# 23: Manage Case Assignment

Chapter Contents



This chapter explains how staff assign case managers to individuals and employers.

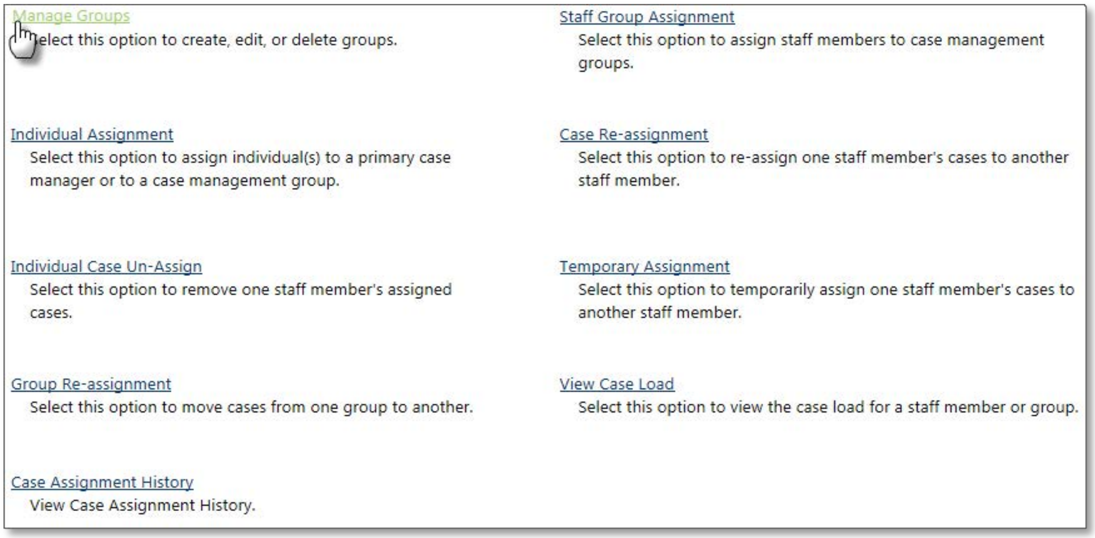
For **Individual Case Assignment**, the system allows supervisors or other authorized users to assign staff members to unique groups of case managers (for example, groups that manage specific programs). The system also allows staff to assign a specific case manager or case management group to individuals.

For **Employer Case Assignment**, the system allows supervisors or other authorized users to assign staff members to employers as their case managers. This assignment is made from the General Information tab of the employer's account. Once case managers are assigned, their assignments can be reassigned to another staff member. Case managers also can be reassigned temporarily from one staff member to another staff member.


*Manage Case Assignment Menu Options*

# Individual Case Assignment

The system allows supervisors or other authorized users to assign staff members to unique groups of case managers (for example, groups that manage specific programs, e.g., Wagner-Peyser, Workforce Innovation and Opportunity Act (WIOA), or Trade Adjustment Act (TAA)). Groups may be created according to LWIA or office designation. By design, a particular case manager or a case management group may be assigned to individuals. Select the **Individual Case Assignment** option in the ***Services for Workforce Staff*** menu (on the Navigation pane) to open the Individual Case Assignment menu screen (as shown in the following figure).




*Manage Individual Case Assignment Screen*

## Staff Permissions

The following describes staff permissions associated with case assignment:

- **Manage Groups** – Supervisors ***must*** create case management groups to utilize all Individual Case Assignment service options.
- **Staff Group Assignment** – Supervisors ***must*** assign staff members to case assignment groups to use the Individual Assignment, Case Re-Assignment, and Temporary Assignment options. For more information, refer to the section “Staff Group Assignment.”
  - Staff members who belong to a particular LWIA/region may only manage groups, staff, and individuals for that region.
  - The Manage Groups and Staff Group Assignment subcomponents are reserved for staff with Local Admin or State Admin privileges only.

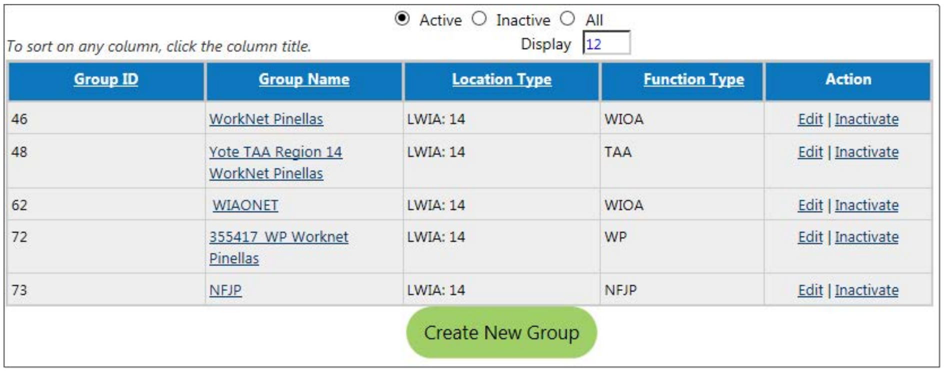
## Create and Manage Groups

The **Manage Groups** option is used to create, edit, and delete groups and group privileges. This will be the first step to manage the case assignment effort, as groups must be created before staff can assign case managers to those groups.

**Note:** *The local administrator will set up the security and access rights for certain staff to use this functionality. Only staff with administrator privileges may utilize this function.*

▶ **To open the Manage Groups screen:**

1. Click Manage Case Assignment ▸ Individual Case Assignment ▸ Manage Groups on the Navigation Menu·



◉ Active ○ Inactive ○ All

To sort on any column, click the column title. Display 12

| Group ID | Group Name | Location Type | Function Type | Action |
|---|---|---|---|---|
| 46 | WorkNet Pinellas | LWIA: 14 | WIOA | Edit \| Inactivate |
| 48 | Yote TAA Region 14 WorkNet Pinellas | LWIA: 14 | TAA | Edit \| Inactivate |
| 62 | WIAONET | LWIA: 14 | WIOA | Edit \| Inactivate |
| 72 | 355417 WP Worknet Pinellas | LWIA: 14 | WP | Edit \| Inactivate |
| 73 | NFJP | LWIA: 14 | NFJP | Edit \| Inactivate |

Create New Group

*Manage Groups Screen*

## Manage Groups

From the Manage Groups screen, staff can perform the following tasks:

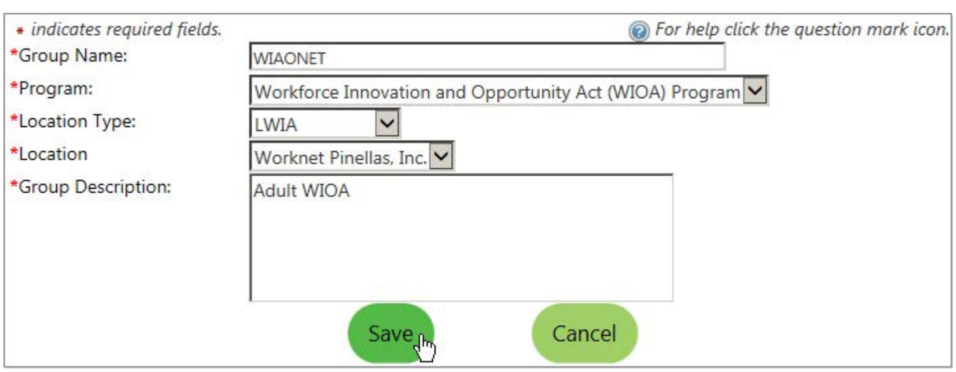
- **View –** Select a radio button at the top of the list to view Active, Inactive or all groups.
- **Details –** Click a link in the Group Name column to perform staff group assignment. For details, refer **to** the Staff Group Assignment topic that follows.
- **Edit** – Click the Edit link in the *Action* column to edit the group name, program name, location type, location, or group description.
- **Activate/Inactivate** – Click the Inactivate link in the *Action* column to remove the group from the list. To view groups that have been inactivated, select the *Inactive* radio button at the top of the screen. Staff then can click the Activate link to reactivate the group.
- **New** – Click the **Create New Group** button to add a new group.

