

Workload Management (Phase 2) Change Impact Resource Package

CalSAWS – Organizational Change
Management

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CalSAWS

Workload Management | Impacts Overview

The Workload Management system is undergoing additional updates aimed at enhancing features & capabilities for a user-centric design. This resource package is to inform on what is changing, and the impacts Counties may experience at Go-Live.

Workload Management Phase 2 (26.09) SCRs

CA-293075 WORKLOAD MANAGEMENT REDESIGN PHASE 2

Key Impact	Current State	Future State	Impacted Groups
New Reassignment Prioritization optional feature with impacts to: - System navigation - Reassignment Detail daily processes - System configuration	Reassignment Prioritization features and associated logic does not exist in the current System.	If enabled the new feature can: - Allow staff to create different methods for prioritizing reassignments - Update reassignment logic for the System - Search reassignment records	- County Administration - Clerical Staff - Supervisors/Leads - CalFresh Staff

CA-296462 CREATE NEW TASK SETTING FOR GET CUSTOMER APPOINTMENT

Key Impact	Current State	Future State	Impacted Groups
New optional task assignment setting with impacts to: - Customer Appointment task pulling - Get Next task pulling - System configuration	Get Next task setting pulls all tasks, including Customer Appointments.	If enabled the Get Customer Appointment task setting can: - Pull Customer Appointment tasks only for assignments - Exclude those tasks from Get Next, meaning Get Next would no longer distribute Customer Appointment tasks	- County Administration - Eligibility Workers - Supervisors/Management

CA-296514 WORKLOAD MANAGEMENT REDESIGN PHASE 2 - REPORTS

Key Impact	Current State	Future State	Impacted Groups
Four new dashboards & reports: - Application Dashboard - Customer Appointment Dashboard - Worker Availability Report - Worker Caseload Dashboard	Qlik does not have dashboards or reports for: - Application Dashboard - Customer Appointment Dashboard - Worker Availability Report - Worker Caseload Dashboard	New dashboard & report features: - Key performance indicators (KPIs) - Charts - Filtered data - Single view to track worker's availability & schedule	- Supervisors/Management - County Administration - District Leadership - County Leadership



WHAT IS CHANGING SUMMARY

Reprioritization Feature Introduced

Reassignment Prioritization is a new feature Counties can choose to incorporate into their reassignment workflow.

For the Counties that choose to adopt the reprioritization feature, staff will be able to update their daily processes to include prioritization in their workload reassignments.

Updates to New Program Details Page

A new section will be added to display when CalFresh is a selected program and will correspond with the Expedited Service section on the CalFresh Detail Page.

Updates to Scheduling Assistant Page

Dot/circle indicators will be added to the Scheduling Assistant page to show when appointments are scheduled (black dot/circle) or overlapping (red dot/circle) during time slots*, similar to the Office Schedule page.

**Cancelled appointments will not be shown.*

IMPACTS DASHBOARD

KEY IMPACT TAKEAWAYS

What Can be Prioritized?

Supervisors/Leads and Clerical Staff will be able to create different methods for reprioritizing program reassignments such as by program, program status, application source, language, ES/IN, oldest application, earliest RE due date, earliest report due date ranking.

Where to Find Reprioritization Feature

Configured Reassignment Prioritization records will be accessible from the Workload Reassignment Detail page and will have search features* that staff can filter by title & highest prioritization.

**Get Customer Appointment button will still be visible even if Counties do not set up the new feature, and result in No Data Found.*

Changes to Assignment Logic

The Reprioritization Assignment feature will impact the Workload Reassignment system logic.

The new Intake logic will assign cases to workers with the lowest Daily Caseload Count and based on Assignment Priority (high, medium, low) associated with the Worker ID.

ADDITIONAL INSIGHTS

Impacted Stakeholder Groups

- County Administration
- Clerical Staff
- Supervisors/Leads
- CalFresh Staff

Level of Impact

High Impact

- Counties to choose to adopt the feature and configure the System to enable reprioritization for staff to use.
- Supervisors & Leads to adjust or introduce processes for determining reprioritization of reassignments.
- Supervisors & Management to communicate logic updates if staff are not currently briefed on the logic in today's system.

Low Impact

- Updates to New Programs Details Page and Scheduling Assistant Page.



