

CSR Navigator – Allocating Service Requests

Introduction

This guide will show how to allocate Service Requests from the Client Service Request Navigator screen

NSQHS



Governance for Safety and Quality in Health Service Organisations.

Name(ID)	AUID/Gender/DOB	Phase	Notes	Asses
INFANT, Test (Master) (922071)	Male 01-Aug-2015	Intake	?	
BLAGECALCTESTINFANT, Junior	Male 31-Jan-2015	Intake	?	

From a populated Navigator screen click on the service request you would like to allocate

Select the **Allocate** button
Right clicking will also bring up the option to **Allocate**

NB: You can select more than one Service Request to allocate in the same status phase by holding the control key on your keyboard

Allocated Provider Details

Organisation Unit: CS Keep Them Safe - Whole Family Team D&A

Position: Case Worker DACS

Individual Provider: LILLEWHYTE, Barry (Mr) (55652)

Not to be allocated Service Requests

Action: [Dropdown menu]

Status: [Text field]

Service Delivery Setting: Community Service delivery setting

Start Date: <dd-MMM-yyyy>

OK Cancel

The Allocated Provider Details box will open

The screenshot shows the 'Allocated Provider Details' form with the following fields:

- Organisation Unit: DACS Keep Them Safe - Whole Family Team D
- Position: Case Worker DACS
- Individual Provider: LILLEWHYTE, Barry (Mr) (55652)
- Not to be allocated Service Requests
- Action: (Dropdown menu highlighted in yellow)
- Status: (Dropdown menu showing 'Allocate Ownership' and 'Accept Ownership')
- Service Delivery Setting: Community Service delivery setting
- Start Date: <dd-MMM-yyyy>

Buttons: OK, Cancel

Under the **Action** tab select the action you would like to take

The screenshot shows the 'Allocated Provider Details' form with the following fields:

- Organisation Unit: CS Keep Them Safe - Whole Family Team D&A
- Position: Case Worker DACS
- Individual Provider: LILLEWHYTE, Barry (Mr) (55652)
- Not to be allocated Service Requests
- Action: (Dropdown menu highlighted in yellow)
- Status: (Dropdown menu showing 'Re-Assign Ownership')
- Service Delivery Setting: Community Service delivery setting
- Start Date: <dd-MMM-yyyy>

Buttons: OK, Cancel

If the Client Service Request Navigator is already accepted by another Individual Provider:

a. Select the new **Individual Provider** the Service Request is to go to
NB: This can only be from the same team

b. Select **Re-Assign Ownership**

	<p>Click OK</p>
	<p>The Service Request will now display as Accepted under the Status column.</p>