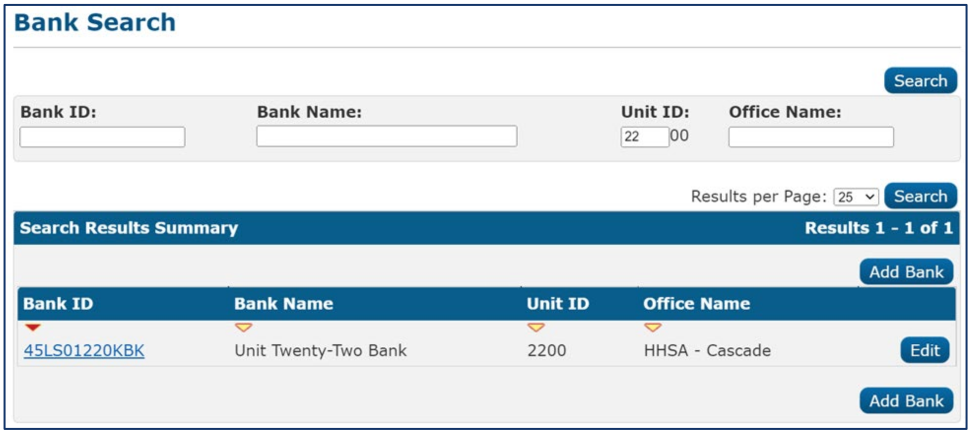


Figure 45 – Bank Search Page – Search Results Summary

On the **Bank Search** page, **Search Results Summary** section, you will determine if the desired Bank already exists or must be added. To create a new Bank, click the **Add Bank** button.

Note: If you need to edit details for an existing Task Type, click the **Edit** button. Once a bank has been created, it cannot be removed. The Add and Edit buttons, in addition to the **Name** hyperlink, will navigate to the **Bank Detail** page.

Bank Detail

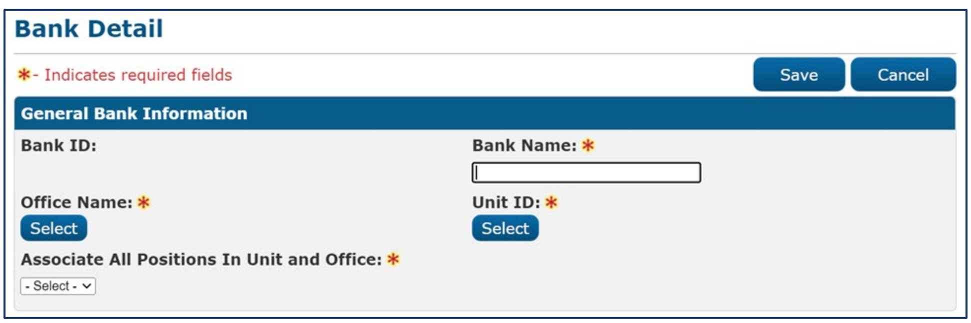


Figure 46 – Bank Detail Page – Create Mode

On the **Bank Detail** page, **General Bank Information** section:

1. Enter **Bank Name**. This is a free form text field which is configurable by the County.
2. Select **Office Name**. Use the Select/Search functionality.
3. Select **Unit ID**. Use the Select/Search functionality.
4. Select **Associate All Positions In Unit and Office**. When a Bank is initially created, and this field is entered as Yes, all Positions within the selected Office and Unit are automatically associated to the Bank.

Note: The **Bank ID** will automatically be created by CalSAWS and does not require User input.

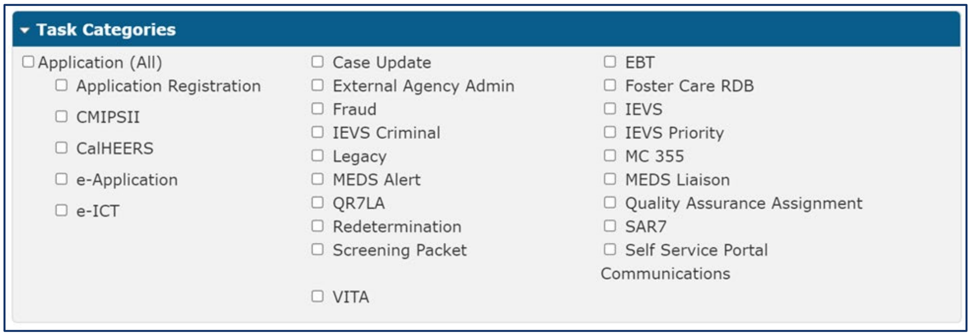


Figure 47 – Bank Detail Page – Task Categories Section– Create Mode

On the **Bank Detail** page, **Task Categories** section:

1. Select the **Task Categories** that will be assigned to this Bank by clicking the check box next to the Task Category(ies). Automatic Assignment of tasks will only occur for Task Category(ies) assigned to the Bank.

Figure 48 – Bank Detail Page – Additional Associations Section

The **Bank Detail**, **Additional Associations** section, allows Users to add and/or remove Worker, Unit, or Office associations to the Bank. To Add an association:

On the **Bank Detail** page, **Additional Associations** section:

1. Click the **Add** button.

Figure 49 – Bank Detail Page- Additional Associations Section – Create Mode

1. Select **Level**. The Level indicates whether the row represents a Worker, Unit, or Office. The Number and Name columns display the attributes of the worker, unit, or office added as an association.
2. If **Additional Associations** are needed, select the **Add** button and repeat step 1.

Note: Additional Associations can be removed once added by clicking the **Remove** button in the **Additional Associations** section.

Figure 50 – Bank Detail Page – Excluded Associations Section

The **Bank Detail**, **Excluded Associations** section, allows Users to add and/or remove worker and/or unit exclusions for the Bank. For example, if only 35 out of 40 workers within a particular Office will be associated to a Bank, the Office can first be associated to the Bank, then the 5 individual workers who should not be associated can be individually entered into the Excluded Associations section. To Add and Excluded Association:

1. Click the **Add** Button.

Figure 51 – Bank Detail Page – Excluded Associations Section – Create Mode

1. Select **Level**. The Level indicates whether the row represents a Worker, Unit, or Office. The Number and Name columns display the attributes of the worker, unit, or office added as an Excluded Association.
2. If additional **Excluded Associations** are needed, select the **Add** button and repeat step 1.
3. Click the **Save** button.

Page Location

Global: Admin Tools
Local: Office Admin
Task: Bank

Task Management Configuration

Overview

Task Management Configuration allows CalSAWS Users to utilize available automation to assist in workload management. Topics include Task Types, Automated Actions, Task Settings, Get Next, Document Routing Rules, and Task Reassignment Options. The topics included have been determined to have the highest impact to Users.

Task Types

Key Considerations

- Task Types must be configured by each County to proceed with using Task Management functionality.
- Creation of Task Types is a prerequisite for configuring automated and manual tasks.
- Each Task Type must be associated to a Task Category, which directly impacts task assignment processing.
- Task Type configurations determine the time of task expiration as well as how long a task will display as newly assigned.
- Each county will have an initial set of read only "System" Task Types.
- Append functionality, while not necessary for configuration of Task Types, enables the consolidation of tasks.
- Although Task Sub-Types are not necessary for configuration of Task Types, Task Sub-Types allows counties the ability to configure multiple Sub-Types under one parent Task Type. Note in this instance that Sub-Type priority, if specified, drives priority of the task.

Overview

Task Types are defined by each County and are required to configure Automated Actions, Document Routing Rules, and manually created tasks. Configuration of a Task Type's **Task Category** directly impacts the **Office Distribution** task assignment processing, which will be reviewed next in this document under Automated Action functionality, and **Get Next** functions, which will be reviewed in its designated section later in this document. Configuration of Task Types will determine when a task of a particular Task Type expires as well as how long a task will display with the newly assigned indicator.

Configuration of **Task Sub-Types** is also possible in CalSAWS. A Task Sub-Type is an ***optional*** level of Task Type configuration that allows the counties to set up a granular level of Task Sub-Types grouped within a parent Task Type. For example, a Task Type of "Document Received" may have Sub-Types such as "SAR 7", "MAGI RE Packet" and "CW/CF RE Packet". An alternative approach to the same example is to create three separate Task Types ("SAR 7", "MAGI RE Packet" and "CW/CF RE Packet" without the use of Sub-Types. Counties may opt to utilize Task Sub-Types as needed.

Each county will have an initial set of read only Task Types to support very specific CalSAWS task processing such as for the Clearance and Intake Automated Actions. These Task Types are strictly to support these processes.

The following pages enable the search and customization of Task Types or Sub-Types in CalSAWS: **Task Type List**, **Task Type Detail**, and **Task Sub-Type Detail** pages.

Task Type List Page

The **Task Type List** page displays Task Types that have been defined by the County. From this page, Users can search, view, edit, and add new Task Types.

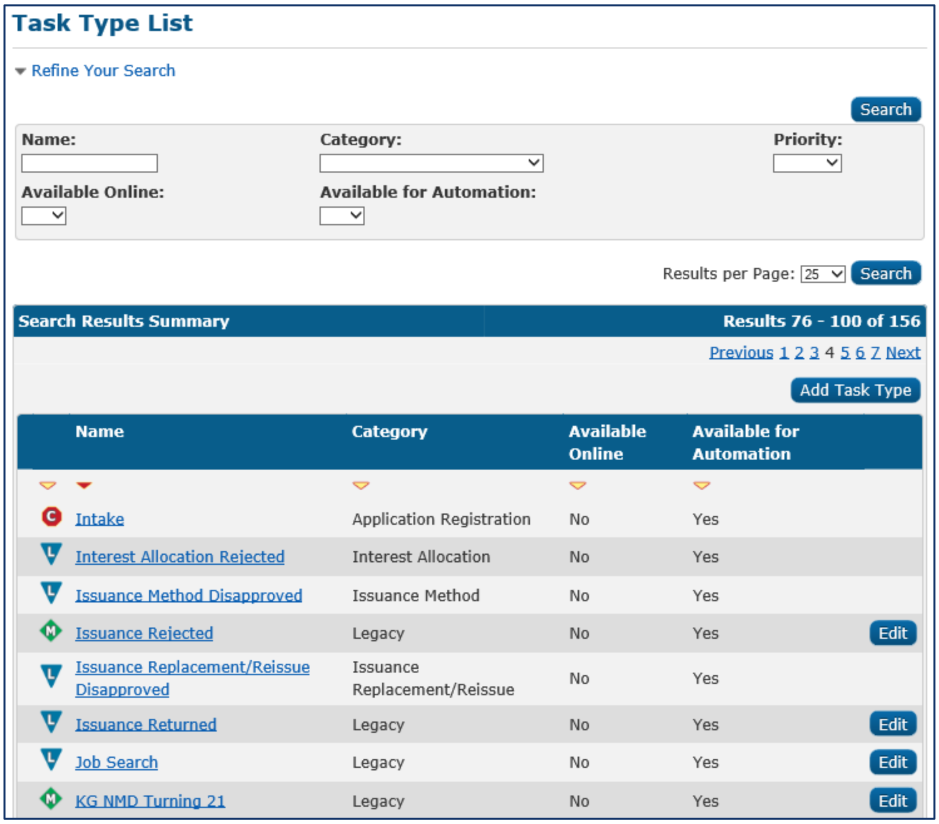


Figure 1 – Task Type List Page

Refine Your Search Section

The **Refine Your Search** section is an expandable section that allows Users to refine a search by the **Task Type Name**, **Category**, **Priority**, and whether the task is **Available Online** or **Available for Automation**.

Search Results Summary

The **Search Results Summary** section will paginate Task Types with 25 results per page. On initial load, the section will display all Task Types for the County alphabetically. The **Priority**, **Name**, **Category**, **Available Online**, and **Available for Automation** columns are all sortable for the results. To create a new Task Type, click the **Add Task Type** button in this section. To edit details for an existing Task Type, click the **Edit** button. These buttons, in addition to the **Name** hyperlink, will navigate to the **Task Type Detail** page.

A Task Type created by the county that has not been associated to a Task or Automated Action will display a checkbox at the beginning of the row which allows the county to remove the Task Type if needed.

Page Location

- **Global**: Admin Tools
- **Local**: Admin
- **Task**: Tasks > Task Types

Task Type Detail Page

The **Task Type Detail** page is accessible from the **Task Type List** page. This page is used to capture and display detailed information about the Task Type.

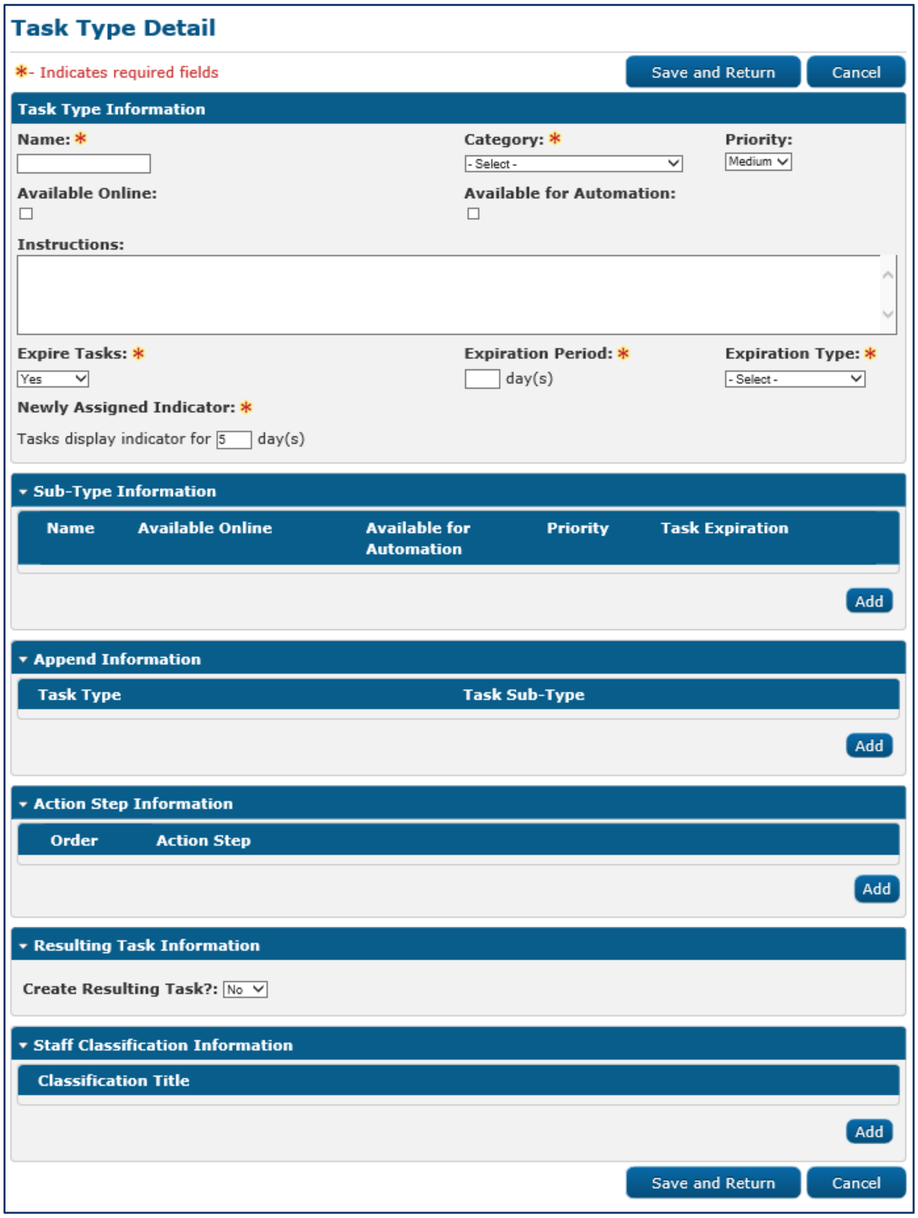


Figure 2 – Task Type Detail Page – Create Mode

Task Type Information Section

The **Task Type Information** section at the top of the page displays various Task Type attributes, including **Name**, **Category**, **Priority**, **Available Online**, **Available for Automation**, **Instructions**, **Expire Tasks**, and **Newly Assigned Indicator**. When creating a new Task Type, Users must specify a **Name** and **Category** for the Task Type, as well as whether the Task Type will expire and for how long the newly assigned indicator will display.

The **Category** is an attribute of a Task Type that can only be viewed/configured on the **Task Type Detail** page. Task Categories can also be associated to Task Banks on the **Bank Detail** page and to Positions on the **Position Detail** page. Task Category configurations are important because they directly impact the **Office Distribution** task assignment and **Get Next** processing. The determination of if a Position or Task Bank can receive a task is done by comparing the Task Category of the Task Type to the Task Categories selected for a Position or Task Bank.

> **Note on Task Categories:** Counties planning to use the Office Distribution Task assignment or Get Next functionalities will need to take note of the Task Categories that are associated to the Task Types. This is necessary so that any Task Banks expected to receive these Tasks through the Office Distribution processing are configured for the appropriate Task Category(ies). Similarly, Positions expected to receive these types of Tasks via Get Next will also need to be configured with the appropriate Task Category(ies).

The **Available Online** attribute controls whether a Task Type is selectable on the **Task Detail** page while manually creating/editing a task. The **Available for Automation** attribute controls whether a Task Type is available for use in Automated Actions that create tasks.

> **Note on Available for Automation:** Prior to activating/configuring any Automated Actions, counties must create one or more Task Types with the Available for Automation selected on the Task Type Detail page. This is necessary for the Task Type required dropdown field on the Automated Action Detail page to include Task Type options.

The **Expire Tasks** field controls whether a task can expire after a period of time. If the **Expire Tasks** field is set to **Yes**, the dynamic **Expiration Period** and **Expiration Type** fields will display. The **Expiration Period** field allows the county to define a number of days that can elapse before task expiration. The **Expiration Type** field allows the county to define if the expiration date is calculated from the day the task is created/starts or from the date the task program is closed.

Sub-Type Information Section

The **Sub-Type Information** section is an ***optional*** expandable section available on the **Task Type Detail** page that displays Task Sub-Types for the specified Task Type. The **Name**, **Edit**, and **Add** buttons in this section navigate to the **Task Sub-Type Detail** page, as shown in more detail in the next section.

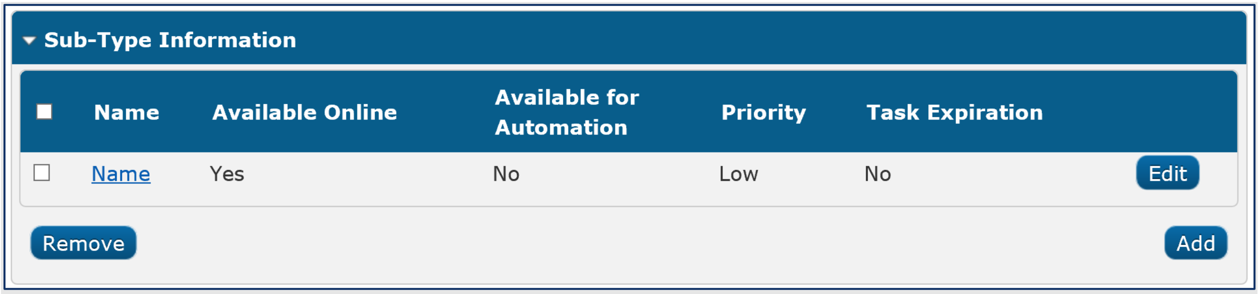


Figure 3 – Task Type Detail - Sub-Type Information Section

Append Information Section

The **Append Information** section is an ***optional*** expandable section available on the **Task Type Detail** and **Task Sub-Type Detail** pages. In this section, Users can designate which Task Types and Sub-Types can be appended to existing tasks instead of creating a new task.

> **Note on Append Functionality:** Append functionality, while not necessary for configuration of Task Types, enables the consolidation of tasks to reduce the volume of tasks. Consolidation of tasks can be particularly helpful in cases of automatic generation of tasks, created through the Automated Action and Document Routing Rule functionality. Counties are encouraged to add Append Information after core configurations are complete and stable.

Example: Suppose an "Images Received" Task Type is configured to Append to itself, meaning the **Append Information** section includes "Images Received" while viewing the **Task Type Detail** page for the "Images Received" Task Type. If the "Images Received" Task Type is associated to a Document Routing Rule with many documents, when the rule is invoked for task creation, if the Case does ***not*** already have an "Images Received" task in an "Assigned" status, then a new task(s) will be created. If the Case already has one or more "Images Received" tasks in an "Assigned" status, these are the append candidate tasks. Processing will append the additional Long Description information to the existing task(s) instead of creating a new task(s).

The **Add** button in this section adds an append instruction, requiring Users to select a **Task Type** and, when applicable, **Task Sub-Type.**

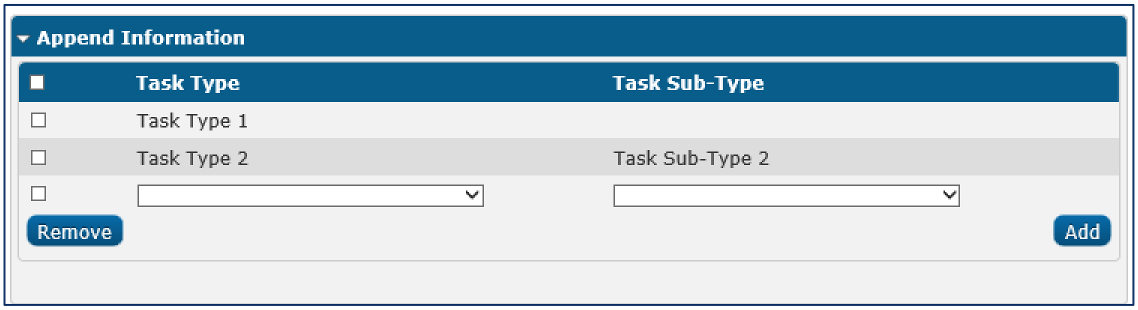


Figure 4 – Task Type Detail Page - Append Information Section

> **Note on Append Processing:** During automated task creation, processing will first check if the Task Type of the to-be task has any append information specified. If information is available, processing will look for **Assigned** tasks on the Case with a Task Type that matches the Append Information. If one or more tasks are found, the **Long Description** of these tasks will be appended to with the additional information, a new Task will not be created. If existing tasks are not found, task creation will proceed normally.

Action Step Information Section

The **Action Step Information** section is an ***optional*** expandable section available on the **Task Type Detail** and **Task Sub-Type Detail** pages that allows Users to configure one or more specific steps that a worker may be required to action prior to completing the task.

> **Note on Action Steps:** Configuration of this Task Management enhancement should only be completed after stabilizing primary Task Management configurations (Automated Actions and Task Banks). This enhancement can be leveraged as an add-on feature and is not required prior to Go-Live. If Users would like to configure Action Steps in the future, they will need to indicate on the Position Detail page that Action Steps are required.

The **Add** button will allow the User to type instructions for the action step. The **Order** column controls order the action step will display on the **Task Detail** page. If the Task Type does not have a Sub-Type, action steps will only be determined from the **Task Type Detail** page.

Similarly, if a Task Type does have a Sub-Type, action steps will only be determined from the **Task Sub-Type Detail** page.

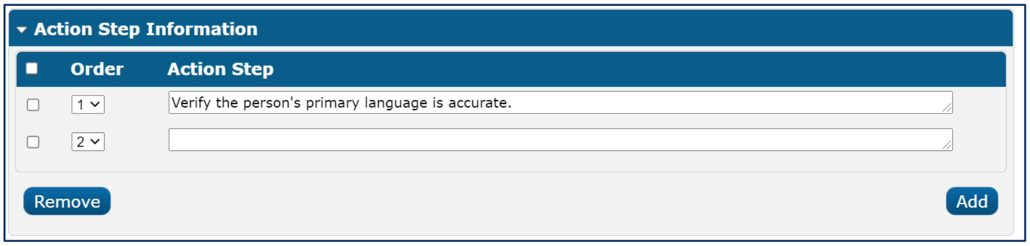


Figure 5 – Task Type Detail Page - Action Step Information Section

Resulting Task Information

The **Resulting Task Information** section is an ***optional*** expandable section available on the **Task Type Detail** and **Task Sub-Type Detail** pages that allows Users to configure a relationship of one task type to another Task Type to build a flow of two or more Task Types/Sub-Types that will be created one after the other as each task within a flow is completed.

> **Note on Resulting Tasks:** Like Action Steps, configuration of this Task Management enhancement should only be completed after stabilizing primary Task Management configurations (Automated Actions and Task Banks). This enhancement can be leveraged as an add-on feature and is not required prior to Go-Live.

The **Task Type** and **Task Sub-Type** drop lists allow Users to select the Task Type and Sub-Type of the resulting task to be created. Other attributes can be used to determine the **Due Date**, **Distribution Type**, and **Long Description** of the resulting task.

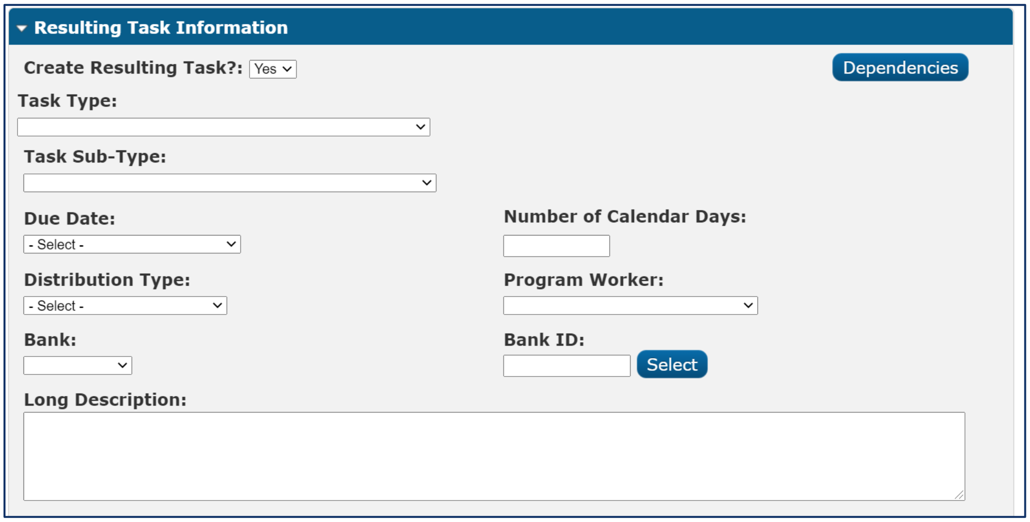


Figure 6 – Task Type Detail Page - Resulting Task Information Section

Staff Classification Information Section

The **Staff Classification Information** section is an ***optional*** expandable section available on the **Task Type Detail** and **Task Sub-Type Detail** pages that allows a Task Type or Task Sub-Type to be configured for specific Staff Classifications. This functionality is used during Office Distribution assignment, assignment to “Eligible Positions” through the Pop-Up: Task Search page and for Task Reassignment instructions set to distribute tasks across a Unit or Office.

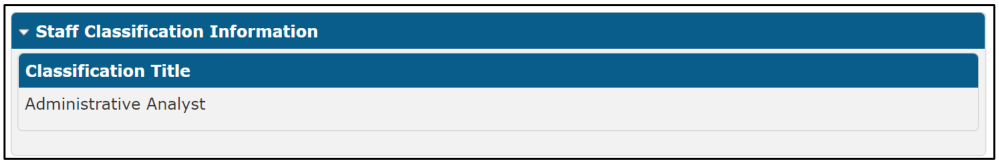


Figure 7 – Staff Classification Information Section on the Task Type Detail Page

Page Location

- **Global**: Admin Tools
- **Local**: Admin
- **Task**: Task > Task Types > Name hyperlink, Add Task Type button, Edit button

Task Sub-Type Detail Page

As noted previously, a Task Sub-Type is an ***optional*** level of Task Type configuration that allows the counties to set up a granular level of Task Sub-Types grouped within a parent Task Type. For example, a Task Type of “Document Received” may have Sub-Types such as “SAR 7”, “MAGI RE Packet” and “CW/CF RE Packet”. The **Task Sub-Type Detail** page is accessible from the **Task Type Detail** page. This page is used to capture and display detailed information about the Task Sub-Type.

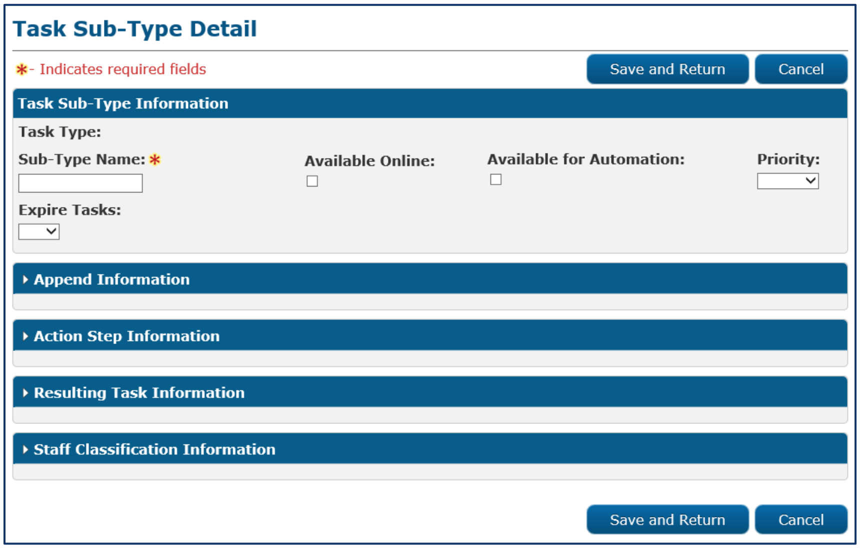


Figure 8 – Task Sub-Type Detail Page – Create Mode

Task Sub-Type Information Section

The **Task Sub-Type Information** section at the top of the page displays various Task Sub-Type attributes, including **Sub-Type Name**, **Available Online**, **Available for Automation**, **Priority**, and **Expire Tasks**. When creating a new Task Sub-Type, Users must specify a **Sub-Type Name**. Note that the priority of the Task Sub-Type, if designated, will drive the priority of the parent Task Type. However, the Sub-Type will be considered as having the same Priority as its parent Task Type is left unspecified.

