



BREAKOUT SESSION 3
**MANAGING THE LINEUP:
WORKLOAD ASSIGNMENT (R26.05)**





BREAKOUT SESSION 3: PRESENTER ENSEMBLE
CHA CHA CHANGES
TRIO



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Background
Phase 1 Overview
Organizational Change Management
Phase 1 Go-Live and Next Steps
Phase 2 Overview



BACKGROUND

BACKGROUND

2024

REQUIREMENTS GATHERING

Workgroup Recruited via CRFI 23-128

Activities

Regional Workshops
Workgroup Meetings
County Site Visits
Regional Manager Touchpoints

44

Counties

122

Participants

6

4-Hr Sessions

7

Site Visits

REQUIREMENT THEMES

1. Appointment Scheduling & Workload Assignment
2. Maintain Worker Availability/Schedules
3. Appointment Reassignment
4. Appointment & Workload View
5. Application Prioritization
6. Reports
7. Training & Change Management



BACKGROUND

2025

DESIGN DEVELOPMENT

Workgroup Recruited via CRFI 25-021

Activities

Workgroup Meetings
Collaborative Design Discussions
Review and Feedback Incorporation
Finalization and Sign-Off

16

Counties

18

Participants

25

2-Hour Sessions

150

Reqs Incorporated

2026

FUNCTIONAL AREAS

1. Appointment Management
2. Workload Management
3. Schedule Management
4. Overall Management
5. Admin Management
6. Workload Prioritization
7. Appointment Tasks
8. Reports



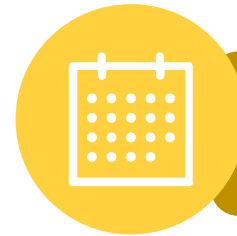
BACKGROUND

2026

PHASE 1



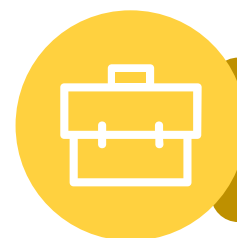
Appointment Management



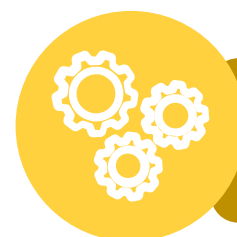
Schedule Management



Workload Management



Overall Management



Admin Configuration



Release 26.05

PHASE 2



Workload Prioritization



Appointment Tasks



Reports



Release 26.09





PHASE 1 OVERVIEW

APPOINTMENT MANAGEMENT

OBJECTIVE

Enhance the appointment management experience by streamlining scheduling workflows, improving visibility and control for users, and ensuring more efficient, accurate, and user-friendly coordination of appointments across the system.

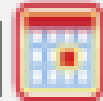
KEY CHANGES

- ♪ Provided staff **real-time visibility into worker availability** when creating appointments to improve scheduling accuracy.
- ♪ Enabled **automated and bulk reassignment of appointments** to increase workforce efficiency.
- ♪ **Streamlined appointment categories** by reducing the number of them to standardize how appointments are classified and managed.



APPOINTMENT MANAGEMENT: SCHEDULING

Dates

Begin Date: *  **Begin Time: *** **Appointment Duration: ***

System Suggested Time(s):

- 03/17/2026 from 2:00 PM to 2:30 PM
- 03/17/2026 from 2:15 PM to 2:45 PM
- 03/17/2026 from 2:30 PM to 3:00 PM
- 03/17/2026 from 3:45 PM to 4:15 PM
- 03/17/2026 from 4:00 PM to 4:30 PM
- 03/17/2026 from 4:15 PM to 4:45 PM
- 03/17/2026 from 4:30 PM to 5:00 PM

Limited suggested times provided

No functionality to search across multiple workers to choose the best fit



APPOINTMENT MANAGEMENT: SCHEDULING

NEW STATE

Scheduling Assistant

*- Indicates required fields

Cancel

Refine Your Search

Search

Filter By: Availability

Region: District: Office: CalSAWS Project Office Remove Unit: All 00

Program: AAP CAPI CFET Language: English Spanish American Sign Language Priority: High Medium Low

Appointment Category: Telephone Interview Flexible Block Appointment

Date: 08/01/2025 Begin Time: End Time: Duration: 30 minutes

Results per Page: 25 Search

Legend

Available: Unavailable: Out of Office: Office Not Open:

Search for workers based on criteria relevant to the appointment

View worker schedules when selecting an appointment time

Search Results Summary

Results 1 - 25 of 129

1 2 3 4 5 6 Next Select

08/01/2025

Worker ID *	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM
<input type="checkbox"/> 90AS00001Q												
<input type="checkbox"/> 90AS00002Q												
<input type="checkbox"/> 90AS00003Q												
<input type="checkbox"/> 90AS00004Q												
<input type="checkbox"/> 90AS00005Q												
<input type="checkbox"/> 90AS00006Q												
<input type="checkbox"/> 90AS00007Q												
<input type="checkbox"/> 90AS00008Q												
<input type="checkbox"/> 90AS00009Q												
<input type="checkbox"/> 90AS00010Q												
<input type="checkbox"/> 90AS00011Q												
<input type="checkbox"/> 90AS00012Q												
<input type="checkbox"/> 90AS00013Q												
<input type="checkbox"/> 90AS00014Q												
<input type="checkbox"/> 90AS00015Q												
<input type="checkbox"/> 90AS00016Q												
<input type="checkbox"/> 90AS00017Q												
<input type="checkbox"/> 90AS00018Q												
<input type="checkbox"/> 90AS00019Q												
<input type="checkbox"/> 90AS00020Q												
<input type="checkbox"/> 90AS00021Q												
<input type="checkbox"/> 90AS00022Q												
<input type="checkbox"/> 90AS00023Q												
<input type="checkbox"/> 90AS00024Q												
<input type="checkbox"/> 90AS00025Q												

Appointment Information

Appointment Date: 08/01/2025 Appointment Begin Time: * - Select - Appointment Duration: 30 minutes Flexible End Time: * - Select -

Select

1 2 3 4 5 6 Next

Cancel



APPOINTMENT MANAGEMENT: APPOINTMENT REASSIGNMENT

Only can
reassign
appointments
one at a time

Customer Appointment Detail

* - Indicates required fields

Edit Attendance Reschedule **Edit** Close

Attendees

Customers*	Attendance
Smith, Joe 35M	Showed
Smith, Jane 35F	Showed

General Information

Case Number:
4325671

Category: *
Counselor Meeting

Flexible Block Appointment

Phone Number: *
(555)555-5555

Office:
CalSAWS Project Office

Location: *
123 MAIN ST
NORWALK, CA 90650

Status: *
Completed

Initiate Call: *
Worker

Extension:

Language:
English

Appointment Letter Comments:

Appointment Comments:

Program Information *

CalFresh	<input checked="" type="checkbox"/> CalWORKs
GA/GR	GAGR ES/GROW
Medi-Cal	WTW/REP
Other	

