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IWDS 2.0 Instructions Guide: Intake Assignment Management

Overview

Intake Assignment Management lets Data Stewards and Super Users pick which staff member automatically receives new applications for each office in their LWIA.

What changed:

Before this release, new customers were assigned to the first active Data Steward (alphabetical) for the LWIA. LWIAs asked to route new customers to a dedicated intake staff member instead, and that person can be different at each office.

Who can use it:

Users with the **Data Steward** or **Super User** role. You can only manage offices in the LWIA(s) assigned to you.

What you can do:

- Assign one staff member to several offices at once (Bulk Assignment)
- Assign or change intake staff one office at a time (Office Assignments)
- Remove an assignment
- See which offices don't have intake staff yet, on this page and on your home page

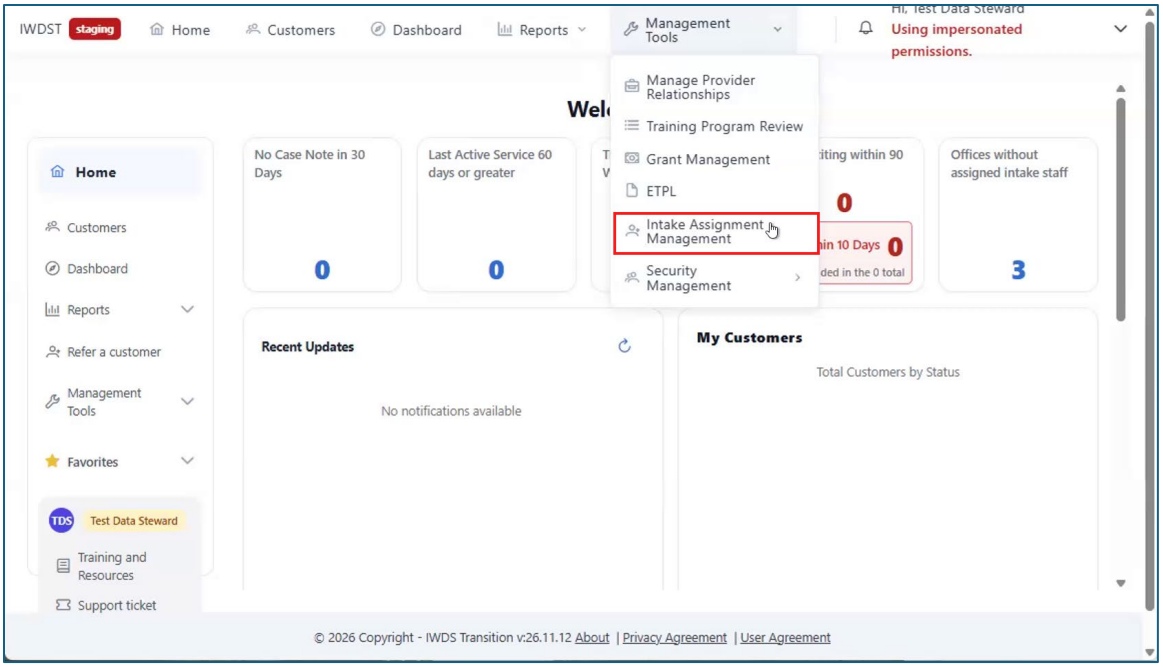
What did not change:

When staff start an intake themselves and choose the office and career planner, the process works the same as before. In that case, the intake assignment process is bypassed because the career planner has already been set.

