



# Supervisors/Managers

## How Do I Guide

### Assignments

Assignments		
How Do I...?	Selections	Tips & Guidelines
Assign case	<ul style="list-style-type: none"> <li>On the Cases outliner, click the Action icon next to appropriate Case icon.</li> <li>Click the Assignment icon.</li> <li>Click the Actions link for an assignment row.</li> <li>On the Actions page, select Create Assignment and click Continue.</li> <li>Enter the applicable data/values.</li> <li>Click the Select hyperlink for the new supervisor or worker name(s) for which the assignment is being created.</li> </ul>	<i>eWiSACWIS automatically generates an email to the workers to notify them of the new assignment.</i>
Reassign case	<ul style="list-style-type: none"> <li>On the Workers outliner, click the supervisor desk icon to expand the outliner to the worker currently assigned to the case.</li> <li>Click on the worker icon to bring up the list of cases assigned to the worker.</li> <li>Click the Actions link for the appropriate case.</li> <li>Select the Assignment Maintenance radio button and click Continue.</li> <li>Enter the applicable data/values.</li> <li>Click the Reassign or Reassign All button.</li> <li>Enter the applicable data/values.</li> <li>Click the Select hyperlink for the new worker name for the Assignment Details/Worker field.</li> <li>Click the Assign button.</li> </ul>	<i>eWiSACWIS automatically generates an email to the workers to notify them of the re-assignment.</i>
Close assignment without reassigning another worker	<ul style="list-style-type: none"> <li>On the Workers outliner, click the supervisor desk icon to expand the outliner to the worker currently assigned to the case.</li> <li>Click on the worker icon to bring up the list of cases assigned to the worker.</li> <li>Click the Actions link for the appropriate case.</li> <li>Select the Assignment Maintenance radio button and click Continue.</li> <li>Select the Close radio button.</li> <li>Click Save and Close</li> </ul>	<i>Assignment cannot be closed if incomplete approvals exist.</i>
Close assignment to yourself, another supervisor, secondary worker, administrative worker if you have assignment to case	<ul style="list-style-type: none"> <li>On the Cases outliner, click the appropriate Case icon.</li> <li>Click the Assignment icon.</li> <li>Click the appropriate worker name.</li> <li>On the Worker Assignment page, click the Close radio button and click Save and then Close.</li> </ul>	<i>Assignment cannot be closed if incomplete approvals exist.</i>
Reassign ticklers via assignment process (current assignment open)	<ul style="list-style-type: none"> <li>On the Tickler Reassignment page, select the applicable ticklers along with the applicable workers.</li> <li>Click Save and Close.</li> </ul>	<i>Tickler Reassignment page automatically displays when Current Worker Status <u>Do Not Close</u> radio button is selected.</i>
Reassign ticklers via assignment process (current assignment closed)	<ul style="list-style-type: none"> <li>On the Worker Assignment page, click applicable worker. Click OK.</li> </ul>	<i>Worker Assignment page automatically displays when Current Worker Status <u>Close</u> radio button is selected.</i>



# Supervisors/Managers

## How Do I Guide

### Assignments

Assignments

How Do I...?	Selections	Tips & Guidelines
Reassign multiple assignments	<ul style="list-style-type: none"> <li>▪ Click Utilities &gt; Assignment Management</li> <li>▪ Select View By Case or Provider or Worker radio button.</li> <li>▪ In the Worker field, select the worker name and then select either a Case or a Provider from the respective drop down fields. The Assignments will be displayed under the Assignments group box.</li> <li>▪ Select 'All' to select all of the listed Assignments.</li> <li>▪ Select the checkbox(es) adjacent to the Assignment item(s) which you will be reassigning.</li> <li>▪ Click on Select Worker link to select the Assignee</li> <li>▪ Click Continue</li> <li>▪ If you want to change the Assignee with another Assignee, click on the Remove link and select another Assignee.</li> <li>▪ When ready to make the Reassignment, click Save.</li> </ul>	<p><i>Ticklers will remain with the current worker if the current worker still retains an open assignment to the case or provider.</i></p> <p><i>Primary Assignments cannot be closed via Assignment Management.</i></p>
Close multiple assignments	<ul style="list-style-type: none"> <li>▪ Click Utilities &gt; Assignment Management</li> <li>▪ Select the Close radio button</li> <li>▪ Select View By Case or Provider or Worker radio button.</li> <li>▪ In the Worker field, select the worker name and then select either a Case or a Provider from the respective drop down fields.</li> <li>▪ The Assignments will then be displayed under the Assignments group box.</li> <li>▪ Select 'All' to select all of the listed Assignments.</li> <li>▪ Select the checkbox(es) adjacent to the Assignment item(s) which you will be closing.</li> <li>▪ When ready to close the selected assignments, click Save.</li> </ul>	<p><i>Primary Assignments cannot be closed via Assignment Management.</i></p>




