Handout 9: Transferring a Case

Depending on its classification, a case may need to be reassigned to the staff member responsible for the next step. A CWA staff member can use the **Reassign Existing Cases** page to reassign a case.

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Figure 1: Reassign Existing Cases page

- 1. Navigate to the **Reassign Existing Cases** page (figure 1).
- 2. Click on the **magnifying glass** icon next to the **Office** field to view the roles assigned to the case. A **List of Values** pop-up box opens.
- 3. Select the correct role from the list.
- 4. Click the **OK** button.
 - The case appears in the **Select Case(s)** grid. The name of the staff member currently assigned to the case displays along with the **Case ID** number and the names of the **CP** and **NCP**.

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Figure 2: Reassign Existing Cases page

• A list of CWA staff members with their relevant roles will appear in the Assign to Worker and Select Worker to assign the case(s) to grid.

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Figure 3: Reassign Existing Cases

- 5. In the **Select Case(s)** grid, **Select** column, click in the box next to the case number to be transferred (figure 3).
- 6. In the **Assign to Worker and Select Worker to assign the case(s) to** grid, in the **Select** column, click in the box next to the staff member to whom the case is being transferred.
- 7. Click the **Update** icon.
 - The staff member selected is now assigned to the case, and his or her name is shown in the Select Cases grid (figure 4).

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Figure 4: Worker Assigned