



TM DYS – CM – Manage Assignment and Transfer History Job Aid

Users

- DYS Client Manager or DYS Client Manager Supervisor

Process

This Job Aid table describes the actions needed to manage the Assignment and Transfer History from the Client Manager Detail page.

Related Job Aids

- *TM DYS_CM – Access/View Client Manager*

Introduction

- The supervisor is able to Assign a Client Manager to the DYS Case.
 - The Client Manager dropdown options include all Client Managers affiliated to the same region as the Youth. The Region of Youth cannot be changed.
 - If there was previously a Client Manager assigned, their assignment End Date automatically sets as the Start Date of the new Client Manager.
- The supervisor can Transfer the Client Manager Detail (DYS Case) to a different Region.
 - Once the Transfer has been added, the system automatically updates the Region of the Youth field on the Client Record.
 - The Client Manager assignment is changed to unassigned, with today's date as the Start Date. The Client Manager Detail appears in the CM Supervisor Caseload Queue of the new region.
 - If there was previously a Client Manager assigned, their End Date automatically sets as the Start Date of the new unassigned record.
- When assigning a new Client Manager, the system checks to see if the Parole Officer is populated. If it is, then the newly assigned Client Manager is also assigned as the Parole Officer.
 - If there was previously a Parole Officer assigned, their End Date automatically sets as the Start Date of the new Parole Officer.

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Access and View Assignment and Transfer History

- The default sort is the most recent by Start Date.

Steps/Output	Screenshot																																																						
<p>In the <i>Left Navigation Panel</i>:</p> <ol style="list-style-type: none"> Click Assignment and Transfer History. <p>This navigates to the <i>Assignment and Transfer History</i> section.</p>	<table border="1"> <thead> <tr> <th>Start Date</th> <th>End Date</th> <th>Assigned To</th> <th>Responsibility/Role</th> <th>Region</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>2/26/2020</td> <td></td> <td>Dys-Admissions Hodtest25</td> <td>Client Manager</td> <td>Northeast</td> <td>test</td> </tr> <tr> <td>1/13/2020</td> <td>2/26/2020</td> <td>Donald Smith</td> <td>Client Manager</td> <td>Northeast</td> <td></td> </tr> <tr> <td>7/16/2019</td> <td>8/16/2019</td> <td>Richard Champion</td> <td></td> <td></td> <td></td> </tr> <tr> <td>7/1/2019</td> <td>7/2/2019</td> <td>Marty Henrichs</td> <td></td> <td></td> <td></td> </tr> <tr> <td>6/28/2019</td> <td>1/13/2020</td> <td>Anthony Burroughs</td> <td>Client Manager</td> <td>Northeast</td> <td></td> </tr> <tr> <td>6/18/2019</td> <td>7/1/2019</td> <td>Tegan Wilson</td> <td></td> <td></td> <td></td> </tr> <tr> <td>6/16/2019</td> <td>7/9/2019</td> <td>Magdalena Subia</td> <td></td> <td></td> <td></td> </tr> <tr> <td>6/15/2019</td> <td>6/28/2019</td> <td>Dyc Unassigned</td> <td>Client Manager</td> <td></td> <td></td> </tr> </tbody> </table>	Start Date	End Date	Assigned To	Responsibility/Role	Region	Comments	2/26/2020		Dys-Admissions Hodtest25	Client Manager	Northeast	test	1/13/2020	2/26/2020	Donald Smith	Client Manager	Northeast		7/16/2019	8/16/2019	Richard Champion				7/1/2019	7/2/2019	Marty Henrichs				6/28/2019	1/13/2020	Anthony Burroughs	Client Manager	Northeast		6/18/2019	7/1/2019	Tegan Wilson				6/16/2019	7/9/2019	Magdalena Subia				6/15/2019	6/28/2019	Dyc Unassigned	Client Manager		
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Add Assignment

Steps/Output	Screenshot
<p>In the <i>Assignment and Transfer History</i> section:</p> <ol style="list-style-type: none"> 1. Click the Actions drop-down. 2. Select Add Assignment from the drop-down. <p>The <i>Add Assignment</i> pop-up window displays.</p>	
<p>In the <i>Add Assignment</i> pop-up window:</p> <ol style="list-style-type: none"> 3. Click the drop-down under Assign To* and select a Client Manager. 4. Enter Start Date*. 5. Update any additional information as needed. 6. Click Add to save the assignment or Cancel to close without saving. 	



TM DYS – CM – Manage Assignment and Transfer History Job Aid

This saves the update and returns you to the *DYS Client Manager Detail Screen*.

The screenshot displays the 'Assignment and Transfer History' section of the CDHS Client Manager interface. The interface includes a sidebar menu on the left with various options like 'Youth Info', 'Collateral', and 'Assignment and Transfer History'. The main content area shows a table with columns for Start Date, End Date, Assigned To, Responsibility/Role, Region, and Comments. The first row is highlighted with a red box, indicating the current assignment.

Start Date	End Date	Assigned To	Responsibility/Role	Region	Comments
3/16/2020		Tara Wass	Client Manager	Southern	dfghjk
1/9/2020		Jessica Peters			
1/7/2020	3/16/2020	Nicole Lator	Client Manager	Southern	
5/30/2019	1/22/2020	Tanya Hubbard			
2/28/2019	4/23/2019	Tanya Hubbard			
1/22/2019	1/7/2020	Dyc Unassigned	Client Manager		



TM DYS – CM – Manage Assignment and Transfer History Job Aid

Add Transfer

Steps/Output	Screenshot
<p>In the <i>Assignment and Transfer History</i> section:</p> <ol style="list-style-type: none"> 1. Click the Actions drop-down. 2. Select Add Transfer from the drop-down. <p>This opens the <i>Add Transfer</i> pop-up window.</p>	
<p>In the <i>Add Transfer</i> pop-up window:</p> <ol style="list-style-type: none"> 3. Select Region*. 4. Enter as much information as available. 5. Click Add to save the assignment or Cancel to close without saving. 	



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A Warning – Adding this Transfer will automatically update the Region of the Youth on the Client Record. Are you sure you want to proceed? message will appear.

- Click **Yes** to add the transfer or **No** to close without saving.

Start Date	End Date	Assigned To	Responsibility/Role	Region	Comments
3/16/2020		Tara Wass	Client Manager	Southern	dfghjk
1/9/2020		Jessica Peters			
1/7/2020	3/16/2020	Nicole Lator	Client Manager	Southern	
5/30/2019	1/22/2020	Tanya Hubbard			
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Start Date	End Date	Assigned To	Responsibility/Role	Region	Comments
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3/16/2020	3/16/2020	Tara Wass	Client Manager	Southern	dfghjk
1/9/2020		Jessica Peters			
1/7/2020	3/16/2020	Nicole Lator	Client Manager	Southern	
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2/28/2019	4/23/2019	Tanya Hubbard			
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