Schedule Appointment *

Date:	Begin Time:	Duration:	Flexible End Time:
09/17/2025	10:00 AM	30 minutes	12:00 PM

Workers:
36LSAOWQ0C, 36LS04KM0D

▶ Status History

Edit Attendance Reschedule **Edit** Close



APPOINTMENT MANAGEMENT: APPOINTMENT REASSIGNMENT

Reassign appointments in bulk

Set rules for these to run on a recurring basis

Appointment Reassignment Detail

*- Indicates required fields

Title: Appointment Reassignment **Status:** Active

Scheduled By: Ruthie Demien **Last Run Date:** 10/10/2025

Appointment Source(s)

Source Worker(s)

<input type="checkbox"/>	Level	Number	Name
<input type="checkbox"/>	Office	00	CalSAWS Project Office
<input type="checkbox"/>	Unit	0100	Barstow ESP 22 Admin
<input type="checkbox"/>	Worker	36AS00496Q	Makenzie Johnson

Source Case(s)

<input type="checkbox"/>	Level	Number	Name
<input type="checkbox"/>	Case	1234567	Case Name

Reassignment Options

Appointment Category: General Appointment **Appointment Type:** Telephone Interview Intake

Appointment Status: Scheduled **Language:**

Reassign All Appointments Scheduled within the Next: 2 Weeks

Programs

<input checked="" type="checkbox"/> CalFresh	<input type="checkbox"/> CalWORKs
<input type="checkbox"/> GA/GR	<input type="checkbox"/> GAGR ES/GROW
<input type="checkbox"/> Medi-Cal	<input type="checkbox"/> WTW/REP
<input type="checkbox"/> Other	

Appointment Destination(s)

Destination Worker(s)

<input type="checkbox"/>	Level	Number	Name
<input type="checkbox"/>	Office	00	CalSAWS Project Office

Recurrence

Frequency: Every Other Week **Begin Date:** 09/11/2025 **End Date:** 01/20/2026

Weekday(s): Monday Tuesday Wednesday Thursday Friday

Buttons: Save and Return, Cancel



SCHEDULE MANAGEMENT

OBJECTIVE

Strengthen schedule management by expanding visibility into worker schedules and introducing scalable tools to streamline and accelerate workforce scheduling.

KEY CHANGES

- ♪ **Added additional schedule pages** to enhance visibility into worker schedules.
- ♪ Enhanced Maintain Worker Schedule page to allow for **bulk addition of schedule blocks to worker schedules** via the following methods: Manually, Template, Copy Worker Schedule.
- ♪ Added **Worker Schedule Upload functionality** to provide the ability to upload worker schedules in mass.



SCHEDULE MANAGEMENT: MAINTAIN WORKER SCHEDULE

Maintain Worker Schedule

*- Indicates required fields

Save and Continue Cancel

Display By

Office: CalSAWS Project Office Unit: All 00 00 00

Name	Worker ID	Functional Title
<input type="checkbox"/> Sticker, Deneen	90DP0000ZZ	Eligibility Specialist - Cambodian LC

Establish Schedule

Category: * Begin Date: * 03/17/2026 Begin Time: * End Time: * Unavailable for Tasks all day

Repeat Information

Do not repeat

Repeat week on Su Mo Tu We Th Fr Sa

Repeat on the of the month

End Date: 03/17/2026

Save and Continue Cancel

Can only add one schedule category at a time

Users must come back to this page multiple times to create a schedule for day



SCHEDULE MANAGEMENT: MAINTAIN WORKER SCHEDULE

Added multiple schedule blocks at the same time

Reduces the number of times the user has to come back to this page to add additional schedule blocks

Added functionality to add multiple schedule blocks across one day and across a whole week

Maintain Worker Schedule

*- Indicates required fields

Save and Continue Cancel

Display By

Office: Redlands TAD/WTW/Child Care/WIA/FC/PID Unit: All 02 06 63 Worker ID:

Name	Worker ID	Functional Title
<input checked="" type="checkbox"/> Bogumil, Nancee	36AS04AX09	Office Assistant III
<input type="checkbox"/> Krumrine, Sherwin	36AS04AX0A	TAD District Manager
<input type="checkbox"/> Muhammed, Sheena	36AS04AX0C	Supervising Office Assistant
<input type="checkbox"/> Laesser, Rae	36AS04AX0D	TAD District Manager
<input type="checkbox"/> Swing, Recep	36AS04AX0F	Office Assistant II
<input type="checkbox"/> Ichinose, Mayo	36AS04AX0H	Office Assistant II
<input type="checkbox"/> Siders, Augustus	36AS04AX0I	Public Service Employee
<input type="checkbox"/> Riddock, Claude	36AS04AX0J	Office Assistant I
<input type="checkbox"/> Crismond, Andries	36AS04AX0L	Supervising Office Assistant

Establish Schedule

Method: * Set For: * Unavailable for Tasks All Day: Mo Tu We Th Fr Sa Su

Monday

Category	Begin Time	End Time
<input type="checkbox"/> Available	7:00 AM	10:00 AM
<input type="button" value="- Select -"/>	<input type="button" value="- Select -"/>	<input type="button" value="- Select -"/>

Tuesday

Category	Begin Time	End Time
<input type="button" value="- Select -"/>	<input type="button" value="- Select -"/>	<input type="button" value="- Select -"/>

Wednesday

Thursday

Friday

Saturday

Sunday

Repeat Information

Frequency: * Recurrence: * Begin Date: * End Date: *

Save and Continue Cancel



SCHEDULE MANAGEMENT: WORKER SCHEDULE UPLOAD DETAIL

No Original State

Users can fill out an excel with the schedule blocks to add to worker schedules

Worker Schedule Upload
Templates

Worker Schedule Upload Detail

*- Indicates required fields Close

Worker Schedule Upload Information

Name: * Worker Schedule Upload 3	Status: Upload Complete
Templates Type: * Standard	File Name: Worker Schedule Upload 3.xlsx
Created By: Makenzie Johnson	Updated On: 08/01/2025
Notes:	

Preview Information

Upload approved on 08/01/2025 03:20:33 PM by Anna Logan (90AS002V00)

Value	Number of Schedule Blocks
Schedule Blocks without Errors	3
Schedule Blocks with Errors	3
Total Schedule Blocks	6

Upload Information

Upload completed on 08/01/2025 03:20:34 PM

Value	Number of Schedule Blocks
Schedule Blocks without Errors	3
Schedule Blocks with Errors	3
Total Schedule Blocks	6

Worker Schedule Upload						
Worker ID	Schedule Category	Date	Begin Time	End Time	Unavailable for Tasks All Day	
90AS0017Q	Available	07/01/2026	7:00 AM	11:30 AM		
90AS0017Q	Desk Time	07/02/2026	9:00 AM	11:30 AM		
90AS0017Q	Unavailable	07/03/2026	9:00 AM	5:00 PM	Yes	
90AS0017Q	Available	07/04/2026	7:00 AM	5:00 PM		
90AS0017Q	Available	07/05/2026	7:00 AM	11:30 AM		



WORKLOAD MANAGEMENT

OBJECTIVE

Improve workload management by increasing automation, enabling large-scale updates, and enhancing visibility into workload activity to support more efficient and accountable operations.

