

Managing the Financial Workload for Supervisors



Knowledge Base Article

Managing the Financial Workload for Supervisors

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Managing the Financial Workload for Supervisors

Overview

The **Financial Workload** functionality is an Ohio SACWIS tool that helps you manage eligibility, reimbursability, and adoption subsidy records. Although use of this functionality is optional, the system is designed to automatically assign and terminate workload assignments as needed. IV-E supervisors assign, un-assign, or transfer these system-automated assignments. Refer to the **Using Automatic Assignment and Termination Functionality** sub-section for more information.

In Ohio SACWIS, the Financial Workload is separated in two Title I-V-E areas: **Foster Care Maintenance (FCM)**, **Prevention Services**, **Adoption Subsidy** and **KGAP**. The navigation links within each area function the same way, but the data differs based on the workload selected.

Specifically, the Financial Workload functionality provides the following benefits, it:

- Allows Eligibility Specialists and supervisors to manage their work assignments.
- Enables Eligibility Supervisors to view entire Adoption Subsidy and FCM workload(s) for their workers and for other IV-E Supervisors and their workers.
- Allows Eligibility Supervisors to **assign, reassign, and transfer** records of IV-E eligible children to IV-E Eligibility Specialists within their agency.
- Aids in quickly identifying the Eligibility Specialist responsible for a given child.
- Allows Supervisors to search for specific children by their person ID.
- Includes a system-automated feature for the assignment and termination of Adoption Subsidy or FCM records.
- Displays an assignment grid overview of the child's record(s) showing the Child's Name / ID / Gender / DOB, Case ID, Eligibility Type / Indicator, Reimbursability Indicator / Eff-End Date, Custody Start Date and Next Review.
- Provides links to give Eligibility Specialists and Supervisors quick access to a child's IV-E records to view or complete necessary reviews. Links also provide access to a child's Person Profile, Case Information, and Payment History.

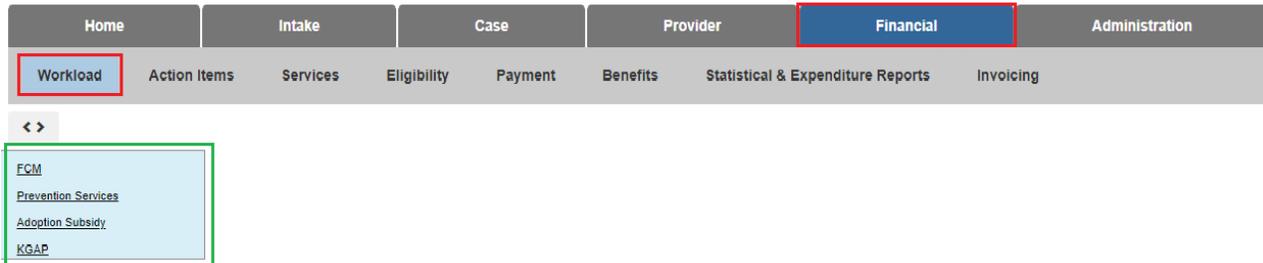
Note: Notifications pertaining to **FCM** or **Adoption Subsidy** records are sent only to the assigned Eligibility Specialist(s). If no Eligibility Specialist is assigned, the system sends notifications to all Eligibility Specialists within that agency.

Managing the Financial Workload for Supervisors

Required Security Profiles

To access the **Financial Workload**, supervisors need the security profiles of **Eligibility Specialist Workload** and **Eligibility Specialist Assignments**.

Once on the **Financial Workload** screen, the following four links appear in the **Navigation** menu: **FCM**, **Prevention Services**, **Adoption Subsidy** and **KGAP**.



Using Automatic Assignment and Termination Functionality

The Automatic Assignment and Termination functionality was added to help IV-E supervisors manage work items. However, system-automated assignments won't prevent other IV-E workers from viewing or editing IV-E records. The records are available to those with the appropriate security profile.

As mentioned previously, IV-E supervisors can **un-assign, reassign or transfer** the automated assignments to other IV-E workers.

The following are auto-assignment and auto-terminate Ohio SACWIS Business Rules:

For FCM Eligibility Records

- Automatic assignment to an eligibility specialist occurs when the **Determine Eligibility** button in the Eligibility record is clicked. For example, if a worker adds information to a pending eligibility record and clicks the **Determine Eligibility** button without saving the record, that person is assigned even if the determination is **No**. If a second worker makes changes to the pending eligibility record and clicks the **Determine Eligibility** button without saving the record, that person is assigned as well. The IV-E supervisor has the ability to un-assign, reassign or transfer the assignments.
- Automatic IV-E worker assignment termination occurs when a custody episode ends or when the child's case is transferred to another agency.

