Workload Transfer – Job Aid

The *Assignment Transfer* and *Approval Transfer* screens are used by OBH Supervisors to move individual or a group of assignments between users along with moving individual or a group of approval requests between supervisors.

A supervisor can also transfer individual assignments by using the Workload List screen, also located under the Admin menu. Please refer to the OBH Supervisor Workload List screen Job Aid for additional information.

Assignment Transfer screen

1. Log in to the KIDS application
    a. https://kids.county.allegheny.pa.us/kids
2. Click on the **CANS** menu button.
3. The splash screen of the DHS Assessment Tool application will be displayed in a new window.
4. Navigate to the *Assignment Transfer* screen.
    a. **Admin > Workload Transfer > Assignments**
5. Select who the assignment(s) are being removed from. The *User Filter* field, located in the *Transfer From* area, is used to select the Service Coordinator that the assignment(s) are to be removed from.
    i. TIP: *The fields of Provider Filter and Office Filter are disabled.*
6. Select who the assignment(s) are to be transferred to. The *User* field, located in the *Transfer To* area, is used to select the Service Coordinator that the assignment(s) are to be transferred to.
    i. TIP: *The fields of Provider and Office are disabled.*
7. Click the **[Go]** button to display the name of the Service Coordinator selected in the *Transfer From* area.
8. Click the **[+]** sign to expand the workload list of the selected user.
9. Click the checkbox adjacent to the assignment to mark that assignment for transfer. Multiple assignments can be selected.
    i. TIP: *Clicking the checkbox adjacent to the users name will mark all of the assignments in the list*.
10. Click the **[Transfer]** button to complete the transfer of the assignment(s).

1. Navigate to the *Approval Transfer* screen.
   a. **Admin > Workload Transfer > Approvals**
2. Use the *Transfer From User* field to select the supervisor who the assignment(s) are being removed from.
3. The *Approval List* area will populate with the assessment that have supervisory approval requested.
4. Click the checkbox to mark the approval request(s) for transfer.
5. Use the *Transfer To User* field to select the supervisor who the assignment(s) are being sent to.
6. Click the **[Transfer]** button to complete the transfer of the approval request(s).

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.