# Supervisors/Managers

## How Do I Guide

### Approvals

Approvals

How Do I...?	Selections	Tips & Guidelines
Approve case/provider work	<ul style="list-style-type: none"> <li>On the Approvals expando, expand the Pending Approvals for 'Your Name' icon and click the applicable pending approval item.</li> <li>Review the item and make modifications/corrections as necessary. Save the item.</li> <li>On the applicable page, select Approval from the Options list and click the Go button.</li> <li>Note: The Pending Approvals  displays with the desk icon and your name.</li> <li>Supervisors do not need an assignment to the case or provider to update the item that has been forwarded to them for approval.</li> </ul>	<p><i>Approval Decision selections:</i></p> <p><i>Approve-to approve the work and forward for Supervisory Approval, if needed;</i></p> <p><i>Not Approve-to finalize work that is not receiving approval. The work is "frozen" with a status of Not Approved.</i></p> <p><i>Reroute-to forward work for approval to another worker using the Reroute Worker Approval page.</i></p> <p><i>Recall/Return-to recall or return work that has been submitted for approval.</i></p> <p><i>View-to view the approval history for a piece of work.</i></p>
View approval history	<ul style="list-style-type: none"> <li>On the Approvals expando, expand the Approvals History icon to view the applicable approval history for work that has received a final approval status <b>or</b></li> <li>On applicable page, select Approval from the Options drop-down and click the Go button to view the history at any point in the approval process.</li> </ul>	<p><i>This will allow you to view approvals with a final approval status of Approved or Not Approved.</i></p> <p><i>Initial Status/Initial Action: Item has been created by original worker but not approved</i></p> <p><i>Pending Status/Approved Action: Item is in Pending status in the approval process but has been approved by original worker</i></p> <p><i>Pending Status/Received Action: Item is in Pending status in the approval process but has been received by next approver or supervisor</i></p> <p><i>Approved Status/Approved Action: Item has completed the approval process</i></p> <p><i>Not Approved Status/Not Approved Action: Item has completed the approval process</i></p> <p><i>After 4 days the approved work will be removed from the Approvals in Progress outliner.</i></p>
Add/view approval comments	<ul style="list-style-type: none"> <li>On the Approvals expando, expand the Pending Approvals for 'Your Worker' name icon and click the Actions link on the applicable approval.</li> <li>On the Actions pop-up page, select Comments.</li> <li>Click the Continue button.</li> <li>Add/view comments in the free form text box and click the Save button. Click Close.</li> </ul>	<p><i>Approval rows with comments will be displayed with a pencil icon.</i></p>



# Supervisors/Managers

## How Do I Guide

### Approvals

Manage Pending Approvals

- Click Utilities > Approval Management
- The Approval Management page displays. Select the Manage My Pending Approvals radio button.
- In the Worker field, select the worker who has forwarded the approval(s) to you, or select 'All' to view all of your pending approvals.
- Select the checkbox(es) adjacent to the work item(s) for which you will be entering an approval decision.
- Select an Approval Decision to be applied to the selected work items.
- Click Save.

*Easy way to approve multiple items simultaneously.*

*Approvals with a status of Initial will not appear on the Manage My Pending Approvals activity.*

*Review the work prior to making the approval decision by clicking the links in the Work Type column*

Reroute Worker Approvals

- Click Utilities > Approval Management
- The Approval Management page displays. Select the Reroute Worker Approvals radio button.
- In the Worker field, select the name of the worker for whom you will be rerouting approvals.
- Select the checkbox(es) adjacent to the work item(s) you will be rerouting.
- Click the Select Worker link.
- The Reroute Worker Approval pop-up page appears.
- Select the worker who will be receiving the rerouted approvals.
- Click Continue.
- Click Save.