For Adoption Subsidy Records

- Automatic assignment to an eligibility specialist occurs when that worker completes an adoption subsidy eligibility record, and the record is saved with an **Approved** status.
- Automatic IV-E worker assignment termination occurs when an adoption subsidy end date is reached. The automatic assignment termination occurs at the end of the following month.

Managing the Financial Workload for Supervisors

- A delay in ending the adoption subsidy worker assignment is given in case an extension of the subsidy is required. When the adoption subsidy has been extended, the system will continue the assignment of the current eligibility specialist.

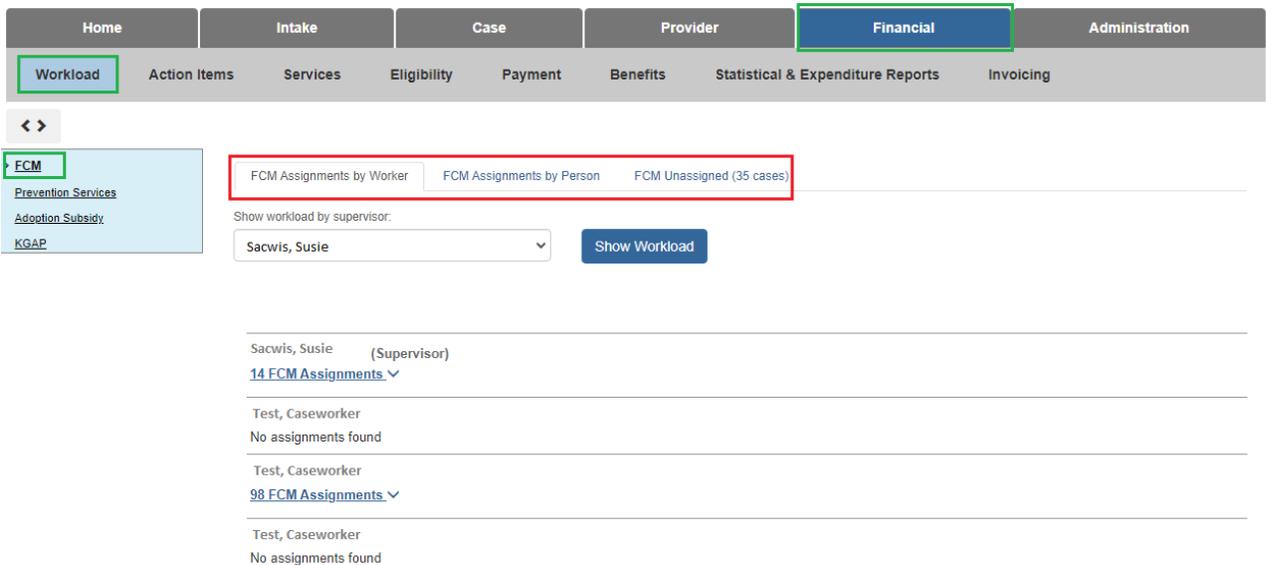
Navigating a Supervisor's Financial Workload Screen

A supervisor will complete the following steps to view **FCM Workload, Prevention Services Workload, Adoption Subsidy Workload or KGAP Workload** information.

1. From the Ohio SACWIS **Home** screen, click the **Financial** tab.
2. Click the **Workload** tab.
3. Click the financial tab you want to view, **FCM, Prevention Services, Adoption Subsidy or KGAP** on the side navigation bar. The functionality is the same for all four workloads.



The **FCM Assignments** screen displays.



Managing the Financial Workload for Supervisors

4. To view **Assignments** for **yourself** or **another worker**, select the appropriate name from the list. The supervisor will be listed first with other workers following.

The screenshot shows a navigation menu with tabs: Home, Intake, Case, Provider, **Financial**, and Administration. Under the Financial tab, there are sub-tabs: Workload, Action Items, Services, Eligibility, Payment, Benefits, Statistical & Expenditure Reports, and Invoicing. The Workload sub-tab is selected. On the left, there is a sidebar with 'FCM' selected, and other options like 'Prevention Services', 'Adoption Subsidy', and 'KGAP'. The main content area shows 'FCM Assignments by Worker' selected, with a dropdown menu for 'Show workload by supervisor:' containing 'Sacwis, Susie'. A 'Show Workload' button is present. Below this, a list of supervisors is shown: 'Sacwis, Susie (Supervisor)' with '14 FCM Assignments', 'Test, Caseworker' with 'No assignments found', 'Test, Caseworker' with '98 FCM Assignments', and another 'Test, Caseworker' with 'No assignments found'.