## Create a Group

To create a new group, click the **Create New Group** button.

The Create a Group screen first displays only the *Group Name* and *Program* fields. As the staff member continues to make selections on the screen, additional fields will appear based on those selections. In this way, the system builds the screen dynamically based on user input.

- **Name** – Enter a name in the Group Name field.
- **Program** – Select the program from the *Program* drop-down list.
- **Location & Description** – Select the *Location Type* (LWIA or Office) and *Location*, and enter a *Group Description*.
- Click **Save** to save the group.




*Create a Group Screen*

Click **Cancel** only to exit the screen without saving the group.

# Staff Group Assignment

Supervisors use the **Staff Group Assignment** option to assign staff members to specific case management groups (WIOA, TAA, Wagner-Peyser, etc.) for access to certain case files. This is the second step in managing case assignments.

***Note****: Only staff with administrator privileges may utilize this function.*

To open the Staff Group Assignment screen, click **Manage Case Assignment ▸ Individual Case Assignment ▸ Staff Group Assignment** on the Navigation Menu.

The following figure displays a sample Staff Group Assignment screen:

| Group ID | Group Name | Location Type | Function Type |
|---|---|---|---|
| 46 | WorkNet Pinellas | LWIA: 14 | WIOA |
| 47 | 85642 | LWIA: 14 | WIOA |
| 48 | Yote TAA Region 14 WorkNet Pinellas | LWIA: 14 | TAA |
| 58 | VetReps | LWIA: 14 | WP |
| 62 | WIAONET | LWIA: 14 | WIOA |
| 72 | 355417 test WP Worknet Pinellas | LWIA: 14 | WP |
| 73 | NFJP | LWIA: 14 | NFJP |

*Staff Group Assignment Screen*

On the Staff Group Assignment screen, click the *Group Name* link to access a screen displaying a list of eligible staff members who can be assigned to this group:

**Note:** *Only active staff members who have privileges to work within a specific program (WIOA, TAA, Wagner-Peyser, etc.) for the selected group, and who belong to the group's geographic location, will display in the list.*

The following figure displays a sample Group Assignment List screen.

**Program:** WIOA
**Group Name:** WIAONET
**Location Name:** 14 - Worknet Pinellas, Inc.

Show Staff as: All

*To sort on any column, click the column title.*  Display 10

| Username | First Name | Last Name | Assign | Group Lead |
|---|---|---|---|---|
| dancfitz59 | Danny | Fitz | ☐ | ☐ |
| DHPREG14 No Privs. | sher | claus | ☐ | ☐ |
| FRANCOY | YULI | FRANCO | ☐ | ☐ |
| GSIADAJOHN (Cases: 0) - Inactive Staff | GSIJohn | ADATesting | ☑ | ☐ |
| GSIEFLINK (Cases: 1) | Ellis | Flink | ☑ | ☐ |
| GSILAMBOYC (Cases: 0) | gsi | CarmenLamboy | ☑ | ☐ |
| gsipmstaff | Elaine | Karas | ☐ | ☐ |

Assign Users to Group

Select a Different Group

*Staff Group Assignment List Screen*

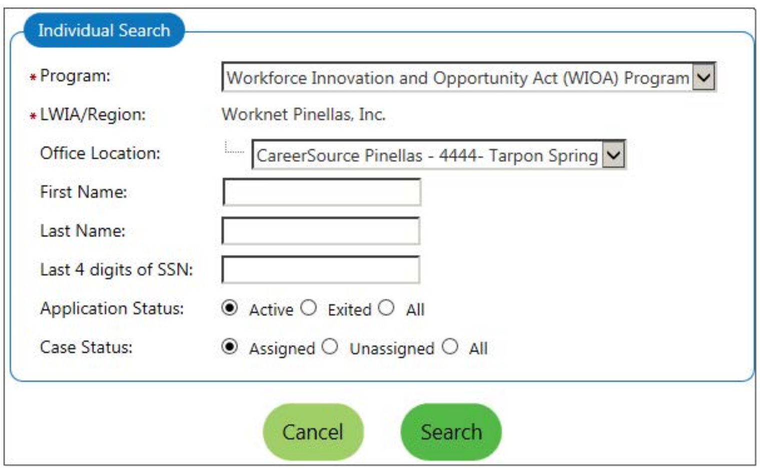
- To filter the list of staff, select an option (Active, Inactive or All) from the *Show Staff as* drop-down list.
- To assign a staff member to the group, click the desired checkbox in the *Assign* column. Staff must assign one person as the group lead by selecting one checkbox in the *Group Lead* column. If staff select more than one group lead, the system will display a warning message and will not save the assignments until only one group lead is selected.
- If the staff members that should be assigned are not on the list, click the Select a Different Group link to return to the Staff Group Assignment screen.
- After selecting all the users to assign to the group, click the **Assign Users to Group** button. The Staff Group Assignment screen will redisplay.

## *Individual Assignment*

The **Individual Assignment** option is used to assign a primary case manager or a case management group to an individual. Staff may use this feature to assign case managers or case management groups to *unassigned* cases. Staff will use the *Re-assignment* function to work with cases already assigned (as explained in the Case Reassignment section later in this chapter).

To assign a case manager or group to an individual, click **Manage Case Assignment ▸ Individual Case Assignment ▸ Individual Assignment** on the Navigation Menu. The first screen that opens allows staff to search for an individual to be assigned a case manager or group.

The following figure displays a sample Individual Case Assignment Search screen.

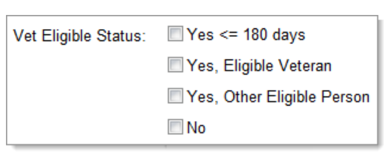



*Individual Case Assignment Search Screen*

To search for the individual, enter as much information as needed to perform the search. The *Program* and *LWIA/Region* must be selected; all other fields are optional.

Select a program to which the individual belongs. To narrow the search to only individuals who are not yet assigned, select the “Assigned” *Case Status* radio button. To access a specific individual, enter the First and Last Name, and/or the last four digits of the Social Security Number (SSN) and click **Search**.

***Note:*** *If Wagner-Peyser is selected, additional checkboxes will appear to allow staff to search by veteran status.*




*Veteran Status Checkboxes*

After clicking **Search** on the Individual Assignment – Search screen, the system displays the Case Selection screen.

| App ID | Username | First Name | Last Name | Assign | Case Manager | Status |
|---|---|---|---|---|---|---|
| 14193 | GSIWIAAP | Jerry | Doer | * | gsieflink | |
| 14194 | GSIJIMMYTESTCI | Jimmyb | James | | | |
| 14195 | GSIJSMITH | John | Smith | * | gsieflink | |
| 14196 | GSIWIAPREAPPTEST03 | Testme | Outta | | | |
| 14197 | GSIKENMORE | Ken | More | | | |

Assign Staff    Assign Group

Search Again

*Case Selection Screen*

To assign a case manager or group to an individual, click the checkbox in the *Assign* column and click the **Assign Staff** or **Assign Group** button. For details on both options, refer to the applicable topics that follow.

