



Services | CSS Administration

Involvement Reallocation

The **Involvement Reallocation** process is a wizard that enables you to reallocate multiple involvements from one Caseworker to another Caseworker or from one Administrative Officer to another Administrative Officer.

Permissions to reallocate involvements are granted via **Tools | Permissions | User Group Processes | CSS Administration**.

The following business rules apply when reallocating an involvement:

- The recipient of the involvement must be in the same **Establishment** as the existing Caseworker or Administrative Officer.
- You cannot reallocate an involvement to a person with a different **Role**.
- If the person is a Caseworker and an Administrative Officer, the wizard has to be used twice, once for each role.

After the involvement has been reallocated, you can save and the print the details.

Reallocating an Involvement

Involvement Reallocation Wizard (1 of 5)

1. Select **Focus | Services | CSS Administration | Involvement Reallocation** to display the **Select User to Reallocate From** dialog.
2. Highlight a record to select a Caseworker or an Administrative Officer.
3. Click the **Next** button to display the **Select Involvements to Reallocate** dialog.

Drag a column header here to group by that column.

Use the filter functionality to set filters against the data.

Service Team	Post	Surname	Forename	Role
Service Team	Post 1			Admin/officer
Service Team	Post 1			Caseworker

Involvement Reallocation Wizard (2 of 5)

1. Select the **Reallocate** check box next to the involvement to be reallocated, you can reallocate multiple involvements. Select the **Reallocate** check box in the header panel to select all of the involvements.
2. Click the **Next** button to display the **Select User to Reallocate to** dialog.

Reallocate	Subject	Current Base	Involvement Form	Status	Start Date	End Date	Service Team	Caseworker	Admin Officer	Case File	Case Status	Primary Reason
<input checked="" type="checkbox"/>	Band School SEN Statement Review	Active	05/03/2013									
<input type="checkbox"/>	Band School SEN Statement Review	Active	05/03/2013									Communication...
<input type="checkbox"/>	Band School SEN Tribunal Involvement	Active	19/03/2013									Learning Difficulty...
<input type="checkbox"/>	Band School SEN Standalone Review	Active	11/03/2013									Communication...

Involvement Reallocation Wizard (3 of 5)

1. Highlight a record to select a Caseworker or an Administrative Officer.
2. Click the **Next** button to display the **Effective Dates** dialog.

Service Team	Post	Surname	Forename
Service Team	Post 1		
Service Team	Post 2		

Involvement Reallocation Wizard (4 of 5)

1. Select the **Effective End Date of Old User**.
2. Select the **Effective Start Date of New User**.
3. Click the **Next** button to display the **Review** dialog.

Effective End Date of Old User: 24/06/2013

Effective Start Date of New User: 25/06/2013



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Involvement Reallocation Wizard (5 of 5)

The review dialog displays read-only details about the involvement reallocation.

Click the **Back** button to return to the previous screens to make any changes.

Click the **Finish** button to display the following message:
Are you sure you want to reallocate this involvement?

Clicking the **Yes** button displays the following message:
Involvement successfully reallocated.

Saving and Printing an Involvement Reallocation

After the involvement has been reallocated, the following message displays:

Do you want to save and print the allocated details?

1. Click the **No** button to end the process and return to the **My Home Page**.
Click the **Yes** button to display the **Save and Print Reallocation As** dialog.

2. Select a location to save the file.
3. Enter a **File Name**. The file can only be saved as a .XML.
4. Click the **Save** button. The file is saved and the detailed document displays on screen.

Service Team	Post	Surname	Forename	Role
2-Educational-Psychology-Service	Education-Psychologist	[Redacted]	[Redacted]	Caseworker

Subject	Involvement Form	Status	Start Date	End Date	Service Team	Caseworker	Admin Officer	Case File Number	Case Status
[Redacted]	Generic-CSS-Involvement	Active	08/05/2003	[Redacted]	2-Educational-Psychology-Service	[Redacted]	[Redacted]	[Redacted]	[Redacted]

Service Team	Post	Surname	Forename	Role
2-Educational-Psychology-Service	Education-Psychologist	[Redacted]	[Redacted]	Caseworker

5. Select the **File | Print** button to print the document.



Related Reference Guide:

- RG_Online_Common_Filters and Print