> *Screenshots in this guide come from IWDS test accounts in the **staging** environment. Real staff names are blurred. No production screenshots are used.*

Open Intake Assignment Management

1. Sign in to IWDS.
2. In the top navigation, select **Management Tools**.
3. Select **Intake Assignment Management**.



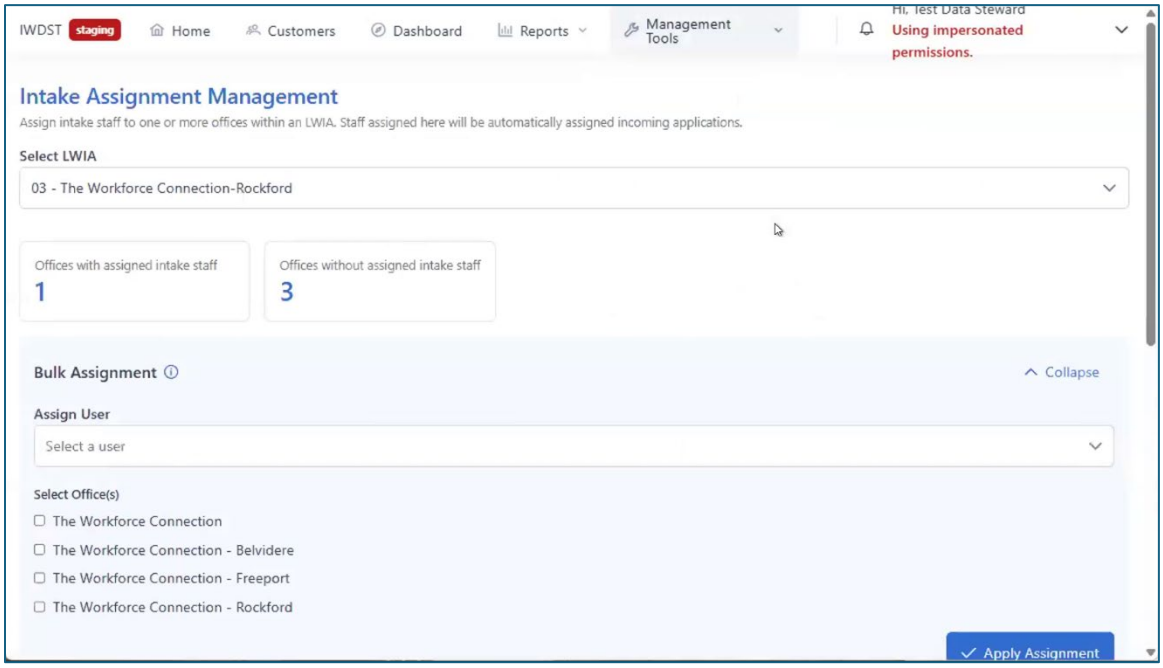
Staging environment, Data Steward test account.

If you don't see the option, check that your account has the Data Steward or Super User role.

Page Layout and LWIA Selection

The page has four parts, top to bottom:

Area	What it does
Select LWIA	Choose which LWIA's offices to manage
Summary tiles	Show how many offices have intake staff and how many don't
Bulk Assignment	Assign one staff member to several offices at once
Office Assignments	View and change intake staff for each office



Staging environment, Data Steward test account.

Select an LWIA

1. Open the **Select LWIA** dropdown.
2. Choose the LWIA you want to manage.

The dropdown lists only the active LWIAs assigned to you, sorted by LWIA number. The first LWIA in your list is selected when the page opens. If you're assigned to one LWIA, it's the only one you'll see.

Read the summary tiles

After you select an LWIA, two tiles appear:

- **Offices with assigned intake staff**
- **Offices without assigned intake staff**