## Assign Staff

After clicking the **Assign Staff** button on the Case Selection screen, the system displays a list of eligible case managers.

| Username | First name | Last name | Group Name |
|---|---|---|---|
| gsilaura | Laura | Bhandari | Testing Group |
| gsilaura | Laura | Bhandari | LWIA Region 1 |
| GSICATHYSTAFF | Cathy | Staff | Testing Group |
| gsibdassinglocal | bonniel | dassingl | Testing Group |

Select a different case

*Individual Case Staff Assignment Screen*

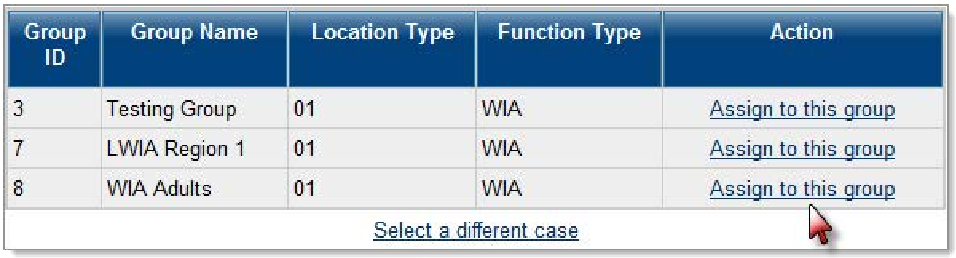
Case managers may belong to more than one case management group, so be certain to select the appropriate *Username* associated with the correct *Group Name* when selecting a case manager.

***Note:*** Only active staff members who have privileges to work within a specific program (WIOA, TAA, Wagner-Peyser, etc.) for the selected group and who belong to the group's geographic location can be selected.

To select a case manager to assign, click the *Username* link. The assignment will be completed, and the system will redisplay the Case Assignment Options screen.

## Assign Group

After clicking the **Assign Group** button on the Case Selection screen, the system displays a list of eligible case management groups.



| Group ID | Group Name | Location Type | Function Type | Action |
|---|---|---|---|---|
| 3 | Testing Group | 01 | WIA | Assign to this group |
| 7 | LWIA Region 1 | 01 | WIA | Assign to this group |
| 8 | WIA Adults | 01 | WIA | Assign to this group |
| Select a different case | | | | |

*Individual Case Group Assignment Screen*

To select a case management group to assign, click the desired link in the *Action* column. The assignment will be completed, and the system will redisplay the Case Assignment Options screen.

***Note:*** When a group is assigned, the system automatically assigns the case to the group lead. To reassign the case to another group member, use the Case Reassignment function described in a later section of this chapter.

## Case Assignment within Program Forms (In Context)

In addition to using the **Manage Case Assignment** options, as described within this chapter, staff may also use a case manager link in many program forms (e.g., the WIOA Application form, TAA Activity Enrollment form, WP Outcome form, etc.) to perform case assignments. The system will display the appropriate case assignment options based on the staff member's Profile. An example of the case manager link is shown in the following figure:


*Case Assignment Links on WIOA Enrollment Screen*

The system checks to ensure that the staff member has the necessary program privileges to manage this individual (if *Assign Me* is selected), that at least one case assignment group is active for this program, and at least one staff person has been assigned to that group (*Assign Case Manager*).

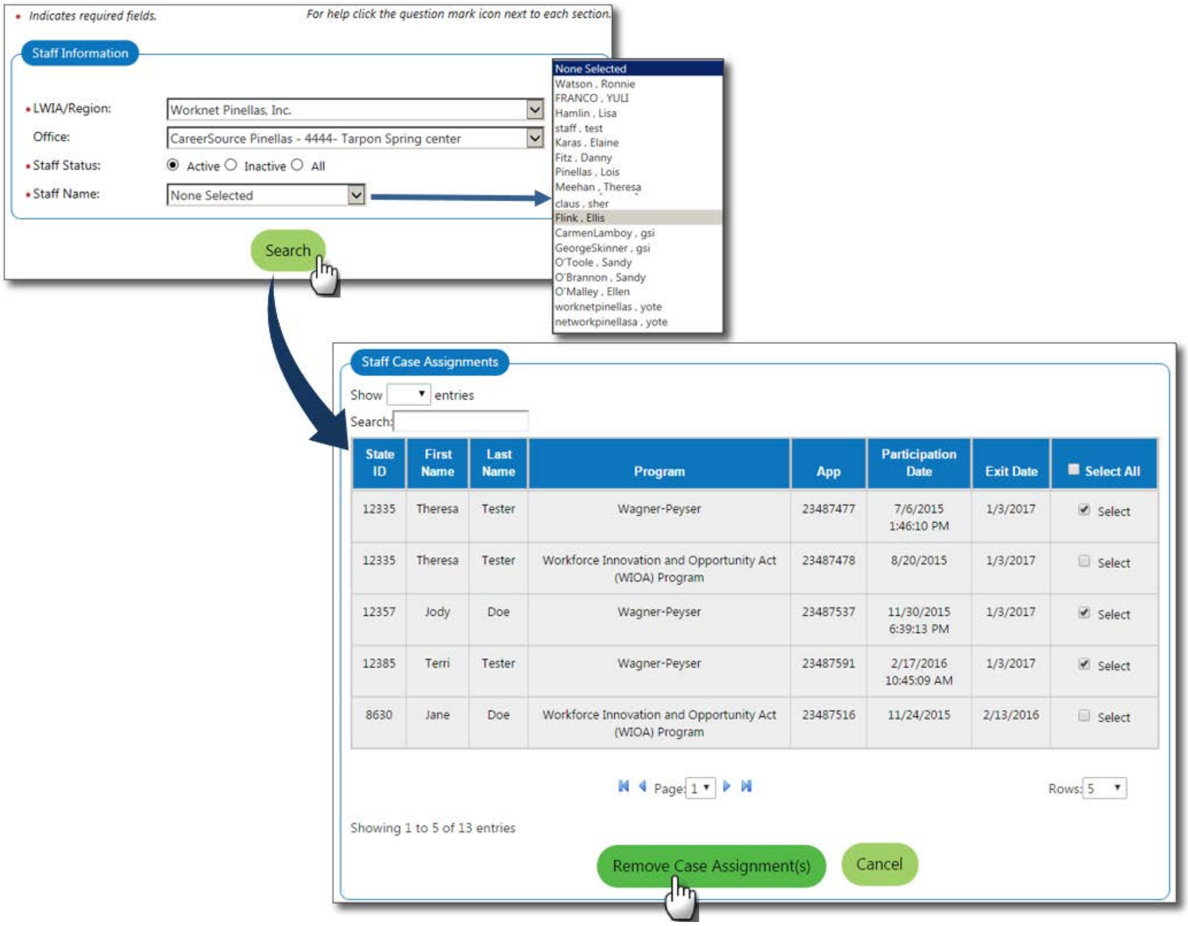
# *Individual Case Un-Assignment*

The **Individual Case Un-Assign** option is used to remove one staff member's assigned cases. It lets staff select and view the individuals assigned for one specific staff member, and then select individuals and remove their case assignments (i.e., un-assign them).

To un-assign an individual for a specific case manager:

- Click **Manage Case Assignment ▸ Individual Assignment** from the Navigation Menu.
- Select the link for the Individual Case Un-Assign option.

The first screen that opens lets the user select a staff member and search for their assigned cases (as shown in the next figure).




*Individual Case Un-Assign Search Screen (for Staff Member)*

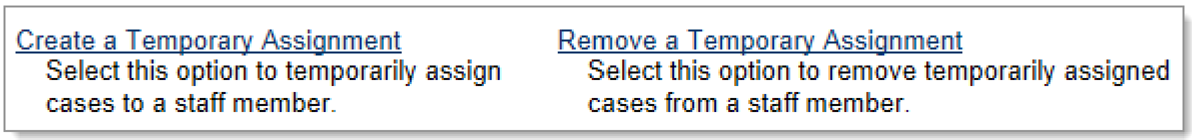
- Select the LWIA/Region, Office (optional), and Staff Status (defaulted to *Active*).
- Use the Staff Name drop-down list to select the staff member (a list is based on the previous choices).
- Click **Search** to see all the staff member's case assignments.
- Select the individuals to be unassigned (checkboxes in the last column).
- Click the **Remove Case Assignment(s)** button.