The **Assignments** for the selected **Supervisor** or **Worker** displays.

The screenshot shows the details for 'Sacwis, Susie (Supervisor)' with '14 FCM Assignments'. Below this, there is a 'Sort' section with a dropdown menu set to 'Child Full Name (A-Z)' and a 'Sort' button. The results show 'Result(s) 1 to 14 of 14 / Page 1 of 1' and 'Results per page: 25' with a 'Go' button. A table of assignments is displayed with the following columns: checkboxes, edit assignment, view payments, Child Name / ID Gender Age DOB, Case Name / ID, Elig Type / Indicator, Reimb Indicator / Eff - End Date, Custody Start Date, and Next Review.

		Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
<input type="checkbox"/>	edit assignment	Lane, Lois / 1234567	Lane, Lois / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
	view payments	Female Age 8, DOB 1/1/2015					
<input type="checkbox"/>	edit assignment	Test, Child / 1234567	Test, Child / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
	view payments	Male Age 6, DOB 11/05/2016					

Managing the Financial Workload for Supervisors

5. Click **Case Name/ID** on an **Assignment** to view the case.

Sacwis, Susie (Supervisor)
[14 FCM Assignments ^](#)

Sort Susie's workload by:
 Child Full Name (A-Z) Sort

Result(s) 1 to 14 of 14 / Page 1 of 1 Results per page: 25 Go

		Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
<input type="checkbox"/>	edit assignment view payments	Lane, Lois / 1234567 Female Age 8, DOB 1/1/2015	Lane, Lois / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
<input type="checkbox"/>	edit assignment view payments	Test, Child / 1234567 Male Age 6, DOB 11/05/2016	Test, Child / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	

Important Information about a Supervisor's Financial Workload Tabs:

- **FCM** display for all children who have an open / current eligibility record.
- **Prevention Services** display for all children who have an open / current prevention service record.
- **Adoption subsidy** tab display for all children who have an open / current adoption subsidy record, regardless if the child's case is open or closed.
- **KGAP** display for all children who have an open / current KGAP eligibility record.
- Workers can only view their own assignments, not those of other workers. However, a supervisor can view assignments for all workers.
- **Assignments** that display in the **Financial Workload** also display on the supervisor's **Assignment Display** screen on their Ohio SACWIS desktop.
- Completion of a work item **removes** the assignment from both the supervisor's **Financial Workload** and from the **Assignment Display** screen on the Ohio SACWIS desktop.
- **Assignments** in the **Financial Workload** function the same way as they do in the worker's **Case Workload**.

Managing the Financial Workload for Supervisors

- **Assignments** can be **removed** by end dating the assignment.

End Dating an Assignment

1. To end date an assignment, click **Edit Assignment**.

Sacwis, Susie (Supervisor)
[14 FCM Assignments ^](#)

Sort **Susie's workload by:**
Child Full Name (A-Z)

Result(s) 1 to 14 of 14 / Page 1 of 1 Results per page:

		Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
<input type="checkbox"/>	edit assignment	Lane, Lois / 1234567 view payments Female Age 8, DOB 1/1/2015	Lane, Lois / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
<input type="checkbox"/>	edit assignment	Test, Child / 1234567 view payments Male Age 6, DOB 11/05/2016	Test, Child / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	

The **Employee Assignment** screen displays.

2. Enter the **Date** in the **End Date** field to end the assignment.
3. Click the **Save** button. You will be returned to the **FCM Assignments** screen.

Managing the Financial Workload for Supervisors

Employee Assignment

Start Date:

End Date:

Comments:

Work Item Reference / ID

[Lane, Lois / 1234567](#)

Employees

Worker Name / ID	Role
Sacwis, Susie	Eligibility Specialist

The assignment is **Removed** from the **FCM Assignments** screen.

Sorting Assignments

You have the option to **Sort** assignments when searching for specific cases by A-Z, Age, Custody Start date, etc.

1. On the **FCM Assignments screen**, select the drop down for **Sort Workload By**.
2. Click the **Sort** button.

FCM Assignments by Worker | FCM Assignments by Person | FCM Unassigned (35 cases)

Show workload by supervisor:

Sacwis, Susie (Supervisor)

[14 FCM Assignments](#) ^

Sort Susie's workload by:

Result(s) 1 to 14 of 14 / Page 1 of 1

Results per page:

Your **Assignments** will appear in the **Sort** order you choose.