Page Location

- **Global**: Admin Tools
- **Local**: Admin
- **Task**: Task > Task Types > Add Task Type button > Add button under Sub-Type Information section

Automated Actions

Key Considerations

- Automated Actions cannot be created by Counties. The addition of Automated Actions can only be introduced with an enhancement. Refer to ***Appendix A – Automated Action Inventory*** for a complete list of available Automated Actions.
- Automated Actions are initially **Inactive** by default in CalSAWS.
- Creation of Task Types is a prerequisite for configuring Automated Actions. Task Types must be configured as **Available for Automation** to be used for Automated Actions.
- If the **Office Distribution** assignment is used, Users must configure the appropriate Position(s) and/or Bank(s) to receive the appropriate Task Category(ies).
- If the **Program Worker/Bank** assignment is used, Users will not be able to receive assignment of the task using the **Get Next** function.
- Append functionality, while not required for the initial configuration of Task Types, enables the consolidation of tasks created by Automated Actions.
- Intake Automated Action Tasks cannot route directly into a Task Bank

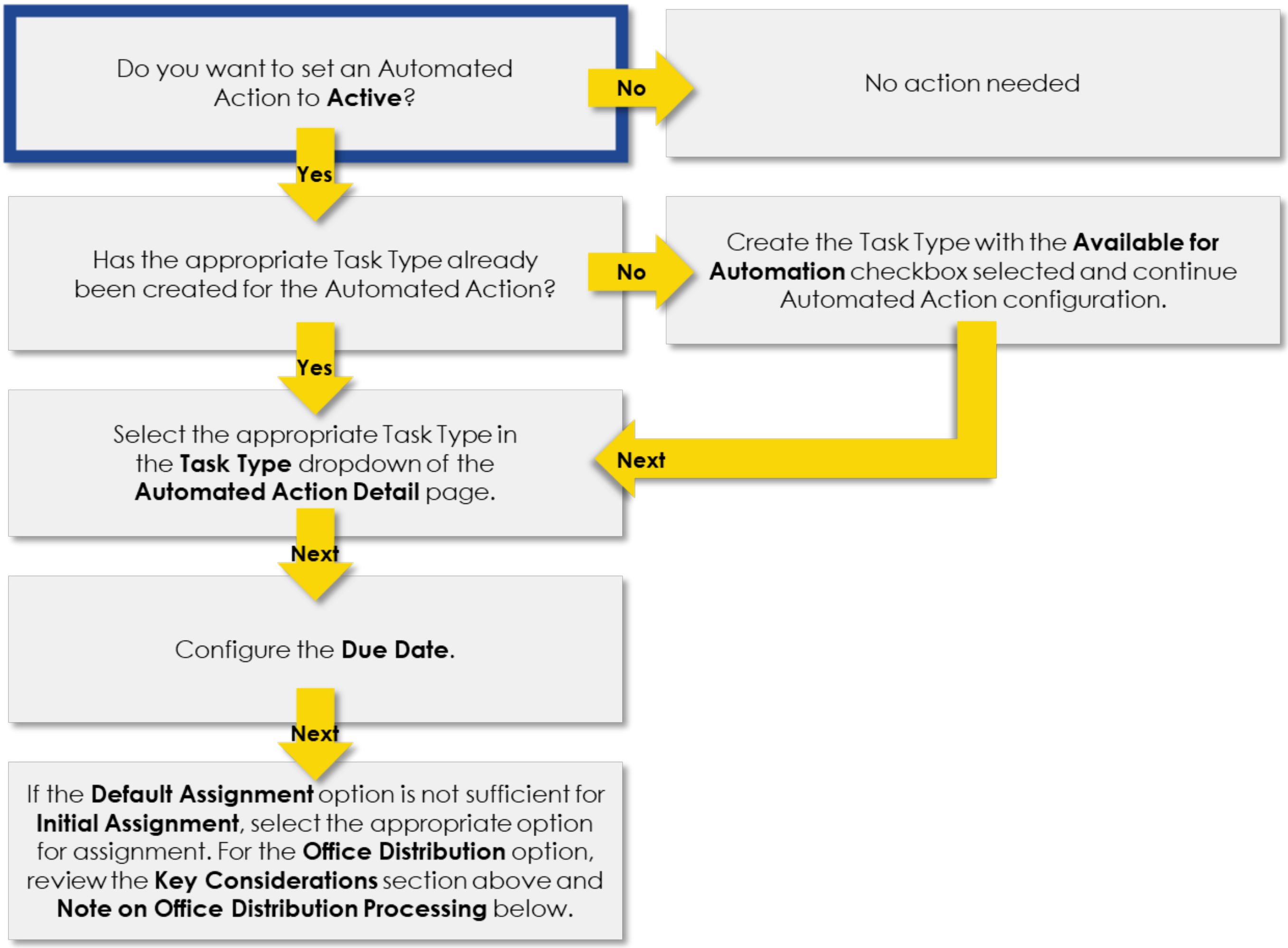
Overview

An **Automated Action** is a county configurable mechanism for CalSAWS to trigger creation of tasks when a predefined trigger event occurs. For example, an **Address Changed** Automated Action may trigger when a person's address information is updated. Counties can turn on/off an Automated Action and configure attributes of the resulting Tasks such as the Task Type, assignment method and due date. Note that CalSAWS Automated Actions have been predetermined in the System. Review ***Appendix A – Automated Action Inventory*** for a complete list of available Automated Actions.

Automated Action types include:

- **Create Task** – Will invoke Task creation processing when triggered
- **Complete Task** – Will invoke Task completion processing when triggered
- **Text Outreach** – Will invoke a Text Outreach message when triggered

Automated Action Configuration Workflow



Clearance and **Intake** Automated Actions are tied to specific CalSAWS logic which is not User-configurable. These Automated Actions can only be Activated/Deactivated by the counties; the remaining attributes will remain static.

> **Note on Intake Automated Action:** The **Intake** Automated Action is triggered when a program is assigned to a Worker on the **Pending Assignment List** page. The resulting tasks are assigned directly to the Worker that is assigned to the program. These tasks cannot be routed directly to a Task Bank at creation. In order to utilize the Get Next functionality with Intake tasks, a subsequent reassignment is necessary to move Intake tasks into a Task Bank.

The following pages enable the search and modification of automated actions in CalSAWS: **Automated Action List** and **Automated Action Detail** pages.

Automated Action List Page

The **Automated Action List** page displays the automated actions that are available in CalSAWS. From this page, Users can search, view, and edit available automated actions. While automated actions have been pre-determined in CalSAWS, Users can modify particular attributes for County use.

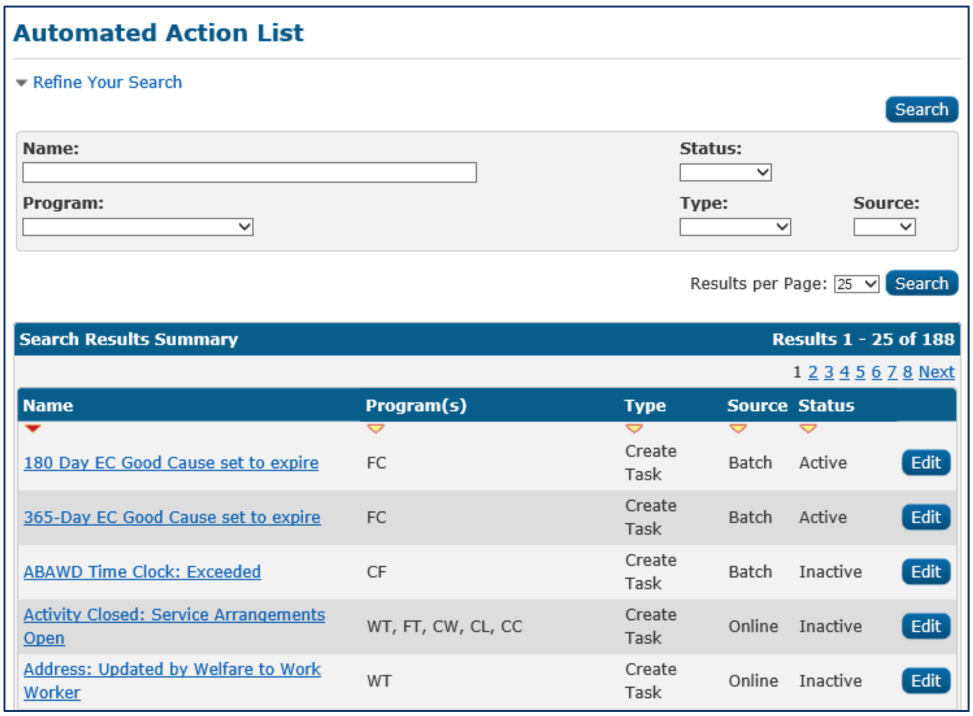


Figure 9 – Automated Action List Page

Refine Your Search Section

The **Refine Your Search** section is an expandable section that allows Users to refine a search by the **Automated Action Name**, **Status**, **Program**, **Type**, and **Source**. The **Status** drop list indicates the status of the automated action and includes the following options: **Active**, **Inactive**, and **Unavailable**. The **Program** drop list filters automated actions by specific programs. The **Type** drop list filters automated action results by automated action type and includes the following options: **Create Task**, **Text Outreach**, and **Complete Task**. The **Source** drop list filters results by automated action source: **Batch** and **Online**.

Search Results Summary

The **Search Results Summary** section will paginate Task Types with 25 results per page. On initial load, the section will display all automated actions for the County alphabetically. The **Name**, **Program(s)**, **Type**, **Sources**, and **Status** columns are all sortable for the results. To view an automated action, click the **Name** hyperlink. To edit an automated action, click the **Edit** button. These buttons will navigate to the **Automated Action Detail** page.

Page Location

- **Global**: Admin Tools
- **Local**: Admin
- **Task**: Automated Actions > Task Admin

Automated Action Detail Page

The **Automated Action Detail** page is accessible from the **Automated Action List** page. This page is used to capture and display detailed information about the automated action.

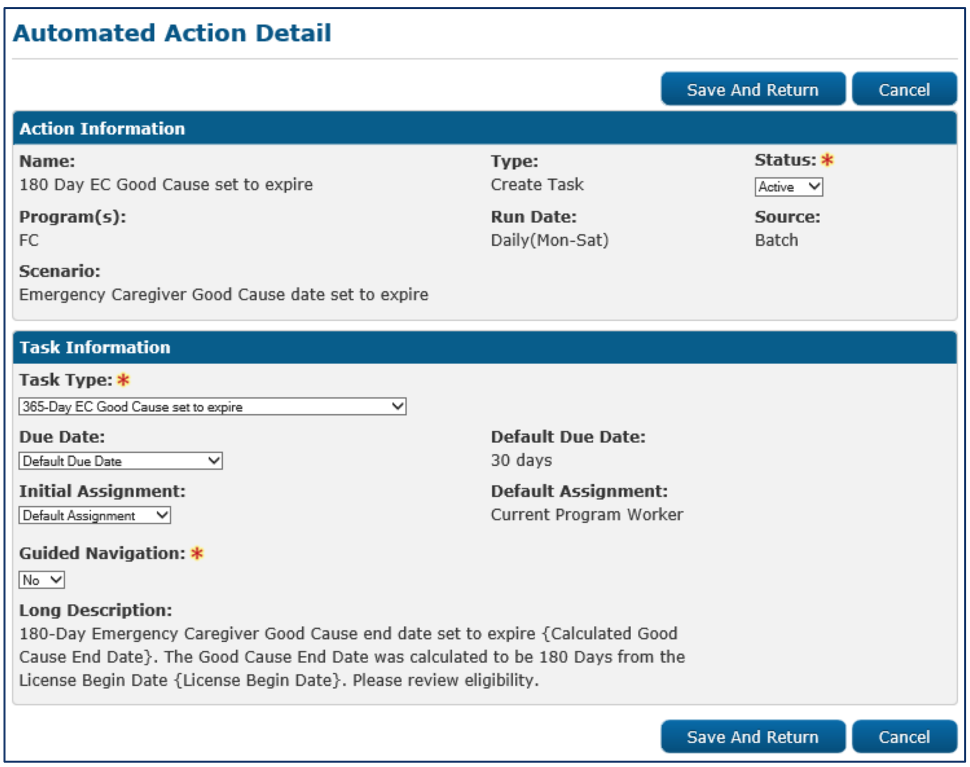


Figure 10 – Automated Action Detail Page – Edit Mode

Action Information Section

The **Action Information** section at the top of the page displays various automated action information attributes, including the **Name**, **Type**, **Status**, **Program(s)**, **Run Date**, **Source**, and **Scenario**. When editing an automated action, Users can alter the status of the action to be

Active or **Inactive**. By default, every automated action in CalSAWS will initially be set to **Inactive**.

Task Information Section

The **Task Information** section displays various editable attributes, including the **Task Type**, **Due Date**, **Initial Assignment**, and **Guided Navigation** of the automated action. The **Due Date** drop list indicate the rule that will be used to set the due date for tasks created by the automated action. Options for Due Date include:

- **Default Due Date** – Will set the due date based on the logic that was determined when the Automated Action was implemented.
- **After Number of Calendar Days** – Will set the due date based on the System date plus the number of calendar days specified by the User.
- **After Number of Business Days** – Will set the due date based on the System date plus the number of business days specified by the User. Business days exclude weekends and County specific holidays.
- **Last Day of Month** – Will set the due date to the last day of the month of the System date.
- **Last Day of Following Month** - Will set the due date to the last day of the month following the month of the System date.

The **Initial Assignment** drop list allows Users to configure how/where tasks generated by the automated action are assigned. **Default Assignment** is the default option for the **Initial Assignment** field, although Users may also select **Program Worker/Bank** and **Office Distribution**. Assignment configurations made by selecting **Program Worker/Bank** for an automated action do not evaluate the **Task Category** during assignment. However, selecting **Office Distribution** does rely on the **Task Category** assignment to identify a Worker or Bank that can receive a task.

> **Note on Office Distribution Processing:** When **Office Distribution** is selected, CalSAWS will determine the case carrying worker by evaluating a hierarchy of the programs associated to the case and retrieving the worker associated to the **highest priority program** (see ***Appendix B – Program Hierarchy*** for a complete list of program priority). If the case carrying worker can accept* the task, CalSAWS will assign the task. If the case carrying worker cannot accept the task, CalSAWS will attempt to assign the task to a worker in the case carrying worker's Unit who can accept the task. If the task still has not been assigned, CalSAWS will retrieve Banks for the case carrying worker's Office and attempt to assign the task to one of the Banks that can receive the task. If there are no valid Banks, CalSAWS will attempt to assign the task to a worker in the case carrying worker's Office who can receive the task, otherwise CalSAWS will assign the task to the Office Supervisor.
>
> *References above to a worker or Bank that "can accept" a task is reliant based on the Worker and/or Bank being configured to receive the specific Category of the Task (see Category references on the Task Type Detail, Position Detail and Bank Detail pages).

Guided Navigation drop list displays for many Automated Actions and will allow Users to enable or disable a **Guided Navigation** hyperlink for resulting Tasks. When this attribute is **Yes** for an Automated Action, the Task Type value for resulting tasks will display as a hyperlink that will navigate the main CalSAWS screen through a predefined sequence of online pages.

Page Location

- **Global**: Admin Tools
- **Local**: Admin
- **Task**: Task Admin > Automated Actions > Name hyperlink, Edit button

Task Settings

Key Considerations

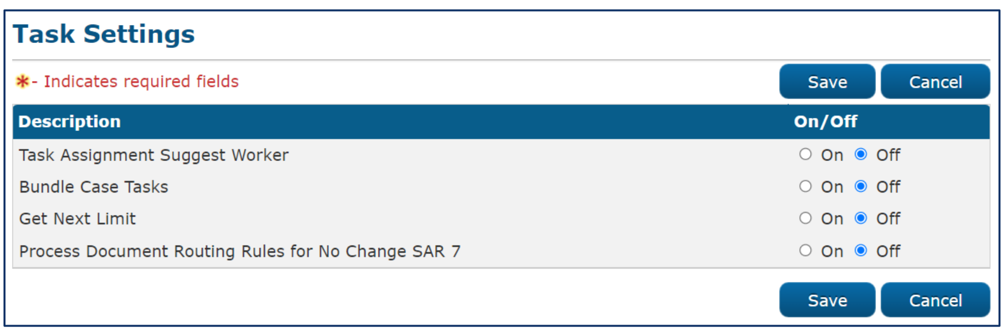
- Adjustable task settings, including the ability to retrieve suggested workers for task reassignment, bundling case tasks, and limiting Get Next tasks will be set to **Off** by default.
- **Bundle Case Tasks** functionality will be useful in leveraging **Get Next** for task reassignment, as described in more detail in the next section.

Overview

The **Task Settings** page will allow Users to turn on or off specific Task Management functions such as Suggest functionality, which will suggest workers to be assigned to a particular task, Bundle functionality, which will bundle Case Tasks during reassignment, and Get Next Limit functionality, which will limit the tasks that can be pulled by a worker using the **Get Next** button.

Task Settings Page

The **Task Settings** page displays Task Management settings to configure: **Task Assignment Suggest Worker**, **Bundle Case Tasks**, **Get Next Limit,** and **Process Document Routing Rules for No Change SAR 7.**


Task Settings

*- Indicates required fields

Save Cancel

Description	On/Off
Task Assignment Suggest Worker	On Off
Bundle Case Tasks	On Off
Get Next Limit	On Off
Process Document Routing Rules for No Change SAR 7	On Off

Save Cancel

Figure 11 – Task Settings Page

Task Assignment Suggest Worker

The **Task Reassignment Suggest Worker** setting will control the display of a **Suggest** button that will present suggested workers to be assigned to a particular task on the **Task Pop-Up Task Detail** and **Worklist Task Detail** pages. Opening the **Worker Suggestions** page using the **Suggest** button will display a list of suggested workers for the task in order or priority. The priority is determined by evaluating a hierarchy of the programs associated to entire case and retrieving the worker associated to the highest priority program see ***Appendix B – Program Hierarchy*** for a complete list of program priority). A specific worker can be selected and returned to the **Task Detail** page.

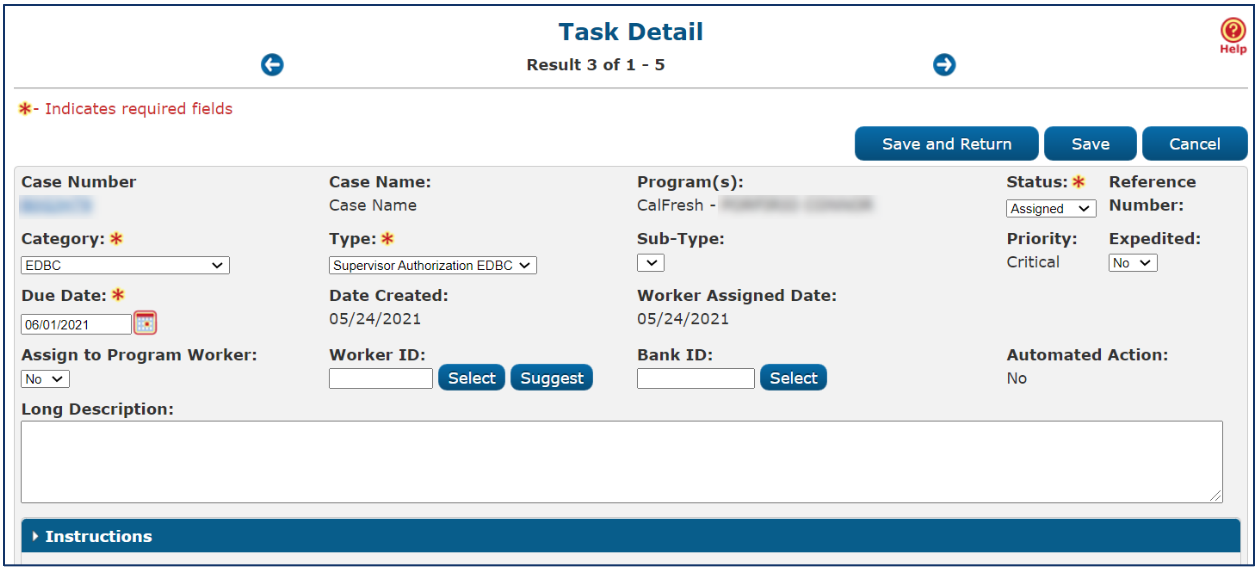


Figure 12 – Task Detail Page – Task Pop-Up

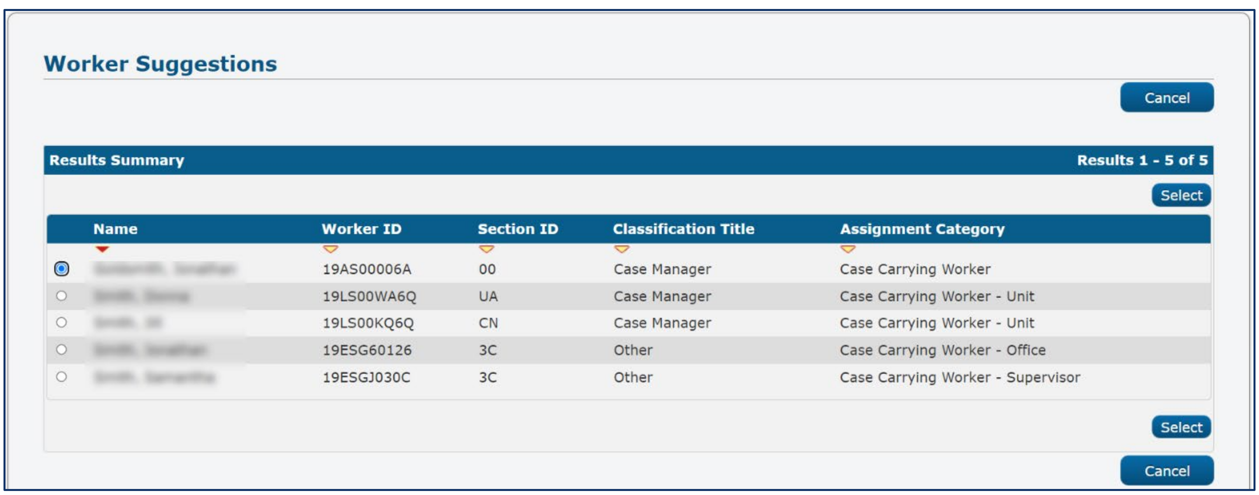


Figure 13 – Worker Suggestions

Bundle Case Tasks

The **Bundle Case Tasks** setting will control the display of a field that will indicate if a particular task reassignment action bundles case tasks or not on the **Task Pop-Up Task Search**, **Task Pop-Up My Tasks**, **Worklist**, and **Task Reassignment Detail** pages in CalSAWS. When a task is being reassigned using Bundle Case Tasks functionality, task bundling will evaluate the case that is associated to the task being reassigned and retrieve all tasks associated to the same case that are in a status of **Assigned**. Bundle processing will exclude tasks with a **Task Category** or **Program** that the receiving **Position** is not configured for. By default, this setting will be set to **Off** for all the counties.

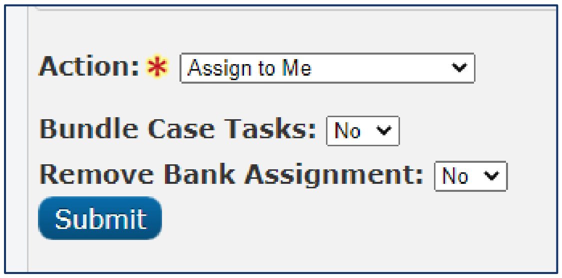


Figure 14 – Task Pop-Up Task Search Page – Bundle Case Tasks Field

Get Next Limit

The **Get Next Limit** setting will control a limit of tasks which can be pulled by a worker using the **Get Next** button. If this setting is set to **On**, a secondary line will display requesting the User to specify the limit. The dropdown will include the options of **Tasks** (default) and **Cases**. The text box will allow the User to specify a value between 1 and 999.

Process Document Routing Rules for No Change SAR 7

The **Process Document Routing Rules for No Change SAR 7** setting will control if the imaging of a SAR 7 will trigger a document routing rule if it was identified as having "No Change" when it was received. If this setting is **On** and the county has established a document routing rule for a SAR 7 form, then the system will continue to generate a task for SAR 7s received even if the form was flagged as "No Change".

Page Location

- **Global**: Admin Tools
- **Local**: Admin
- **Task**: Tasks > Tasks Settings

Get Next

Key Considerations

- **Get Next** allows a Worker to request a new **Task** to work.
- **Get Next** retrieves tasks from **Task Banks**.

- To use the **Get Next** function, workers must be associated to at least one **Task Bank** and their Position must be configured to receive the appropriate Task Categories.
- Users may opt to use **Get Next** with Bundle Case Tasks functionality.

Overview

The **Get Next** function, available on the **Worklist** and **Task Pop-Up My Tasks** pages, will search for Task Banks that the worker clicking the button is associated to. System processing will then prioritize a task to be served up and assigned to the User as follows:

Of tasks that are assigned to the Bank(s) the User is associated to, priority is determined by evaluating the task's associated **Task Type/Sub-Type** priority, **Due Date**, and **Creation Date**. Tasks with an existing Position assignment will not be reassigned by **Get Next**. The worker's Position information will be evaluated to confirm that the Position has been configured to receive the category of the Task being served up. Once a Task is assigned to the requesting Worker, the Status is set to "In Process".

Worklist Page

If the **Case Bundle Tasks** setting is turned **On** using the **Task Settings** page, the **Case Bundle Tasks** drop list will display in the **Get Next** section on the Worklist page. This drop list allows Users to opt into bundling case tasks while using the **Get Next** functionality. The attribute selected will be respected when using **Get Next** functionality. The attribute will default to **No** upon initial load of the page.

Figure 15 – Worklist Page – Get Next Section

Page Location

- **Global**: Case Info
- **Local**: Tasks
- **Task**: Worklist

Task Pop-Up My Tasks Page

Similar to above, if the **Case Bundle Tasks** setting is turned **On** using the Task Settings page, the **Case Bundle Tasks** drop list will display next to the **Get Next** button on the **Task Pop-Up My Tasks** page.

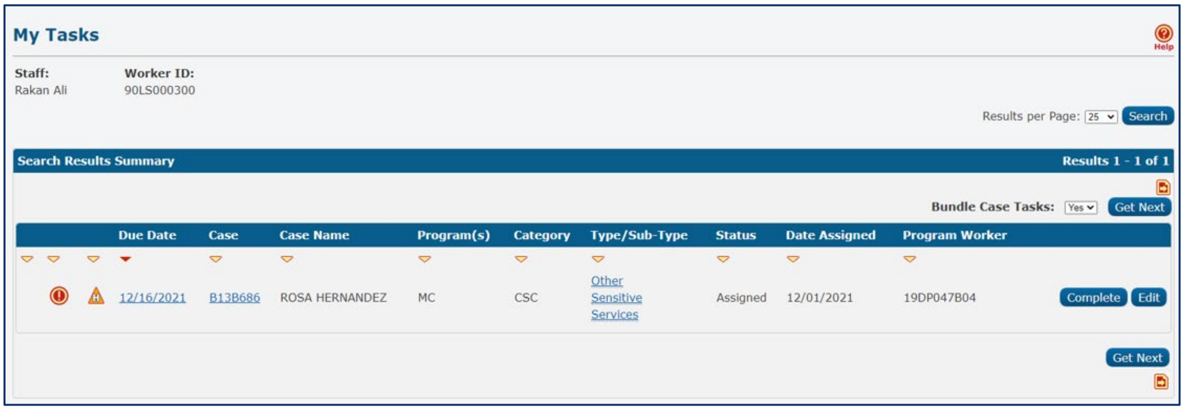


Figure 16 – Task Pop-Up - My Tasks Page - Get Next Button

Page Location

- **Utilities**: Tasks > My Tasks tab

Document Routing Rules

Key Considerations

- A list of available Document Types and Form Names available for automatic creation of tasks upon scanning can be referenced in ***Appendix C – Document Types and Form Names Inventory***.
- A document may only be associated to one **Active** Document Routing Rule within the County.
- Creation of Task Types is a prerequisite for configuring Document Routing Rules.
- Append functionality, while not required for the initial configuration of Task Types, enables the consolidation of tasks created by Document Routing Rules.

Overview

Document routing functionality exists to provide Users the ability to configure automated task creation based on the **Document Type** and **Form Number/Name** of images scanned. Users will be expected to create document routing rules upon Go Live. It is recommended that Counties determine the document routing rules during the County Preparation phase using the following general process:

1. Review ***Appendix C – Document Types and Form Names Inventory*** to identify which document types and/or forms will require automatic creation of tasks upon scanning.
2. Of the forms identified, determine which forms could be consolidated into single rules. This effort will help determine the number of Document Routing Rules and Task Types needed to generate tasks.

Suppose a county requires tasks to be created for 200 different forms. The county may configure/consolidate those forms in the following ways:

Example 1: Create one Document Routing Rule with a single Task Type (i.e. "Images Received") that has all 200 documents associated to it. This approach requires one Task Type and one Document Routing Rule to be created.

Example 2: Create 200 individual Document Routing Rules each with one of the 200 documents. This approach requires 200 Document Routing Rules to be created and between 1 and 200 individual Task Types to support the rules. Note: All 200 rules could use a single Task Type.

Example 3: Create any number of Document Routing Rules to support the 200 documents as required. For example, the county may create a "Customer Report" Document Routing Rule with a "Customer Report Received" Task Type that is associated to "Customer Report" type documents. The remaining documents that are not Customer Report documents can then be associated to a second Document Routing Rule.

The following pages enable the search and creation of Document Routing Rules in CalSAWS: **Document Routing Rule List**, **Document Routing Rule Detail**, **Select Form**, and **Document Routing Rule Program Detail** pages.

Document Routing Rule List Page

The **Document Routing Rule List** page displays document routing rules that are available in CalSAWS once created. Users can navigate to the detailed information for each document routing rule from this page.