The screen will redisplay with the unassigned individuals removed.

# Temporary Assignment

Staff can use the **Temporary Assignment** option to remove cases from one case manager and assign them to another on a temporary basis. This feature is helpful if a case manager is away on medical leave or vacation.

To open the Temporary Assignment menu, click **Manage Case Assignment ▸ Individual Case Assignment ▸ Temporary Assignment** on the Navigation menu. There are two menu options – create or remove a temporary assignment.



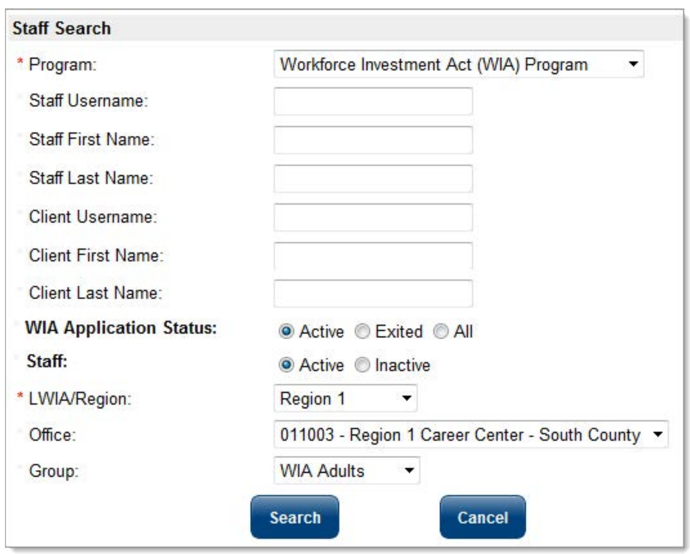

*Temporary Assignment Options Screen*

## Create a Temporary Assignment

▶ **To temporarily reassign the individual(s) in a case manager's caseload:**

1. Click Create a Temporary Assignment.

   A Staff Search screen will open to search for and select the case manager.




*Temporary Assignment Search Screen*

2. Select the program from the **Program** drop-down list.
3. To search for a specific staff person, enter the **Username**, **First**, and/or **Last Name**.
4. To search for the current case manager of a specific individual, enter the individual's **Username**, **First**, and/or **Last Name** in the **Client** fields.
5. If searching for the current case manager of a specific individual, select a radio button option to search by the individual's **WIOA Application Status** (Active, Exited, or All).
6. Select a radio button option to search for staff by status (Active or Inactive).
7. Select a **LWIA/Region** from the drop-down list. Select an office from the **Office** drop-down list, if desired.
8. Select a Case Management Group to which the staff member belongs, if any, from the **Group** drop-down list.

**9** Click the **Search** button to begin the search.

**10** On the Search Results screen, click the link in the *Staff Username* column to select the staff person.

| Group Name | Staff Username | First Name | LastName | Function | Cases |
|---|---|---|---|---|---|
| LWIA Region 1 | gsieflink | Ellis | Flink | WIA | 5 |
| LWIA Region 1 | STAFFTEST11 | STAFF | TEST11 | WIA | 2 |
| Testing Group | gsibdassinglocal | bonniel | dassingl | WIA | 1 |

*Temporary Assignment – Staff Search Results Screen*

The system will display a list of cases currently assigned to the selected staff member.

| Program | Staff Username | App ID | Client Username | FirstName | LastName | Re-Assign |
|---|---|---|---|---|---|---|
| WIA | STAFFTEST11 | 14188 | GSIJANEDOE | Jane | Doe | ☑ |
| WIA | STAFFTEST11 | 14192 | GSIOKENO | Oke | Eno | ☐ |

Temporarily assign to staff

*Temporary Assignment – Client Selection Screen*

**11** Click the **Re-Assign** checkbox for all cases to be reassigned to another case manager. Click the **Temporarily assign to staff** button to view a list of eligible staff persons, as shown in the following figure.

| Group Name | Username | First Name | LastName | Function |
|---|---|---|---|---|
| LWIA Region 1 | gsilaura | Laura | Bhandari | WIA |
| LWIA Region 1 | gsibdassinglocal | bonniel | dassingl | WIA |
| LWIA Region 1 | gsidanstaff | Dan | C | WIA |
| LWIA Region 1 | STAFFTEST123 | STAFF | ACCT123 | WIA |

Select different case(s)

*Temporary Assignment – New (Temporary) Case Manager Selection Screen*

**12** From this screen, select the staff member who will temporarily assume case responsibility by clicking the desired *Username* link. The system will return to the Case Assignment Options screen.

## Remove a Temporary Assignment

To reassign clients to their former case manager after they were temporarily assigned to a backup case manager, click **Temporary Assignment > Remove a Temporary Assignment**. The same Staff Search screen that is used to create a temporary assignment will open.

When searching for the current (temporary) case manager, the system will display a prompt to alert staff to the fact that the case manager has a temporary assignment (as shown in the figure below).

| Group Name | Staff Username | First Name | LastName | Function | Cases |
|---|---|---|---|---|---|
| LWIA Region 1 | gsieflink | Ellis | Flink | WIA | 1 |
| LWIA Region 1 | STAFFTEST11 Temp - 2646 | STAFF | TEST11 | WIA | 2 |

*Staff Search Results Screen Showing Temporary Assignment*

Use the same process described in the previous section ("Create a Temporary Assignment") to search for and select the current case manager, the individual(s), and the case manager to be reassigned to the case(s).

After selecting the current temporary case manager, the system displays the Case Selection screen. Click the *Remove* checkbox for the case(s) to be removed from temporary assignment and click the **Remove Temporary Assignment** button. The system will return to the Case Assignment Options screen.

| Program | Staff Username | App ID | Client Username | FirstName | LastName | Remove |
|---|---|---|---|---|---|---|
| WIA | gsibdassinglocal Temp - 2646 | 14188 | GSIJANEDOE | Jane | Doe | ☑ |

Remove Temporary Assignment

*Remove Temporary Assignment Screen*

## Case Reassignment

Use the **Case Re-Assignment** option to remove cases from one case manager and assign them to another. The process and screens used to do this are similar to those used to create a temporary case assignment, covered in the "Temporary Case Management" topic.

▶ **To reassign a case:**

1. Click **Manage Case Assignment ▸ Individual Case Assignment ▸ Case Re-assignment** on the Navigation menu. The same Staff Search screen that is used to create or remove a temporary assignment will open (see the "Temporary Case Management" topic).
2. Search for and select the current case manager.
3. From the next screen, select the individual(s) to be reassigned and click the **Reassign to staff** button (as shown below).

| Program | Staff Username | App ID | Client Username | FirstName | LastName | Re-Assign |
|---|---|---|---|---|---|---|
| WIA | gsieflink | 14147 | GSIMARIE | Ann | Marie | ☐ |
| WIA | gsieflink | 14193 | GSIWIAAP | Jerry | Doer | ☐ |
| WIA | gsieflink | 14195 | GSIJSMITH | John | Smith | ☑ |

Re-assign to staff

*Case Reassignment Screen*

4. On the next screen, select the staff member to reassign the case to by clicking the link in the *Username* column.

| Group Name | Username | First Name | LastName | Function |
|---|---|---|---|---|
| LWIA Region 1 | gsilaura | Laura | Bhandari | WIA |
| LWIA Region 1 | gsibdassinglocal | bonniel | dassingl | WIA |
| LWIA Region 1 | gsidanstaff | Dan | C | WIA |
| LWIA Region 1 | STAFFTEST123 | STAFF | ACCT123 | WIA |

Select different case(s)

*New Case Manager Selection Screen*

The individual is now reassigned to another case manager. The system will return to the Case Assignment Options screen.

