



Manage Case Load

Case Assignment

Each case in ICOTS is ultimately assigned to one user in both the sending and receiving states at any given time. This means that a user must be responsible for and assigned a case to complete an action and/or to complete activities. ICOTS allows for flexible case reassignment to allow for instances when the assigned user of a case is unavailable to complete an action or activity.

Determining Assignment

Supervising User of Sending State: Each case is assigned to the initiator of a Transfer Request or a Request for Reporting Instructions.

Supervising User of Receiving State: Each case is assigned to the user who provided reporting instructions for a case. This includes responding to a Request for Reporting Instructions or providing reporting instructions within a Transfer Request Reply. Whichever action takes place first.

Reassigning Cases

PO Supervisors: Has the ability to reassign cases from themselves, any POs or Supervisors to any of the previously named.

Compact Office: Has the ability to reassign from ANY user of ANY role to another user of ANY role.

The PO Supervisor Users and Compact Office Users have an option under their Users Tab, entitled Manage Case Load.

Assistants Compact Workload Offenders Reports Users Administrators Help

My Profile **Manage Case Load**

Select the user whose compact cases you wish to search or display.

From:

Unless another option is selected, 'default results' will return all open compact cases associated with the 'from' user.
The other options will filter the results and return matching results.

- Default Results
- ICOTS Case #
- ICOTS Offender #
- Offender Name Search

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The first screen allows you to choose the user you wish to reassign from based on their role.

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A list will appear of that user's entire case load unless specific case criteria were entered. A similar set of drop down choices appear to choose which user the case or cases will be transferred.

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My Profile **Manage Case Load**

[<< New Search](#)

Transfer Cases from: **kyca.icots@gmail.com**

To:

Showing 2260 of 2260 matches

Select	Level of Interest	ICOTS Offender #	Last name	First name	Compact Cases	Action Items
<input checked="" type="checkbox"/>	Supervising user of Receiving user for	48934	QUAIFE	JENNIFER	20156 : North Carolina to Kentucky	
<input checked="" type="checkbox"/>	Supervising user of Receiving user for	48942	COTTRELL	CARL	20164 : North Carolina to Kentucky	
<input checked="" type="checkbox"/>	Supervising user of Receiving user for	48943	KAHLEY	VANESSA	20165 : North Carolina to Kentucky	
<input checked="" type="checkbox"/>	Supervising user of Receiving user for	48945	SCOTT	JOHN	20167 : North Carolina to Kentucky	
<input checked="" type="checkbox"/>	Supervising user of Receiving user for	48947	LILLY	DEMARICO	20169 : North Carolina to Kentucky	
<input type="checkbox"/>	Supervising user of Receiving user for	48948	WIGGINTON	JACOB	20170 : North Carolina to Kentucky	

Once a case is reassigned, ICOTS creates a Case Note which records the details of the reassignment, including the date and time.

Reassigning Action Items only

Most relevant to users of the Supervisor Role, there are instances where a user will not be assigned a case, but has pending action items assigned to them that may also be reassigned via the Manage Case Load Feature in the same manner. The Level of Interest Column will state that the user “Has Action Items For” and will not include the reference of “Supervising User of.” Common occurrences include:

- Supervisor delegated an activity (*delegate means this user is designated to make the assignment for the activity*)
- Supervisor awaiting review of an activity for managed processes
 - *A PO submits a Transfer Request to their supervisor, the PO is still the Supervising User for the offender, but the supervisor has a pending action to review the Transfer Request. The case doesn't move with it.*
- Alternate user assigned to reply to a managed process (i.e. Violation Report Response, Case Closure Response, etc.)
 - *Managed Supervision Activities such as OVRs and Case Closure can only be initiated by the supervising user in the receiving state, but upon receipt in the sending state, the compact office can delegate or assign to another user to complete the replies.*

<input type="checkbox"/>	Has action items for	34223	Jones	Linda	33143 : Kentucky to Indiana	70144 : ViolationReport
<input type="checkbox"/>	Has action items for	34643	Abbott	Jim	33543 : Kentucky to North Carolina	68116 : TransferRequest
<input type="checkbox"/>	Has action items for	38123	Calhoun	Don	37223 : Kentucky to	42405 : TransferRequest

Jones	Linda	Offender Violation Report - awaiting review by Mindy Spring <small>(view all 3)</small>
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