



Texas Department of
Family and Protective Services

Assign Workload

Job Aid

Contents

Assignment Email Notifications from Assign Page	3
Overview	3
Assignment Email Notifications – How to Get There.....	3
Using Automatic Assignment Email Notifications	3
Prohibiting Automatic Assignment Email Notifications	4
Assignment Email Notifications - System Validations and Error Messages.....	5
System Validation Error Message – Blank Fields.....	5
System Validation Error Message – Incorrect Email Address	6
Important Notes about Assignment Email Notifications	7

Assignment Email Notifications from Assign Page

Overview

IMPACT 2.0 has added new email functionality to the **Assign** page for Investigation (INV) and Alternative Response (AR) staff with permission to assign cases.

IMPACT 2.0 can now send an assignment email notification to the primary and/or secondary worker(s) any time they have been assigned a stage.

Once the stage has been assigned, an assignment email notification will be automatically triggered – unless the person assigning the stage specifically requests no email be sent.

All other functionality on the **Assign** page and the process of assigning stages remains unchanged.

Stages Impacted: INV, AR

Assignment Email Notifications – How to Get There

To navigate to your **Assign** page where the assignment email notification sections are, follow these steps:

1. Start from the **My Tasks** tab on your **Assigned Workload** page.
2. Locate the Case for which you are the primary worker (designated with the letter “P” under the column **P/S**), and select the corresponding checkbox for that case.
3. Select the **Assign** button to be redirected to the **Assign** page.

The screenshot displays the 'Assigned Workload' page. At the top, there are navigation tabs: 'My Tasks', 'Case', 'Search', 'Reports', and 'Resources'. Below these, there are sections for 'Workload' and 'Assigned Workload'. The 'Assigned Workload' section shows user information and a table of tasks. The table has the following columns: SS, WS, Hr, P/S, M-Ref, Stage Name, County, Stage, Type, Opened, Assigned, Region, Unit, Stage ID, Case ID, and PGM. The 'P/S' column is highlighted in red. The second row of the table is selected, and its checkbox is checked. An 'Assign' button is located in the bottom right corner of the page.

SS	WS	Hr	P/S	M-Ref	Stage Name	County	Stage	Type	Opened	Assigned	Region	Unit	Stage ID	Case ID	PGM
			P			HARRIS	SUB	REG	01/03/2019	01/03/2019	06	11			CPS
<input checked="" type="checkbox"/>			P			LIBERTY	INV	PHNG2	05/06/2018	05/06/2018	06	11			CPS
<input type="checkbox"/>			P			BRAZORIA	INV	PHAB1	10/10/2018	10/10/2018	06	11			CPS
<input type="checkbox"/>			P			HARRIS	INV	MDNG1	09/10/2018	09/10/2018	06	11			CPS
<input type="checkbox"/>			P			HARRIS	INV	PHAB1	07/15/2018	07/18/2018	06	11			CPS
<input type="checkbox"/>			P			HARRIS	FSU	REG	01/03/2019	01/03/2019	06	11			CPS

Using Automatic Assignment Email Notifications

To have IMPACT 2.0 send out automatic assignment email notifications, follow these steps:

1. On the **Assign** page, select staff members as primary or secondary assignments from the **Available Staff** table.
2. Expand the **Primary Email Notification** section.

3. Inspect the **To** field to ensure the email address of the staff member(s) you have selected has prefilled into the field. You can edit this field (e.g., add other recipients, send a copy of the email to yourself, etc.).
4. Inspect the **Subject** field to determine if it is prefilled with the standard text. You can edit this field as well.
5. Enter a message in the **Message Text** field.
6. Repeat the process for the **Secondary Email Notification** section.
7. Select the **Save** button to save the **Assign** page and to send the assignment email notification(s).

The screenshot shows the 'Assign' page in IMPACT 2.0. At the top, there is a 'Staff To-Do List' and a search bar. Below that, there are 'Search Parameters' for 'Full Unit (User's County Only)' and 'On-Call'. A table of 'Available Staff' lists staff members with columns for Unit, Staff Name, Last Assigned, Time, Phone, Ext, and Office Name. Below the table, there are 'Assignments' and a 'Phone' section. On the right side, there are two sections for email notifications: 'Primary Email Notification' and 'Secondary Email Notification'. Each section has a checkbox for 'Do not send [primary/secondary] assignment email', a 'To' field, a 'Subject' field, and a 'Message Text' field. Red arrows point from the 'Primary Email Notification' and 'Secondary Email Notification' sections in the left sidebar to the corresponding sections on the right. A 'Save' button is located at the bottom right of the page.

Prohibiting Automatic Assignment Email Notifications

Follow these steps to prohibit IMPACT 2.0 from sending out an automatic **Assignment Email Notification** from the **Assign** page:

1. On the **Assign** page, select staff members as primary or secondary assignments from the **Available Staff** table.
2. Expand the **Primary Email Notification** and **Secondary Email Notification** sections.
3. Select the checkbox for the item(s) **Do not send primary assignment email.** and/or **Do not send Secondary assignment email.** if you do *not* want to send a primary and/or secondary assignment email notification. If you do not select the checkbox(es), IMPACT 2.0 will automatically send out assignment email notification(s) to the primary and/or secondary worker(s) whose email address(es) have prefilled into the **To** field.