*Useful when a worker has left the agency and approvals need to be routed to another worker so that the original worker can be inactivated.*



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# Supervisors/Managers

## How Do I Guide

### Case Actions

#### Case Actions

How Do I...?	Selections	Tips & Guidelines
Change Services Report to a Child Protective Services Report	<ul style="list-style-type: none"> <li>On the Access Report page, select 'CPS Report' from the Access Report Type dropdown list.</li> <li>A message displays indicating the Services Report will be changed to a Child Protective Services Report. Click Yes to continue and create the CPS Report.</li> <li>On the Access Report page, enter the applicable data/values.</li> </ul>	<p><i>Prior to making the access screening decision, you can change a Services Report to a CPS Report and retain the access participants by changing the value in the Access Report Type dropdown field.</i></p>
Change Child Protective Services Report to a Services Report	<ul style="list-style-type: none"> <li>On the Access Report page, select 'Services Report' from the Access Report Type dropdown list.</li> <li>A message displays indicating the Child Protective Services Report will be changed to a Services Report. Click Yes to continue and create the Services Report.</li> <li>On the Access Report page, enter the applicable data/values.</li> </ul>	<p><i>Prior to making the access screening decision, you can change a CPS Report to a Services Report and retain the access participants by changing the value in the Access Report Type dropdown field.</i></p>
Link Services Report to a case or create new case	<ul style="list-style-type: none"> <li>On the Access Reports expando, click the pending services report.</li> <li>On the Decision tab/Supervisor Decision box, click the applicable radio button (Screen in or Screen out).</li> <li>Enter the other applicable data/values.</li> <li>Click the Create/Link Case link.</li> <li>On the Search Case page:               <ul style="list-style-type: none"> <li>For a match: Click the radio button for the appropriate case and click the Link button.</li> <li>For no match: Click the Create button and enter the applicable data/values on the Maintain Case page.</li> </ul> </li> </ul>	<p><i>When a new case is created, a message displays asking if you would like to create an assignment to the case. If Yes is selected, the Assignment page displays allowing the case to be assigned to the appropriate worker. Selecting the Close radio button in the Current Worker Status group box will close your assignment to the case. If No is selected for the message asking if you would like to create an assignment to the case, then supervisory assignment is automatically made to the supervisor who created the case. The supervisory assignment to the case can be closed by following the steps in the Assignment section of this How Do I guide.</i></p> <p><i>Service Report type of Re-open Closed Case is selected to re-open a closed.</i></p>



# Supervisors/Managers

## How Do I Guide

### Case Actions

Link CPS Report to a case or create new case

- On the Access Reports expando, click the pending services report.
- On the Decision tab/Supervisor Decision box, click the applicable radio button (Screen in or Screen out).
- Enter the other applicable data/values.
- Click the Create/Link Case link.
- On the Search Case page:
  - For a match: Click the radio button for the appropriate case and click the Link button.
  - For no match: Click the Create button and enter the applicable data/values on the Maintain Case page.

*When a new case is created, a message displays asking if you would like to create an assignment to the case. If Yes is selected, the Assignment page displays allowing the case to be assigned to the appropriate worker. Selecting the Close radio button in the Current Worker Status group box will close your assignment to the case. If No is selected for the message asking if you would like to create an assignment to the case, then supervisory assignment is automatically made to the supervisor who created the case. The supervisory assignment to the case can be closed by following the steps in the Assignment section of this How Do I guide.*

*Service Report type of Re-open Closed Case is selected to re-open a closed.*

De-link a mistakenly linked Services Report or CPS Report from a case

- On the Cases outliner, click on the case name link.
- On the Maintain Case page, select Delink Access Report/Assessment from the Options list and click Go.
- Access Reports meeting the criteria to be delinked will be displayed. Select the applicable Access Report, click Save and then click Close.
- CPS Reports that have been linked to a pending Assessment and the Assessment is in the very early stages, may be available for delink. Select the Assessment with the attached Access Report(s) and then click Save.
- When the 'Search Case' page opens select a case to relink the Assessment and Access Report(s) to by choosing the radio button next to the case name, or select the 'Create' button to create a new case.