Managing the Financial Workload for Supervisors

Reviewing the Grid Layout

The filtered **Results** appear in a **Grid**. For **FCM, Prevention Services, Adoption Subsidy** and **KGAP**, the results include the **Child Name/ID/Gender/Age/DOB** and **Case Name/ID**. In addition, the following grid information appears:

For **FCM**:

- **Elig Type / Indicator:** Column displays an eligibility type of **Initial, Ongoing**, or **Age**. Also, **Yes** or **No** also displays depending on whether child is IV-E eligible.
- **Reimb Indicator Eff/End Date:** Column displays the date of the most recent reimbursement record. Since counties are no longer required to complete an annual redetermination for reimbursability other than for annual reasonable efforts, the date corresponds to the most recent reasonable effort determination – either initial or annual.
- **Custody Start Date:** Column shows when custody began.
- **Next Review:** Column displays the date of the next subsidy review.

Sacwis, Susie (Supervisor)
[14 FCM Assignments ^](#)

Sort Susie's workload by:

Child Full Name (A-Z) ▾

Sort

Result(s) 1 to 14 of 14 / Page 1 of 1
Results per page: Go

		Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
<input type="checkbox"/>	edit assignment view payments	Lane, Lois / 1234567 Female Age 8, DOB 1/1/2015	Lane, Lois / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
<input type="checkbox"/>	edit assignment view payments	Test, Child / 1234567 Male Age 6, DOB 11/05/2016	Test, Child / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	

For Prevention Services

- **Determination Type / Indicator:** Column displays an eligibility type of **Initial, Ongoing** or **Age**. Also, **Yes** or **No** also displays depending on whether child is IV-E eligible.
- **Effective Date:** Column displays the date Prevention Services took effect.
- **Next Review Date:** Column displays the date of the next subsidy review.

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Sacwis, Susie (Supervisor)
[1 Assignments ^](#)

Result(s) 1 to 1 of 1 / Page 1 of 1

Results per page:

		Child Name / ID Gender Age DOB	Case Name / ID	Determination Type / Indicator	Effective Date	Next Review
<input type="checkbox"/>	edit assignment	Test, Child / 12345678	Test, Adult / 12345	Initial / Yes	07/18/2023	
	view payments	Age 4, DOB 08/22/2018				

For Adoption Subsidy

- **Subsidy Type:** Column displays the most recent adoption subsidy record and a hyperlink to the subsidy record.
- **Subsidy Eff-End Dates:** Column displays the begin and end date of the child's subsidy.
- **Next Review Date:** Column displays the date of the next subsidy review.

Sacwis, Susie (Supervisor)
[4 Adoption Subsidy Assignments ^](#)

Subsidy Type:

Sort Susie's workload by:

Result(s) 1 to 4 of 4 / Page 1 of 1

Results per page:

		Child Name / ID Gender Age DOB	Case Name / ID	Subsidy Type	Subsidy Eff - End Date	Next Review
<input type="checkbox"/>	edit assignment	Test, Child / 456789	Test, Child / 456789	PASSS	07/01/2022 - 06/30/2023	
	view payments	Male Age 14, DOB 07/17/2009				
<input type="checkbox"/>	edit assignment	Test, Child 2 / 12345678	Test, Child 2 / 12345678	Adoption Assistance	11/20/2021 - 10/31/2036	
	view payments	Male Age 4, DOB 10/24/2018				

For KGAP

- **Subsidy Type:** Column displays the most recent KGAP record and a hyperlink to the KGAP record.
- **Subsidy Eff-End Date:** Column displays the begin and end date of the child's subsidy.
- **Next Review:** Column displays the date of the next subsidy review.

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Sacwis, Susie
[1 KGAP Assignments ^](#)

Subsidy Type: Sort Susie's workload by:

Result(s) 1 to 1 of 1 / Page 1 of 1

Results per page:

		Child Name / ID Gender Age DOB	Case Name / ID	Subsidy Type	Subsidy Eff - End Date	Next Review
<input type="checkbox"/>	edit assignment	Test, Child / 12345678		C21KGAP	-	
	view payments	Age 17, DOB 10/05/2005				

Viewing a Person's Profile in FCM, Prevention Services, Adoption Subsidy and KGAP

- To view the **Person Overview** profile, click the **Child Name/ID Gender Age DOB** link.

		Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
<input type="checkbox"/>	edit assignment	Lane, Lois / 1234567	Test, Adult 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
	view payments	Female Age 8, DOB 1/1/2015					

The **Person Overview** screen displays.

