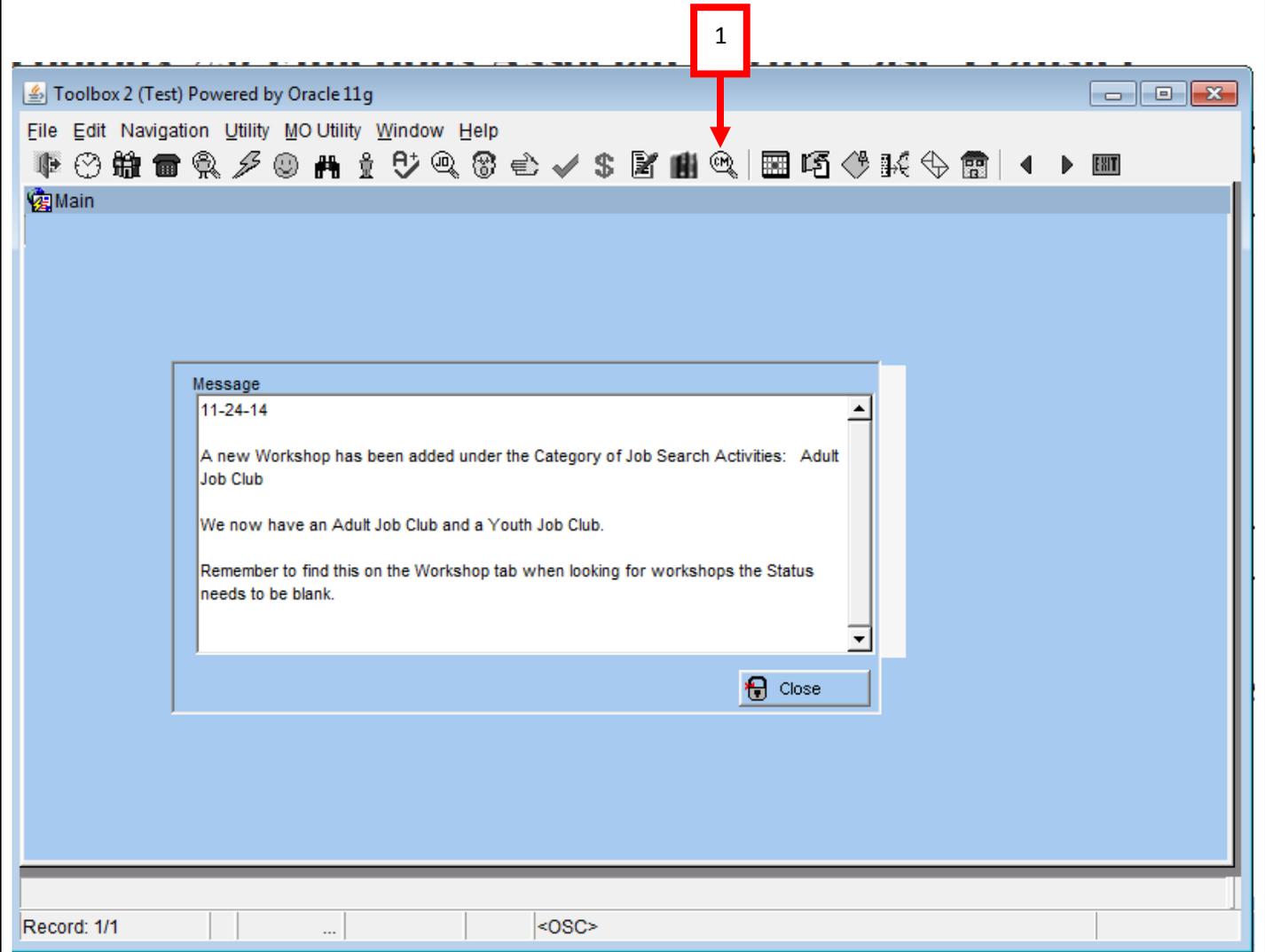




Reassign Cases-Case Management Search

Staff have the ability to easily reassign cases from one staff member to another through the Case Management search

1. Click **Case Management** icon



2. Double click on **Your Name**
3. Locate the name of the counselor who has the case you need to reassign..
4. Click **Ok** button
5. Click **Search** button

