Lunch Break!

We'll resume at 1:30 PM

Breakout Session 2
Improving Efficiency Using Task Management and GetNext Functionality

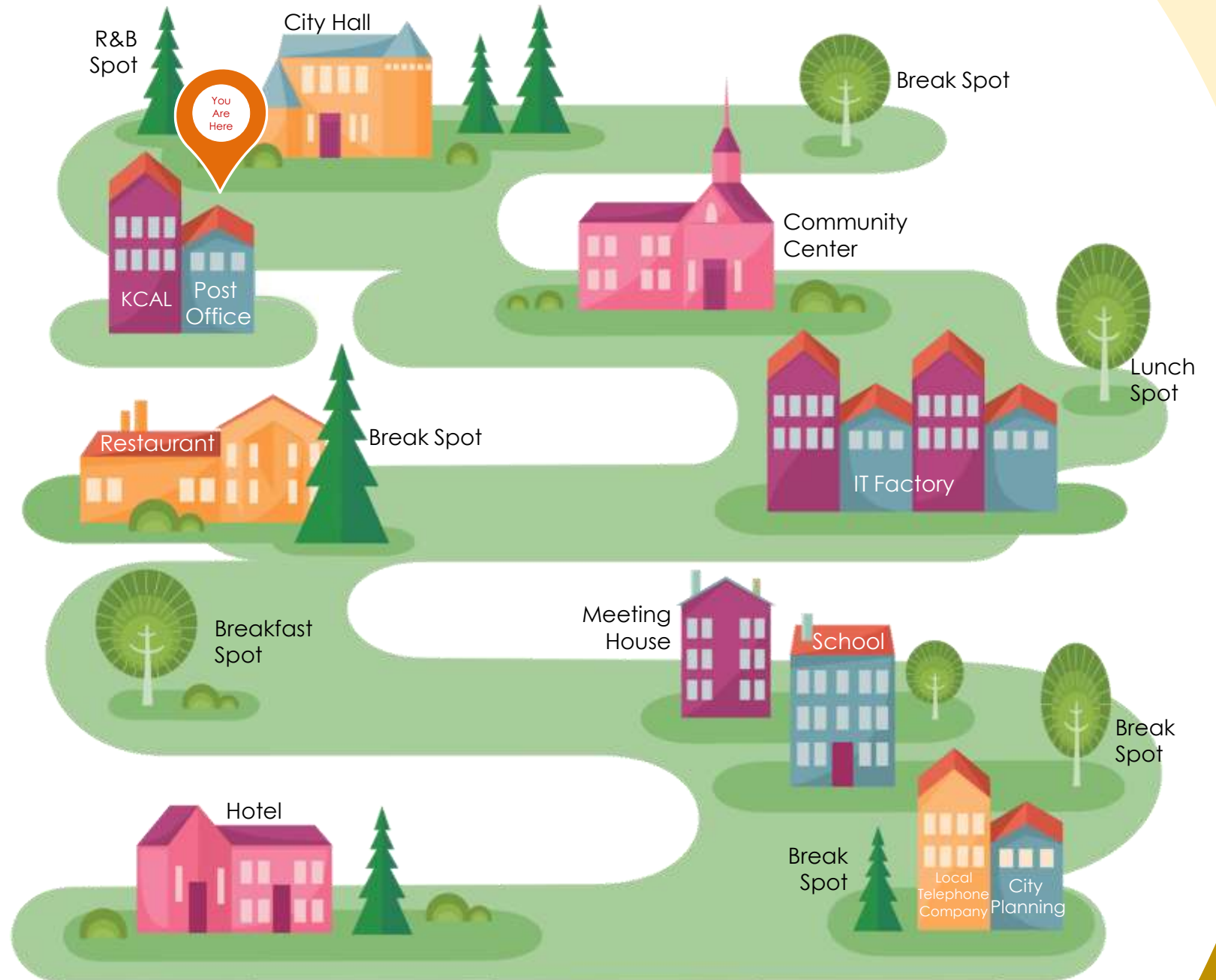# Welcome to the Post Office!

Cultivating CalSAWS Community

R&B Spot

City Hall

You Are Here

Break Spot

Community Center

KCAL

Post Office

Restaurant

Break Spot

Lunch Spot

IT Factory

Breakfast Spot

Meeting House

School

Break Spot

Hotel

Break Spot

Local Telephone Company

City Planning

Task Management and GetNext Functionality
Welcome to Our Post Office!

