



Assignment of Applications

Revision History

Revision / Version #	Date of Release	Author	Summary of Changes
1.0		Ericka Durant	Initial Draft
2.0	01/03/2022	Ericka Durant	Document reformatting, ADA Compliance updates, and incorporated training feedback.
3.0	01/19/2022	Melissa Smith	Finalized for PDF
3.1	01/26/2022	Melissa Smith	Removed tables in footers
4.0	02/03/2022	Lori Savageau	ADA Review and Revision
5.0	02/25/2022	Ericka Durant	Application invitation steps added
6.0	03/01/2022	Lori Savageau	Final ADA Review
7.0	05/11/2022	Melissa Smith	Updated thru T1.06 Enhancements Removed sending applicant invitation – moved to new QG 12 - Applicant Portal Information for Worker
8.0	6/2/2022	Lori Savageau	Final ADA Review

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Module 3: Assignment of Applications

Purpose

The purpose of this module is to provide instruction on how to manage the receipt of applications as well as record, submit, and assign applications in the CWS-CARES RFA system.

Objectives

After completing this module, you will be able to:

- Manage Applications
- View and assign applications
- Transfer Application Owners

Prerequisites

Prior to taking this module, you should have completed the following:

- Module Prerequisite 1: Welcome to Virtual Training PowerPoint
- Module Prerequisite 2: Functionality PowerPoint
- Module 1: Worker Entered Caregiver Application
- Module 2: Tribal Child RFA

Related Quick Guides

- Quick Guide 3: Assignment of Applications

Introduction

CARES RFA Allows users, Social Workers, Supervisors, and Managers, to receive, assign, and re-assign RFA Applications. Once assigned, users will also be allowed to schedule in-home assessments, and continue with the RFA Application. All users assign applications in the same manner. After this lesson, users will understand the application assignment process as well as the notification that a new application was assigned to a user.

With CARES, staff can:

- Receive all applications created by their assigned staff and themselves
- Edit and Update RFA applications
- Assign and transfer applications to other staff or other counties
- Submit RFA Applications for approval
- Request certification once application is approved

Lesson: Assigning an Application

Demonstration Exercise

Please watch the instructor demonstrate the steps of this exercise.

Scenario

A social worker just completed entering an application in CARES RFA. The applicant resides in the same county as the social worker, so once the application is complete, the social worker can now assign this application to themselves, then send the applicant an invitation to the applicant portal.

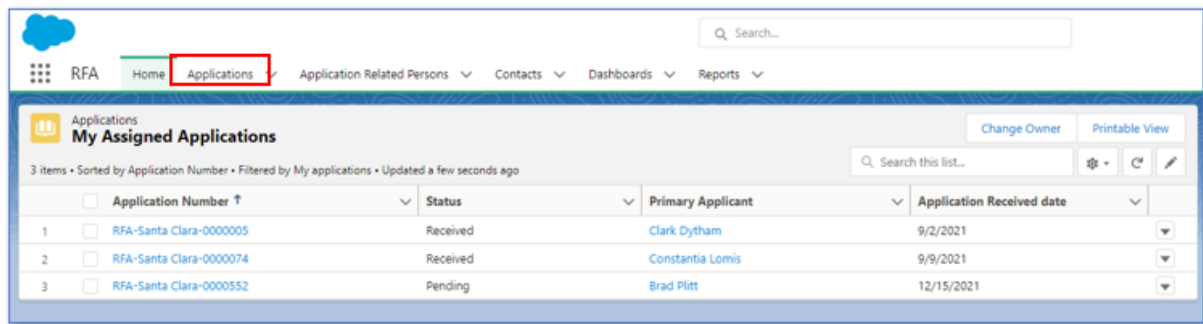
Actions to complete this exercise:

- Locate the application in your county's unassigned queue
- Assign the application to yourself

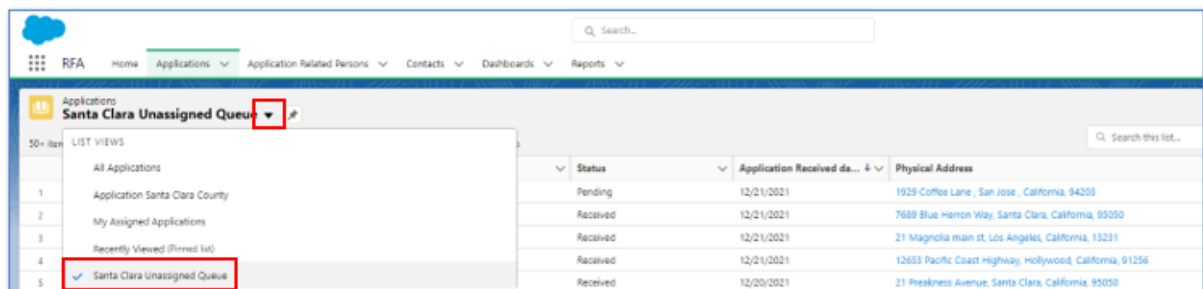
NOTE: As the queue grows, you may need to sort the list by name or date to locate the RFA Application.

Starting on the Home page:

1. On the **Navigation Bar**, click the **Applications** tab.

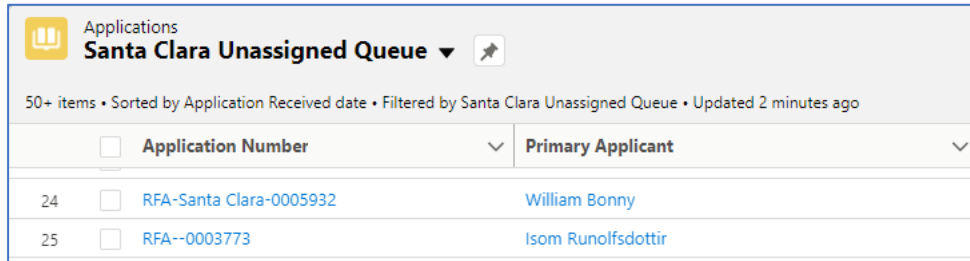


2. Next to **Recently Viewed**, click the down arrow and from the dropdown list, select **<Your County> Unassigned Queue**.