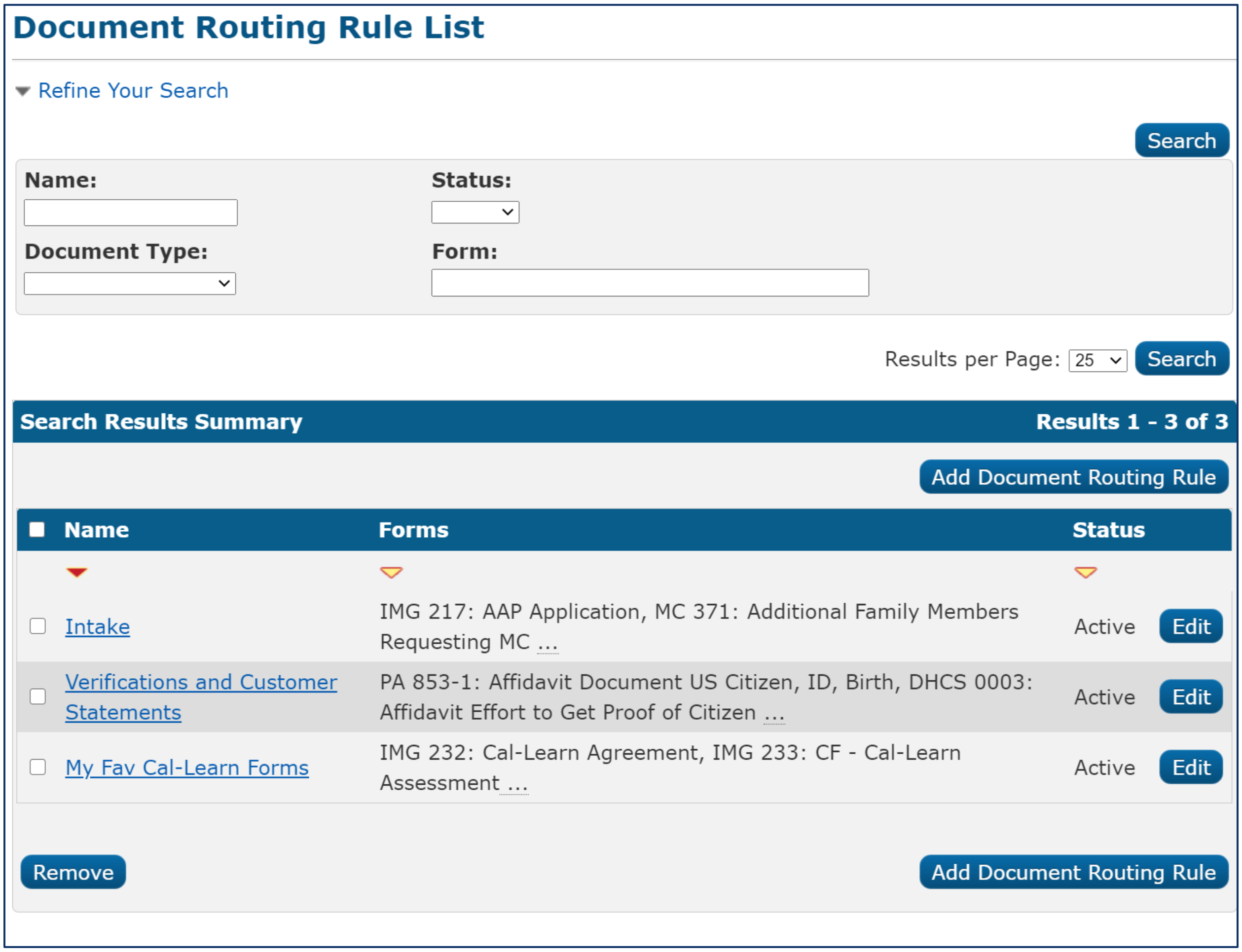


Figure 17 Document Routing Rule List Page

Refine Your Search Section

The **Refine Your Search** section is an expandable section that allows Users to refine a search by the **Document Routing Rule Name**, **Status**, **Document Type**, and **Form**.

Search Results Summary

The **Search Results Summary** section will paginate Task Types with 25 results per page. On initial load, the section will display all Document Routing Rules for the County alphabetically. The **Name**, **Forms**, and **Status** columns are all sortable for the results. To create a new document routing rule, click the **Add Document Routing Rule** button in this section. To edit details for an existing document routing rule, click the **Edit** button. These buttons, in addition to the **Name** hyperlink, will navigate to the **Document Routing Rule Detail** page.

Page Location

- **Global**: Admin Tools

- **Local**: Admin
- **Task**: Automated Actions > Document Routing

Document Routing Rule Detail Page

The **Document Routing Rule List** page is accessible from the **Document Routing Rule List** page. This page displays information about the document routing rule and allow Users to create new rules and edit existing rules.

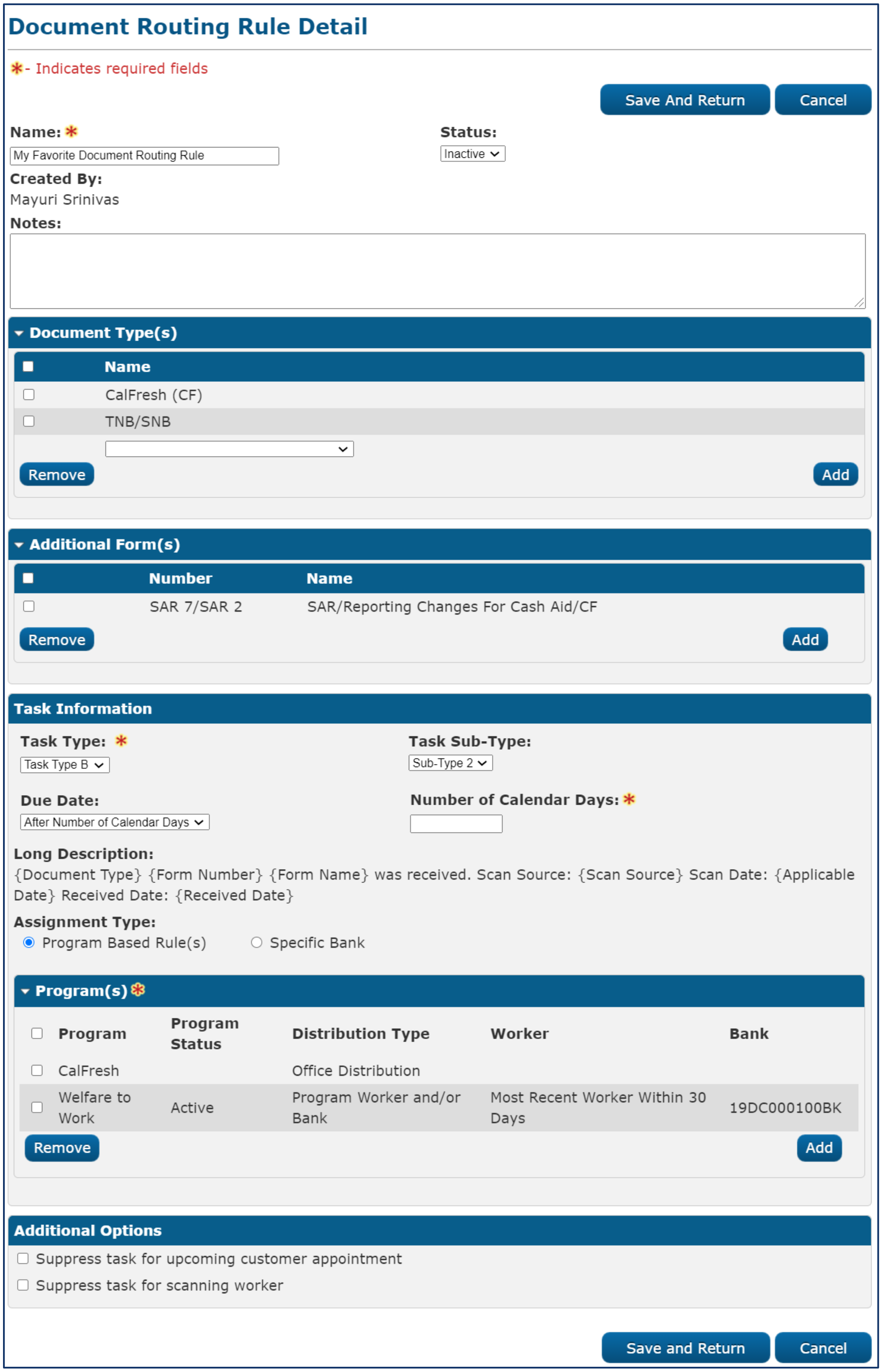


Figure 18 – Document Routing Rule Detail Page

General Information Section

The **General Information** section at the top of the pages displays the name and status of the document routing rule as well as any **Notes** associated to the rule. By default, the status will be set to **Active** when creating a new document routing rule. Clicking the **Save and Return** button to save changes to the document routing rule and return to the **Document Routing Rule List** page. To discard your changes, click the **Cancel** button.

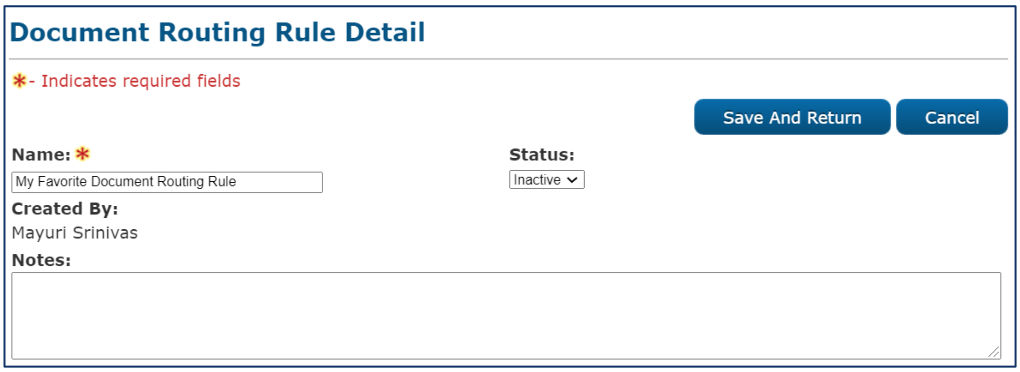


Figure 19 – Document Routing Rule Detail Page – General Information Section

Document Type(s) Section

The **Document Type(s)** section is an expandable section available on the **Document Routing Rule Detail** page that allows Users to select the document type(s) to assign to the rule. This section serves as a quick way to associate all documents for a given Document Type to a rule.

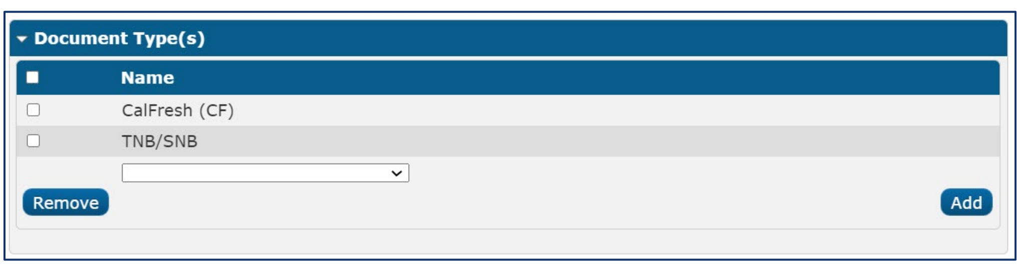


Figure 20 – Document Routing Rule Detail Page – Document Type(s) Section

Additional Form(s) Section

The **Additional Form(s)** section is an expandable section available on the **Document Routing Rule Detail** page that allows Users to select the form(s) to assign to the rule. This section can be used to create more granular rules based on specific forms identified. Clicking the Add button in this section will navigate User to the **Select Form** page.

Figure 21 – Document Routing Rule Detail Page – Additional Form(s) Section

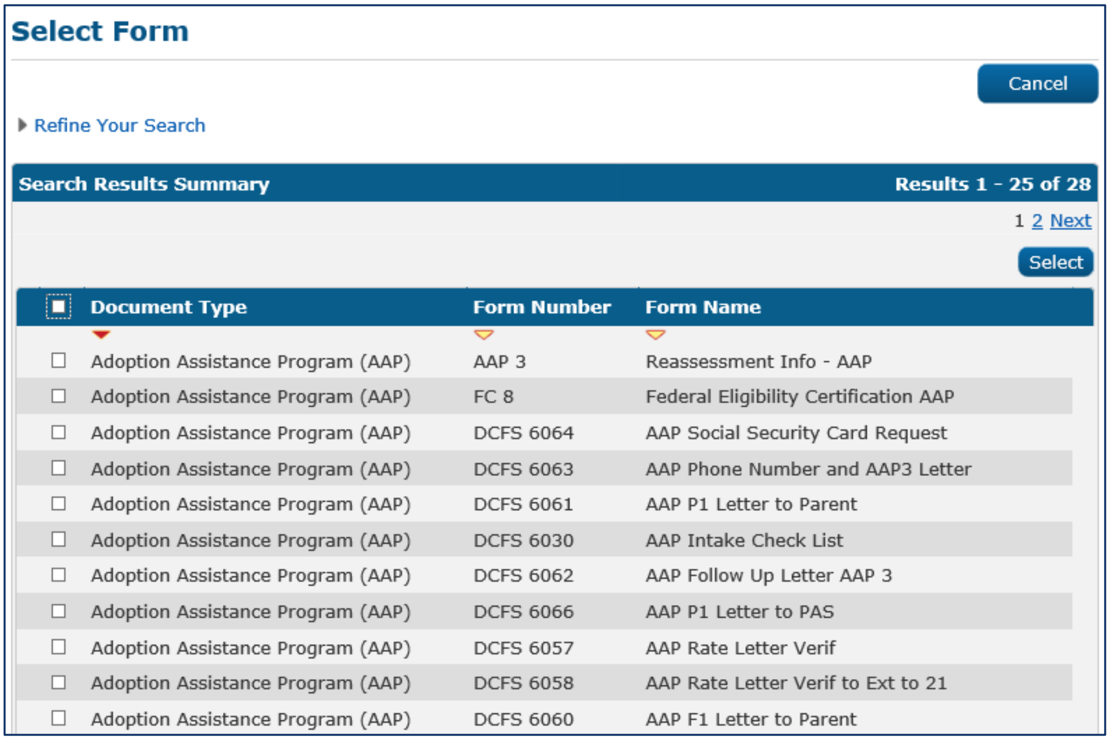


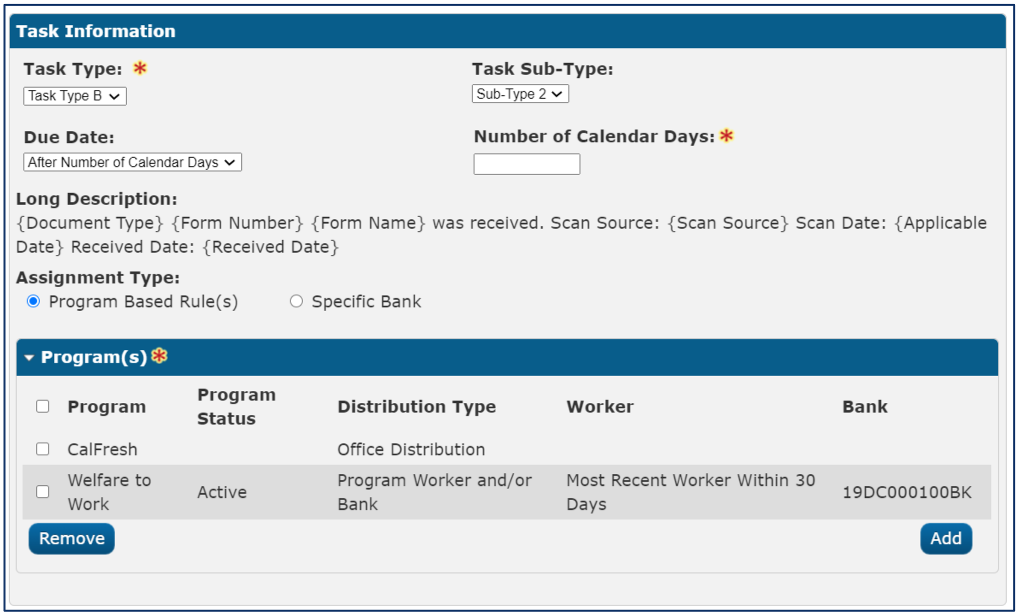
Figure 22 – Select Form Page – Search Results Summary

Task Information Section

The **Task Information** section available on the **Document Routing Rule Detail** page displays task attributes such as the **Task Type**, **Due Date**, and **Assignment Type**. To determine the assignment instructions for the document routing rule, use the radio buttons to select either **Program Based Rules** or **Specific Bank**. If **Program Based Rules** is selected, Users must click the **Add** button in the **Programs** panel to configure the program based assignment type. This button will navigate to the **Document Routing Rule Program Detail** page. If **Specific Bank** is selected, a **Bank ID** field will dynamically display to allow Users to select a specific Bank to assign resulting tasks to.

While using **Program Based Rules** for each Program to be applied to the rule, **Program Status** is an optional field. Leaving this field blank means that the rule is met if the Case contains the selected Program regardless of the Program Status. A specific Program Status will result in processing confirming that the Case includes the Program with the selected Program Status.

For example, a Program based rule of "CalFresh" with a blank Program Status will trigger if the Case simply includes a CalFresh Program.


Task Information

Task Type: * Task Type B

Task Sub-Type: Sub-Type 2

Due Date: After Number of Calendar Days

Number of Calendar Days: *

Long Description:
{Document Type} {Form Number} {Form Name} was received. Scan Source: {Scan Source} Scan Date: {Applicable Date} Received Date: {Received Date}

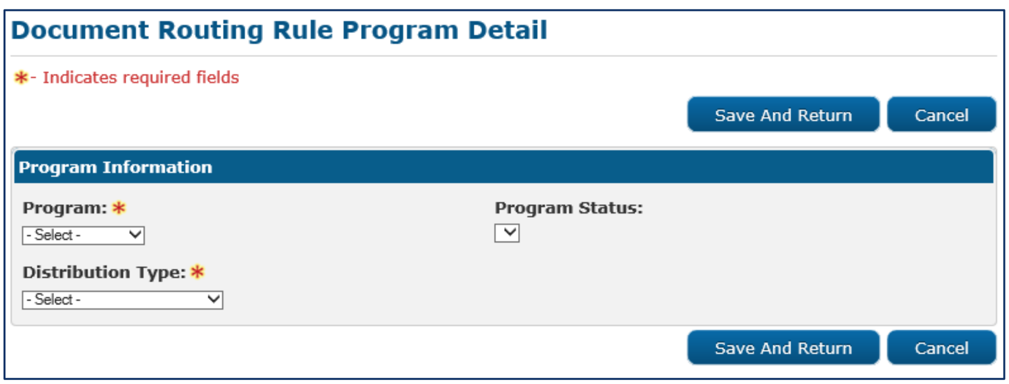
Assignment Type:
Program Based Rule(s) Specific Bank

Program(s) *

Program	Program Status	Distribution Type	Worker	Bank
CalFresh		Office Distribution		
Welfare to Work	Active	Program Worker and/or Bank	Most Recent Worker Within 30 Days	19DC000100BK

Remove Add

Figure 23 – Document Routing Rule Detail Page – Task Information Section


Document Routing Rule Program Detail

*- Indicates required fields

Save And Return Cancel

Program Information

Program: * - Select -

Program Status:

Distribution Type: * - Select -

Save And Return Cancel

Figure 24 - Document Routing Rule Program Detail Page – Program Information Section

Additional Options Section

The **Additional Options** section available on the **Document Routing Rule Detail** page displays two additional options to include as part of the document routing rule. Selecting the **Suppress task for upcoming customer appointment** checkbox will suppress a task from being created if the case has an appointment scheduled for the same day. Selecting the **Suppress task for scanning worker** checkbox will suppress a task from being created if the worker who would receive the task is the same worker who scanned the document. Note that if a document routing rule configuration results in multiple programs/workers based on a single scanned document, only workers that match the scanning worker will be suppressed from task creation. A task may still result if at least one program worker does not match the scanning worker.

Figure 25 – Document Routing Rule Detail Page – Additional Options Section

Page Location

- **Global**: Admin Tools
- **Local**: Admin
- **Task**: Automated Actions > Document Routing > Name hyperlink, Add Document Routing Rule button, Edit button

Task Reassignment Options

Key Considerations

- If a program is reassigned from Worker A to Worker B and that program includes Assigned/In-Process tasks that have the **Assign to Program Worker** attribute as seen on the **Task Pop-Up Task Detail** page set to **Yes**, the tasks will also be reassigned to Worker B.

Overview

The following pages enable the reassignment of one or more tasks in CalSAWS: **Task Reassignment**, **Pop-Up Task Search**, **Task Detail**, and **Worklist** pages.

Task Reassignment

On a nightly basis, batch processing will process reassignment instructions queued up for the current evening. Reassignment instructions can be viewed and configured using the **Task Reassignment Search** and **Task Reassignment Detail** pages.

Task Reassignment Search Page

The **Task Reassignment Search** page lists the Task Reassignment instructions that exist for the County. From this page, Users can search, view, edit, remove, and create new reassignment instructions.

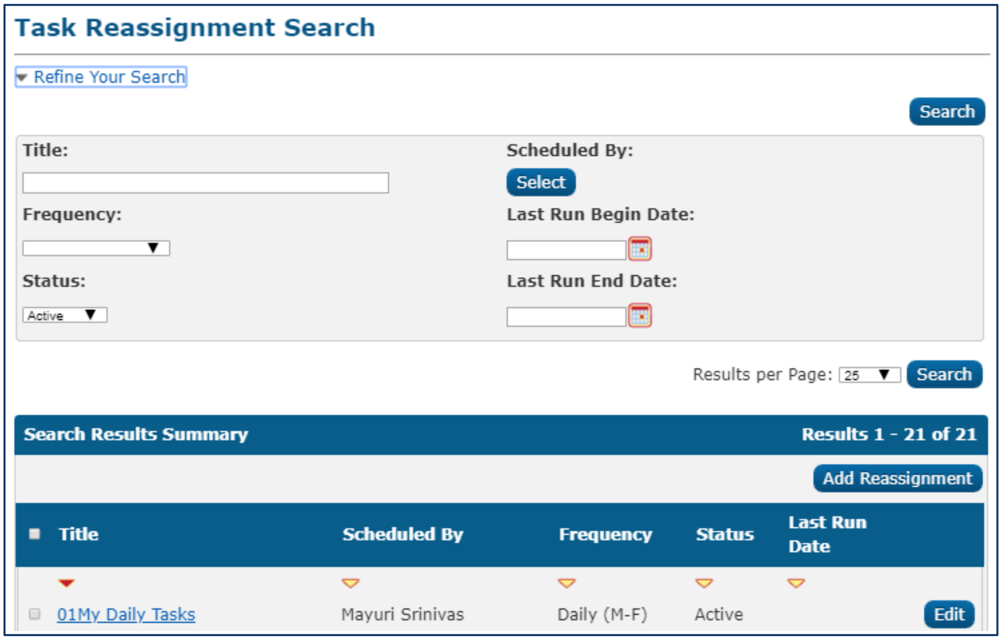


Figure 26 – Task Reassignment Search Page

Refine Your Search Section

The **Refine Your Search** section is an expandable section that allows Users to refine a Task Reassignment search by **Title**, **Frequency**, **Status**, **Scheduled By**, **Last Run Begin Date**, and **Last Run End Date**. The **Frequency** field indicates the frequency of the Task Reassignments. Options include **One-Time**, **Daily (M-F)**, **Weekly**, or **Every Other Week**. The **Status** field will include the options of **Active** or **Inactive**. Clicking the **Select** button under the **Scheduled By** field will direct Users to the **Select Staff** page to select the filter the search by the staff member that created the instruction(s). The **Last Run Begin Date** field sets a beginning range filter for the date the instruction was last executed. The **Last Run End Date** field sets an end range filter for the date the instruction was last execute

> **Note on Last Run End Date:** If a Task Reassignment has not been completed, the Last Run Date will be blank. These Task Reassignments will be included in the search results when the Last Run End Date filter is blank.

Search Results Summary

The Search Results Summary section displays information for the reassignment instructions that matches the User specified search criteria alphabetically by title. The **Title**, **Scheduled By**, **Frequency**, **Status**, and **Last Run Date** columns are all sortable for the results. To create a new reassignment instruction, click the **Add Reassignment** button in this section. To edit details for an existing reassignment instruction, click the **Edit** button. These buttons, in addition to the **Name** hyperlink, will navigate to the **Task Reassignment Detail** page.

Page Location

- **Global**: Admin Tools
- **Local**: Admin
- **Task**: Tasks > Task Reassignment

Task Reassignment Detail Page

The **Task Reassignment Detail** page allows Users to manage detail information for task reassignment instructions. The Task Reassignment Detail page includes information from the **Task Reassignment Search** page in addition to **Task Source(s)**, **Reassignment Options**, **Task Destination(s)**, **Recurrence**, and **Reassignment Results** if available.

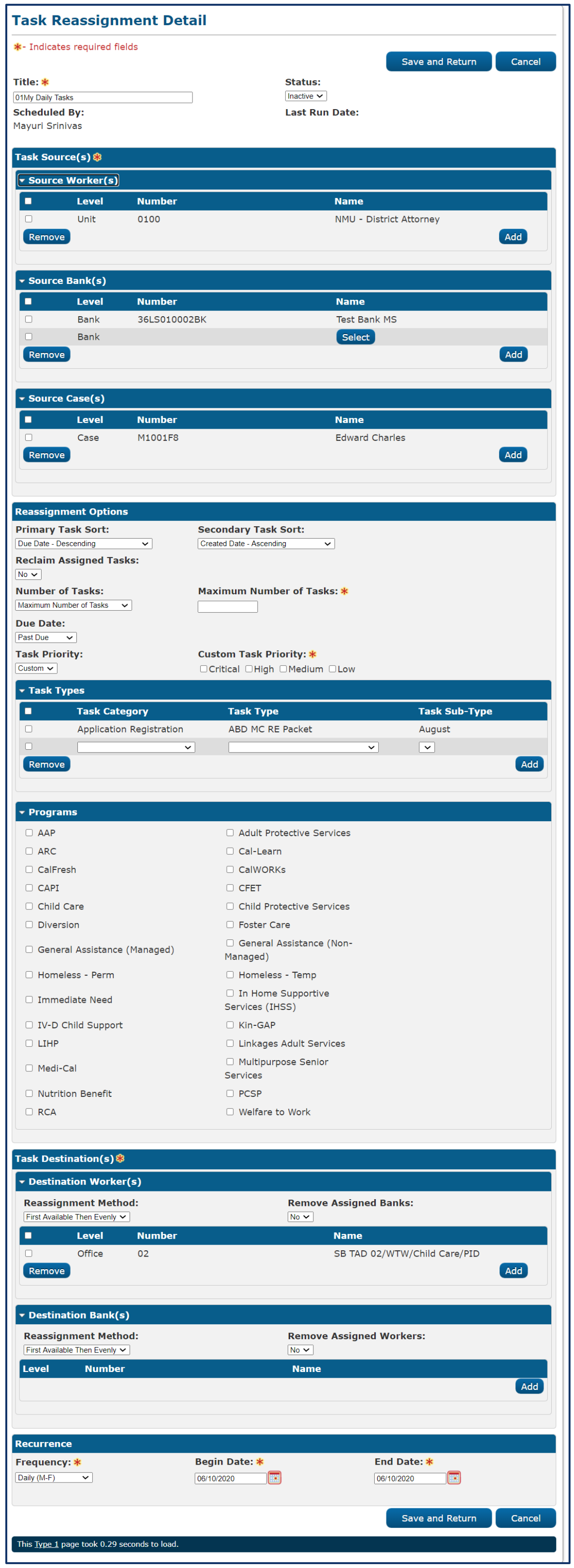


Figure 27 – Task Reassignment Detail Page

General Information Section

The **General Information** section at the top of the pages displays the name and status of the reassignment instruction as well as the name of the worker scheduling the instruction. By default, the status will be set to **Active** when creating a new reassignment instruction. Clicking the **Save and Return** button to save changes to the reassignment instruction and return to the **Task Reassignment Search** page. To discard your changes, click the **Cancel** button.

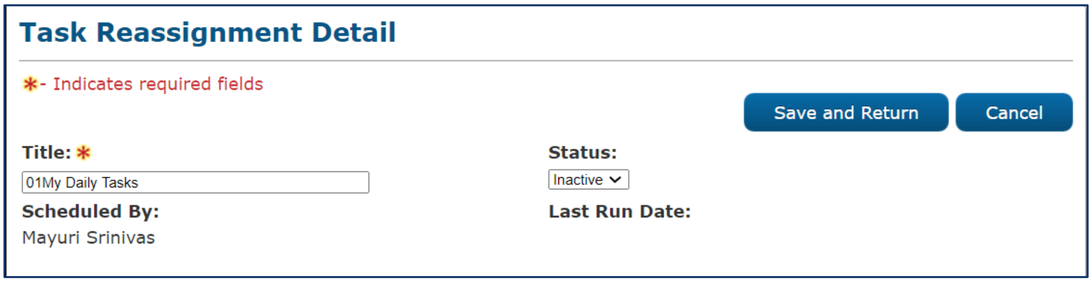


Figure 28 – Task Reassignment Detail Page – General Information Section

Task Source(s) Section

The **Task Source(s)** section is a required section available on the **Task Reassignment Detail** page that allows Users to select the task sources(s) to assign to the reassignment instruction. This section serves to associate source workers, banks, and/or cases for a given instruction. A new source is added by clicking the **Add** button under the applicable section. The Level column displays the level of the organization selected for a given row. Under the **Source Worker(s)** section, possible Level values are **Worker**, **Unit**, or **Office**. Possible Level values under the **Source Banks(s) and Source Case(s)** are **Bank** and **Case**, respectively. The **Number** column displays the number or code associated to the selected organization, worker, bank, or case. The **Name** columns displays the associated name.

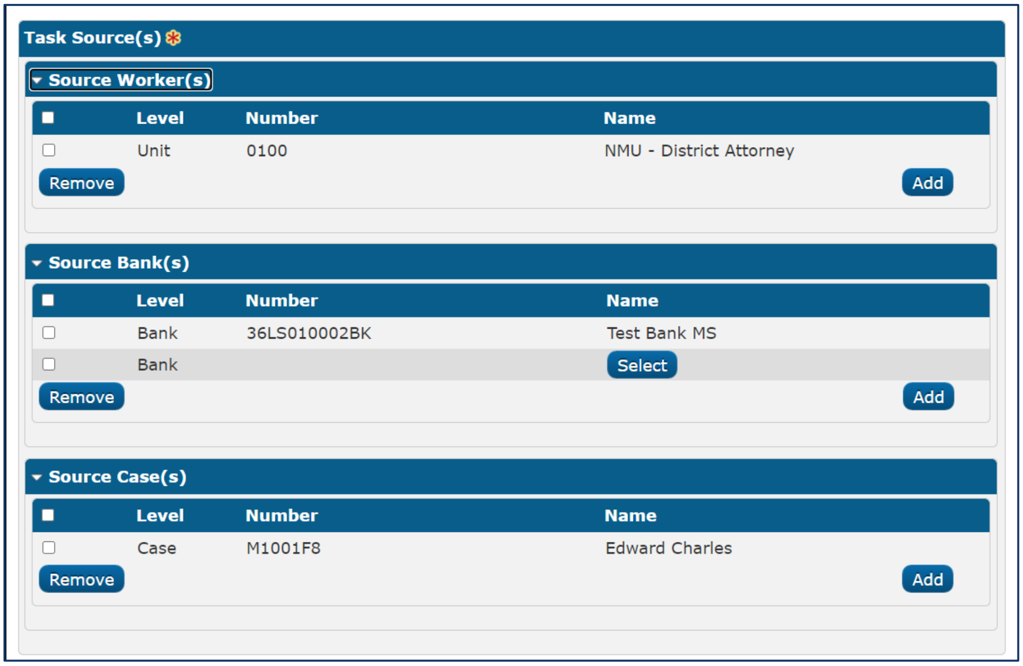


Figure 29 – Task Reassignment Detail Page – Task Source(s) Section

Reassignment Options Section

The **Reassignment Options** section is a section available on the **Task Reassignment Detail** page that allows Users to select how tasks will be reassigned. The **Primary Task Sort** drop list determined the order of tasks to be reassigned. The default option is by oldest due date first. The User can change this value to one of the following options. Note that Ascending means the oldest date will be listed last:

- Due Date – Ascending
- Due Date – Descending
- Created Date – Ascending
- Created Date – Descending
- Worker Assigned Date – Ascending
- Worker Assigned Date – Descending
- Task Priority – Low to Critical
- Task Priority – Critical to Low

The **Secondary Task Sort** drop list determined the order of tasks to be reassigned if the **Primary Task Sort** results in a tie. The default option is by oldest created date first. The User can change this value to one of the options above.

