

Services | CSS AdministrationInvolvement 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

Drag a column header here

to group by that column.

Use the filter functionality to set filters against the data.

Involvement Reallocation Wizard (1 of 5)

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

Involvement Reallocation Wizard (2 of 5)

- 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.
- Click the Next button to display the Select User to Reallocate to dialog.

Select User to Reallocate From Drag a column here to group by this column. Service Team Post Surname Forename Contains: C



Involvement Reallocation Wizard (3 of 5)

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

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.

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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.

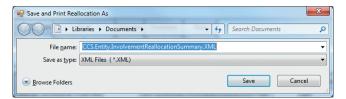
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Saving and Printing an Involvement Reallocation

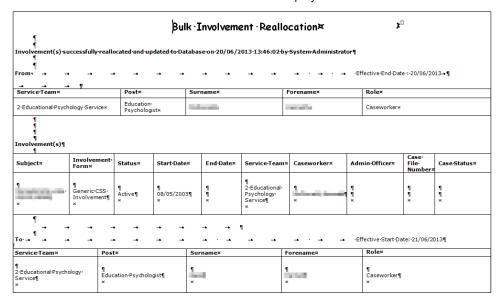
After the involvement has been reallocated, the following message displays:

Do you want to save and print the allocated details?

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.



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



Related Reference Guide:

RG_Online_Common_Filters and Print