IMPACTS DASHBOARD

WHAT IS CHANGING SUMMARY

New Task Setting Option

Get Customer Appointment will be a new task setting Counties can choose to turn on and use.

The Task Setting page will be updated to reflect the new setting, which will default to off at Go-Live.

How is this Different than Get Next?

This task setting will enable a button that only distributes customer appointment tasks, versus the Get Next button which can distribute all task types.

What Will Staff Experience at Go-Live?

If a County chooses to turn on this new task setting, the Get Next button will no longer pull Customer Appointment tasks and assign them to staff.

The Get Customer Appointment button will pull Customer Appointment tasks.

KEY IMPACT TAKEAWAYS

Enabling & Sub-Settings

The Get Customer Appointment setting will include a sub-setting for a limitation on how many days or hours in the future an appointment task can be distributed. If a limit is not set, there will be no limit on task distribution.

Separation from Get Next

This new functionality will allow staff to pull appointment tasks separately from other tasks. If staff click Get Next while this new setting is on*, they will not be assigned an appointment task.

**If the setting is not turned on there will be no changes.*

Where to Find The New Feature

The My Tasks page will be updated to reflect a new panel containing a Get Customer Appointment button. When pulling Customer Appointment tasks, the tasks will be assigned to the worker in recency order of oldest dates first for task, task due date, and task created date.

Please note, the new setting will not consider workers' individual schedule when assigning appointments.

ADDITIONAL INSIGHTS

Impacted Stakeholder Groups

- County Administration
- Eligibility Workers
- Supervisors/Management

Level of Impact

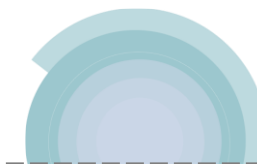
High Impact

- Counties to choose to adopt the feature and identify changes to their daily processes when turning the feature on.
- Eligibility Workers to navigate the new feature and remember the separation of Customer Appointments from Get Next for automated tasks.
- Supervisors & Management to communicate limitations of assignments and other setting nuances to staff before Go-Live.

Low Impact

- Added language & bundle case task dropdowns as they are existing settings that will also apply.

CA-296514 Workload Management Redesign Phase 2 - Reports



WHAT IS CHANGING SUMMARY

New Reporting Dashboards

Four new dashboards & reports will be introduced for staff to use:

- Pending Application Dashboard
- Customer Appointment Dashboard
- Worker Availability Report
- Worker Caseload Dashboard

What is the Data Refresh Schedule?

Data is on a three-hour refresh schedule, meaning, data presented in the reports will be near real-time.

What will the New Dashboards Include?

All three dashboards will have a dashboard & details view*. The Dashboard view will have key performance indicators (KPIs) and charts to visualize the data. The Details view will have filters and a table to view the additional details.

**The number of KPIs and the data presented will vary based on the parameters of the Dashboard.*

IMPACTS DASHBOARD

KEY IMPACT TAKEAWAYS

Worker Availability Report

Supervisors/Managers will now have a report with a single view to track worker's availability per their schedule* and will include filters & pivot tables.

**Worker must be active and a staff detailed record must be associated to show in the report.*

Leveraging the New Reporting Features

The new dashboards will offer Management the ability to visualize current outlook of pending applications, identify areas for scheduling improvements for customer appointments, and reduce manual data processing for reporting out.

New Filter will be Added to Existing Reports

Existing reports & dashboards will now have a District filter for applicable* Counties to use.

Current filters will remain unchanged.

**Counties that are not configured to fall within the district organization structure, the District filter will be blank.*

ADDITIONAL INSIGHTS

Impacted Stakeholder Groups

- Supervisors/Management
- County Administration
- District Leadership
- County Leadership

Level of Impact

High Impact

- County Administration to confirm Security Rights for applicable staff to utilize new reports & dashboards.
- Supervisors/Management to identify key use cases based on their County/District/Region's needs and impacts to their specific reporting processes.
- County Administration to ensure worker's position status is active and staff detail records are associated for report accuracy & usage .

Medium Impact

- Addition of the District filter as all other filters will remain unchanged.

Next Steps

- Ahead of the 26.09 Release, OCM will deliver one-pagers to further detail changes and provide additional resources for Counties
- Training resources will be available leading up to and after the 26.09 Release for the SCRs reflected in this Change Impact Resource Package
- County PPOCs & Regional Managers will receive a Readiness Checklist template to support County adoption at Go-Live

