

Creating a Participant Assignment

Note: In order to create a participant assignment, an assignment to the case is not needed.

Although the person assignment and case assignment look exactly the same on the eWiSACWIS outliner, the data in the assignment type is differentiated “behind the scenes.” Differentiation between a person assignment and case assignment is important when the need to track a child assigned to a particular assignment type exists (i.e. a report looking for all specific children assigned to a Permanency Consultant would require that a person assignment be created).

Note: a primary assignment cannot be given to a participant. The primary assignment must always be for a case.

From the Desktop:

1. Check the “Participant View” checkbox.
2. Click on the Cases expando to view all of your cases and expand the case you are looking at.
3. Click the Actions hyperlink next to the participant you would like to create an assignment for.

The screenshot shows the eWiSACWIS desktop interface. At the top, there is a navigation bar with links for 'Case Work', 'Provider Work', 'Search', and 'Refresh'. Below this is a menu bar with 'Create', 'Maintain', 'Utilities', 'Adoption Search', and 'Help'. The main content area is titled 'Dan Daisy's Desktop' and includes a filter section with checkboxes for 'Date Restricted', 'Participant View' (checked), and 'View Not Approved/Cancelled'. A 'Ticklers' section is visible, followed by a 'Cases (31)' section. The cases are listed with details such as name, date, location, and FSL status. Under the 'American, Annie M. (9221587)' case, there is a list of participants. The 'Actions' link for the participant 'Andrews, Annie M. (9222721)' is circled in red. A button labeled 'Click to Create Participant Related Work' is also visible.

Participant View View Not Approved/Cancelled

Cases (31)

- Abby, Alice (9221241) Restricted Case Actions**
CPS Family - Ongoing 10/25/2004 Larsson, Branch Milwaukee-Admin 111222 Penntwon Rd , Baraboo, WI 53913 FSL: Moderate
- Abby, Johnny (20273) Restricted Case Actions**
CPS Family - Initial Assessment & JJ 08/01/2000 Daisy, Dan Milwaukee-Region 3 509 W. Wisconsin Avenue , Milwaukee, WI 53203 FSL: Low
- Allen, Sarah E. (9220000) Actions**
CPS Family - Ongoing 12/10/2001 Daisy, Dan Milwaukee-Admin 11 Southern Way , Madison, WI 53702 FSL: Low
- American, Annie M. (9221587) Actions**
CPS Family - Ongoing 10/24/2005 Dan, Daisy Barron - Barron 123 Main , Abbotsford, WI 54405 FSL: Moderate

Active Participants

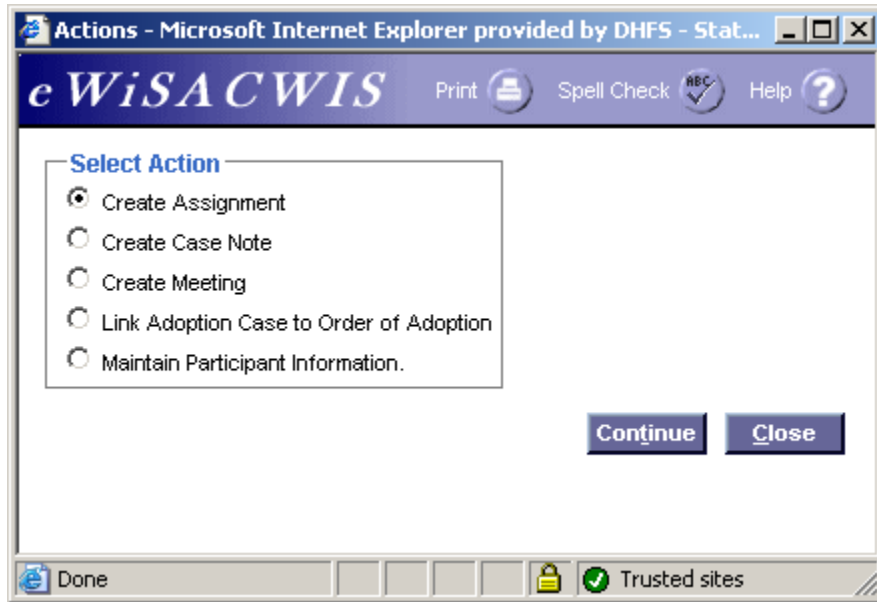
- American, Annie M. (9223760) F Reference Person 08/08/1970 None Actions**
- American, Jack (9223669) M Present Spouse 06/01/1973 None Actions**
- Andrews, Annie M. (9222721) F Biological Child 10/09/1995 None **Actions****
- Andrews, Fannie (9224036) F Biological Child 01/01/2000 None Actions**