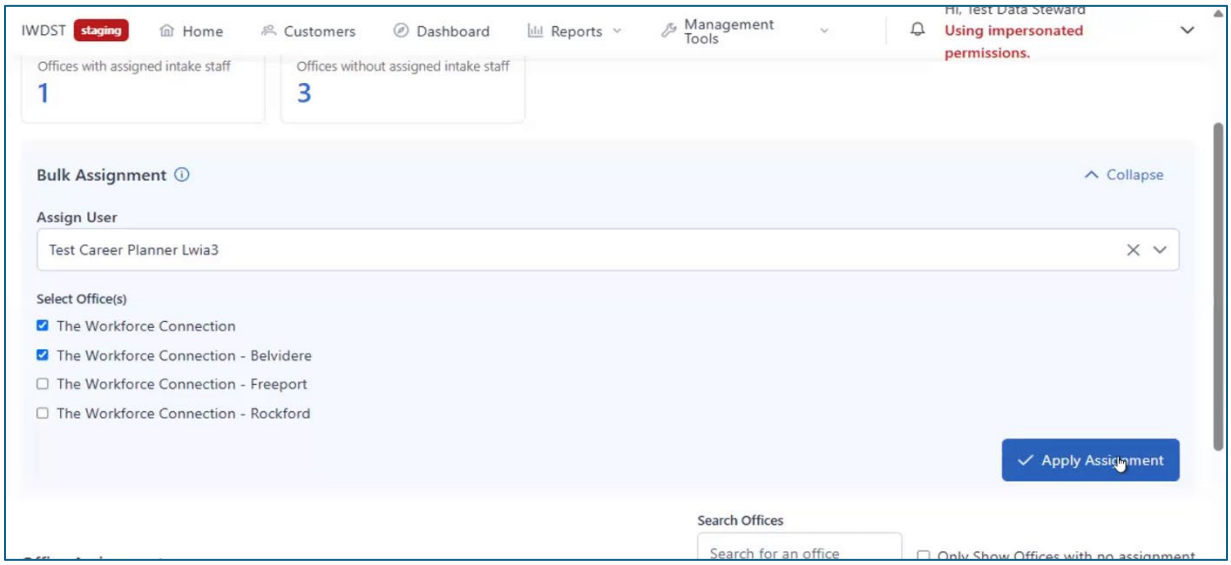
The tiles update each time you save a change.

Assign Intake Staff in Bulk

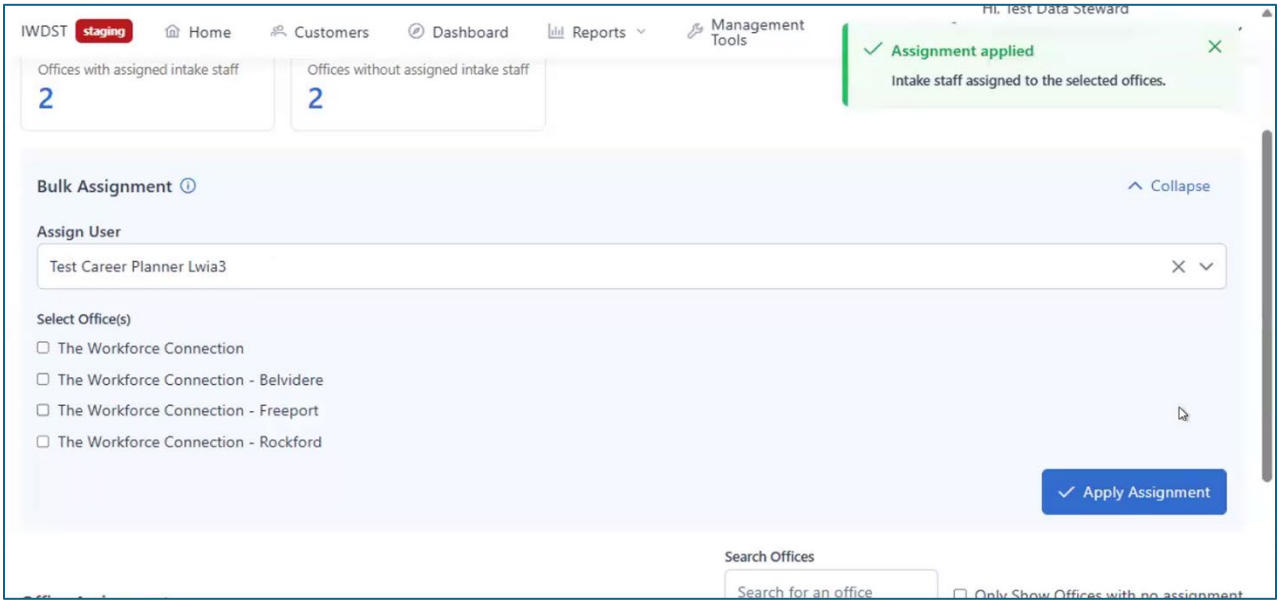
Use **Bulk Assignment** to make one staff member the intake staff for several offices in one step. Select **Collapse** or **Expand** to hide or show this section.