The **Reclaim Assigned Tasks** drop list allows the User to indicate that the task reassignments should be reclaimed, or undone, for any Tasks that remain assigned at the next occurrence of the reassignment instructions. This action would occur before the next scheduled task assignment is completed. Options include **Yes** and **No**.

The **Number of Tasks** drop list allows the User to restrict the total number of tasks that are reassigned. By default, this field will allow reassignment of all the Tasks assigned to the Workers and organizations identified in the Task Source(s) Panel. The User can select one of the following options:

- All Assigned Tasks
- Maximum Number of Tasks
- Number of Tasks per Worker
- Percentage of Assigned Tasks

The **Due Date** drop list allows the User to restrict the total number of tasks that are reassigned. By default, this field will allow reassignment of all the tasks assigned to the Workers and organizations identified in the Task Source(s) section. The User can select one of the following options:

- Any
- Past Due
- Next 7 Days
- Next 30 Days
- Custom

The **Task Priority** drop list allows the User to select the priority of the task reassignment. Options include **Any** and **Custom**. When **Custom** is selected, a required **Custom Task Priority** section displays with the possible priority values of **Critical**, **High**, **Medium**, and **Low**.

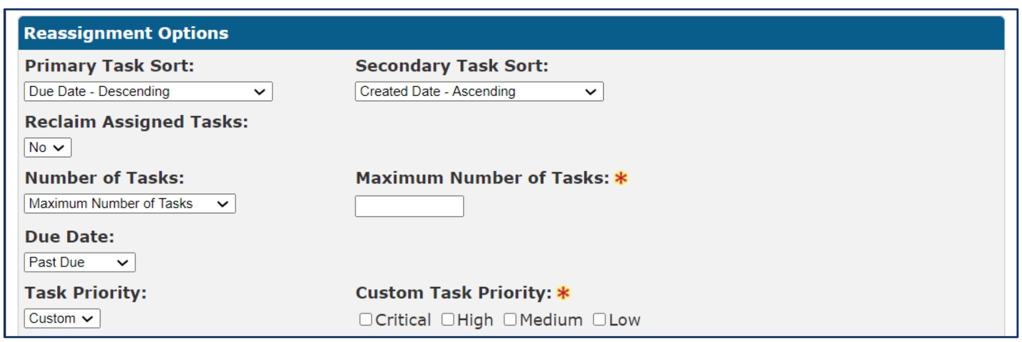


Figure 30 – Task Reassignment Detail Page – Reassignment Options Section

Task Types Section

The **Task Types** section is an expandable section available on the **Task Reassignment Detail** page that allows Users to specify which tasks will be included in the task reassignment process. By default, this section loads in collapsed view with no rows specified. This means that tasks of any type and sub-type will be included in the reassignment process. When expanded, the User can select a **Category**, **Task Type**, and **Task Sub-Type**. Selection of **Task Category** is not required. However, if the user selects a Task Category, the Task Type dropdown will only display Task Types available within the selected Task Category. Similarly, if the user does not select a Task Category value, and they do select a Task Type value, the Task Category value will remain blank. The Task Category dropdown will include all available Task Categories. Selection of **Task Type** is also not required, as a user may choose to reassign tasks based on a Task Category alone.

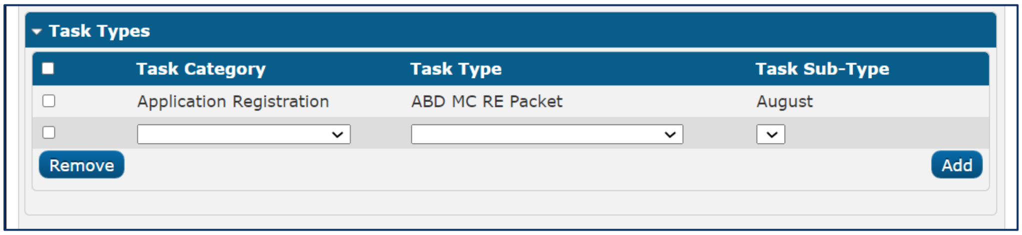


Figure 31 – Task Reassignment Detail Page – Task Types Section

Programs Section

The **Programs** section is an expandable section available on the **Task Reassignment Detail** page that allows Users to specify which programs will be included in the task reassignment process. The User may expand this section to identify a program, or set of programs, from which to draw tasks. Programs that are considered intake programs or external programs will be displayed. If no program is selected, tasks associated to any program will be included in the task reassignment process.

Figure 32 – Task Reassignment Detail Page – Programs Section

Task Destination(s) Section

The **Task Destination(s)** section is a required section available on the **Task Reassignment Detail** page that allows Users to choose how the tasks are reassigned to worker and bank destinations. The options for worker **Reassignment Method** include **Evenly Among Workers** and **First Available Then Evenly**. The **Remove Assigned Banks** drop list allows the User to choose whether to remove any existing Bank Assignments when reassigning tasks to workers and include options of **Yes** and **No** (default). The options for bank **Reassignment Method** include **Evenly Among Workers** and **First Available Then Evenly**. The **Add** button in each sub-section inserts a new row in the table to specify the task destination.

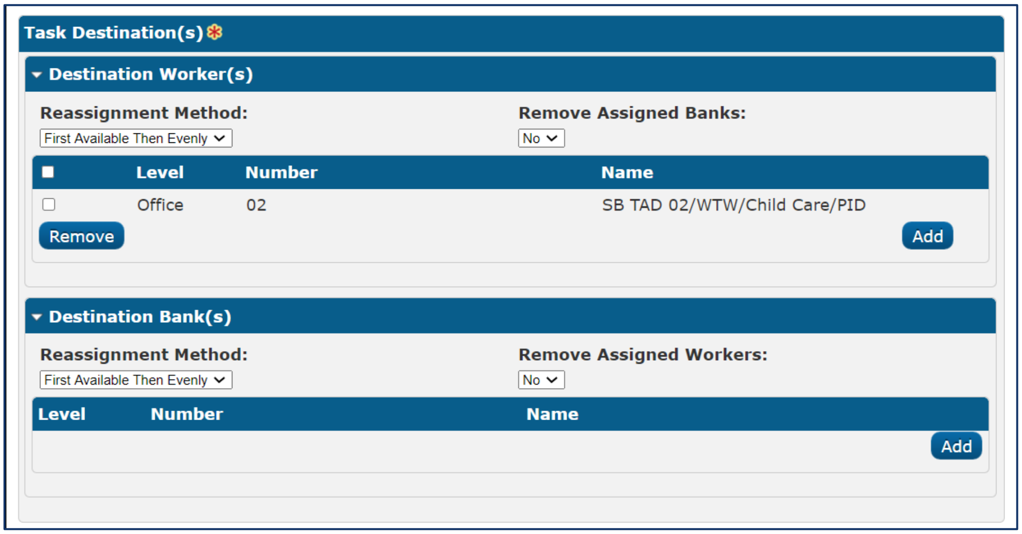


Figure 33 – Task Reassignment Detail Page – Task Destination(s) Section

Recurrence

The **Recurrence** section is available on the **Task Reassignment Detail** page to allow Users to specify recurrence of the task reassignment process. The four options available for frequency of reassignment include:

- One-Time (Default)
- Daily (M-F)
- Weekly
- Every Other Week

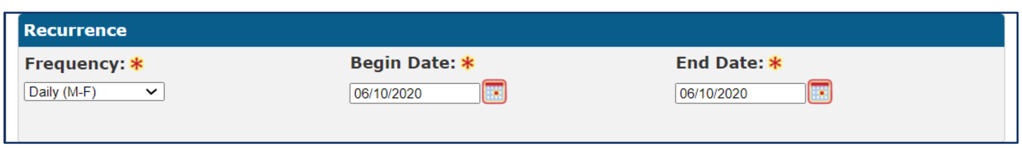


Figure 34 – Task Reassignment Detail Page – Recurrence Section

Page Location

- **Global**: Admin Tools
- **Local**: Admin

- **Task**: Tasks > Task Reassignment > Name hyperlink, Add Reassignment button, Edit button

Task Pop-Up: Task Search Page

Users can reassign one or more tasks using the **Search Results Summary** section on the **Task Pop-Up Task Search** page. Options for reassignment include **Assign to Me, Assign to Program Worker, Assign to Position, Assign to Eligible Positions, Assign to Bank, Unassign Position,** and **Unassign Bank.**

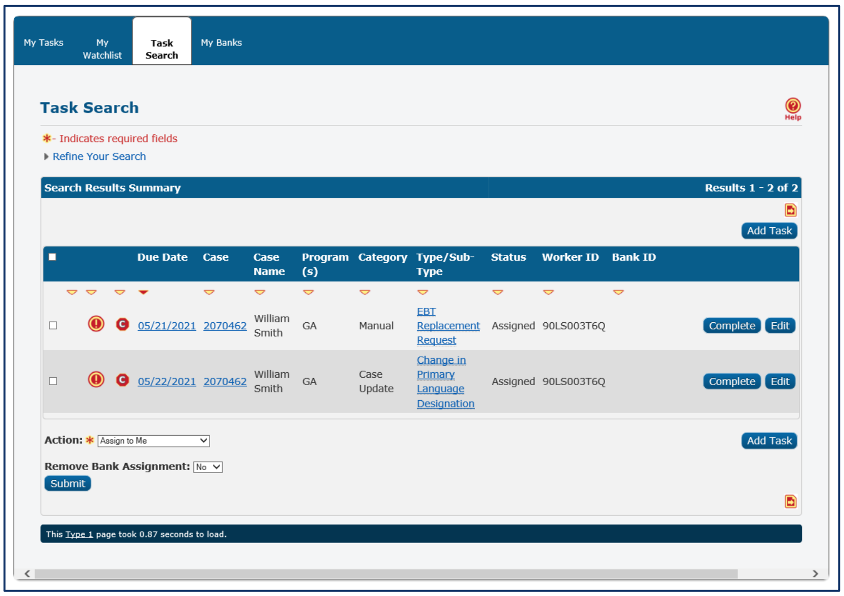


Figure 35 – Task Pop-Up Task Search Page

Page Location

- **Utilities**: Tasks > Task Search tab

Task Detail Page

A task can be reassigned individually on the **Task Detail** page using the **Worker Assigned** field. Clicking the **Select** button will navigate to the **Select Worker** page where the user can search for the worker to reassign the task to.

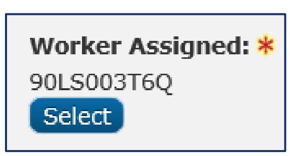


Figure 36 – Task Detail Page - Worker Assigned Field

Page Location

- **Utilities**: Tasks > Task Search tab

Worklist Page

One or more tasks can be reassigned on the **Worklist** page using the **Assign** and **Assign to** fields in the Search **Results Summary** section. The **Assign** drop list will provide options to assign the selected tasks to a Position or to the logged in worker. Clicking the **Select** button will navigate to the **Select Worker** page where the user can search for the worker to reassign the task to.

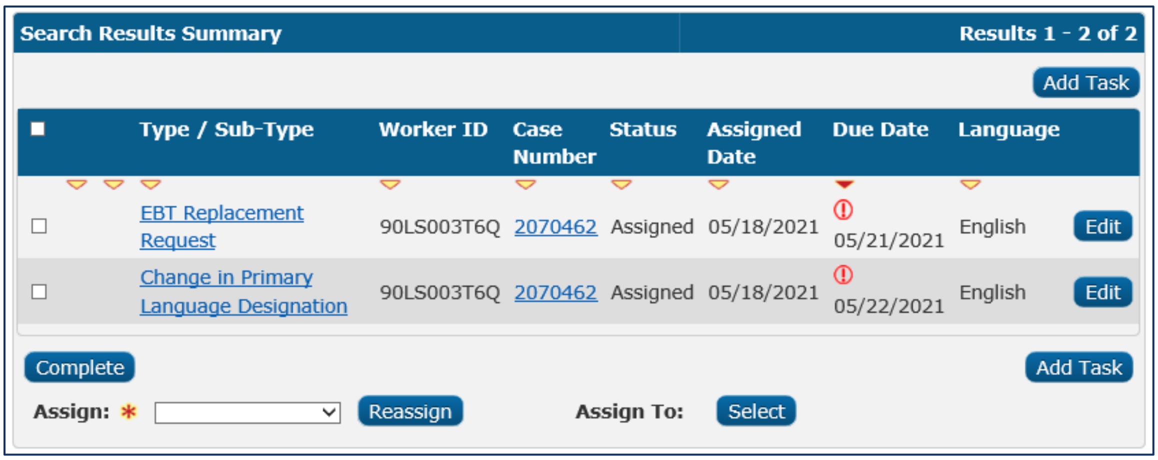


Figure 37 – Worklist Page - Assign and Assign To Fields

Page Location

- **Global**: Case Info
- **Local**: Tasks
- **Task**: Worklist

Task Management Support Materials

Web-Based Trainings (WBTs)

Web-based Trainings (WBTs) are self-guided eLearning modules that can be taken at a User's own time and own pace. The following Task Management WBTs are developed using Adobe Captivate and are hosted in the CalSAWS Learning Management System (LMS). The list of WBTs below is to identify specific topics covered in the functional WBT modules.

CURRICULUM: 034 – TASK MANAGEMENT			
WBT Title	**WBT Lessons**	**Description**	**WBT Duration**
Task Management Overview	L 01: CalSAWS Task Access Overview L 02: Utilizing Worklist Pages L 03: Task Images Buttons	This WBT provides an overview of the changes to Task Management functionality in CalSAWS. This WBT walks users through alternative methods to access tasks and explains how to utilize the Worklist, Worklist PR/RE and Worklist Summary pages to manage tasks. This WBT also demonstrates access to images associated with tasks through the various Task pages.	30 min
Task Management for Administrators	L 01: Document Routing Rules L 02: Appending Tasks L 03: Error Prone and High-Risk Tasks	This WBT provides an overview of Task Management functionality available to administrative users in CalSAWS. This WBT details how to specify append information for Task Types and Sub-Types, utilize the Error Prone and High-Risk tasks to configure batch processes, and establish document routing rules using the Document Routing Rule pages and sub-pages.	45 min

Quick Guides

The CalSAWS Quick Guide is a document which may include functional instructions, as well as screenshots from the CalSAWS system. It may highlight new functional processes, pages, page sections, fields, drop list values, etc. The following Quick Guides are hosted in LMS.

CURRICULUM: 034 – TASK MANAGEMENT		
Quick Guide	**Description**	**Recommended Audience**
Task Management – Appending Tasks	The purpose of this Quick Guide is to provide functional instructions on adding and/or editing appended Task Types and Sub-Types using the Append Information panel found on Task Type Detail and Task Sub-Type Detail pages.	Staff with Administrator Security rights
Task Management – Documenting Routing Rules	The purpose of this Quick Guide is to provide functional instructions on navigating to, viewing, creating, and	Staff with Administrator Security rights

	editing document routing rules using the Document Routing Rule List and corresponding pages.	
Task Management – Error Prone and High-Risk Tasks	The purpose of this Quick Guide is to provide functional instructions on configuring the Error Prone and High-Risk Administration page for batch processing of Error Prone and High-Risk Case scenarios.	Staff with Administrator Security rights
Task Management – Task Images Buttons	The purpose of this Quick Guide is to provide functional instructions on accessing images from the Worklist and Worklist PR/RE pages in addition to the Task pop-up window.	Eligibility Staff/Supervisors

CalSAWS Functional Presentations (CFPs)

The CalSAWS Functional Presentations (CFPs) are short videos designed to provide Users with a high-level overview of new system functionality in a Major Release. The following Task Management CFPs are developed using Adobe Captivate and are hosted in the CalSAWS Learning Management System (LMS).

CURRICULUM: 030 – CALSAWS FUNCTIONAL PRESENTATIONS (CFPS)		
CFP Title	**Description**	**CFP Duration**
TR20.11 SCR CA-214928: Unified Task Management	The purpose of this CFP is to provide functional instructions on configuring Task Types, Automated Action, Task Banks, and Task Reassignment instructions.	45 min
TR20.11 SCR CA-214929: Task Management	The purpose of this CFP is to provide functional instructions on utilizing the Task Pop-Up My Tasks, Task Search, and My Banks pages.	15 min
TR21.05 SCR CA-214913: Task Management - Append	The purpose of this CFP is to provide functional instructions on utilizing the Append functionality available on the Task Type and Task Sub-Type Detail pages.	10 min
TR21.05 SCR CA-214917: Task Management - Document Routing Rules	The purpose of this CFP is to provide functional instructions on utilizing the Document Routing Rule List, Document Routing Rule Detail, Select Form, and Document Routing Rule Program Detail pages.	15 min

Appendix

CalSAWS

Configuration Guide

Chapter Two: Additional Configurations

CalSAWS | Additional Configurations Guide.

General Overview

This Guide will serve as a resource, for CalSAWS users, to assist in establishing configuration settings that are vital to the overall functionality of CalSAWS. Some settings will be a one-time effort, while others will require continual updates.

Schedule Configuration

Overview

Schedules for Offices and Workers are configured by the County. Dependent on Security Profile, Users will be able to view, add and/or edit Worker Schedules. Office schedules are defined when creating an Office, which is covered in the Core Configuration Guide. Worker Schedules will be used to identify availability for appointments and can be used by Counties to track unavailable time as well.

Office Schedule

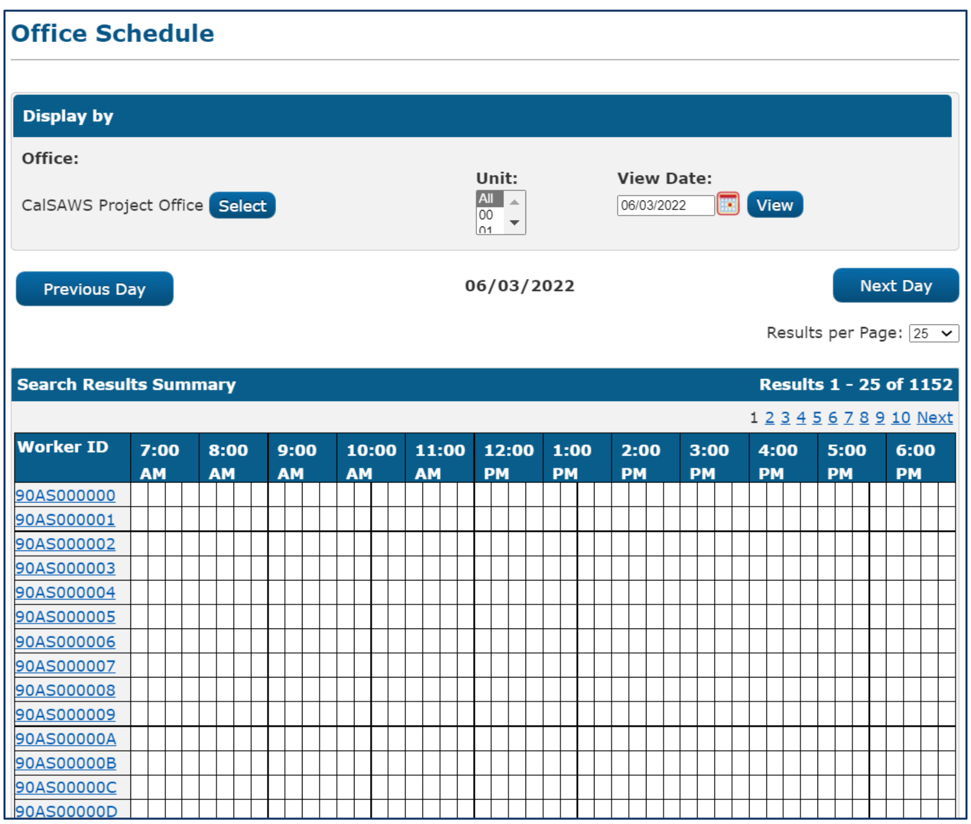


Figure 1 – Office Schedule Page

The **Office Schedule** page is a view only page that allows Users to view the schedule of all Workers within an entire Office or a specific Unit for a one-day period. By utilizing the **Previous Day** button and the **Next Day** button, the User can view schedules for previous or future days. The information found on the Office Schedule page is configured on the Maintain Worker Schedule page.

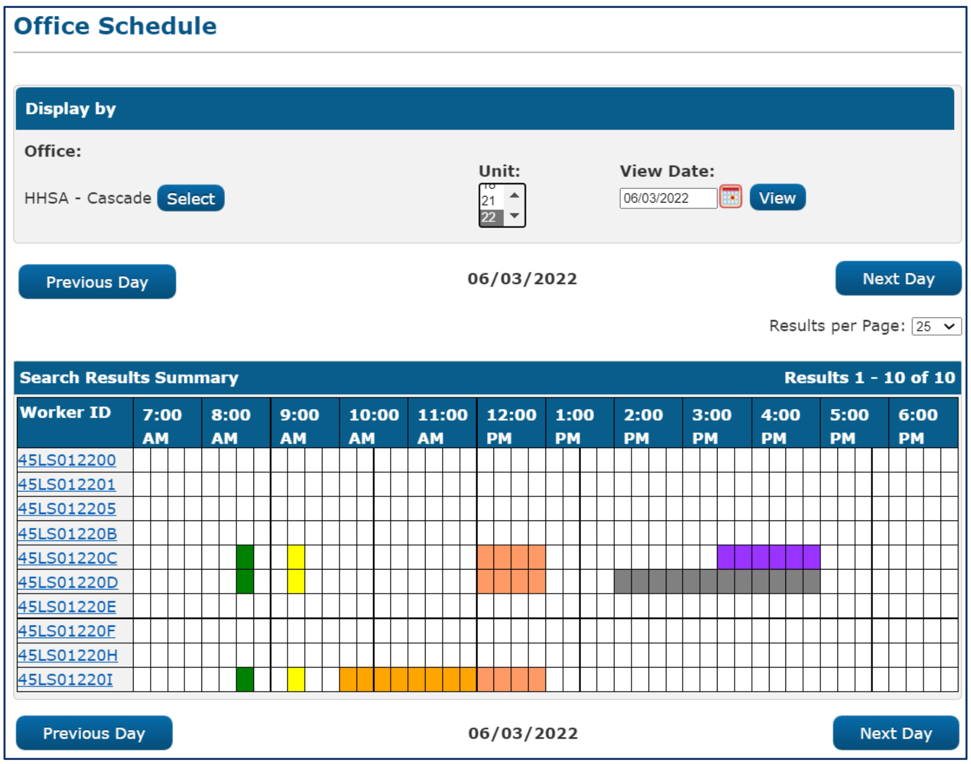


Figure 2 – Office Schedule Page – Updated

Once entries are made on the **Maintain Worker Schedule** page, the **Office Schedule** page will reflect the configured availability for each Worker.

Maintain Worker Schedule

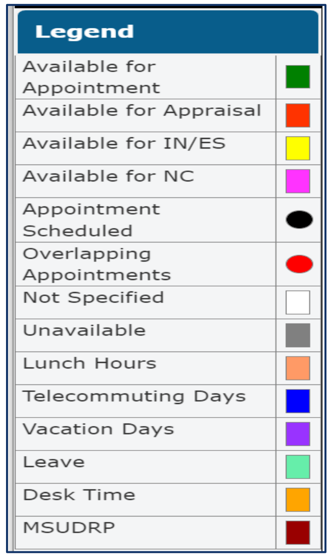


Figure 3 – Maintain Worker Schedule – Legend

The **Maintain Worker Schedule** page provides a Legend for schedule options. Apart from the following options, **Appointment Scheduled**, **Overlapping Appointment** and **Not Specified**, you will be able to select the listed options from the Category field in the **Establish Schedule** section.

The **Appointment Scheduled** and **Overlapping Appointments** indicator will populate through the Customer Schedule page.

The **Not Specified** indicator will populate any area of the Worker Schedule which is not otherwise designated.

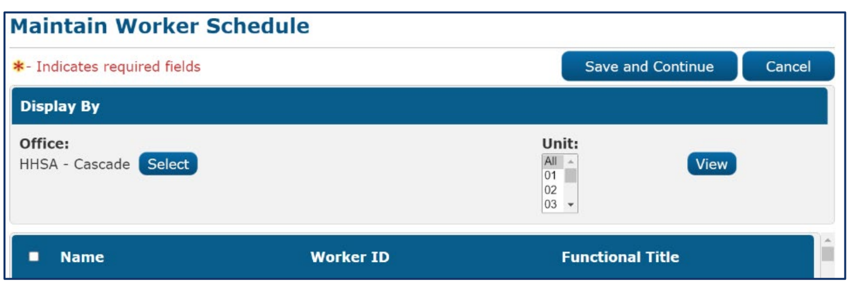


Figure 4 – Maintain Worker Schedule Page

On the **Maintain Worker Schedule** page:

1. Select **Office**. Use the Search/Select functionality.

   Note: Once you select an **Office**, the page will populate with all Workers known to the selected Office. To narrow your results, utilize the Unit and View Date fields.

2. Select **Unit.** This field contains all Units available in the selected Office.

3. Enter **View Date**.
4. Click the **View** button.

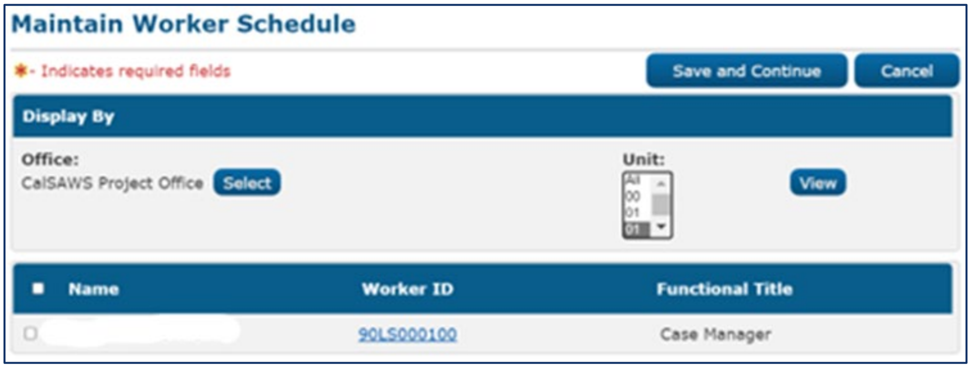


Figure 5 – Maintain Worker Schedule Page – Name, Worker ID, Functional Title Section

On the **Maintain Worker Schedule** page, **Name, Worker ID, Functional Title** section, the Name, Worker ID and Functional Title of all Workers in the selected Office or Unit will be displayed. To update the schedule for a Worker or Workers:

1. Select **Name**. You can select any number of Names by clicking in the check box located before the Name entry.

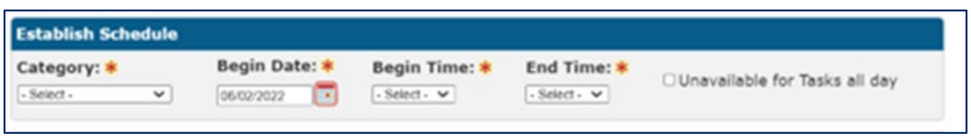


Figure 6 – Maintain Worker Schedule Page – Establish Schedule Section

On the **Maintain Worker Schedule** page, **Establish Schedule** Section:

1. Select **Category**.
2. Enter **Begin Date**.
3. Select **Begin Time**.
4. Click **Unavailable for Tasks All Day** if the Worker(s) selected will not accept tasks for the designated dates.

Figure 7 – Maintain Worker Schedule Page – Repeat Information Section

On the **Maintain Worker Schedule** page, **Repeat Information** section:

1. Select the **Do not repeat** radio button if you do not want the Established Schedule to repeat.

Or

1. Select the **Repeat** radio button.
2. From the drop down Select **Every**, **Every Other**, **Every Third** or **Every Fourth** week.
3. Click the check box(s) for the **Days of the Week** the schedule should repeat.

OR

1. Select the **Repeat** radio button.
2. From the drop down Select **First**, **Second**, **Third**, **Fourth** or **Last**.
3. From the drop down Select the **Day of the Week** to repeat on the first, second, third, fourth or last day of the month.
4. Click the **Save and Continue** button.

Page Location

Global: Admin Tools
Local: Office Schedule
Task: Office Schedule and Maintain Worker Schedule

Correspondence Configuration

Overview

Correspondence information is configurable by the County. The Correspondence Detail page captures the County Contact Number as well as address information for entities such as legal aid, hearings, and collections. When a legal, hearings, or collections address changes, it is recommended that you add a new address. Adding the new address maintains a history for the addresses. When you add a new address with the same type, and enter a begin date, the previous address will be end dated. Editing an address replaces the current address information and does not maintain a history for the address.

When an address is updated with the current date or a prior begin date, the address will be reflected on correspondence immediately. Correspondence address changes can take effect midday.

Correspondence List

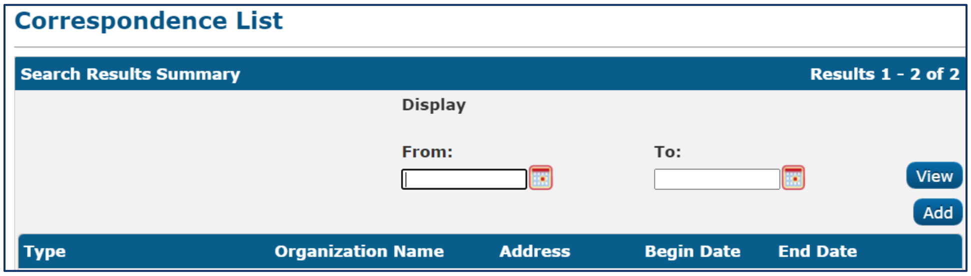


Figure 8 – Correspondence List Page

On the **Correspondence List** page:

1. Click the **Add** button.

Correspondence Detail

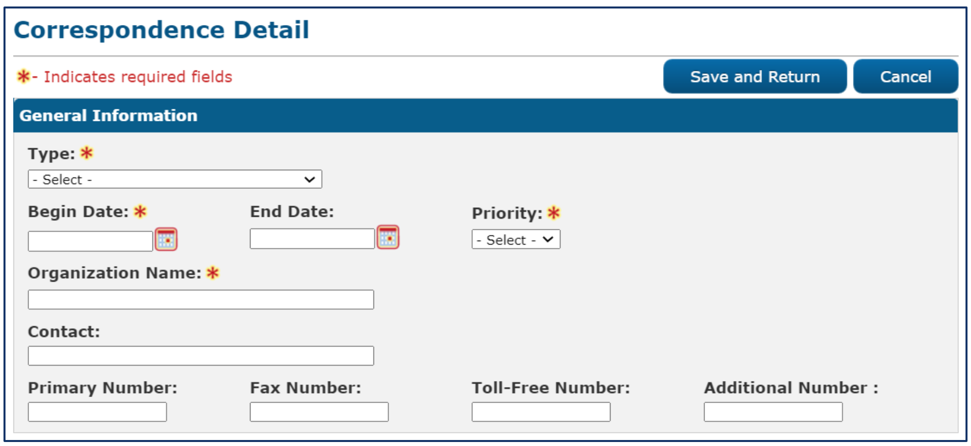


Figure 9 – Correspondence Detail Page – General Information Section

On the **Correspondence Detail** page, **General Information** section:

1. Select **Type**.
2. Enter **Begin Date**.
3. Select **Priority**.
4. Enter **Organization Name**.

The following fields are not required; however, they should be completed if applicable:

5. Enter **Contact**.
6. Enter **Primary Number**.
7. Enter **Fax Number**.
8. Enter **Toll-Free Number**.
9. Enter **Additional Number**.