KEY CHANGES

- 🎵 **Automated workload reassignment** by providing capability to turn workload reassignments into rules that run on recurring bases.
- 🎵 Added **Workload Assignment Upload functionality** to provide the ability to upload workload assignments in mass.
- 🎵 Provided **Workload Reassignment History** that provides clear visibility into workflow movement to strengthens oversight and accountability.



WORKLOAD MANAGEMENT: WORKLOAD REASSIGNMENT DETAIL

Workload reassignments can only happen once, either immediately or at a future date

Workload Reassignment Detail

* - Indicates required fields Reassign

Unconfirmed Assignments: 10

From:

Worker ID: Select

Case Number: Select

From Any Eligible Position Office: CalSAWS Project Office Select

Reassign Quantity:

Number of Cases:

Entire Workload

Program: * **Language: ***

- Select - Any

Case Flag: **Status:**

▼ ▼

To:

Worker ID: Select

Unit Office: Select Unit: ▼

Auto Assign to Eligible Positions Office: CalSAWS Project Office Select Remove

Auto Assign to Eligible Position in County

Effective Date:

Effective Date: 📅

Immediate Assignment

Reassignment Option

Automatically Reassign When Activated: *

- Select -

Print New Worker Letter

Reassign



WORKLOAD MANAGEMENT: WORKLOAD REASSIGNMENT DETAIL

Added functionality for recurrence

This automates workload reassignments to run without user intervention

Workload Reassignment Detail

* - Indicates required fields

Save Cancel

Unconfirmed Assignments: 0

Title: * Workload Reassignment **Status:** Active

Scheduled By: Makenzie Johnson **Last Run Date:** 10/27/2025

From:

Worker ID: Select Remove

36LS04KM0D

Case Number: Select

From Any Eligible Position **Office:** CalSAWS Project Office Select

Reassign Quantity:

Number of Cases: 10

Entire Workload

Program: * All **Language: *** Any

Case Flag: Status: RE Date:

To:

Worker ID: Select

Unit **Office:** Select **Unit:**

Auto Assign to Eligible Positions **Office:** CalSAWS Project Office Select Remove

Auto Assign to Eligible Position in County

Recurrence

Frequency: * Weekly **Begin Date: *** 09/11/2025 **End Date: *** 09/11/2026

Weekday(s): *

Monday Tuesday Wednesday

Thursday Friday

Reassignment Option

Automatically Reassign When Activated: *

No

Print New Worker Letter

Save Cancel



WORKLOAD MANAGEMENT: WORKLOAD ASSIGNMENT

Limited search criteria

When choosing which worker to assign, users used the Select Worker page, which has limited information relevant to assigning cases

Select Worker

▼ Refine Your Search

Last Name: <input type="text"/>	First Name: <input type="text"/>	Worker ID: <input type="text"/>
Classification Title: <input type="text"/>	Office: <input type="button" value="Select"/>	Unit: <input type="text"/>
Employee Number: <input type="text"/>	Results per Page: <input type="text" value="25"/> <input type="button" value="Search"/>	

Search Results Summary

Results 1 - 25 of 39
[1](#) [2](#) [Next](#)

Name	Worker ID	Section ID	Login Status	Classification Title
<input checked="" type="radio"/> Alf, Johnna	19DCXRSW0B	61	Active - FT	Other
<input type="radio"/> Archilla, Johnsie	19DP07GR0U	1Z	Temp Inactive	Eligibility Worker II
<input type="radio"/> Clennon, Johna	19DP27A103	20	Active - FT	Eligibility Worker II
<input type="radio"/> Corner, Johna	19DCCCGBE4	3I	Active - FT	Other
<input type="radio"/> Crafton, Johna	19DPL6WCOG	53	Active - FT	Program Assistant, PSS
<input type="radio"/> DePauw, John	19AS00M400		Active - PT	Case Manager
<input type="radio"/> Delonville, Johna	19DCCQGT4	3I	Active - FT	Other
<input type="radio"/> Denamur, Johnsie	19DP36900J	5R	Active - FT	Eligibility Worker II
<input type="radio"/> Depauw, John	19AS00DM00		Active - PT	Case Manager
<input type="radio"/> Duroisin, Johnna	19DP92TD03	2E	Active - FT	Eligibility Worker I
<input type="radio"/> Feeler, Johna	19DP403A05	51	Active - FT	Eligibility Worker II
<input type="radio"/> Gipson, Johna	19DP51C818	51	Active - FT	Eligibility Worker II
<input type="radio"/> Helaers, Johnsie	19DCCHVF04	3I	Active - FT	Other
<input type="radio"/> Hergenreter, Johnnie	19DP261H20	51	Active - FT	Intermediate Typist-Clerk
<input type="radio"/> Hernandez, John	19DPLK0116	4A	Inactive	Other
<input type="radio"/> Imbach, Johnsie	19DCY9SW0K	62	Active - FT	Children's Social Worker II
<input type="radio"/> Jong, Johnnie	19DPL6W302	08	Active - FT	Eligibility Worker III
<input type="radio"/> Kenson, Johnna	19DPZF2607	4X	Active - FT	Eligibility Worker II
<input type="radio"/> Landt, Johna	19DPLK0112	4A	Active - FT	Other
<input type="radio"/> Laseur, Johna	19DPLOQ31S	3I	Active - FT	Other
<input type="radio"/> Makenzie, Johnson	19AS002T00	BS	Active - PT	Case Manager
<input type="radio"/> Mcclod, Johnette	19DPL6Q32R	3I	Active - FT	Program Assistant, PSS
<input type="radio"/> Missal, John	19AS00LV00		Active - PT	Case Manager
<input type="radio"/> Mortell, Johnsie	19DPL1Q32S	3I	Active - FT	Other
<input type="radio"/> Pope, John	19AS00IE00		Active - PT	Case Manager

[1](#) [2](#) [Next](#)



WORKLOAD MANAGEMENT: WORKLOAD ASSIGNMENT

Specialized page for searching for workers when assigning cases with relevant search fields

Can see a worker's capacity to take new case assignments

Workload Assignment Assistant

*- Indicates required fields

Cancel

Refine Your Search

Search

Filter By: * Capacity

Region: District: 002 - Glendale Office: Select

Program: Linkages Adult Service, Medi-Cal, Multipurpose Senior S, NACF Language: English, Spanish, American Sign Langu: Priority: High, Low, Medium

