

Date: July 25, 2024	Location: TEAMS Meeting
Time: 1:30 pm – 4:00 pm	Meeting called by: Task Management Facilitators

Attendees: Region 1: Terri Rose, Miguel Garza, Mylynn Bui, Lorena Moran, Joshua Eisenberg
 Region 2: Shawna Reed, Chelsea Carson
 Region 3: Jason Algea, Andrea Broughton, Serena Griffin, Dawn Alves
 Region 4: John Garcia, Tara Borba, Raudel Jauregui, Amy Rusca, Sara Camacho
 Region 5: Shelly Nava, Melissa Billedo, Cesar Lerma, Denise Casarez, Mike Kveen, Teresa (Autumn) Sheridan
 Region 6: Thomas Pan, Eirik Gunderson, Latrice Anderson, Mario Palacios, Sergio Andrade

Topic

Important Points

SCRs for Review

- CA-275500 Task Mgmt Configuration Admin Maintenance Enhancement - Phase 1

- Review of design modifications to Task Management functionality to provide additional information for specific Task Category configurations. The update will allow for exporting each task category and associations.

CERs for Review

- CA-276791 Bulk Reassignment
- CA-277542 Task Reassignment Prioritization and Language
- CA-277543 Task Reassignment prioritize PR/RE Tasks by Submit Month
- CA-278500 Display Program Worker ID and Assigned Date on Task Search Page
- CA-278501 Task Reassignment distribution based on task complexity
- CA-280106 Auto complete task when Customer Reporting is updated from Received to Reviewed – Ready to Run EDBC or Incomplete

- CER review requesting bulk task reassignment option to assign to a “null worker”. Request to assign to worker ID’s based on RE months, intake tasks, etc., tasks that can be sorted based on difficulty. Option to turn off/on included.
- CER review requesting new prioritization sort functionality to re-assign tasks by language match.
- CER review request for task prioritization re-assignment functionality to be available by PR/RE submit month task types.
- CER review to add two additional columns on task search and task search results page. Add field that shows worker number associated to the program and task assign date to see when the task was assigned to the worker for aging prioritization.
- CER review requests to have re-assignment functionality to assign tasks based on difficulty level. Task complexity would be dependent on county determination.
- CER review requests to auto clear tasks when associated to a related ‘complete’ report status.

Topic

Important Points

- CA-280108 Add Automated Actions – Incarceration
 - CA-280329 New Automated Actions/Tasks for CalWORKs, CalFresh, and Medi-Cal Pending Applications
- CER review requests to add 3 new automated actions for tracking incarcerated individuals and their expected release dates.
 - CER review requesting to have a task set when applications are in pending status and approaching the end of their application period timeframe.

#	Action Item	Assigned To	Assigned Date	Due Date	Status
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#	Decision Made	Who Made the Decision	Date
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