


Distribution Date	May 12, 2026
To	PPOC.All; Committee.Training; Committee.Usability
CC	Consortium.RegionalManagers.All; Consortium.SectionDirectors;
CIT Name	<b>CalSAWS Quick Guides for Workload Management</b>

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

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

Description	<p><b>Purpose</b></p> <p>The purpose of this CIT is to inform Counties of Quick Guides available for Workload Management Phase 1 functionality. A new Quick Guide, <b>My Work Overview</b>, has been created. In addition, the following Quick Guides have been updated:</p> <ul style="list-style-type: none"> <li>■ <b>Appointments and Schedules</b> (previously titled Appointments and Scheduling)</li> <li>■ <b>Auto Case Assignment</b></li> <li>■ <b>Workload Reassignment</b></li> </ul> <p>All Quick Guides are now available in the Learning Management System (LMS).</p> <p><b>Background</b></p> <p>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.</p> <p><b>Additional Information</b></p> <p>The <b>My Work Overview</b> Quick Guide provides users with information on how to access the My Work page. It includes page descriptions and functionality available to help them manage their weekly workload.</p>
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	<p>The <b>Appointments and Schedules</b> Quick Guide is updated to include new functionality for viewing schedules, maintaining schedules, customer appointments and maintaining appointments. It provides instructions on scheduling appointments and setting up an office schedule to display worker availability in the System.</p> <p>The <b>Auto Case Assignment</b> Quick Guide is updated to provide instructions on automatic case assignments and reassignment in the System. It also provides information on how Counties can configure criteria to create more specialized caseloads.</p> <p>The <b>Workload Reassignment</b> Quick Guide is updated to provide functional instructions on reassigning programs in the System. It includes information on new caseload reassignment pages.</p> <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 also 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>
<p>Primary Project Contact</p>	<p>Elizabeth Palm                  Training/Implementation Coordinator                  (916) 800-8363  <a href="mailto:PalmE@CalSAWS.org">PalmE@CalSAWS.org</a></p>
<p>Backup Project Contact</p>	<p>Sami Varney                  Training/Implementation Coordinator                  (916) 883-2927  <a href="mailto:VarneyS@CalSAWS.org">VarneyS@CalSAWS.org</a></p>
<p>Attachments</p>	<ul style="list-style-type: none"> <li>■ CalSAWS Quick Guide - Appointments and Schedules</li> <li>■ CalSAWS Quick Guide - Auto Case Assignment</li> <li>■ CalSAWS Quick Guide - My Work Overview</li> <li>■ CalSAWS Quick Guide - Workload Reassignment</li> </ul>
<p>Communication Portal Link</p>	<p></p> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"> <li>1. Hover over the Communications &amp; Resources tab at the top of the page.</li> <li>2. Click on the "CalSAWS Information Transmittal (CIT)" folder.</li> <li>3. Click on the "2026" folder.</li> <li>4. Click on the appropriate CIT # folder.</li> </ol>