



Tasks: Setting Up Bundles, Append, Sibling and Expiration

This CalSAWS Quick Guide (QG) provides the end-user with information on task bundling, appending, sibling and expiration functionalities 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.

As a reminder, all System functionality described is dependent on the user's security rights.

This document is intended for County use. It is not intended for public distribution.

CalSAWS Process

In CalSAWS, tasks act as indicators for end users to be aware of any case actions, updates, or reviews needed. Tasks can be Project-Maintained or created by County users with the appropriate security rights when necessary. Actions on tasks are dependent on County business process and policy. Admin users can configure task functionality based on their County needs.

This guide provides administrative configuration information on the following topics:

- Task Management Admin Overview
- Bundle Case Tasks
- Sibling Tasks
- Append Tasks
- Task Expiration

Task Management Admin Overview

Admin users with the appropriate security rights can customize tasks within the Task Management Admin pages.

To access the Task Management Admin pages:

1. Place the cursor over **Admin Tools** on the **Global** navigation bar and select **Admin** from the **Local** navigator



CalSAWS Journal Tasks Help Resources Page Mapping Imaging Log Out

Riverside SYS6 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. **Admin Tools**

Welcome, Dymas Pena! Thurs

Worker ID: * Submit Case Number: Submit

Office Admin
Admin
Workload Assignment

The Admin Task navigation bar includes links for configuration of Automated Actions including:

- Document Routing
- MEDS Alert Admin
- Task Admin

▼ **Automated Actions**

Document Routing

MEDS Alert Admin

Task Admin

The Tasks section of the Admin Task navigation bar includes links for the configuration of Tasks including:

- Task Settings
- Task Categories
- Task Types
- Task Reassignment
- Task Upload

▼ **Tasks**

Task Settings

Task Categories

Task Types

Task Reassignment

Task Upload

Additional information on Task Management can be found in the following Job Aids:

- Task Management
- Task Management – Admin



Bundle Case Tasks

Counties can opt-in to bundle tasks within the System. If opted-in, the System pulls all tasks associated to a case that are in a status of Assigned but excludes assigning any tasks with a category and/or program the receiving position is not configured to receive. Reassignment processing finds a single task based on the criteria entered, and if bundling is selected the processing continues to grab all tasks on that case and reassign any that meet the receiving worker category and program criteria.

For example, a position receiving the task(s) may not be configured to receive IEVS category tasks or may not be configured to work the CalWORKs program. The System processing prevents those tasks from being bundled.

Note: The following task types are excluded from bundling:

- Tasks that result from a Clearance automated action
- Tasks with a Category of CSC that originated from a Customer Service Center Ticket
- Authorization tasks that were created through the Authorization process
- Tasks that resulted from the Customer Appointment: Scheduled Automated Action

To configure task bundles:

1. Click the **Task Settings** link on the **Task** navigation bar
2. On the **Task Settings** page click the **Edit** button
3. Click the **On** radio button for **Bundle Case Tasks**
4. Click the **Save** button

Task Settings

*- Indicates required fields

Save

Cancel

Description	On/Off
Task Assignment Suggest Worker	<input type="radio"/> On <input checked="" type="radio"/> Off
Bundle Case Tasks	<input checked="" type="radio"/> On <input type="radio"/> Off
Get Next Limit	<input type="radio"/> On <input checked="" type="radio"/> Off
Process Document Routing Rules for No Change SAR 7	<input type="radio"/> On <input checked="" type="radio"/> Off
Task Time Record	<input type="radio"/> On <input checked="" type="radio"/> Off
Prioritize ES/IN Tasks by Get Next	<input type="radio"/> On <input checked="" type="radio"/> Off
Process Append for In Process Status Tasks	<input type="radio"/> On <input checked="" type="radio"/> Off

Admin users can also configure task bundling when setting up Task Reassignments on the Task Reassignment Detail page



Reassignment Options

Primary Task Sort:
Due Date - Ascending

Secondary Task Sort:
Created Date - Ascending

Reclaim Open Tasks:
No

Due Date:
Any

Task Priority:
Any

Sibling Assignment:
No

Bundle Case Tasks:
No
Yes
No

Assigned Tasks

Users can also bundle case tasks by selecting Yes from the Bundle Case Tasks drop list during task reassignment on the following pages:

- Task Search page

Task Search

*- Indicates required fields
Refine Your Search

Search Results Summary

Results 1 - 2 of 2

	Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Worker ID	Bank ID	Date Appended	
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	CF	Manual	Update MEDs records	Assigned	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	MC	Manual	Update MEDs records	Assigned	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Action: * Assign to Me

Bundle Case Tasks: Yes

Remove Bank Assignment: No

Submit

- My Tasks page using the Get Next functionality



My Tasks
My Watchlist
Task Search
My Banks

My Tasks

Staff:
Samantha Varney

Worker ID:

Display Mode:
Standard

Results per Page: 25
Search

Get Next

Category: All

Language:

Bundle Case Tasks: Yes
Yes
No

Get Next

Sibling Tasks

The System evaluates tasks which already exist for the case and attempts to route new tasks based on existing task assignments. Task assignment logic evaluates the task category and program configurations on the Position Detail page while determining the sibling task worker.

