

# How to Search and Assign Activities



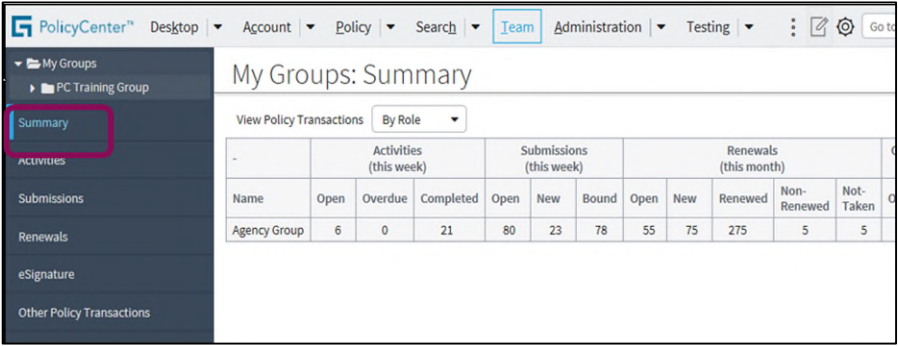
## Description

This job aid describes how to assign activities from the “Team” tab and search and assign activities from the “Search” tab. These processes can only be done by someone with administration credentials in PolicyCenter.

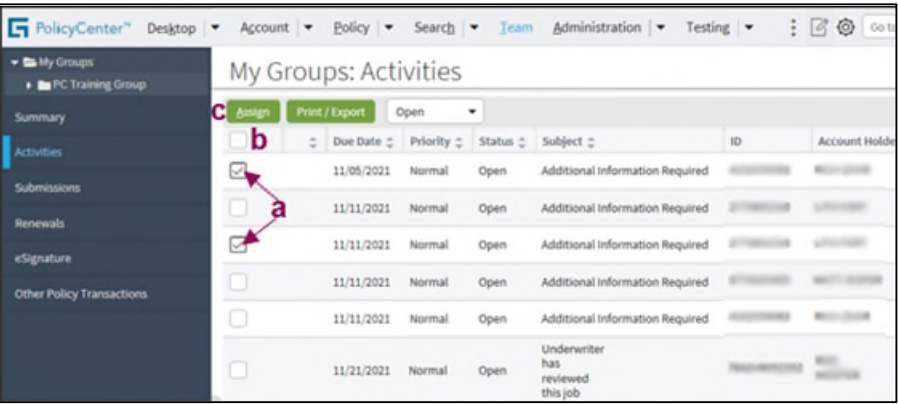
You cannot edit or complete activities from the Team tab; they must be assigned to a user within the agency. If you are the only user managing activities, then all activities must be assigned to you.

## Team Tab

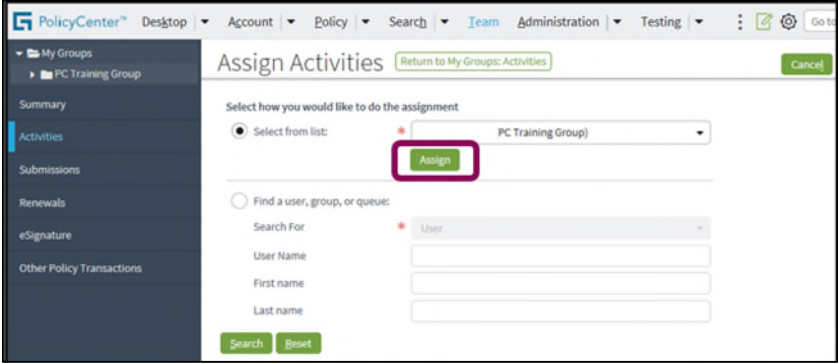
### Step 1

Action	Screen
On the Team tab: <ul style="list-style-type: none"><li>Click the “Activities” link in the left navigation bar to review the activities in your agency.</li></ul>	

