

[CA-270668] Task Reassignment Bundling Enhancement

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Status:	In Progress
Project:	CalSAWS
Component/s:	None
Fix Version/s:	None

Type:	CER	Assignee:	Sarah Rich
Reporter:	Frederick Gains		
Labels:	None		

<i>Main</i>	
Region #:	4
County:	Fresno
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Programs Impacted:	CalFresh, CalWORKs, GA - Managed, General Relief, Medi-Cal/MSP/CMSP
Request:	Fresno requires the ability of Task Management to bundle tasks together with the same case number during Task Reassignment Processes. With case bundling turned off, cases with multiple tasks get reassigned to separate workers. When case bundling is turned on, tasks (not queued up from source worker/bank) already assigned to a worker get reassigned during Task Reassignment.
Recommendation:	Add ability to configure Case Bundling to exclude tasks that are not assigned to source Worker and/ or Task Bank ID's listed in Reassignment Rule. Tasks not assigned to source Worker ID's or Task Banks would not be pulled into reassignment rule as part of this requested Enhancement. This would be a configurable setting that would not change current case bundling functionality. Example: <ul style="list-style-type: none"> • Reassignment Rule setup with source Workers A, B, and C. • Reassignment Rule setup with destination Workers X, Y, Z. • Case XXXXXXXX has 2 tasks assigned to Worker A, 3 tasks assigned to Worker C, and 1 task assigned to Worker F. Reassignment rule runs and selects Case XXXXXXXX 2 tasks assigned to Worker A and 3 tasks assigned to Worker C. Those tasks are bundled together, and 5 tasks assign to Worker X (worker is configured to receive category of tasks). Case XXXXXXXX task assigned to Worker F remains with worker F as Worker F is not listed in Source Workers of the Reassignment Rule.
Priority/ Implementation Consideration(s):	This is high priority as there are many tasks getting assigned to separate workers.
Area(s) Impacted:	Task Mgmt
Committee:	Task Management

Attachments
CalSAWS Enhancement Request Form _ FRS (10) Case Bundling.docx (41 kB)