We'll hear about…

- What is CalSAWS Task Management

- 2023 Task Management Changes

- 2024 Task Management Changes

- Task Banks & Get Next Feature

- Document Routing

- Task Append Feature

- Task Reassignment

- Task Management Dashboard

- Preview of Workload Assignment effort

Welcome to Task Management
Video Demo

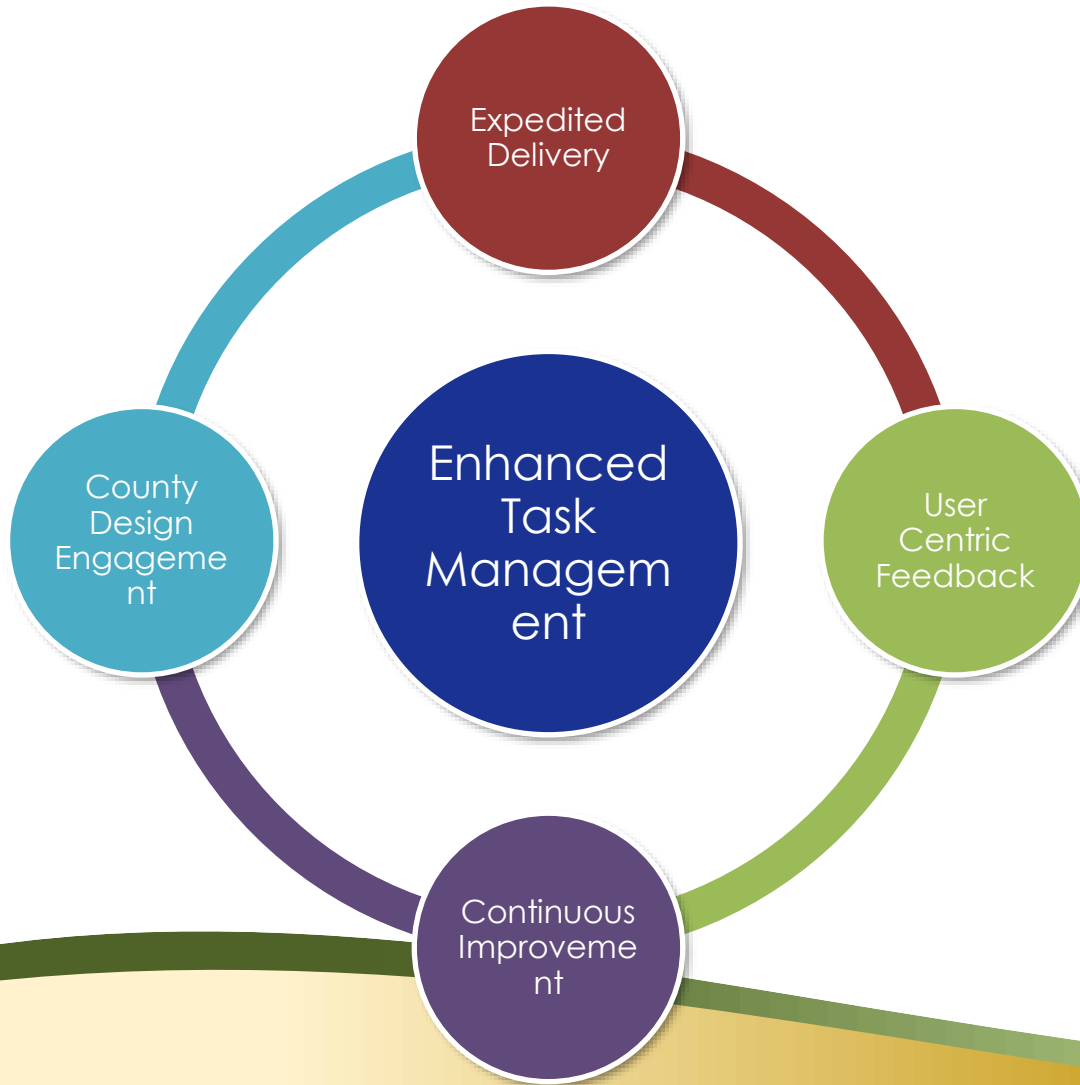# 2023 Task Management Changes
Background

- Counties expressed a desire to enhance the CalSAWS task features to align with changes to their business processes
- Opportunities for enhanced metrics and task reporting were identified to aid counties in task administration

- Los Angeles and Kern Counties submitted CalSAWS Enhancement Requests (CERs) in late 2022 to update CalSAWS to support their enhanced business

- CalSAWS allocated funds for FY 22-23 and FY 23-24 to support enhancements to the task management solution

- Work was broken into two phases to align with fiscal years

- An expedited design and delivery approach was leveraged to maximize the features being added in each phase

2023 Task Management Changes
Highlights

Enhanced Task Management

- Expedited Delivery
- User Centric Feedback
- Continuous Improvement
- County Design Engagement

Hybrid/Agile Approach

- Utilizes smaller, more frequently meeting workgroups. Workgroups create user stories about how the functionality will work and approves designs.

- Build smaller pieces and deliver faster. Allows for pivoting in direction as needed. Still utilizes the bi-monthly for county validation.

- Workgroup report outs to Committee members and SMEs throughout the design and delivery process.

- There is an on-going goal of continuous improvement as we continue to utilize this approach.

2023 Task Management Changes
Phase 1 - Summary

Release 1 – March 23, 2023 — CA-255938 - Automated Actions for Expedited Service and Immediate Need

Release 2 – May 11, 2023 — CA-253348 - Track Time Spent Working Task

Release 3 – May 25, 2023 — CA-253604 - Update Dashboard for Task Management - Part 1

Release 4 – June 22, 2023 —
CA-253349 - Get Next Prioritization Configurability

CA-253347 - Enhance Homepage to Include Additional Task Information

CA-253605 - Update Dashboard for Task Management - Part 2

2024 Task Management Changes

CA-253667
Configurable Task Categories (24.05)

- Create a Task Category List and Detail page to facilitate creating custom Task Categories by county

- Update CalSAWS online pages and processing logic that is reliant on Task Categories to be based on the county custom Task Categories instead of the existing static Task Categories

CA-263040
Task Admin functionality for Task mass closure (24.05)

- Update the Task Upload pages and processing functionality to include a Closure Template that will support mass task closures

- Display the Task ID on the Task Export Template and Task Detail page to support mass task closures

Task Banks & Get Next Features

Cultivating CalSAWS Community

CalSAWS Task Management
Task Feature – Get Next

Get Next

Counties can assign tasks to a bank, which allows the User to pull tasks into their queue by clicking the **Get Next** button

Get Next

Based on county configurations, the **Get Next** button assigns the next available task according to the Users profile

Minimizes the need for users to manually search for tasks!

