

CSCD JIMS2

Tasks/Assignment/Reassignment

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Introduction

This training module explains the JIMS2 functionality: Tasks/Assignments/Reassignments.

This functionality allows authorized CSCD employees to manage case assignments by processing tasks and to manage case reassignments through requests made by CSOs, supervisors and support staff via the Caseload page.

Tasks are generated and sent to the appropriate user or workgroup in JIMS2 when:

- A new supervision order is activated.
 - A case reassignment is made via the Caseload screen.
 - A user completes a workflow that generates a task for another user.
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User and Workgroup Tasklists

Tasks submitted to a specific user will display on that user's Action List.

Tasks submitted to a workgroup will display for all users in that workgroup.

Workgroups have been set up by CSCD's Information Services Division. Each program unit has an intake workgroup.

View Tasklist

The Task Search page displays all the submitted and accepted tasks currently on your Action List.

This screen also allows authorized users to search for tasks that have been sent to Workgroups to which they are assigned.

To **view your current Tasklist in JIMS2** follow the steps below:

Step	Action
1	Select <u>View Tasklist</u> from the left navigation tree listed under CSCD > Tasks.
2	The current Action List for the logged in user will display.

Continued on next page

View Tasklist
(continued)

To **view the current Tasklist for a workgroup in JIMS2** follow the steps below:

Step	Action
1	Select <u>View Tasklist</u> from the left navigation tree listed under CSCD > Tasks.
2	Change the Tasklist Type to WORKGROUP by clicking on the drop-down menu provided.
3	Click on a displayed workgroup name. NOTE: Only Workgroups to which you are assigned will display. Contact CSCD Information Services to be assigned to a workgroup.
4	Click Submit . The current Action List for that workgroup will display.

Advanced Search and Supervisee Details

The following functionality is available from the Tasklist screen.

- Click **Advanced search** to search for tasks using additional search criteria, for example, to search for tasks by SPN.

Note: to search by more than one Status such as Accepted and Submitted, hold down the Ctrl key and click multiple status listings.

- Click a listed supervisee's name to transfer to the Supervisee Details screen for that supervisee.
-

Task Statuses

Tasks go through various statuses as users perform functions in JIMS2.

Task statuses include:

- **Submitted** — New tasks display on a tasklist in this status.
 - **Accepted** — Tasks display on a user's Action List in this status once the user selects the task and clicks **Accept**.
 - **Closed** — Tasks become closed once a user completes the workflow for an accepted task. Once a task is closed, it no longer displays on a user's action list. To view a closed task, click the **Advanced Search** link on the Task Search screen and inquire on the status **CLOSED**.
-

**Assignment/
Reassignment
process**

The case assignment/reassignment process in JIMS2 is initiated in two ways in JIMS2:

- Through system generated tasks when a new supervision order is created.
 - Through manually initiated tasks that are generated when an authorized user selects a case to be reassigned and completes the **Request Reassignment to CLO** or **Reassign** workflow from the Caseload screen.
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**Tasks for new
supervision
orders**

When a new supervision order is created, a task is generated and sent to Court Services Intake (CS Intake) to begin the case assignment process.

The following list shows the workgroups and/or people who will receive tasks in the new case assignment process:

1. Court Services Intake
2. Program Unit Intake
3. Supervisor
4. Officer

See CSCD Diagrams for a depiction of this process.

