ENTERING A WORKGROUP

Workgroups are used to establish worker roles for each staff member within a site and a program. Worker Roles will govern what the staff member is responsible for completing in the system.

Why is it important to establish workgroups:

1. Workgroups will establish “who does what” in a client’s record for a program.
2. These workgroups will trigger future workflows automatically.

How to create a workgroup:

1. Navigate to **Agency>Workgroups>Assigned on Site>Information**.
2. In the content pane, click Select a Workgroup.
3. In the pop up window, you will have to search existing workgroups before you can create a new one.
    a. Type in the “%” symbol in the search bar.
    b. Make sure a workgroup for your program does not already exist.
    c. Click the NEW button to create a new work group.
4. Type in a Group Name for your workgroup. Be specific with your naming convention so that you can find this workgroup in the future.
5. Click the Site tab and select your location.
6. Under the heading for Program, click on the ellipses button and select your program.
7. Under the heading for Enrollment, set up each staff member with their designated worker role within your site and program. Be sure to include a start date and to indicate if this will be the “lead staff” in your program.
8. Click Save.