CalSAWS Task Management
Task Feature – Get Next

Workers are associated to Task Banks in one of two ways:

Automatically via the Bank Office and Unit

By Direct Association

Task Bank 1

Office: 10
Unit: YY
Associate All Office/Unit Positions: Yes

| Worker 10YY01 | Worker 10YY02 | Worker 10YY03 |

Additional Associations: None
Excluded Associations: None

Task Bank 2

Office: 10
Unit: YY
Associate All Office/Unit Positions: No

Additional Associations:

Worker 10YY01

Excluded Associations: None

CalSAWS Task Management
Task Feature – Get Next

Get Next Processing Requires:

✓ <u>One or more</u> Task Banks to be available

✓ The worker to be associated to <u>one or more</u> Task Banks

✓ Task Bank(s) to include Tasks that the worker's position is configured to receive

GetNext Features
Video Demo

CalSAWS

📖 Journal ✓ Tasks ❓ Help 📋 Resources 📑 Page Mapping 🖼 Imaging 📊 Log Out

Contra Costa SIT	Case Info	Eligibility	Empl. Services	Child Care	Resource Databank	Fiscal	Special Units	Reports	Client Corresp.	Admin Tools

Welcome, Dymas Penal   **Tuesday, October 03, 2023**

Worker ID:
07AS00FB6Q

Case Number:
[   ] Submit

▾ Announcements	Type	Date
Release 23.09.07-Release Notes	CalSAWS	
Release Note Report	CalSAWS	
CalSAWS Project Announcement: Due to upcoming CalWIN migration cutover activities, the CalSAWS team advises counties to avoid scheduling customer appointments late in the day on Friday, October 27th through early Monday morning, October 30th.	CalSAWS	09/05/2023

▾ Quick Links

Reception Log
Reminders
County Calendar

▸ My Tasks

▸ My Schedule

▸ My New Assignments

▸ My Reminders   **Due Date**

Contra Costa County

▾ Business Intelligence

DPSSTATS Data Warehouse Homepage

Chat

Let's hear from

Ignacio de la Cruz
Merced County

on their Task Management efforts

CalSAWS Task Management
County Task Banks/Get Next - Merced

- **What was needed**

  - Need for more flexibility

  - Decreased workforce/Increased work

  - Provide support/relief to eligibility staff who could no longer effectively manage the rapidly growing CalFresh caseload.

  - Expedite training of new staff by focusing on tasks

- **How we did it**

  - Implementing with CalFresh/Medi-Cal cases only

  - Included staff in decision making to garner their buy in/support

  - Banked all CalFresh/Medi-Cal cases countywide

  - Combination of pushing and pulling tasks

CalSAWS Task Management
Task Banks/Get Next – Merced

- **Monitoring**
  - Plan for the number of staff needed to vary from month-to-month based on workload demands; SAR 7, RC, etc.

  - Rotating duties – frequency?

  - Frequent meetings with supervisors and lead workers to develop policies

  - Reports are crucial to identify when resources need to shift. CalSAWS reports used:
    - ✦ Task Report
    - ✦ Task Completion Report

CalSAWS Task Management
Task Banks/Get Next – Merced – Task Report

| Task Report | Provides a listing of Open, In Process, Cleared, Voided and Expired Tasks as well as Tasks that are overdue. Tasks will be classified as Open, In Process, Cleared, Voided or Expired as of the End Date that is specified on the Enter Report Parameters page. |

CalSAWS Task Management
Task Banks/Get Next – Merced – Task Completion Report

Task Completion Report	Provides a listing of Tasks that have been cleared or voided over a specified date range. Details include Clearing/Voiding Worker, Assigned Worker, Type, Sub-Type, and Task duration in days.

Summary

Worker Name	Total	Days to Assign	Days to Clear/Void/Complete	Total Days
	4	16	2	18
	10	44	7	63
	20	33	2	33
	8	0	7	7
	13	1	4	8
	20	0	7	31
	17	0	5	21

Let's hear from

Adrianna Kessler &
Veronique Hayes

Kern County

on their Task Management efforts

CalSAWS Task Management
Task Banks/Get Next (Kern)

- **What was needed**

  - To build staffing capacity for Intake and Ongoing CalWORKs due to high workload and vacancy rates, we implemented task banks for Appointments, SAR7s and Finishing Tasks

- **How we did it**

  - Created task banks for:

    - ✦ Intake Application/Appointments

    - ✦ SAR7s and

    - ✦ Finishing Tasks for Intake/Ongoing

  - Staff pull tasks using "Get Next" functionality

CalSAWS Task Management
Workarounds Developed (Kern)

Created Task Category Chart

Task Category	Task Name	Criticality
EBT	IN CW Application - English -	Critical
Foster Care RDB	IN CW Application - Spanish	Critical
Fraud	ES Application - English -	High
IEVS	ES Application - Spanish	High
Fraud	CF / MC Application - English - Regular Processing	Medium
IEVS	CF / MC Application - Spanish - Regular Processing	Medium
IEVS Criminal	GA Application - English - Regular Processing	Medium
IEVS Priority	GA Application - Spanish - Regular Processing	Medium
EBT	CW Application - English - Regular Processing	Medium
Foster Care RDB	CW Application - Spanish - Regular Processing	Medium

Task Search

@Help

* - Indicates required fields

▶ Refine Your Search

Search Results Summary									Results 1 - 6 of 6

Add Task

		Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Worker ID	Bank ID	Date Appended		
☐	🔴 ◈	12/07/2023				IEVS	CF / MC Application - Spanish - Regular Processing	Assigned	15LS02D506	15LS02D50JBK		Complete	Edit

CalSAWS Task Management
Workarounds Developed (Kern)

- On the Task Type Detail Page in CalSAWS, Priority is set so the more critical tasks are pulled from the task bank first

- For example, Immediate Need and Expedited applications automatically rise to the top of the applications task bank because they are given the highest priority of Critical