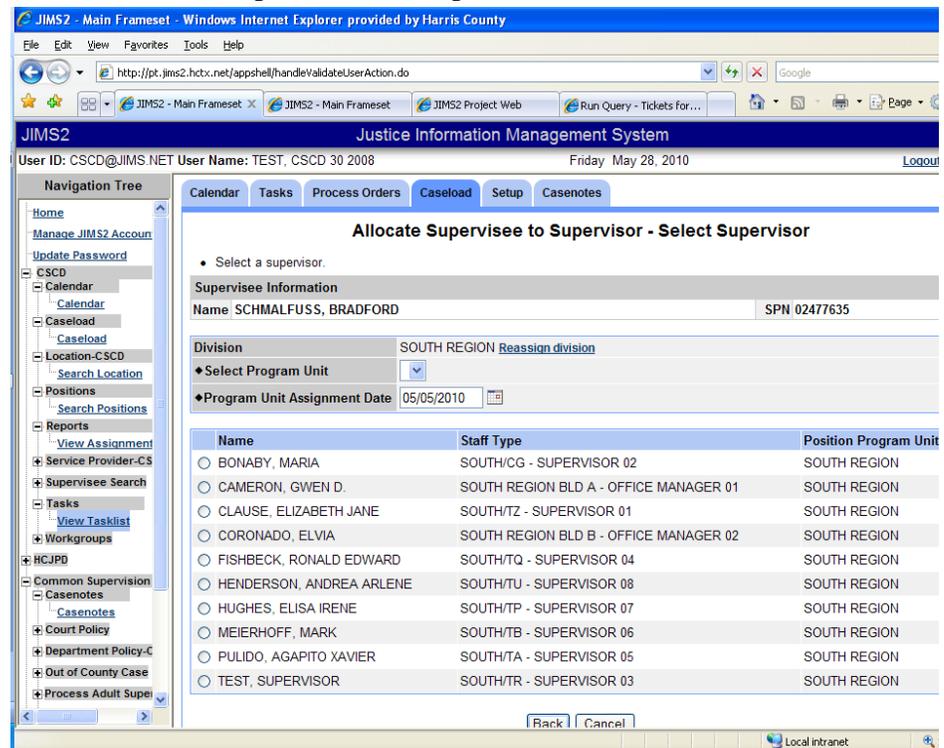
Close Task

Tasks are automatically closed once an authorized user accepts the task and completes the workflow.

If needed, tasks can be manually closed by someone in CSCD Information Services.

**Assignment
from Court to
CSO**

1. Supervision order is activated.
2. A task with the following subject is sent to CS Intake: “**New Order for Supervision.**”
3. **CS Intake** accesses **View Tasklist**, selects workgroup **CS Intake**, accepts the task, acknowledges receiving the paper file, assigns the supervisee to the appropriate program unit, and selects the appropriate program unit intake workgroup.
4. A task with the following subject is sent to the intake workgroup: “**New Order Allocate to Supervisor.**”
5. **Support staff** accesses **View Tasklist**, selects the program unit intake workgroup, accepts the task, acknowledges receiving the paper file, and allocates the supervisee to a supervisor.



6. A casenote is created during this workflow, and the user can add to it or change it, and then click **Next** and **Finish**.
7. A task with the following subject is sent to the supervisor: “**New Order Assign to Officer.**”

8. The **supervisor** accesses **View Tasklist**, accepts the task and assigns the supervisee to an officer.

The screenshot shows the JIMS2 interface in Internet Explorer. The user is logged in as TEST, SUPERVISOR. The main content area displays the 'Assign Supervisee to Officer - Caseload Summary' page. The page includes a navigation tree on the left with options like 'Home', 'Manage JIMS2 Accounts', 'Update Password', 'Calendar', 'Caseload', 'Service Provider-CSCD', 'Supervisee Search', 'Tasks', and 'View Tasklist'. The main content area has tabs for 'Calendar', 'Tasks', 'Process Orders', 'Caseload', and 'Casenotes'. The 'Caseload' tab is active, showing a summary for Supervisor TEST, SUPERVISOR. The summary includes a table with columns for POI, Position Name, CJAD, Officer Name, and various LOS (LOS0-LOS4) and Workload metrics. The table lists several positions and their associated caseload data.