1. Select your LWIA.
2. In **Bulk Assignment**, open the **Assign User** dropdown and choose a staff member.
3. Under **Select Office(s)**, check each office this person should cover. You can check one, several, or all.
4. Select **Apply Assignment**.

5. An "Assignment applied" message appears (Intake staff assigned to the selected offices), and the **Office Assignments** table shows the new assignments.



A user is selected and two offices are checked, ready for Apply Assignment.



The Assignment applied message and the updated summary tiles.

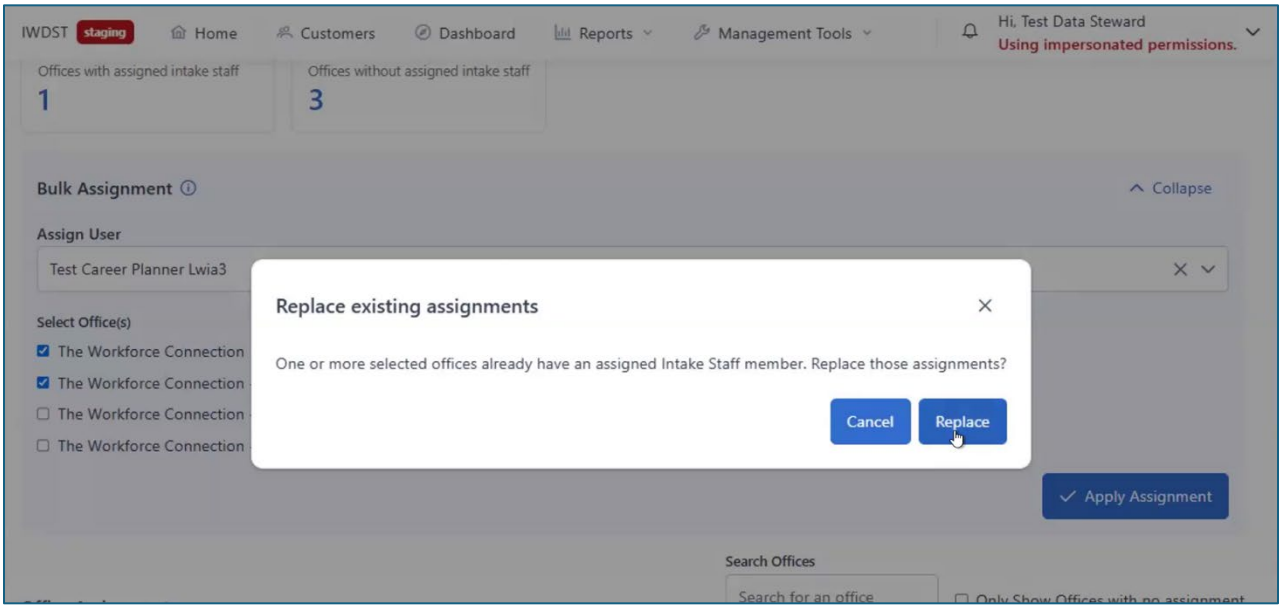
If offices already have intake staff

If any office you checked already has intake staff, IWDS asks you to confirm before replacing them. A Replace existing assignments window opens:

> *"One or more selected offices already have an assigned Intake Staff member. Replace those assignments?"*

- Select Replace to replace the current intake staff for those offices.

- Select Cancel to keep the current assignments.



The confirmation window appears when a checked office already has intake staff.

Required fields

You must choose a user **and** check at least one office. If either is missing, a validation message appears and nothing is assigned.