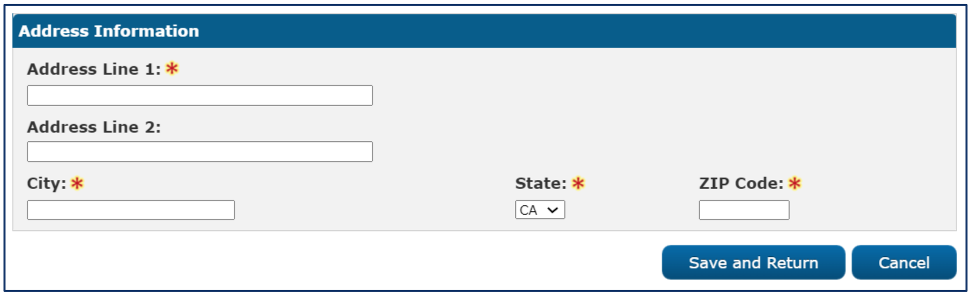


Figure 10 – Correspondence Detail Page – Address Information Section

On the **Correspondence Detail** page, **Address Information** section:

1. Enter **Address Line 1** and **Address Line 2** (if applicable).
2. Enter **City**.
3. Enter **State**.
4. Enter **Zip Code**.
5. Click the **Save and Return** button.

Page Location

Global: Admin Tools
Local: Admin
Task: Correspondence

County Authorizations Configuration

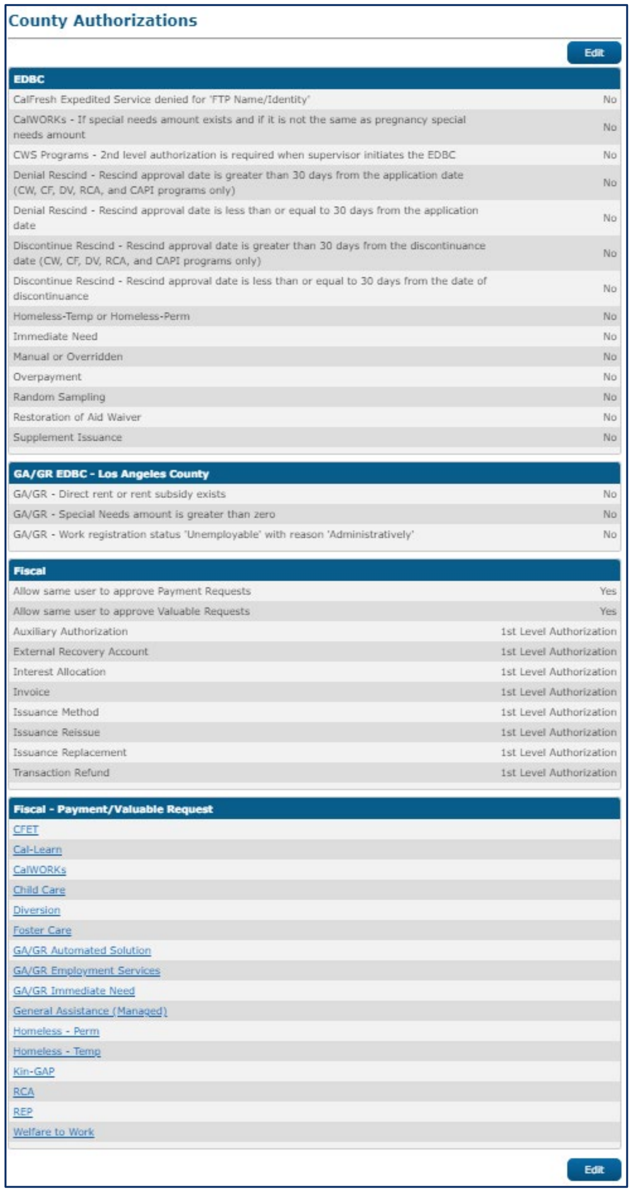
Overview

County Authorization Configuration allows each County to configure the level(s) of authorizations as appropriate. Authorizations allow the County to indicate if the Worker can authorize certain actions, or if a higher level of authorization is required. For each configurable County Authorization, the County may indicate which of the following is necessary:

- **No** (this option leaves Authorization at Worker level)
- **1st Level Authorization** (Worker and 1st Level approver)
- **2nd Level Authorization** (Worker, 1st Level Authorization and 2nd Level Authorization)

When **1st** or **2nd Level Authorization** is required for a case action, a task will be generated to the appropriate staff. Staff will need to be configured to accept Authorization-related tasks. Staff Configuration is covered in the Core Configuration Guide.

County Authorizations



County Authorizations

Edit

EDBC	
CalFresh Expedited Service denied for 'FTP Name/Identity'	No
CalWORKs - If special needs amount exists and if it is not the same as pregnancy special needs amount	No
CWS Programs - 2nd level authorization is required when supervisor initiates the EDBC	No
Denial Rescind - Rescind approval date is greater than 30 days from the application date (CW, CF, DV, RCA, and CAPI programs only)	No
Denial Rescind - Rescind approval date is less than or equal to 30 days from the application date	No
Discontinue Rescind - Rescind approval date is greater than 30 days from the discontinuance date (CW, CF, DV, RCA, and CAPI programs only)	No
Discontinue Rescind - Rescind approval date is less than or equal to 30 days from the date of discontinuance	No
Homeless-Temp or Homeless-Perm	No
Immediate Need	No
Manual or Overridden	No
Overpayment	No
Random Sampling	No
Restoration of Aid Waiver	No
Supplement Issuance	No

GA/GR EDBC - Los Angeles County	
GA/GR - Direct rent or rent subsidy exists	No
GA/GR - Special Needs amount is greater than zero	No
GA/GR - Work registration status 'Unemployable' with reason 'Administratively'	No

Fiscal	
Allow same user to approve Payment Requests	Yes
Allow same user to approve Valuable Requests	Yes
Auxiliary Authorization	1st Level Authorization
External Recovery Account	1st Level Authorization
Interest Allocation	1st Level Authorization
Invoice	1st Level Authorization
Issuance Method	1st Level Authorization
Issuance Reissue	1st Level Authorization
Issuance Replacement	1st Level Authorization
Transaction Refund	1st Level Authorization

Fiscal - Payment/Valuable Request
CFET
Cal-Learn
CalWORKs
Child Care
Diversion
Foster Care
GA/GR Automated Solution
GA/GR Employment Services
GA/GR Immediate Need
General Assistance (Managed)
Homeless - Perm
Homeless - Temp
Kin-GAP
RCA
REP
Welfare to Work

Edit

Figure 11 – County Authorizations Page

The **County Authorizations** page lists all configurable options for Authorization designation.

To edit Authorization levels, click the **Edit** button.

County Authorizations EDBC

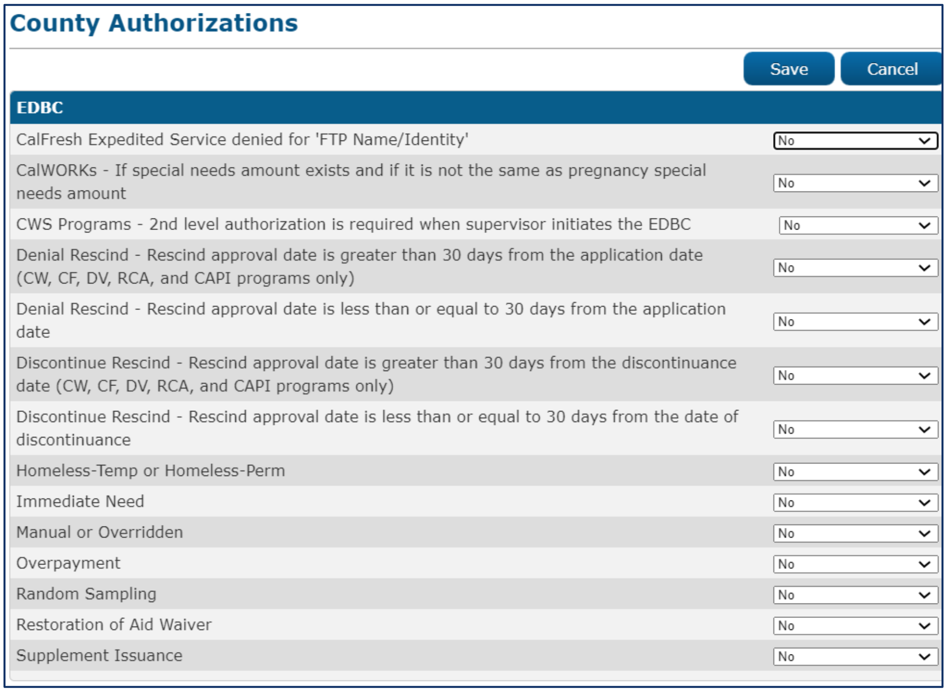


Figure 12 – County Authorizations Page – EDBC Section – Edit Mode

On the **County Authorizations** page, **EDBC** section:

1. Select **No**, **1st Level Authorization**, or **2nd Level Authorization** for each instance of EDBC listed.
2. Click the **Save** button.

County Authorizations Fiscal

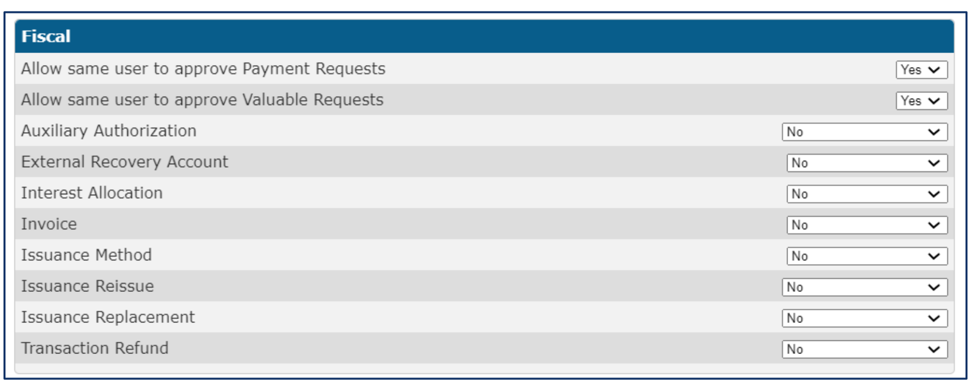


Figure 13 – County Authorizations Page – Fiscal Section – Edit Mode

On the **County Authorizations** page, **Fiscal** section:

1. For **Allow Same User to Approve Payment Requests** and **Allow Same User to Approve Valuable Requests**, select **Yes** or **No.**

2. For all other Fiscal related Authorizations, select **No**, **1st Level Authorization**, or **2nd Level Authorization.**
3. Click the **Save** button.

County Authorizations Fiscal – Payment/Valuable Request

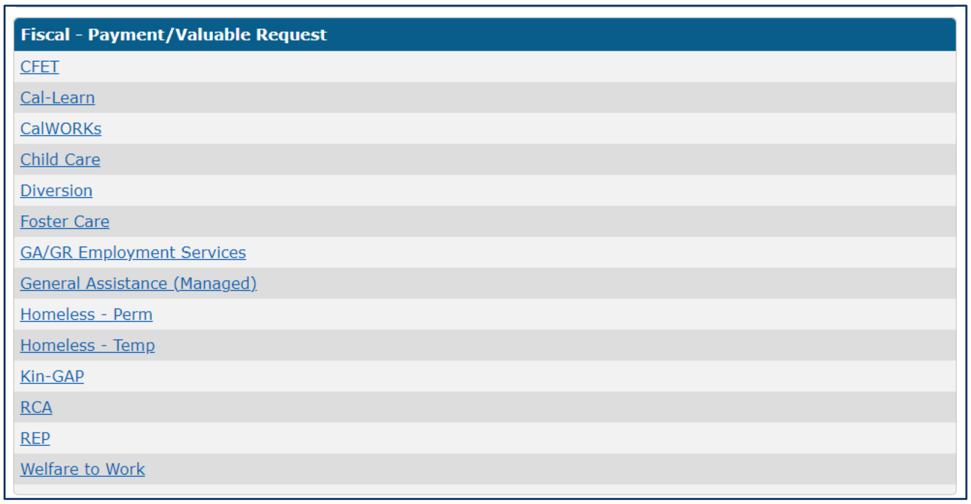


Figure 14 – County Authorizations – Fiscal – Payment/Valuable Request Section

On the **County Authorizations** page, **Fiscal – Payment/Valuable Request** section:

1. Select the **Fiscal - Payment/Valuable Request** you would like to update by clicking on the **Program** hyperlink.

Payment/Valuable Request Authorization List

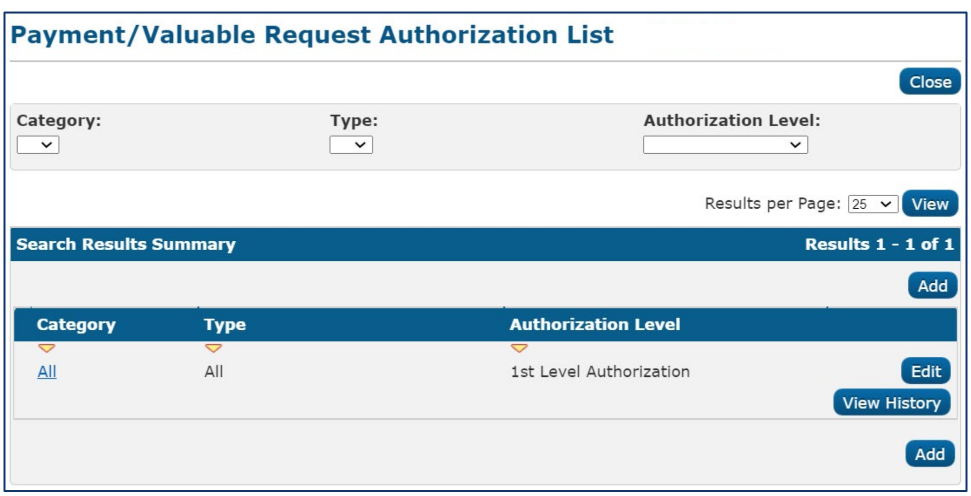


Figure 15 – Payment/Valuable Request Authorization List

On the **Payment/Valuable Request Authorization List** page, the user can edit an existing Authorization or add a new one. To add a new Authorization:

1. Click the **Add** button.

Payment/Valuable Request Authorization Detail

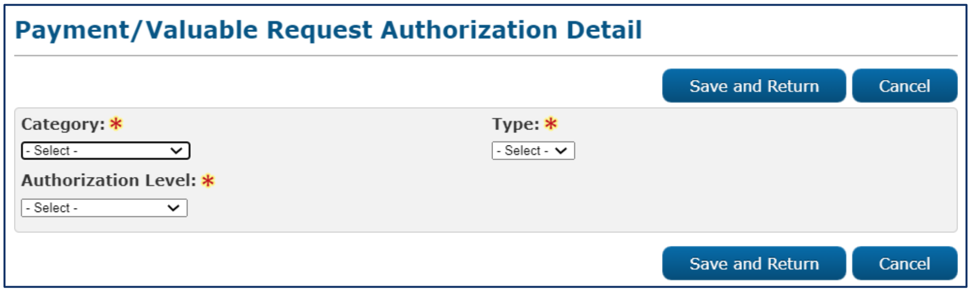


Figure 16 – Payment/Valuable Request Authorization Detail - Add Mode

1. Select **Category**. The Category field will be populated with options specific to the Program selected.
2. Select **Type**. The Type field will be populated with options specific to the Program and Category selected.
3. Select **Authorization Level**. Remember, by selecting **No** you are setting the Authorization requirement at the Worker level.
4. Click the **Save and Return** button.

Page Location

Global: Admin Tools
Local: Admin
Task: County Authorizations

BI Thresholds Configuration

Overview

Benefit Issuance Thresholds are configured by the County to establish the dollar amount of a Benefit or Service Payment that can be approved by a Worker without requiring Supervisor intervention. Benefit Issuance Thresholds are set by Program. CalSAWS will prevent Workers from authorizing EDBC results when the Benefit or Service Payment exceeds the established Threshold.

County Benefit Issuance Thresholds

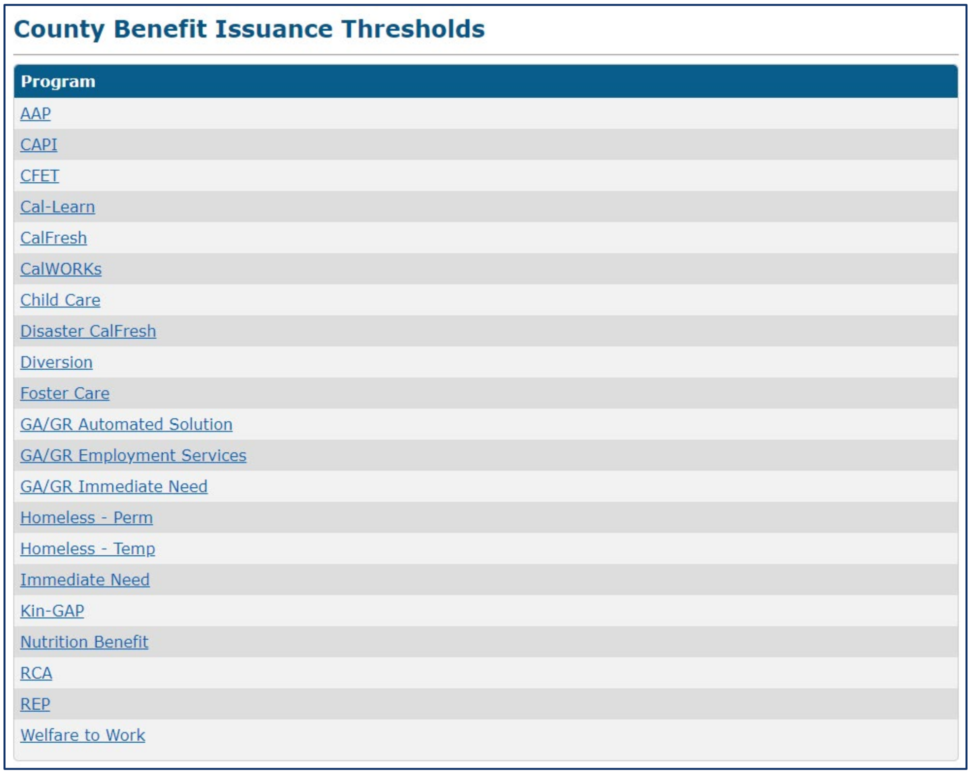


Figure 17 – County Benefit Issuance Thresholds Page

On the County Benefit Issuance Thresholds page:

1. Click the **Program Hyperlink** to set the required Benefit Issuance Threshold.

County Benefit Issuance Thresholds List

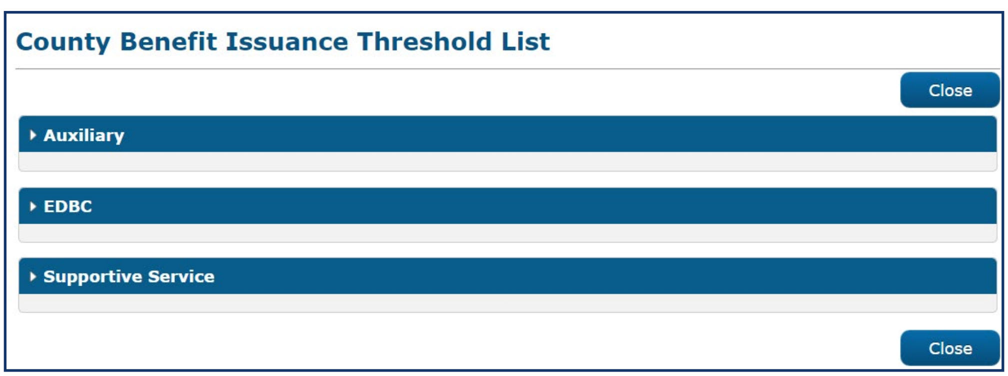


Figure 18 – County Benefit Issuance Threshold List Page

The **County Benefit Issuance Threshold List** page will have dynamic requirements associated to the Program selected. The available areas are **Auxiliary**, **EDBC** and **Supportive Service**.

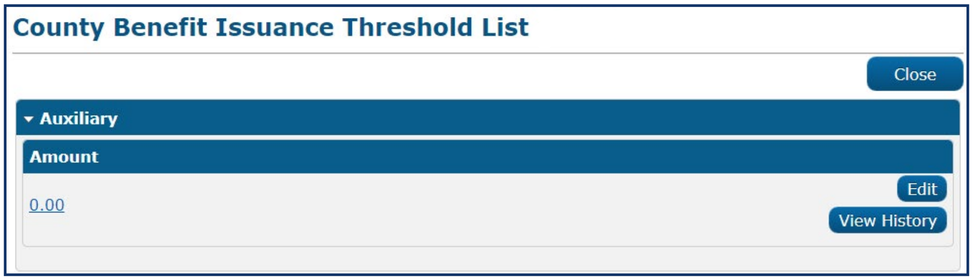


Figure 19 – Auxiliary Authorization Threshold List Page – Auxiliary Section

On the **Auxiliary Authorization Threshold List** page, **Auxiliary** section:

1. Click the Edit button.

Figure 20 – Auxiliary Authorization Threshold Detail Page – Edit Mode

On the **Auxiliary Authorization Threshold Detail** page:

1. Enter **Amount**. A Worker will be able to Authorize Auxiliary Payments up to the amount entered in this field without the need for Supervisor intervention.
2. Click the **Save and Return** button.

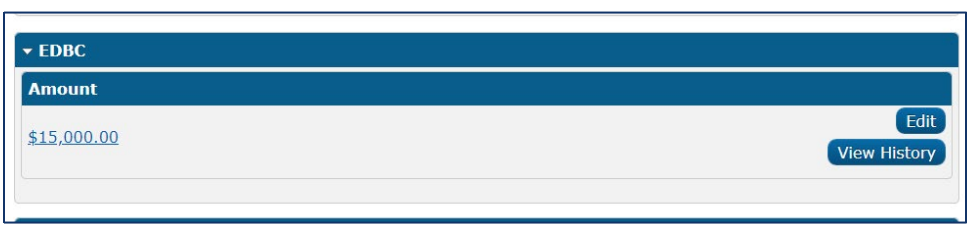


Figure 21 – Auxiliary Authorization Threshold List Page – EDBC Section

On the **Auxiliary Authorization Threshold List** page, **Auxiliary** section:

1. Click the **Edit** button.

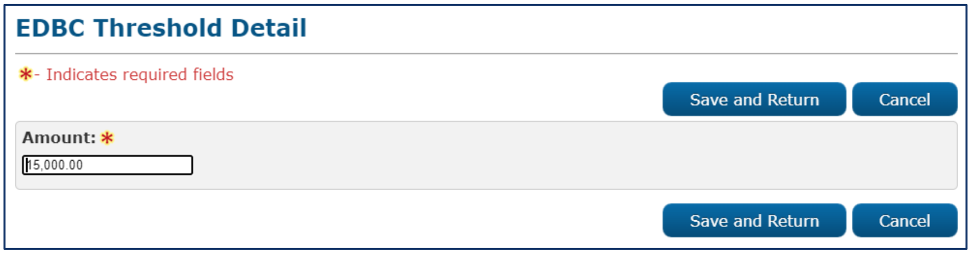


Figure 22 – EDBC Threshold Detail Page – Edit Mode

On the **EDBC Threshold Detail** page:

1. Enter **Amount**. A Worker will be able to Authorize EDBC Payments up to the amount entered in this field without the need for Supervisor intervention.
2. Click the **Save and Return** button.

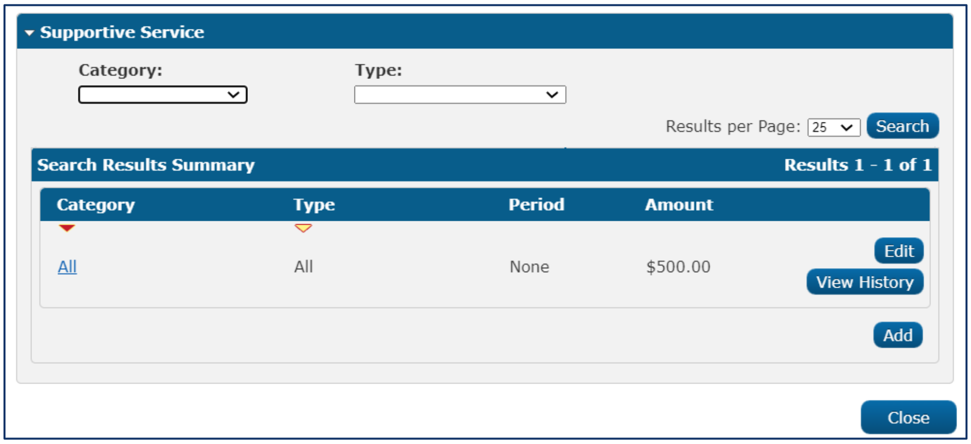


Figure 23 - County Benefit Issuance Threshold Page – Supportive Service Section

When Supportive Service Benefit Issuance Thresholds are associated to the Program selected, the **Supportive Service** section of the **County Benefit Issuance Threshold** page will be available. To add a Supportive Service Issuance Threshold:

1. Click the **Add** button.

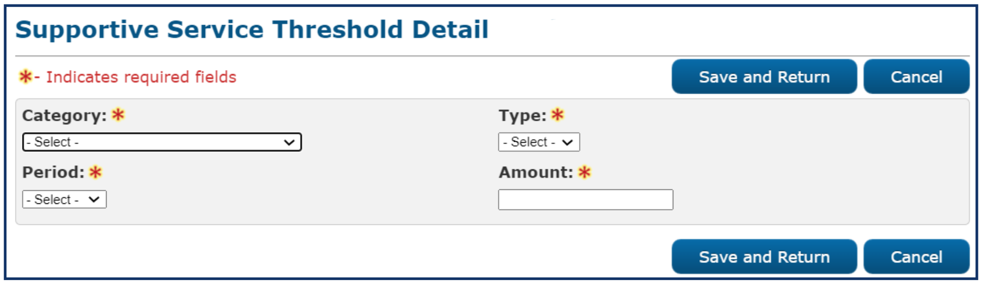


Figure 24 – Supportive Service Threshold Detail Page

On the **Supportive Service Threshold Detail** page:

1. Select **Category**. The Category field will be populated with options specific to the Program selected.
2. Select **Type**. The Type field will be populated with options specific to the Program and Category selected.
3. Select **Period**. The options available are None, Monthly, Quarterly, Yearly, Biennially and Lifetime.
4. Enter **Amount**. This is a free form field. A Worker will be allowed to Authorize the Supportive Service Payment up to the amount entered without Supervisor intervention.
5. Click the **Save and Return** button.

Page Location

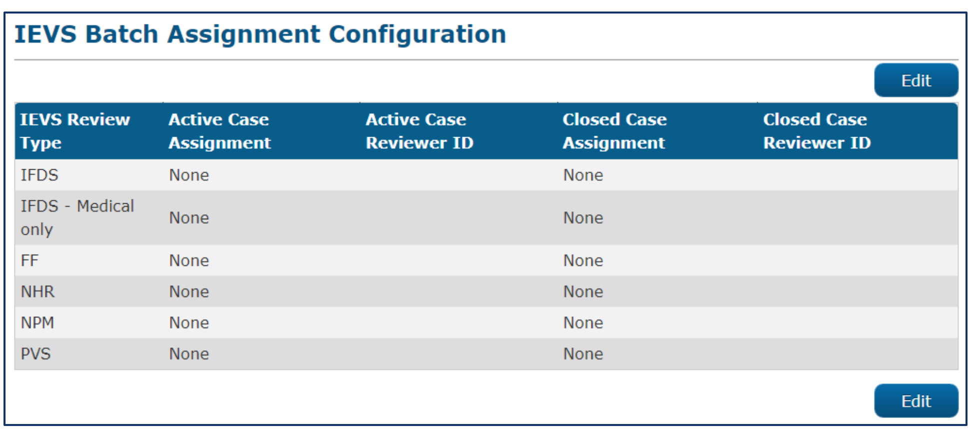
Global: Admin Tools
Local: Admin
Task: County Benefit Issuance Thresholds

IEVS Batch Assignment Configuration

Overview

IEVS Batch Assignments are configured by the County to establish the desired distribution to staff. Through a batch process, Income Eligibility Verification System (IEVS) abstracts can be assigned to a single position, randomly, by case or not at all for each of the IEVS Review Types.

IEVS Batch Assignment Configuration



IEVS Batch Assignment Configuration

Edit

IEVS Review Type	Active Case Assignment	Active Case Reviewer ID	Closed Case Assignment	Closed Case Reviewer ID
IFDS	None		None	
IFDS - Medical only	None		None	
FF	None		None	
NHR	None		None	
NPM	None		None	
PVS	None		None	

Edit

Figure 25 – IEVS Batch Assignment Configuration Page

On the **IEVS Batch Assignment Configuration** Page:

1. Click the **Edit** button

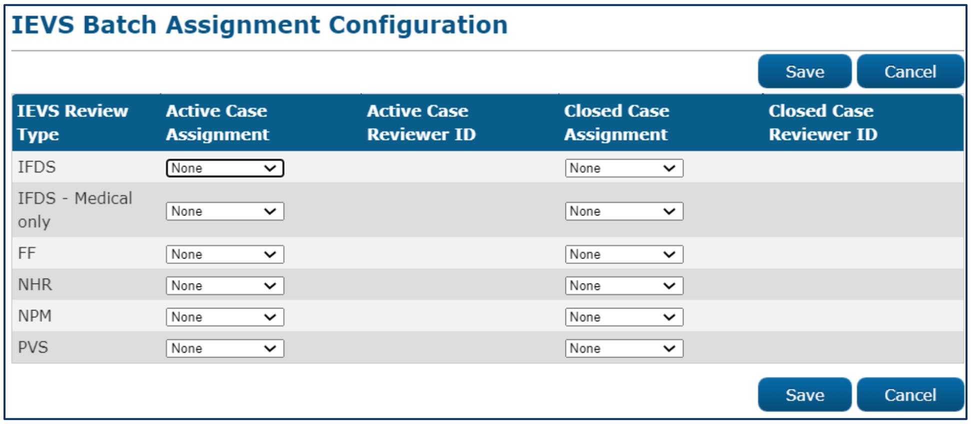


Figure 26 – IEVS Batch Assignment Configuration Page – Edit Mode

On the **IEVS Batch Assignment Configuration** Page:

1. Select **Active Case Assignment**. Options available are None, Case, Random, or Single Position.

   Note: The **Active Case Reviewer ID** will be available for entry when **Single Position** is selected in the **Active Case Assignment** field.