Task Type Detail

✳- Indicates required fields   Close

Task Type Information

Name: ✳	Category: ✳	Priority:
CF / MC Paper Application - Same Day	Fraud	Critical
Available Online:	**Available for Automation:**	
No	No	

CalSAWS Task Management
Appointment Task Banks (Kern)

- Appointments are scheduled to a ghost worker ID in CalSAWS

- When an appointment is scheduled in CalSAWS, the worker has to use the "Location" field on the Customer Schedule page to identify the type of appointment and language being scheduled (CW, CF, MC, GA)

- This information is included in a report that is then uploaded on the Task Upload page in CalSAWS

IMPORTANT: If scheduling a **PHONE** appointment in CalSAWS:
- Use the correct Category and Appointment Type for Intake,
- Update the **"Location"** based on the type of application as follows:

Type of App	English or Other Lang	Spanish
General Assistance	GA	SPN GA
CalWORKs	CW	SPN CW
CalFresh	CF	SPN CF
Medi-Cal	MC	SPN MC

More than one program: List the Cash Progam 1st

General Information

Category: * [- Select -]   Appointment-Type: * [Telephone Interview Intake]

Office: [Delano] [Select]

Location: * [SPN CW/CF]

General Information

Category: * [- Select -]   Status: * [- Select -]

Office: [Kern County Human Services] [Select]

Location: * [SPN CF/MC]

CalSAWS Task Management
Task Upload (Kern)

- An Appointment Excel report is sent to Workflow Coordinators by our Data Analysis team each day listing all the appointments for the day

- The Workflow Coordinators upload the appointment template into CalSAWS, which puts appointment tasks in the task banks based on appointment type and language

CalSAWS Task Management
Uploading Appointments in Intervals (Kern)

- Appointments are uploaded at intervals throughout the day

- Allows the Supervisor to monitor flow of work in the task banks

- Uploading in intervals ensures 8:00 appointments are completed before 10:00 appointments are uploaded

CalSAWS Task Management
Flexible Appointment Scheduling (Kern)

- Appointment workers use "Get Next" to pull appointment tasks then contact the customer to complete the scheduled interview.

- Appointments are scheduled in 2-hour blocks of time.

- The 2-hour time block method allows flexibility for when the customer can reasonably expect a phone call.

CalSAWS Task Management
Additional GetNext functionality (Kern)

- **SAR7s**
  - Each day, SAR7s in "Received" status are uploaded to task banks
  - Staff pull the tasks and process the work using GetNext
  - Staff like having the ability to pull work rather than waiting for assignment from Supervisor

- **Finishing Tasks**
  - Applications/Renewals that are not dispositioned during the interview are assigned to a finisher caseload
  - Tasks are manually set by Appointment Worker for the due date of application/renewal or the due date of pending information
  - Finishing staff pull the tasks using GetNext and process work and clear tasks

CalSAWS Task Management
Additional Get Next functionality (Kern)

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  - Each day, SAR7s in received status are uploaded to task banks
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  - Finishing staff pull the tasks using Get Next and process work and clear tasks

Let's hear from

Artin Sahakian &
Sergio Andrade
Los Angeles County

on their Task Management efforts

CalSAWS Task Management
Task Management (Los Angeles)

- **What was needed**

  - Manage unit caseload tasks.
  - Process time sensitive tasks such as Renewals and Periodic Reports in a timely manner.
  - Shared office level tasks (e.g., SAR7, Applications, Renewals).
  - Shared Department level tasks (e.g., GEN201/202 Employment verification).

- **How we did it**

  - Created Office level and Department level task Banks.
  - Created SAR7 and MRT units to process SAR7s and MC Renewals for the entire office.
  - Routed tasks to the unit Ghost IDs or Office level Bank.

CalSAWS Task Management
Task Feature Get Next (Los Angeles)

- **Assess Workload / Productivity**
  - Easily access awaiting tasks
  - Easily preview the number of tasks assigned/completed by office/unit/worker
  - Forecasting tools needed for management to position staff appropriately

- **How we did it:**
  - Supervisors distribute tasks from Unit Ghost ID / Office Banks to the workers
  - Workers search their unit's tasks based on priorities set by the supervisor and assign the task to themselves to process
  - Using CalSAWS reports to monitor completed and pending tasks for unit/office and assess the future needs for managing the workload

