

# 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	
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.

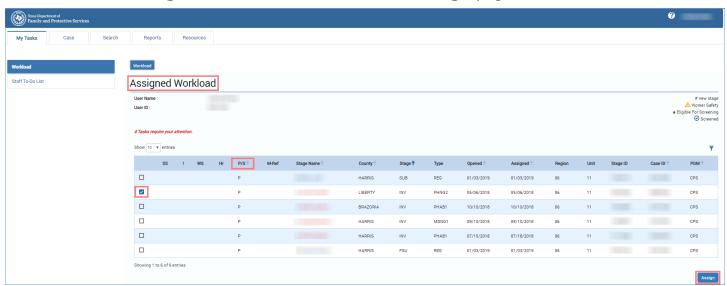
All other functionality on the **Assign** page and the process of assigning stages remains unchanged.

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.

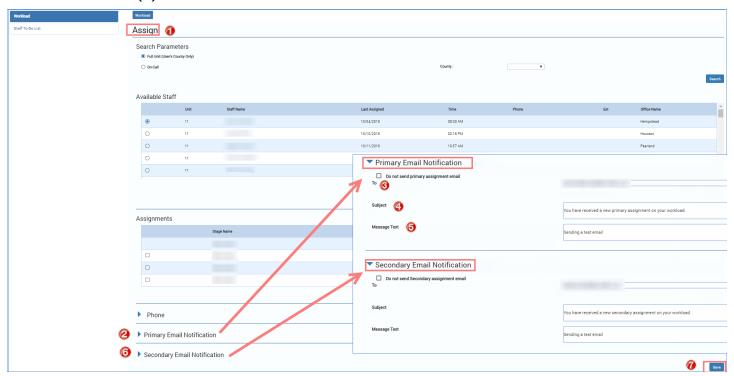


#### **Using Automatic Assignment Email Notifications**

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.

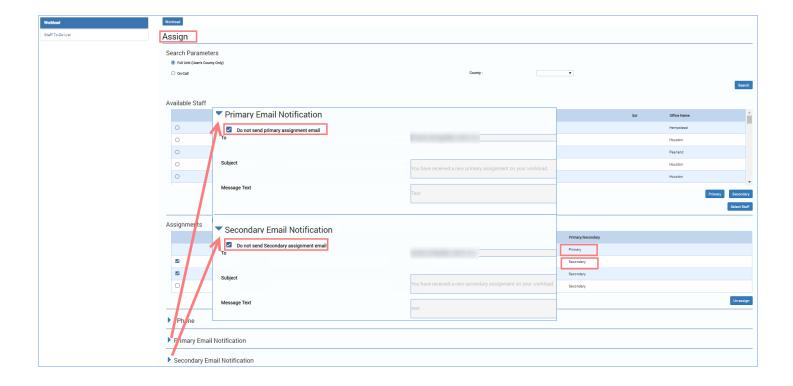
- 3. Inspect the **To** field to ensure the email address of the staff member(s) you have selected has prefilled into the field. You can edit this field (e.g., add other recipients, send a copy of the email to yourself, etc.).
- 4. Inspect the **Subject** field to determine if it is prefilled with the 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).



#### **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 <u>not</u> 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.

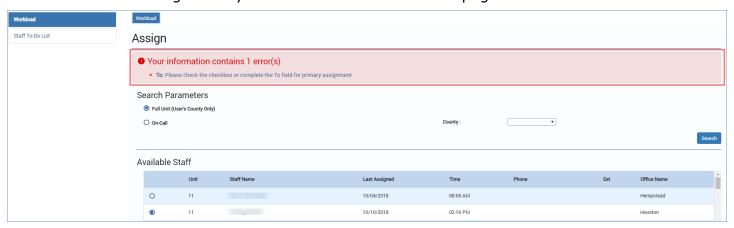


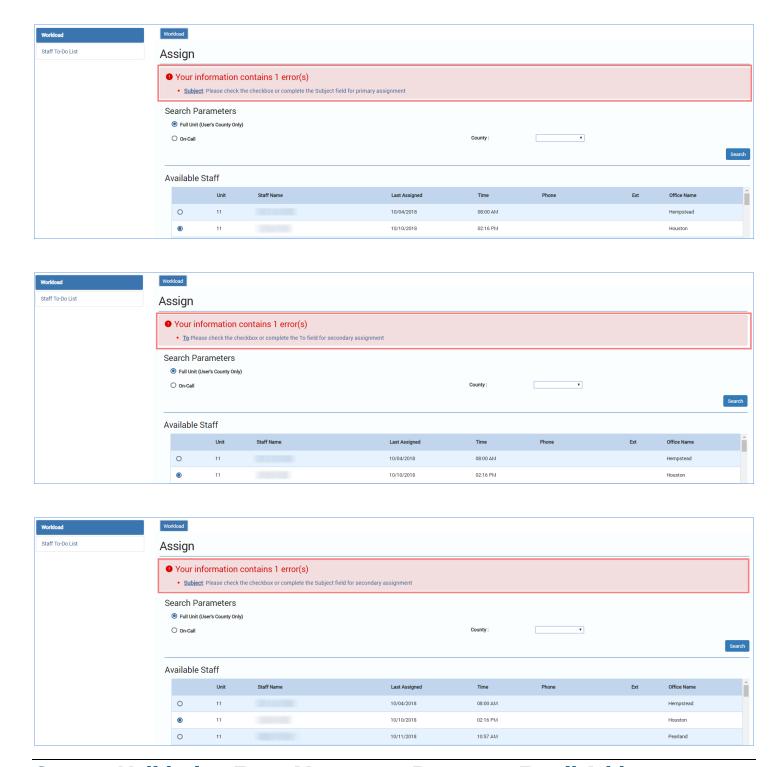
# **Assignment Email Notifications - System Validations and Error Messages**

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

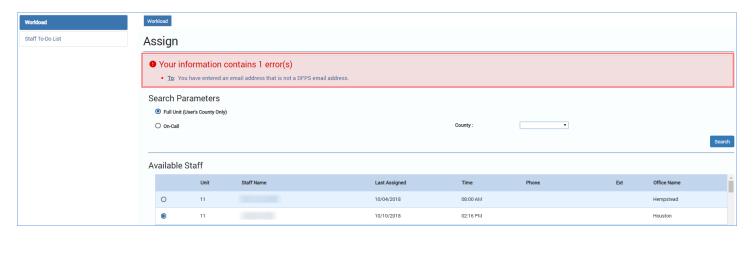
If you leave the checkbox blank for either **Do not send primary assignment email.** or for **Do not send secondary assignment email.** and then delete the prefilled email address(es) in the **To** field and the message in the **Subject** field, the system will generate one of four possible validation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





# **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.





### **Important Notes about Assignment Email Notifications**

a. 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.

- b. 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.
- c. 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, <u>unless you select the checkbox</u> to <u>prohibit</u> sending out an assignment email notification, the **To** field must contain at least <u>one</u> email address.