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.
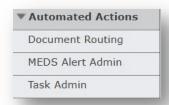
To access the Task Management Admin pages:

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

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

- 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

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	○ On ● Off
Bundle Case Tasks	● On ○ Off
Get Next Limit	○ On ● Off
Process Document Routing Rules for No Change SAR 7	○ On ● Off
Task Time Record	○ On ● Off
Prioritize ES/IN Tasks by Get Next	○ On ● Off
Process Append for In Process Status Tasks	○ On ● Off

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

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

- My Tasks page using the Get Next functionality

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
CAPI
CFET
Child Care
Foster Care
General Assistance (Non-Mana
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

- Task Upload

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	○ On ⦿ Off
Bundle Case Tasks	⦿ On ○ Off
Get Next Limit	○ On ⦿ Off
Process Document Routing Rules for No Change SAR 7	○ On ⦿ Off
Task Time Record	○ On ⦿ Off
Prioritize ES/IN Tasks by Get Next	○ On ⦿ Off
Process Append for In Process Status Tasks	⦿ On ○ 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 Return] [Cancel]

Task Type Information

Name: ❋   **Category:** ❋   **Priority:**
Contact Client   [Legacy   ▾]   [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
☐ [▾]	

[Remove]   [Add]

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 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: *	Category: *	Priority:
Address Change	Legacy	High

Available Online: **Available for Automation:**
☑   ☑

Instructions:

Expire Tasks: *   **Expiration Period: ***   **Expiration Type: ***
Yes   [   ] day(s)   - Select -
                                                               - Select -
Newly Assigned Indicator: *   After Program Closes
Tasks display indicator for [5] day(s)   After Task Created/Start Date

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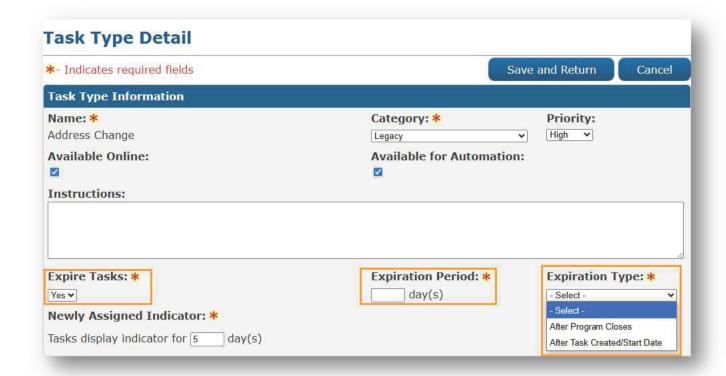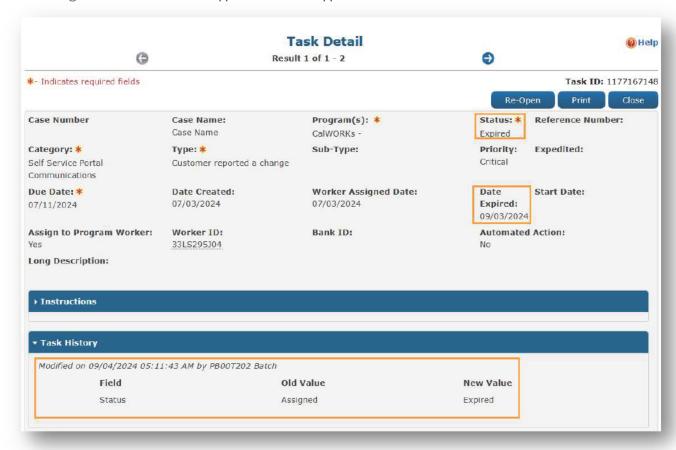
Task Sub-Type Detail

* - Indicates required fields   [Save and Return] [Cancel]

Task Sub-Type Information

Task Type:
Address Change

Sub-Type Name: *   **Available Online:**   **Available for Automation:**   **Priority:**
[   ]   ☐   ☐   [▾]

Expire Tasks: **Expiration Period: ***   **Expiration Type: ***
[Yes ▾]   [   ] day(s)   [- 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

❓Help

← Result 1 of 1 - 2 →

* - Indicates required fields   **Task ID:** 1177167148

[Re-Open] [Print] [Close]

| **Case Number** | **Case Name:** Case Name | **Program(s): *** CalWORKs - | **Status: *** Expired | **Reference Number:** |

Category: *   **Type: ***   **Sub-Type:**   **Priority:** Critical   **Expedited:**
Self Service Portal   Customer reported a change
Communications

Due Date: *   **Date Created:**   **Worker Assigned Date:**   **Date Expired:**   **Start Date:**
07/11/2024   07/03/2024   07/03/2024   09/03/2024

Assign to Program Worker: **Worker ID:**   **Bank ID:**   **Automated Action:**
Yes   33LS295J04   No

Long Description:

▸ **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.