

Reassign Employees

Prevail 7

From time to time, you may experience employee turnover in your office and need to delete users from your Prevail system. Before you delete any users, though, it is **EXTREMELY** important to reassign their cases, appointments, and tasks to another user. Prevail makes this procedure easy for you to do through the Employee Setup.

1. Click on the Administration dropdown list in the upper left hand corner of Prevail and select "Employee Setup".

2. Select the user to be deleted and click the "Delete" button.

You will now receive a message explaining what you are about to do. **This action can't be undone once completed.*

3. After you review the message, click the "Delete User" button.

4. You will now be at the "Reassign Employee" window. Here you will use the five dropdowns to select who will now be the assigned as the Lead Attorney, Hearing Attorney, Case Manager, Future Appointments and Future Tasks. Once all have been selected, click "Finish" and the user will be removed.