



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.



Position Search

Worker ID:

Unit ID:

Office Name:

Worker Level:

Section ID:

5. In the **Search Results Summary** page section:

- Click the **Worker ID** hyperlink to access the **Position Detail** page in view mode
- Click the **Edit** button next to the appropriate **Worker ID** to access the **Position Detail** page in edit mode to make changes

Position Search

▶ Refine Your Search

Search Results Summary

Results 1 - 5 of 5

Worker ID	Worker Level	Office Name	Section ID	Unit ID	Status	Caseload Count	
	Eligibility Worker	CalSAWS Training Office		0100	Active	1	<input type="button" value="Edit"/>
	Eligibility Worker	CalSAWS Training Office		0100	Active	0	<input type="button" value="Edit"/>

In addition to the mandatory fields, the following page elements should be updated on the Position Detail page for auto 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
 - ✕ Used to help balance out cases for auto assignment

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

Position Detail

*- Indicates required fields

Save

Save and Copy

Cancel

General Position Information

Worker ID:

Office Name: *

Select

Section:

Select

Unit ID: *

Select

Position Status: *

- Select -

Assignment Type Code:

Worker Level:

Auto Assign Indicator:

Max Case Load:

SSI Referrals:

Max Intake Case Load:

Authorization Sampling Percentage:

0

Current Case Load:

0

Case Load:

Traditional

Total Percentage of Cases Assigned:

0%

IHSS Referrals Auto Assignment: *

No

Task Action Step Completion Required:



- 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)

- | | | |
|--|--|---|
| <input type="checkbox"/> AAP | <input type="checkbox"/> CAPI | <input type="checkbox"/> CFET |
| <input type="checkbox"/> Cal-Learn | <input type="checkbox"/> CalFresh | <input type="checkbox"/> CalWORKs |
| <input type="checkbox"/> Child Care | <input type="checkbox"/> Disaster CalFresh | <input type="checkbox"/> Diversion |
| <input type="checkbox"/> Foster Care | <input type="checkbox"/> GA/GR Employment Services | <input type="checkbox"/> GA/GR Immediate Need |
| <input type="checkbox"/> Homeless - Perm | <input type="checkbox"/> Homeless - Temp | <input type="checkbox"/> Immediate Need |
| <input type="checkbox"/> Kin-GAP | <input type="checkbox"/> Medi-Cal | <input type="checkbox"/> Nutrition Benefit |
| <input type="checkbox"/> RCA | <input type="checkbox"/> REP | <input type="checkbox"/> 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 ✱

- | | |
|---|---|
| <input type="checkbox"/> ALL | <input type="checkbox"/> 250% Program |
| <input type="checkbox"/> All MAGI | <input type="checkbox"/> Craig vs Bonta |
| <input type="checkbox"/> Deemed Child | <input type="checkbox"/> FFY Auto-Test |
| <input type="checkbox"/> Foster Care, County Funded | <input type="checkbox"/> IHSS Plus Waivers |
| <input type="checkbox"/> LTC / Board and Care | <input type="checkbox"/> MSP |
| <input type="checkbox"/> Minor Consent | <input type="checkbox"/> Non-MAGI, Aged Blind Disabled |
| <input type="checkbox"/> Non-MAGI, Medi-Cal Transitions | <input type="checkbox"/> Special Treatment |
| <input type="checkbox"/> Transitional, CEC Full | <input type="checkbox"/> Transitional, Edwards vs Kizer |

Aid Codes - CalWORKs ✱

- | | | |
|------------------------------|-------------------------------------|---------------------------------|
| <input type="checkbox"/> ALL | <input type="checkbox"/> Non 4P/ 4R | <input type="checkbox"/> 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

- | | | |
|---|--|--|
| <input type="checkbox"/> Aid Paid Pending | <input type="checkbox"/> CW/RCA - Appeals/Hearing | <input type="checkbox"/> Error Prone/High Risk |
| <input type="checkbox"/> Federal/State Audit | <input type="checkbox"/> MC - Appeals/Hearing | <input type="checkbox"/> Minor Consent |
| <input type="checkbox"/> Open Fraud Investigation | <input type="checkbox"/> SB75 MC Restricted Scope Child Transition | <input type="checkbox"/> Special Circumstance |
| <input type="checkbox"/> 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
 2. 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.

Staff Search

Staff Name: <input type="text"/>	Worker ID: <input type="text"/> <input type="button" value="Select"/>	County: <div style="border: 1px solid #ccc; padding: 2px;">San Bernardino ▼</div>
Employee Number: <input type="text"/>		
Office Name: <input type="text"/> <input type="button" value="Select"/>	Unit ID: <input type="text"/> 00	Staff ID: <input type="text"/>
Spoken Language: <div style="border: 1px solid #ccc; padding: 2px;">▼</div>		
Classification Title: <div style="border: 1px solid #ccc; padding: 2px;">▼</div>		

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.



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.

Spoken Language Information						
Spoken Language *	Proficiency *	Certification	Accept Cases	Begin	End	
<input type="checkbox"/> English	Primary		No	10/01/2024	10/25/2024	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
						<input type="button" value="Add"/>
<input type="button" value="Remove"/>						

Written Language Information				
Written Language	Proficiency	Certification	Begin	End
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
				<input type="button" value="Add"/>

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