*Whether or not Access Reports appear in the Delink Access Report/Assessment pop-up page depends on a number of factors.*

*Supervisors without the security to delink Assessments may only delink Access Reports that have not had an assessment started.*

*If person specific work was added to the case for Access Report participants after the Access Report was linked to the case, the Access report may not be available for delinking.*

*Assessments that have progressed beyond the initial stages may not be delinked.*

*Delinking the last remaining Access Report on a case will result in the case being deleted from the system.*

Remove person mistakenly added to a case

- On the Cases outliner, click on the case name link.
- On the Maintain Case page, select the Remove link for the appropriate participant to be removed.
- Click save and then click Close.

*Only a supervisor can remove a participant if he/she had been erroneously added to a case and the participant is not associated with any open case work.*

*A worker or a supervisor can deactivate a participant if he/she will be a participant in the case but just not an active participant. Please see the Case Maintenance How Do I guide for more information on deactivating a participant.*



# Supervisors/Managers

## How Do I Guide

### Tickler Management

#### Tickler Management

How Do I...?	Selections	Tips & Guidelines
Tickler Reassignment	<ul style="list-style-type: none"> <li>Click Utilities &gt; Tickler Management</li> <li>The Tickler Management page displays. Select the Tickler Reassignment radio button.</li> <li>In the Worker field, select the worker who has ticklers that need to be reassigned.</li> <li>In the Case/Provider field, select the case or provider that has ticklers to be reassigned.</li> <li>The Tickler Reassignment group box will display all ticklers that can be reassigned for the case.</li> <li>For each tickler to be reassigned, select the appropriate worker in the corresponding Reassign Tickler To field.</li> <li>Click Save.</li> </ul>	<p><i>Supervisors can only reassign ticklers for his/her own workers.</i></p> <p><i>Ticklers can only be reassigned to another worker who has an open active assignment to the case or provider the tickler is for.</i></p> <p><i>AFCARS ticklers cannot be reassigned.</i></p>
Tickler Deletion	<ul style="list-style-type: none"> <li>Click Utilities &gt; Tickler Management</li> <li>The Tickler Management page displays. Select the Tickler Deletion radio button.</li> <li>The Tickler Deletion group box displays.</li> <li>In the Worker field, select the worker who has ticklers that need to be deleted.</li> <li>The Tickler Deletion groupbox updates to reflect the ticklers available for deletion.</li> <li>Click the Delete checkbox for each tickler to be deleted.</li> <li>Click Save.</li> </ul>	<p><i>Supervisors can only delete ticklers for his/her own workers.</i></p> <p><i>Supervisors cannot delete their own ticklers.</i></p> <p><i>AFCARS ticklers cannot be deleted.</i></p> <p><i>Other ticklers will be available for deletion once they have displayed on the Tickler expando for the worker.</i></p>
View Case/Provider Ticklers from Worker outliner	<ul style="list-style-type: none"> <li>On the Workers outliner, click the supervisor desk icon to expand the outliner to view all workers.</li> <li>Click the Worker icon to expand the appropriate worker who is assigned to the case or provider.</li> <li>Click on the Actions link for the appropriate case or provider.</li> <li>Select the View Ticklers radio button and click Continue.</li> </ul>	
View Case/Provider Ticklers from Case/Provider outliner	<ul style="list-style-type: none"> <li>On the Case or Provider outliner, click the Actions link for the appropriate case or provider.</li> <li>Select the View Ticklers radio button and click Continue.</li> </ul>	