Inactive Participants

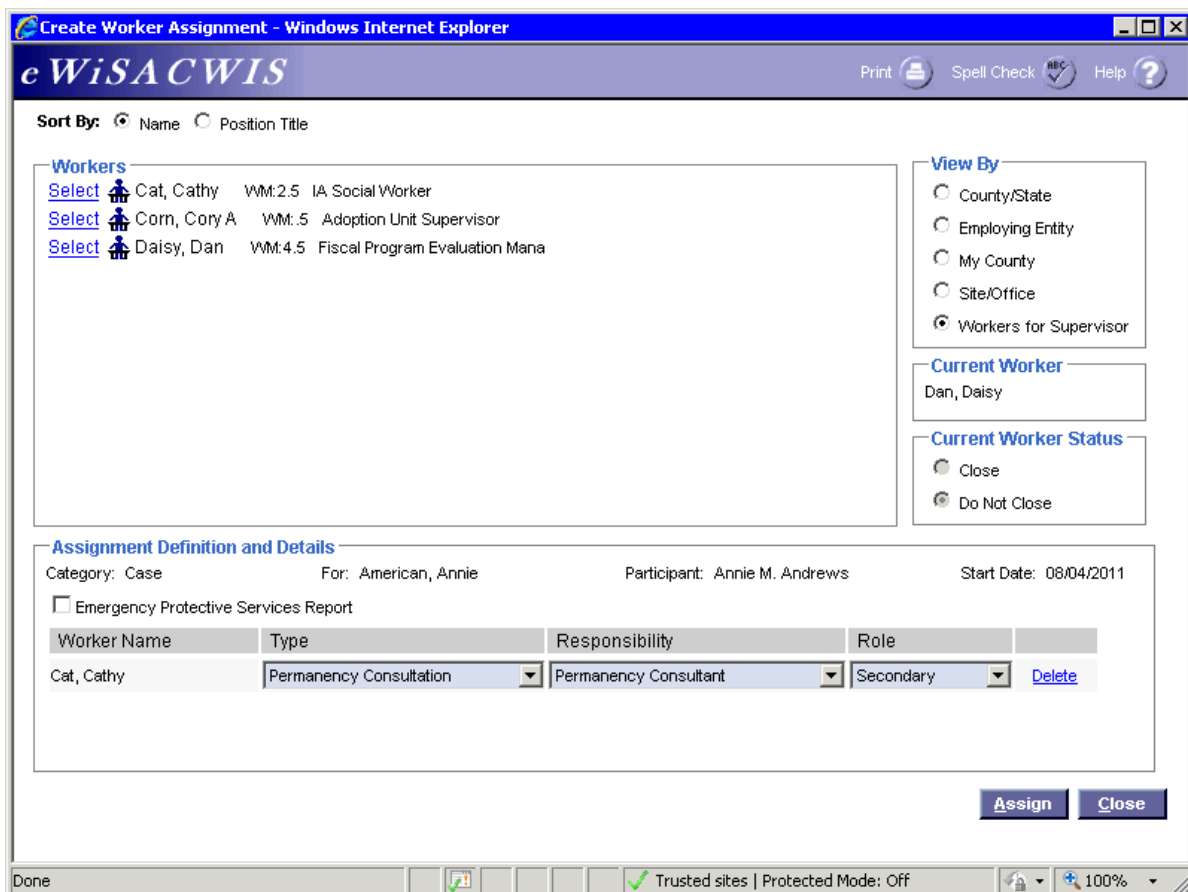
- Andrews, Bernie (9222720) M Biological Child 10/03/2005 Temporary Physical Custody with Agency Actions**

Bluefine, Mom (9222121) Actions
CPS Family - Initial Assessment & JJ 03/14/2007 Fox, Frank Milwaukee-Region 1 21 N Butler , Madison, WI 53703