The Unassigned Queue displays.

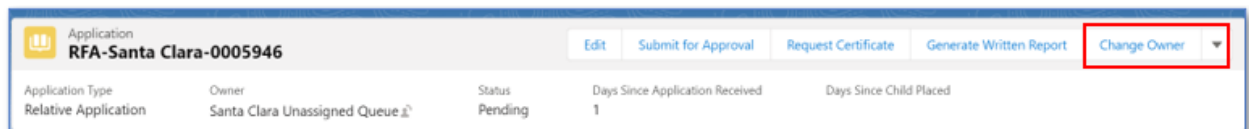
- In the **Application Number** column, click the application link for your application (see your data sheet for your application number and primary applicant's name).



	Application Number	Primary Applicant
24	RFA-Santa Clara-0005932	William Bonny
25	RFA--0003773	Isom Runolfsdottir

The **Application** page displays.

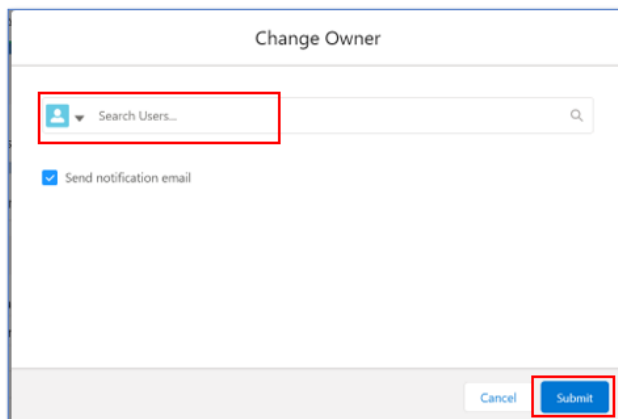
- In the upper right-hand corner, click the **Change Owner** button.



Application Type	Owner	Status	Days Since Application Received	Days Since Child Placed
Relative Application	Santa Clara Unassigned Queue	Pending	1	

A **Change Owner** window displays.

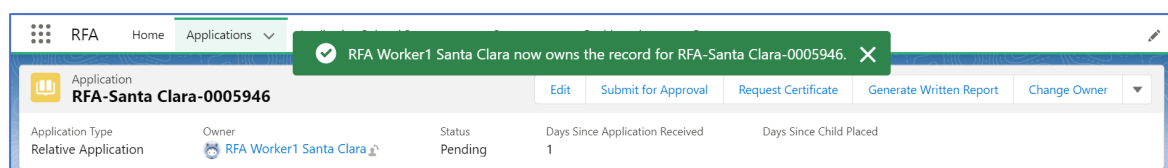
- Click the **Search User** field and dropdown list displays names. If your name does not display, begin typing in your name and the list will update with possible matches. Once your name displays in the dropdown list, select it.
- Click **Submit**.



Change Owner

Send notification email

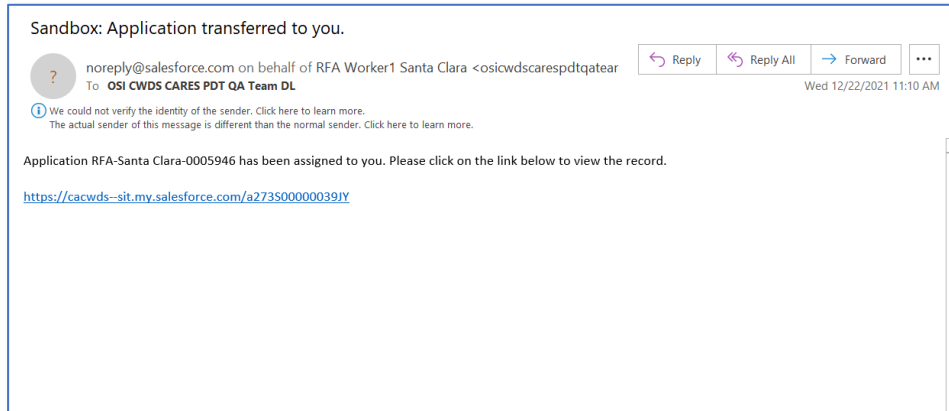
- The **Change Owner** popup window closes, and you are returned to the **Application** page.
- At the top of the page, a green message box will display stating you have successfully changed the application owner.



RFA Worker1 Santa Clara now owns the record for RFA-Santa Clara-0005946.

Application Type	Owner	Status	Days Since Application Received	Days Since Child Placed
Relative Application	RFA Worker1 Santa Clara	Pending	1	

9. Once an application is assigned, you will receive an email notification that you have an application assigned to you. The email includes a link to the application.



10. The next time you log into CARES RFA, you will now see the assigned application on your **Home** page in **My Assigned Applications** section.

11. In the **Application Number** column, click the link to the application.

The **Application** page displays. You can now view, modify, and work the application to completion.

Self-Directed Exercise

Please complete the following exercise on your own. You can refer to the demo exercise for the steps, and/or reach out to the instructor for assistance.

Scenario

The scenario for this self-directed exercise is the same as the scenario above, however, you will be using a different application. Please refer to your case data sheet for details.

Actions to complete this exercise:

- Locate the application in your county's unassigned queue
- Assign the application to yourself

Congratulations! You have reached the end of **Module 3: Assignment of Applications**.