

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-241253

BenefitsCal - CBO task

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1.1 Overview .....	5
	2.1.2 Automated Action Detail – Reference Example .....	5
	2.1.3 Description of Changes .....	5
	2.1.4 Page Validations .....	6
	2.1.5 Page Location .....	6
	2.1.6 Security Updates.....	7
	2.1.7 Page Mapping.....	7
	2.1.8 Page Usage/Data Volume Impacts .....	7
3	Supporting Documents .....	8
4	Requirements.....	9
	4.1 Project Requirements.....	9
5	Migration Impacts .....	10
6	Outreach.....	11
7	Appendix.....	12

# 1 OVERVIEW

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This design describes modifications to the "Request to create a CBO account" Task.

## 1.1 Current Design

The Self-Service Portal will create a Task when a request for a Community Based Organization (CBO) Account is received. The Task assignment logic first looks for a Position in the County that can receive "External Agency Admin" Tasks. If a Position is not found, the logic looks for a Task Bank in the County that can receive "External Agency Admin" Tasks. For instances when both a Position and a Task Bank have been configured in the County to receive "External Agency Admin" tasks, the existing Task assignment logic will default to the configured position. In this scenario the tasks would never be assigned to the configured Task Bank.

The "Request to create a CBO account" Task does not utilize the Automated Action framework.

## 1.2 Requests

1. Introduce an Automated Action for the "Request to create a CBO account" Task. The Self Service Portal logic for the Task will use the Automated Action framework.
2. Modify the Default Assignment logic to evaluate for the Task Banks prior to Positions for the "Portal: CBO Account Request" Automated Action.

## 1.3 Overview of Recommendations

1. Create an Automated Action for the "Request to create a CBO account" Task Type.
2. Modify the Self Service Portal logic for the Task to use the Automated Action framework for the "Portal: CBO Account Request" Automated Action.
3. Modify the Default Assignment logic to evaluate for the Task Banks prior to Positions for the "Portal: CBO Account Request" Automated Action.

## 1.4 Assumptions

1. The Automated Action will be defaulted to Active for all Counties.
2. There are no impacts or modifications to the historical "Request to create a CBO account" Tasks.
3. If neither a Position nor a Task Bank is configured to receive "External Agency Admin" tasks, then a Task will not generate.
4. The Automated Action Detail page will serve as a reference to the configuration of the "Request to create a CBO account" Tasks. Refer to SCR CA-227291 for the initial functionality of the Task including the format of the Long Description field. The introduction of the Automated Action Detail page does not modify the behavior of the Task.

5. This enhancement does not modify any processing logic other than the Task Bank and Position assignment evaluation for this Task.

## 2 RECOMMENDATIONS

### 2.1.1 Overview

This section will outline recommendations to adjust a CalSAWS automated task to function within the Automated Action framework.

### 2.1.2 Automated Action Detail – Reference Example

#### Automated Action Detail

Close

**Action Information**

<b>Name:</b> Portal: CBO Account Request	<b>Type:</b> Create Task	<b>Status: *</b> Active
<b>Program(s):</b> Self Service Portal Programs	<b>Run Date:</b> Real Time	<b>Source:</b> Online
<b>Scenario:</b> A request for a CBO account has been received through the Self Service Portal.		

**Task Information**

<b>Task Type: *</b> Request to create a CBO account	
<b>Due Date:</b> Default Due Date	<b>Default Due Date:</b> 2 days
<b>Initial Assignment:</b> Default Assignment	<b>Default Assignment:</b> Office Distribution
<b>Long Description:</b> Request to create a CBO account has been received through BenefitsCal {param from BC}.	

Close

**Figure 2.1.2-1 – Automated Action Detail**

### 2.1.3 Description of Changes

Create an Automated Action for the “Request to create a CBO account” Task as follows:

1. Portal: CBO Account Request
  - a. Action Information
    - i. Name: Portal: CBO Account Request

- ii. Type: Create Task
- iii. Status: Active
- iv. Program(s): Self Service Portal Programs
- v. Run Date: Real Time
- vi. Source: Online
- vii. Scenario: A request for a CBO account has been received through the Self Service Portal.

b. Task Information

- i. Task Type: Request to create a CBO account
- ii. Task Sub-Type: N/A
- iii. Due Date: Default Due Date
- iv. Default Due Date: 2 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Office Distribution
- vii. Long Description: Request to create a CBO account has been received through BenefitsCal {param from BC}.

c. Recommendation

- i. Modify the Self Service Portal logic that creates the “Request to create a CBO account” Task to utilize the Automated Action framework. All fields on the Automated Action Detail page will be read only.
- ii. Modify the Self Service Portal Logic that creates the “Request to create a CBO account” Task to first look for a Task Bank in the County that can receive “External Agency Admin” Tasks. If a Task Bank is not found, look for an active Position that can receive “External Agency Admin” Tasks. This modification will allow Counties who wish to use the Get Next functionality with these Tasks to do so.

### 2.1.4 Page Validations

N/A.

### 2.1.5 Page Location

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin  
 Click on the hyperlink of the “Portal: CBO Account Request” Automated Action result displayed in the Automated Actions Search to navigate to the Automated Action Detail page. The Task Navigation will display if the user profile contains the “AutomatedActionsListView” security right.

### **2.1.6 Security Updates**

N/A.

### **2.1.7 Page Mapping**

N/A.

### **2.1.8 Page Usage/Data Volume Impacts**

There are no expected page usage/volume impacts.

### 3 SUPPORTING DOCUMENTS

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N/A.



## 4 REQUIREMENTS

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### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.4	The LRS shall generate alerts, reminders, and controls that may not directly affect eligibility.	This modification creates an Automated Action to be properly set up to support Office Distribution and Get Next functionalities.

## 5 MIGRATION IMPACTS

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N/A.

## 6 OUTREACH

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N/A.

## 7 APPENDIX

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N/A.