



## here's info needed to....

### *Assign a Worker at the Workgroup Node in the Intake View*

#### **How do you assign a workgroup to another worker without sending it to the Assignment Log at the Intake View?**

In some agencies, the worker who completes the Intake can assign the new primary worker to the assessment or case management workgroup. This process can be completed from the Intake View rather than sending the workgroup to the Assignment Log.

#### **Navigation:**

- 1.) Create the **Intake**—Select a Close reason of either Open for assessment-Intake complete or Open for Case Management Intake complete.
- 2.) Open the **Create case/workgroup Setup** screen.
- 3.) Under **Worker Assignment Change** field, select **Self assign** prior to completing Setup screen.
- 4.) Click on and expand the new created **Workgroup** node under the **Associated Workgroups** folder of the Intake completed while still in the Intake view.
- 5.) Click on and expand the **Staff Assignments** folder under the **Workgroup** folder.
- 6.) Click on the **Primary Worker's** node and enter the **Workers end date** and **Save**.
- 7.) Right-click on the **Staff Assignments** folder and select **New Primary Worker**.
- 8.) Click on the Worker drop-down menu and select the new primary worker's name.
- 9.) Enter the **Worker start date**.
- 10.) Click **Save**.
- 11.) Additional secondary workers can be entered at this time.

#### **Note:**

To continue working in the Assessment or Case Management workgroup, the current intake worker or former primary worker must add him/herself as a secondary worker.

Name	Worker Type	Start Date/Time	End Date
Maureen S ...	Primary	01/12/2010 07:44 AM	01/12/2010 07:52 AM
Stacey M Al...	Primary	01/12/2010 07:53 AM	
Maureen S ...	Secondary	01/12/2010 08:15 AM	

Staff Information

Worker: Alsdurf, Stacey M

Worker start date: 01/12/2010 07:53:02 am

Worker end date:

Primary Worker: Yes  No