▶ **Person Overview**

- [Profile](#)
- [Education](#)
- [Medical](#)
- [Employment](#)
- [Military](#)
- [Background](#)
- [Delinquency](#)
- [SACWIS History](#)
- [Relationships](#)

PERSON NAME / ID:
 Lane, Lois / 1234567
 Female Age 8, DOB 1/1/2015
 123 Clark Dr.
 Sunny, OH 12345-1234

RACE: *White*
 HISPANIC / LATINO: *No*
 HAIR COLOR:
 EYE COLOR:

ENVIRONMENTAL HAZARDS:

AKA Names

Prefix	First Name	Middle Name	Last Name	Suffix	AKA Type

Safety Hazards

Hazard Type	Begin Date	Narrative

Other Addresses

Type	Address	Hazard

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2. Click **Close** at the bottom on the screen to return to the **Assignment Screen**.

ICWA			
Date Family Was Asked	Possible Tribal Affiliation	Tribe Name	Response/Outcome
Close			

3. To view the child's **Case Overview** screen and assigned workers, click the **Case Name / ID** link.

	Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
<input type="checkbox"/>	edit assignment view payments Lane, Lois / 1234567 Female Age 8, DOB 1/1/2015	Test, Adult 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	

The **Case Overview** screen appears.

Case Overview

- Activity Log
- Intake List
- Forms/Notices
- Substance Abuse Screening
- Oncoino Case All
- Specialized All Tool
- Law Enforcement
- Justification/Waiver
- Case Services
- Legal Actions
- Legal Custody/Status
- Living Arrangement /

CASE NAME / ID: **Adoption**
Lane, Lois / 1234567 Open (12/09/2021)

ADDRESS: 123 Clark Dr.
Sunny, OH 12345

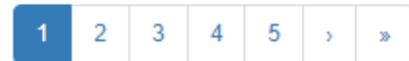
CONTACT:

AGENCY: Test County Department of Job and Family Services

PRIMARY WORKER: Assign Primary Worker SUPERVISOR(S): Test, Caseworker

Case Actions

4. Click **Close** at the bottom of the screen to return to the **Assignment Screen**.



[Dismiss Action Items](#)

[Close](#)

Managing the Financial Workload for Supervisors

Viewing a Person's Payment History

1. To view **Payments**, click the **View Payments** link.

<input type="checkbox"/>		Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
<input type="checkbox"/>	edit assignment	Lane, Lois / 1234567	Test, Adult 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
	view payments	Female Age 8, DOB 1/1/2015					

The **Payment History Search Results** screen displays.

Payment History Search Results

Note: The Action checkboxes are only used for the actions Delete Payments and Add to Roster.

Result(s) 1 to 40 of 40 / Page 1 of 1 Results per page:

	Payee / Provider ID	Person Name / ID	Payment Request ID	Adjust Pay ID	Service	Cost	Units	Net Reim Units	Claim Dates	Total	Action
view	Test Home Foster Care / 123456	Lane, Lois / 1234567	1234567		Test Foster Care (123-45)	\$85.00	30		06/01/2023 - 06/30/2023	\$2,550.00	<input type="checkbox"/>

Roster Name: [Test 123](#) Disbursement Name: Disbursed Date:

2. Select the **View** button on the appropriate case.

The **Payment Request Information** screen displays. Here you can view all **Payment Information, Service Authorization, Provider Information, Payment Amounts, Dates, etc.**

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Payment Request Information

Request Date: 07/05/2023 Created By: Test, Test Agency: Test County Department of Job and Family Services

Payment Information

Payment Request ID: 12345 Payment Start Date: 06/01/2023 Payment End Date: 06/30/2023 Purchase Order:

Case Person Information

Person Name / ID	Case Name/ ID	Case Worker	Case Service Member Status ID	Service Dates
Lane, Lois / 1234567	Test, Adult / 12345	Test, Caseworker		

Service Authorization / Contract Details

Provider Name	Service Auth ID / Contract Type	Contract ID / Number	Cost Description	Cost ID	Begin Date	End Date
view Test, Provider	123456 / Contract		Test - Cost Description	1234	04/01/2023	

Provider Information

Invoice Number: Invoice Date: Vendor Number:

Payee / Provider ID	Network Provider / ID	Service Provider / ID

[Close](#)

3. When complete, Click **Close**. You will be returned to the **Payment History Search** Screen.

Important: Eligibility Specialists assigned to a child’s case versus Eligibility Specialists assigned via the Financial Workload are two separate functions. Assignment to the case allows edit and view capabilities to various components of the child’s case. Assignment to a child’s case also makes the record also appear on the worker’s Case Workload. Assignments made in the Financial Workload create assignments to a child’s FCM, prevention services, adoption subsidy and KGAP records with only view capabilities to a child’s case. Also, the assignments in the Financial Workload does not appear on the worker’s Case Workload.