Admin users can configure sibling task assignments on the following pages:

- Document Routing
 - Document Routing Rule Detail page
 - Document Routing Rule Program Detail page



Document Routing Rule Program Detail

* - Indicates required fields

Save And Return

Cancel

Program Information

Program: *

- Select -

AAP

CalFresh

Cal-Learn

CalWORKs

CAP

CFET

Child Care

Foster Care

General Assistance (Non-Mans

GA/GR Employment Services

Program Status:

- Select -

Active

Denied

Deferred

Deregistered

Discontinued

Exempt

Good Cause

Ineligible

Non-Comp

Pending

Distribution Type: *

- Select -

Sibling Assignment:

No

No

Yes

Save And Return

Cancel

- MEDS Alert Admin
 - MEDS Alert Admin Detail page

MEDS Alert Admin Detail

* - Indicates required fields

Save and Return

Cancel

MEDS Alert Information

Alert ID:
0004

Alert Description:
INVALID CHARACTER WITHIN FIELD

Alert Type:
ACCEPT

Alert Status:

Inactive

Task Information

Type:

Status: *

Due Date:

Default Due Date

Default Due Date:
10 days

Initial Assignment:

Default Assignment

Default Assignment:
MEDS Alert Task Distribution

Sibling Assignment:

Yes

No

Yes

Long Description:
MEDS Alert {Alert ID} - {Alert Description} has been received.

- Task Admin
 - Automated Action Detail page

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Automated Action Detail

Save And ReturnCancel

Action Information

Name:
Batch EDBC Program Skipped: Review Reason

Type:
Create Task

Status: *
Active

Program(s):
AA, HP, CW, IN, FC, DV, KG, MC, CF, HT, CP, RC

Run Date:
Daily(Mon-Sat)

Source:
Batch

Scenario:
EDBC was skipped for a case program during Batch processing. Review the skip reason and take appropriate action.

Task Information

Task Type: *
- Select -

Due Date:
Default Due Date

Initial Assignment:
Default Assignment

Sibling Assignment:
No
No
Yes

Default Due Date:
10 day cutoff for program

Default Assignment:
Current Program Worker

■ Task Upload

Task Upload										
Standard										
Case Number	Program	Task Type	Task Sub-Type	Start Days	Due Days	Automated Assignment	Manual Assignment - Worker ID	Manual Assignment - Bank ID	Sibling Assignment	Long Description (2000 max)
									Yes	

Note: The Task Upload Standard Template includes additional instructions on sibling assignment.

Append Tasks

In the System, you can configure append information on the Task Type and Task Sub-Type Detail pages for automated tasks. This allows the System to evaluate, at the time of automated task creation, whether to create a new task or append an existing task.

Note: This only applies to tasks with the status of Assigned unless the additional Task Setting is turned on for In Process. In which case, processing would apply to both Assigned and In Process.

To configure Append for In Process tasks:

- 1. Place the cursor over **Admin Tools** on the **Global** navigation bar
- 2. Select **Admin** from the **Local** navigator
- 3. Click the **Task Settings** link on the **Task** navigation bar



4. On the **Task Settings** page click the **Edit** button
5. Click the **On** radio button for **Process Append for In Process Status Tasks**
6. Click the **Save** button

Task Settings

* - Indicates required fields

Save

Cancel

Description	On/Off
Task Assignment Suggest Worker	<input type="radio"/> On <input checked="" type="radio"/> Off
Bundle Case Tasks	<input checked="" type="radio"/> On <input type="radio"/> Off
Get Next Limit	<input type="radio"/> On <input checked="" type="radio"/> Off
Process Document Routing Rules for No Change SAR 7	<input type="radio"/> On <input checked="" type="radio"/> Off
Task Time Record	<input type="radio"/> On <input checked="" type="radio"/> Off
Prioritize ES/IN Tasks by Get Next	<input type="radio"/> On <input checked="" type="radio"/> Off
Process Append for In Process Status Tasks	<input checked="" type="radio"/> On <input type="radio"/> Off

To append a task type or sub-type:

1. Click the **Task Types** link on the **Task** navigation bar
2. On the **Task Type List** page, click the **Edit** button for the appropriate task
3. Click the expand carat to expand the **Append Information** page section
4. Click the **Add** button
5. Select appropriate **Task Type** and **Task Sub-Type** (if applicable) from the **Task Type** and **Task Sub-Type** drop lists. When selecting a **Task Type** the **Task Sub-Type** drop list will display dynamically based on the **Task Type** selected.



