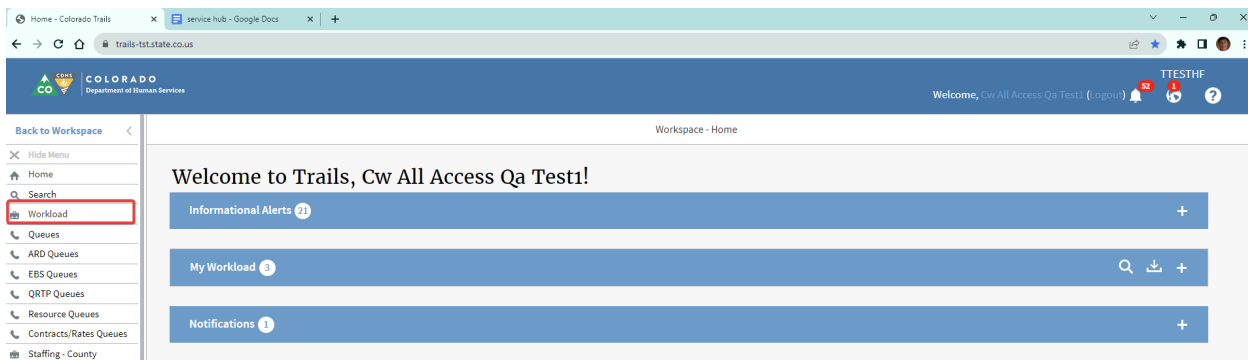




Trails Modernized Workload Tip Sheet

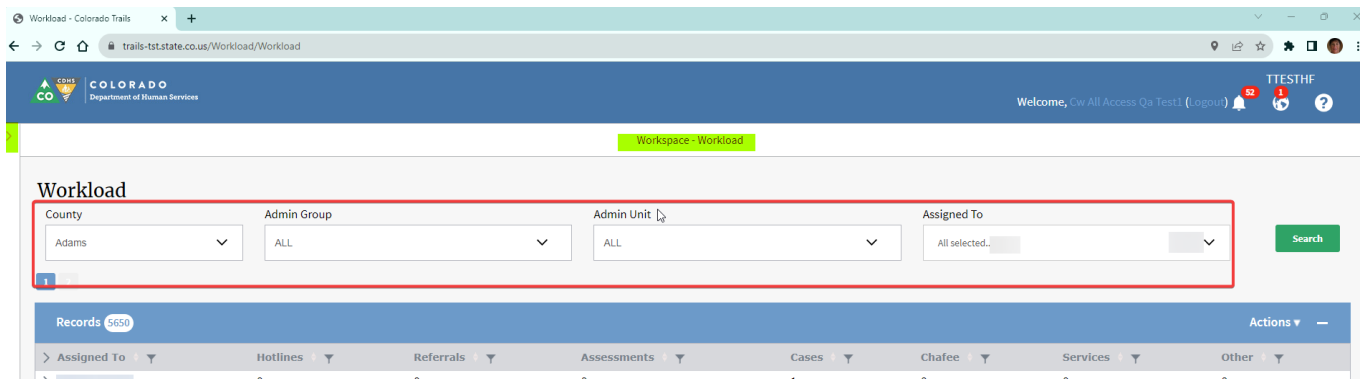
The workload page was scheduled to be implemented in Trails Modernization once the Case functionality was released. It has been determined that it should be released sooner so users can take advantage of the needed functionality it contains.

Below, a user will find the Workload menu item on the left navigation menu.



When a user clicks on the Workload menu option, the Workload panel will load.

- Supervisors:
 - Will default to the Primary Affiliated county
 - Admin Group, Admin Unit, and all the workers selected that fall in these filters
- Non-supervisors:
 - Will default to Primary Affiliated county
 - Admin Group, Admin Unit and only them in the Assigned To: filter



Records: Displays the number of total records that the user is assigned to. The Record Id's are the assigned number to that record type.

Menu bar: Allows the user to sort and filter on each of the menu items. Assigned To: either as a primary or secondary worker/user.

The Records under each worker will be the same records that the user sees every day in Trails Legacy in their Workload. Below is the comparison of those records and workload which indicate the type and sub type description.

Header Bar: Each of the Record Types will show a number that indicates the total number of records for the Record Type.

Records 8									Actions
Assigned To	Hotlines	Referrals	Assessments	Cases	Chafee	Services	Preventions		
> Theresa Campbell	0	0	2	2	1	2	1		

Open and Assigned to a user that are not closed (pending supervisor approval for closure)

Hotlines: Pending Hotlines that have not been disposed or waiting for a Supervisor Approval

Referrals: Referrals that are still open and/or pending supervisor approval

Assessments: Open Assessments

Cases: Open Traditional Cases

Chafee: Open IL (Independent Living) Cases

Services: Open Providers and their related Services

Preventions: Open PA3 Prevention cases

Case / Referral / Other Listing				
ID	R	Type	Sub Type	Name
3434692		Assessment		
3434643		Assessment		
1986856		Case	Traditional	
1961926		Case	Prevention	
1999125		FAR	FAR	
1959855		Independent I	Traditional	
1716083		Service		OOH, [redacted]
1525209		Service		ADOPT, [redacted]