Assigning, Unassigning and Transferring Assignments

The **Assignments** screen for **FCM, Prevention Services, Adoption Subsidy** and **KGAP** enables supervisors to **Assign, Unassign, and Transfer** assignments between workers. To do so, complete these steps:

1. **Navigate** to the **Financial Workload** using the steps previously discussed.
2. Select **FCM, Prevention Services, Adoption Subsidy** or **KGAP** in the **Navigation** menu. The **Assignments By Worker** screen displays.
3. **Select** the appropriate workers name from the list.

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The **Grid** populates with the selected worker’s assignments and the worker’s name.

4. In the column on the left, **Check Mark** the grid rows that you want to change.
5. To **Select** all grid rows, click the **Top check mark box**.

<input type="checkbox"/>		Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
<input type="checkbox"/>	edit assignment	Lane, Lois / 1234567	Lane, Lois / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
	view payments	Female Age 8, DOB 1/1/2015					
<input type="checkbox"/>	edit assignment	Test, Child / 1234567	Test, Child / 1234567	Initial / Yes	Yes / 02/01/2023 -	02/07/2020	
	view payments	Male Age 6, DOB 11/05/2016					

6. Click the **Unassign**, **Transfer**, or **Assign** button.

Managing the Financial Workload for Supervisors

<input checked="" type="checkbox"/>	edit assignment	Lane, Lois / 12345678	Test, Adult / 45678910	Initial / Yes	No / 06/28/2023 -	12/23/2020	
	view payments	Female Age 16, DOB 01/04/2007					

Actions for Brandi's Workload:

[Assign](#) [Transfer](#) [Unassign](#)

Assigning a Work Item

The **Assign Action** functionality in Ohio SACWIS allows a supervisor to **Assign** a work item for a specific worker.

1. Select the **Assignment** you want to **Assign** by checking the check box next to the appropriate case.
2. Click the **Assign** button.

<input checked="" type="checkbox"/>	edit assignment	Lane, Lois / 12345678	Test, Adult / 45678910	Initial / Yes	No / 06/28/2023 -	12/23/2020	
	view payments	Female Age 16, DOB 01/04/2007					

Actions for Brandi's Workload:

[Assign](#) [Transfer](#) [Unassign](#)

The **Assign Work Item** screen displays.

3. Select the **Worker Name / ID** you want to **Assign** the Assignment to by **checking the check box** for the appropriate worker.
4. Click the **Assign** button.

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Assign Work Item

1 Work Items to be Assigned

Result(s) 1 to 1 of 1 / Page 1 of 1

Child Name / ID	Workers Currently Assigned / Roles
Lane, Lois / 1234567	Sacwis, Susie / Eligibility Specialist

Employees Receiving the Assignment

Show Employees by Supervisor:

Sacwis, Susie

Show Employees

	Worker Name / ID	Role
<input checked="" type="checkbox"/>	Test, Caseworker / 1234	Eligibility Specialist
<input type="checkbox"/>	Test, Caseworker / 1235	Eligibility Specialist
<input type="checkbox"/>	Test, Caseworker / 12345	Eligibility Specialist

Assign

Cancel

The **Employee Assignment** screen displays.

5. In the **Start Date** field, select the appropriate date.
6. Add **Comments** in the Comments box.
7. **Select** the **Save** button.

Employee Assignment

Start Date *

Comments:

Result(s) 1 to 1 of 1 / Page 1 of 1

Work Item Reference / ID
Lane, Lois / 1234567

Employees

Worker Name / ID	Role
Test, Caseworker	Eligibility Specialist

Save Cancel

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A message then displays stating the data has been saved.



Unassigning a Work Item

The **Unassign Action** functionality in Ohio SACWIS allows a supervisor to **Unassign** a work item from a specific worker.

8. Select the **Assignment** you want to **Unassign** by checking the check box.
9. Click the **Unassign** button.

Note: The selected **Assignment(s)** are then removed from that worker's workload.

<input checked="" type="checkbox"/>	edit assignment	Lane, Lois / 12345678	Test, Adult / 45678910	Initial / Yes	No / 06/28/2023 -	12/23/2020	
	view payments	Female Age 16, DOB 01/04/2007					



A message then displays stating the data has been saved.



Important: Because the work item is instantly removed from the worker's workload, it is strongly recommended that the supervisor write down the child's name or **Person ID** number for search reference.

If no other worker is assigned to the work item, the record is removed from the workload and placed in the **Unassigned** queue (accessed via the **Unassigned** link in the **Navigation** menu).

If other worker(s) are assigned, the work item is placed in the **Unassigned** queue, but will remain in the workload of the other worker(s).

