ADMIN GUIDE: CASE WORKERS

There are three major components associated with the Case Worker profile. These include creating, editing and linking Case Workers. Now let's learn how to use a 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.

Creating Case Workers

Permissions/Roles Needed to perform the actions below: Case Worker Admin Permission

1) Login to a profile with the appropriate role and/or permission via the DCI website
2) Click 'Case Workers' from the side bar
3) Select 'Actions' then 'Add New Case Worker'
4) Complete all required fields, choosing 'Next' when necessary
   a) Note: Cost Center is required and Funding Source is not
      i) The Funding Source and Cost Center fields can be edited once they have been saved
5) Click 'Save' then select 'Yes' on the confirmation window

Editing Case Workers

Permissions/Roles Needed to perform the actions below: Case Worker Admin Permission

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click 'Case Workers' from the side bar
3. Click anywhere in the row to select a particular Caseworker
4. Select 'Actions' then 'Edit Case Worker'
5. Depending on the information you wish to edit, click 'Basic Demographics' or 'Authentication Information' from the bar underneath the 'Edit Case Worker Details' header
6. Click 'Save' then select 'Yes' on the confirmation window

Linking Case Workers

Permissions/Roles Needed to perform the actions below: Case Worker Admin Permission

To link a Case Worker to a Funding Source:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click 'Case Workers' from the side bar
3. Click anywhere in the row to select a particular Caseworker
4. Select 'Actions' then 'Edit Case Worker'
5. Select the Cost Center you wish to link this Caseworker to from the dropdown
6. The Funding Source field will prepopulate with available options based on the Cost Center that was selected. Choose the Funding Source you wish to link this Caseworker to.
7. Click 'Save' then select 'Yes' on the confirmation window

To unlink a Case Worker to a Funding Source:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click ‘Case Workers’ from the side bar
3. Click anywhere in the row to select a particular Caseworker
4. Select ‘Actions’ then ‘Edit Case Worker’
5. On the Funding Source field, change the dropdown from the currently selected option to ‘Select Funding Source’
6. Click ‘Save’ then select ‘Yes’ on the confirmation window

To link a Case Worker to a different Funding Source:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click ‘Case Workers’ from the side bar
3. Click anywhere in the row to select a particular Caseworker
4. Select ‘Actions’ then ‘Edit Case Worker’
5. Select the Cost Center you wish to link this Caseworker to from the dropdown. (This can remain the same if the new Funding Source is linked to the same Cost Center.)
6. The Funding Source field will prepopulate with available options based on the Cost Center that was selected. Choose the Funding Source you wish to link this Caseworker to.
7. Click ‘Save’ then select ‘Yes’ on the confirmation window

Managing Case Workers

Permissions/Roles Needed to perform the actions below: Case Worker Admin Permission

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click ‘Case Workers’ from the side bar
3. Using the search fields at the top, you can filter the view of Caseworkers by name, cost center, or status. Simply enter your search criteria into one of the fields and click ‘Search’
    1. To reset the information in the search fields, select ‘Reset’
4. Click anywhere in the row to select a particular Caseworker
5. This will open the Case Worker Details screen where you can add notes, attachments and edit a Case Worker. You can also view any existing notes, attachments and events.

To add a Note:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click ‘Case Workers’ from the side bar
3. Click anywhere in the row to select a particular Caseworker
4. This will open the Case Worker Details screen. Click ‘Actions’ then ‘New Note’
5. 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:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click ‘Case Workers’ from the side bar
3. Click anywhere in the row to select a particular Caseworker
4. This will open the Case Worker Details screen. Underneath the Basic Demographics you will view all Notes associated with that Case Worker
5. You have the ability to filter the Notes by start and end dates, note type, subject and who entered the note. 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 view Notes and/or download their Attachments:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click ‘Case Workers’ from the side bar
3. Click anywhere in the row to select a particular Caseworker
4. This will open the Case Worker Details screen. Underneath the Basic Demographics you will view all Notes associated with that Case Worker
5. Click anywhere in the Note row to open the ‘Note Details’ screen
6. You will see Case Worker Details as well as Note Details
7. Note Details will display the Note ID, date, type, who entered it, subject, description and attachments
8. To view the attachment, click the attachment hyperlink on this screen and you will be redirected to the Attachment Details for that particular attachment.
    a. In the Attachment Details section of that screen, to the right of the Name, 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.

To add an Attachment:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click ‘Case Workers’ from the side bar
3. Click anywhere in the row to select a particular Caseworker
4. This will open the Case Worker Details screen. Click ‘Actions’ then ‘New Attachment’
5. Enter the Attachment name
6. 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:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click ‘Case Workers’ from the side bar
3. Click anywhere in the row to select a particular Caseworker
4. This will open the Case Worker Details screen. Underneath the Basic Demographics, click Attachments and you will view all Attachments associated with that Case Worker

5. You have the ability to filter the Attachments by start and end dates, note type, 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'
6. To export your view, simply click 'Export' and the file will automatically download to your computer in the Attachments default format.

To view/download Attachments:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click 'Case Workers' from the side bar
3. Click anywhere in the row to select a particular Caseworker
4. This will open the Case Worker Details screen. Underneath the Basic Demographics, click Attachments and you will view all Attachments associated with that Case Worker
5. Click anywhere in the Note row to open the Attachment Details' screen or to simply download the attachment click on the blue download icon on the far right column
    a. Click on this icon and the file will automatically download to your computer in the attachments default format.
6. You will see Case Worker Details as well as Attachment Details
7. Attachment Details will display the Attachment ID, date, name, file type, file size, note ID, and who added the attachment
8. To view the Attachment, click the Attachment hyperlink on this screen and you will be redirected to the Attachment Details for that particular attachment.
    a. In the Attachment Details section of that screen, to the right of the Name, 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.

To filter/export Events:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click 'Case Workers' from the side bar
3. Click anywhere in the row to select a particular Caseworker
4. This will open the Case Worker Details screen. Underneath the Basic Demographics, click Events and you will view all Events associated with that Case Worker
5. You have the ability to filter the Events by start and end dates, subject and who entered the note. 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
7. If an Event is associated with a Note or Attachment, you will see a hyperlinked ID number that you can click to view the details and download related documents using steps mentioned above.