

here's info needed to....

Transfer a Workgroup to Another Case

Occasionally workgroups are created in a **new** case when they could be added to an **existing** case.

How does a worker transfer a workgroup to an existing case?

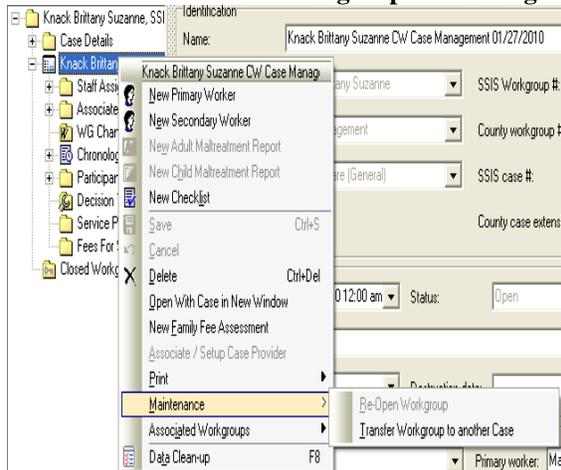
In some agencies, all workgroups are put under one case. The exceptions are Adoption/Guardianship and Licensing workgroups which **must** have their own cases. When there are workgroups in multiple cases, Worker A who is covering for Worker B may not know all the information. Best practice is to keep all workgroups in one case, when possible.

Note: To transfer a WG from one case to another the worker must have Reset Errors as function in their Role.

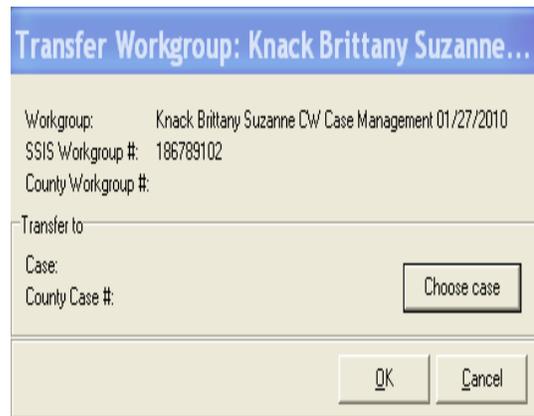
Navigation:

1. Select from the caseload list the workgroup that is to be transferred to another case.
2. Right-click and select **Maintenance** from the **Action** menu.
3. Select **Transfer workgroup to another case** from the slide over menu.
4. Click the **Choose case** button to display the caseload list.
5. Highlight the case you want the workgroup moved to. Click the **Select** button.
6. Click **OK** button on the Transfer Workgroup screen. The workgroup displays in the selected case.

Maintenance>Transfer workgroups to existing case



Transfer Workgroup>Choose Case



Caseload List>Select Case



Transfer Workgroup>OK

