

Auto Case Assignment

This CalSAWS Quick Guide (QG) provides the end-user with functional instructions on setting up automatic case assignment and reassignment in the System.

The QG can be used as a training medium for the following situations:

- For displaying CalSAWS functional processes and changes
- To summarize and repeat key points from a Web-Based Training (WBT) or Job Aid

The QG may include functional instructions, as well as screenshots from the System. It may highlight new functional processes, pages, page sections, fields, drop lists, etc.

CalSAWS Process

In CalSAWS users can select criteria to enable the County to create more specialized caseloads and use the auto assignment functionality to assign or reassign eligible programs. Cases can be automatically assigned based on special indicators, case type, program type, maximum case counts, and language.

This guide provides information on the following topics:

- Position Detail Page
- Staff Detail Page
- System Flow

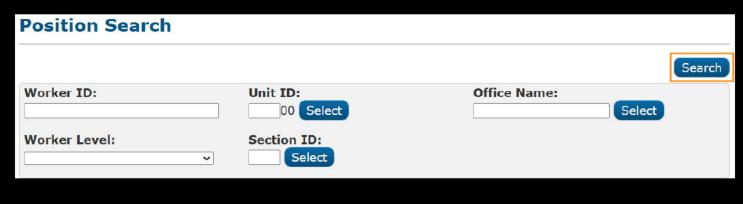
Position Detail Page

The Position Detail page allows users with the appropriate security rights to customize the programs that can be assigned or reassigned to a position (worker ID). It also contains criteria for assigning tasks and auto-scheduled renewal appointments.

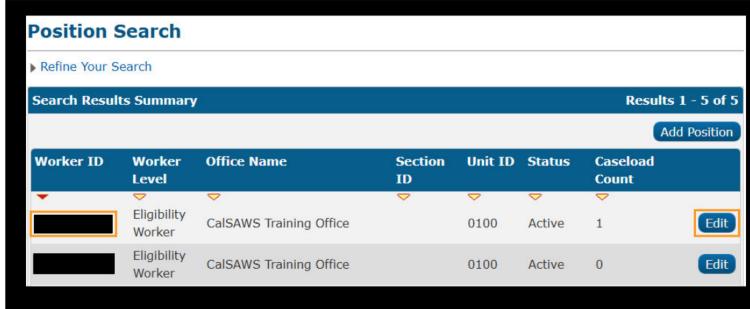
To navigate to the Position Detail page:

- 1. Place the cursor over **Admin Tools** on the **Global** navigation bar
- 2. Select **Office Admin** from the **Local** navigator
- 3. Click the **Position** link on the **Task** navigation bar
- 4. On the **Position Search** page, enter the appropriate search criteria and click the **Search** button **Note:** Entering search criteria is optional to narrow the search results.





- 5. In the **Search Results Summary** page section:
 - A. Click the Worker ID hyperlink to access the Position Detail page in view mode
 - B. Click the **Edit** button next to the appropriate **Worker ID** to access the **Position Detail** page in edit mode to make changes

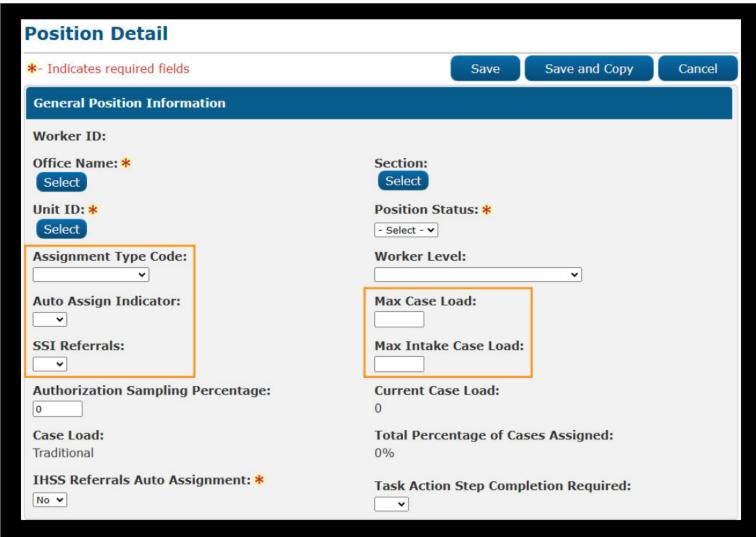


In addition to the mandatory fields, the following page elements should be updated on the Position Detail page for guto case assignment functionality:

- General Position Information page section
 - Assignment Type Code drop list
 - Determines if the position can accept intake case assignments only, continuing case assignments only or both
 - Determines if the position appears on the Select Worker search results when looking for a worker to assign a program
 - Enables the position to display as available for the appointment management functionality and the types of appointments they are available for (intake, continuing or both)
 - Auto Assign Indicator drop list
 - Selecting Yes indicates programs can be automatically assigned to the position.
 - Selecting No does not allow the System to automatically assign programs to the position
 - SSI Referrals



- Indicates if the position can receive SSI Referrals
- Max Case Load
 - Defines the maximum number of overall cases which can be assigned to the position via batch, regardless of program status (intake or continuing)
 - Once this limit has been reached, automatic assignments are not made by the System but can be made manually by a user
 - Scenario: One worker has a max case load of 10 cases and the other has one of 100. The System tries to balance it out so they both have an equal percentage of their maximum case load. If there were 11 programs to be assigned, 1 would go to the worker with max 10 caseload and 10 would go to the worker with max 100 caseload so they both are at 10 % of their caseload consumed.
- Max Intake Case Load
 - Defines the maximum number of intake cases which can be assigned to the position
 - Does not need to be completed for non-intake positions
 - Once this limit has been reached, automatic assignments are not made by the System but can be made manually by a user



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- Programs page section
 - Indicates the programs that can be assigned to the position via batch assignment, programs can still be manually assigned even if not selected on this page
 - Determines auto-scheduled renewal appointment assignment for different batches depending on the program(s) selected

Program(s)		
□ AAP	□ CAPI	□ CFET
□ Cal-Learn	□ CalFresh	□ CalWORKs
□ Child Care	☐ Disaster CalFresh	□ Diversion
☐ Foster Care	☐ GA/GR Employment Services	□ GA/GR Immediate Need
□ Homeless - Perm	□ Homeless - Temp	□ Immediate Need
□ Kin-GAP	□ Medi-Cal	□ Nutrition Benefit
□ RCA	□ REP	□ Welfare to Work

- Aid Codes Medi-Cal and CalWORKs page sections
 - Only display when Medi-Cal and/or CalWORKs were selected as programs
 - Allows aid code specific program assignment to assist with specialized caseloads

Aid Codes - Medi-Cal 🕸			
□ALL		□ 250% Program	
☐ All MAGI		□ Craig vs Bonta	
□ Deemed Child		☐ FFY Auto-Test	
☐ Foster Care, County Funded		☐ IHSS Plus Waivers	
☐ LTC / Board and Care		□ MSP	
☐ Minor Consent		☐ Non-MAGI, Aged Blind Disabled	
☐ Non-MAGI, Medi-Cal Transitions		□ Special Treatment	
☐ Transitional, CEC Full		☐ Transitional, Edwards vs Kizer	
Aid Codes - CalWORKs 👭			
□ALL	□ Non 4P/ 4R	□ 4P/ 4R	

- Case Flags page section
 - Indicates the case flags that can be associated with the position
 - Allows for specialized caseload assignment when applicable (Workload Reassignment Detail page)



Case Flags		
☐ Aid Paid Pending	☐ CW/RCA - Appeals/Hearing	☐ Error Prone/High Risk
☐ Federal/State Audit	□ MC - Appeals/Hearing	☐ Minor Consent
Open Fraud Investigation	☐ SB75 MC Restricted Scope Child Transition	□ Special Circumstance
☐ State Hearing Case		