### Step 2

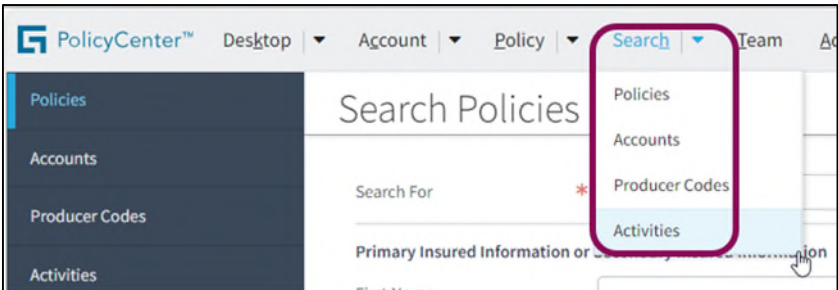
Action	Screen
<p>You can assign a single activity, multiple activities, or all activities to a user via the “My Groups: Activities” screen.</p> <p>Select the checkboxes to the left of the individual activities you want to assign.</p> <p><b>OR:</b></p> <p>Select the checkbox in the column header bar to select all activities for reassignment.</p> <p>Select the “Assign” button.</p>	

## Step 3

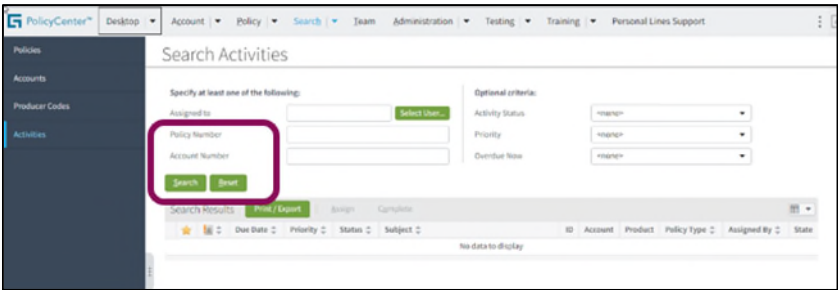
Action	Screen
<p>The “Assign Activities” screen displays.</p> <ul style="list-style-type: none"> <li>You can either select a user from the drop-down list, or search for a user to assign the activities.</li> <li>Select the “Assign” button.</li> </ul> <p>The activities have now been reassigned.</p>	

## Search Tab

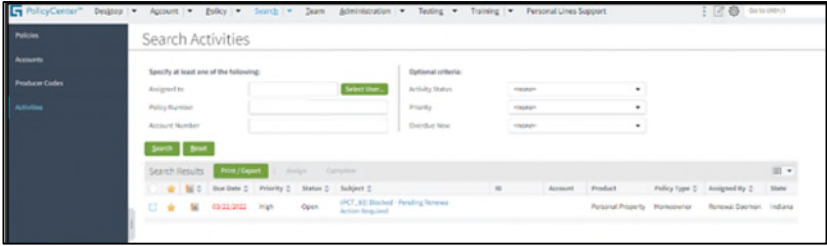
### Step 1

Action	Screen
<ul style="list-style-type: none"> <li>Select the arrow to the right of the “Search tab.</li> <li>Select “Activities” from the drop-down menu.</li> </ul>	

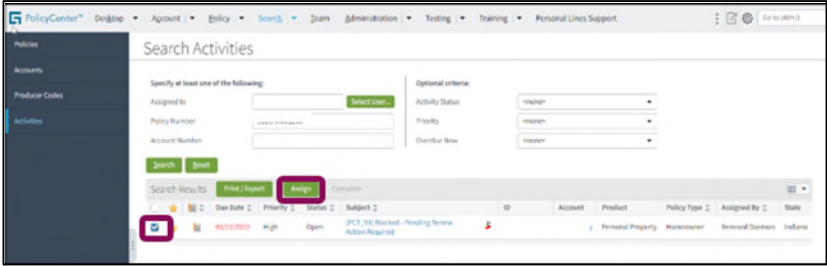
### Step 2

Action	Screen
<ul style="list-style-type: none"> <li>Enter a either a “Policy or Account Number” in the appropriate field.</li> <li>Select the “Search” button.</li> </ul>	

