

Workload Management Bulletin

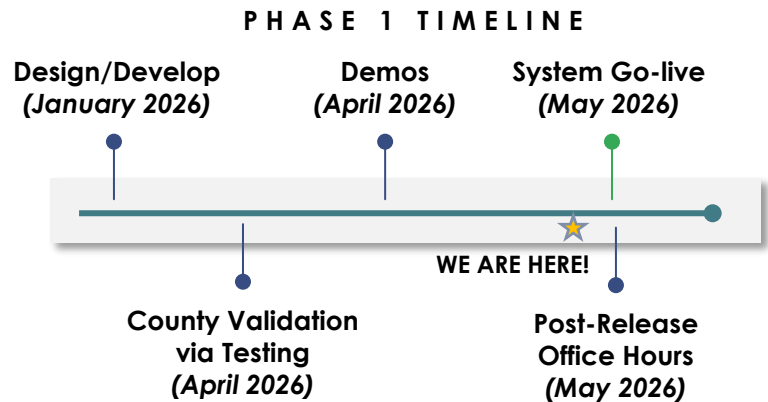
May 2026



PROJECT UPDATES

Phase 1 Go-Live is around the corner, see below for key dates to look out for:

- **May 18th | Go-Live**
- **May 18th – 22nd | Post Release Office Hours**
 - Daily office hours intended to provide Counties support after Phase 1 Go-Live



WORKLOAD MANAGEMENT HOT TOPICS

CalSAWS Workload Management (CA-293073) will be delivering several new and updated features. These updates will add and improve functionality for how users **manage schedules**, **manage workload**, and **maintain appointments** with customers. Simultaneously Phase 2 (CA-293075, 296462, 296514) updates are also progressing. Below is a high-level overview of upcoming activities across both phases:

Training Material Resources: Quick Guides, Web-Based Training, Online Help Pages, and Job Aids will be shared with County Staff. These resources will be available in the applicable spots in the Communication Portal and the LMS*.

System Demonstrations: Thank you everyone who joined us for the Phase 1 System Demonstrations! The demonstration session recordings and Q&A are available on the Communication Portal: Major Projects & Workgroups > All Projects & Workgroups > Workgroup: Workload Management – Phase 1.

Deeper Dive into Phase 2 SCRs (CA-296462 & 293075): In Phase 2 (26.09 Release) County staff can expect added support for Customer Appointment Tasks by introducing dedicated task settings and buttons to the My Tasks page, as well as updates to the Customer Appointment: Scheduled automated actions. Users will also see a new set of pages to define in relation to Workload Reassignment along with updates to assignment logic. Intake logic will also be revised to prioritize work based on lowest Daily Caseload Count.

*Follow County process to request LMS access for users who need to be added.

CalSAWS