**Note:** *The Case Manager Selection screen displays separate rows for the same case manager's regular assignments and their temporarily-assigned cases (as shown in the figure below).*

A Case Manager can be in multiple groups

| Group Name | Staff Username | First Name | LastName | Function | Cases |
|---|---|---|---|---|---|
| LWIA Region 1 | gsibdassinglocal | bonniel | dassingl | WIA | 1 |
| Testing Group | gsibdassinglocal | bonniel | dassingl | WIA | 4 |
| LWIA Region 1 | STAFFTEST11 | STAFF | TEST11 | WIA | 1 |
| LWIA Region 1 | STAFFTEST11 Temp - 2776 | STAFF | TEST11 | WIA | 1 |

A Case Manager may have both regular and temporary assignments.

*Case Reassignment Selection Screen*

## Group Reassignment

Staff can use the **Group Re-assignment** option to remove cases from one case management group and assign them to another group. To reassign case management groups,

1. On the Navigation menu, click **Manage Case Assignment ▸ Individual Case Assignment ▸ Group Re-assignment**.

   The first Group Reassignment screen initially displays only the *Program* field. As the staff member continues to make selections on the screen, additional fields will appear based on those selections. In this way, the system builds the screen dynamically based on user input.

2. **Program** – Select the program from the *Program* drop-down list. The *Location Type* field will appear.
   - **Location Type** – Select the *Location Type* (LWIA or Office). The *Location* field will appear.
   - **Location** – Select the location from the *Location* drop-down list.

3. Click the **Next** button to proceed.

**Program Search**

* Program: Workforce Investment Act (WIA) Program
* Location Type: LWIA
* Location: Region 1

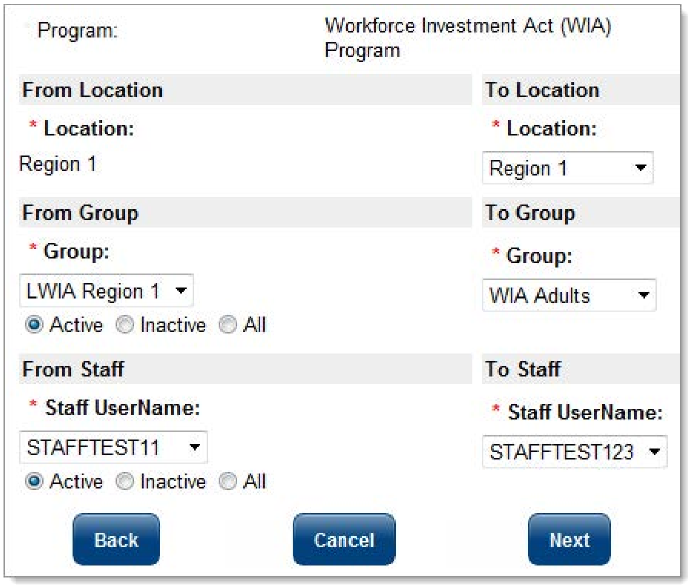
Next Cancel

*Group Reassignment – Program Selection Screen*

**4** On the next screen, indicate the group and staff the case is moving from and to.

- **From Group** – Select the group the case is assigned to currently from the drop-down list.
- **To Group** – Select the group the case is being reassigned to from the drop-down list.
- **From Staff** – Select the case manager the case is assigned to currently from the drop-down list.
- **To Staff** – Select the case manager the case is being reassigned to from the drop-down list.

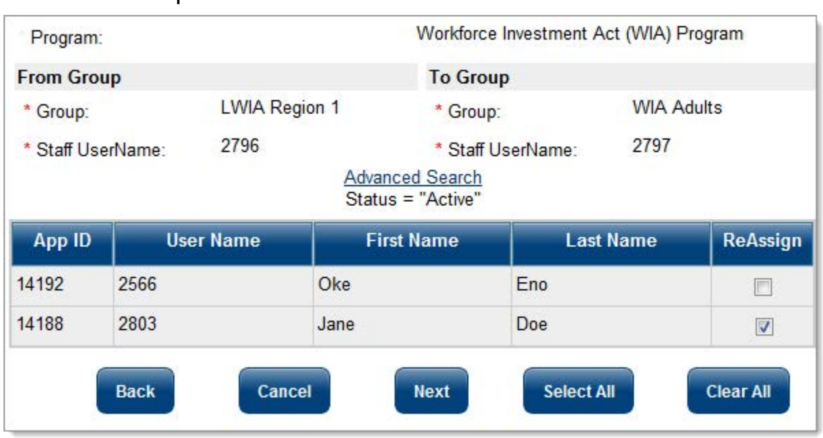
**5** Click the **Next** button to proceed.




*Group Reassignment – G Selection Screen*

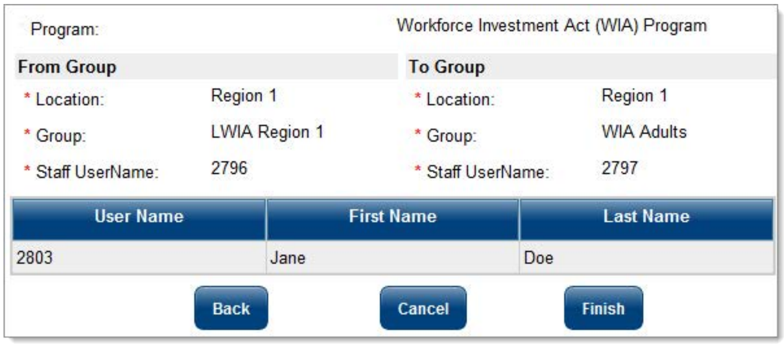
**6** On the Search Results screen that opens, select the checkbox(es) for the individual(s) (currently assigned to the selected group and staff member) who will be reassigned to the new group.

**7** Click the **Next** button to proceed.




*Group Re-Assignment Screen, Individual Case Selection*

**8** The final Group Reassignment screen displays the information that was just selected on the previous screens. If everything is correct, click the **Finish** button to finalize the reassignment. To make changes to any of the information, click the **Back** button (and continue clicking the **Back** button on the previous screens, as needed, to arrive at the screen that needs to be changed).




*Group Reassignment Summary and Confirmation Screen*

9 After clicking the **Finish** button, a pop-up box will confirm reassignment. Click **OK** to confirm.

# *View Case Load*

The View Case Load screen displays staff members' caseload statistics. From this screen, staff can drill down to the individuals handled by each case manager and from there, open the individual's Profile.

To open the View Case Load screen, on the Navigation menu, click **Manage Case Assignment ▸ Individual Case Assignment ▸ View Case Load**.

**Note:** *Staff members whose LWIA/Region is set to "State" in the Administration system can view all caseloads; those whose LWIA/Region is set to anything other than "State" will see only caseloads for groups to which they belong.*

## Filter

To filter the list on the View Case Load screen,

1 Click the [+] Show Filter Criteria link to open the filter fields:

- **Group** – Select a group from the drop-down list to display only individuals in that case management group.
- **Case Status** – Select the case status to display (All or Only Active) by selecting the appropriate *Cases Displayed* radio button.
- **Case Manager** – Select whose cases to display (All or Yours) by selecting the appropriate *Display* radio button.
- **Closed, Never Enrolled** – Select whether or not to display only individuals with closed applications (who never enrolled) by selecting the appropriate radio button.
- **Staff Status** – Select to show active or inactive (or both) by selecting the appropriate *Show Staff as:* radio button.