   Note: When Active Case Assignment is Case, a Task will be set for the active program, following Task Management logic.

2. If **Active Case Assignment** is **Single Position,** click the **Select** button and utilize the Search/Select feature to choose the Worker to which the associated IVES abstract will be assigned.
3. Select **Closed Case Assignment.** Options available are None, Case, Random, or Single Position. This selection will determine where the IEVS abstract is distributed for a closed case.

   Note: The **Closed Case Reviewer ID** will be available for entry when **Single Position** is selected in the **Closed Case Assignment** field.

4. If **Closed Case Assignment** is **Single Position,** click the **Select** button and utilize the Search/Select feature to choose the Worker to which the associated IEVS abstract will be assigned.
5. Repeat steps 1 through 4 for each **IEVS Review Type**.
6. Click the **Save** button.

Return to Top

Page Location

Global: Special Units

Local: IEVS Abstracts
Task: IEVS Batch Assignment

Valuables Configuration

Overview

The Valuables Inventory is configurable by the County. Valuables can include items such as Bus Passes, Bus Tickets, Campus Parking, EBT Cards, and Gas Cards. Valuables are created, to then be distributed to customers based on their needs. Customers may either be referred to a third-party provider with a referral or a Service Arrangement can be created to issue a Valuable. Before a Service Arrangement can be created for a Customer, a Need must be first be created in CalSAWS.

Valuable Type List

Through Maintain Valuable Type, Users can create new Valuable types and/or end date existing Valuable types. Valuable types must first be created before they can be added to the Valuable Inventory.

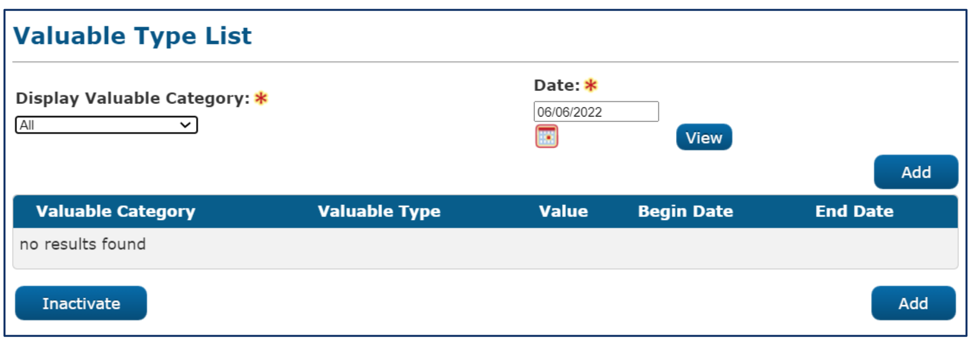
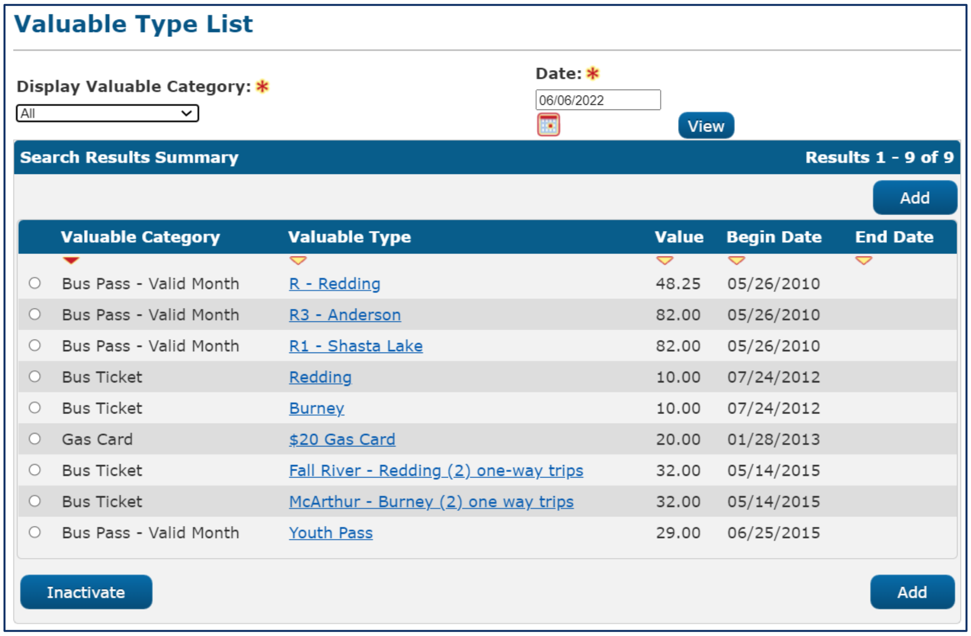


Figure 27 - Valuable Type List Page



Valuable Type List

Display Valuable Category: * All

Date: * 06/06/2022 View

Search Results Summary — Results 1 - 9 of 9

Add

	Valuable Category	Valuable Type	Value	Begin Date	End Date
○	Bus Pass - Valid Month	R - Redding	48.25	05/26/2010	
○	Bus Pass - Valid Month	R3 - Anderson	82.00	05/26/2010	
○	Bus Pass - Valid Month	R1 - Shasta Lake	82.00	05/26/2010	
○	Bus Ticket	Redding	10.00	07/24/2012	
○	Bus Ticket	Burney	10.00	07/24/2012	
○	Gas Card	$20 Gas Card	20.00	01/28/2013	
○	Bus Ticket	Fall River - Redding (2) one-way trips	32.00	05/14/2015	
○	Bus Ticket	McArthur - Burney (2) one way trips	32.00	05/14/2015	
○	Bus Pass - Valid Month	Youth Pass	29.00	06/25/2015	

Inactivate Add

Figure 28 - Valuable Type List Page - Example

On the **Valuable Type List** page:

1. Click the **Add** button.

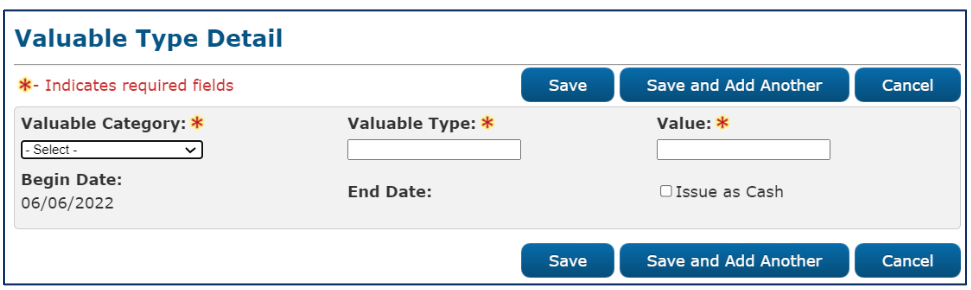


Figure 29 – Valuable Type Detail Page – Add Mode

On the **Valuable Type Detail** page in **Add** mode:

1. Select **Valuable Category**. Categories are defined by the County and maintained at the Project Level. This field is not configurable at the County Level.
2. Select **Valuable Type**. This is a free form field and is configured by the County. As shown in the example above, each Valuable Category can have multiple Valuable Types.
3. Enter **Value**. This is a free form field. User will enter the value, in dollar amount, for the Valuable.
4. Click the check box if the Valuable is to be **Issued as Cash**. If checked, the valuable would be issued as EBT or Warrant.
5. Click the **Save** or **Save and Add Another** button.
6. If the **Save and Add Another** button is clicked, repeat steps 1 through 5.

To End Date a Valuable type, on the Valuable Type List page:

1. Select the radio button for the **Valuable Category** you want to End Date.
2. Click the **Inactivate** button. CalSAWS will enter the End Date using current date.

Valuables Inventory Detail

Through Valuable Inventory, Users will be to add, or remove Valuables from the County Valuables Inventory for a particular office.

Note: **The office is identified as the one that is associated to the worker adding the Valuable. For Valuables to be available in multiple offices, they will need to be added by a user associated to each individual office.**

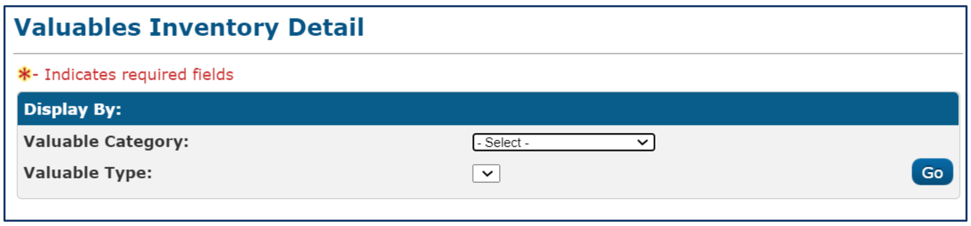


Figure 30 – Valuables Inventory Detail Page

On the **Valuables Inventory Detail** page:

1. Select **Valuable Category**.
2. Select **Valuable Type**.
3. Click the **Go** button.

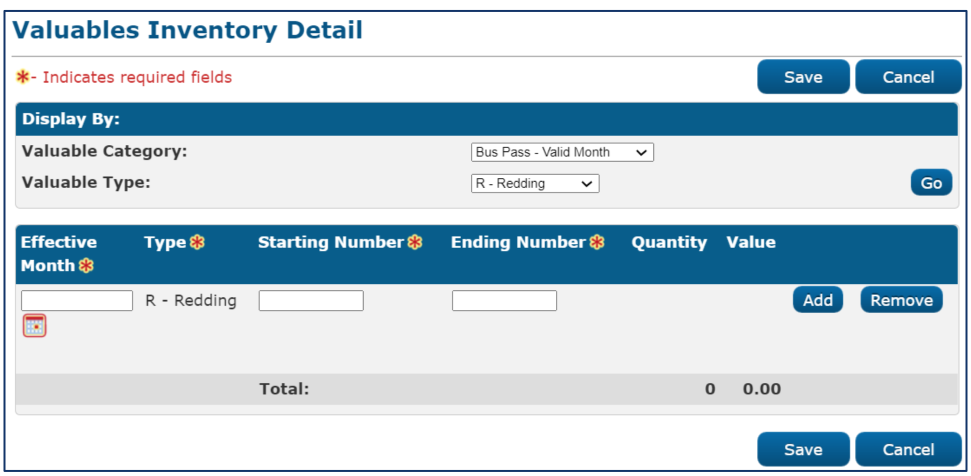


Figure 31 – Valuables Inventory Detail Page – Go Mode

On the **Valuables Inventory Detail** page:

1. Enter **Effective Month**. This is a dynamic field and will only be available if the Valuable Category chosen requires an Effective Month. For example, Bus Pass.

2. Enter **Starting Number**. This is a free form field. Both Starting and Ending Number will be defined by the County.
3. Enter **Ending Number**.
4. Click the **Add** button.
5. Click the **Save** button.

   Note: After the **Add** button is clicked, the Valuable will display with the Starting Number and Ending Number previously defined, these numbers determine the Quantity. The Value will be determined by the value assigned in the Maintain Valuable Type page.

To Remove a Valuable from the Inventory, on the **Valuables Inventory Detail** page:

1. Select the **Valuable Category**.
2. Select the **Valuable Type**.
3. Click the **Go** button.

The following fields are not required; however, they should be completed if applicable:

4. Enter the **Effective Month**.
5. Enter the **Starting Number**.
6. Enter the **Ending Number** field.
7. Enter type in the **Quantity** field.
8. Click the **Remove** button.

Inventory Reason Detail

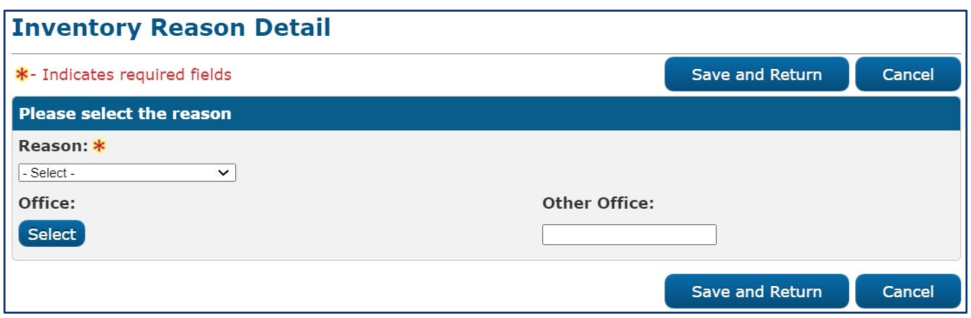


Figure 32 - Inventory Reason Detail Page

On the **Inventory Reason Detail** page:

1. Select **Reason**.
2. Click the **Save and Return** button.

If **Reason** is **Transfer Other Office**:

1. Select **Office.** Utilize the Search/Select feature.
2. Or Enter **Other Office**. This is a free form field.
3. Click the **Save and Return** button.

Page Location

Global: Fiscal
Local: Valuables
Task: Valuable Search

Global: Fiscal
Local: Valuables
Task: Valuable Inventory

Global: Fiscal
Local: Valuables
Task: Maintain Valuable Type

Mileage Rate Configuration

Overview

Milage Rate are configured by the County to establish and maintain mileage rate details. County Mileage Rates are configured in the Valuables area of CalSAWS.

Maintain Mileage Rate

Figure 33 – Mileage Rate List Page

On the **Mileage Rate List** page:

1. Click the **Add** button.

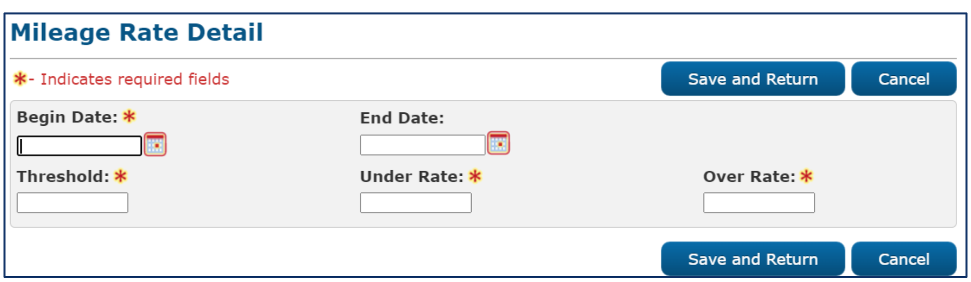


Figure 34 – Mileage Rate Detail Page – Add Mode

On the **Milage Rate Detail** page:

1. Enter **Begin Date**.

2. Enter **Threshold**. This is a "number of miles" threshold to be determined by the County.
3. Enter **Under Rate**. This is the mileage rate that will be paid up to the Threshold set by the County, per trip.
4. Enter **Over Rate**. This is the mileage rate that will be paid when the total number of miles surpass the Threshold set by the County, per trip.
5. Click the **Save and Return** button.

Page Location

Global: Fiscal
Local: Valuables
Task: Maintain Mileage Rate

EBT Printers Configuration

Overview

EBT Printers are configured by the County to establish a **Printer ID** and **Printer Name** and then link the **EBT Printers** to County office locations.

EBT Printer Search

Figure 35 – EBT Printer Search Page

On the **EBT Printer Search** page:

1. Select **Search By**. You can search by County or by Office.
2. If Search By is County, Select **County**. If Search By is Unit, Select **Unit**.
3. You may also search by **Printer ID** and/or **Printer Name**.
4. Click the **Search** button.

To add an EBT Printer, on the **EBT Printer Search** page:

1. Click the Add button.

EBT Printer Detail

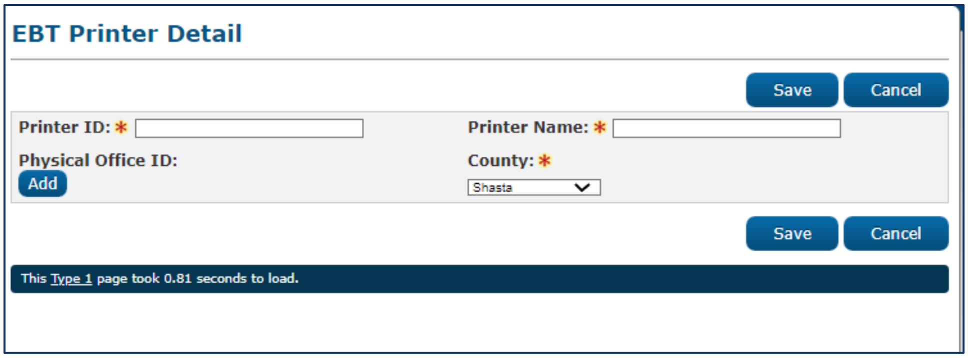


Figure 36 - EBT Printer Detail Page

On the **EBT Printer Detail** screen:

1. Enter **Printer ID**. This is a free form field. Printer ID's will be determined by the County.
2. Enter Printer Name. This is a free form field. Printer Names will be determined by the County.
3. Click the **Add** button to select a **Physical Office ID**. Use the Search/Select feature to select Physical Office ID.
4. Select **County**. This will be the County associated to the Office selected.
5. Click the **Save** button.

Page Location

Global: Fiscal
Local: EBT
Task: EBT Printer Search

Workload Assignment Configuration

Overview

Workload Assignment configuration allows the County to manage workload reassignments. The system provides several options for workload reassignment; worker to worker, worker to office, worker to unit, case to worker, case to office, case to unit, office to office, office to worker, and office to unit.

When an assignment from a Worker or from an eligible position is initiated, a workload assignment instruction is created. The System processes this instruction via a nightly batch process once confirmed. The instruction includes the From, Reassign Quantity, To and Effective Date information. The Reassign Quantity is either the number of cases entered or the entire workload.

You can run EDBC for any month provided there is a Worker currently assigned to the program. You do not need to go back in time and associate a Worker to the program, and the System does not allow this to occur.

Workload Reassignment Detail

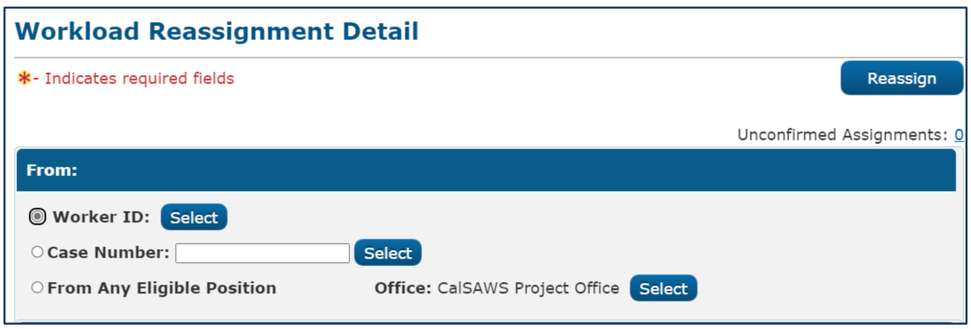


Figure 37 – Workload Reassignment Detail Page – From Section

To designate where cases will be moved from, on the **Workload Reassignment Detail** page, **From** section:

1. Click the **Select** radio button for **Worker ID**. Utilize the Search/Select functionality to select a specific worker to move cases from. This option is processed by the nightly reassignment batch program.

Or

1. Click the **Case Number** radio button.
2. Enter **Case Number.** Search/Select functionality can be used to find Case Number if not known. This option is processed immediately, online.

Or

1. Click the **From Any Eligible Position** radio button. If this option is selected, you an office must be identified.
2. Select **Office**. Utilize the Search/Select functionality.

Figure 38 – Workload Reassignment Detail Page – Reassign Quantity Section

To designate the number and type of cases or programs to be transferred, on the **Workload Reassignment Detail** page, **Reassign Quantity** section:

1. Select the **Number of Cases** radio button.
2. Enter **Number of Cases** to be transferred.

Or

1. Select the **Entire Workload** radio button**.** This option will transfer all cases and all programs to the designated worker.
1. Select **Program(s)**. When transferring a specific case, you can select multiple programs by using the ctrl key on your keyboard. If multiple cases or an entire workload is moved, you can only select one program or All.
2. Select **Language.** The field will be populated with Language options. You can only specify one language, or you can choose Any.

Additional criteria options are available for case/program reassignment. To utilize these criterium:

1. Select **Case Flag**. The field will populate with special indicator options. You can only select one indicator per transfer.
2. Select **Status**. This field will populate with available status options. Only one status can be designated.

Figure 39 – Workload Reassignment Detail Page – To Section

To designate where cases will be transferred to, on the **Workload Reassignment Detail** page, **To** section:

1. Select the **Worker ID** radio button. Utilize the Search/Select functionality to select the Worker you will transfer the designated workload to.

Or

1. Select the **Unit** radio button.
2. Select **Office**. Utilize the Search/Select functionality.
3. Select **Unit**. Once the Office has been selected, the Units associated with that Office will populate in this drop down for selection.

Or

1. Select the **Auto Assign to Eligible Positions** radio button, Cases will be transferred to Workers that have not reached their workload limit.
2. Select **Office**. This field will default to the Office of the User logged into CalSAWS. To select the current office, click the check box. To select a different Office, utilize the Search/Select functionality.

Or

1. Select the **Auto Assign to Eligible Position in The County** radio button.

Figure 40 – Workload Reassignment Detail Page – Effective Date Section

To designate when you want the transfer to occur, on the **Workload Reassignment Detail** page, **Effective Date** section:

1. Select the **Effective Date** radio button.
2. Enter **Date**. You can select the date by clicking on the Calendar icon and choose the date for the new assignment. This date must be equal to or greater than the current date. Any previous assignment is end dated effective the previous date.

Or

1. Select the **Immediate Assignment** radio button. Selecting this option immediately changes the assignment to the new Worker. An immediate assignment begins on the current date and is high dated. Any previous assignment is end dated effective on the previous date.

Figure 41 – Workload Reassignment Detail Page – Reassignment Option Section

On the **Workload Reassignment Detail** page, **Reassignment Option** section:

1. Select **Automatically Reassign When Activated**. The System default selection of this indicator is No. Leaving this selection prevents the nightly batch process from reassigning the program to a new Worker when the status changes from Pending to Active.

   Note: This indicator appears on three pages in CalSAWS and is used to indicate whether the nightly batch process should reassign the program when the status changes from Pending to Active. The three pages are:

   - **Pending Assignment List page** (initial assignment) – Set by the User
   - **Workload Reassignment Detail page** – Set by the User
   - **Program Detail page** – Pulled from the database. The value is based on the View Date.

   When a new assignment is made for Welfare to Work programs, the **Automatically Reassign When Activated** indicator defaults to No. For all other programs processed by the nightly batch, the indicator is left blank. It must be set to No on the Program Detail page if you do not want the program to be automatically reassigned.

2. Select the **Print New Worker Letter** check box. If this check box is not selected a New Worker Letter will not be generated, otherwise, a New Worker Letter will be generated when you save the reassignment.
   Note: A New Worker Letter is also generated when a case/program is automatically assigned by the System. The System generates a New Worker Letter for each new assignment and inserts a journal entry with the information.

3. Click the **Reassign** button.

Page Location

Global: Admin Tools
Local: Workload Assignment
Task: Workload Reassignment

MAGI Referral Assignments Configuration

Overview

MAGI Referral Assignments configuration allows Counties to identify which offices will receive Referrals received through CalHEERS. This configuration is based on Zip Codes.

MAGI Referral Assignments

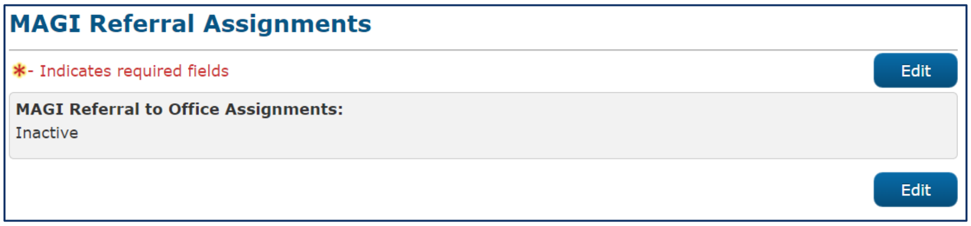


Figure 42 – MAGI Referral Assignments Page

On the **MAGI Referral Assignments** page:

1. Click the **Edit** button.

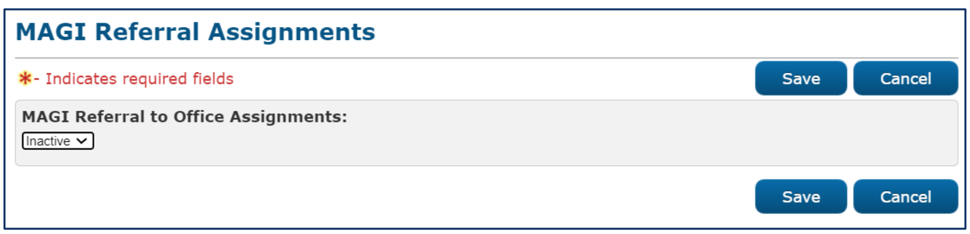


Figure 43 – MAGI Referral Assignments Page – Edit Mode

On the **MAGI Referral Assignments** page in edit mode:

1. Select **MAGI Referral to Office Assignments**. This field defaults to Inactive. No additional action is required if Inactive is selected.
2. Select **Active** in the **MAGI Referral to Office Assignments** field.
3. Click the **Save** button.

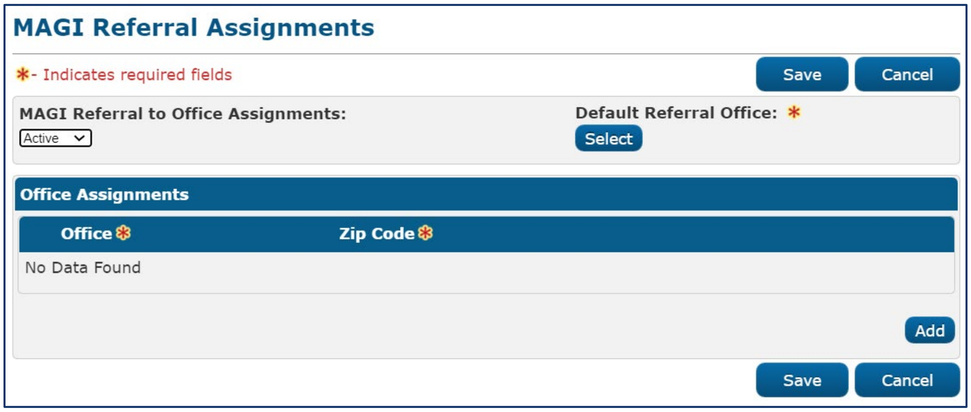


Figure 44 - MAGI Referral Assignments Page – Office Assignments Section

On the **MAGI Referral to Office Assignments** page, **Office Assignments** section:

1. Click the **Add** button.

Office Assignments Detail

Figure 45 – Office Assignments Detail Page

On the **Office Assignments Detail** page:

1. Click the **Select** button to Select an **Office.** Use the Search/Select functionality to choose an Office.
2. Enter **Zip Code(s)**. All MAGI Referrals received from the Zip Codes entered will be assigned to the selected Office.
3. Click the **Save** button.

   Note: Counties can make this feature **Active** or **Inactive** for an office at any time.

Page Location

Global: Admin Tools

Local: Admin
Task: Referral Assignments

Non-County Staff Configuration

Overview

Non-County Staff are configured by **Project Staff**. Once Non-County Staff accounts are created, based on Security Profile, County action can be taken to Activate or Deactivate Non-County Staff accounts.

Non-County Staff will have view-only access within Cal-SAWS which will allow them to view Non-Financial and Financial pages within data collection as well as view correspondence that has been generated for a case. Auditors would be an example of Non-County Staff.

Non-County Staff Search

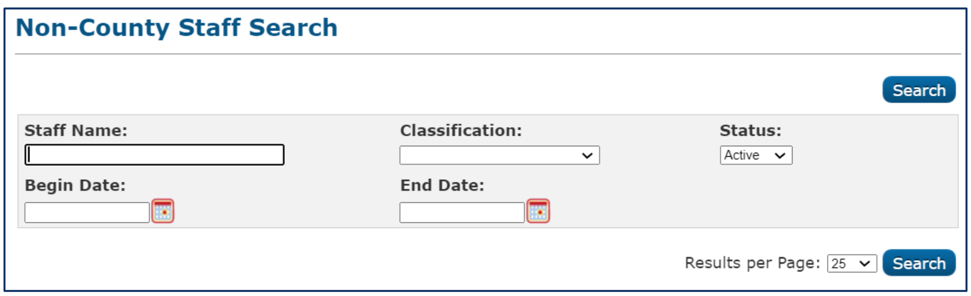


Figure 46 – Non-County Staff Search Page

On the **Non-County Staff Search** page:

1. Enter search parameters **Staff Name**, Select **Classification**, Select **Status**, Enter **Begin Date** or **End Date**.
2. Click the **Search** button.

Figure 47 – Non-County Staff Search Page – Search Results Summary Section

On the **Non-County Staff Search** page**, Search Results Summary** section:

1. Click the **Edit** button associated to the Staff Name you want to Active or Deactivate.

Non-County Staff Detail

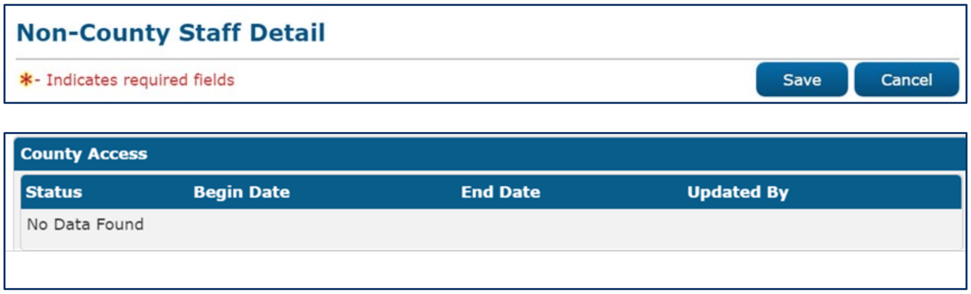


Figure 48 – Non-County Staff Detail Page – County Access Section

On the **Non-County Staff Detail** page, **County Access** section:

1. Select **Status**. Options are Active and Inactive.
2. Enter **Begin Date**. When changing the Status to Inactive, you will need to enter an **End Date**.

   Note: The **Updated By** field will populate with the **User** that is **currently logged** into CalSAWS.

3. Click the **Save** button.

Page Location

Global: Admin Tools
Local: Admin
Task: Non-County Staff

Flags Configuration

Overview

Flags can be configured by the County and provide a way to indicate when there is information that needs to be known about a case or if certain actions must be taken to ensure correct eligibility determinations. There are two distinct Flag categories available; Reporting and Worker Action. When a Flag is associated to a case, an icon displays on the Case Summary page. The Reporting Flag icon is white, and the Worker Action Flag icon is red.

The Reporting category may be used when a county, state, or federal Study is being conducted or for other tracking purposes as designated by the County.

