End User Guide: Case Workers

There are three major components associated with your Case Worker profile. These include the profile basics, viewing authorizations and entries. Now let's learn how to use your Case Worker profile and everything it has to offer.

Case Worker Overview

A Case Worker is a profile type in DCI that represents a funding source worker. Users of this type can log into DCI and see a limited subset of information.

Profile Basics

<u>Messaging Module:</u>

Click here for an overview of the Messaging Module.

<u>Help:</u>

Click the 'Help' text to be redirected to our online help center. This searchable database is full of how to videos, guides and references for completing common tasks in DCI.

Viewing Case Worker Authorizations

To view Authorizations associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website
2) Click 'Authorizations' from the side bar. You will see all Authorizations associated with your Caseworker profile
3) Click on the Authorization ID number to view the Authorization Details
    a) Note: this is screen has a lazy load view (more rows appear as you scroll), continue to scroll to view all results
4) This screen displays the Authorization Details, Account Details and any associated Notes or Attachments.

To filter Authorizations associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website
2) Click 'Authorizations' from the side bar. You will see all Authorizations associated with your Caseworker profile
3) You have the ability to filter the Authorizations by start and end date, client name, service code, initial balance, and status. Simply enter the search criteria in the fields then click 'Search'. If you wish to reset the search filters, click 'Reset'

To add a Note to an Authorization associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website
2) Click 'Authorizations' from the side bar. You will see all Authorizations associated with your Caseworker profile
3) Click on the Authorization ID number to view the Authorization Details

    a) Note: this is screen has a lazy load view (more rows appear as you scroll) continue to scroll to view all results
4) This screen displays the Authorization Details, Account Details and any associated Notes or Attachments.
5) Click ‘Actions’ then ‘New Note’
6) Choose the ‘Note Type’ from the dropdown, enter a Subject and Description for the Note.
    a) You can also choose to include an attachment
        i) Click ‘Add Attachment’ and choose the file you wish to upload.
            (1) To remove the attachment, hover over the minus symbol and click on it
            (2) To continue, click ‘Save’ then select ‘Yes’ on the confirmation window

To filter/export Notes linked to an Authorization associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website
2) Click ‘Authorizations’ from the side bar. You will see all Authorizations associated with your Caseworker profile
3) Click on the Authorization ID number to view the Authorization Details
    a) Note: this is screen has a lazy load view (more rows appear as you scroll), continue to scroll to view all results
4) This screen displays the Authorization Details, Account Details and any associated Notes or Attachments.
5) You have the ability to filter the Notes by start and end dates, note type, and subject. Simply enter the search criteria in the fields then click ‘Search’. If you wish to reset the search filters, click ‘Reset’
6) To export your view, simply click ‘Export’ and the file will automatically download to your computer as a CSV file

To add an Attachment to an Authorization associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website
2) Click ‘Authorizations’ from the side bar. You will see all Authorizations associated with your Caseworker profile
3) Click on the Authorization ID number to view the Authorization Details
    a) Note: this is screen has a lazy load view (more rows appear as you scroll), continue to scroll to view all results
4) This screen displays the Authorization Details, Account Details and any associated Notes or Attachments.
5) Click ‘Actions’ then ‘New Attachment’
6) Enter the Attachment name
7) To add an attachment
    a) Click ‘Add Attachment’ and choose the file you wish to upload.
        i) To remove the attachment, hover over the minus symbol and click on it
        ii) To continue, click ‘Save’ then select ‘Yes’ on the confirmation window

To filter/export Attachments linked to an Authorization associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website

2) Click ‘Authorizations’ from the side bar. You will see all Authorizations associated with your Caseworker profile
3) Click on the Authorization ID number to view the Authorization Details
   a) Note: this is screen has a lazy load view (more rows appear as you scroll), continue to scroll to view all results
4) This screen displays the Authorization Details, Account Details and any associated Notes or Attachments.
5) Click ‘Attachments’ beneath Authorization Details and Account Details
6) You have the ability to filter the Attachments by start and end dates, file name, file type and who added the Attachment. Simply enter the search criteria in the fields then click ‘Search’. If you wish to reset the search filters, click ‘Reset’
7) To export your view, simply click ‘Export’ and the file will automatically download to your computer as a CSV file

To download an Attachment linked to an Authorization associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website
2) Click ‘Authorizations’ from the side bar. You will see all Authorizations associated with your Caseworker profile
3) Click on the Authorization ID number to view the Authorization Details
   a) Note: this is screen has a lazy load view (more rows appear as you scroll), continue to scroll to view all results
4) This screen displays the Authorization Details, Account Details and any associated Notes or Attachments.
5) Click ‘Attachments’ beneath Authorization Details and Account Details
6) In the Attachments section of that screen, to the right of Added by, you will see a blue download icon. Click on this icon and the file will automatically download to your computer in the attachments default format.