> ***Tip:*** *The staff member must have every checked office on their user profile. See Who Can Be Assigned to an Office below.*

Assign Intake Staff One Office at a Time

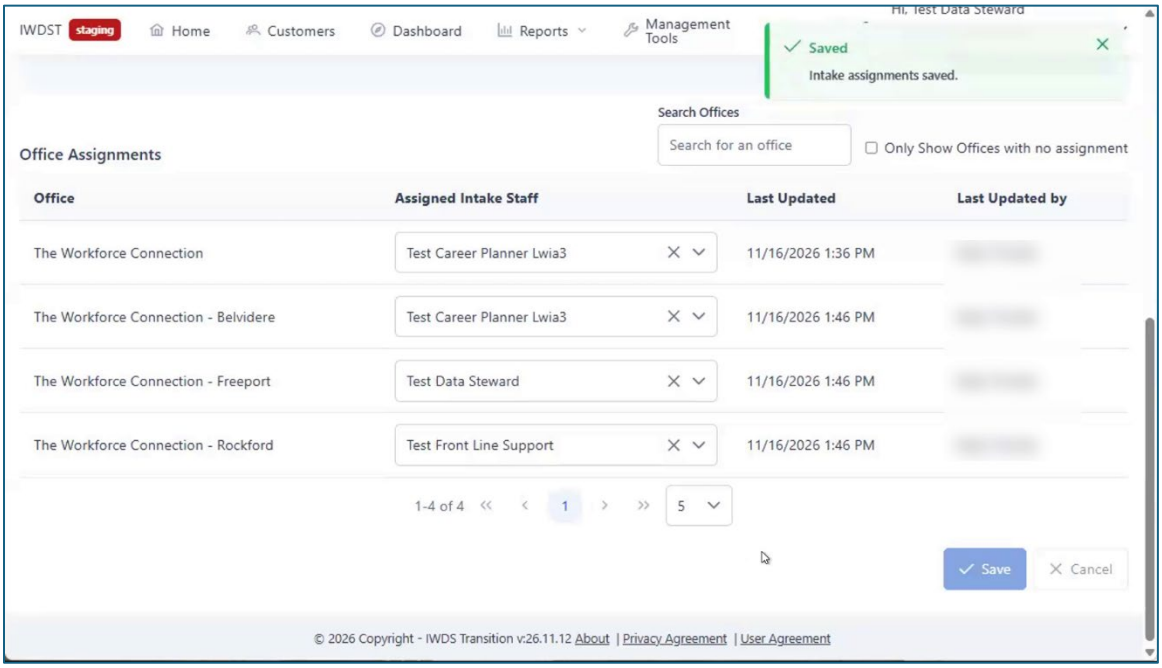
Use **Office Assignments** when offices have different intake staff, or to change a single office. The table lists every active office in the LWIA you selected.

Column	Shows
Office	Office name
Assigned Intake Staff	Dropdown with the current intake staff member
Last Updated	Date and time of the last change
Last Updated By	Who made the last change

Assign or change intake staff

1. Find the office in the table.
2. Open its **Assigned Intake Staff** dropdown (it reads Select intake staff when empty). Type part of a name to search, then choose a staff member.
3. Repeat for any other offices you want to change.
4. Select **Save**.

A **Saved** message appears (Intake assignments saved), and the Last Updated columns refresh.

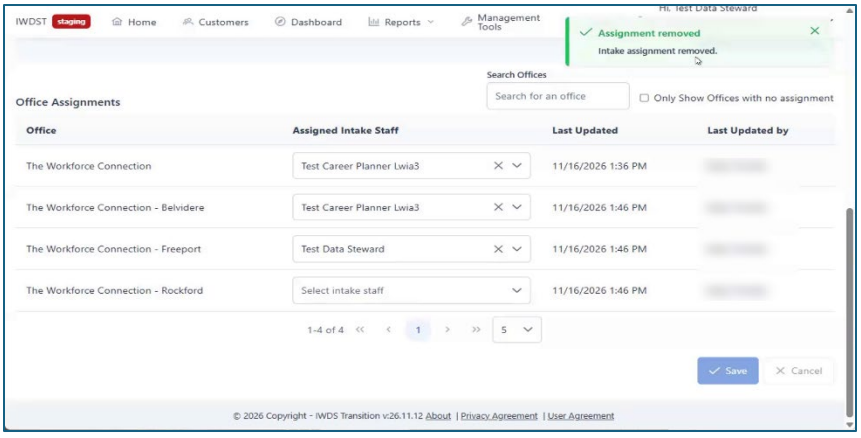


Staging environment. Names in Last Updated By are blurred.

To throw away changes you haven't saved, select **Cancel**.

Remove an assignment

1. In the office's **Assigned Intake Staff** dropdown, select the **X** to clear it.
2. Select **Save**.
3. An "Assignment removed" message appears (Intake assignment removed), and the office's dropdown goes back to Select intake staff.



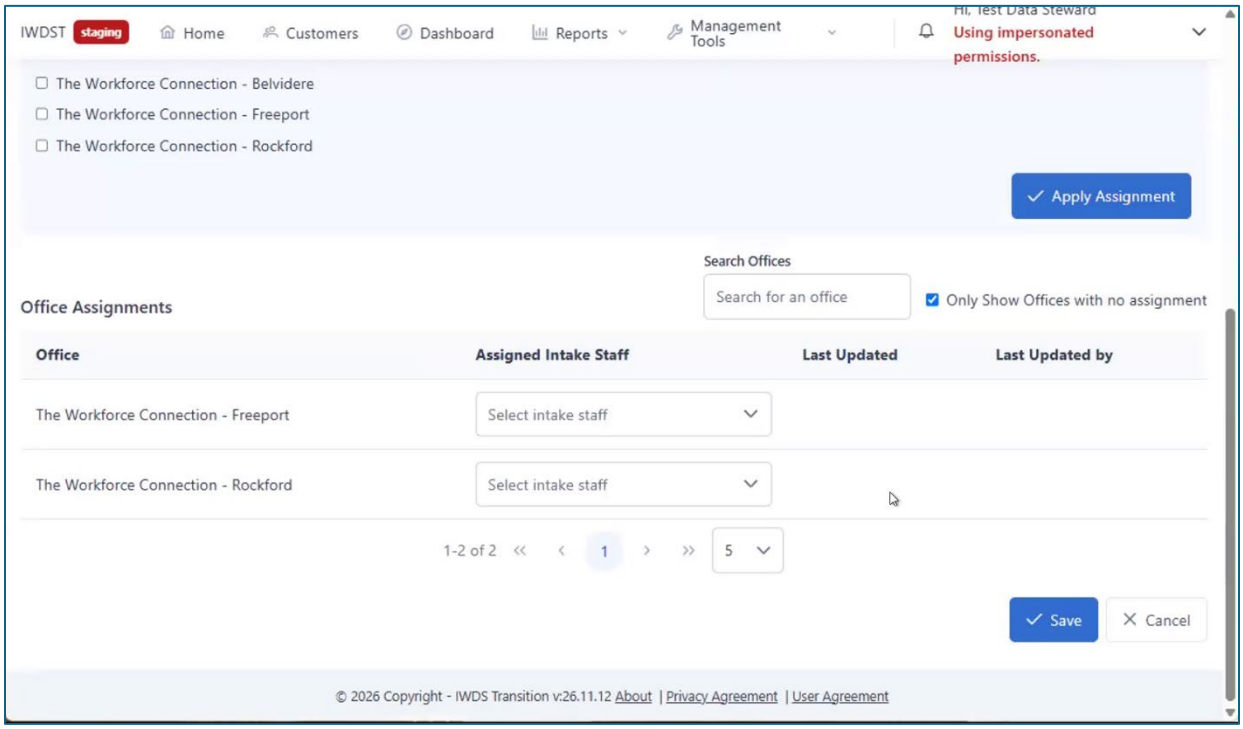
The Rockford office was cleared and saved.

New applications for that office then go to the first active Data Steward (alphabetical) for the LWIA.

