

# 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 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. Select the ‘Participant View’ radio button.
2. Click on the ‘View participants’ expando to view all participants for a specific case.
3. Click on the appropriate participant icon and select ‘Create Assignment’ from the Actions drop-down for the specific participant to open the Create Worker Assignment page.

**View by:** ☐ Case ☒ Participant **Filter by:** ☐ Date restricted ☐ Not approved/cancelled **Cases: 429** [Create case work](#) ☒ Multiselect  

**Aardvark, Amy B. (9222933)**  
Case details: CPS Family - Ongoing, BMW-IA 2, Open OHP exists for associated participant(s)  
Case address: C/O: Ginger Rogers Care of Line, 889 stapler gray, Madison, WI 53701, (888) 222-6666  
Primary worker: Corn, Conn C., Jr., (608) 266-4496 Ext. 1222, [Conn@wisconsin.gov](mailto:Conn@wisconsin.gov)  
Actions: [Please select an action](#)

**View participants**

 Aardvark, Alan 10/07/1991 Biological Child (CPS, CW, JJ) - Active	 Aardvark, Abigail A., III 06/01/2009 Biological Child, OHC (CPS, CW, ICPC) - Active	 Aardvark, Adam A. 05/16/2011 Biological Child, OHC (CW) - Active	 Aardvark, Amy B. 08/05/1974 Reference Person (None) - Active
 Jackson, Jackson 04/01/2016 Biological Child, OHC (None) - Active	 Jackson, Jackson 04/01/2016 Biological Parent (None) - Active	 Johnson, Baby 01/01/2016 Biological Child, OHC (CPS, VKC) - Active	 Mae, Sally Grandparent (None) - Active
 NewPerson, Test Cousin (None) - Active	 Removal, Baby 01/01/2016 Biological Child (None) - Active	 Smith, Jane 01/01/2016 Biological Child, IH (None) - Active	

**Aardvark, Abigail A., III (9226560) Case Information:** [Please select an action](#)

- [Assets and Income](#)
- [Assignment](#)
- [Background Checks](#)
- [Case/Permanency Plan](#)

[Create Assignment](#)  
[Create Case Note](#)  
[Create Meeting](#)  
[Maintain Participant Information](#)

- 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 section and select 'County/State.' On the left side of the page 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.

The screenshot shows the 'Create Worker Assignment' page in the eWiSACWIS system. The page is divided into several sections:

- Workers List:** A list of workers with their names and positions, each preceded by a 'Select' hyperlink. The list is sorted by Name.
- View By:** A section on the right with radio buttons for 'County/State', 'Employing Entity', 'My County', 'Site/Office', and 'Workers for Supervisor' (which is selected).
- Current Worker:** A section showing the name of the current worker assigned to the case, 'Coke, Caitlin C.'.
- Current Worker Status:** A section with radio buttons for 'Close' and 'Do Not Close' (which is selected).
- Assignment Definition and Details:** A section at the bottom with the following fields:
  - Category: Case
  - For: Aardvark, Amy
  - Participant: Abigail A. Aardvark, III (highlighted with a red box)
  - Start Date: 06/07/2022
  - ☐ Emergency Protective Services Report
- Worker Assignment Table:** A table with the following columns: Worker Name, Type, Responsibility, Role, and a Delete button. The table contains one row:
 

Worker Name	Type	Responsibility	Role	
Abby, Secondary	CPS Initial Assessment	CPS Fam. Serv. - Non-CO	Secondary	<a href="#">Delete</a>

- On the bottom of the page is the Assignment Definition and Details section. 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 section indicates the name of the current worker assigned to the case. The Current Worker Status section 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 section 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 email.

## From Search:

1. Enter the Last Name and First Name or Case ID.
2. Select the 'Participant View' radio button; this will automatically do a search for cases.
3. In the Cases Returned section, expand the case icon for your case.
4. Click the [Actions](#) hyperlink next to the participant you would like to create an assignment for.

The screenshot displays the eWiSACWIS search interface. At the top, there are tabs for 'Case', 'Person', 'Provider Organization', and 'Worker'. Below these is the 'Search Criteria' section with fields for 'Last Name', 'First Name', 'Case ID' (containing '9222933'), 'Site', and 'ZIP Code'. There are checkboxes for 'Date Restricted' and 'View Not Approved/Cancelled'. A 'Participant View' radio button is selected and circled in red. Search precision is set to 'Med' and sort order is 'Alpha'. A 'Search' button is on the right. Below the search criteria, it says 'Record 1 to 1 of 1'. The 'Cases Returned' section shows a list of cases. The first case, 'Aardvark, Amy B. (9222933)', is expanded, showing a list of participants. The first participant, 'Aardvark, Abigail A. III (9226560)', has an 'Actions' link circled in red. Other participants listed include 'Aardvark, Adam A.', 'Aardvark, Amy B.', 'Bluebird, Bennie', and 'Buckeye, The'.

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

The screenshot shows a web browser window with two tabs: 'eWiSACWIS' and 'Actions'. The 'Actions' tab is active. The page has a dark blue header bar with the 'eWiSACWIS' logo on the left and 'Print' and 'Help' links on the right. Below the header is a light blue section titled 'Select Action'. Inside this section are two radio button options: 'Create Assignment' and 'Create Meeting'. At the bottom right of the page are two buttons: 'Continue' and 'Close'.

6. 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 section and select 'County/State.' On the left side of the page 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.
7. On the bottom of the page is the Assignment Definition and Details section. Type, Responsibility, and Role are all drop-down values. Select the appropriate value for the type of case participant assignment to be made for each worker. Remember, there can only be one Primary Assignment.

Sort By: ☒ Name ☐ Position Title

**Workers**

- Select Abby, Alice N Administrative Assistant
- Select Abby, Amy Inactive
- Select Abby, Andy Ann Administrative Assistant
- Select Abby, Mailing Administrative Assistant
- Select Abby, ParentHome Administrative Assistant
- Select Abby, Secondary Administrative Assistant
- Select Abby, Work Administrative Assistant
- Select Abby, Amber's A Administrative Assistant
- Select Agustson, Angel A Inactive
- Select Anderson, Samuel Director
- Select BUFFALO, Supervisor Inactive
- Select Bam, Bam C Inactive
- Select Banana, Brendt Inactive
- Select Cake, Caitlin C Program Manager
- Select Cake, Caitlin C Program Manager
- Select Cedar, Cindy OHC Supervisor
- Select Clark, Supervisor SW Supervisor CPS & JJ
- Select Corn, Conn C Court Liaison
- Select Daisy, Danl Initial Assessment Supervisor
- Select Dane, Supervisor Inactive
- Select Date, Daphne Inactive

**View By**

- ☐ County/State
- ☐ Employing Entity
- ☐ My County
- ☐ Site/Office
- ☒ Workers for Supervisor

**Current Worker**

Cake, Caitlin C.

**Current Worker Status**

☐ Close

☒ Do Not Close

**Assignment Definition and Details**

Category: Case For: Aardvark, Amy Participant: Abigail A. Aardvark, III Start Date: 06/07/2022

☐ Emergency Protective Services Report

Worker Name	Type	Responsibility	Role	
Abby, Secondary	CPS Initial Assessment	CPS Fam. Serv. - Non-CO	Secondary	<a href="#">Delete</a>

[Assign](#) [Close](#)

8. The Current Worker section indicates the name of the current worker assigned to the case.
9. The Assignment Definition and Details section 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).
10. Once completed, click on the Assign button. eWiSACWIS will create a new assignment and notify all workers newly assigned to the case via email.