

Date: 4/4/2024	Location: Teams
Time: 1:30PM-5:00PM	Meeting called by: TM Facilitator

## Attendees:

Region 1: Miguel Garza, Claudia Lee for MyLynn Bui, Lorena Moran, Dee Guerrero for Aaron McDougal

Region 2: Shawna Reed, Chelsea Carson

Region 3: Jason Algea, Andrea Broughton, Serena Griffin

Region 4: John Garcia

Region 5: Shelly Nava, Melissa Billedo, Cesar Lema, Denise Casarez, Mike Kveen

Region 6: Mario Palacios

## Topic

## Important Points

### SCRs for Review

- CA-261371 Additional Worker Information on Task Pages
  - Introducing tool tip hover box which will include Worker Name and email when hovering over Worker ID. If Worker ID is not associated to staff, tool tip will display no information.
  - Committee supports adding hover for the Bank Name.
- CA-263040 Admin Functionality for Mass Task Closure
  - Capability to mass close tasks which will utilize task upload framework that already exists.
- CA-27341 Update MEDS Deceased Person Automated Action/Task Functionality
  - Expand Task creation functionality for all counties.
- CA-264181 Allow Deactivation of Task Banks
  - Design to allow deactivation of Task Banks reviewed with committee.
  - Committee supports preservation of configurations at deactivation and defaulting to active banks on search page.

### Discussion Topic

- CA-257327 Sunset Worklist Pages R24.05
  - Reminder of the sunsetting of the Worklist pages. This is coming in the May 2024 release. Tasks will be located at the very top of your home page. Work order will be moving under Case Info.

### CERs for Review

- CA-266625 Add Submit Month to Get Next Functionality
  - CER to add more customization to Get Next functionality and pull report tasks by submit month.

**Topic**

**Important Points**

- CA-270668 Task Reassignment Bundling Enhancement
  - CER to bundle by Source for Task Reassignment rules.
- CA-27395 Update Automated Action Task Details
  - CER to expand Automated Actions to be configurable by program.
- CA-275473 Append "In Process" Task Status
  - CER to allow append to In Process tasks.

**Open Forum**

- Any counties interested in a casual open forum about task management?
  - Counties left emails in Teams chat if interested

(Optional Items)

#	Action Item	Assigned To	Assigned Date	Due Date	Status
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1

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#	Decision Made	Who Made the Decision	Date
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