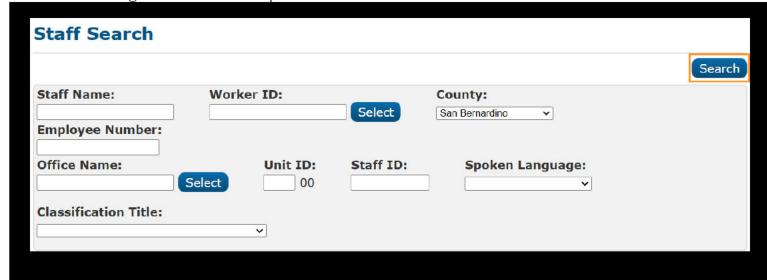
As a reminder, other non-mandatory fields should be completed on the Position Detail page according to your County's policy and procedures. Additional information on the Position Detail page can be found on Job Aid Positions – Manage.

Staff Detail Page

The Staff Detail page contains information about the staff record created. This information is used when associated to a position. Only users with the appropriate security rights can access and update this page.

To navigate to the Staff Detail page:

- 1. Place the cursor over Admin Tools on the Global navigation bar
- Select Office Admin from the Local navigator
- 3. On the **Staff Search** page, enter the appropriate search criteria and click the **Search** button **Note:** Entering search criteria is optional to narrow the search results.



- 4. In the Search Results Summary page section:
 - A. Click the Staff Name hyperlink to access the Staff Detail page in view mode
 - B. Click the **Edit** button next to the appropriate **Staff Name** to access the **Staff Detail** page in edit mode and make changes

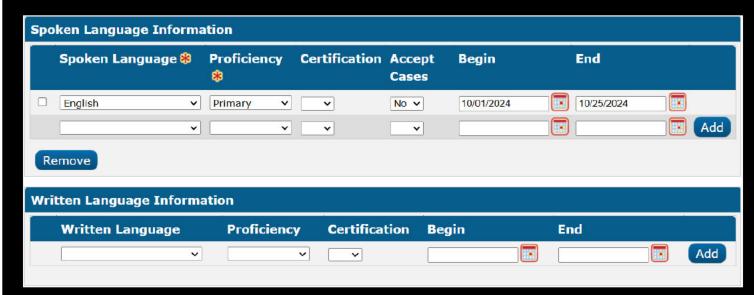
The page should be completed as appropriate based on your County's policy and procedures. Additional information can be found on Job Aid Staff – Manage.

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For auto case assignment, the following elements on the Spoken Language Information page section should be completed:

- Spoken Language drop list
 - Indicates the spoken language of the staff
 - Multiple lines can be added to select additional languages for multi-lingual staff
- Proficiency drop list
 - Indicates how well a staff member can perform in a certain language
 - Options include Certified, Non Certified and Primary

Note: The Written Language Information does not impact auto case assignment, however, it must be completed to save the page.



System Flow

Once the Staff and Position Detail pages are updated appropriately, auto case assignment occurs using the following criteria:

- 1. Special Indicator
- 2. Case Type and Program Type
- 3. Spoken Language
- 4. Maximum number of cases a position can be assigned

The System takes the following steps to find a worker and assign the case to that worker:

- 1. Attempt to find a worker who has criteria 1 to 4 listed above
- 2. If multiple workers are found, assign the case to the worker with the lowest caseload
- 3. If only one worker is found, assign the case to the worker
- 4. If no worker is found, attempt to find a worker using criteria 1 to 3 listed above
- 5. If multiple workers are found, assign the case to the worker with the lowest caseload
- 6. If one worker is found, assign the case to the worker
- 7. If no eligible workers are found no automatic assignment takes place
- 8. The case can be manually assigned on the Individual Workload Reassignment page or the Workload Reassignment Detail page