Assign

Search Parameters
 Full Unit (User's County Only)
 On-Call

County:

Available Staff

Primary Email Notification

Do not send primary assignment email

To:

Subject: You have received a new primary assignment on your workload.

Message Text: Test

Ext: Office Name:

Hempstead
Houston
Pearland
Houston
Houston

Primary Secondary Select Staff

Assignments

Secondary Email Notification

Do not send Secondary assignment email

To:

Subject: You have received a new secondary assignment on your workload.

Message Text: Test

Primary/Secondary

Primary
Secondary
Secondary

Un-assign

Phone
Primary Email Notification
Secondary Email Notification

Assignment Email Notifications - System Validations and Error Messages

There are several system validations in IMPACT 2.0 that will prevent you from saving the page and will generate error messages. Examine any error messages that appear upon attempting to save the page.

System Validation Error Message – Blank Fields

If you leave the checkbox blank for either **Do not send primary assignment email.** or for **Do not send secondary assignment email.** and then delete the prefilled email address(es) in the **To** field and the message in the **Subject** field, the system will generate one of four possible validation error messages and you will be unable to save the page.

Assign

Your information contains 1 error(s)

- To: Please check the checkbox or complete the To field for primary assignment

Search Parameters
 Full Unit (User's County Only)
 On-Call

County:

Available Staff

Unit	Staff Name	Last Assigned	Time	Phone	Ext	Office Name
<input type="radio"/>		10/04/2018	08:00 AM			Hempstead
<input checked="" type="radio"/>		10/10/2018	02:16 PM			Houston

Workload

Staff To-Do List

Workload

Assign

❗ Your information contains 1 error(s)

- Subject:** Please check the checkbox or complete the Subject field for primary assignment

Search Parameters

Full Unit (User's County Only)
 On-Call

County:

Search

Available Staff

	Unit	Staff Name	Last Assigned	Time	Phone	Ext	Office Name
<input type="radio"/>	11	[REDACTED]	10/04/2018	08:00 AM			Hempstead
<input checked="" type="radio"/>	11	[REDACTED]	10/10/2018	02:16 PM			Houston

Workload

Staff To-Do List

Workload

Assign

❗ Your information contains 1 error(s)

- To:** Please check the checkbox or complete the To field for secondary assignment

Search Parameters

Full Unit (User's County Only)
 On-Call

County:

Search

Available Staff

	Unit	Staff Name	Last Assigned	Time	Phone	Ext	Office Name
<input type="radio"/>	11	[REDACTED]	10/04/2018	08:00 AM			Hempstead
<input checked="" type="radio"/>	11	[REDACTED]	10/10/2018	02:16 PM			Houston

Workload

Staff To-Do List

Workload

Assign

❗ Your information contains 1 error(s)

- Subject:** Please check the checkbox or complete the Subject field for secondary assignment

Search Parameters

Full Unit (User's County Only)
 On-Call

County:

Search

Available Staff

	Unit	Staff Name	Last Assigned	Time	Phone	Ext	Office Name
<input type="radio"/>	11	[REDACTED]	10/04/2018	08:00 AM			Hempstead
<input checked="" type="radio"/>	11	[REDACTED]	10/10/2018	02:16 PM			Houston
<input type="radio"/>	11	[REDACTED]	10/11/2018	10:57 AM			Pearland

System Validation Error Message – Incorrect Email Address

Additionally, you will receive an error message and be unable to save the page if you enter an email address not in the DFPS domain, or if the email is not in a standard email address format.

Workload

Staff To-Do List

Workload

Assign

⚠ Your information contains 1 error(s)

- 📧 You have entered an email address that is not a DFPS email address.

Search Parameters

Full Unit (User's County Only)

On-Call

County:

Search

Available Staff

	Unit	Staff Name	Last Assigned	Time	Phone	Ext	Office Name
<input type="radio"/>	11	[REDACTED]	10/04/2018	08:00 AM			Hempstead
<input checked="" type="radio"/>	11	[REDACTED]	10/10/2018	02:16 PM			Houston

Workload

Staff To-Do List

Workload

Assign

⚠ Your information contains 1 error(s)

- 📧 Please enter a valid email address

Search Parameters

Full Unit (User's County Only)

On-Call

County:

Search

Available Staff

	Unit	Staff Name	Last Assigned	Time	Phone	Ext	Office Name
<input type="radio"/>	11	[REDACTED]	10/04/2018	08:00 AM			Hempstead
<input checked="" type="radio"/>	11	[REDACTED]	10/10/2018	02:16 PM			Houston

Important Notes about Assignment Email Notifications

- Emails sent from IMPACT 2.0 can be accessed only through the Microsoft Outlook account of the *recipient*. Sent email is **not** accessible to the sender in IMPACT 2.0, nor will you automatically receive a copy in your **Sent** mailbox in Outlook.



Note: If you want a copy of the email in your own Outlook mailbox you would need to add your email as a recipient to receive a copy in your Outlook Inbox.

- Once you select a primary or secondary worker, their email address prefills into the **To** field. If you then change the assignment before saving the page, you would have to delete the email address of the original worker – IMPACT 2.0 will only add the new selection, not replace your first selection.
- If you are assigning more than one secondary, but decide not to send an assignment email notification to one of them, you can choose to erase their email from the **To** field.



Note: Remember, unless you select the checkbox to prohibit sending out an assignment email notification, the **To** field must contain at least one email address.