



## ***Top 10 Assignment Tips***

- 1) Assignments identify the workers that are responsible for Cases and Providers.**
- 2) Assignments allow the assigned worker to access the Case or Provider from their desktop and allow the assigned worker to maintain and create Case and Provider work for these assigned Cases or Providers.**
- 3) Assignments also provide a description of the worker's responsibility within this case. This is defined by the Category, Type, Responsibility and Role.**
  - a. Category – Case or Provider
  - b. Type – Provides a description of Assignment
  - c. Responsibility – Provides a more detailed description of the Assignment. Responsibility filters based on Type.
  - d. Role – Primary, Secondary or Courtesy
    - i. Primary – One per Case or Provider
    - ii. Secondary – Unlimited allowed per Case and Provider
    - iii. Courtesy – Unlimited allowed per Case and Provider
- 4) Case Assignments can be at the Case level or Participant level.**
  - a. Participant level assignment can be created and maintained by utilizing the Participant view from the Desktop or Search.
- 5) Primary assignments are created at the Case level.**
  - a. Primary Case assignments do not require additional child assignments to indicate responsibility for each child in the Case.
  - b. Reports will imply a Primary child assignment for all children within the Case.
  - c. The Children Active Receiving In-Home or Out of Home Services Report (previously known as the Clients Active as Case Dependents – CACD) will display the worker with a Primary Case assignment as the Primary worker for each Child within the Case.
- 6) Secondary workers and Courtesy workers can be assigned at the Case or the Child level.**
  - a. Secondary and Courtesy assignments to the Case will allow the assigned worker to access the Case from their desktop and create case work.
  - b. In order for reports to apply the Secondary or Courtesy assignment for each child within the Case and apply performance to the Secondary or Courtesy worker, a Participant specific assignment is needed to each child.
- 7) Primary Investigator & Secondary Investigator Designation**
  - a. Each Investigation and Special Conditions Referral in FSFN allows the user to designate a Primary and Secondary Investigator responsible for this piece of work.
  - b. This designation does not create an assignment to the Case.



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- i. Designating an Investigator on this piece of work does not allow the worker access to the Case.
- ii. Upon reassignment of a Case, the supervisor will need to update the Primary investigator on the appropriate Investigation and/or Special Condition Referral.
- iii. Performance reports will utilize this designation to indicate the Investigator responsible for this Investigation or Special Conditions Referral.

### **8) Case Transfer Request**

- a. This request is a communication tool from Supervisor to Supervisor.
- b. Acceptance or Rejection of this request does not impact the Assignment to the Case.
- c. Upon Acceptance, an Assignment will need to be created to allow the new worker to access the Case from their desktop and create work for the Case.

### **9) Unit Supervisor's Implied Assignment**

- a. Unit Supervisors can view and maintain Case and Provider work for the workers within their unit.
- b. To create work for a Case or Provider assigned to a worker within their unit, the Unit Supervisor will need to create a direct assignment to the Case or Provider to create the new work. (exclusions – Case Notes, Provider Notes, Alerts & Case Transfer Request)

### **10) Assignments are Work Unit Assignment specific**

- a. If a user has a Profile in more than one unit, the Case and Provider assignment is created to one Unit assignment.
- b. The Case or Provider will appear on the desktop for that unit and can not be accessed when the user is logged into a different unit.
- c. The user can complete a Worker Search to view each Work Unit Assignment to determine which profile the Case or Provider is assigned to.