

## AXED – Assignments/Transfers Detail

This screen allows a worker or supervisor to assign or transfer a client, report or facility to another worker, give shared access to another worker, or grant temporary read-only access to another worker.

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CAFSAXED          ASSIGNMENTS/TRANSFERS DETAIL      07/18/2016      12:19
USER ID : C74142SW

PROCESSING CLIENT : 0001656
                  NAME : DOE, BRANDY

FUNCTION : T (ENTER A=ASSIGN, T=TRANSFER,
              R=READ ONLY, S=SHARE)
COURTESY SUPERVISED?:
FROM USER : C74142SW DEE, TWEEDLE
TO USER   : C74142W  WORKER, SOCIAL

TYPE      : P (T=TEMPORARY, P=PERMANENT)

ENTER START DATE OF TRANSFER
              OR CLIENT EFFECTIVE DATE: 07/18/2016
              END DATE: 99/99/9999

IS THIS A PRIVATE ADOPTION AGENCY CLIENT (Y/N)? : N

FS900354 TO CONFIRM, PRESS F16(SHIFT+F4) . PATH: _
```

**Field Descriptions** (F12) indicates code lookup is available.

### *ENTER ENTITY TYPE BEING PROCESSED*

Enter the appropriate code for the ID you are working with. Enter a “C” for client, “F” for facility, “P” for person or “R” for report. *The process of assigning a CAPS ID to a worker for the first time is what makes them a client. Once a CAPS ID has been assigned to a worker, they are always considered a client (C).*

### *PROCESSING*

Enter the ID for the entity type you are processing. Enter a CAPS ID if this is a client, a provider/facility number if this is a facility, a CAPS ID if this is a person or a report number if this is a report.

### *NAME*

This field will display the name that is associated to the ID you entered in the processing field.

### *FUNCTION*

Enter an "A" to assign, "T" to transfer, "R" to grant read-only access, or "S" to grant shared access.

### *COURTESY SUPERVISED*

This field is only required when sharing a client. Enter "Y" if the worker you are sharing this client with will be courtesy supervising the client, or "N" if not.

### *FROM USER*

This field will display the C number of the current assigned worker. *This field will be blank if the entity type is "P" (Person).*

### *TO USER*

Enter the C number of the worker you are assigning access to.

### *TYPE*

Enter the type of access you are granting. Enter a "T" to grant temporary access or a "P" to grant permanent access.

### *ENTER START DATE OF TRANSFER OR CLIENT EFFECTIVE DATE*

For assignments, enter the date service or placement began with this person. For transfers, this date will default to current date and cannot be changed. For granting read-only or shared access, this date will default to current date but can be changed.

### *END DATE*

Enter the date the temporary access will end. *This is only required if a "T" is entered in the type field. For example, to grant temporary access to a client you may enter a start date of 4/1/07 and an end date of 5/15/07.*

### *IS THIS A PRIVATE ADOPTION AGENCY CLIENT (Y/N)?*

Enter a "Y" if this person/client was adopted through a private adoption agency. Enter an "N" if this person/client was not adopted through a private adoption agency. *This is only required if the entity type being processed is "P" (person) or "C" (client).*

### **Additional Information**

The F10 key allows you to select other persons from the RELL (Relationship List) screen so multiple persons can be assigned to a worker at one time.

Assignments = this grants permanent access to your C number. Supervisors can also assign a client to one of their worker's caseloads.

Transfers = this grants permanent access to another worker. Supervisors can also transfer from one of their workers to another worker. You cannot transfer a client if 1) there are any services pending approval on the SERL (Services List) screen or 2) if there are any payments in Unapproved, Incomplete or Mailed status.

Shared = this grants temporary or permanent update access to another worker who normally would not have update access due to system security. Shared access can be granted to multiple workers. Only the assigned worker (and his or her supervisor) can grant shared access. The Courtesy Supervised field can only be used if sharing a client.

Read-only = this grants temporary read-only access. Workers given this access will only be able to inquire – no add, modify or delete will be allowed. Workers can grant read-only access to another worker or a worker can grant read-only access to their ID and an alert will be sent to the assigned worker. Read-only access can only be granted for a maximum of five (5) days at a time.