To search for the unassigned work item or to find out who else it is assigned to, click the **Assignments by Person** link in the **Navigation** menu and enter the child's Person ID or complete a Person Search.

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Transferring a Work Item

The **Transfer Action** functionality in Ohio SACWIS ends the assignment of a specific worker and allows that work item to be transferred (assigned) to other workers.

If more than one worker is assigned when the work item is transferred to another worker(s), the transfer functionality ends the assignment of the worker the item is being transferred from while maintaining the assignment of the other workers.

1. Select the **Assignment** you wish to **Transfer**.
2. Click the **Transfer** button.

<input checked="" type="checkbox"/>	edit assignment	Lane, Lois / 12345678	Test, Adult / 45678910	Initial / Yes	No / 06/28/2023 - 12/23/2020	
	view payments	Female Age 16, DOB 01/04/2007				

Actions for Brandi's Workload:

Assign

Transfer

Unassign

The **Transfer Work Item** screen displays.

3. Select the **Worker Name / ID** you want to **Transfer** the Assignment to by **checking the check box** for the appropriate worker.
4. Click the **Transfer** button.

Transfer Work Item

1 Work Items to be Transferred

Note: Previously assigned workers will be removed from the work item and replaced with employees selected below:

Result(s) 1 to 1 of 1 / Page 1 of 1

Child Name / ID	Workers Currently Assigned / Roles
Lane, Lois / 1234567	Sacwis, Susie / Eligibility Specialist

Employees Receiving the Transfer

Show Employees by Supervisor:

Sacwis, Susie

Show Employees

<input type="checkbox"/>	Worker Name / ID	Role
<input type="checkbox"/>	Test, Caseworker	Eligibility Specialist
<input type="checkbox"/>	Test, Caseworker 2	Eligibility Specialist
<input type="checkbox"/>	Test, Caseworker 3	Eligibility Specialist

Transfer

Cancel

Managing the Financial Workload for Supervisors

The **Employee Assignment** screen appears.

5. In the **Start Date** field, select the appropriate date.
6. Add **Comments** in the Comments box.
7. **Select** the **Save** button.

Employee Assignment

Start Date *

Comments:

Result(s) 1 to 1 of 1 / Page 1 of 1

Work Item Reference / ID

Lane, Lois / 1234567

Employees

Worker Name / ID	Role
Test, Caseworker	Eligibility Specialist

Save Cancel

A message appears stating your data has been **Saved**.

Using the Assignments by Person Tab

To search for a child and see which workers he or she is assigned to, complete the following steps:

1. **Navigate** to the **Financial Workload** screen.
2. **Select** the **Assignments by Person** link (FCM, Prevention Services, Adoption Subsidy or KGAP section) in the **Navigation** menu. The **Assignments By Person** screen displays.
3. In the **Person ID** field, enter the appropriate **Person ID Number** or use the **Person Search** button to locate the child.
4. **Select** the **Go** button.

Managing the Financial Workload for Supervisors

Home Intake Case Provider **Financial** Administration

Workload Action Items Services Eligibility Payment Benefits Statistical & Expenditure Reports Invoicing

< >

FCM Prevention Services Adoption Subsidy KGAP

FCM Assignments by Worker FCM Assignments by Person FCM Unassigned (36 cases)

Assignments by Person

Note: Enter Person ID directly, or use Person Search to look up Person ID

Person Search ~ OR ~ Person ID: 1234567 Go

The **Assignments By Person** screen displays.

- To see a **History** of IV-E workers who have been assigned to the child, click the **View Assignment History** link.

Assignments by Person

Note: Enter Person ID directly, or use Person Search to look up Person ID

Person Search ~ OR ~ Person ID: 1234567 Go

Assignments

CHILD NAME / ID: Lane, Lois / 1234567 AGE / DOB: Age 8, DOB 1/1/2015 ELIG TYPE / INDICATOR: Initial / Yes

REIMB INDICATOR / EFF - END DATE: Yes / 02/01/2023 View Payments View Assignment History

Result(s) 1 to 1 of 1 / Page 1 of 1

	Employee Name / ID	Assignment Start Date
<input type="checkbox"/> edit assignment	Test, Caseworker	04/28/2020

The **Assignment History** Screen displays.

Assignment History

WORK ITEM ID: 12345 WORK ITEM TYPE: FCM Person WORK ITEM REFERENCE: Lane, Lois

Employee Assignment History

Test, Caseworker Start Date - End Date: 04/28/2020 - N/A Comments:

- Click **Close** to exit and return to **Assignments by Person** screen.