2 Click the **Filter** button to set the filter.


*Case Load Filters*

The following figure displays an example of the Case Load Staff Selection screen. The screen displays general data on the cases assigned to all case managers and groups (and the staff user's own cases), as determined by the filters selected at the top of the screen (if any).

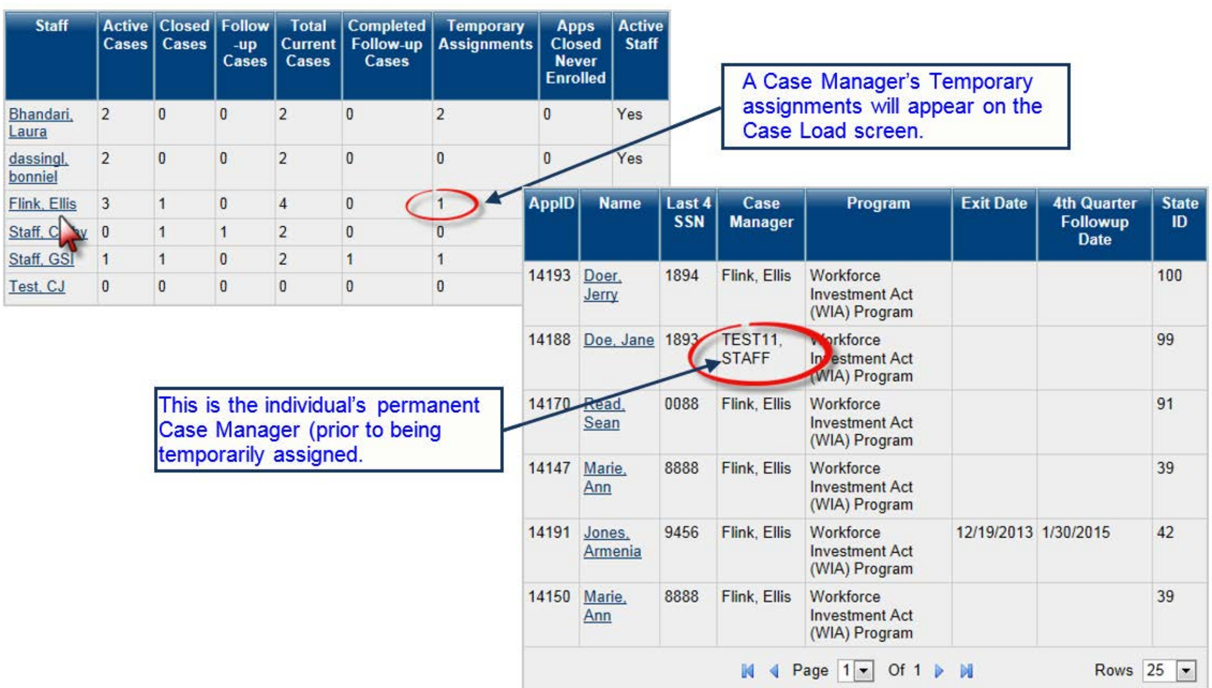
| Staff | Active Cases | Closed Cases | Follow -up Cases | Total Current Cases | Completed Follow-up Cases | Temporary Assignments | Apps Closed Never Enrolled | Active Staff |
|---|---|---|---|---|---|---|---|---|
| Bhandari, Laura | 2 | 0 | 0 | 2 | 0 | 2 | 0 | Yes |
| dassingl, bonniel | 2 | 0 | 0 | 2 | 0 | 0 | 0 | Yes |
| Flink, Ellis | 3 | 1 | 0 | 4 | 0 | 1 | 0 | Yes |
| Staff, Cathy | 0 | 1 | 1 | 2 | 0 | 0 | 0 | Yes |
| Staff, GSI | 1 | 1 | 0 | 2 | 1 | 1 | 0 | Yes |
| Test, CJ | 0 | 0 | 0 | 0 | 0 | 0 | 1 | No |

*Case Load – Staff Selection Screen*

The Case Load screen displays the following data:

- **Active Cases** – This is the number of active cases, i.e., the number not "exited" (by hard or soft exit).
- **Closed Cases** – This is the number of cases where the staff closed cases.
- **Exit Cases** – This is the number of cases where the individual has formally exited the program.
- **Follow-up Cases** – This is the number of cases where the follow-up dates have expired.
- **Temporary Assignments** – This is the number of cases temporarily assigned to this case manager.
- **Apps Closed Never Enrolled** – This is the number of individuals under assignment to that case manager who were never enrolled and whose applications were closed.
- **Active Staff** – This column indicates whether the staff member is active or inactive.

To view a case manager's caseload, click the link in the *Staff* column. This will open the Case Load screen for that case manager (as shown in the figure below).




| Staff | Active Cases | Closed Cases | Follow -up Cases | Total Current Cases | Completed Follow-up Cases | Temporary Assignments | Apps Closed Never Enrolled | Active Staff |
|---|---|---|---|---|---|---|---|---|
| Bhandari, Laura | 2 | 0 | 0 | 2 | 0 | 2 | 0 | Yes |
| dassingl, bonniel | 2 | 0 | 0 | 2 | 0 | 0 | 0 | Yes |
| Flink, Ellis | 3 | 1 | 0 | 4 | 0 | 1 | | |
| Staff, Cathy | 0 | 1 | 1 | 2 | 0 | 0 | | |
| Staff, GSI | 1 | 1 | 0 | 2 | 1 | 1 | | |
| Test, CJ | 0 | 0 | 0 | 0 | 0 | 0 | | |

| AppID | Name | Last 4 SSN | Case Manager | Program | Exit Date | 4th Quarter Followup Date | State ID |
|---|---|---|---|---|---|---|---|
| 14193 | Doer, Jerry | 1894 | Flink, Ellis | Workforce Investment Act (WIA) Program | | | 100 |
| 14188 | Doe, Jane | 1893 | TEST11, STAFF | Workforce Investment Act (WIA) Program | | | 99 |
| 14170 | Read, Sean | 0088 | Flink, Ellis | Workforce Investment Act (WIA) Program | | | 91 |
| 14147 | Marie, Ann | 8888 | Flink, Ellis | Workforce Investment Act (WIA) Program | | | 39 |
| 14191 | Jones, Armenia | 9456 | Flink, Ellis | Workforce Investment Act (WIA) Program | 12/19/2013 | 1/30/2015 | 42 |
| 14150 | Marie, Ann | 8888 | Flink, Ellis | Workforce Investment Act (WIA) Program | | | 39 |

Page 1 Of 1 Rows 25

*Case Load Screen*

The Case Load screen displays the individuals in the selected case manager's caseload, the programs in which they are enrolled, and any exit date for follow-up that applies.

Click the link in the *Name* column to open the individual's Staff's Profile screen from which staff can access the General Information, Case Management, and Report profiles, etc.

## Case Assignment History

The **Case Assignment History** menu option lets a staff member, with the necessary privileges, view all changes or reassignments that he or she made to individuals' initial case assignments. The **Case Assignment History** link opens a case assignment history table. Each time a case is assigned to a different case manager, or reassigned, the system writes a record to the case assignment history table.

When the staff member views this history, all assignment changes in the history table, made by that staff member, can be displayed.

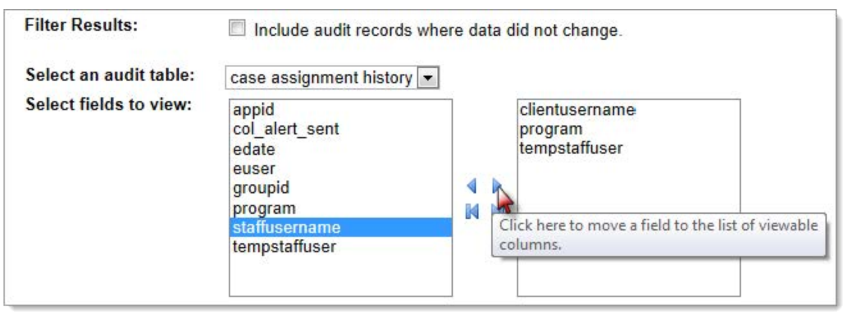
To open the Case Assignment History screen, on the Navigation Menu, click **Manage Case Assignment >Individual Case Assignment > Case Assignment History**.