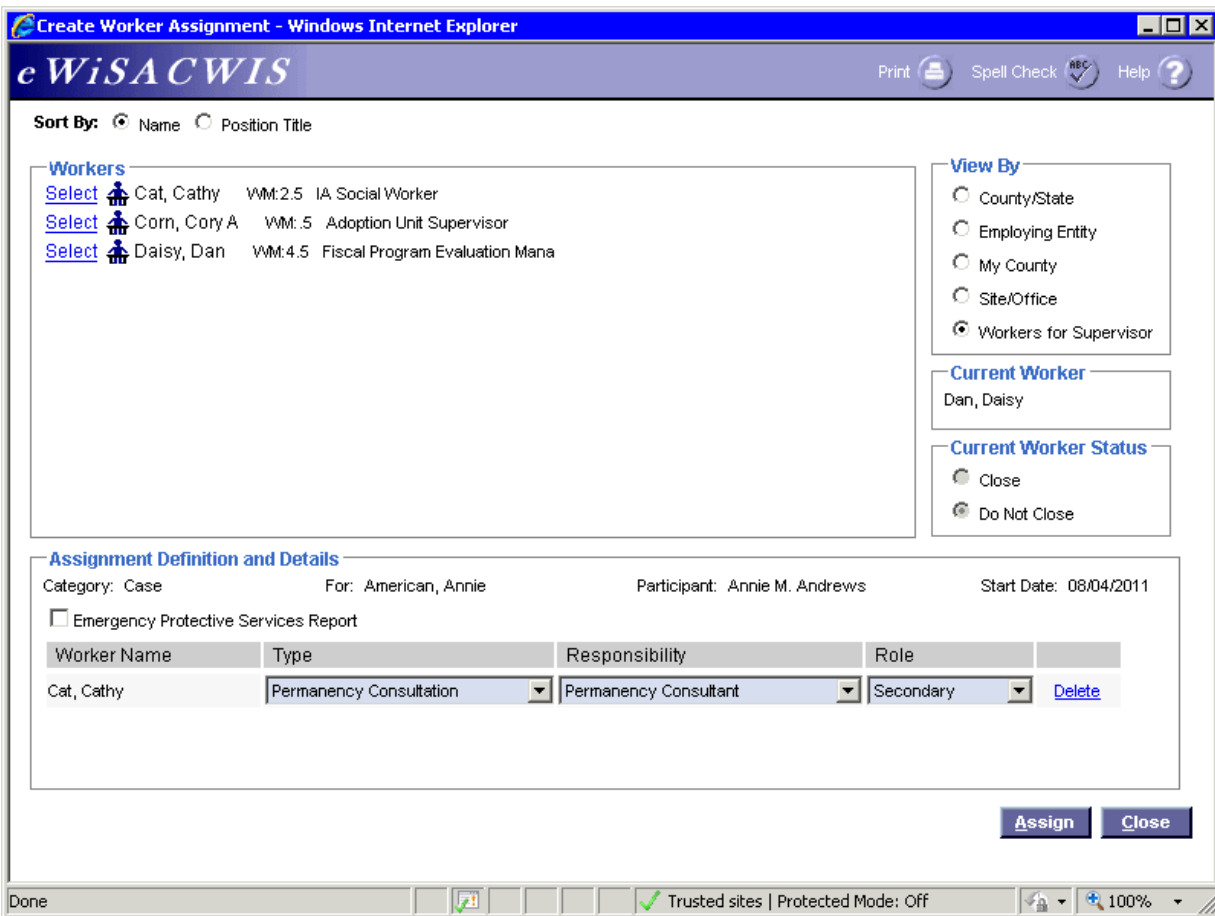
- On the Actions page, select the Create Assignment radio button and click Continue.



- On the Create Worker Assignment page, click on the appropriate Select hyperlink(s) of the worker(s) you want to assign the case participant to. If you do not see his/her name, go to the View By group box and select County/State. On the left side of the screen will be a listing of all counties. Select the appropriate county and look for the name of the person you want to assign the case to. When identified, click on the Select hyperlink next to the worker's name. There is no limit as to the number of assignments you can create for a case participant.