POI	Position Name	CJAD	Officer Name	LOS0	LOS1	LOS2	LOS3	LOS4	IND	Work
5D	SOUTH/5D - CSO 61	JUY4I	THREE TRAIN	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Number of SPNs:				0	0	0	0	0	0	1
CQ	SOUTH/CQ - CSO 17	JUSPT	CSCD TEST	4.0	0.0	27.5	127.68	1.0	0.0	160.
Number of SPNs:				1	0	11	96	1	12	
P*	PERFORMANCE TESTING		null TEST CASELOAD	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Number of SPNs:				0	0	0	0	0	0	
TF	SOUTH/TF - CSO 63	JU8CP	TWO TRAIN	0.0	0.0	0.0	1.33	0.0	0.0	1.3
Number of SPNs:				0	0	0	1	0	0	
TR	SOUTH/TR - SUPERVISOR 03	JUKNY	SUPERVISOR TEST	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Number of SPNs:				0	0	0	0	0	0	

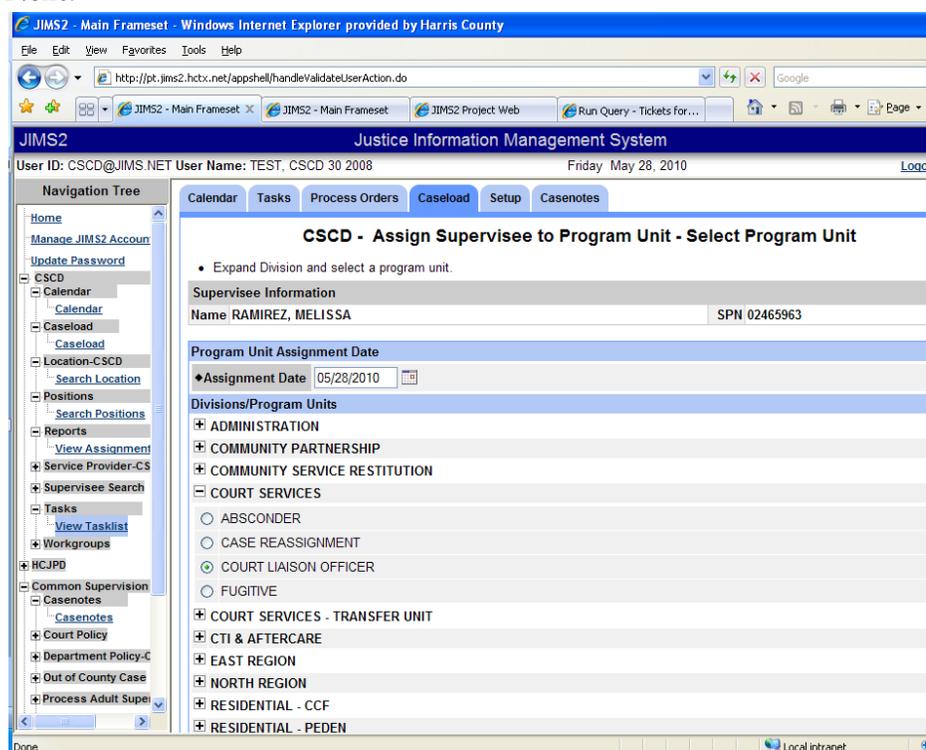
Green caseload records indicate that the officer is currently assigned the supervisee.