Find offices quickly

- **Search Offices:** type part of an office name to filter the table.
- **Only Show Offices with no assignment:** check this box to see only offices that still need intake staff.

- Use the page controls under the table to move between pages or show more rows per page.



Only Show Offices with no assignment is checked, so only the two unassigned offices appear.

Who Can Be Assigned to an Office

A staff member can only be intake staff for offices on their user profile. This applies to Bulk Assignment and Office Assignments.

If you try to assign someone to an office they aren't associated with, the assignment doesn't go through and this message appears:

> ***Office Assignment Failed.*** *User cannot be assigned for intake due to not being assigned to [Office Name(s)] on user profile.*

The message names each office that blocked the assignment.

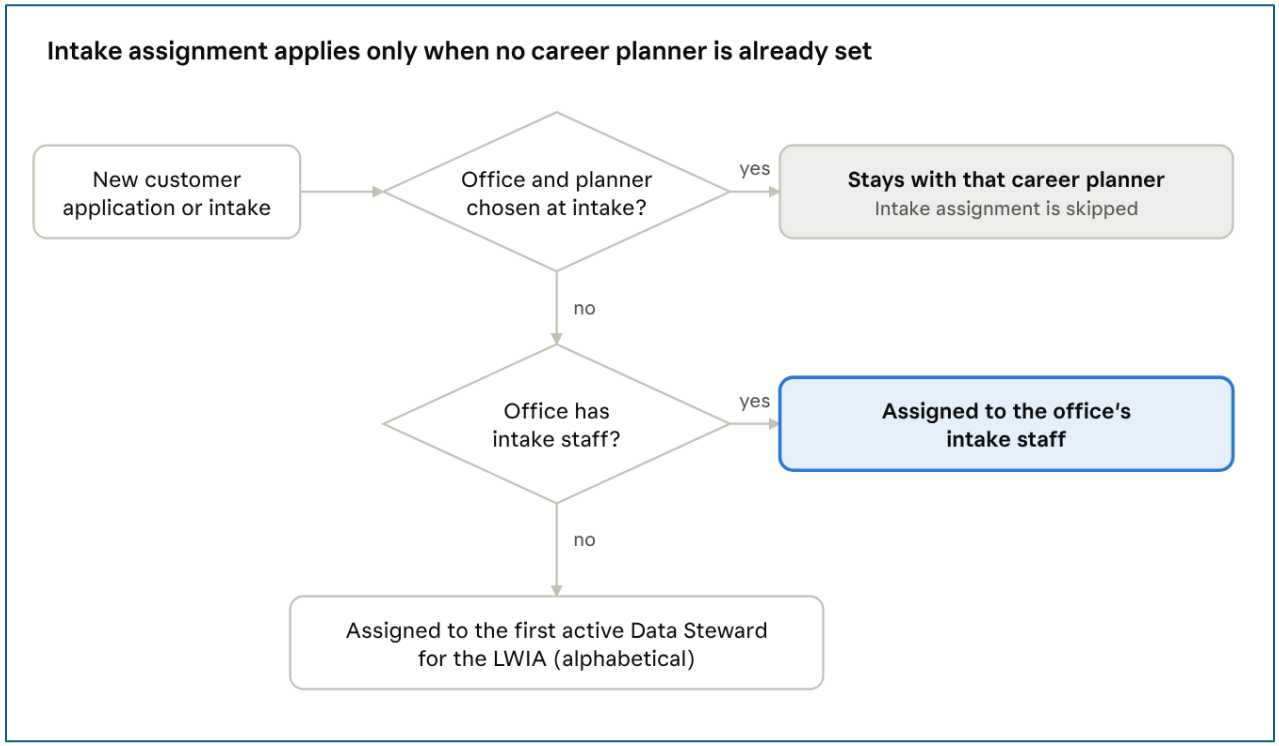
To fix it:

1. Add the office(s) named in the message to the staff member's user profile.
2. Return to Intake Assignment Management and try the assignment again.