Include Workers at Max Capacity

Results per Page: 25 Search

Search Results Summary Results 1 - 25 of 196

1 2 3 4 5 6 7 8 Next

Select

Worker ID *	Daily Assignment Capacity	Monthly Assignment Capacity
19DP021401	0 out of ∞ filled	0 out of ∞ filled
19DP021H01	0 out of ∞ filled	0 out of ∞ filled
19DP021S00	0 out of ∞ filled	0 out of ∞ filled
19DP021SOC	0 out of ∞ filled	0 out of ∞ filled
19DP021S01	0 out of ∞ filled	0 out of ∞ filled
19DP021U00	0 out of ∞ filled	0 out of ∞ filled
19DP021U01	0 out of ∞ filled	0 out of ∞ filled
19DP021X00	0 out of ∞ filled	0 out of ∞ filled
19DP021X01	0 out of ∞ filled	0 out of ∞ filled
19DP021X02	0 out of ∞ filled	0 out of ∞ filled
19DP021Z00	0 out of ∞ filled	0 out of ∞ filled
19DP021Z01	0 out of ∞ filled	0 out of ∞ filled
19DP021Z02	0 out of ∞ filled	0 out of ∞ filled
19DP021Z04	0 out of ∞ filled	0 out of ∞ filled
19DP022D00	0 out of ∞ filled	0 out of ∞ filled
19DP022D01	0 out of ∞ filled	0 out of ∞ filled
19DP022E00	0 out of ∞ filled	0 out of ∞ filled
19DP022E01	0 out of ∞ filled	0 out of ∞ filled
19DP022F00	0 out of ∞ filled	0 out of ∞ filled
19DP022F01	0 out of ∞ filled	0 out of ∞ filled
19DP024C04	0 out of ∞ filled	0 out of ∞ filled
19DP024C05	0 out of ∞ filled	0 out of ∞ filled
19DP024C06	0 out of ∞ filled	0 out of ∞ filled
19DP024C07	0 out of ∞ filled	0 out of ∞ filled
19DP024C08	0 out of ∞ filled	0 out of ∞ filled

Select

1 2 3 4 5 6 7 8 Next

Cancel



WORKLOAD MANAGEMENT: WORKLOAD REASSIGNMENT RUN HISTORY

No Original State

Workload Reassignment Run History

* - Indicates required fields

Close

Run Date Begin Date: * 10/08/2025

Run Date End Date: * 10/09/2025

View

Run Date	Number of Reassignments
10/08/2025	10
10/09/2025	15

Export

Export

Close

Added functionality to export a detailed report of all the workload reassignments that occurred via a workload reassignment rule

Case Number	Program	From Worker ID	To Worker ID	Run Date	Scheduled By
1234567	CalFresh	36LS04KM0D	36LSAOWQ0C	10/07/2025	91
1234567	CalWORKs	36LS04KM0D	36LSAOWQ0C	10/07/2025	91
2341568	Medi-Cal	36LS04KM0D	36LSAOWQ0C	10/07/2025	91

Users can tell if an assignment was unsuccessful if the **To Worker ID** is blank



OVERALL MANAGEMENT

OBJECTIVE

Create tools for overall management to centralize work, appointments, tasks, etc. that a worker has assigned to them.

KEY CHANGES

- ♪ Introduced a **new My Work page** that displays a user's upcoming schedule, appointments, tasks, assignments, and e-messages in one location to streamline productivity.
- ♪ **Updated Homepage** to allow users to access the Worker Schedule page directly without using the Admin Tools set of pages to increase worker control over their own schedule.



OVERALL MANAGEMENT: MY WORK/TASKS

Work can be found across multiple different pages in CalSAWS

My Tasks
My Watchlist
Task Search
My Banks

Task Search

* - Indicates required fields
[Refine Your Search](#)

Search Results Summary
Results 1 - 7 of 7

	Due Date	Case	Case Name	Program	Category	Type/Sub-Type	Status	Worker ID	Bank ID	Date Appended	Language	
<input type="checkbox"/>	! ! 02/03/2026	SCCC3E5	Case Name	NB	Application Registration	CF 285A Pre-Pop Received	Assigned	90AS0001G8	19ASL1000KBK		Spanish	Complete Edit
<input type="checkbox"/>	! ! 02/20/2026	SCCC3E5	Case Name	CF	Application Registration	CF 285A Pre-Pop Received	Assigned	19AS00002F			English	Complete Edit

Worker Schedule Search

* - Indicates required fields
[Refine Your Search](#)

Search Results Summary
Results 1 - 25 of 43

Date	Fixed Appt.	Block Appt.	Case	Customer	Type	Status
03/17/2026	8:00 AM to 8:15 AM		B0J8M85	BRITTNEY BERDUX	Case Management Appointment	Rescheduled
03/17/2026	9:15 AM to 9:30 AM		L4177B4	LADDIE EMEL SWENK	Case Management Appointment	Rescheduled
03/17/2026	9:30 AM to 9:45 AM		B1U1263	DAWNA SHILTS	Case Management Appointment	Rescheduled
03/17/2026	10:15 AM to 10:30 AM		B02VH43	JACQUELINA RAILSBACK	Case Management Appointment	Rescheduled
03/17/2026	3:00 PM to		CH3BS01	CATALDO	Case	Rescheduled

Application Date	Auth Date	RE Date	CFS
10/30/2025			
09/12/2025			
07/05/2023			
12/07/2017			
03/26/2024			
08/29/2025			
04/19/2019			
06/12/2015			
05/05/2025			
01/19/2024			
02/02/2018			



OVERALL MANAGEMENT : MY WORK / TASKS

One consolidated page to view all the work for a user

My Work

10/20/2025

Upcoming Schedule

Date	Day	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM
10/20/2025	Monday												
10/21/2025	Tuesday												
10/22/2025	Wednesday												
10/23/2025	Thursday												
10/24/2025	Friday												
10/25/2025	Saturday												
10/26/2025	Sunday												

Upcoming Appointments

Date	Fixed Appt.	Block Appt.	Case	Customer	Type	Status
10/20/2025	9:00 AM to 10:00 AM		1234567	ISIDRO WOLFENDEN		Scheduled
10/22/2025	9:00 AM to 10:00 AM		1234567	ISIDRO WOLFENDEN		Scheduled

New Assignments

Case Number	Primary	Program	Status	Application Date	Auth Date	RE Date	CFS
SCCC3E5	CROSIER, DILLION 66M	WT	Pending	05/09/2012			
SCCC3E5	CROSIER, DILLION 66M	KG	Pending	10/01/2025			
SCCC3E5	CROSIER, RANDLE 65F	MC	Pending	10/01/2025			
SCCC3E5	CROSIER, RANDLE 65F	CW	Pending	04/09/2012	09/04/2013	02/2014	

Upcoming/Overdue Tasks

Due Date	Case	Program	Category	Type/Sub-Type	Status	Language
10/20/2025	SCCC3E5	CF	Self Service Portal Communications	BIC Exception	Assigned	English
10/21/2025	SCCC3E5	CW	Self Service Portal Communications	BIC Exception	Assigned	English
10/25/2025	SCCC3E5	CF	Self Service Portal Communications	BIC Exception	Assigned	English
10/25/2025	SCCC3E5	CW	Self Service Portal Communications	BIC Exception	Assigned	English
10/25/2025	SCCC3E5	CF	Self Service Portal Communications	BIC Exception	Assigned	English

e-Messages

Type	Status	Subject	Created Date	Last Updated	Case Number
Message	Received	e-Message 1	05/31/2025 11:11 PM	10/20/2025 11:11 PM	2148762
Message	Received	e-Message 2	05/31/2025 02:56 PM	10/22/2025 02:57 PM	2092659
Message	Received	e-Message	05/30/2025 06:14 PM	10/22/2025 06:14 PM	0297015
Message	Received	e-Message	05/30/2025 06:07 PM	10/25/2025 06:08 PM	0297015
Message	Received	e-Message	05/30/2025 12:44 PM	10/25/2025 06:08 PM	0228629
Message	Received	e-Message	05/29/2025 11:11 PM	10/25/2025 06:08 PM	0220313
Message	Received	e-Message	05/29/2025 11:06 PM	10/25/2025 06:08 PM	0220313
Message	Received	e-Message	05/29/2025 01:58 AM	10/25/2025 06:08 PM	2100181
Message	Received	e-Message	05/19/2025 12:01 PM	10/25/2025 06:08 PM	2065524
Message	Received	e-Message	05/19/2025 09:45 AM	10/25/2025 06:08 PM	2118870



ADMIN MANAGEMENT

OBJECTIVE
















Provide Counties with tools to make the system unique to match their needs for optimized functionality and use.

KEY CHANGES

- ♪ Introduced **new worker capacity configurability** that aligns workload distribution with real-time workloads and allows user to set maximum workloads across different priorities.
- ♪ Established pages to create **configurable schedule categories** to align with County needs and increase control over worker schedules and how availability is seen.



ADMIN MANAGEMENT: SCHEDULE CATEGORY

Legend	
Available for Appointment	
Available for Appraisal	
Available for IN/ES	
Available for NC	
Appointment Scheduled	
Overlapping Appointments	
Not Specified	
Unavailable	
Lunch Hours	
Telecommuting Days	
Vacation Days	
Leave	
Desk Time	
MSUDRP	
Unavailable for Tasks	

Static legend and schedule categories



ADMIN MANAGEMENT: SCHEDULE CATEGORY

Counties can create unique schedule categories to align with their needs

Users can choose an availability type for their schedule categories

Schedule Category Detail

* - Indicates required fields

Edit Close

Title: *
Available for ES/IN

Color: *
Yellow

Begin Date: *
10/01/2025

Display on Daily Availability Pop-Up: *
Yes

Description:

Availability: *
Available

End Date:

Appointment Categories *

Category	Type	Flexible Block Appointment	ES/IN
GA/GR Intake Interview			✓
General Appointment	Telephone Intake Interview	✓	✓
Intake Interview			✓

Edit Close

Users can choose the appointment categories for which schedule categories are available



ADMIN MANAGEMENT: CASELOAD CAPACITY

No Original State

Configurations can be set up for the whole County, Office, or Unit

There are different priorities of workers so that capacities can vary across different groups of workers

Counties can specify Assignment Capacity for their workers

This will be utilized in a new page to select workers for assignment and in workload assignment logic

Caseload Capacity Configuration Detail

*- Indicates required fields

Save Save and Apply to All Cancel

Title: * **Office: *** **Unit:**

Daily Assignment Capacity

Worker Priority	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
High	<input type="text" value="10"/>	<input type="text" value="10"/>	<input type="text" value="10"/>	<input type="text" value="10"/>	<input type="text" value="10"/>	<input type="text" value="10"/>	<input type="text" value="10"/>
Medium	<input type="text" value="5"/>	<input type="text" value="5"/>	<input type="text" value="5"/>	<input type="text" value="5"/>	<input type="text" value="5"/>	<input type="text" value="5"/>	<input type="text" value="5"/>
Low	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>

Monthly Assignment Capacity

Worker Priority	Monthly Capacity
High	<input type="text" value="200"/>
Medium	<input type="text" value="100"/>
Low	<input type="text" value="50"/>

Save Save and Apply to All Cancel





ORGANIZATIONAL CHANGE MANAGEMENT

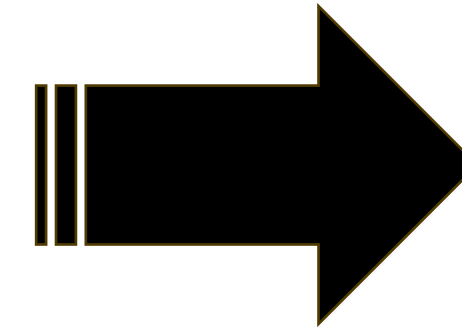
Key County Preparation Activities for Workload Management

Phase 1 (Release 26.05) and Phase 2 (Release 26.09)

Key Activities

Resources Delivered

CHANGE IMPACT ASSESSMENT

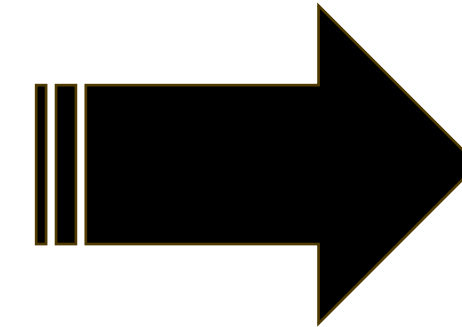


Tailored communications to County Staff detailing what is changing

Direct connect with Regional Managers to provide detailed insights on what is changing and resources to expect

Direct connect with Regional Managers to provide detailed insights on what is changing and resources to expect

ENHANCED DEMONSTRATIONS

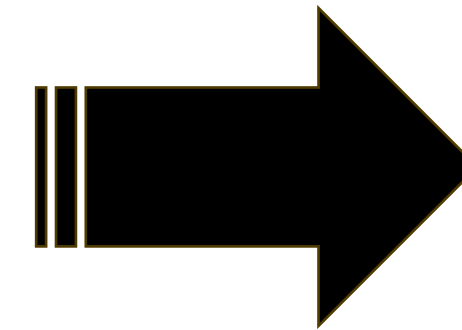


Recorded walkthrough of system features

Forum for County staff to ask questions

Recordings and FAQs accessible via Web Portal

TRAINING DEVELOPMENT



58 Online Help Pages

31 Web Based Trainings

19 Job Aids

4 Quick Guides





PHASE 1 GO-LIVE AND NEXT STEPS

PHASE 1 GO-LIVE AND NEXT STEPS

County Feedback

♪ We Heard You

- Engaged with counties through office hours to gather feedback
- Implemented priority fixes

♪ What's Next

- Incorporating feedback with additional enhancements in upcoming releases: 26.07, 26.09, 26.11, 27.01
- Highlights for upcoming releases:

26.07

Enhancement to Phone Number field on Customer Appt Detail

26.09

Incorporate Appointment Dots on Scheduling Assistant

26.11

Make Workload Reassignment 'Title' field dynamic

27.01

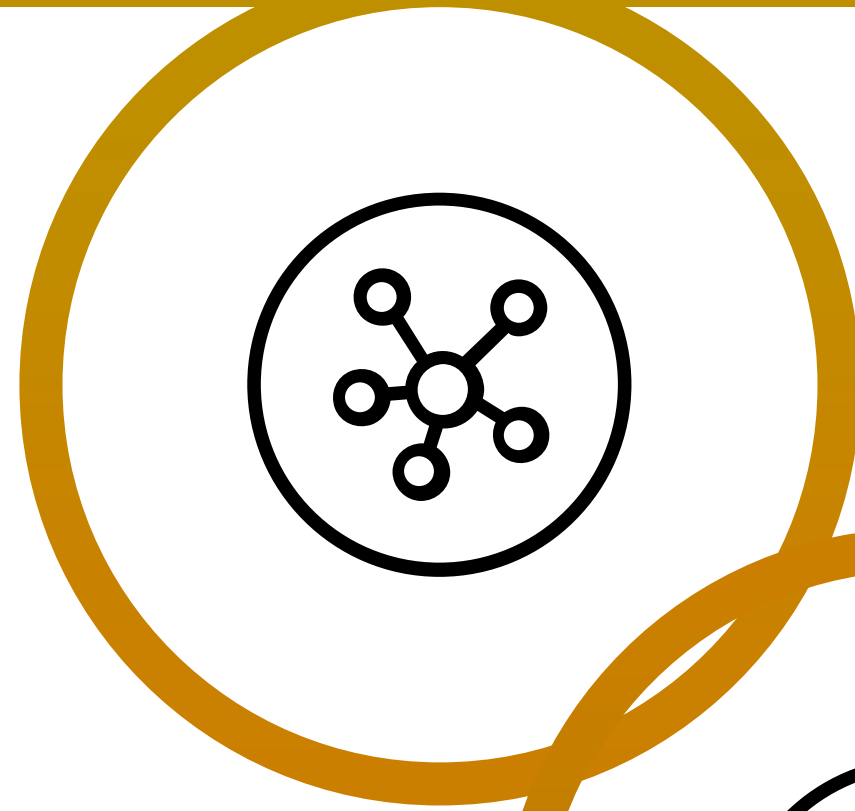
Generate New Worker Letter via Workload Assignment Upload





PHASE 2 OVERVIEW

PHASE 2 FUNCTIONAL AREAS



Workload Prioritization

Enhance operational efficiency by enabling configurable prioritization that ensures the highest-value cases are assigned first



Appointment Tasks

Improve operational precision by distributing appointment tasks based on when they occur, separating them from other work and using configurable rules to ensure tasks reach the right workers at exactly the right time



Reports

Elevate data-driven decision-making by delivering new reports and dashboards that provide clear visibility into enhanced appointment, scheduling, and workload processes



WORKLOAD PRIORITIZATION

No Current State

Can create multiple different Reassignment Prioritization Detail records

Set a hierarchy of priority by which programs should be reassigned when conducting workload reassignment

Set custom rankings for programs, application sources, languages, and program statuses

Reassignment Prioritization Detail

* Indicates required fields

Save Cancel

Title: *

Prioritization Method 1

Description:

Reassignment Prioritization Method Ranking

Ranking	Method
1	Prioritize by Custom Program Ranking
2	Prioritize by Custom Application Source Ranking
3	Prioritize by Custom Language Ranking
4	Prioritize ES/IN
5	Prioritize Oldest Application Date
6	Prioritize Earliest RE Due Date
7	Prioritize by Custom Program Status Ranking
8	Prioritize Earliest Report Due Date

Remove

Custom Application Source Ranking

Ranking	Application Source
1	In Person
2	Pre-Release County Jail
3	College
4	CalHEERS
5	Self-Service Portal
6	C4Yourself
7	CMIPS
8	Probation
9	Outreach
10	Child Welfare Services

Remove

Custom Language Ranking

Ranking	Language
1	English
2	Spanish
3	Arabic
4	American Sign Language
5	German

Remove

Custom Program Ranking

Ranking	Program
1	CalFresh
2	Medi-Cal
3	CalWORKS
4	Cal Learn
5	GA/GR

Remove

Custom Program Status Ranking

Ranking	Program
1	Pending
2	Active
3	Deferred

Remove

Reassignment Prioritization Method Ranking

Ranking	Method	
1	Prioritize by Custom Program Ranking	
2	Prioritize by Custom Application Source Ranking	
3	Prioritize by Custom Language Ranking	
4	Prioritize ES/IN	
5	Prioritize Oldest Application Date	
6	Prioritize Earliest RE Due Date	<input type="checkbox"/> Include Past RE Due Dates
7	Prioritize by Custom Program Status Ranking	
8	Prioritize Earliest Report Due Date	<input type="checkbox"/> Include Past Report Due Dates

Remove Add

Custom Application Source Ranking

Ranking	Application Source
1	In Person
2	Pre-Release County Jail
3	College
4	CalHEERS
5	Self-Service Portal
6	C4Yourself
7	CMIPS II
8	Probation
9	Outreach
10	Child Welfare Services

Remove Add



APPOINTMENT TASKS

Customer Appointment tasks are pulled with all other task types with the Get Next functionality

The screenshot shows a web interface for 'My Tasks'. At the top left is the title 'My Tasks' and a 'Help' icon. Below the title are three filter sections: 'Staff: Judy Pratt', 'Worker ID: 36AS0001GY', and 'Display Mode: Standard'. On the right side, there is a 'Results per Page: 25' dropdown and a 'Search' button. A blue bar labeled 'Get Next' spans the width of the interface. Below this bar, there are two dropdown menus: 'Category: All' and 'Language:'. A 'Get Next' button is positioned to the right of the 'Category' dropdown.



APPOINTMENT TASKS

New section for **Get Customer Appointment** is a new section to specifically pull customer appointment tasks

This section is County Configurable and can be turned on or off

Counties can configure how early an appointment task may be released before the scheduled appointment time

The screenshot shows the 'My Tasks' interface. At the top, there are tabs for 'My Tasks', 'My Watchlist', 'Task Search', and 'My Banks'. Below this, there are fields for 'Staff: Finnegan Timhas Dewitt', 'Worker ID: 19AS001X00', and 'Display Mode: Standard'. A 'Search' button is on the right. Below these are two task sections: 'Get Next' and 'Get Customer Appointment'. The 'Get Customer Appointment' section is highlighted with a red box. It includes a 'Language' dropdown set to 'Spanish', a 'Bundle Case Tasks' dropdown set to 'Yes', and a 'Customer Appointment' button.

The screenshot shows the 'Task Settings' configuration window. It has 'Save' and 'Cancel' buttons at the top right. A legend indicates that an asterisk (*) denotes required fields. The settings are organized into a table with 'Description' and 'On/Off' columns. The 'Get Customer Appointment' row is highlighted with a red box. Below this row, there is a configuration field: 'Limit appointment tasks to arrive 7 Day(s) before appointment.' with 'Save' and 'Cancel' buttons at the bottom right.