Document Routing & Task Append

Cultivating CalSAWS Community

Breakout Session 2

CalSAWS Task Management
Task Feature – Document Routing Rules

Document Routing Rules

✓ Created for documents scanned into the system

✓ Automatically identified

✓ Generate tasks based on each county's rules

The Right Documents
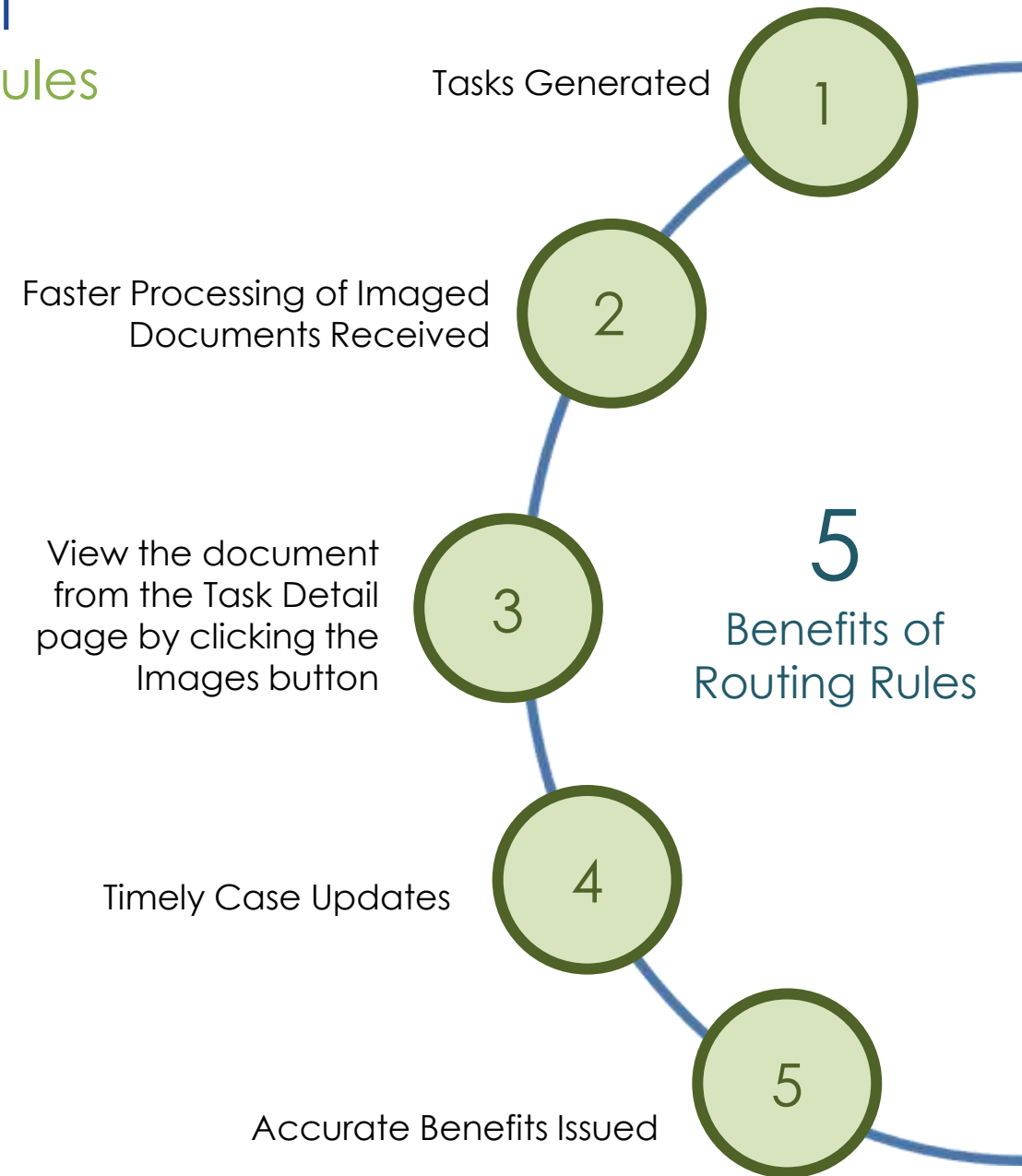
To The Right People

At The Right Time

CalSAWS Task Management
Task Feature – Document Routing Rules

Linking BenefitsCal and Other Images to Tasks

When the county opts to set up document routing rules:

✓ A task can generate when a document is imaged and fully indexed.

✓ You can view the image that triggered a task from within the context of a task.

Tasks Generated — **1**

Faster Processing of Imaged Documents Received — **2**

View the document from the Task Detail page by clicking the Images button — **3**

5
Benefits of Routing Rules

Timely Case Updates — **4**

Accurate Benefits Issued — **5**

Document Routing Rules
Video Demo

CalSAWS

San Bernardino
SYS1

Case Info | Eligibility | Empl. Services | Child Care | Resource Databank | Fiscal | Special Units | Reports | Client Corresp. | **Admin Tools**

Admin

- Flag
- County Announcement
- County Authorizations
- County Benefit Issuance Thresholds
- County Security Roles
- Disaster Services
- **▼ Automated Actions**
  - Document Routing
  - MEDS Alert Admin
  - Task Admin
- Audit
- Non-County Staff
- Correspondence
- Campaign
- Emergency Text
- **▼ Tasks**
  - Task Settings
  - Task Reassignment
  - Task Types
  - Task Upload
- Referral Assignments
- **▼ GA/GR County Admin**
  - Rules
  - Fiscal
  - Grants/Income
  - Appointment
  - Correspondence
  - Non-Compliance/Sanction

Document Routing Rule List

▸ Refine Your Search

Search Results Summary	Results 1 - 25 of 28

1 2 Next

Add Document Routing Rule

☑ Name	Forms	Status	
Customer Report Received: ABD MC RE Packet	ABD MC RE Packet - Legacy: ABD MC RE Packet	Active	Edit
Customer Report Received: CCRR	CCRR 100 CIV - Legacy: Child Care Reimbursement Request, CSF 141: Child Care Reimbursement	Active	Edit
Customer Report Received: CF RE Packet	CF RE Packet - Legacy: CalFresh Recertification Packet, CF RE Packet: CalFresh Recertification Packet	Active	Edit
Customer Report Received: CW/CF RE Packet	CW/CF RE Packet - Legacy: CalWORKs/CalFresh RE Packet, CW/CF RE Packet: CalWORKs/CalFresh RE Packet	Inactive	Edit
Customer Report Received: LTC MC RE Packet	LTC MC RE Packet - Legacy: LTC MC RE Packet	Active	Edit
Customer Report Received: MAGI RE Packet	MAGI RE Packet - Legacy: MAGI RE Packet, MAGI RE Packet: MAGI RE Packet	Active	Edit
Customer Report Received: MC RE Packet	MC RE Packet - Legacy: MC RE Packet, MC RE/ABD RE Packet - Legacy: MC RE/ABD RE Packet, Non-MAGI RE Packet: Non-MAGI RE Packet	Active	Edit
Customer Report Received: Mixed MC RE Packet	Mixed Household RE Packet: Mixed Household RE Packet, Mixed MC RE Packet - Legacy: Mixed MC RE Packet	Active	Edit
Customer Report Received: Non-MAGI Packet	Non-MAGI Screening Packet - Legacy: Non-MAGI Screening Packet, Non-MAGI Scrn Pkt: Non-MAGI Screening Packet	Active	Edit
Customer Report Received: SAR 7	SAR 7 Addendum/SAR 2/SAR 7: Eligibility Status Report Packet, SAR 7/SAR 2 - Legacy: SAR/Reporting Changes For Cash Aid/CF	Active	Edit
Customer Report Received: TMC 176 S	MC 176 TMC - Legacy: Transitional MC Quarterly Status Report, MC 176 TMC: Transitional MC Quarterly Status Report	Active	Edit
Customer Report Received: WTW 733.4	CSF 124: WTW Program Attendance/Progress Report, WTW 733.4 - Legacy: WTW Program Attendance and Progress Rpt	Active	Edit
Customer Report Received: WTW 735.2	CSF 125: Welfare-to-Work School Attendance Report, WTW 735... Legacy: WTW School Attendance Report	Active	Edit
Customer Report Received:	CSF 126: Travel Assistance Claim, WTW 753A - Legacy: Travel		Edit