<input type="checkbox"/>	Record ID	Record Type
<input type="checkbox"/>	3434643	Assessment - PA5CP
<input type="checkbox"/>	3434692	Assessment - INABN
<input type="checkbox"/>	1959855	Case - Chafee/IL
<input type="checkbox"/>	1999125	Case - FAR
<input type="checkbox"/>	1986856	Case - Traditional
<input type="checkbox"/>	1961926	Prevention
<input type="checkbox"/>	1525209	Provider-ADOPT
<input type="checkbox"/>	1716083	Provider-OOH

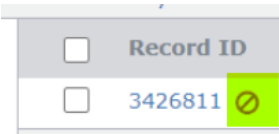
The secondary Header Bar will allow the user to Sort and/or Filter to find specific records.

Workload

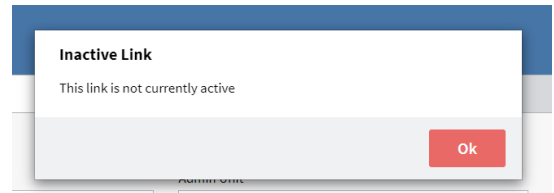
County: La Plata | Admin Group: ALL | Admin Unit: ALL | Assigned To: Cw Supervisor Qa Test19 X | Search

Records 9										Actions
Assigned To	Hotlines	Referrals	Assessments	Cases	Chafee	Services	Preventions			
> Cw Supervisor Qa Test19	0	0	2	2	1	3	1			
<input type="checkbox"/>	Record ID	Record Type	Name	Date Assigned	Responsibility	Admin Group	Admin Unit	County		
<input type="checkbox"/>	3423018	Assessment - PA5CP		08/28/2023	Primary	Intake I - Burbidge	Response II - Reinhardt	Adams		
<input type="checkbox"/>	3432231	Assessment - PA5CP		08/24/2023	Secondary - Case Aid			La Plata		
<input type="checkbox"/>	1959855	Case - Chafee/IL		08/22/2023	Primary			La Plata		
<input type="checkbox"/>	1999125	Case - FAR		08/22/2023	Primary			La Plata		
<input type="checkbox"/>	1851233	Case - Traditional		08/28/2023	Primary			La Plata		
<input type="checkbox"/>	1961926	Prevention		08/22/2023	Primary			La Plata		
<input type="checkbox"/>	1525209	Provider-ADOPT		08/22/2023	Primary - Certification Worker	Intake I - Burbidge	Response II - Reinhardt	Adams		
<input type="checkbox"/>	1618867	Provider-KFSTR		08/28/2023	Primary - Certification Worker	Intake I - Burbidge	Response II - Reinhardt	Adams		
<input type="checkbox"/>	1716083	Provider-OOH		08/22/2023	Primary - Certification Worker	Intake I - Burbidge	Response II - Reinhardt	Adams		

Restricted records: If a record is restricted, it will have the restricted symbol next to that record id.



Record Type: Case and Assessment, the hyperlink is not Active

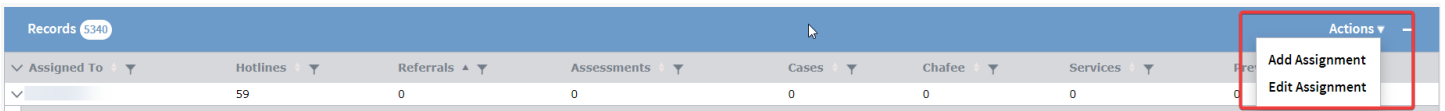


Actions Menu:

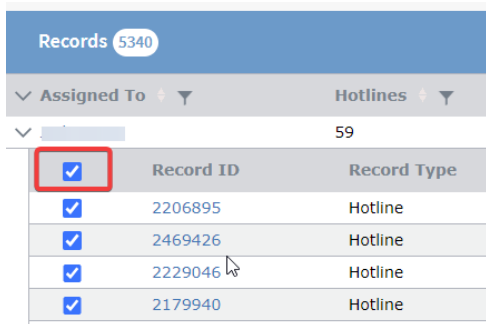
This is where the user can Add Assignments or Edit Assignments, either individually or for multiple records depending on the situation.

Note: Security Administrators will have the ability to do assignments using these Action features.

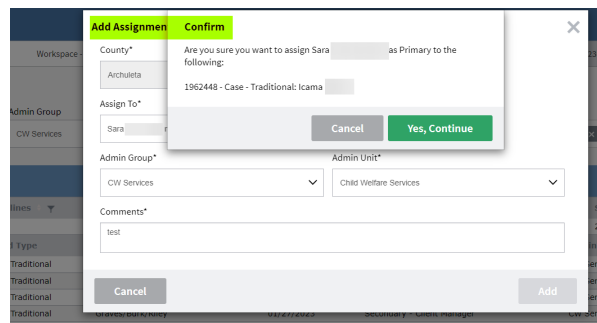
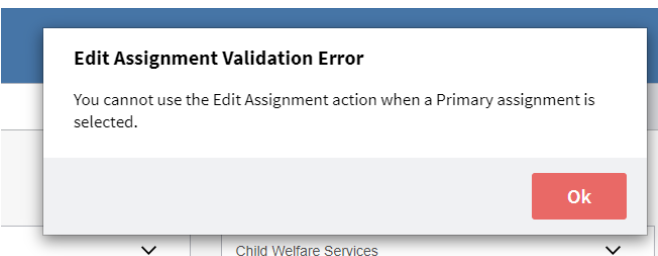
Actions: Add Assignment:



Checkbox: If you check the header checkbox, it will select ALL the records if you do not want to check them individually.