The screenshot shows a software interface with a 'Case Management Search' window and a 'Counselors' dialog box. The 'Case Management Search' window has a 'General' tab with fields for 'CM Status' (Active), 'Counselor' (EDWARD GREENSLIT), 'Team', 'Office', 'Region', and 'County'. The 'Counselors' dialog box has a 'Find%' field and a list of counselor names: ALBERTSON, TRACI; ALDRIDGE, JANICE; ALLEN, CATHY; ALLEN, LAWAYNA; ALLEN, TIM. The 'ALLEN, CATHY' entry is highlighted in blue. The 'OK' button is visible in the dialog box. The 'Case Management Search' window also has a 'Search' button and a 'Clear All' button. The main window has a table with columns: Name, Primary Counselor | Office | Team | Title, City, and Phone. The table is currently empty. The status bar at the bottom shows 'Total Records: 0', 'Number Selected: 0', and 'Destination: Seeker Info Tab'. There are also buttons for 'Select All', 'DeSelect All', 'Print Report', 'Print List', and 'Excel'.

6. Use the **check boxes** to determine which case(s) you will reassign

NOTE: Toolbox checks all cases by default. You can use the **Select All** and **Deselect All** to assist you with reassigning cases.

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	Name	Primary Counselor Office Team Title	City	Phone
<input checked="" type="checkbox"/>	EXAMPLE II, I AM A	CATHY ALLEN JEFFERSON CITY CAREER CENTER JEFFERSON	JEFFERSON CITY	(573)555-1212
<input checked="" type="checkbox"/>	EXAMPLE IV, I AM A	CATHY ALLEN JEFFERSON CITY CAREER CENTER JEFFERSON	JEFFERSON CITY	
<input checked="" type="checkbox"/>	EXAMPLE, I AM	CATHY ALLEN JEFFERSON CITY CAREER CENTER JEFFERSON	JEFFERSON CITY	
<input type="checkbox"/>				

Total Records: 3 Number Selected: 3
Destination: Seeker Info Tab

Click in box to select a specific case
Record: 1/3 ... <OSC>

7. Click **Options**
8. Choose **Reassign Counselor**

The screenshot shows a software window titled "Toolbox 2 (Test) Powered by Oracle 11g - Case Management Search". The menu bar includes "File", "Options", "Utility", "MO Utility", and "Window". The "Options" menu is open, and the "Reassign Counselor" option is highlighted. Red boxes with numbers 7 and 8 indicate the steps: 7 points to the "Options" menu, and 8 points to the "Reassign Counselor" option.

The main interface has two tabs: "General" and "Additional". The "General" tab is active, showing fields for "CM Status" (Active), "Enrollment Type" (Actual), "Counselor" (CATHY ALLEN), "Service", "Team", "Referral Service", "Office", "Date", "Region", "Country", and "Pending Soft Exit in 30 Days". There are also checkboxes for "Veterans Only", "No Notes last 30 days", "No Tasks last 30 days", "No Services 30 days", and "All History".

Below the form is a table with columns: Name, Primary Counselor | Office | Team | Title, City, and Phone. The table contains three rows of data:

	Name	Primary Counselor Office Team Title	City	Phone
<input checked="" type="checkbox"/>	EXAMPLE II, I AM A	CATHY ALLEN JEFFERSON CITY CAREER CENTER JEFFERSON	JEFFERSON CITY	(573)555-1212
<input type="checkbox"/>	EXAMPLE IV, I AM A	CATHY ALLEN JEFFERSON CITY CAREER CENTER JEFFERSON	JEFFERSON CITY	
<input type="checkbox"/>	EXAMPLE, I AM	CATHY ALLEN JEFFERSON CITY CAREER CENTER JEFFERSON	JEFFERSON CITY	

At the bottom of the table, there are fields for "Total Records: 3" and "Number Selected: 1". Below these are buttons for "Select All", "DeSelect All", "Print Report", "Print List", and "Excel".

At the very bottom, there is a status bar with the text "Click in box to select a specific case", "Record: 3/3", and "<OSC>".

9. Double click in the **Counselor** field.
10. Locate and choose the **counselor** you wish to reassign the task to.
11. Click **Ok** button

Note: If the counselor you are assigning to has more than one Hat they will be listed in the LOV more than once. They are listed by alphabetical order by Hat.