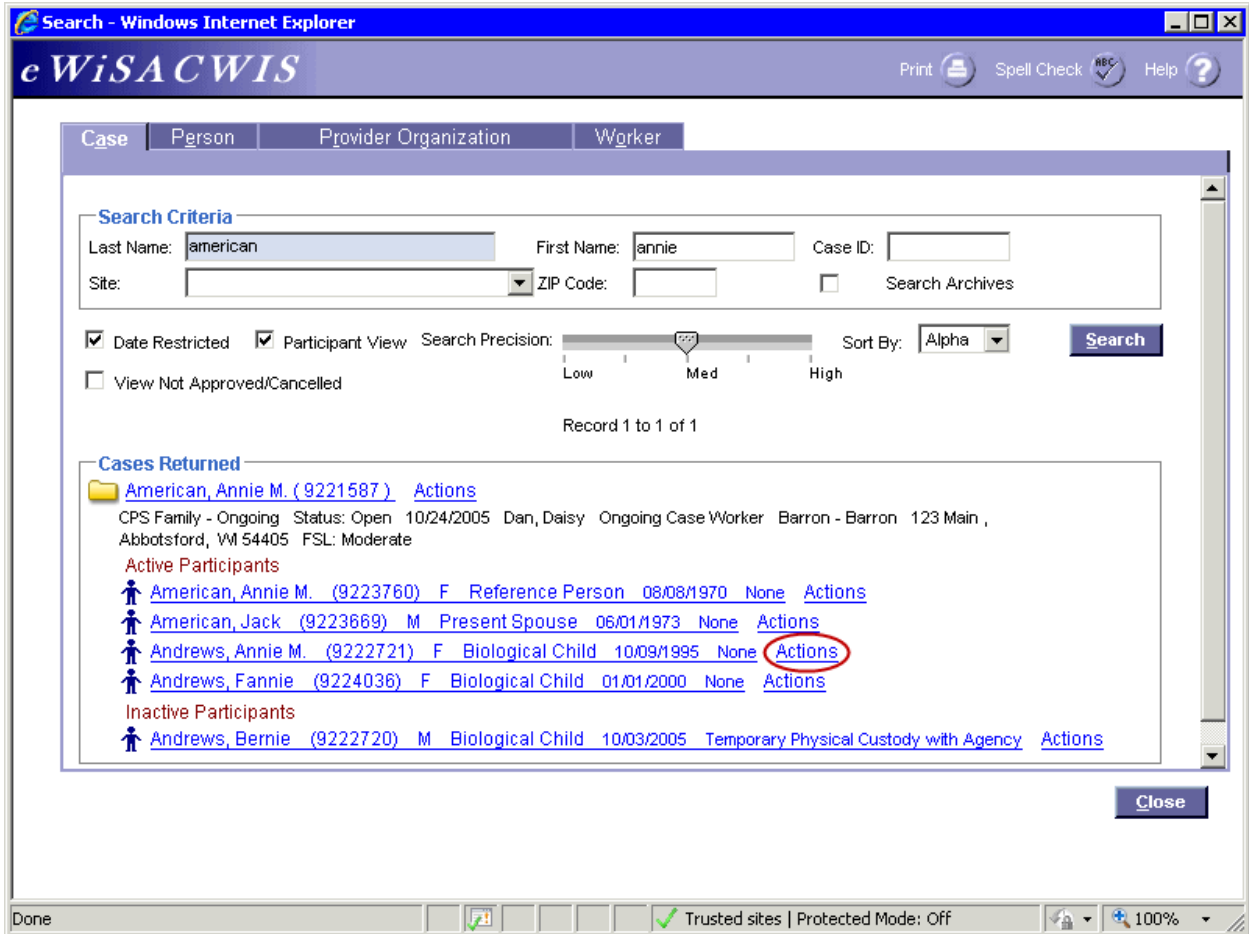
- On the bottom of the page is the Assignment Definition and Details group box. Type, Responsibility, and Role are all drop-down values. Select the appropriate value for the type of case assignment to be made for each worker. Remember, there can only be one Primary Assignment.



