

CalSAWS | Enhancement Request (CER)

Submission Date	4/18/2024
Title	Bulk Reassignment

Region #: 1	County Name: Sonoma	
Submitter: August Blodow	Email: ablodow@schsd.org	Phone: (707) 565-2715

Program(s) Impacted:			
<input type="checkbox"/> Adoptive Services	<input type="checkbox"/> ARC	<input type="checkbox"/> CalFresh	<input type="checkbox"/> Cal-Learn
<input 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 type="checkbox"/> Schedule Appt
<input type="checkbox"/> Security	<input type="checkbox"/> Self Service Portal	<input type="checkbox"/> Special Investigation	<input checked="" 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			

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Other – specify

Justification / Request Summary: Add a task reassignment upload that reads off of task ID.

Issue:

- 1) In order for get next to work the task needs to be assigned to a null worker, be in assigned status and be in the proper task bank. Currently Sonoma has a main task bank and a high priority task bank with tasks that will flow from one task bank to the other. We are able to identify tasks in Apex that should be considered High Priority but then it becomes a manual process to move the task to the priority task bank as the task reassignment section does not let us go into enough detail to capture these cases.
- 2) When we have a training class new worker will be assigned tasks depending on various criteria (Such as aid codes, self-employment, pregnancy, etc.) or we will have a specialized worker working on specific tasks. It would be nice to assign to workers directly using Task Id

Proposed Recommendation:

Add an Excel import option where based off of task Id that will allow us to change worker id (Including the option to assign to a null worker), task bank Id and change to assign status.

Priority/Implementation Consideration(s):

The ability to bulk reassign will reduce the amount of manual work that our office support staff is doing.

CalSAWS Response:

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