California Automated Response and Engagement System (CWS-CARES)
Resource Family Application (RFA) Project

Creating Tasks

To be used with **Module 4: Scheduling Meetings, Logging Activities, Creating Tasks, & Searching/Printing Records** Participant Guide

May 2022
Quick Guide 4c
Version 6.0

Revision History

Revision / Version #	Date of Release	Author	Summary of Changes
1.0		Melissa Smith	Initial draft
2.0		Melissa Smith	Updated Draft
3.0	01/21/2022	Lori Savageau	ADA Compliance Check
4.0	02/15/2022	Melissa Smith	Revised ADA Compliance Check
5.0	03/01/2022	Lori Savageau	Final ADA Revision and Review
6.0	06/02/2022	Melissa Smith	Ti.04 – Ti.06 enhancement updates

Creating Tasks

From the Application Overview page:

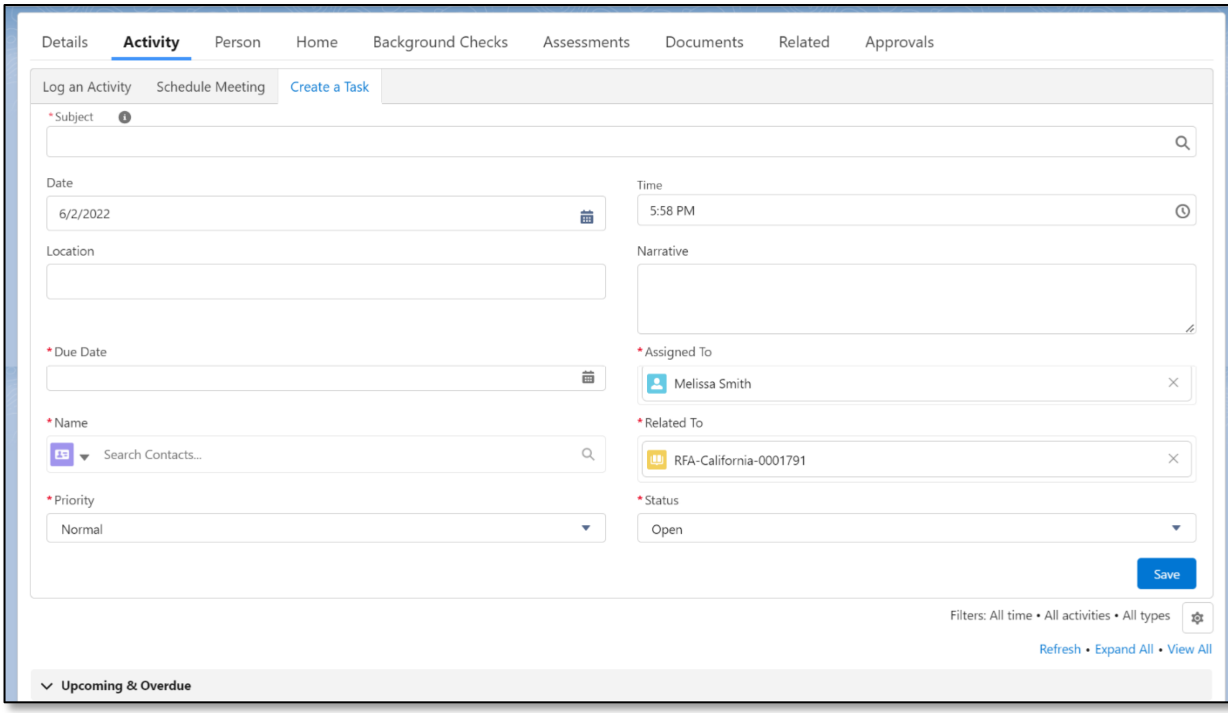
1. Click the **Activity** tab. -The **Activity** page displays.
2. Click the **Create a Task** sub-tab. - The **Create a Task** sub-tab displays.
3. Click in the **Subject** field and from the dropdown list, select one of the following:
   - **Application Information**
   - **Background Checks**
   - **Exemptions**
   - **Family Evaluation**
   - **Home Assessment**
   - **Orientation**
   - **Other**
4. The **Date** field will default to today's date. This is the date the task is being created. Change, if needed.
5. The **Time** field will default to the current time. This is the time the task is being created. Change, if needed.
6. In the **Location** field, enter the location the activity will take place, if appropriate. This field can be left blank.
7. In the **Narrative** field, enter *a brief description of task*.
8. In the **Due Date** field, enter the *date for when the task must be completed*.
9. The **Assigned To** field defaults to *your training ID*. This is who the task is assigned to. Change, if needed.

   NOTE: If you are creating a task for your applicant (e.g., attend a scheduled training, bring in specific documents, etc.) and you want this task to show in the Applicant Portal, you would assign this task to the applicant. Please refer to the **Quick Guide 12 – Applicant Portal Information for Workers** for more details.

10. Click the **Name** field, and from the dropdown list, select *the person the task is regarding*.

    NOTE: This is not who the task is assigned to, but rather who the task is about.

11. The **Related To** field defaults to the current application you are working on. Leave as is.
12. The **Priority** field defaults to **Normal**. Change to **High**, if needed.
13. The **Status** field defaults to **Open**. Change to **Completed**, if needed.
14. At the bottom right-hand corner, click the **Save** button. - The **Create a Task** sub-tab contracts.
15. At the bottom of the page, under the **Upcoming & Overdue** section, the task you just created displays.


Details
Activity
Person
Home
Background Checks
Assessments
Documents
Related
Approvals
Log an Activity
Schedule Meeting
Create a Task
*Subject
Date
6/2/2022
Time
5:58 PM
Location
Narrative
*Due Date
*Assigned To
Melissa Smith
*Name
Search Contacts...
*Related To
RFA-California-0001791
*Priority
Normal
*Status
Open
Save
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue