



Manage Organization Assignment Rules		
NBIS Release Version: 4.0	Updated Date: 05/23/2022	File ID: JA-041
Application Section: Organization Management		User Roles: Org Assignment Manager
Applies to Organizations: Adjudication, Appeals, Continuous Vetting, Component Adjudication, Interim, Screening, SSC, FSO, Review, Authorize		
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Related Documents: Assignment Rule Fields (REF-016)		

Purpose: The **Org Assignment Manager** can create and manage Assignment Rules for their organization. Assignment Rules define custom priorities for automatically assigned work within an organization.

Default Priority within NBIS

Assignment rule configurations are optional for an organization but are recommended to appropriately prioritize their case work. By default, NBIS will automatically assign a default priority of 999 to all cases/tasks. Without any assignment rules configured the system will automatically queue the work to be assigned to users as “First in First Out”.

Assignment Rules are always applied to cases to give them capability requirements. Cases are then automatically assigned to a user’s worklist based on the configured Assignment Rules and a user’s defined capabilities, capacities, and thresholds.

Note: Users in the system will automatically receive cases only if they are set to receive work automatically. This applies to the default case priorities as well.

Prioritizing Assignment Rules

Once you add, edit, or delete an Assignment Rule, you need to reprioritize the rules within the system. This allows the system to immediately apply the updates to the cases that are in flight in an Organization’s unassigned workbasket. This will not affect cases already assigned to users.

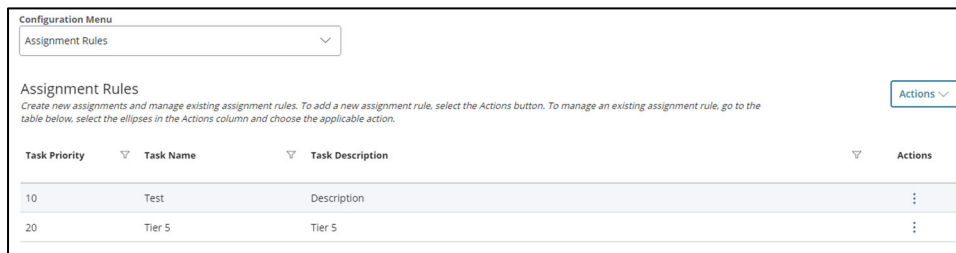
If **reprioritize** is not selected, the system will automatically reprioritize cases overnight to reflect any changes. Reprioritizing does not visually change anything on the assignment rules table, it only impacts the in-flight cases as described above.





Create an Assignment Rule

1. From the left navigation menu, select **Org Management**.
2. Select the **Configuration** tab to view the configuration options.
3. From the Configuration Menu drop-down, select **Assignment Rules**.



Task Priority	Task Name	Task Description	Actions
10	Test	Description	⋮
20	Tier 5	Tier 5	⋮

Figure 1: Org Management Assignment Rules

There are two ways to add a new Assignment Rule:

- From the **Actions** drop-down, select **Add Rule**. This will add the rule to the bottom of the list.
- Under the **Actions** column, select the **ellipses**. You can select **Add Above** or **Add Below** according to the priority of the new rule.

4. Complete all required fields. (See **Reference File-016** for more information about Assignment Rule fields.)

Required Fields:

- a. Select the Phase
- b. Select the Case Type
- c. **(CV Only)** Set the Case Category (if Applicable)
- d. Define the Task Priority
- e. **(CV & ADJ Only)** Select the Workflow Status
- f. Set the Assign To Field

Optional Fields:

- a. Set Move Task Timer
- b. Set Case Duration
- c. Set Program Tags
- d. **(CV Only)** Select CV Priority





Task Category and Priority
The task will be available based on the phase and case type selected in the correlating drop downs below. Additionally, set the task priority for the assignment rule by entering a numerical value.

Phase *

Select...

Case Type *

Select...

Set Task Priority *

30

Task Details
Assign the task to a role. Optionally set the number of days a case can remain in received status and/or, set the number of days the case may remain in the phase.

Assign to *

Select...

Set Move Task Timer

Set Case Duration

Task Attributes
To associate specific criteria related to the assignment rule, optionally include specific program tags, Agency Use Block (AUB) priority level, or AUB coverage codes below.

Program Tag(s)

Select...

Figure 2: Add Assignment Rule

Notes

The system will apply the Assignment Rules in the order of **Task Priority** – the lower the number, the higher the priority. No two assignment rules can be the same. However, multiple assignment rules can have the same task priority value.

The **Set Task Priority** should already be assigned to the rule according to the method by which you added the Assignment Rule.

If you choose **Previous Owner** under **Assign To**, a **Set Assignee Duration** field appears. This field determines how long the task will remain untouched in the previous task owner's workbasket until it is automatically reassigned to another capable user.

Selecting **Any** from the Case Type drop-down allows the system to search for any options when executing the rule.

5. Select **Save and Add**.





View/Edit an Assignment Rule

1. From the left navigation menu, select **Org Management**.
2. Select the **Configuration** tab to view the configuration options.
3. From the Configuration Menu drop-down, select **Assignment Rules**.
4. Under the **Actions** column, select the **ellipses** for the specific rule and then select **View Details**.



View Assignment Rule

View assignment rule details below. To make any changes, select the Edit button at the bottom of the page.

Task Name
Tier 5

Task Description
Tier 5

Task Category and Priority

Phase Review	Case Type Tier 5	Set Task Priority 20
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Task Details

Assign to Any Capable User	Set Move Task Timer _____	Set Case Duration _____
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Task Attributes

Program Tag
_____ ⓘ

[Back](#) [Edit](#)

Figure 3: View Assignment Rule Details

5. Select **Edit**.
6. Make any changes and select **Save** when completed.

Delete an Assignment Rule

1. From the left navigation menu, select **Org Management**.
2. Select the **Configuration** tab to view the configuration options.
3. From the Configuration Menu drop-down, select **Assignment Rules**.
4. In the table of **Assignment Rules**, select the **ellipses** under the **Actions** column.
5. Select **Delete** to remove the desired rule.