Save And Return

Task Append feature allows counties to add additional information to the Task Long Description of an existing task rather than create a new task.

Append is configured in the Append Information panel for a Task Type/Task Sub-Type:

CalSAWS Task Management
Task Append (Merced)

Append Rules were created to route documents for incomplete periodic reports to the worker processing the periodic report

Task Type Detail

✱ - Indicates required fields   [Save and Return] [Cancel]

Task Type Information

Name: ✱	Category: ✱	Priority:
Images Awaiting Review	Legacy ▾	Medium ▾

Available Online: ☑   **Available for Automation:** ☑

Instructions:

Expire Tasks: ✱	Expiration Period: ✱	Expiration Type: ✱
Yes ▾	365 day(s)	After Program Closes ▾

Newly Assigned Indicator: ✱

Tasks display indicator for 5 day(s)

▾ **Sub-Type Information**

☐	Name	Available Online	Available for Automation	Priority	Task Expiration	
☐	TNB 4 Recertification Packet	No	Yes	High		[Edit]

[Remove]   [Add]

▾ **Append Information**

☐	Task Type	Task Sub-Type
☐	RD/RC Incomplete	
☐	MCRE Incomplete	
☐	TNB RC Incomplete	
☐	SAR 7 Incomplete	

CalSAWS Task Management
Task Append (Merced)

Workers manually create finishing tasks and assign the task to themselves

Workers can identify which cases have provided verifications by seeing that there is an Append date

CalSAWS Task Management
Document Routing Rules, Append & Reassignment (Los Angeles)
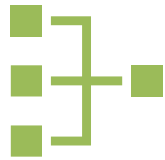
Document Routing Used when a new image types are ingested into Hyland:

- Define the program(s) impacted
- Define task assignment (Worker/Bank)

Task Append Feature Used Task Type "Images Received" to reduce task volume
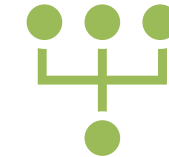
Task Reassignment Used for Applications/ Renewals and Periodic Reports. Tasks are reassigned to Banks instead of worker

Used for some CW tasks to reassign to WTW/GAIN workers.

Cultivating CalSAWS Community

Real-Time Task Management Dashboard

Breakout Session 2

CalSAWS Task Management
Task Feature – Real Time Dashboards

Task Management Real Time Dashboard

✓ Provides an interactive display of charts, tables, and graphics that allows the county/user to view and navigate to desired information

✓ Allows filtering capabilities for individualized views that can be modified to change the displayed information based on the county needs