The screenshot shows the 'Case Management Search' interface. The 'Counselor' field is highlighted with a red box and labeled '9'. A search results dialog box is open, showing a list of counselors with columns for Counselor, Office, Team, and Title. The first entry, 'GAGE, NICO | JEFFERSON CITY CAREER CENTER |', is highlighted with a red box and labeled '10'. The 'OK' button in the dialog box is also highlighted with a red box and labeled '11'. Below the dialog box, a table lists several counselors, with the first row selected. The table has columns for Name, Primary Counselor, Office, Team, Title, City, and Phone.

	Name	Primary Counselor	Office	Team	Title	City	Phone
<input checked="" type="checkbox"/>	EXAMPLE II, I AM A	CATHY ALLEN	JEFFERSON CITY CAREER CENTER	JEFFERSON	JEFFERSON	JEFFERSON CITY	(573)555-1212
<input type="checkbox"/>	EXAMPLE IV, I AM A	CATHY ALLEN	JEFFERSON CITY CAREER CENTER	JEFFERSON	JEFFERSON	JEFFERSON CITY	
<input type="checkbox"/>	EXAMPLE, I AM	CATHY ALLEN	JEFFERSON CITY CAREER CENTER	JEFFERSON	JEFFERSON	JEFFERSON CITY	
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Total Records: 3 Number Selected: 1
 Destination: Seeker Info Tab

12. Counselor's name is now populated in **Assign To** field
13. Leave the checkbox for **Assign Uncompleted Tasks, Future Tasks and Appointments** checked
14. Click **Assign** button

Case Management Search

General Additional

CM Status: Active Enrollment Type: Actual

Counselor: NICO GAGE | JEFFERSON CITY CAREER CENTER | JEFFERSON CITY C

Assign Uncompleted Tasks, Future Tasks and Appointments

Assign Cancel

Veterans Only
 No Notes last 30 days
 No Tasks last 30 days
 No Services 30 days
 All History

Clear All
Search

	Name	Primary Counselor	Office Team Title	City	Phone
<input checked="" type="checkbox"/>	EXAMPLE II, IAM A	CATHY ALLEN JEFFERS	CAREER CENTER JEFFERSON	JEFFERSON CITY	(573)555-1212
<input type="checkbox"/>	EXAMPLE IV, IAM A	CATHY ALLEN JEFFERSON CITY CAREER CENTER JEFFERSON	JEFFERSON	JEFFERSON CITY	
<input type="checkbox"/>	EXAMPLE, IAM	CATHY ALLEN JEFFERSON CITY CAREER CENTER JEFFERSON	JEFFERSON	JEFFERSON CITY	

Total Records: 3 Number Selected: 1

Destination: Seeker Info Tab

Select All DeSelect All Print Report Print List Excel

Record: 1/1 ... List of Valu... <OSC>

15. Case has been reassigned from Cathy to Nico

The screenshot shows the 'Case Management Search' window with the 'General' tab selected. The search criteria include CM Status: Active, Enrollment Type: Actual, and Counselor: CATHY ALLEN. The search results table is as follows:

	Name	Primary Counselor Office Team Title	City	Phone
<input checked="" type="checkbox"/>	EXAMPLE II, I AM A	CATHY ALLEN JEFFERSON CITY CAREER CENTER JEFFERSON	JEFFERSON CITY	(573)555-1212
<input checked="" type="checkbox"/>	EXAMPLE IV, I AM A	CATHY ALLEN JEFFERSON CITY CAREER CENTER JEFFERSON	JEFFERSON CITY	
<input type="checkbox"/>				
<input type="checkbox"/>				

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The screenshot shows the 'Case Management Search' window with the 'General' tab selected. The search criteria include CM Status: Active, Enrollment Type: Actual, and Counselor: NICO GAGE. The search results table is as follows:

	Name	Primary Counselor Office Team Title	City	Phone
<input checked="" type="checkbox"/>	EXAMPLE III, I AM A	NICO GAGE JEFFERSON CITY CAREER CENTER JEFFERSON CI	JEFFERSON CITY	
<input checked="" type="checkbox"/>	TESTER, NICO	NICO GAGE JEFFERSON CITY CAREER CENTER JEFFERSON CI	JEFFERSON CITY	
<input checked="" type="checkbox"/>	TESTER, NICO S	NICO GAGE JEFFERSON CITY CAREER CENTER JEFFERSON CI	JEFFERSON CITY	418-8557