9. A task with the following subject is sent to the officer: “**New Order – Officer Acknowledgment.**”

10. The **officer** accesses **View Tasklist** and accepts the task.

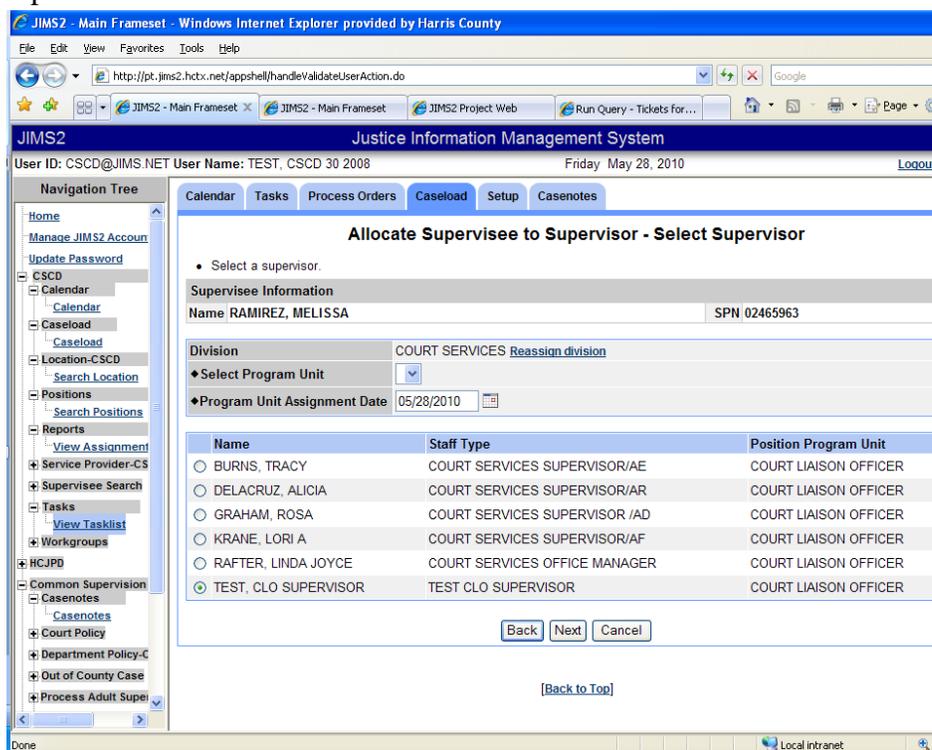
**Assignment
from Court
Back to CLO**

1. Order is activated.
2. A task with the following subject is sent to CS Intake: “**New Order for Supervision.**”
3. **CS Intake** accesses **View Tasklist**, selects workgroup **CS Intake**, accepts the task, and acknowledges receiving the paper file.
4. On the Assign Supervisee to Program Unit page, enter the Assignment Date, expand Court Services, select **Court Liaison Officer** and click **Next**.

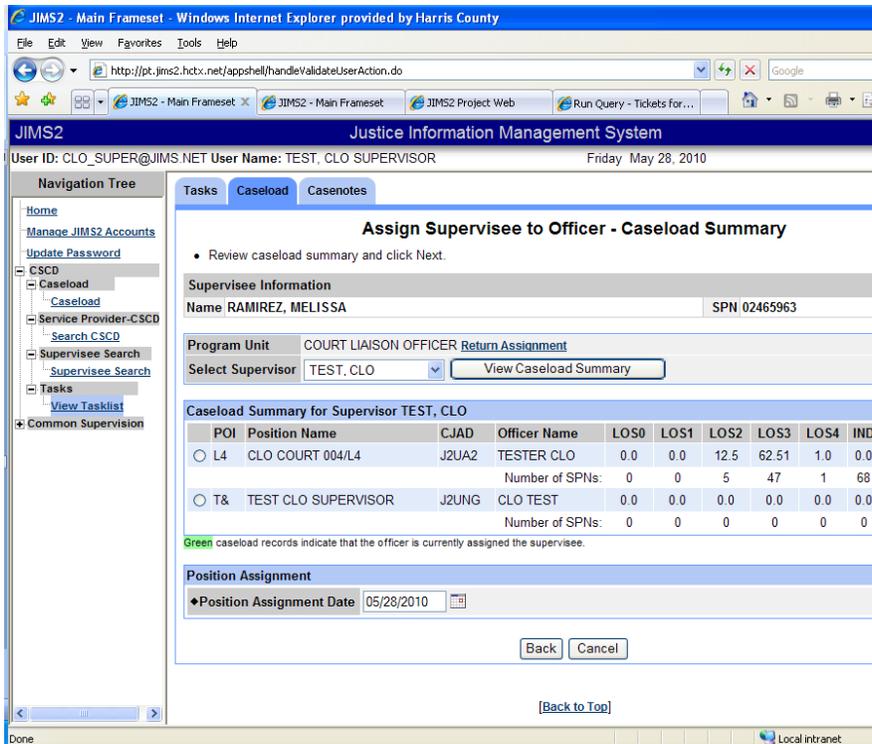


5. On the Select Workgroup page, select **CS Intake** and click **Next**.
6. Add to or change the auto-generated casenote if needed and click **Next** and **Finish**.
7. A task with the following subject is sent to the CS Intake workgroup: “**New Order Allocate to Supervisor.**”
8. **CS Intake** accesses **View Tasklist**, selects workgroup **CS Intake**, accepts the task, and acknowledges having the paper file.

