

Bulk Assignment of Case Handling (by Category & Location)

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Bulk Assignment Matrix - Configuring which Providers handle which categories of Cases

For Case Administrators, often depending on either hospital rosters or the availability of particular case workers, you may wish to set up which providers are the default assignee for new cases of a given category.

The functionality below requires *Can assign cases to others* and *Case administrator*.

Note that this only applies to case categories, where the assignment is **By Category & Location**. Locations must be **Enabled for Cases**.

Assign a case worker to a given location, category

Here, the *Bulk Assignments* user interface allows you to configure which providers are configured.

Bulk Assignments							Compact ▾
Name	ADL	Clintel Clinic	default	Hobart	MEL	Test	
Test by Cat/Loc1 (form, expects daily)	JK (1)	HBW	—	HBW (1)	TB	MS	
Test by Cat/Loc2 (form, not expects daily)	TB (1)	BR	HBW	HBW	TP	TB	
Test by Cat/Loc3 (no form)	JK (6)	— (1)	TP	—	—	—	

To assign your first provider, find the case category in the table and click on the dash, to choose which case worker is best suited.

Bulk Assignment

Choose assignment for **General 2** at **Hobart**

Case Worker

Dr Luciano Ebert

✕ ▾

Save

Cancel

To remove, simply repeat the process and clear your selected case worker.

Viewing the current configuration

The bulk assignments matrix shows both locations and case categories. Individual cells show provider initials and, in parentheses, the number of open cases.

Cell colour definition
Blue: Has a provider, but no open cases;
Orange: No provider and no open cases;
Red: Open cases, but no case worker.

Selecting Compact shows location names, while Expanded shows location descriptions.

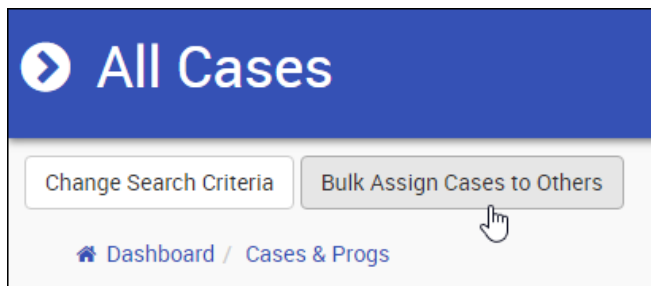
For cells with open cases, the text is clickable, enabling you to change or define the assigned provider.

Bulk Assignments							Compact ▾
Name	ADL	Clintel Clinic	default	Hobart	MEL	Test	
Test by Cat/Loc1 (form, expects daily)	JK (1)	HBW	—	HBW (1)	TB	MS	
Test by Cat/Loc2 (form, not expects daily)	TB (1)	BR	HBW	HBW	TP	TB	
Test by Cat/Loc3 (no form)	JK (6)	— (1)	TP	—	—	—	

Bulk Assignments							Expanded ▾
Name	Banksia Park Clinic	Default	Melbourne	Perth	Sydney	Test	
anxiety	—	OC (2)	—	—	sa	TB	
Test 1	—	JK (1)	JK	JK	JK	JK (1)	

Reassigning case categories in bulk

The Bulk Assignment tool is used to change the assignment of a provider to one or more locations and select one, or more, case categories. From the All Cases screen, select **Bulk Assign Cases to Others**



In the Select Provider field, select a provider and then click **Next**.

Select Provider

Dr Andrea Flynn

×

▾

Next

Cancel

The Current Assignment panel displays the current assignment of location and case categories. To remove these assignments, click **Remove Current Assignment**

To change an assignment, in the Change Assignment panel, select one or more locations in the **Change Assignment** panel and then click **Next**.

Note that only locations with the "Enabled for cases" setting of "Yes" will appear as a selection.

Current Assignment - Dr Andrea Flynn

- Bowen Hills: anxiety
- Camperdown Day Suite: alcohol

Remove Current Assignment

Change Assignment

Select locations for **Dr Andrea Flynn**:

☐ Select All

☐ Archived Location

☐ Banksia Park Clinic

☒ Bowen Hills

☐ Brisbane Clinic

☐ Broken Hill Clinic

☐ Burswood Day Facility

☒ Camperdown Day Suite

☐ Westmead Clinic

Next

Cancel

In the Case Categories panel, select one or more case categories for each location, as needed, then click **Assign Selections**.

Case Categories

Select case categories for **Dr Andrea Flynn**:

Bowen Hills

☒ alcohol

☒ anxiety

Camperdown Day Suite

☒ alcohol

☐ anxiety

Assign Selections

Cancel