Resource Management

Managing Offices
Staff and
Caseload Functions

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CWS/CMS
Managing Office / Staff / Caseload Functions
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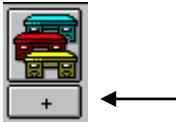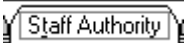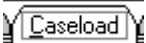
Creating a New Worker in CWS/CMS

Open Resource Management	
Open Existing Office	Open the Office that you want the Worker assigned to.
Create New Staff Person **ID** **Specialties** **Caseload** ← **SKIP THIS PAGE** **Logon** **Staff Rights**	Complete all YELLOW fields on the **ID** page. Record language and functional specialties on the **SPECIALTIES** page. To create the Worker's **LOGON**, use the + sign to start. Select the domain the worker will be assigned to and enter the county's generic password. **The system will automatically generate the worker's logon ID** - based on the first and last name of the worker. Use the + sign to assign privileges to the worker on the STAFF RIGHTS page.

Authorities for Routine Activities of a Social Worker:

Access	Interface	Override Authority	Limited Access
Closed Case/Referral Update	LIS	Countywide Read	Probably Not
CWS Case Mgt System	MEDS	Countywide Read/Write	
	CDS Client Index		

If a Worker Licenses Placement Homes - ADD:
County License Case Management
Resource Management
Resource Management Placement Facility Maintenance
Adoption Workers should have all above privileges including Adoptions.

SAVE TO DATABASE

Creating a New Unit
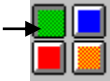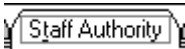
Open Resource Management 	
Open Existing Office 	Open the office where the new unit is to be located.
Create New Assignment Unit: 	
	Record Unit Name and specialties here.
Staff Authority	Use the Plus sign to activate the page, add Supervisor and any worker's that will be a part of the unit.
Caseload **SAVE TO DATABASE**	Use the Plus sign to add Caseloads to the new unit.

Creating a New Caseload

|	
Open Resource Management 	
Open Existing Office 	Open the office that contains the unit that will carry the new caseload.
Open the Assignment Unit that the caseload will be assigned to: **SAVE TO DATABASE**	Use the + sign to activate the page. Complete the YELLOW field with the new caseload's name. Note: New caseloads are automatically assigned to the Unit Supervisor.

This action does NOT assign a caseload to a worker!

Add a Worker to a Unit

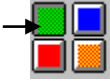|	
Open Resource Management 	
Open Existing Office 	Open the Office that the Worker is in.
Open the Assignment Unit that the worker will be assigned to: **SAVE TO DATABASE**	Add a worker to a unit here: Be sure that you have the office open that the worker was created in. On the STAFF AUTHORITIES page - use the + sign to add the worker to the unit. Assign the proper authorities to the worker.

This action assigns a worker to a unit only, it does NOT give them a caseload!

Assigning/Reassigning a Caseload to a Worker

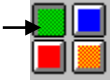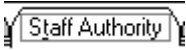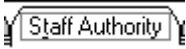|	
Open Resource Management	
Open Existing Office	Open the office or offices that contain the worker's you will be reassigning the caseload from and to.
ACTION **Reassign Caseload** **SAVE TO DATABASE**	Under the **ACTION** menu – use the '**Reassign Caseload'** command. A dialog box will appear: you will select the office, staff person who is currently assigned the caseload, and the caseload name. Then select office and staff person who you want to reassign the caseload to – and click **ADD**.

Transfer Staff from one Office to another Office

A worker cannot be transferred to another unit or office if they have a caseload assigned to them. Reassign the caseload, then start the transfer process.

Open Resource Management	
Open Existing Office	Open the office(s) that contains the unit(s) that worker is currently assigned to and will be moved to.
Open the Staff Person that will be transferred:	Select the worker(s) who will be transferred.
ACTION **TRANSFER STAFF** **SAVE TO DATABASE**	In the Transfer Staff dialog box, select the Office the worker(s) is/are currently assigned to. Then select the Office where the worker(s) will be moved to. Highlight the worker(s) name(s), and use the add button to move them. **TRANSFER STAFF PASSWORD** dialog box will prompt you to enter an initial password for the worker. If multiple workers have been transferred, this box will appear multiple times populated with the first password – it can be changed for each person if desired.

Transfer Staff to Another Unit within Same Office

A worker cannot be transferred to another unit or office if they have a caseload assigned to them. Reassign the caseload, then start the transfer process.

Open Resource Management	
Open Existing Office	Open the office(s) that contains the unit(s) that worker is currently assigned to and will be moved to.
Open the Unit where the worker is currently assigned.	**Remove the worker from the current unit:** On Staff Authority page, highlight the workers name, and use the Delete key to take them out of this unit.
Open the Unit where the worker will be reassigned. **SAVE TO DATABASE**	**Add the worker to the new unit:** On the Staff Authority page, use the plus button to begin, then select the worker's name from the drop down.

This action assigns a worker to a unit only; it does NOT give them a caseload!

MOVING CASES
ASSIGNMENT / TRANSFER

OPEN CASELOAD to do these functions:

MAKE ASSIGNMENT	ACTION **MAKE ASSIGNMENT**
[Make Assignment dialog screen]	Use this screen to make Secondary and Read Only assignments to a case or referral. **SAVE TO DATABASE**

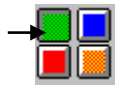| TRANSFER ASSIGNMENT	ACTION **TRANSFER ASSIGNMENT**
[Transfer Assignment dialog screen]	Use this screen to transfer Primary or Secondary assignment of a case or referral to another worker. Multiple cases can be moved at the same time. **SAVE TO DATABASE**

Reset Password

Open Resource Management	
Open Existing Office	Open the office that contains the worker you want to reset.
Open the Staff Person that will be reset:	Select the worker to reset. Click on the LOGON page.
ACTION **RESET PASSWORD** **SAVE TO DATABASE**	The Reset Password dialog box will appear. Type in the new password and confirm it.

Ending a Worker

A worker cannot be end dated if they have a caseload assigned to them. Reassign the caseload, then start this process. If the worker is a Licensing Worker, licensing cases must also be reassigned.

Open Resource Management	
Open Existing Office	Open the Office that the Worker is in.
Open the Assignment Unit that the worker is to be removed from.	On 'Staff Authority' page, highlight the worker, and use the Delete key.
Open the Worker to be End Dated: **SAVE TO DATABASE**	Record the End Date.