CalSAWS Task Management
Task Feature - Dashboards

Task Status
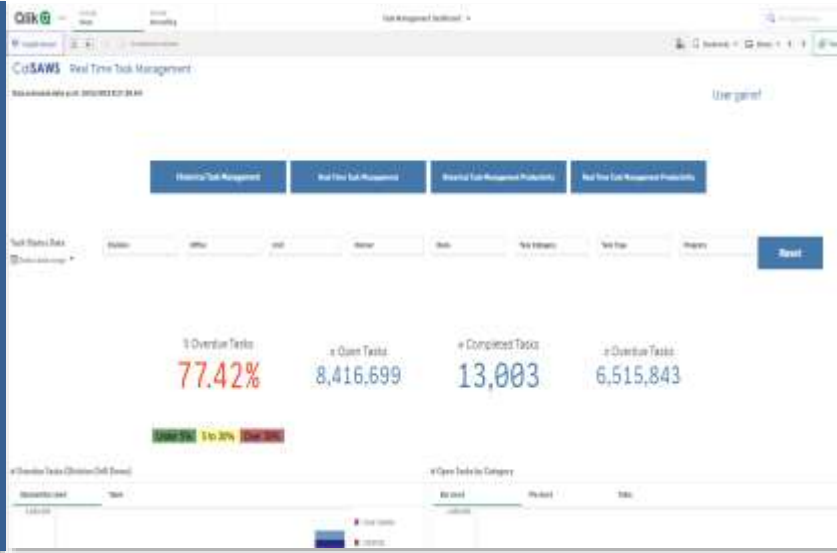
Completed Tasks

Overdue/Open Tasks
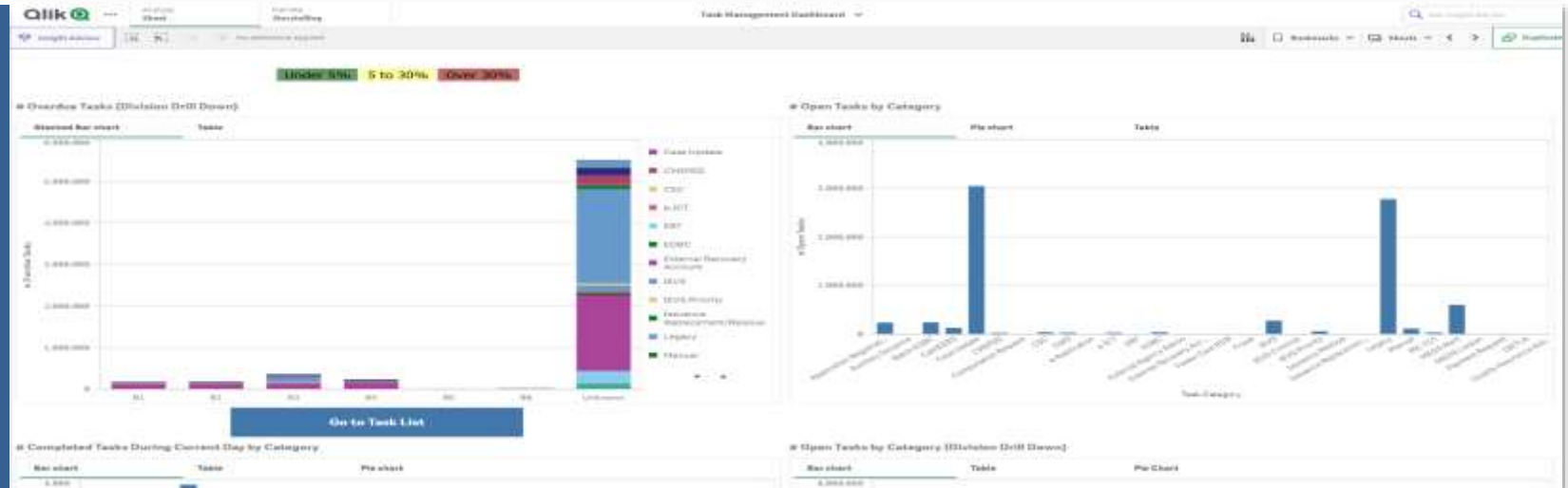
Task Dashboard Feature
Video Demo

CalSAWS

Journal | Tasks | Help | Resources | Page Mapping | Imaging | Log Out

Contra Costa
SYS4

Case Info | Eligibility | Empl. Services | Child Care | Resource Databank | Fiscal | Special Units | **Reports** | Client Corresp. | Admin Tools

Business Intelligence

Scorecards

DPSSSTATS

Reception Log

Statistical Summary Analysis

Real Time Task Management

Operations Reports

Child Welfare Programs STATS

BenefitsCal

Report Search

▶ Refine Your Search

Search Results Summary	Results 1 - 1 of 1
Title	**Category**
▽	▽
Real Time Task Management	Task Management

This Type 1 page took 0.29 seconds to load.

Workload Management

Intake Assignment and Appointment Scheduling
Requirements Gathering Approach

Cultivating CalSAWS Community

Enhancing Intake Assignment and Appointment Scheduling

The assignment of workers during intake is critical to the timely processing of applications.

Many counties are **leveraging tools outside of the system** to align to their processes, such as:

- Manual individual/bulk reassignment
- Ghost workers
- Periodic rebalancing through batch

Intake Assignment Feedback

- **Limits worker selection** to single office
- Should account for **worker schedule**
- Integration with **Flexible Appointments**
- **Difficult to track** and set concurrent capacity
- Need **more reports** and **metrics**
- More **automatic assignment** options needed
- Better aligned to **banked/task-based work**
- Usability of worker schedule and availability

Addressing Unique Needs with Human Centered Design

County Needs

Maintainable

Usable
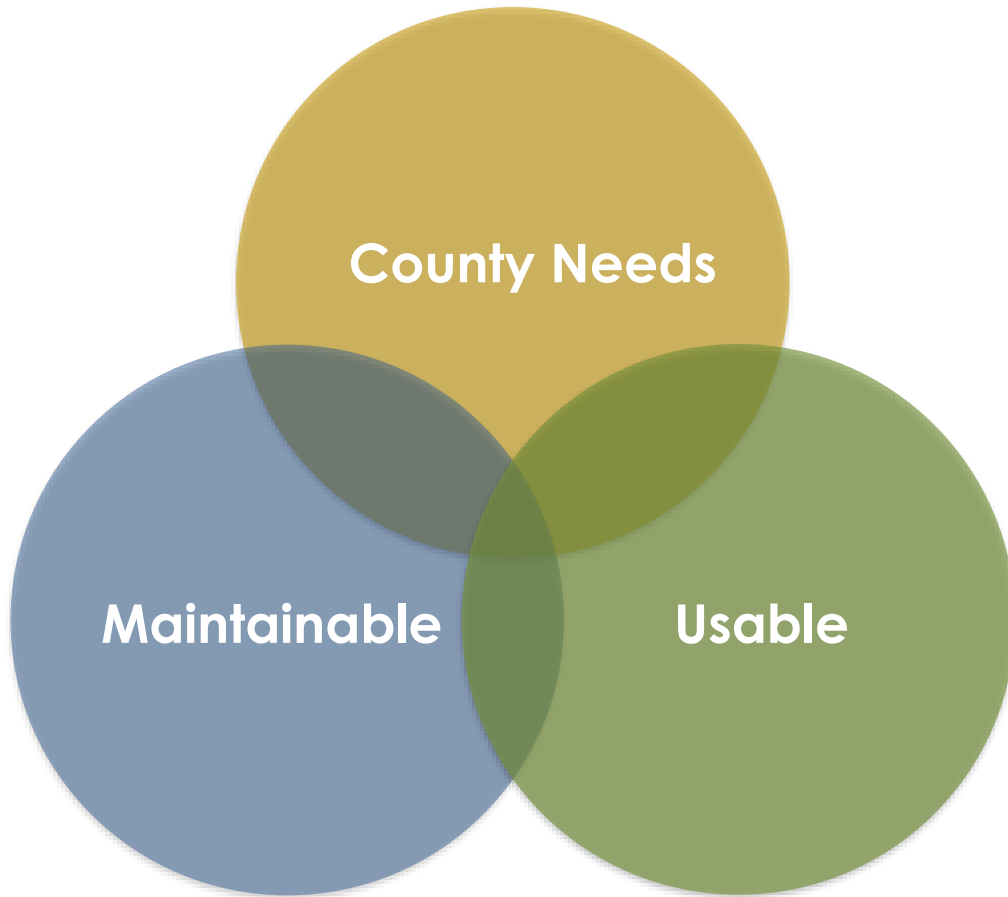
The process of intake assignment and appointment scheduling is part of **county workload management**. This is a unique area in CalSAWS that **requires flexibility and configurability** to align to unique county business processes.

