

CalSAWS | Enhancement Request (CER)

PPOCs: Please send the completed request to CER@CalSAWS.org and cc your RM.

Submission Date	10/19/2023
Title	Auto Scheduling of RE appointments

Region #: 4	County Name: Merced	
Submitter: Michelle Smith	Email: michelle.smith2@countyofmerced.com	Phone: (209)385-3000 ext. 5262

Program(s) Impacted:			
<input type="checkbox"/> Adoptive Services	<input type="checkbox"/> ARC	<input checked="" type="checkbox"/> CalFresh	<input type="checkbox"/> Cal-Learn
<input checked="" type="checkbox"/> CalWORKS / RCA	<input type="checkbox"/> CAPI	<input type="checkbox"/> Child Care	<input type="checkbox"/> CMSP
<input type="checkbox"/> Foster Care	<input type="checkbox"/> GA/GR	<input type="checkbox"/> GAIN/REP/WTW	<input type="checkbox"/> GROW
<input type="checkbox"/> Kin-GAP	<input type="checkbox"/> Medi-Cal / RMA	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Other – specify			

Area(s) Impacted:			
<input type="checkbox"/> Call Center	<input type="checkbox"/> Case Assignment	<input type="checkbox"/> Central Print	<input type="checkbox"/> Client Correspondence
<input type="checkbox"/> Eligibility	<input type="checkbox"/> Fiscal / Collections	<input type="checkbox"/> Hearings	<input type="checkbox"/> Imaging
<input type="checkbox"/> Lobby Management	<input type="checkbox"/> Reports	<input type="checkbox"/> Resource Data Bank	<input checked="" type="checkbox"/> Schedule Appt
<input type="checkbox"/> Security	<input type="checkbox"/> Self Service Portal	<input type="checkbox"/> Special Investigation	<input type="checkbox"/> Task Mgmt
<input type="checkbox"/> Time Limits	<input type="checkbox"/> Training		
<input type="checkbox"/> Interface(s) - specify			
<input type="checkbox"/> County Operational (ex. Business Reply Mail (BRM), EBT Printers, Change of Address, Opt In/Out, etc.) – specify			

CalSAWS | Enhancement Request (CER)

Other – specify

Justification / Request Summary:

Issue:

1. The batch job begins scheduling appointments the first of the RE Due Month. In Merced County, workers begin seeing appointments the day after NOA 10-day in the month prior to the RE Due Month. So, appointments for the day after NOA 10-day to the end of the month prior to the RE Due Month, must still be scheduled manually.
2. Batch uses 10-day NOA cutoff logic, and then goes back an additional 2 business days to find the final day of the RE month for which appointments will be scheduled. Example: December RE Due Month – 10-day NOA cutoff is 12/21/2023, and 2 business days prior is 12/19/2023. Batch will schedule appointments from 12/1/2023 – 12/19/2023.
3. When a recipient is opted in to IVR notification, the batch is not checking the 'Outbound IVR Call' checkbox on the "Customer Appointment Detail" page.
4. Merced County banks their CF cases. In order for appointments to be scheduled to specific workers, for specific time slots, we have to transfer the banked cases out to specific workers prior to the batch run.

CalSAWS | Enhancement Request (CER)

Proposed Recommendation:

1. Have the batch begin scheduling appointments for the day after NOA 10-day in the month prior to the RE Due Month, provided worker availability is entered for this timeframe. The batch should also skip scheduling an appointment for any case that has an appointment during this timeframe.
2. Have batch schedule appointments through 10-day NOA cutoff. Example: : December RE Due Month – 10-day NOA cutoff is 12/21/2023. Batch will schedule appointments from 12/1/2023 – 12/21/2023.
3. When a recipient has opted in to IVR notification, the batch should check the ‘Outbound IVR Call’ checkbox when scheduling the appointment.

Category: * General Appointment	Appointment-Type: * Telephone Interview Recertification	Status: * Scheduled	Status Reason: * Batch Initiated
<input checked="" type="checkbox"/> Flexible Block Appointment		Initiate Call: * Worker	
Phone Number: * (855)421-6770		Extension: 	
Office: HSA Main Campus	<input type="button" value="Select"/>		
Location: * 2115 WARDROBE AVE MERCED CA 95341			
Appointment Letter Comments: <input type="text"/>		Appointment Comments: <input type="text"/>	
<input type="checkbox"/> Print Appointment Letter			
<input checked="" type="checkbox"/> Outbound IVR Call		Recipient: * Perez, Sophia 39F	

4. We would like to be able to somewhere in the system, possibly Position Detail page, tell the system “for worker XXXX, pull cases from worker XXXX (banked caseload) and schedule appointments with a specific worker. This way we could set up a set number of workers to have appointments scheduled from the banked caseload without having to transfer the cases.

Priority/Implementation Consideration(s):

CalSAWS Response:

CalSAWS | Enhancement Request (CER)

CER Tracking #: (automatically generate by JIRA)	SCR #
Rejected By:	Date:
Rejection Reason(s) or other Comments:	