The screen initially displays a table with four columns of information – the staff member's Username, the date the record was edited, the action taken, and the IP Address from which the action was taken.

| Edit User | Edit Date | Action | IP Address |
|---|---|---|---|
| GSISA0 | 5/15/2013 12:46:24 PM | Updated | 10.102.1.78 |
| GSISA0 | 5/15/2013 1:13:30 PM | Updated | |
| GSISA0 | 5/15/2013 1:27:15 PM | Updated | |
| GSISA0 | 5/15/2013 1:30:13 PM | Updated | 10.102.1.78 |
| GSISA0 | 5/16/2013 12:01:01 PM | Updated | |
| | | Updated | |

*Case Assignment History Screen – Initial View (Partial)*

Staff can select additional columns to view. To add a column of information to the table, click on an item in the *Select fields to view* field and click the right arrow to select it. The item will move into the box on the right. Continue selecting items to view, as needed. To select multiple items, hold the Control key down while selecting.




*Case Assignment History – Column Selection*

The table will refresh, showing the additional columns of information (as shown below). File changes are displayed in bold.

| Edit User | Edit Date | Action | IP Address | clientusername | program | staffusername | tempstaffuser |
|---|---|---|---|---|---|---|---|
| GSISA0 | 5/15/2013 12:46:24 PM | Updated | | 2587 | 3 | 2733 | |
| GSISA0 | 5/15/2013 1:13:30 PM | Updated | | **2555** | **2** | 2733 | |
| GSISA0 | 5/15/2013 1:27:15 PM | Updated | | 2555 | **3** | **2582** | |
| GSISA0 | 5/15/2013 1:30:13 PM | Updated | | 2555 | 3 | **2586** | |
| GSISA0 | | | | 2555 | 3 | **2582** | |
| | | | | | 3 | **2733** | |

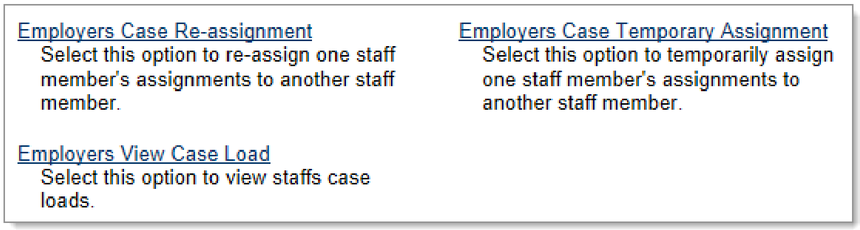
*Case Assignment History (Partial)*

# Employer Case Assignment

The system allows supervisors or authorized staff to assign a case manager to employers through the employer's General Information tab.

Once a case manager is assigned, the **Employer Case Assignment** menu option allows staff to reassign the case to other another staff member, either temporarily or permanently. The menu also includes an option to view case managers' caseloads.

**Note:** *Staff members whose LWIA/Region is set to "State" in the Administration system can work with all caseloads; those whose LWIA/Region is set to anything other than "State" can work with only caseloads for their own region.*




*Employer Case Assignment Screen*

## *Employer Case Assignment*

The system allows supervisors or authorized staff to assign a case manager to employers through the employer's General Information tab.

▶ **To open the employer's Profile:**

1 Assist the employer by selecting ***Manage Employers*** > **Assist an Employer** from the Navigation pane. Select the employer and open the General Information tab.

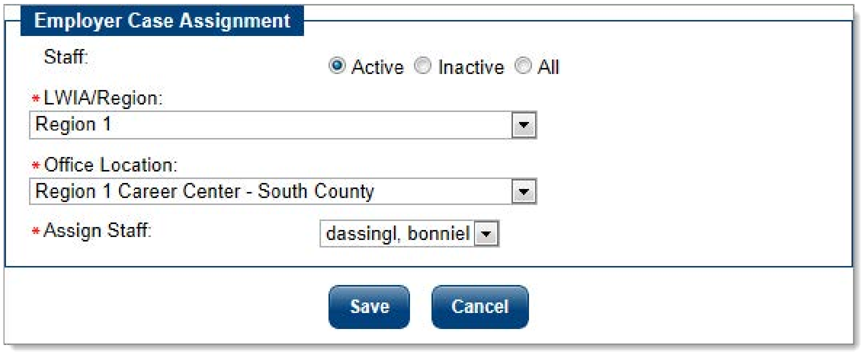
2 In the Staff Information section, click the Case Assignment link.


*Employer General Information Tab – Case Assignment Link*

3 On the following screen, click the Create New Assignment link (as shown in the figure below).


*Create New Assignment Link*

**4** On the following screen, select the LWIA/Region, Office and Staff person to be the employer's case manager from the drop-down lists. Click the **Save** button to save the assignment.




*Employer Case Assignment Screen*

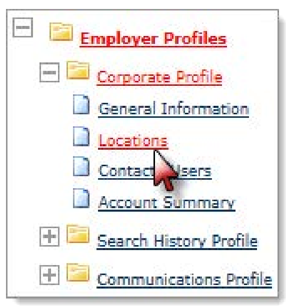
The screen will display the new case manager in the Case Assignment table (as shown below).

| Case Manager | LWIA/Region | Office | Temporary Assignment | View History | Action |
| --- | --- | --- | --- | --- | --- |
| dassingl, bonniel | Region 1 | Region 1 Career Center - South County | N/A | History | Delete |

*Employer Case Assignment Table*

## Employer Location Case Assignment

Staff can assign different case managers to each of the employer's locations, if needed. To do so, open the Locations Tab of the employer's Corporate Profile.

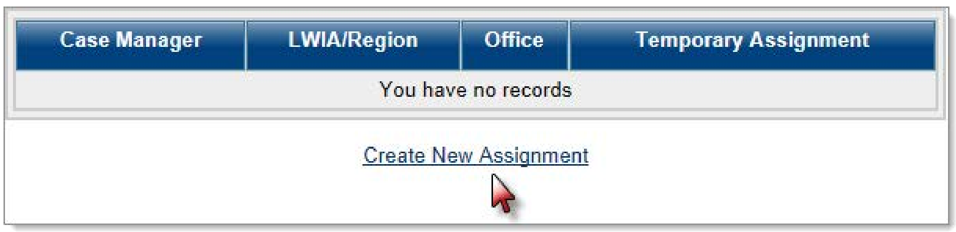



*Locations Link*

**1** In the list of Locations, click the corresponding View Assigned Case Manager link in the *Action* column for the location to be assigned a case manager.


*Locations Tab – View Assigned Case Manager Link*

2 On the following screen, click the Create New Assignment link (as shown in the figure below).




*Create New Assignment Link*

3 Continue to follow the steps as described in the previous topic ("Employer Case Assignment") to assign the location's case manager.