# Supervisors/Managers

## How Do I Guide

### Worker Information

### Worker Information

How Do I...?	Selections	Tips & Guidelines
Establish new worker record	<ul style="list-style-type: none"> <li>Click Maintain &gt; Worker.</li> <li>On the Maintain Worker Information page, click the Search link by the Name field.</li> <li>On the Search Person page, enter the applicable data/fields and click the Search button.               <ul style="list-style-type: none"> <li>For a match: Select the applicable worker and click OK.</li> <li>For no match: Click the Create button and enter the applicable data/values on the Person Management page. Click Save. Click Close. Click Continue.</li> </ul> </li> <li>After successfully matching the worker, enter any additional data/values on the Maintain Worker Information page.</li> </ul>	<p><i>After completing the Person Management page to create the record for the new worker, you will be returned to the Search Person page. Click Continue to return to the Maintain Worker Information page.</i></p>
Change name of supervisor on worker's record	<ul style="list-style-type: none"> <li>On the Maintain Worker Information page for the applicable worker, click the Search link by the Supervisor Name field.</li> <li>On the Worker Search page, enter the applicable data fields/values.</li> <li>Click the Search button.</li> <li>Select the radio button for the appropriate supervisor. Click Continue.</li> </ul>	<p><i>Access the Maintain Worker Information page by clicking Maintain &gt; Worker. Click the Search link on the Maintain Worker Information page to search and retrieve the worker record to update.</i></p>
Update worker name	<ul style="list-style-type: none"> <li>On the Maintain Worker Information page for the applicable worker, click the Worker's Name link to Launch the worker's Person Management page.</li> <li>Enter/update the applicable data fields/values.</li> <li>Click Save and click Close.</li> </ul>	
View/update training history information	<ul style="list-style-type: none"> <li>On the Workers outliner, click the supervisor desk icon to expand the outliner to display workers.</li> <li>Click the worker's name link.</li> <li>On the Worker Information page/Individual Training History tab, click the Insert button.</li> <li>In the Worker Training Information box, enter the applicable data fields/values.</li> </ul>	<p><i>Click Insert to add an additional course listing.</i></p>
View/update training plan information	<ul style="list-style-type: none"> <li>On the Workers outliner, click the supervisor desk icon to expand the outliner to display workers.</li> <li>Click the worker's name link.</li> <li>On the Worker Information page/Individual Training Plan tab, enter the applicable training plan year value in the Enter Training Plan Year field.</li> <li>Enter applicable data fields/values. Click Save and then click Close.</li> </ul>	<p><i>Click Insert to add a line for new training plan information.</i></p> <p><i>To add a plan for a new year, type the year in to the Enter Training Plan Year field and proceed to insert new information.</i></p>



# Supervisors/Managers

## How Do I Guide

### Payments

#### Payments

How Do I...?	Selections	Tips & Guidelines
Initiate payment request	<ul style="list-style-type: none"> <li>Click Create &gt; Case Work &gt; Payment &gt; Payment Request.</li> <li>Click the appropriate case and case participant.</li> <li>Click the Create button.</li> <li>On the Payment Request page, click the Search link in the Provider Information group box.</li> <li>On the Provider Search page, enter the applicable data/values and click the Search button.</li> <li>Select the radio button for the provider. Click Continue.</li> <li>On the Payment Request page, enter the applicable data/values.</li> <li>Select Approval from the Options list. Click Go.</li> <li>Click the Approve radio button. Click Continue.</li> <li>Click Save and click Close.</li> </ul>	<p><i>Payment requests can also be initiated via Create &gt; Provider Work or Financial Work.</i></p>
Cancel payment	<ul style="list-style-type: none"> <li>Click Maintain &gt; Financial &gt; Check Pending.</li> <li>On the Review Pending Checks page, click the Search link for the Provider field.</li> <li>On the Search page, enter the applicable data/values and click the Search button. Click the appropriate provider icon to expand the outliner and click the radio button for the applicable check (one with pending status). Click Continue.</li> <li>On the Review Pending Checks page, scroll right to the Payment Status field.</li> <li>Click Payment Status value. Click Cancel-Do not Pay.</li> <li>Click Save and then click Close.</li> </ul>	<p><i>The cancellation must be completed within one day of the original payment request.</i></p>
Initiate overpayment adjustment	<ul style="list-style-type: none"> <li>Click Create &gt; Provider Work &gt; Payment &gt; Overpayment Adjustment and select the provider.</li> <li>Click the Create button.</li> <li>On the Provider Overpayments page, enter the applicable To/From dates.</li> <li>Click the Search button.</li> <li>Enter the applicable data/values.</li> <li>Select Approval from the Options list. Click Go.</li> <li>Click the Approve radio button. Click Continue.</li> </ul>	



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