- On the Allocate Supervisee to Supervisor page, select the CLO supervisor and click **Next**.



- Add to or change the auto-generated casenote if needed and click **Next** and **Finish**
- A task with the following subject is sent to the CLO supervisor: “**New Order Assign to Officer.**”
- The **CLO supervisor** accesses **View Tasklist**, accepts the task, and acknowledges receiving the paper file.
- On the Assign Supervisee to Officer page, either leave the current supervisor displaying or select a different supervisor and then click View Caseload Summary. Select the CLO, enter the assignment date and click **Next**.



14. Add to or change the auto-generated casenote if needed and click **Next** and **Finish**.

15. A task with the following subject is sent to the CLO: “**New Order – Officer Acknowledgement.**”

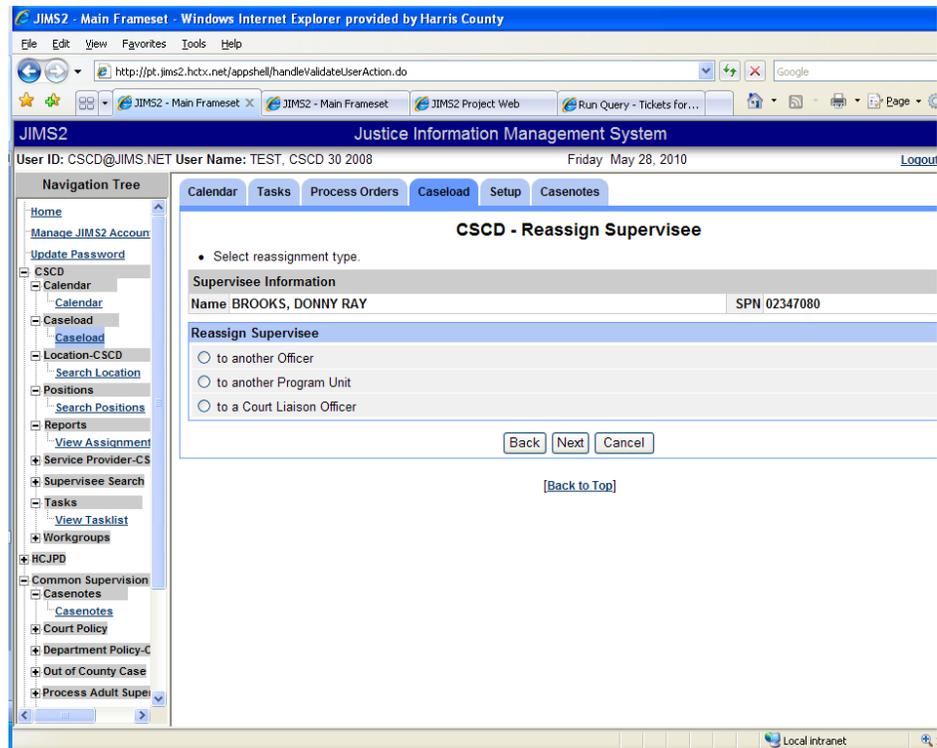
16. The officer accesses **View Tasklist** and accepts the task.

**Reassignment
from CSO to
CLO**

1. **CSO** accesses **Caseload**, clicks on the plus sign to **+** expand a listing, selects a case, and clicks the button labeled **Request Reassignment to CLO**.
 2. This workflow creates a task for the CSO's supervisor. If needed, change the "To" field to the supervisor's manager. Also add, change or delete the task text if needed. Click **Next**, then **Finish**.
 3. A task with the following subject is created for the CSO's supervisor: **"Reassignment to CLO."**
 4. **CSO** must access Casenotes, complete a SPN search, and create a casenote about this request.
 5. The **supervisor** accesses **View Tasklist**, accepts the task and approves or rejects the request. If the request is rejected, the case remains on the CSO's caseload.
 6. If the request is approved, the **supervisor** selects the program unit intake workgroup, and a task with the following subject is created for the program unit intake workgroup: **"Reassignment to CLO."**
 7. **Supervisor** must access Casenotes, complete a SPN search, and create a casenote about this reassignment.
 8. **Support staff** accesses **View Tasklist**, inquires on the program unit intake workgroup, accepts the task, acknowledges receiving the paper file, and reassigns the case to the CLO.
 9. A task with the following subject is created for Court Services Receiving: **"Reassign Case(s) to CLO."**
 10. **Court Services Receiving** accesses **View Tasklist**, inquires on workgroup Court Services Receiving, accepts the task and acknowledges receiving the paper file.
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Reassignment from one CSO to another CSO within the same division