Leveraging **Human-centered design** will allow us to hear county needs to develop requirements for a highly usable and maintainable solution.
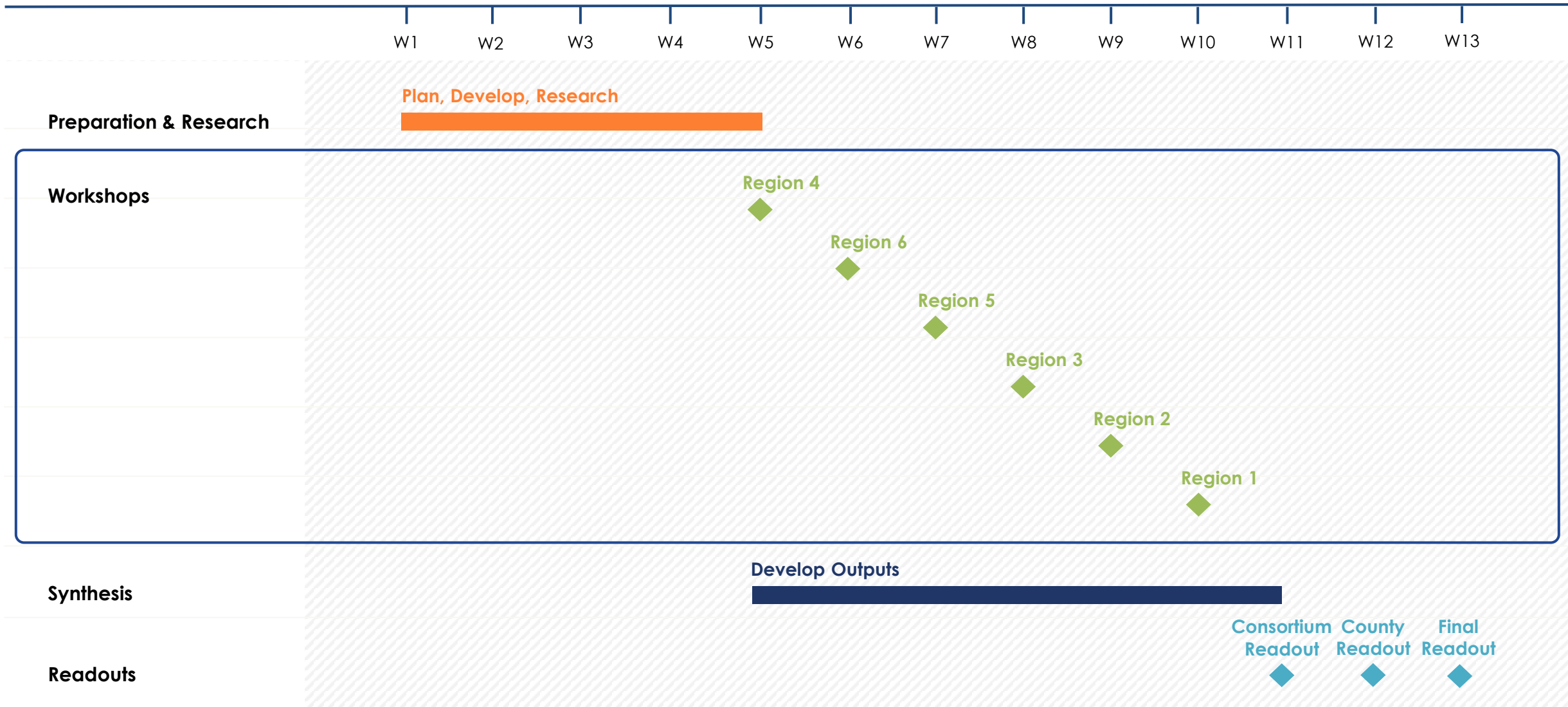
Human-centered design will take into consideration impacts to external applications like BenefitsCal.

Caseload Assignment Requirements Gathering Approach

Use this five-step approach for developing the strongest recommendations

1
Preparation

2
Research

3
Workshops

4
Synthesis

5
Readouts

3-month Project Timeline

	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13

Preparation & Research

Plan, Develop, Research

Workshops

Region 4

Region 6

Region 5

Region 3

Region 2

Region 1

Synthesis

Develop Outputs

Readouts

Consortium Readout   County Readout   Final Readout

Any Questions on Task Management or GetNext Functionality?

Q&A

Let's Take a Break!

We'll resume at 3:15 PM

The Neighborhood Parks are lovely this time of year!