## Employers Case Reassignment

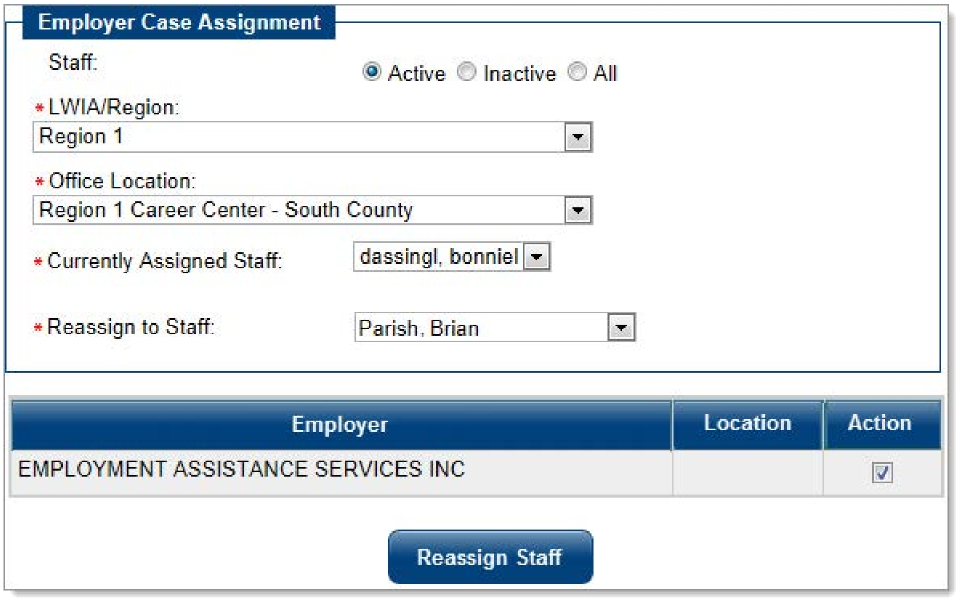
Staff can use the **Employers Case Re-Assignment** option to remove employer cases from one case manager and assign them to another. Staff must be assisting an employer to use the case reassignment option.

▶ **To reassign an employer's case manager:**

1 On the Navigation Menu, click **Manage Case Assignment** ▸ **Employer Case Assignment** ▸ **Employers Case Re-assignment**.

2 On the **Employers Case Re-Assignment** screen, select the LWIA/Region, Office and Currently Assigned Staff from the drop-down lists. Select the staff member to whom the employer will be assigned from the *Reassign to Staff* drop-down list.

The screen will update, and display a table with the employers who have the selected staff member assigned (as shown below). Select the checkbox in the *Action* column for the employer(s) to be reassigned. Click the **Reassign Staff** button to finalize the reassignment.




*Employer Case Reassignment Screen*

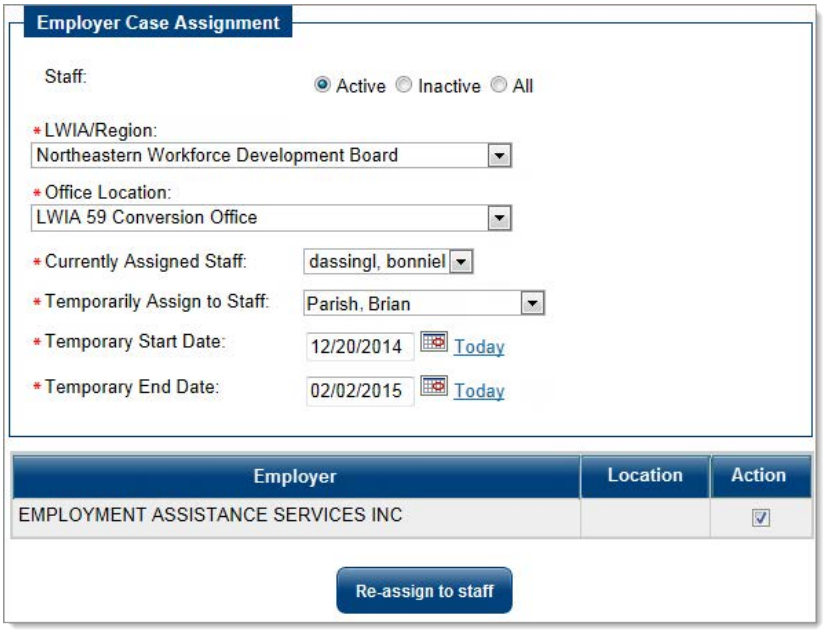
## *Employers Case Temporary Assignment*

The **Employers Case Temporary Assignment** option is used to remove cases from one case manager and assign them to another on a temporary basis. This feature is helpful if a case manager is away on medical leave or vacation. The Employers Case Temporary Assignment features work similarly to the reassignment feature in the Employers Case Reassignment topic.

▶ **To temporarily reassign an employer's case manager:**

1. Click Manage **Case Assignment** ▸ **Employer Case Assignment** ▸ **Employers Case Temporary Assignment**, from the left the Navigation Menu.
2. On the **Employers Case Temporary Assignment** screen, select the LWIA/Region, Office and Currently Assigned Staff from the drop-down lists.
3. Select the staff member to whom the employer will be assigned temporarily from the *Temporarily Assign to Staff* drop-down list.
4. Enter the first and last date the employer will be assigned to the temporary case manager by entering the Temporary Start and End dates.

   The screen will update and display a table with the employers who have the selected staff member assigned (as shown below).
5. Select the checkbox in the *Action* column for the employer(s) to be reassigned.
6. Click the **Reassign Staff** button to finalize the reassignment.




*Case Temporary Assignment Screen, Step 1*

## *Employers View Case Load*

The **Employers View Case Load** option displays staff members' caseload statistics. From this screen, staff can drill down to the employers handled by each case manager and, from there, open the employer's Profile.

To open the Employers Case Load screen, on the Navigation menu, click **Manage Case Assignment ▸ Employer Case Assignment ▸ Employers View Case Load**.

**Note:** *Staff members whose LWIA/Region is set to "State" in the Administration system can view all caseloads; those whose LWIA/Region is set to anything other than "State" will see only caseloads for groups to which they belong.*

The following figure displays an example of the Employer Case Load Staff Selection screen. The screen displays statistics on the cases assigned to all case managers and group.

- **Current Cases** – Total number of employer cases currently assigned to the case manager
- **Temporarily Assigned In (Temp In)** – Number of employer cases that are assigned temporarily to this case manager
- **Temporarily Assigned Out (Temp Out)** – Number of employer cases for this case manager that are assigned temporarily to another case manager
- **Total Cases** – Total number of case manager's Current and Temp In cases, minus the Temp Out cases

**Employee Case Assignment View Case Load**

*Select a LWIA/Region: Region 1

Select a Office Location: Region 1 Career Center - South County

Display: (•) All ( ) Only my assigned cases

Search

| Staff | Current Cases | Temp In | Temp Out | Total Cases |
|---|---|---|---|---|
| Bhandari,Laura | 1 | 0 | 0 | 1 |
| Staff,Cathy | 0 | 0 | 0 | 0 |
| C,Dan | 0 | 0 | 0 | 0 |
| Test,CJ | 1 | 0 | 0 | 1 |
| Flink,[illegible]llis | 0 | 0 | 0 | 0 |
| TEST11,STAFF | 0 | 0 | 0 | 0 |

1 2

*Employers View Case Load - Select Staff Screen*

To view a case manager's caseload, click the case manager's name link in the *Staff* column. This will open the Case Load screen for that case manager (as shown in the figure below).

| User ID | Company | Location | Temporarily Assigned in From | Temporarily Assignment Out | Temporary Assignment Ends on |
|---|---|---|---|---|---|
| 2554 | Dassing Employer | ALL | | | |
| 3021 | ER Employer | HQ | | | |
| 3021 | ER Employer | ER West | | | |

*Case Load Screen*

The Case Load screen displays the employers in the selected case manager's caseload with information on any temporary case assignments that may apply. If the employer has multiple locations that are assigned to the case manager, the locations will show in separate rows (as shown in the figure above).

Click the link in the *User ID* column to open the employer's Employer Profile screen, from which staff can access the General Information, Case Management, and Report profiles, etc.