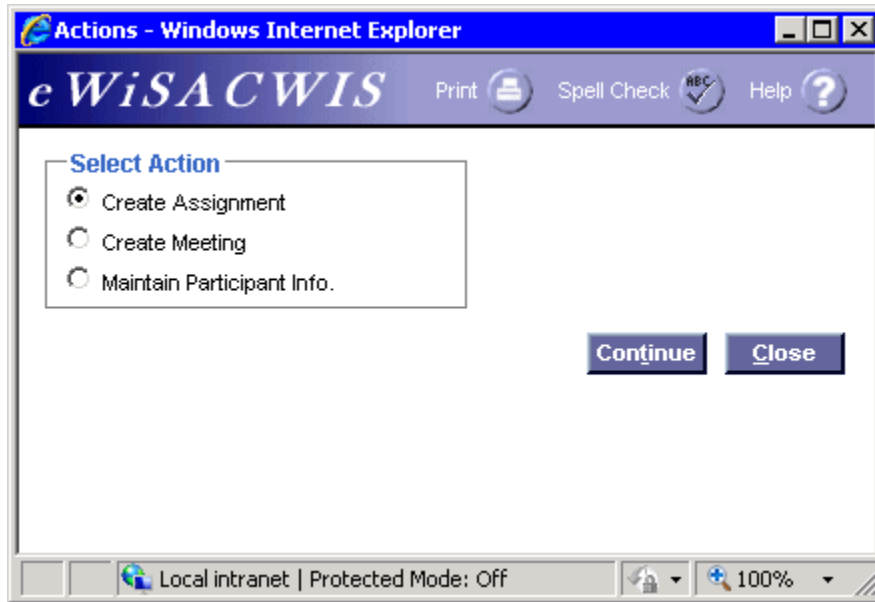
- The Current Worker group box indicates the name of the current worker assigned to the case. The Current Worker Status group box relates to the assignment status of the current worker assigned to the case (this will always be Do Not Close).
- The Assignment Definition and Details group box will pre-fill with the case name (For), the case participant (Participant), the date the assignment was effective for (Start Date), and the new worker assigned (Worker Name).
- Once completed, click on the Assign button. eWiSACWIS will create a new assignment and notify all people newly assigned to the case via e-mail.

From Search:

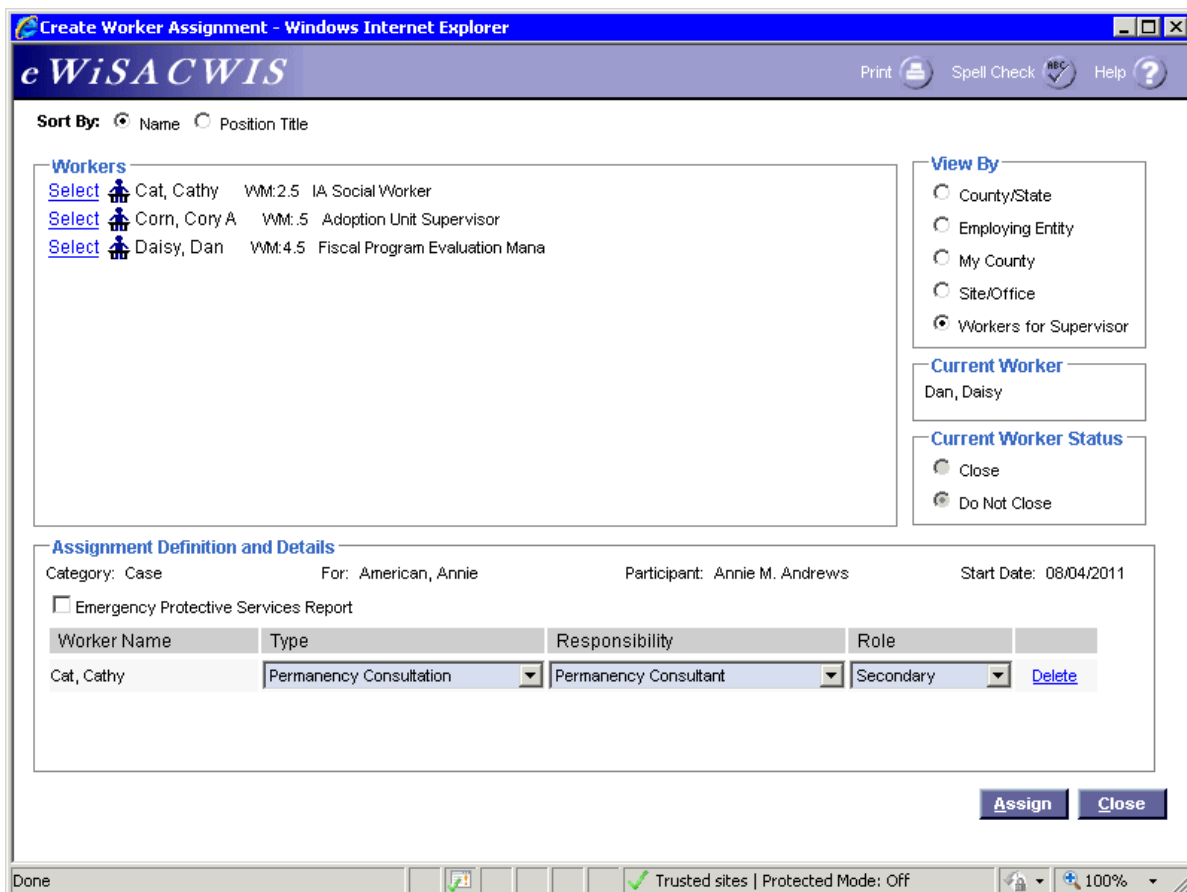
1. Enter the Last Name and First Name or Case ID.
2. Check the “Participant View” checkbox- this will automatically do a search for cases.
3. In the Cases Returned group box, expand the Case icon for your case.
4. Click the Actions hyperlink next to the participant you would like to create an assignment for.