1. **CSO** accesses **Casenotes**, completes a SPN search, and creates a casenote documenting the request to reassign the case to another CSO in the same division.
2. **CSO** takes the casefile to the supervisor.
3. **Supervisor** accesses **Casenotes**, completes a SPN search, and makes a casenote to document approval to reassign case to another CSO.
4. **Supervisor** takes casefile to support staff intake.
5. **Support staff** accesses **Caseload**, completes a SPN search, expands the supervisee's listing, selects a case or cases, clicks the **Reassign**, button, acknowledges receiving the paper file, selects "**to another officer**," and clicks **Next**.



6. On the Reassign Supervisee to Officer page, either leave the current supervisor displaying or select a different supervisor and then click View Caseload Summary. Select the appropriate officer, enter the assignment date and click **Next**.

CSCD - Reassign Supervisee to Officer - Caseload Summary

- Review caseload summary and click Next.

Supervisee Information

Name: BROOKS, DONNY RAY SPN: 02347080

Program Unit: SOUTH REGION

Select Supervisor: CLAUSE, ELIZABETH JANE View Caseload Summary

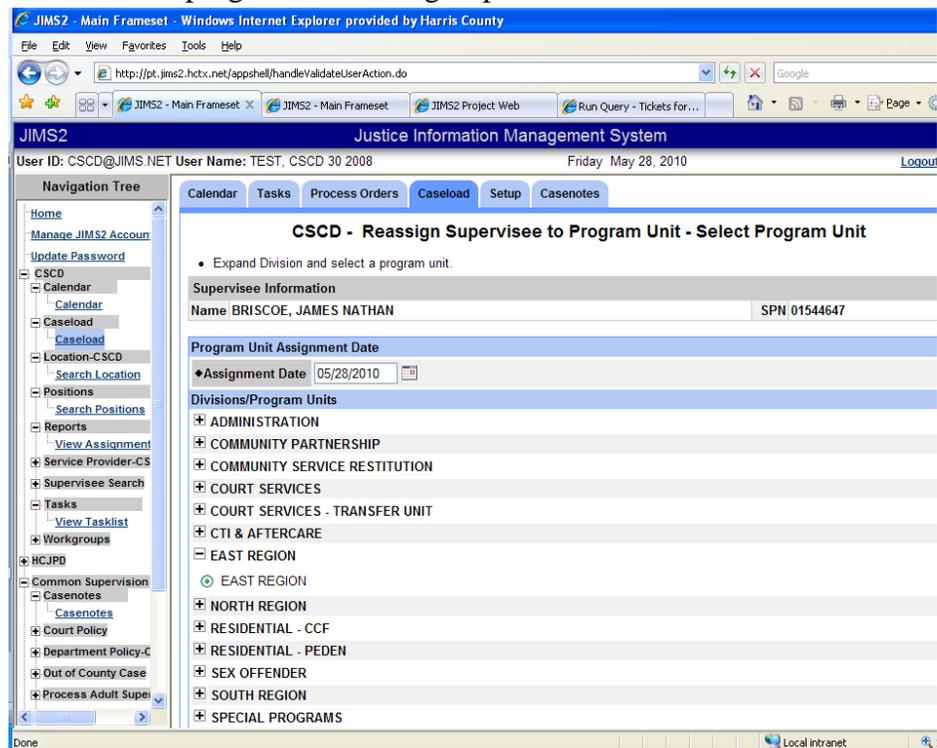
Caseload Summary for Supervisor CLAUSE, ELIZABETH JANE