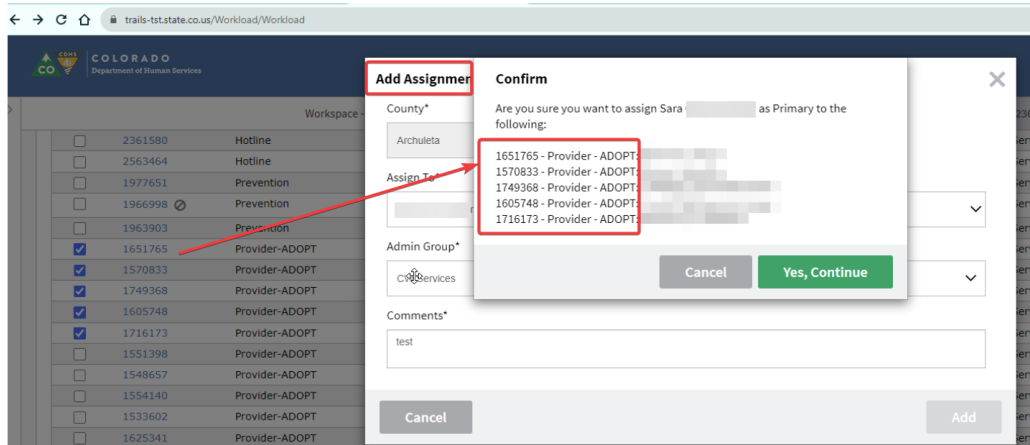
- A user can Add a Primary Assignment only, not Edit a Primary Assignment.



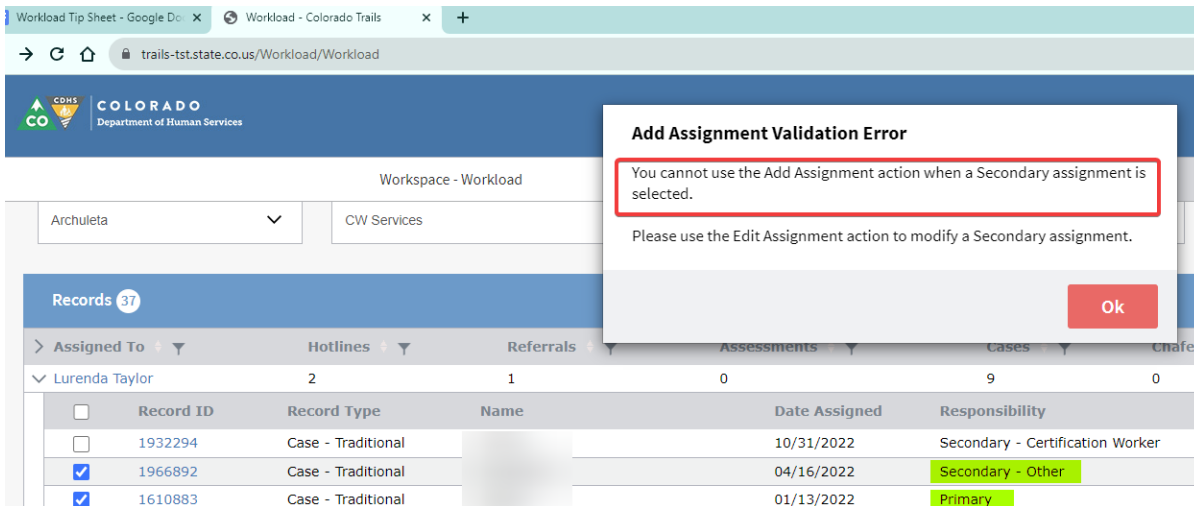
- When you do select one or more items for an assignment change:
 - A confirmation box will appear to confirm the number of items being transferred and a message stating, "Are you sure you want to assign [Worker Name, Job Title] as Primary to the following:"
 - Records will be listed in the confirmation message, and will show the Trails/Record ID, Type and Name.

- Buttons

- Yes, Continue- Trails will bring up Add Assignment modal to continue with assignment of the selected items
- Cancel - Closes the message and the user returns to the workload page



If you select Records that include both 'primary' AND 'secondary' responsibility, Trails will display a warning informing the user that Primary AND Secondary records cannot be transferred simultaneously:



Actions: Edit Assignment:

The Edit Assignment modal only **allows editing of a single 'Secondary' responsibility** at a time. The Edit Assignment module allows a user to End the Secondary Assignment, change the Secondary Role, Select/unSelect Clients and/or modify Comments.

You cannot Edit a Primary Assignment, you can only Add a Primary Assignment

