

Impact Highlight: A Dedicated Way to Assign Customer-Appointment Tasks

If Counties choose to turn on this task setting, This task setting will enable a button that only distributes customer appointment tasks, versus the Get Next button which can distribute all task types to workers

- **Other Key Impacts Included in this SCR:** The new Get Customer Appointment feature will not consider the worker's individual schedule when assigning customer appointments
- **Who's Affected:** Eligibility workers in Counties that enable the setting, Supervisors/Leads to communicate setting nuances, and County Administration for Task Setting updates

CHANGE IMPACT BREAKDOWN

Feature	Current State		Future State
Task Settings	Task Settings currently does not have a Get Customer Appointment task distribution and tasks are distributed via Get Next	→	• Get Customer Appointment feature added to Task Settings • New task option defaulted to off • When turned on, a sub-setting can limit the number of days in the future appointments can be assigned to workers
My Tasks Page	My Tasks Page does not have a Panel for Get Customer Appointment task	→	• New Panel will have a Customer Appointment button language drop list • Included also bundle case tasks drop list (if applicable to the County)
Get Next Behavior	Distributes all tasks, including appointment tasks, when staff click the Get Next button	→	• If Get Customer Appointment is turned on in Task Settings, Get Next will no longer assign appointment tasks to the worker • All other Get Next tasks will not change
Automated Action Updates	Customer Appointment: Scheduled automated action does not currently align to the listed language on the Customer Appointment Detail Page	→	• Customer Appointment: Scheduled automated action will set to the language on the Customer Appointment Detail Page • If no language is set will set to language of Primary Applicant of the associated Case • If no language set, default will be English
No-Results Message	No message displays related to Customer Appointment tasks	→	• If there are no customer appointments available to reassign, or the task setting is not turned on, a message will display: Customer Appointment – No available Customer Appointment for reassignment