



Supervisor Workload List Screen – Job Aid

The *Workload List* screen is used by OBH Service Coordinators to view detailed information regarding the clients assigned to them. OBH Supervisors use this screen to view the detailed list of clients assigned to a Service Coordinator and to transfer individual clients between Service Coordinators.

To transfer a group of assignments between users, please refer to the Workload Transfer Job Aid.

Workload List screen – Viewing Assignments

Client	Provider	Send Date	Status
► Biawas, Bandar	Allegheny Children's Initiative	4/26/2010 4:17:28 PM	New
Biawas, Bandar	Allegheny Children's Initiative	4/26/2010 3:22:40 PM	New
Phillips, John	Allegheny Children's Initiative	6/30/2011 4:49:01 PM	New
Seashore, sally	Allegheny Children's Initiative	6/30/2011 5:01:07 PM	New
Solomon, Gus	Allegheny Children's Initiative	8/22/2011 12:48:44 PM	Assignment Transfer
cupcake, susie	Allegheny Children's Initiative	9/9/2011 2:59:06 PM	New

- Log in to the KIDS application
 - <https://kids.county.allegheny.pa.us/kids>
- Click on the **CANS** menu button.
- The splash screen of the DHS Assessment Tool application will be displayed in a new window.
- Navigate to the *Workload List* screen.
 - Admin > Workload**
- The workload of the logged in user is displayed.
- To view the Workload List of a different user, select another name from the *User* drop list.
 - TIP: The field of Provider defaults to the agency of the logged in user and is disabled.*
 - TIP: The field of Office defaults to the Program Office of the logged in user and is disabled.*
 - TIP: Only a Supervisor can view the Workload list of a different user.*
- Highlight a record and click the **[Show]** button to bring the *Assessment Episode* into focus.

Workload List screen – Transferring Assignments

Assignment Details					
Provider	Worker	Status	Send Date	End Date	Client
▶ Circle C	r	Assignment Transfer	8/19/2011		Bob Barker
	Meredith-ERO,Adam	New	8/19/2011	8/19/2011	Bob Barker

Provider Assignment

☐ Assign to Provider

Provider

Release Date

Release Signed By

Worker Assignment

☐ Assign to Worker

Provider

Worker

Summary

Dates

Start

End

Save

New

Cancel

1. Navigate to the *Workload List* screen.
 - a. **Admin > Workload**
2. The workload of the logged in user is displayed.
3. Click on the *User* drop list to select the name of the worker the child is currently assigned to.
4. Highlight the client that is to be transferred.
5. Click the **[Transfer]** button.
6. The *Assignment Details* window is displayed.
7. Click the **[New]** button to create a new assignment.
8. Click the *Assign to Worker* radio button.
9. The *Provider* field will display the name of the agency of the logged in user.
 - i. *TIP: This field is read-only and cannot be edited.*
10. Select the name of the worker that will be receiving the child assignment.
11. Click the **[Save]** button to complete the transfer.
 - i. *TIP: The previous assignment will automatically be End Dated.*

For more information...

If additional assistance is needed, please contact the Bureau of Information Systems Management HelpDesk at 412-350-HELP (412-350-4357), option 2, or by email at Helpdesk-dhs@alleghenycounty.us.