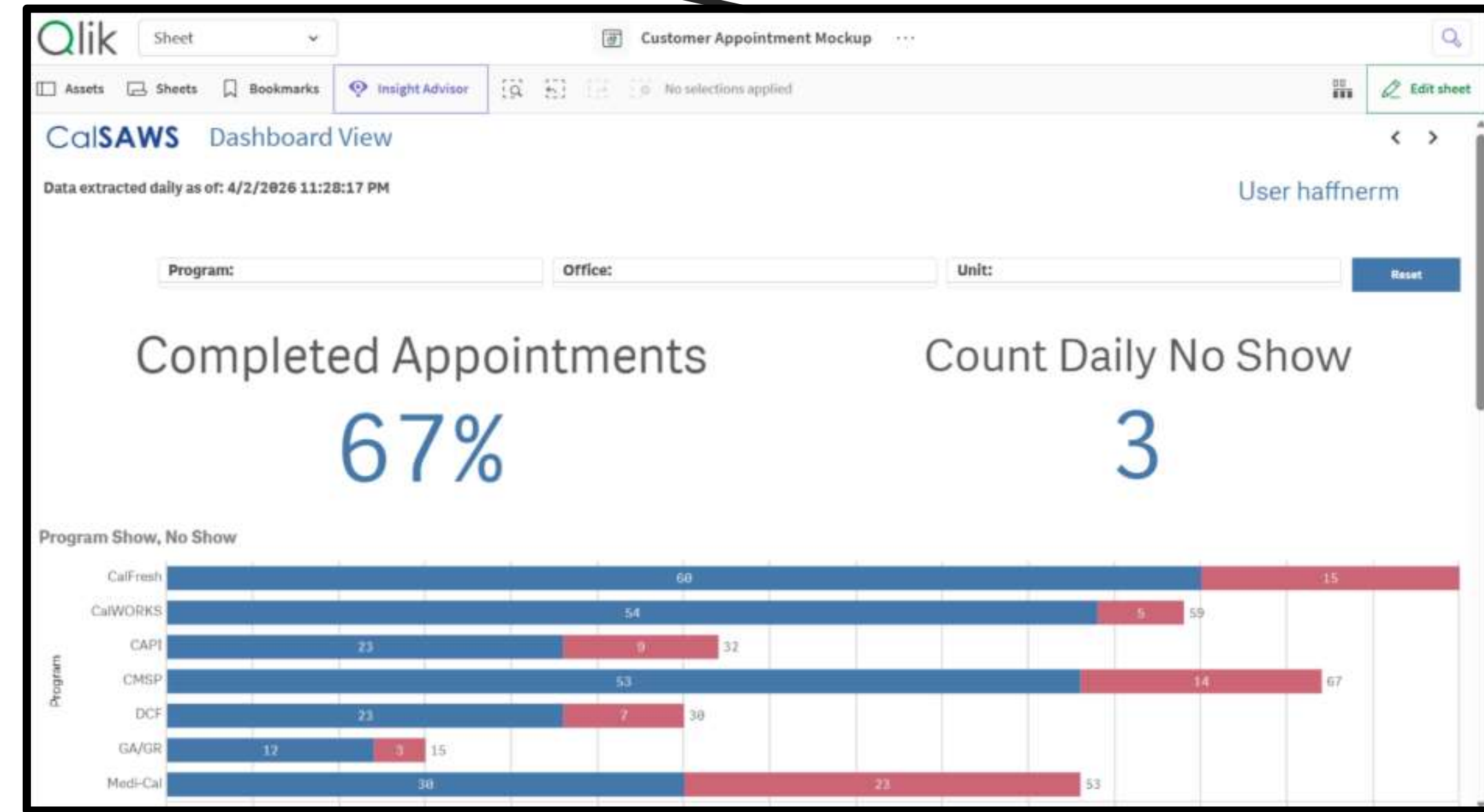
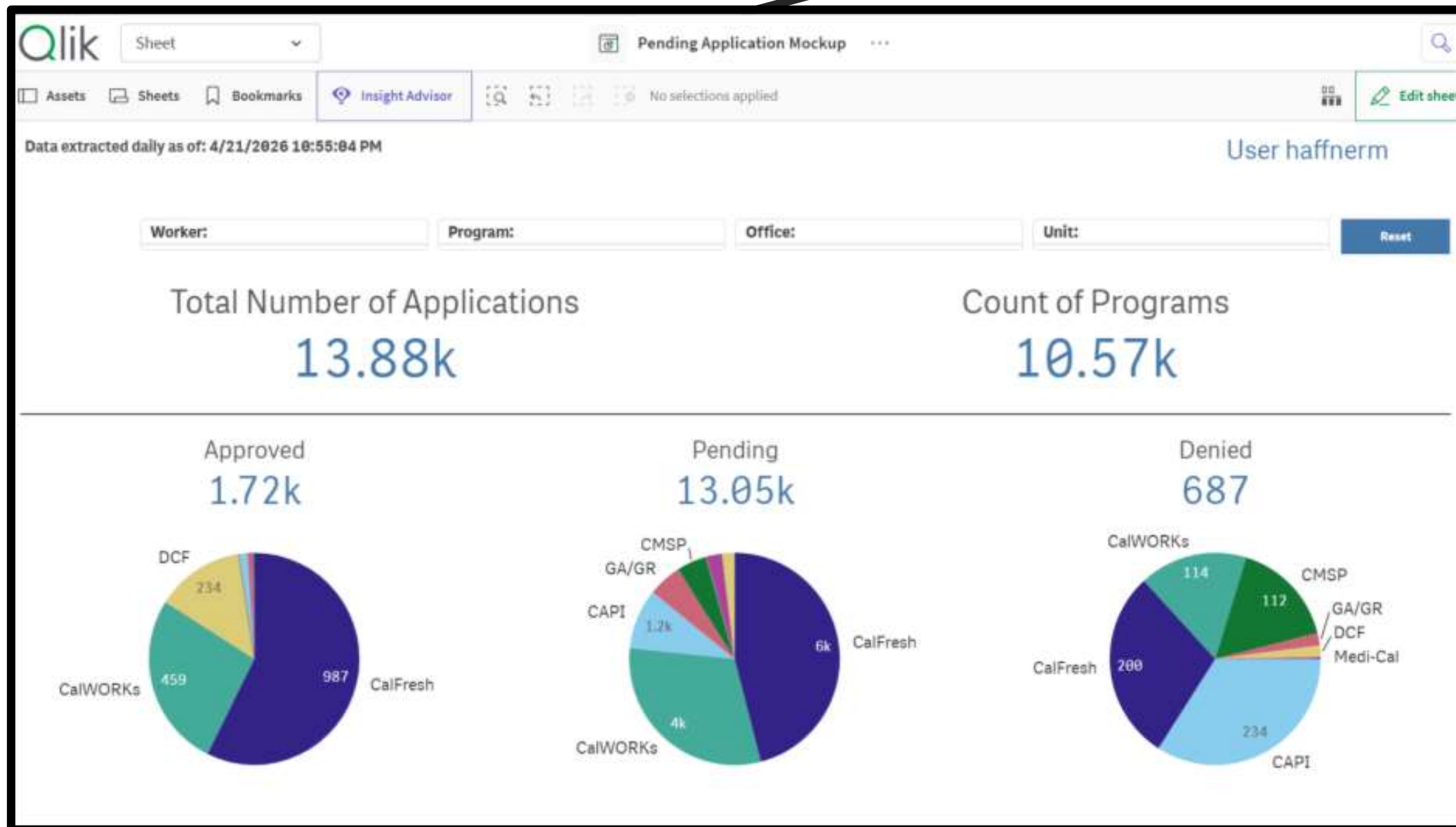
Description	On/Off
* Task Assignment Suggest Worker	<input type="radio"/> On <input checked="" type="radio"/> Off
* Bundle Case Tasks	<input type="radio"/> On <input checked="" type="radio"/> Off
* Get Next Limit	<input type="radio"/> On <input checked="" type="radio"/> Off
* Process Document Routing 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
Get Customer Appointment	<input checked="" type="radio"/> On <input type="radio"/> Off



