



Transfer Workload – IL Job Aid

The *Transfer Workload* screen allows managers and supervisors to transfer individual Referrals and cases from worker to another as well as transferring whole workloads between workers.

Transfer Workload

▼ Search Workload

Role *

-Select- ▼

Supervisor

-Select- ▼

Transfer From *

-Select- ▼

Referral/Case ID

Show Workload

▼ Workload Details

Workload Type	Name	Referral/Case ID

▼ Transfer Workload

Role *

-Select- ▼

Supervisor

-Select- ▼

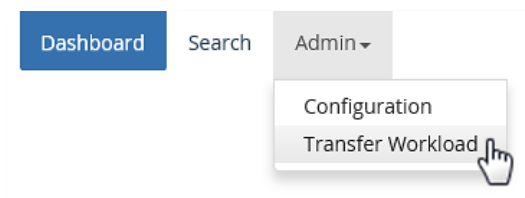
Transfer To

-Select- ▼

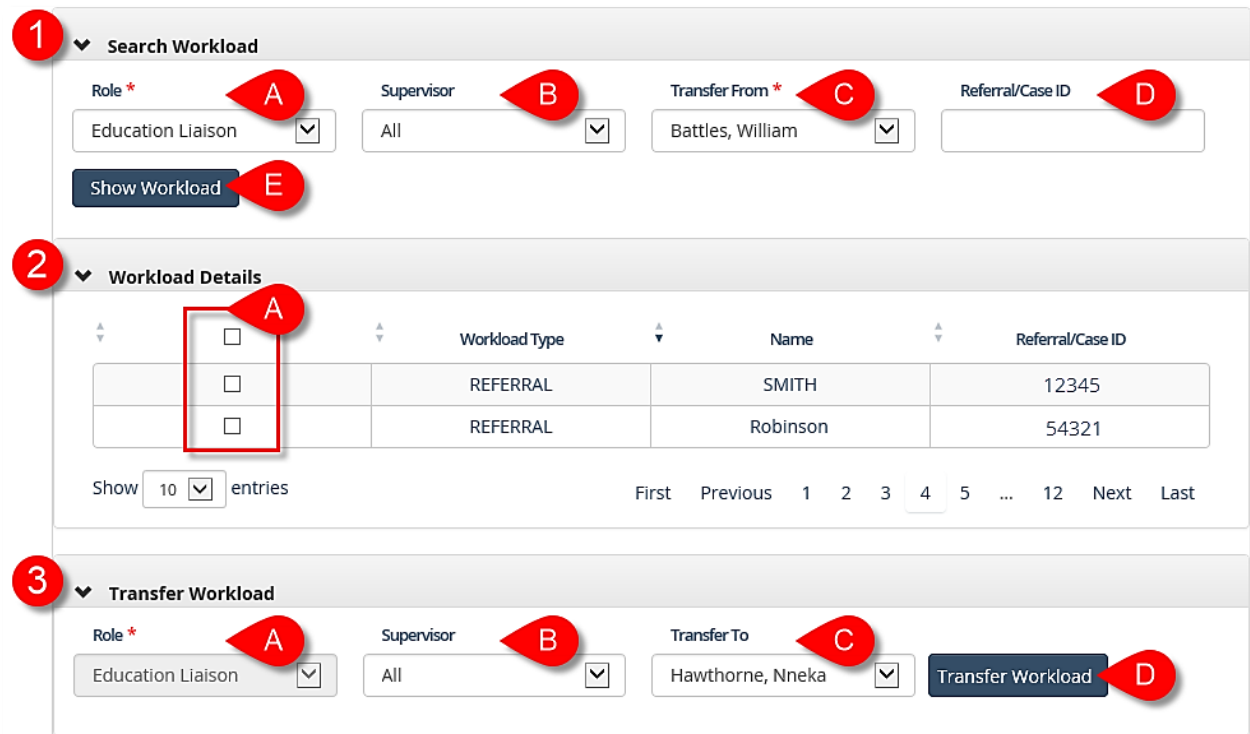
Transfer Workload

Navigation

- Using the static navigation tiles located at the top of every screen select **Admin > Transfer Workload**



Transferring Referral(s) between Workers



1 Search Workload

Role *

Supervisor

Transfer From *

Referral/Case ID

2 Workload Details

	Workload Type	Name	Referral/Case ID
<input type="checkbox"/>	REFERRAL	SMITH	12345
<input type="checkbox"/>	REFERRAL	Robinson	54321

Show entries

First Previous 1 2 3 4 5 ... 12 Next Last

3 Transfer Workload

Role *

Supervisor

Transfer To

1. **Search Workload**: Use this pane to search for the Referral or Workload to transfer.
 - a. *Role*: Select the Role of the worker from the drop-down.
 - b. *Supervisor*: Select a Supervisor from the drop-down. This supervisor's Workers will be displayed in the *Transfer From* drop-down for selection. Selecting "All" will display workers from all units.
 - c. *Transfer From*: Select the worker who is currently assigned to the Referral or Workload.
 - d. *Referral/Case ID*: Referral/Case ID is not required but can be used to filter the results down to a specific Referral or Case by typing the Referral or Case number in the field.
 - e. Click **Show Workload** to display the desired Referral/Workload in the **Workload Details** pane.
2. **Workload Details**: This pane displays the search results.
 - a. Select the Referrals/Cases to be transferred using the checkboxes to the left of each listed Referral or Case. To select all of the displayed items check the checkbox above the grid; this will select all of the items in the grid at once.



3. : Use this pane to search for the worker to transfer the Referral/Workload to.
 - a. *Role*: This defaults to the Role selected in the pane and cannot be changed. Referrals/Workloads can only be transferred between workers with the same role.
 - b. *Supervisor*: Select a Supervisor from the drop-down. This supervisor's workers will now be displayed in the *Transfer to* drop-down for selection.
 - c. *Transfer to*: Select the new Worker to transfer the Referrals/Cases/Workload to.
 - d. Click to complete the transfer.

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access I-Service, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>