Viewing Case Worker Entries

To view Entries associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website
2) Click ‘Entries from the side bar. You will see all Entries associated with your Case Worker profile
3) Click on the Entry ID number to view the Entry Details
   a) Note: this is screen has a lazy load view (more rows appear as you scroll), continue to scroll to view all results
4) This screen displays the Punch Details, Account Details/Service Account and any associated Notes or Attachments.

To filter Entries associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website
2) Click ‘Entries’ from the side bar. You will see all Entries associated with your Case Worker profile
3) You have the ability to filter the Entries by start and end date, client name, service code, units, status and account type. Simply enter the search criteria in the fields then click ‘Search’. If you wish to reset the search filters, click ‘Reset’

To add a Note to an Entry associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website
2) Click ‘Entries’ from the side bar. You will see all Entries associated with your Case Worker profile
3) Click on the Authorization ID number to view the Authorization Details
    a) Note: this is screen has a lazy load view (more rows appear as you scroll), continue to scroll to view all results
4) This screen displays the Punch Details, Account Details/Service Account and any associated Notes or Attachments.
5) Click ‘Actions’ then ‘New Note’
6) Choose the ‘Note Type’ from the dropdown, enter a Subject and Description for the Note.
    a) You can also choose to include an attachment
        i) Click ‘Add Attachment’ and choose the file you wish to upload.
            (1) To remove the attachment, hover over the minus symbol and click on it
            (2) To continue, click ‘Save’ then select ‘Yes’ on the confirmation window

To filter/export Notes linked to an Entry associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website
2) Click ‘Entries’ from the side bar. You will see all Entries associated with your Case Worker profile
3) Click on the Punch ID number to view the Punch Details
    a) Note: this is screen has a lazy load view (more rows appear as you scroll), continue to scroll to view all results
4) This screen displays the Punch Details, Account Details/Service Account and any associated Notes or Attachments.
5) You have the ability to filter the Notes by start and end dates, note type, and subject. Simply enter the search criteria in the fields then click ‘Search’. If you wish to reset the search filters, click ‘Reset’
6) To export your view, simply click ‘Export’ and the file will automatically download to your computer as a CSV file

To add an Attachment to an Entry associated with your Case Worker profile:

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2) Click ‘Entries’ from the side bar. You will see all Entries associated with your Case Worker profile
3) Click on the Punch ID number to view the Punch Details
    a) Note: this is screen has a lazy load view (more rows appear as you scroll), continue to scroll to view all results
4) This screen displays the Punch Details, Account Details/Service Account and any associated Notes or Attachments.
5) Click ‘Actions’ then ‘New Attachment’
6) Enter the Attachment name
7) To add an attachment
    a) Click ‘Add Attachment’ and choose the file you wish to upload.
        i) To remove the attachment, hover over the minus symbol and click on it
        ii) To continue, click ‘Save’ then select ‘Yes’ on the confirmation window

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4) This screen displays the Punch Details, Account Details/Service Code and any associated Notes or Attachments.
5) Click 'Attachments' beneath Authorization Details and Account Details
6) You have the ability to filter the Attachments by start and end dates, file name, file type and who added the Attachment. Simply enter the search criteria in the fields then click 'Search'. If you wish to reset the search filters, click 'Reset'
7) To export your view, simply click 'Export' and the file will automatically download to your computer as a CSV file

To download an Attachment linked to an Entry associated with your Case Worker profile:

1) Log in with Case Worker profile via the DCI website
2) Click 'Entries' from the side bar. You will see all Entries associated with your Case Worker profile
3) Click on the Punch ID number to view the Punch Details
   a) Note: this is screen has a lazy load view (more rows appear as you scroll), continue to scroll to view all results
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5) Click 'Attachments' beneath Authorization Details and Account Details
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