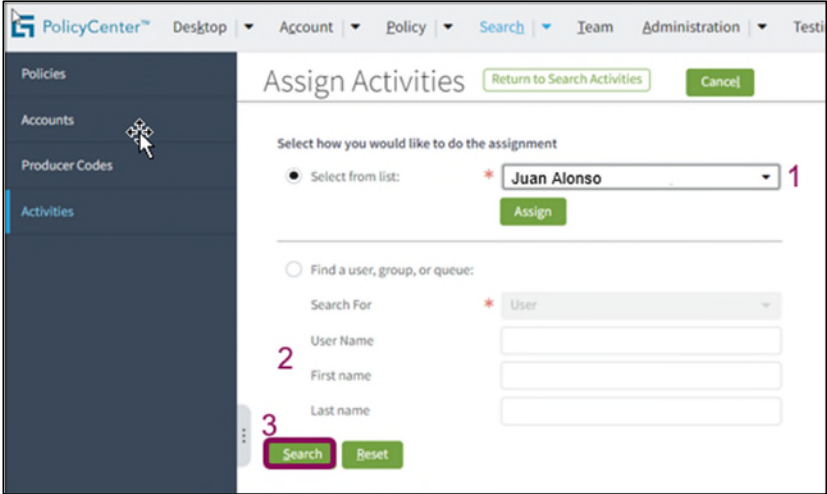
Step 3

Action	Screen
The “Search Results” display.	

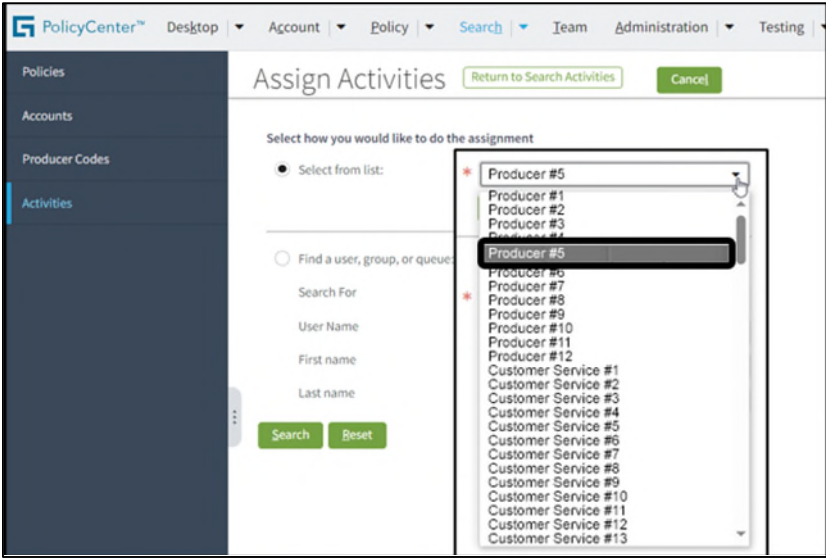
Step 4

Action	Screen
Select the activity to be reassigned from the list and select the “Assign” button.	

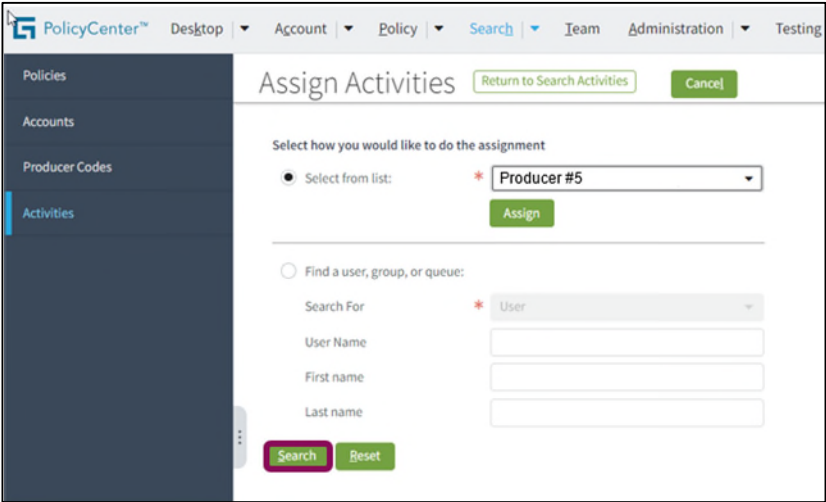
Step 5

Action	Screen
<div>1. Use the drop-down list; or</div> <div>2. Search for the user by “User Name” or “First/Last Name”.</div> <div>3. Select the “Search” button.</div>	

Step 6

Action	Screen
In this example, we select a user from the drop-down list.	

Step 7

Action	Screen
Select the "Assign" button.	

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