

Bulk Case Transfers!

Transferring cases is a simple process within Oregon Benefits Online!

From the Cases tab you click on the Case Bulk Transfer link. The Case Bulk Transfer page is displayed.

The screenshot shows the Oracle Case Bulk Transfer interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. Below this is a navigation bar with 'Cases', 'Contacts', 'Service', and 'Branch Coverage'. The 'Case Bulk Transfer' link is highlighted with a red arrow. The main area is a table with columns: 'New', 'Case Number', 'Case Type', 'Case Status', 'First Name', 'Last Name', 'Priority', 'Case Owner', 'Received Date', 'Date Closed', and 'Master Case'. An orange callout box points to the 'Case Status' column with the text: 'You would query for a particular owner and the cases will display here.' Below the table is a 'Case Transfer' section with a 'Menu' dropdown and a 'Transfer' button, both highlighted with red arrows. Below the 'Transfer' button is a 'Transfer Cases To:' field and a checkbox labeled 'Remove Existing Case Owner(s):' with a red arrow pointing to it. An orange callout box points to this checkbox with the text: 'Once the cases are selected, you will designate the new owner of the case'.

Once you have selected the new owner of the cases, you will check the 'remove existing case owner box' (see red arrow) and hit the transfer button. All the cases will then be assigned to the new owner!