Task Type Detail

* - Indicates required fields

Save and ReturnCancel

Task Type Information

Name: *

Contact Client

Category: *

Legacy

Priority:

Medium

Available Online:

☒

Available for Automation:

☒

Instructions:

Expire Tasks: *

No

Newly Assigned Indicator: *

Tasks display indicator for 5 day(s)

Sub-Type Information

Name	Available Online	Available for Automation	Priority	Task Expiration
Add				

Append Information

Task Type	Task Sub-Type
<input type="checkbox"/>	

RemoveAdd



▼ Append Information

Task Type	Task Sub-Type
<div><div><input type="checkbox"/></div><div>ABAWD Time Limit Request</div></div>	
<div><div><input type="checkbox"/></div><div>Absent Parent</div></div>	
<div><div><input type="checkbox"/></div><div>Action Required - Emergency</div></div>	
<div><div><input type="checkbox"/></div><div>Action Required - Non-Emergency</div></div>	
<div><div><input type="checkbox"/></div><div>Add Baby</div></div>	
<div><div><input type="checkbox"/></div><div>Add/Remove Person</div></div>	
<div><div><input type="checkbox"/></div><div>Address Change</div></div>	
<div><div><input type="checkbox"/></div><div>Adoption/Guardian Status</div></div>	
<div><div><input type="checkbox"/></div><div>Age Change</div></div>	
<div><div><input type="checkbox"/></div><div>Aid Paid Pending</div></div>	
<div><div><input type="checkbox"/></div><div>Alternate Format Correspondence Mailed</div></div>	
<div><div><input type="checkbox"/></div><div>Alternate Format Request</div></div>	
<div><div><input type="checkbox"/></div><div>Ancillary/Supportive Svcs</div></div>	
<div><div><input type="checkbox"/></div><div>Application</div></div>	
<div><div><input type="checkbox"/></div><div>Appt Needed</div></div>	
<div><div><input type="checkbox"/></div><div>Attendance</div></div>	
<div><div><input type="checkbox"/></div><div>Batch Eligibility</div></div>	
<div><div><input type="checkbox"/></div><div>CCRR Received</div></div>	
<div><div><input type="checkbox"/></div><div>CF 285 Received</div></div>	

6. Click the **Save and Return** button

You can also configure append information on the Task Sub-Type Information page section from the Task Type Detail page.

Task Sub-Type Detail

*- Indicates required fields

Save and Return

Cancel

Task Sub-Type Information

Task Type:

Add/Remove Person

Sub-Type Name: *

Example

Available Online:

☐

Available for Automation:

☐

Priority:

Expire Tasks:

▼ Append Information

Task Type	Task Sub-Type



Task Expiration

Tasks can be configured to expire once their associated program is closed or after a set number of days from when the task was created/started. This can be done at Task Type creation or when editing an existing Task Type configuration.

To set an expiration period for a task type or sub-type:

1. Place the cursor over **Admin Tools** on the **Global** navigation bar
2. Select **Admin** from the **Local** navigator
3. Click the **Task Types** link on the **Task** navigation bar
4. On the **Task Type List** page, click the **Add** or **Edit** button for the appropriate task
5. On the **Task Type Detail** page, select **Yes** from the **Expire Tasks** drop list
6. Enter **<Number>** of days in the **Expiration Period** field
7. Select applicable **<Expiration Type>** from the **Expiration Type** drop list
8. Click the **Save and Return** button

Task Type Detail

*- Indicates required fields

Save and Return Cancel

Task Type Information

Name: *
Address Change

Category: *
Legacy

Priority:
High

Available Online:
☒

Available for Automation:
☒

Instructions:

Expire Tasks: *
Yes

Expiration Period: *
 day(s)

Expiration Type: *
- Select -
- Select -
After Program Closes
After Task Created/Start Date

Newly Assigned Indicator: *
Tasks display indicator for 5 day(s)

You can also configure expiration information on the Task Sub-Type Information page section from the Task Type Detail page.



Task Sub-Type Detail

*- Indicates required fields

Save and ReturnCancel

Task Sub-Type Information

Task Type:
Address Change

Sub-Type Name: *

Available Online:
☐

Available for Automation:
☐

Priority:

Expire Tasks: *

Yes

Expiration Period: *
 day(s)

Expiration Type: *

- Select -

- Select -

After Program Closes

After Task Created/Start Date

Append Information

The Task Status transitions to Expired after a nightly batch evaluates the task for expiration based on the configuration of the Task Type/Task Sub-Type.

Task Detail

Result 1 of 1 - 2

Help

*- Indicates required fields

Task ID: 1177167148

Re-OpenPrintClose

Case Number

Case Name:
Case Name

Category: *
Self Service Portal Communications

Due Date: *
07/11/2024

Assign to Program Worker:
Yes

Long Description:

Type: *
Customer reported a change

Date Created:
07/03/2024

Worker ID:
33LS295J04

Program(s): *
CalWORKs -

Sub-Type:

Worker Assigned Date:
07/03/2024

Bank ID:

Status: *
Expired

Reference Number:

Priority:
Critical

Expedited:

Date Expired:
09/03/2024

Start Date:

Automated Action:
No

Instructions

Task History

Modified on 09/04/2024 05:11:43 AM by PB00T202 Batch

Field	Old Value	New Value
Status	Assigned	Expired

Note: The System does not purge the Expired task until one year after the expiration date.

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