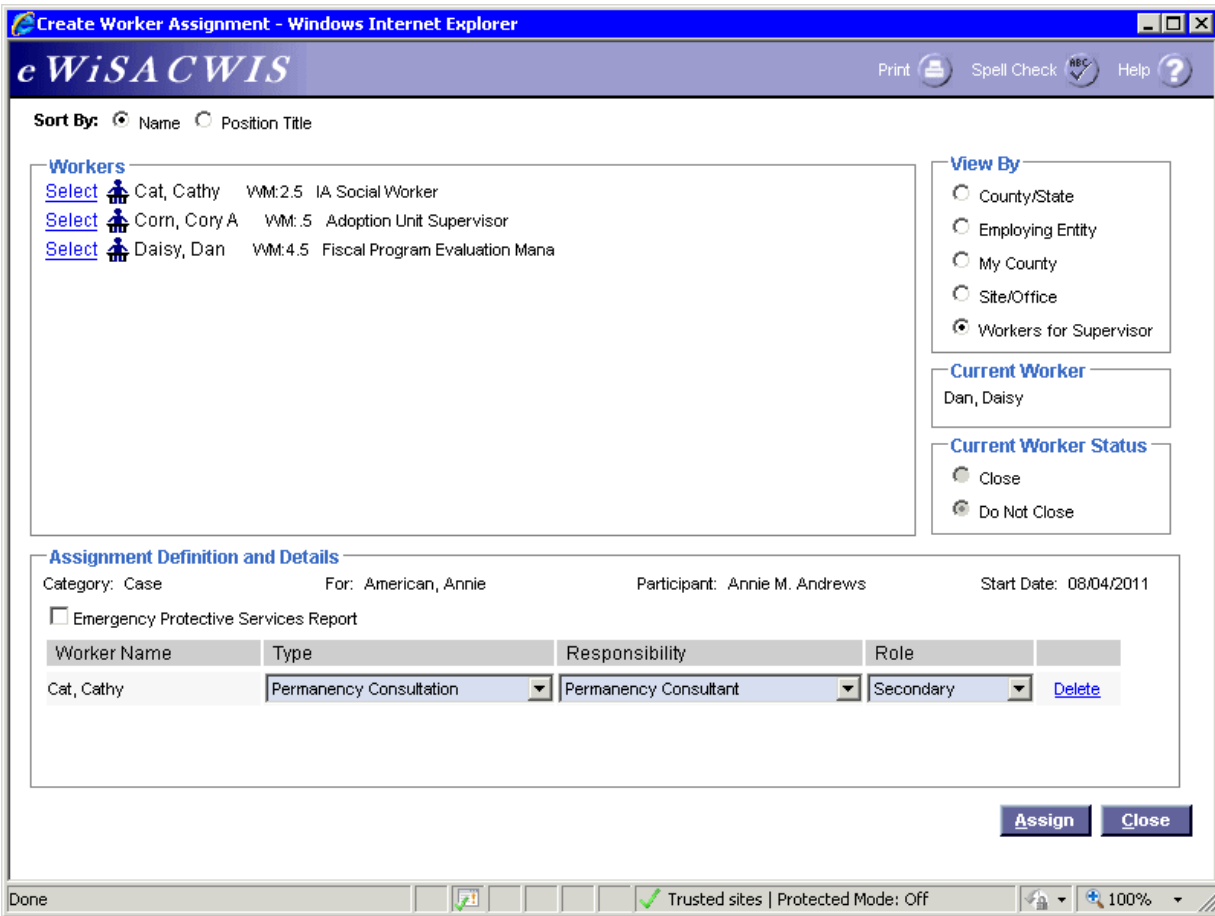
- On the Actions page, select the Create Assignment radio button and click Continue



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- On the bottom of the page is the Assignment Definition and Details group box. Type, Responsibility, and Role are all drop-down values. Select the appropriate value for the type of case assignment to be made for each worker. Remember, there can only be one Primary Assignment.



- The Current Worker group box indicates the name of the current worker assigned to the case.
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