POI	Position Name	CJAD	Officer Name	LOS0	LOS1	LOS2	LOS3	LOS4	IND	Work
5A	SOUTH/5A - CSO 01	ADI4444	ANABELLE DICKERSON	0.0	0.0	35.0	151.62	0.0	0.0	186
Number of SPNs:				0	0	14	114	0	7	
CD	SOUTH/CD - CSO 02	TBR6163	TANISHA BROWN	0.0	0.0	20.0	146.3	4.0	0.0	170
Number of SPNs:				0	0	8	110	4	6	
5K	SOUTH/5K - CSO 03	ODE2414	ORELIA DEVEREAUX	0.0	0.0	37.5	143.64	0.0	0.0	181
Number of SPNs:				0	0	15	108	0	13	
CA	SOUTH/CA - CSO 04	RLA2482	RORY LAUBSCHER	0.0	0.0	15.0	155.61	0.0	0.0	170
Number of SPNs:				0	0	6	117	0	18	
TZ	SOUTH/TZ - SUPERVISOR 01	ECL9757	ELIZABETH CLAUSE	0.0	0.0	0.0	0.0	0.0	0.0	0
Number of SPNs:				0	0	0	0	0	0	
5E	SOUTH/5E - CSO 05	MBO2639	MARY BOSQUEZ	0.0	0.0	15.0	134.33	2.0	0.0	151
Number of SPNs:				0	0	6	101	2	13	
CY	SOUTH/CY - CSO 06	IMA1380	II FANA MARSHAI	0.0	0.0	2.5	112.31	0.0	0.0	144

- Add to or change the auto-generated casenote if needed and click **Next** and **Finish**.
- This creates a task with the following subject: “**Reassignment to Officer.**”
- CSO** accesses **View Tasklist**, accepts task, and acknowledges receiving paper casefile.

**Reassignment
from one
Program Unit
to another
Program Unit**

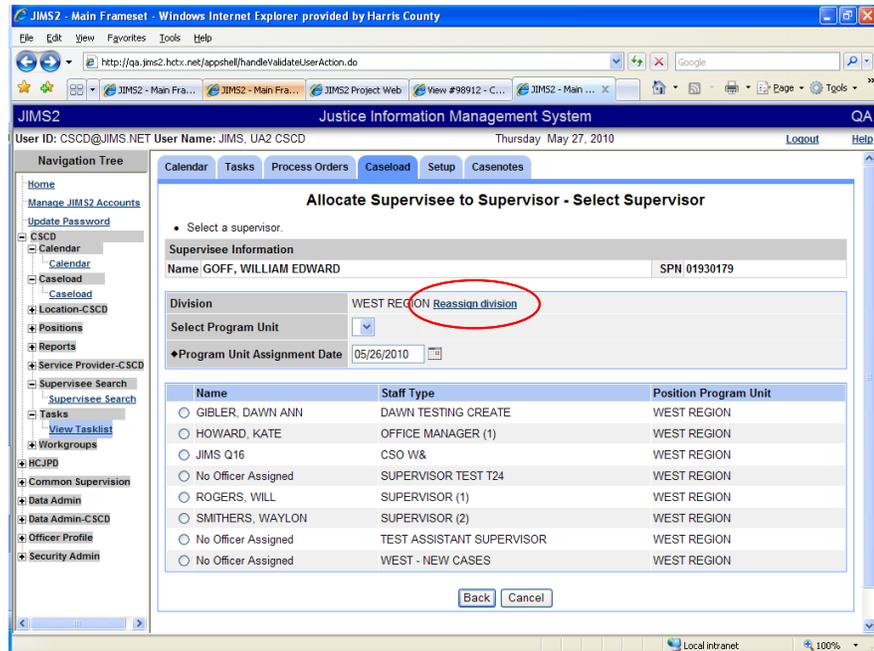
1. **CSO** accesses **Casenotes**, completes a SPN search, and creates a casenote documenting the request to reassign the case to another program unit.
2. **CSO** takes the casefile to the supervisor.
3. **Supervisor** accesses **Casenotes**, completes a SPN search, and creates a casenote to document approval to reassign the case to another program unit.
4. **Supervisor** takes the casefile to support staff intake.
5. **Support staff** accesses **Caseload**, completes a SPN search, expands the supervisee’s listing, selects a case or cases, clicks **Reassign**, acknowledges receiving the paper file, selects “**to another program unit,**” and clicks **Next**.
6. On the Reassign Supervisee to Program Unit page, enter the assignment date, expand Division, select Program Unit, click **Next**, and select the program unit workgroup.



