

Distribution Date	July 2, 2025
To	PPOC.All; Committee.Training
CC	Consortium.RegionalManagers.All; Consortium.SectionDirectors;
CIT Name	<b>CalSAWS Quick Guides – Automated Tasks</b>

PPOCs, please forward to the appropriate impacted staff in your county:

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> General<br><input type="checkbox"/> Policy<br><input type="checkbox"/> CW<br><input type="checkbox"/> CF<br><input type="checkbox"/> MC<br><input type="checkbox"/> CMSP<br><input type="checkbox"/> FC/KG/AAP<br><input type="checkbox"/> Child Care<br><input type="checkbox"/> WtW<br><input type="checkbox"/> Other Program(s) _____<br><input type="checkbox"/> BenefitsCal<br><input type="checkbox"/> Customer Correspondence<br><input type="checkbox"/> OCAT<br><input type="checkbox"/> Other _____ | <input type="checkbox"/> Reports<br><input type="checkbox"/> Fiscal<br><input type="checkbox"/> Caseload Movement<br><input type="checkbox"/> Management<br><input type="checkbox"/> Batch and Interfaces<br><input type="checkbox"/> Fiscal<br><input type="checkbox"/> GA/GR<br><input type="checkbox"/> Help Desk<br><input type="checkbox"/> Imaging<br><input type="checkbox"/> Security<br><input checked="" type="checkbox"/> Task Management<br><input type="checkbox"/> Technical<br><input checked="" type="checkbox"/> Training |
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## Description

### Purpose

The purpose of this CIT is to inform Counties of the availability of one new Quick Guide – Automated Tasks. This Quick Guide is now available in the Learning Management System (LMS).


### Background

The CalSAWS Quick Guides were created to provide users additional training resources to assist them in performing functions in CalSAWS. They include step-by-step instructions as well as screenshots to enhance the learning experience.

### Additional Information

The **Automated Tasks** Quick Guide provides users with information on automated tasks available in the System and how to designate Task Types and Sub-Types to be available when configuring automated tasks. It includes information on the following automated tasks:

- Automated Actions
- Document Routing Rules

	<ul style="list-style-type: none"><li>■ MEDS Alerts</li></ul> <p><b>County Actions</b></p> <p>Please distribute this CIT and the CalSAWS Quick Guides to any County staff who perform these functions. The Quick Guides can be found in the LMS.</p> <p>Access to the LMS is available to all users and is encouraged. A request for access can be submitted as a Single or Bulk LMS Access Request through CalSAWS ServiceNow. Users needing access to the LMS must follow their County's process.</p> <p>If you have questions on this CIT, please reach out to the Primary Contact and cc your Regional Managers.</p>
Primary Project Contact	Corey Morris Policy Design Lead (916) 282-3711 <a href="mailto:MorrisC@CalACES.org">MorrisC@CalACES.org</a>
Backup Project Contact	Elizabeth Palm Trainer (323) 401-2082 <a href="mailto:PalmE@CalSAWS.org">PalmE@CalSAWS.org</a>
Attachments	CIT 0081-25 CalSAWS Quick Guide - Automated Tasks.pdf
Web Portal Link	  OR  You may also retrieve the CIT document and attachments by following these steps: <ol style="list-style-type: none"><li>1. Click on the CRFIs &amp; CITs link at the top of the page.</li><li>2. Click on the "CalSAWS Information Transmittal (CIT)" folder.</li><li>3. Click on the "2025" folder.</li><li>4. Click on the appropriate CIT # folder.</li></ol>