# Manage Hotline History, Transfer, and Assign Step Action Table

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**User**

Hotline Worker, Hotline Supervisor.

**Process**

This step action table describes the actions needed to view the history of all transfers and assignments for a hotline, as well as transfer a hotline, and assign primary and secondary workers to a hotline.

**Introduction**

- The history will show a list of all current and historical counties, as well as primary and secondary workers. The list's default sort will show Open hotlines first and then by Start Date with most recent on top.
- The worker will be able to transfer a hotline to any other county. However, Hotline County Connection Center (HCCC) will not be an option for the transfer.
- Transferring a hotline to another county will move it from the sending county's Pending Hotline queue to its Pending Outgoing queue. It will also add the hotline to the receiving county's Pending Incoming queue.
- When transferring a hotline to another county, the current Primary Worker will be end-dated automatically when the target county accepts, and a "dummy worker" will be assigned in the accepting county. Accepting the hotline moves the hotline from the accepting county's Pending Incoming Queue to its Pending Hotline queue.
- The worker will be able to assign a hotline to another Primary Worker within the responsible county. When assigning a Primary Worker, the recipient Primary Worker must be a Hotline or Generalist worker with the appropriate training certification level.
- When assigning a hotline to another Primary Worker, the current Primary Worker will be end-dated automatically for the same date/time as when the new Primary Worker starts.
- The worker will be able to assign one or more Secondary Workers to the hotline. When adding a secondary worker, the start date will default to the current date and time. However, this date will be editable.

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## View History

| Step | Action |
| --- | --- |
| 1 | In the *Left Navigation* panel.<br>• Click **Queues**.<br>• Click **Pending Hotlines**. |
| 2 | On the *Pending Hotlines* page.<br>• Select a hotline by clicking the **Hotline ID**. |
| 3 | On the *Hotline Details* page.<br>• Click the **Transfer/Assign** button. |
| 4 | In the *Transfer/Assign* pop-up window, *Transfer/Assign History* section.<br>• Review the history details in the list. The list will show the current primary worker, any secondary worker(s), and counties for the hotline. It will also show the historical (previous) primary worker(s), any secondary worker(s), and counties for the hotline.<br>• Click the **Done** button.<br>The *Transfer/Assign* pop-up window will close. |

## Transfer County

| Step | Action |
|---|---|
| 1 | In the *Left Navigation* panel.<br>• Click **Queues**.<br>• Click **Pending Hotlines**. |
| 2 | On the *Pending Hotlines* page.<br>• Select a hotline by clicking the **Hotline ID**. |
| 3 | On the *Hotline Details* page.<br>• Click the **Transfer/Assign** button. |
| 4 | In the *Transfer/Assign* pop-up window, *Transfer/Assign* section.<br>• Click the **Recipient County*** drop-down arrow.<br>• Select appropriate Recipient County option.<br>**Note:** Having selected a county for the transfer, the Primary Worker field will no longer be an active field.<br>• Enter comments regarding the transfer in the required **Comments*** field.<br>• Click the **Transfer/Assign** button. |
| 5 | In the *Confirmation* pop-up window.<br>• Click the **YES** button.<br>The *Confirmation* pop-up window closes, and the transfer to another county has been successfully initiated.<br>**Note:** Clicking the **No** button will close the *Confirmation* pop-up window and return you to the open *Transfer/Assign* pop-up window without the transfer progressing any further. |
| 6 | In the *Transfer/Assign* pop-up window.<br>• Click the **Done** button.<br>The *Transfer/Assign* pop-up window will close. |

## Assign Primary Worker

| Step | Action |
|---|---|
| 1 | In the *Left Navigation* panel.<br>• Click **Queues**.<br>• Click **Pending Hotlines**. |
| 2 | On the *Pending Hotlines* page.<br>• Select a hotline by clicking the **Hotline ID**. |
| 3 | On the *Hotline Details* page.<br>• Click the **Transfer/Assign** button. |
| 4 | In the *Transfer/Assign* pop-up window, *Transfer/Assign* section.<br>• Click in the **Recipient Primary Worker*** field.<br>• Type the name of the recipient primary worker.<br>**Note:** As you type, name suggestions will display in a drop-down list. If the required recipient primary worker's name displays, you can select it from the list to populate the field.<br>**Note:** Having entered a Recipient Primary Worker to assign, the County field will no longer be an active field.<br>• Enter comments regarding the assignment in the required **Comments*** field.<br>• Click the **Transfer/Assign** button. |
| 5 | In the *Confirmation* pop-up window.<br>• Click the **YES** button.<br>The *Confirmation* pop-up window closes, and the assignment to another primary worker has been successfully initiated.<br>**Note:** Clicking the **No** button will close the *Confirmation* pop-up window and return you to the open *Transfer/Assign* pop-up window without the assignment progressing any further. |
| 6 | In the *Transfer/Assign* pop-up window.<br>• Click the **Done** button.<br>The *Transfer/Assign* pop-up window will close. |

## Assign Secondary Worker

| Step | Action |
| --- | --- |
| 1 | In the *Left Navigation* panel.<br>• Click **Queues**.<br>• Click **Pending Hotlines**. |
| 2 | On the *Pending Hotlines* page.<br>• Select a hotline by clicking the **Hotline ID**. |
| 3 | On the *Hotline Details* page.<br>• Click the **Transfer/Assign** button. |
| 4 | In the *Transfer/Assign* pop-up window, *Secondary Workers* section.<br>• Click **+ Add Secondary Worker.** |
| 5 | In the *Add Secondary Worker* pop-up window.<br>• Click in the **Worker Name*** field.<br>• Type the name of the secondary worker.<br>**Note:** As you type, name suggestions will display in a drop-down list. If the required secondary worker's name displays, you can select it from the list to populate the field.<br>• Click the **Secondary Role*** drop-down arrow.<br>• Select appropriate Secondary Role option.<br>• Click in the **Start Date*** field.<br>• Type the Start Date with a MM/DD/YYYY format or enter the date using the calendar option.<br>• If required, click in the **End Date** field.<br>• Type the End Date with a MM/DD/YYYY format or enter the date using the calendar option.<br>• If active, click the **Admin Group*** drop-down arrow.<br>• Select appropriate Admin Group option.<br>• If active, click the **Unit*** drop-down arrow.<br>• Select appropriate Unit option.<br>**Note:** The **Admin Group*** and **Unit*** fields will be active based on the worker's profile you added.<br>• Enter comments regarding the assignment in the required **Comments*** field.<br>• Click the **Add** button.<br>The *Add Secondary Worker* pop-up window closes, and the Secondary worker displays in the *Secondary Workers* table. |

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|---|---|
| 6 | In the *Transfer/Assign* pop-up window.<br>• Click the **Done** button.<br>The *Transfer/Assign* pop-up window will close.<br>**Note:** To add more Secondary Workers, repeat steps above. |