Example: Jordan has Office B and Office C on their profile, but not Office A. Jordan can be intake staff for B and C. To make Jordan intake staff for A, add Office A to Jordan's profile first.

How New Applications Are Assigned

When a new customer comes in, IWDS first checks whether an office and career planner were already chosen at intake. If not, it checks whether the office has intake staff.



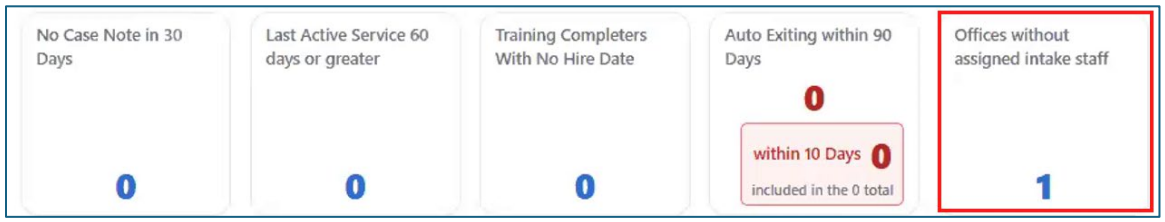
How a new application is assigned

If an office and career planner were chosen at intake, the customer stays with that career planner and intake assignment is skipped. Otherwise, if the office has intake staff, the customer is assigned to that person automatically. If not, the customer goes to the first active Data Steward (alphabetical) for the LWIA, the same as before this release.

> ***Note:*** *If a customer is assigned an office and career planner at intake, the intake assignment process is bypassed because the career planner has already been set. Intake assignments only apply when no career planner has been chosen.*

Home Page Tile: Offices Without Assigned Intake Staff

Your home page now has an **Offices without assigned intake staff** tile. It counts the offices you're associated with that don't have intake staff yet.



Staging environment, Data Steward test account.

- The tile counts **offices**, not customers. Customers are still assigned even when an office has no intake staff.
- Use it to spot gaps in coverage, then assign intake staff on the Intake Assignment Management page.

Common Tasks

Cover for staff who are out (for example, on vacation)

1. Use **Bulk Assignment** to assign a backup staff member to the absent person's offices, and confirm the replacement.
2. When the staff member returns, repeat the steps to assign their offices back to them.

Set the same intake staff for every office

1. In **Bulk Assignment**, choose the staff member.
2. Check every office, then select **Apply Assignment**.

Find offices that still need coverage

Check **Only Show Offices with no assignment** in Office Assignments or watch the **Offices without assigned intake staff** tile on your home page.

Troubleshooting

Problem	Likely cause	What to do
Intake Assignment Management isn't in the Management Tools menu	Your account doesn't have the Data Steward or Super User role	Ask your administrator to check your role
An LWIA is missing from Select LWIA	The LWIA isn't assigned to you, or it's inactive	Ask your administrator to check your LWIA access
"Office Assignment Failed"	The staff member doesn't have that office on their user profile	Add the office to their profile, then try again
Validation message on Apply Assignment	No user chosen, or no office checked	Choose a user and check at least one office
Changes in the table disappeared	You left the page or selected Cancel before saving	Make the changes again and select **Save**

Frequently Asked Questions

Can an office have more than one intake staff member? Not right now. Each office can have one intake staff member. Multiple intake staff per office is logged as a possible future enhancement.

Can one person be intake staff for several offices? Yes. Use Bulk Assignment or choose the same person in each office's dropdown.

What happens if an office has no intake staff? New applications for that office go to the first active Data Steward (alphabetical) for the LWIA, the same as before this release.

Does the home page tile mean customers aren't being assigned? No. The tile counts offices without intake staff. Customers are still assigned.

Does this change how I start an intake? No. Choosing the office and career planner when you start an intake works the same as before. When a career planner is chosen at intake, the intake assignment process is skipped, and the customer stays with that career planner.

Need Help?

Submit a support ticket from the IWDS sidebar or see Training and Resources.

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