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| 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**.

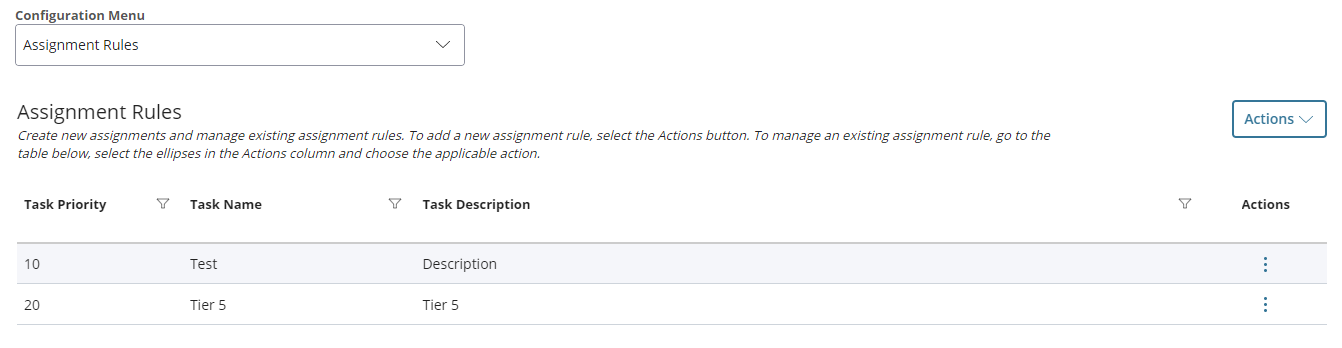


Figure 1: Org Management Assignment Rules

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.

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

**Required Fields:**

* 1. Select the Phase
  2. Select the Case Type
  3. **(CV Only)** Set the Case Category (if Applicable)
  4. Define the Task Priority
  5. **(CV & ADJ Only)** Select the Workflow Status
  6. Set the Assign To Field

**Optional Fields:**

1. Set Move Task Timer
2. Set Case Duration
3. Set Program Tags
4. **(CV Only)** Select CV Priority

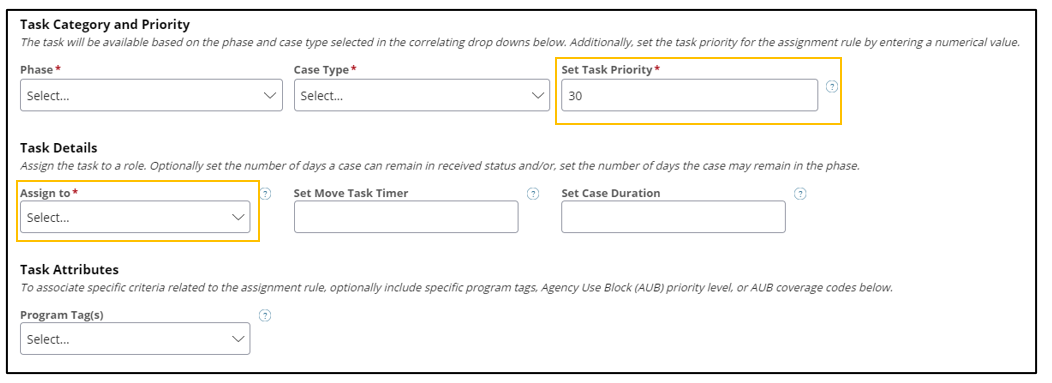


Figure 2: Add Assignment Rule

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| 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. |

1. 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**.

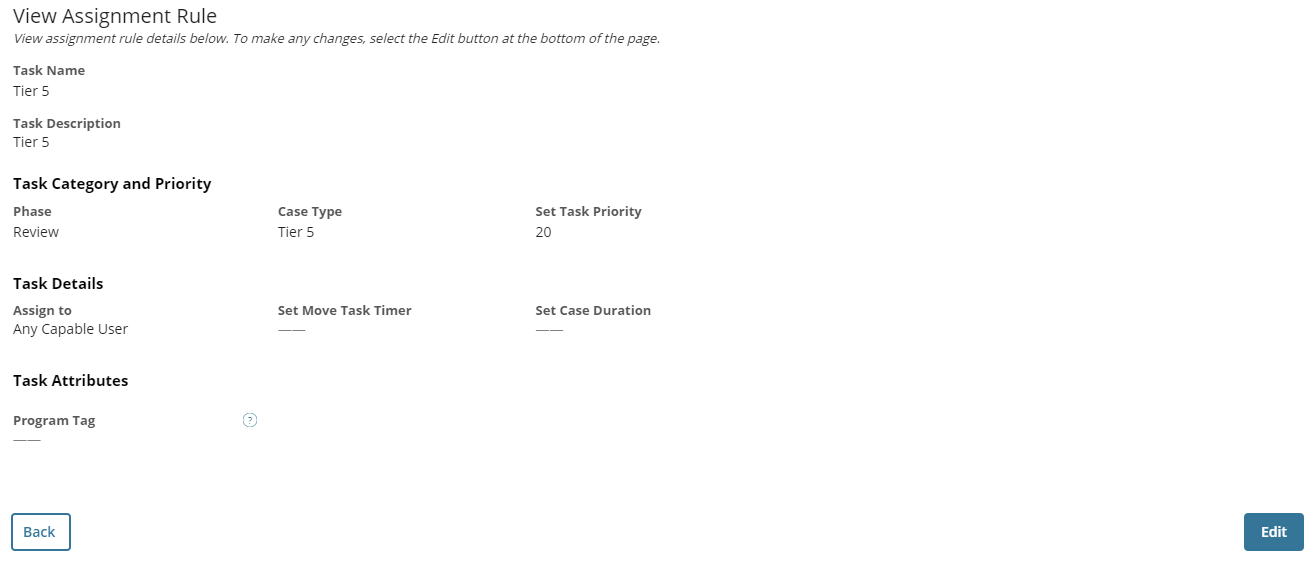


Figure 3: View Assignment Rule Details

1. Select **Edit**.
2. 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.