The Worker Action category indicates a worker action is needed to address the flag. Depending on the County business process, a due date may be assigned to Worker Action Flags.

When both Reporting and Worker Action Flags are associated to a case, the red Worker Action Flag icon displays in the top right corner.

Figure 49 – Flag Icons

Flag Search

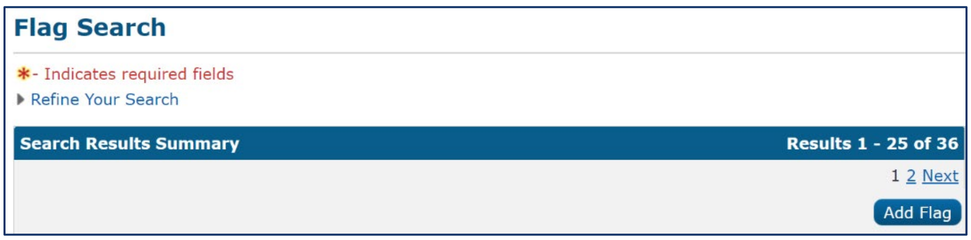


Figure 50 – Flag Search Page

On the **Flag Search** page:

1. Click the **Add Flag** button.

Flag Detail

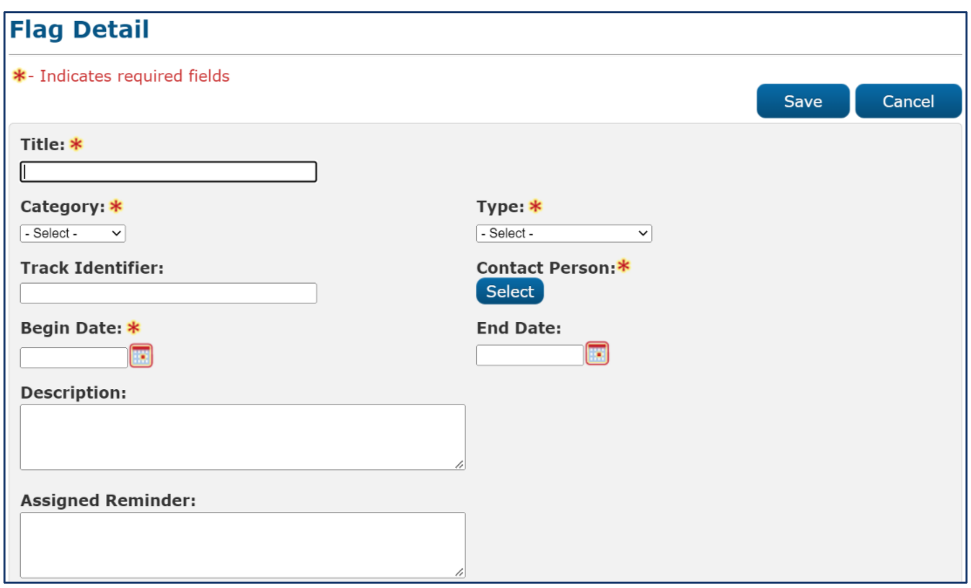


Figure 51 – Flag Detail Page

On the **Flag Detail** page:

1. Enter **Title.** This is a free form field and will be the Name of your Flag.
2. Select **Category**. Options are Reporting or Worker Action.
3. Select **Type**. Options are Additional Skill Needed, Civil Rights, County, Court Case, Error Prone and High Risk, Federal, State, and Study.
4. Enter **Track Identifier**.
5. Select **Contact Person**. Utilize the **Search/Select** feature to select a **Contact Person**.
6. Enter **Begin Date**.
7. Enter **Description**.
8. Enter **Assigned Reminder**.

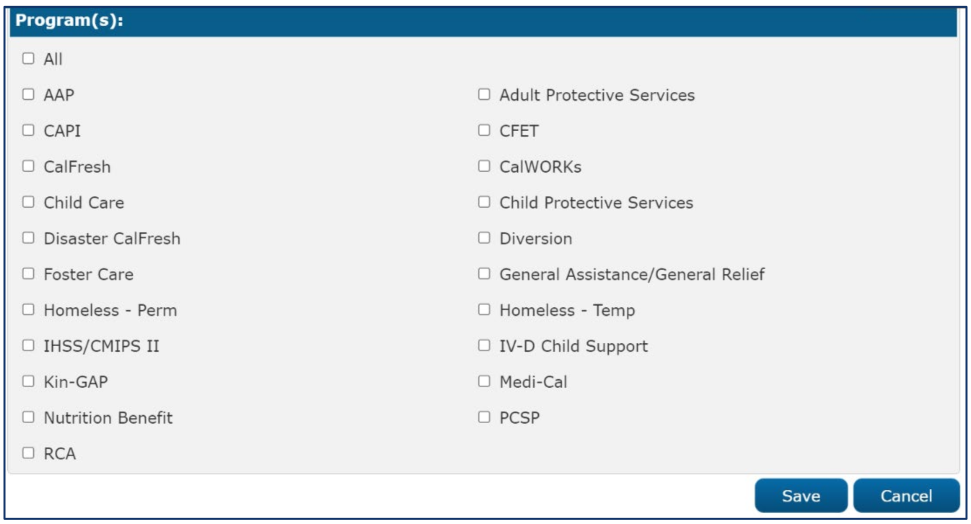


Figure 52 – Flag Detail Page – Program(s) Section

On the **Flag Detail** page, **Program(s)** section:

1. Select **Program(s)** by clicking the associated check box. Programs are not required to be associated to a Flag.
2. Click the **Save** button.
3. Click the **Close** button.

Page Location

Global: Admin Tools
Local: Admin
Task: Flag

Additional Page Location

Global: Special Units
Local: Error Prone
Task: Add/Edit Flags

Error Prone and High Risk Configuration

Overview

Error Prone and High Risk options can be configured by the County to establish and modify profiling criteria which will automatically flag cases. The flags associated with Error Prone and High Risk logic are system flags that exist in the backend and strictly support the Error Prone and High Risk logic. These flags are not searchable on the Flag Search page and cannot be manually added to a case. The system flags associated with Error Prone and High Risk are:

- High Risk - **Correspondence Mismatch**
- High Risk - **Convicted Fraud**
- High Risk - **Multiple Cases**
- Error Prone - **Rent Over TMHI**

Each of these flags have the type of Error Prone and High Risk.

Error Prone and High Risk Search

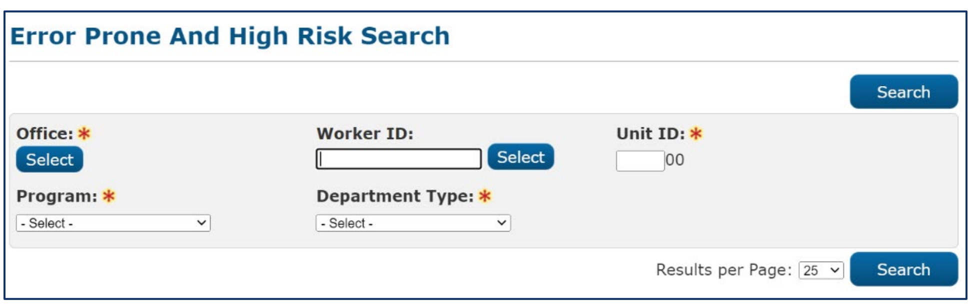


Figure 53 – Error Prone And High Risk Search Page

On the **Error Prone** And **High Risk Search** page:

1. Select **Office**. Utilize the Search/Select feature.
2. Select **Worker ID**. Utilize the Search/Select feature. This criterion is optional.
3. Enter **Unit ID**. This is a free form field and requires a two-digit entry.
4. Select **Program**.
5. Select **Department Type**.
6. Click the **Search** button.

The search results will **list** the Flag, Case ID, Worker ID, Unit ID, Program, Office, Begin Date and End Date for any criterion **identified** as Error Prone and/or High Risk.

Error Prone and High Risk Administration

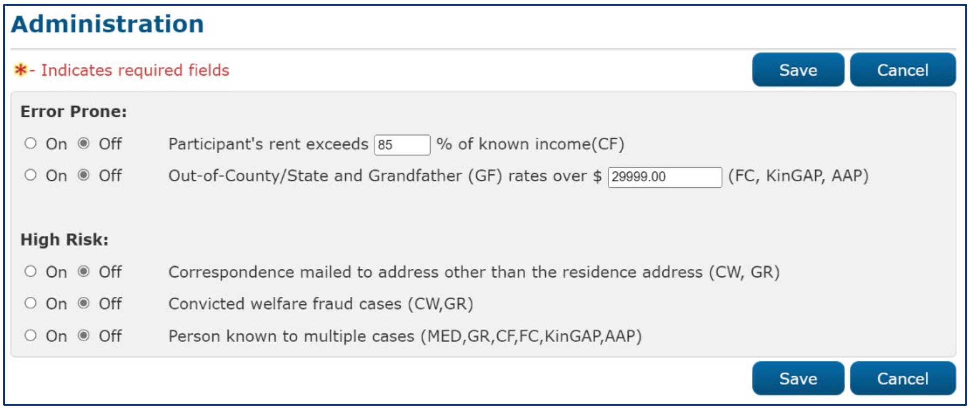


Figure 54 – Error Prone and High Risk – Administration Page

On the **Administration** page, **Error Prone** section:

1. Select the **On** or **Off** radio button for Participant's rent exceeds **%** of known income for the CalFresh program.
2. Enter **Percentage**. This is a free form field.
3. Select the **On** or **Off** radio button for Out-of-County/State and Grandfather (GF) rates over **$** for the Foster Care, KinGAP and AAP programs.
4. Enter **Amount**. This is a free form field that requires a numerical entry.

On the **Administration** page, **High Risk** section:

1. Select the **On** or **Off** radio button for Correspondence mailed to address other than residence address for the CalWorks and GA/GR programs.
2. Select the **On** or **Off** radio button for Convicted welfare fraud case for the CalWORKS and GA/GR programs.
3. Select the **On** or **Off** radio button for Person known to multiple cases for Medi-Cal, GA/GR, CalFresh, Foster Care, KinGAP, and AAP programs.
4. Click the **Save** button.

Page Location

Global: Special Units
Local: Error Prone
Task: Error Prone and High Risk

CalSAWS

Configuration Guide

Chapter Three: Security Role Configuration

Overview

Security Role Configuration and assignment dictates the level of access that a User has in the CalSAWS system. CalSAWS Security Roles are made up of Security Groups. Security Groups can control access to a page in CalSAWS or a function on a page in CalSAWS (e.g., add, edit, issue). Security Roles must be defined for each position type in your County, and once defined, they can then be assigned to staff.

- **Project Maintained Security Roles:**
  There are currently **29** Security Roles created and maintained by the CalSAWS Project.

- **County Security Roles:**
  Roles which are created by, and will be maintained by, the County to support individual County process.

- **Security Groups:**
  There are currently **1498** individual Security Groups in CalSAWS. Additional Security Groups are added when additional pages or functionality are added to the system.
  Note: of the 1498 Security Groups available, **332** Groups are not assigned to any Project Maintained Role, due to the nature of the security group. You can find a listing of unassigned groups by accessing the Unassigned Security Groups document, Appendix E.

Note: Every User must have at least one Security Role assigned to successfully log into the CalSAWS System.

Project Maintained Roles

The following Roles have been created by, and are maintained by, the CalSAWS project. Each Role includes the minimal Security Groups needed to access the core pages and functions related to that Role. Additional Security Groups can be used in combination with a Project Maintained Role to provide desired access based on County process.

At the time of migration, the Project Maintained Security Roles will be available for selection.

You can find all Security Groups, that are included in each Role, by accessing the CalSAWS Page Mapping Matrix, Appendix F. This matrix will be updated with every Major Release to include any new Security Groups.

Project Maintained Roles	
• Child Care Staff	• Hearings Staff
• Child Care Supervisor	• Hearings Supervisor
• Clerical Staff	• Help Desk Staff

• Clerical Supervisor	• Marketing Staff
• Collections Staff	• Marketing Supervisor
• Eligibility Staff	• Oversight Agency Staff
• Eligibility Supervisor	• Quality Assurance Staff
• Employment Services Contracted Staff	• Quality Assurance Supervisor
• Employment Services Contracted Supervisor	• Quality Control Staff
• Employment Services Staff	• Quality Control Supervisor
• Employment Services Supervisor	• RDB Staff
• Executive	• RDB Supervisor
• Fiscal Staff	• Special Investigations Staff
• Fiscal Supervisor	• Special Investigations Supervisor
	• View Only

Note: There are known Security Groups, that are related to specific functions, which are not currently included in an existing Project Maintained Role. A few examples of these Security Groups are related to Imaging, Foster Care, AAP, GA/GR, and Confidentiality. These groups can be assigned to a County Security Role or assigned to a User in combination with a Project Maintained Role, to meet a county business need or for assignment to specialized staff.

County Security Roles

CalSAWS allows each County to create Security Roles specific to their business needs. It is recommended that County Security Roles be created to stand alone, meaning they include all necessary Security Groups. Although it is possible to have multiple Security Roles and Security Groups assigned to a User, it is ideal to have a Security Role that captures business need entirely.

Once Security Roles are created, the resulting Security Role can be assigned to Staff on the **Security Assignment Detail** page. Security Profiles are used to outline how staff access data within CalSAWS. These profiles define the authority level for each Staff member and establish access rights to pages and functions within the CalSAWS system.

It is important to create Security Roles that allow the correct level of User access to the System. ***Too little will create roadblocks, too much could allow rights to pages or functions that the User should not access.***

Creating County Security Roles

County Security Role List

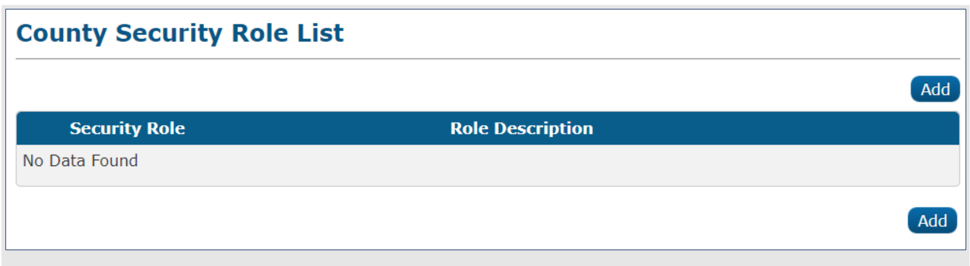


Figure 1 – County Security Role List Page

The **County Security Role List** page displays Security Roles and Role Descriptions that have been defined by the County. From this page, Users with the appropriate Security Profile can view, edit, and add Security Roles.

To edit a Security Role, on the **County Security Role List** page:

1. Click the **Edit** button for the Security Role you would like to Edit.

To create a Security Role, on the **County Security Role List** page:

1. Click the **Add** button.

County Security Role Detail

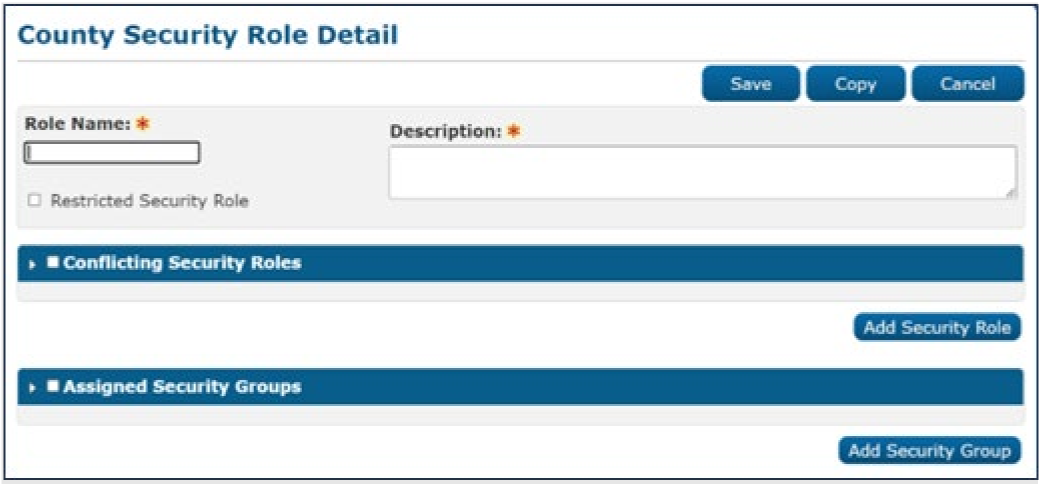


Figure 2 – County Security Role Detail Page – Create Mode

On the **County Security Role Detail** page, you can create, edit, or remove Security Groups from a County Specific Security Role.

On the **County Security Role Detail** page:

1. Enter **Role Name.** This is a free form text field defined by the County.
2. Enter **Description.** This is a free form text field defined by the County.

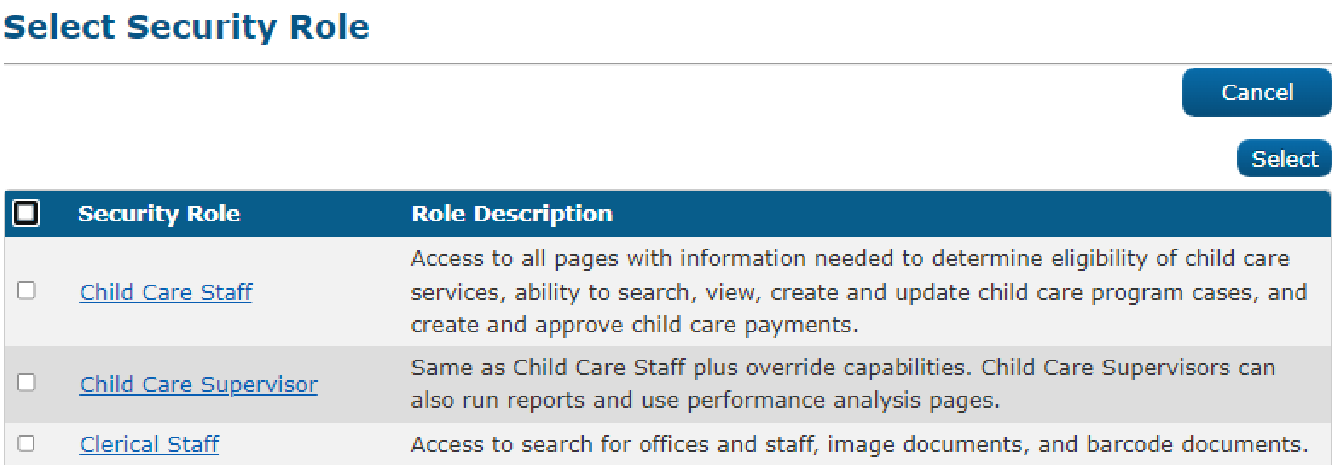
Copy Feature

Security Roles can include multiple Security Groups. CalSAWS has a copy feature that allows an existing Security Role (collection of Security Groups) to be copied into a Security Role being created by the County. This feature will assist in the efficient creation of County Security Roles.

To include all Security Groups currently assigned to a Project Maintained Security Role or existing County Security Role:

1. Click the **Copy** button.

Select Security Role



Select Security Role

Cancel

Select

☐	Security Role	Role Description
☐	Child Care Staff	Access to all pages with information needed to determine eligibility of child care services, ability to search, view, create and update child care program cases, and create and approve child care payments.
☐	Child Care Supervisor	Same as Child Care Staff plus override capabilities. Child Care Supervisors can also run reports and use performance analysis pages.
☐	Clerical Staff	Access to search for offices and staff, image documents, and barcode documents.

Figure 3 – Select Security Role – Copy Mode

On the Select Security Role page:

1. Click the **Checkbox(s)** associated to the Security Role(s) you would like to copy.
2. Click the **Select** button.

Conflicting Security Roles

The **Conflicting Security Roles** section of this page is used to separate duties and make sure that one worker doesn't have roles that may give them too much access without oversight, in other words, it can be used to prevent a worker from having too much security. As an **example**, you could create a Security Role that allows the creation of payment requests and a Security Role that allows you to approve payment requests. You could add the Security Role of Create Payment Requests as a conflicting role to the Security Role for Approve Payment Requests. When the County Security Role is then assigned to a staff member, they will be prevented from being assigned a Security Role that allows them to create and approve their own payments.

To add a **Conflicting Security Role**:

On the **County Security Role Detail** page, **Conflicting Security Roles** section:

1. Click the **Add Security Role** button.

On the **Select Security Role** page:

1. Click the check box(es) for the security role(s) you want to add.
2. Click the **Select** button.

Assigned Security Groups

Figure 4 – Assigned Security Groups Section – Add Security Group Button

On the **County Security Role Detail** page, **Assigned Security Groups** section:

1. Click the **Add Security Group** button.

Note: Security Groups are defined and maintained at the Project Level. They cannot be created or modified by individual Counties.

Select Security Group

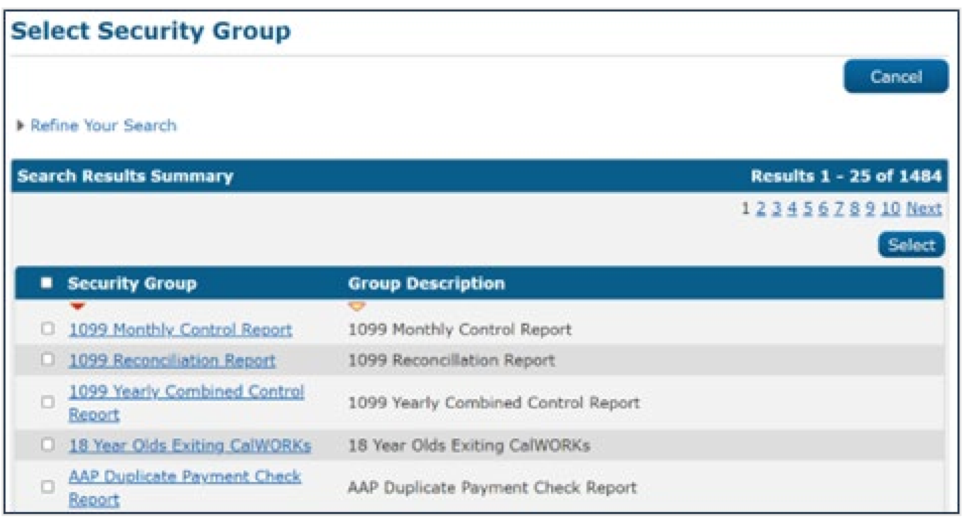


Figure 5 – Select Security Group Page

On the **Select Security Group** page:

1. Click the check box(es) for the group(s) you want to add.

Note: You may use the **Refine Your Search** section and click the **Search** button to search for specific security groups. You may also click the **Security Group** hyperlink to view the individual **Security Rights** that makeup the **Security Group**.

2. Click the **Select** button.

On the **County Security Role** Detail page:

1. Click the **Save** button.

Once you have created a **County Security Role**, that Role will then be found in the Security Role list for assignment.

Assigning Security Roles

Staff Search

From Admin Tools on the Global navigation bar, select Office Admin on the Local navigator. On the Task navigation bar, select Staff.

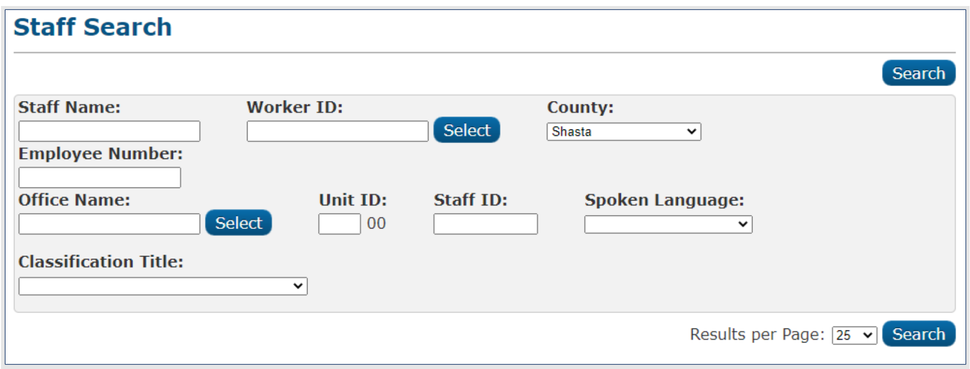


Figure 6 – Staff Search Page

On the **Staff Search** page:

1. Enter desired parameters to locate the staff member.
2. Click the **Search** button.

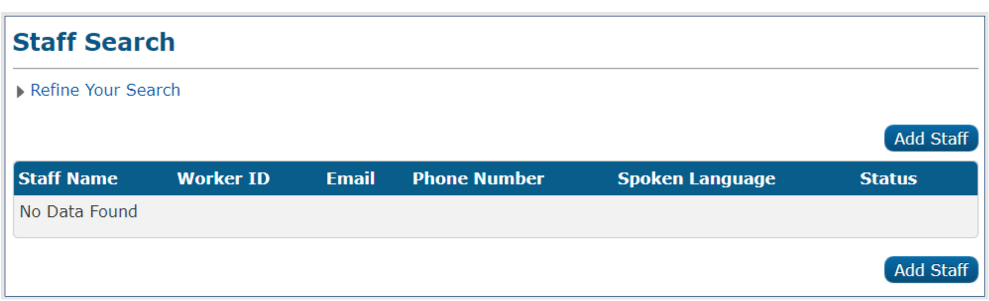


Figure 7 – Staff Search Results – Add Staff Button

On the **Search Results Summary** you will determine if the staff member already exists or must be added.

To create a staff member:

On the **Staff Search** page, **Search Results Summary**:

1. Click the **Add Staff** button. Step by step instructions to add a staff member are provided in the CalSAWS Configuration Guide and are also available in the CalSAWS Job Aid.

To edit a current staff member:

On the **Staff Search** page, **Search Results Summary**:

2. Click the **Staff Name** hyperlink for the person you need to edit.

Staff Detail

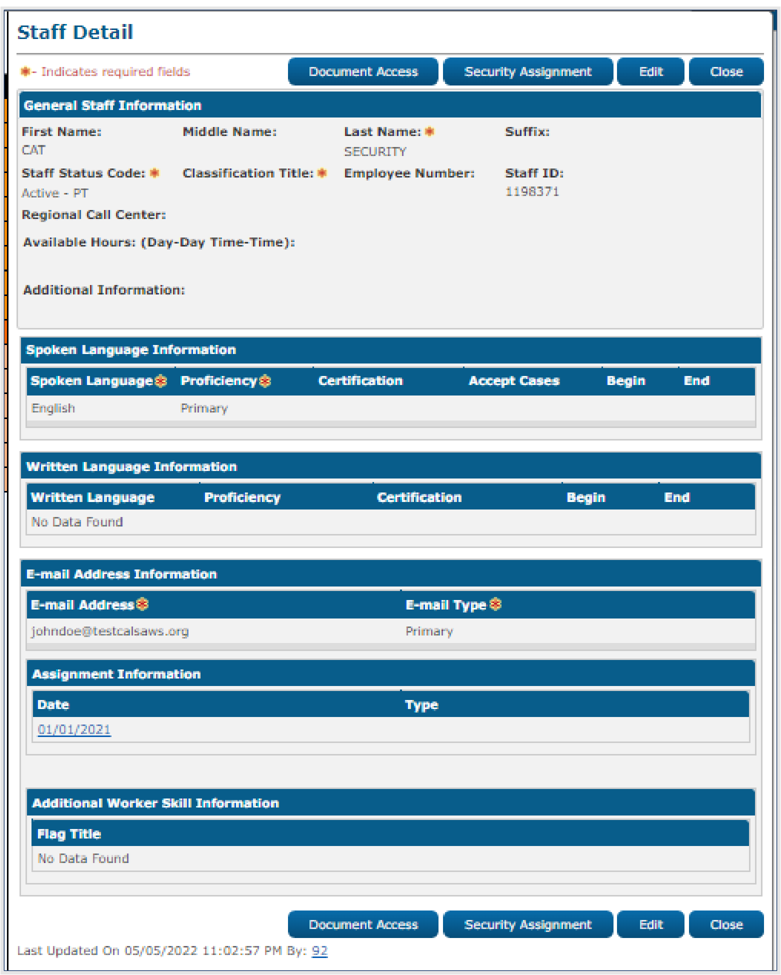


Figure 8 – Staff Detail Page

On the **Staff Detail** page:

1. Click the **Security Assignment** button at the top or bottom of the page.

Security Assignment

The **Security Assignment** page can be accessed from the **Staff Detail** page and the **Non-Staff Detail** page. It is CRUTIAL that a Security Assignment be complete when adding Staff. Without a Security Assignment, staff will not be allowed to log in to perform the needed functions in CalSAWS. To add a Security Profile, you can utilize the Add Security Role and Add Security Group buttons or, you can click the Copy Security Profile button. If you are adding Staff that have "like" Security Profiles, the Copy Security Profile is an efficient option.

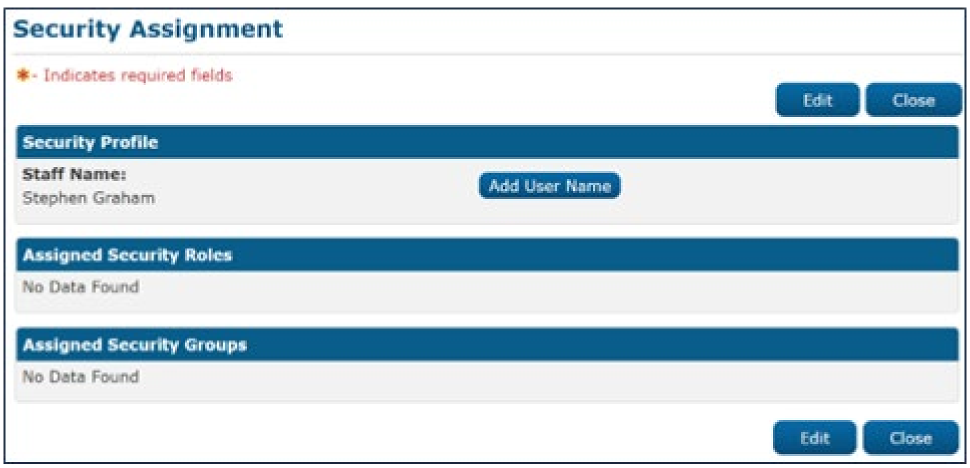


Figure 9 – Security Assignment Page – Add User Name Button

On the **Security Assignment** page, Security Profile section:

1. Click the **Add User Name** button.

Figure 10 – Security Assignment Page – Security Profile Section – Reset Password Button

Note: Once you click the Add User Name button, CalSAWS will assign a CalSAWS User Name and Temporary Password. This page is also where a password can be reset by clicking the Reset Password button.