REPORTS

FUTURE STATE

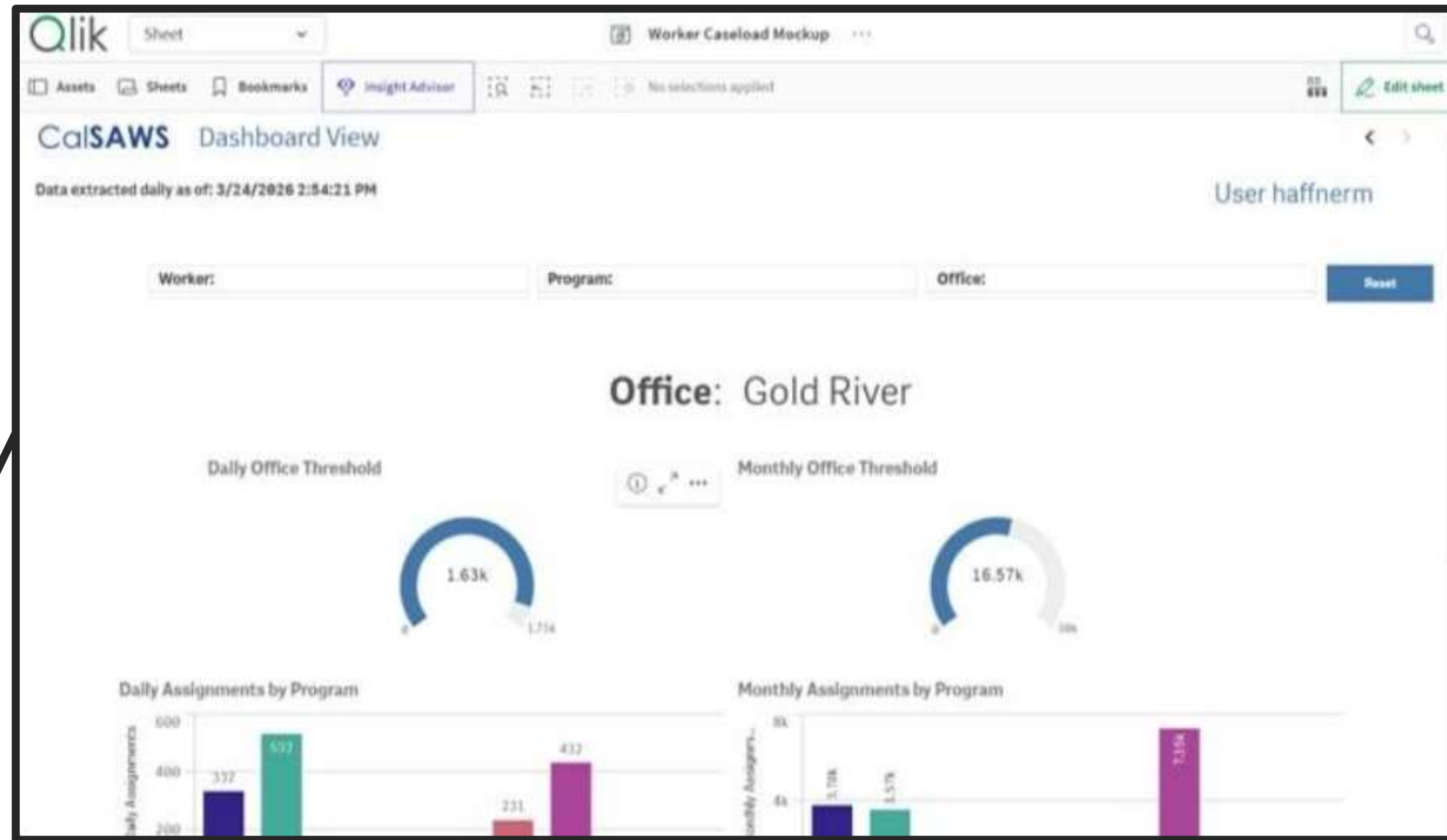
New Dashboards for Applications and Customer Appointments



REPORTS

FUTURE STATE

New Dashboards for Worker Availability and Worker Caseload.



CalSAWS Worker Availability
Data extracted daily as of: 4/21/2026 10:59:21 PM
User: haffnerm

Worker ID	Work Date	Time Interval	Availability Type	Appointment Category	Appointment Type	Appointment Status	Appointment ID
12345	1/1/2026	7:00:00 AM	Available	-	-	No-Show	-
12345	1/1/2026	7:15:00 AM	Available	-	-	No-Show	-
12345	1/1/2026	7:30:00 AM	Unavailable	General Appointment	Screening Only	No-Show	98454
12345	1/1/2026	7:45:00 AM	Unavailable	General Appointment	Screening Only	No-Show	98454
12345	1/1/2026	8:00:00 AM	Unavailable	General Appointment	Screening & Intake	-	2342134
12345	1/1/2026	8:15:00 AM	Unavailable	General Appointment	Screening & Intake	-	2342134
12345	1/1/2026	8:30:00 AM	Unavailable	General Appointment	Screening & Intake	-	2342134
12345	1/1/2026	8:45:00 AM	Unavailable	General Appointment	Screening & Intake	-	2342134
12345	1/1/2026	9:00:00 AM	Available	-	-	-	-
12345	1/1/2026	9:15:00 AM	Available	-	-	-	-
12345	1/1/2026	9:30:00 AM	Available	-	-	-	-



WE'D LOVE TO JAM WITH YOU!



ANY QUESTIONS ON WORKLOAD
ASSIGNMENT?





THANK YOU
FOR ATTENDING





Jazz

SET BREAK

BACK AT 3:45 PM FOR PLENARY SESSION 3