Managing the Financial Workload for Supervisors

To **Unassign** or **Assign** a worker, you may do this from the **Assignments by Person** Screen.

7. In the **Assignment** section, click the appropriate check box(es).
8. Click the **Assign** or **Unassign** button.

Assignments

CHILD NAME / ID: [Lane, Lois / 1234567](#) AGE / DOB: Age 8, DOB 1/1/2015 ELIG TYPE / INDICATOR: [Initial / Yes](#)

REIMB INDICATOR / EFF - END DATE: Yes / 02/01/2023 [View Payments](#) [View Assignment History](#)

Result(s) 1 to 1 of 1 / Page 1 of 1

<input type="checkbox"/>	Employee Name / ID	Assignment Start Date
<input type="checkbox"/> edit assignment	Sacwis, Susie / 12345	04/28/2020

Assign **Unassign**

9. Refer to the previous steps in this Knowledge Base Article about what screen appears when you click the **Assign** or **Unassign** buttons.

Using the Unassigned Link

To see which children are **Unassigned** and then **Assign** them to a worker(s), complete the following steps:

1. **Navigate** to the **Financial Workload** screen.
2. Click the **Unassigned** link (FCM, Prevention Services, Adoption Subsidy or KGAP section) in the **Navigation** menu. The **Unassigned Children** screen appears.

Managing the Financial Workload for Supervisors

FCM Assignments by Worker FCM Assignments by Person **FCM Unassigned (36 cases)**

Unassigned Children

Sort by:

Child Full Name (A-Z) ▾

Sort

[Jump to Name by Letter](#) ▾

Result(s) 1 to 25 of 36 / Page 1 of 2

Results per page:

25

Go

<input type="checkbox"/>	Child Name / ID Gender Age DOB	Case Name / ID	Elig Type / Indicator	Reimb Indicator / Eff - End Date	Custody Start Date	Next Review
<input type="checkbox"/>	Child, Test / 1234567 Female Age 10, DOB 08/09/2012	Adult, Test / 12345	Ongoing / Yes	Yes / 06/23/2023 -	12/03/2018	06/23/2024
<input type="checkbox"/>	Test, Child 2 / 12345678 Male Age 8, DOB 04/22/2015	Adult, Test 2 / 123456	Ongoing / Yes	Yes / 01/01/2023 -	12/03/2018	01/01/2024

The **Grid** populates with the **Unassigned** children.

Note: The IV-E supervisor can Assign any Unassigned work item(s) to their IV-E workers or to the IV-E workers of another IV-E supervisor.

To **Assign** a child to a worker follow the next steps.

3. **Select** the child you wish to **Assign** by **Checking** the checkbox.
4. Click the **Assign** button.

<input checked="" type="checkbox"/>	Test, Child / 1234567 Male Age 14, DOB 07/27/2009	Test, Adult / 12345	Initial / Yes	Yes / 03/01/2023 -	11/16/2021	03/01/2024
<input checked="" type="checkbox"/>	Test, Child 2 / 123456 Male Age 12, DOB 10/06/2010	Test, Adult 2 / 1234569	Initial / Yes	Yes / 03/01/2023 -	11/16/2021	03/01/2024

1 2 > »

Assign

The **Assign Work Item** screen displays.

5. Select the **Worker Name / ID** you want to **Assign** by **checking the check box** for the appropriate worker.
6. Click the **Assign** button.

Managing the Financial Workload for Supervisors

Assign Work Item

1 Work Items to be Assigned

Result(s) 1 to 1 of 1 / Page 1 of 1

Child Name / ID	Workers Currently Assigned / Roles
Lane, Lois / 1234567	Sacwis, Susie / Eligibility Specialist

Employees Receiving the Assignment

Show Employees by Supervisor:

Sacwis, Susie

Show Employees

	Worker Name / ID	Role
<input checked="" type="checkbox"/>	Test, Caseworker / 1234	Eligibility Specialist
<input type="checkbox"/>	Test, Caseworker / 1235	Eligibility Specialist
<input type="checkbox"/>	Test, Caseworker / 12345	Eligibility Specialist

Assign

Cancel

The **Employee Assignment** screen displays.

1. In the **Start Date** field, select the appropriate date.
2. Add **Comments** in the Comments box.
3. **Select** the **Save** button.

Managing the Financial Workload for Supervisors

Employee Assignment

Start Date * 

Comments:  

Result(s) 1 to 1 of 1 / Page 1 of 1

Work Item Reference / ID
Lane, Lois / 1234567

Employees

Worker Name / ID	Role
Test, Caseworker	Eligibility Specialist

A message then displays stating the data has been saved.



If you need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@childrenandfamily.ohio.gov.