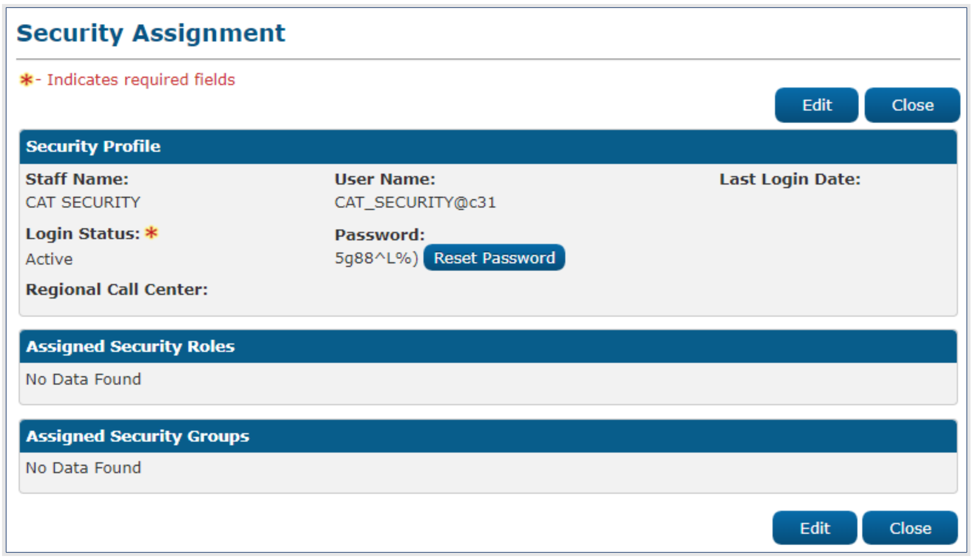


Figure 11 – Security Assignment Page – Edit Button

On the **Security Assignment** Page:

1. Click the **Edit** button.

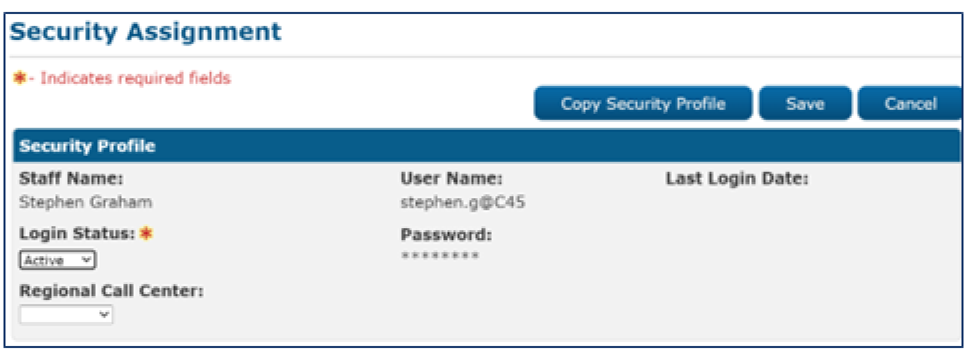


Figure 12 – Security Assignment Page – Security Profile Section - Edit Mode

On the **Security Assignment** page, **Security Profile** section:

1. Select **Login Status**. Your otions are Active and Inactive.

2. If appropriate, select assignment to **Regional Call Center**. Options are Staff and Supervisor. This filed will only be used if your County is a designated Regional Call Center. This field allows Users to access information in all CalSAWS Counties.

Figure 13 – Security Assignment Page – Add Security Role Button

To Add a Security Role, on the **Security Assignment** page, **Assigned Security Roles** section:

1. Click the **Add Security Role** button.

Note: The Security Roles that are available at migration, are the Project Maintained Security Roles. Additional Security Groups may need to be assigned to a User's security profile, in addition to a Project Maintained Role, for a User to have needed system access.

Select Security Role

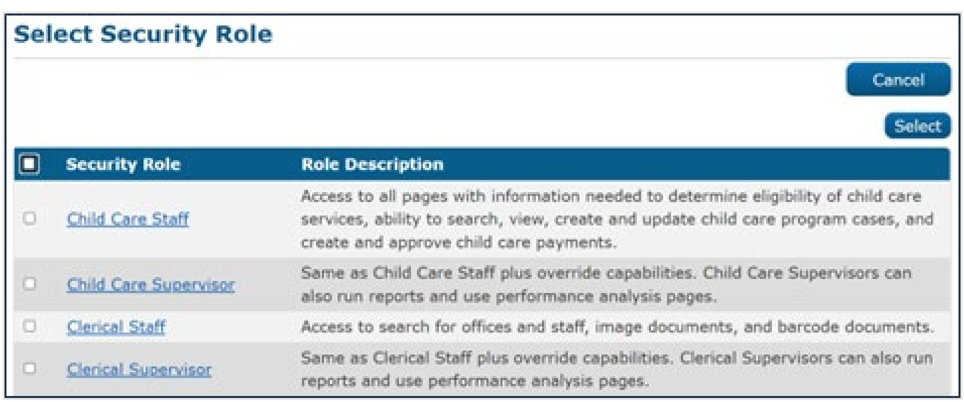


Figure 14 – Select Security Role Page – Security Role Section

On the **Select Security Role** page:

1. Click the check box next to the desired **Security Role(s).**
2. Click the **Select** button.

Figure 15 – Security Assignment Page – Add Security Group Button

On the **Security Assignment** page, **Assigned Security Group** section:

1. Click the **Add Security Group** button.

Figure 16 – Select Security Group Page – Security Group Section

On the **Select Security Group** page:

1. Click the check box next to the desired **Security Group(s).**
2. Click the **Select** button.

On the **Security Assignment** page:

1. Click the **Save** button.
2. Click the **Close** button.

On the Staff Detail page:

1. Click the **Close** button.

Copying A Security Profile

There may be instances when you wish to assign the same Security Profile of one staff member to another. You can do this by using the Copy Security Profile feature.

Before copying Security Profiles in the System, you must first gather the following information:

- Staff name of the person to receive the Security Profile.
- Staff name of the person from which you wish to copy the Security Profile.

Security Assignment

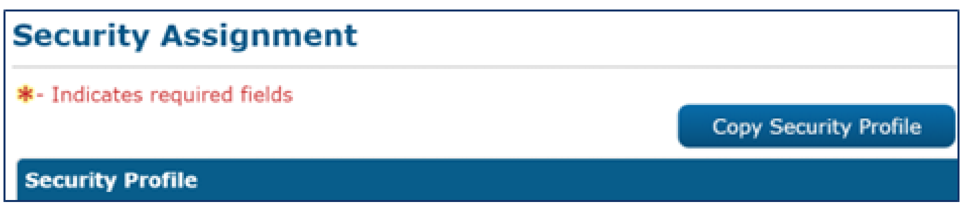


Figure 17 – Security Assignment Page – Copy Security Profile Button

To Copy a Security Profile, on the **Security Assignment** page:

1. Click the **Copy Security Profile** button.

On the **Select Worker** Page:

2. Utilize the **Search** feature to enter the *information of the staff person whose **Security Profile** you want to copy*.
3. Click the **Search** button.
4. Select the radio button for the appropriate staff person.
5. Click the **Select** button. This will populate the Assigned Security Roles and Assigned Security Groups section(s) with the Role(s) and Group(s) associated with the Worker selected.

On the **Security Assignment** page:

1. Click the **Save** button.

Combining Project Maintained with County Security Roles

You can add any number of Security Groups to a given County Security Role. County Security Roles can be created for use in lieu of a Project Maintained Role, or they can be used in combination with a Project Maintained Role.

Here is an **example** of a Project Maintained Role, enhanced by a County Security Role.

This Security Assignment is for an Eligibility Staff member that is responsible for processing Inter County Transfers (ICT). The Project Maintained, Eligibility Staff, Security Role does not include all Security Groups needed to access all pages and functions related to processing an ICT.

The County has created a County Security Role, Placer – Inter County Transfers, to enhance the Project Maintained, Eligibility Staff, Role. The County Security Role includes the additional Security Groups needed to perform all required ICT functions.

Security Assignment

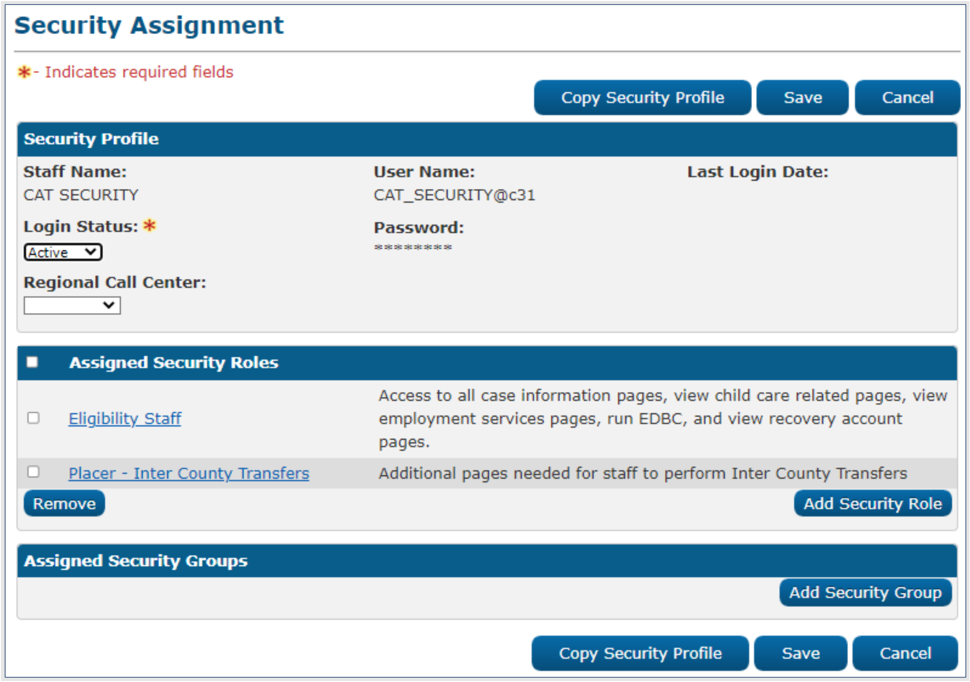


Figure 18 – Security Assignment Page – Assigned Security Roles Section

Security Role Detail

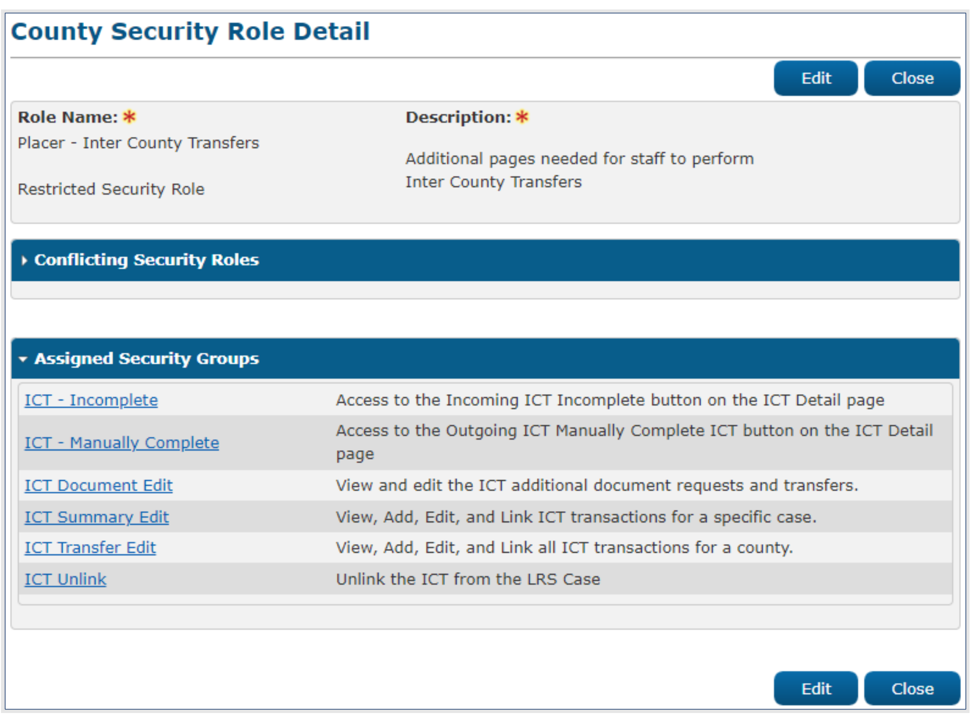


Figure 19 – County Security Role Detail Page

Security Role Preparation Checklist: Things to Consider

Overview

This checklist includes Security Groups, that are not currently included in the Project Maintained Roles. This list is provided so counties can consider including the identified Security Groups in a County Security Role, that can be assigned to Staff, to ensure the appropriate level of System access. This list is not all inclusive but, gives Counties an idea of things to consider when creating County Security Roles. As gaps are identified, County Security Roles can easily be edited.

Clerical Staff

- ❑ Authorized Representative Detail View
- ❑ Authorized Representative List View
- ❑ C4Yourself Registration Edit
- ❑ Call Log Edit
- ❑ Case Flag Edit
- ❑ Customer Activity View
- ❑ Customer Appointment Edit
- ❑ Customer Contact History View
- ❑ Customer Reporting View
- ❑ Customer Schedule
- ❑ Demographics Edit
- ❑ Demographics View
- ❑ Documents
- ❑ EApp Case Link
- ❑ EApp Case Unlink
- ❑ EApp Decline
- ❑ EApp Edit
- ❑ EApp Edit Select
- ❑ EApp Worker Assignment
- ❑ EBT Card Add Manual

- ❑ EBT Card Edit
- ❑ EBT Card Print
- ❑ EBT Card Print List Edit
- ❑ EBT Printer
- ❑ Eligibility View
- ❑ Eligibility Workload Inventory
- ❑ File Clearance
- ❑ ICT Summary Edit
- ❑ ICT Summary View
- ❑ ICT Transfer Edit
- ❑ ICT Transfer View
- ❑ IHSS Referral Case Link
- ❑ IHSS Referral Edit
- ❑ Imaging - Document Capture Report
- ❑ Imaging - Exception Queues Aging Report
- ❑ Imaging - Initial QA Report
- ❑ Imaging Auditing
- ❑ Imaging Capture
- ❑ Imaging Copy
- ❑ Imaging County Capture
- ❑ Imaging County Exception
- ❑ Imaging County Person Select
- ❑ Imaging County Supervisor
- ❑ Imaging Document Remove
- ❑ Imaging Export
- ❑ Imaging Global Application
- ❑ Imaging Search Case
- ❑ Imaging Search Person
- ❑ Individual Intake
- ❑ Intake Edit
- ❑ Intake Flow
- ❑ Inter-Agency Transfer Summary View
- ❑ Issuance View
- ❑ Journal Create
- ❑ Journal Edit
- ❑ MAGI Referral Unlink
- ❑ Message Center Notify
- ❑ Non-Financial Edit
- ❑ Plan View
- ❑ Program Edit
- ❑ Program History
- ❑ Service Arrangements View
- ❑ Targeted Low Income Detail Edit
- ❑ Targeted Low Income Person Detail View

- Targeted Low Income Search View
- Task Edit
- Tasks Reminders
- Weekend Appointment Schedule
- Workload Assignment Edit

Collections Staff

- BI Consumer
- Collections Reports
- Foster Care Transaction Add
- Tax Intercept Reports

Eligibility Staff

- Application Detail Active Edit
- Burial Detail Edit
- Burial List View
- Call Log Edit
- Case Copy List Edit
- Case Flag Edit
- CMSP
- Confidentiality Employee Relative View
- Customer Contact History View
- EApp Case Link
- EApp Case Unlink
- EApp Decline
- EApp Edit
- EApp Edit Select
- EApp View
- EApp Worker Assignment
- EBT Card Add Manual
- EBT Card Unlock PIN
- Eligibility Reports
- Fiscal Search All Departments
- Get Next
- ICT Summary Edit
- ICT Transfer Edit
- Imaging Capture
- Imaging Confidential Export
- Imaging Confidential Search
- Imaging Confidential View
- Imaging Copy
- Imaging County Capture

- ❑ Imaging County Exception
- ❑ Imaging County Person Select
- ❑ Imaging County Supervisor
- ❑ Imaging Export
- ❑ Imaging Global Application
- ❑ Imaging Search Case
- ❑ Imaging Search Person
- ❑ Inter-Agency Transfer Summary View
- ❑ Journal Create
- ❑ Legacy Case List Edit
- ❑ MAGI Referral Unlink
- ❑ Message Center Notify
- ❑ Notes Edit
- ❑ Payment Requests Edit
- ❑ Reception Log Edit
- ❑ Redeter Due Month Edit
- ❑ Reports
- ❑ Skipped Issuance Report
- ❑ Targeted Low Income Detail View
- ❑ Targeted Low Income Person Detail View
- ❑ WTW Case Comments Report
- ❑ WTW Legacy Case Report

Help Desk Staff (Administrator)

- ❑ Audit
- ❑ Authorized Representative Remove Program
- ❑ Authorized Representative Remove
- ❑ Automated Actions Edit
- ❑ Bank Edit
- ❑ Case Flag Edit
- ❑ Case Flag List Remove
- ❑ Flag Update
- ❑ Flag View
- ❑ Imaging
- ❑ Imaging - Document Capture Report
- ❑ Imaging - Exception Queues Aging Report
- ❑ Imaging - Initial QA Report
- ❑ Imaging Adoptions Capture
- ❑ Imaging Adoptions Export
- ❑ Imaging Adoptions View
- ❑ Imaging Annotations
- ❑ Imaging Annotations Admin

- Imaging Auditing
- Imaging Capture
- Imaging Confidential Export
- Imaging Confidential Reindex
- Imaging Confidential Reindex All
- Imaging Confidential Search
- Imaging Confidential View
- Imaging Copy
- Imaging County Capture
- Imaging County Confidential Exception
- Imaging County Exception
- Imaging County Person Select
- Imaging County Supervisor
- Imaging CWS Capture
- Imaging CWS Export
- Imaging CWS View
- Imaging Detail
- Imaging Document Remove
- Imaging Export
- Imaging Global Application
- Imaging Hearings Capture
- Imaging Hearings Export
- Imaging Hearings View
- Imaging IHSS Capture
- Imaging IHSS Export
- Imaging IHSS View
- Imaging No Task Creation Override
- Imaging Office Capture
- Imaging Office Confidential Exception
- Imaging Office Exception
- Imaging Office Person Select
- Imaging Office Supervisor
- Imaging Override No Change SAR7 QR7
- Imaging Person Scope Override
- Imaging Program Override
- Imaging QA QC Capture
- Imaging QA QC Export
- Imaging QA QC View
- Imaging RDB Capture
- Imaging RDB Export
- Imaging RDB View
- Imaging Reindex
- Imaging Reindex All
- Imaging Reindex Route

- ❑ Imaging Search Case
- ❑ Imaging Search Person
- ❑ Imaging SIU Capture
- ❑ Imaging SIU Export
- ❑ Imaging SIU View
- ❑ Imaging Staff
- ❑ Journal Create
- ❑ Security Assignment Add And Remove Security Group
- ❑ Security Assignment Add And Remove Security Role
- ❑ Valuable Type Edit

Note: There are multiple Security Groups that are not currently assigned to the Project Maintained Security Role for Help Desk Staff that will provide administrator level of access.

Employment Services Staff

- ❑ Assessment Re-evaluation Approval
- ❑ Assessment Results Detail Edit
- ❑ Authorized Representative Detail View
- ❑ Authorized Representative List View
- ❑ Call Log View
- ❑ Cal-Learn Non Compliance Detail View
- ❑ Cal-Learn Progress Detail View
- ❑ Cal-Learn Progress List View
- ❑ Case Flag Edit
- ❑ Create Address
- ❑ Customer Contact History View
- ❑ Demand Occupation List View
- ❑ Demographics Edit
- ❑ Eligibility View
- ❑ Eligibility Workload Inventory
- ❑ ES Customer Options List Edit
- ❑ ICT Summary View
- ❑ Imaging Capture
- ❑ Imaging Confidential Export
- ❑ Imaging Confidential Search
- ❑ Imaging Confidential View
- ❑ Imaging Copy
- ❑ Imaging County Exception
- ❑ Imaging County Person Select
- ❑ Imaging Export
- ❑ Imaging Global Application
- ❑ Imaging Office Capture

- Imaging Office Supervisor
- Imaging Search Case
- Imaging Search Person
- Message Center Notify
- Non Compliance Outreach Detail Add
- Non Compliance Outreach Detail View
- Non-Financial Edit
- Payment Requests Approve
- Program Edit
- Reception Log Edit
- Reports
- Time Limit Courtesy
- Valuable Request Create
- Workload Assignment View
- WTW Case Comments Report
- WTW Legacy Case Report

Supervisor Staff

- Activity Agreement Override
- Audit
- Authorized Representative Detail View
- Authorized Representative List View
- Authorized Representative Remove
- Authorized Representative Remove Program
- Bank View
- C4Y eApplication Activity Report
- C4Yourself Registration Edit
- Call Log Edit
- Call Log View
- Cal-Learn Caseload Characteristics Report
- Cal-Learn Non-Compliance Detail View
- Cal-Learn Progress Detail View
- Cal-Learn Progress List Remove
- Cal-Learn Progress List View
- Case Copy List Edit
- Case Flag Edit
- Case Flag List Remove
- Caseload Inventory Report Supervisor View
- Confidentiality Detail Edit
- Create Address
- Customer Contact History View
- Demand Occupation List View

- ❑ Demographics Edit
- ❑ EApp Case Link
- ❑ EApp Case Unlink
- ❑ EApp Decline
- ❑ EApp Edit
- ❑ EApp Edit Select
- ❑ EApp Worker Assignment
- ❑ EBT Account Manual Create
- ❑ EBT Card Add Manual
- ❑ Eligibility Reports
- ❑ Eligibility View
- ❑ Eligibility Workload Inventory
- ❑ Employment Services Status List Edit
- ❑ ES Customer Options List Edit
- ❑ Findings Edit
- ❑ Fiscal Search All Departments
- ❑ Flag View
- ❑ Get Next
- ❑ Good Cause Status Detail Edit
- ❑ ICT Summary Edit
- ❑ ICT Summary View
- ❑ ICT Transfer Edit
- ❑ ICT Unlink
- ❑ Imaging - Document Capture Report
- ❑ Imaging - Exception Queues Aging Report
- ❑ Imaging - Initial QA Report
- ❑ Imaging Auditing
- ❑ Imaging Capture
- ❑ Imaging Confidential Export
- ❑ Imaging Confidential Search
- ❑ Imaging Confidential View
- ❑ Imaging Copy
- ❑ Imaging County Capture
- ❑ Imaging County Exception
- ❑ Imaging County Person Select
- ❑ Imaging County Supervisor
- ❑ Imaging Document Remove
- ❑ Imaging Export
- ❑ Imaging Global Application
- ❑ Imaging Search Case
- ❑ Imaging Search Pers
- ❑ Journal Create
- ❑ Journal Suppress
- ❑ Lobby Management Reports

- ❑ MAGI EDBC Override
- ❑ MAGI Referral Unlink
- ❑ MC Negative Action Skip MAGI
- ❑ Message Center Notify
- ❑ Non Compliance Outreach Detail Add
- ❑ Non Compliance Outreach Detail View
- ❑ Non-Financial Edit
- ❑ Notes Edit
- ❑ Payment Requests Approve
- ❑ Program Assignment Reports
- ❑ Program Edit
- ❑ Quality Assurance
- ❑ Quality Assurance Reviewed Workload Inventory
- ❑ Quality Control Summation Report
- ❑ Quality Review Caseload Activity Report
- ❑ Quality Review Class Code Findings Report
- ❑ Quality Review Edit
- ❑ Quality Review View
- ❑ Reception Log Edit
- ❑ Recovery Account Special
- ❑ Release Note Report
- ❑ Reports
- ❑ Rescind Override
- ❑ Run Converted Retro EDBC
- ❑ Security Assignment Reset Password
- ❑ Skipped Issuance Report
- ❑ Special Investigations Referral
- ❑ Staff Management Report
- ❑ Targeted Low Income Detail Edit
- ❑ Targeted Low-Income Unlink
- ❑ Task Reassignment Edit
- ❑ Task Re-Open
- ❑ Task Type View
- ❑ Text Notification Repo
- ❑ Time Limit Courtesy
- ❑ Valuable Request Create
- ❑ Voice Print Edit
- ❑ Workload Assignment Edit
- ❑ Workload Assignment View
- ❑ WTW Case Comments Report
- ❑ WTW Legacy Case Report

Additional Security Role Checklist: Things to Consider

This list includes Job Functions that are not included in the current Project Maintained Security Roles. For each Job Function, a suggested list of Security Groups is provided.

Foster Care/AAP

Project Maintained Security Roles:

- ❑ Eligibility Staff
- ❑ RDB Supervisor

Possible **Security Groups** to include in **County Security Role**:

- ❑ AAP Placement Edit
- ❑ AAP Summary Edit
- ❑ Application Detail Active Edit
- ❑ Auxiliary Authorization Detail Approve L1
- ❑ Auxiliary Authorization Detail Edit
- ❑ Auxiliary Authorization Detail View
- ❑ Auxiliary Authorization List View
- ❑ CA 237 KG Report
- ❑ CA 237 KG-F LA
- ❑ Call Log Edit
- ❑ Case Copy List Edit
- ❑ Case Flag Edit
- ❑ CMSP
- ❑ Confidentiality Detail Edit
- ❑ Customer Contact History View
- ❑ DCFS Foster Care Income And Property Edit
- ❑ DCFS KinGap Placement Detail Edit
- ❑ EApp Case Link
- ❑ EApp Case Unlink
- ❑ EApp Decline
- ❑ EApp Edit Select
- ❑ EBT Card Add Manual
- ❑ EBT Card Unlock PIN
- ❑ Eligibility Reports
- ❑ Fiscal Search All Departments
- ❑ Foster Care Facility Edit
- ❑ Foster Care Payment Holds
- ❑ Foster Care Resource Edit
- ❑ Get Next

- ❑ Good Cause Detail Edit
- ❑ Good Cause Status Detail Edit
- ❑ ICT Summary Edit
- ❑ ICT Transfer Edit
- ❑ Imaging Adoptions Capture
- ❑ Imaging Adoptions Export
- ❑ Imaging Adoptions View
- ❑ Imaging Capture
- ❑ Imaging Confidential Export
- ❑ Imaging Confidential Search
- ❑ Imaging Confidential View
- ❑ Imaging Copy
- ❑ Imaging County Exception
- ❑ Imaging County Person Select
- ❑ Imaging Export
- ❑ Imaging Global Application
- ❑ Imaging Office Capture
- ❑ Imaging Office Supervisor
- ❑ Imaging RDB Capture
- ❑ Imaging RDB View
- ❑ Imaging Search Case
- ❑ Imaging Search Person
- ❑ Inter-Agency Transfer Summary View
- ❑ Journal Create
- ❑ Journal Suppress
- ❑ Kin-GAP Edit
- ❑ Kin-Gap Home Approval Edit
- ❑ Legacy Case List Edit
- ❑ License Edit
- ❑ License View
- ❑ MAGI Referral Unlink
- ❑ Main Payroll Foster Care Direct Deposit Reconciliation Report
- ❑ Main Payroll Foster Care Direct Deposit Summary
- ❑ Notes Edit
- ❑ Payment Requests Approve
- ❑ Payment Requests Edit
- ❑ Program Configuration Override
- ❑ Reception Log Edit
- ❑ Reports
- ❑ Skipped Issuance Report
- ❑ Targeted Low Income Detail Edit
- ❑ Targeted Low Income Person Detail View
- ❑ Targeted Low Income Search View
- ❑ Task Report

- Time Limit Courtesy
- Voice Print Edit
- Weekend Appointment Schedule
- Workload Assignment Edit
- Workload Assignment View
- WTW Case Comments Report
- WTW Legacy Case Report

GA/GR

Refer to Appendix H

Project Maintained Security Roles:

- Eligibility Staff

Possible **Security Groups** to include in **County Security Role**:

- Application Detail Active Edit
- Call Log Edit
- Case Copy List Edit
- Case Flag Edit
- CMSP
- Confidentiality Employee Relative View
- Customer Activity Edit
- Customer Contact History View
- EApp Case Link
- EApp Case Unlink
- EApp Decline
- EApp Edit Select
- EBT Card Add Manual
- EBT Card Unlock PIN
- Eligibility Reports
- Fiscal Search All Departments
- Flag View
- Get Next
- ICT Summary Edit
- ICT Transfer Edit
- Imaging Capture
- Imaging Confidential Export
- Imaging Confidential Search
- Imaging Confidential View
- Imaging Copy
- Imaging County Capture

- Imaging County Exception
- Imaging County Person Select
- Imaging County Supervisor
- Imaging Export
- Imaging Global Application
- Imaging Search Case
- Imaging Search Person
- Inter-Agency Transfer Summary View
- Journal Create
- Legacy Case List Edit
- MAGI Referral Unlink
- Notes Edit
- Payment Requests Edit
- Reception Log Edit
- Redeter Due Month Edit
- Reports
- Skipped Issuance Report
- Staggered Issuance Exemption Edit
- Targeted Low Income Detail View
- Targeted Low Income Person Detail View
- Targeted Low Income Search View
- Task Report
- Time Limit Courtesy
- Voice Print Edit
- Weekend Appointment Schedule
- Workload Assignment Edit
- Workload Assignment View
- WTW Case Comments Report
- WTW Legacy Case Report

Confidential Including Imaging

Project Maintained Security Roles:

- N/A

Possible **Security Groups** to include in **County Security Role**:

- Confidentiality Adoption Assistance View
- Confidentiality Domestic Abuse View
- Confidentiality Employee Relative View
- Confidentiality ER Reception Log View
- Confidentiality Foster Care View
- Confidentiality Minor Consent View

- Imaging Capture
- Imaging Confidential Export
- Imaging Confidential Reindex
- Imaging Confidential Reindex All
- Imaging Confidential Search
- Imaging Confidential View
- Imaging County Confidential Exception
- Imaging County Exception
- View Confidential Adoption Assistance
- View Confidential Domestic Abuse
- View Confidential Employee Relative
- View Confidential Foster Care
- View Confidential Minor Consent
- View Reception log information for Employee/Employee Relative confidential cases

Imaging

Project Maintained Security Roles:

- N/A

Possible **Security Groups** to include in **County Security Role**:

- Customer Reporting View
- Imaging - Document Capture Report
- Imaging - Exception Queues Aging Report
- Imaging - Initial QA Report
- Imaging Adoptions Capture
- Imaging Adoptions Export
- Imaging Adoptions View
- Imaging Auditing
- Imaging Capture
- Imaging Confidential Export
- Imaging Confidential Search
- Imaging Confidential Search
- Imaging Confidential View
- Imaging Copy
- Imaging County Capture
- Imaging County Exception
- Imaging County Person Select
- Imaging County Supervisor
- Imaging Document Remove
- Imaging Export

- ❑ Imaging Global Application
- ❑ Imaging Office Capture
- ❑ Imaging Office Supervisor
- ❑ Imaging RDB Capture
- ❑ Imaging RDB View
- ❑ Imaging Search Case
- ❑ Imaging Search Person

Appendix

Appendix E – Unassigned Security Groups

Appendix F – CalSAWS Page Mapping Matrix

Appendix G – CalSAWS Security Navigation

Appendix H – CalSAWS GAGR Page Security Rights