7. Add to or change the auto-generated casenote if needed and click **Next** and **Finish**.
 8. This generates a task with the subject “**Reassignment to Program Unit**.”
 9. **Support staff** in the program unit will process the task as explained in the Assignment section.
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**Reassign
Division Link**

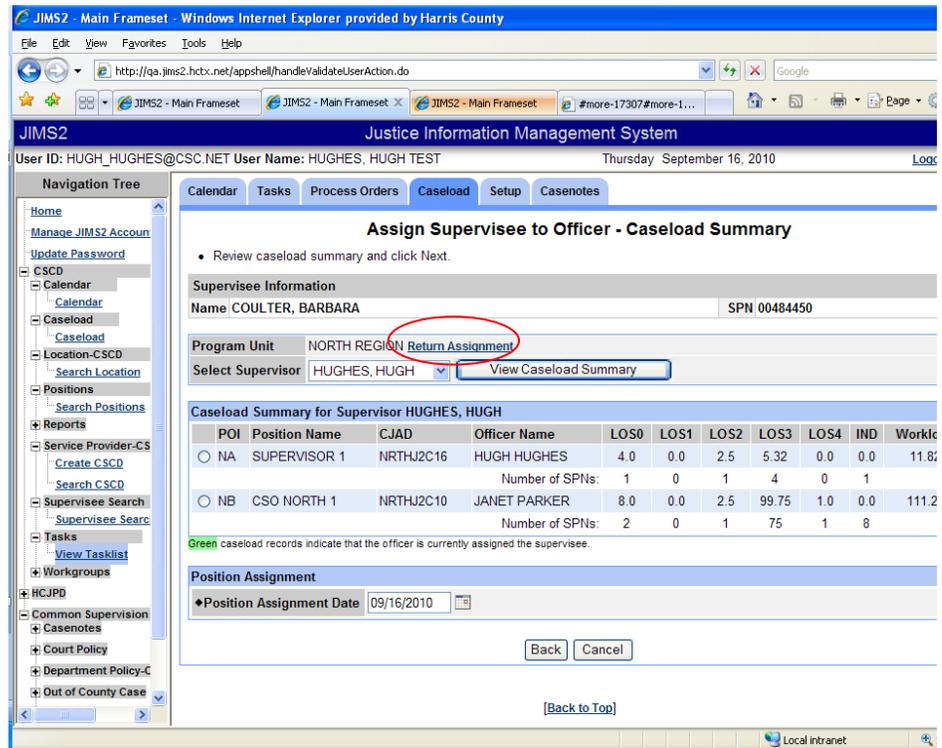
1. **Support staff** accesses **View Tasklist**, inquires on the program unit intake workgroup, finds a task with the subject “**New Order Allocate to Supervisor**” or “**Reassignment to Program Unit,**” accepts the task and acknowledges receiving the paper file.
2. From the Allocate Supervisee to Supervisor page, click the link labeled **Reassign division**.



3. Enter the assignment date, expand the Division and select the program unit.
4. Click **Next** then select the intake workgroup.
5. Click **Next**. Add to or change the auto-generated casenote if needed and click **Next** and **Finish**.

**Return
Assignment
Link**

1. **Supervisor** accesses **View Tasklist**, views Action List, finds a task with the subject “**New Order Assign to Officer**” or “**Reassignment to Program Unit,**” accepts the task and acknowledges receiving the paper file.
2. From the Assign Supervisee to Officer page, click the link labeled **Return Assignment**.



3. Select the workgroup name (example, the workgroup for the program unit intake section). Enter a Return Reason and click **Next**.
4. Click **Finish**.