

**Description:** In this guide, the user will learn how to create, link, edit, and manage Case Worker profiles.

**Roles Required:** Super User

**Permissions Required:** Case Worker Admin

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## Case Worker Overview

In DCI, a case worker is a person who works for the funding source that may need specific access to a client’s account. For HIPAA security purposes, case workers can only see the clients that are linked to their profile. There are three levels of case worker access in DCI. They are linked based on the level of access required:

1. Funding Source - Access to all client accounts associated with the funding source
2. Region –Access to client information for a specific region or regions within the funding source. This gives the case worker access to all data associated with funding accounts that have the region(s) assigned.
3. Funding Account - Access to client information for the linked funding account

## Create Case Worker Profile

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Case Workers** on the submenu



4. Click **Actions**
5. Select **Add New Case Worker** from the drop-down menu
6. Complete the form wizard
  - a. Basic Demographics tab:
    - i. First Name **(required)**
    - ii. Last Name **(required)**
    - iii. Address **(required)**
    - iv. Time Zone – Auto populates based on address
    - v. Phone - **(required)**
    - vi. Alternate Phone (optional)
    - vii. Mobile Number (optional)
    - viii. Email **(required)**
    - ix. Cost Center **(required)**
    - x. Case Worker Access (optional)
      1. Click the drop-down and select the funding source
        - a. This will link the case worker to the funding source
        - b. Only select this option if the case worker needs access to *all client accounts associated with the funding source*
        - c. If the case worker only needs *certain accounts, link via the funding account* (see Link Case Worker Profile to a New Funding Account section)
      2. Optionally, if the funding source has regions, select the region or regions that the case worker should be limited to. This gives the case worker access to all data associated with funding accounts that have the region(s) assigned. Click the X on the region to deselect it.
      3. Click the blue plus sign (+) to add additional funding sources and regions as needed
    - xi. Profile Reference (optional reference field)
    - xii. Can View Notes – Defaults to no. If yes, the case worker can view certain notes linked to clients and punches.
    - xiii. Can View Attachments – Defaults to no. If yes, the case worker can view certain attachments linked to clients and punches.
    - xiv. Click **Next**
  - b. Authentication Information tab:
    - i. Enable Case Worker Login checkbox – Click to enable the ability for a case worker to log in
    - ii. Username - Prepopulates but can be updated
    - iii. Password - Enter a temporary password that the case worker will change at the initial login
    - iv. Confirm Password - Confirm the temporary password

- v. Authentication Status - When the Enable Case Worker Login checkbox is selected, the Authentication Status is set to Active, and the cell is locked.
- vi. Click **Next**
- c. Review Summary tab:
  - i. Review and make any necessary updates
7. Click **Save** to continue and **Yes** to confirm

DCI will send a system-generated email from support@ to the case worker's email address on the profile. The user must click the link to activate the profile, prompting them to enter their temporary password before updating the password and security question.

## Manage Case Worker Profile

### View, Edit, or Deactivate

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Case Workers** on the submenu
4. Search for the case worker by typing the name in the field Type Case Worker Name and selecting it when it populates
5. Click **Search**
6. Select the case worker from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **Edit Case Worker** from the drop-down menu
9. Make the necessary changes on the Edit Case Worker Details page
10. To deactivate the profile:
  - a. Change the status to Inactive on the basic demographics tab
  - b. On the Authentication Status tab, uncheck the Enable Case Worker Login box.
    - i. Select Disabled in the Authentication Status field
  - c. These are important security steps so the case worker will no longer be able to log in and access client information
11. Click **Save** to continue and **Yes** to confirm

### Add Note

Notes added to the case worker profile are not visible to the case worker. Notes entered on a linked client profile may be visible to the case worker if the ability to view notes is set to yes on the case worker profile.

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Case Workers** on the submenu
4. Search for the case worker by typing the name in the field Type Case Worker Name and selecting it when it populates



5. Click **Search**
6. Select the case worker from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Note** from the drop-down menu
9. Complete the form wizard
  - a. Note Type (**required**) – Select Note, Comment, Error, Authentication, or Custom from the drop-down
  - b. Subject (**required**)
  - c. Body (**required**) – Add text
  - d. Attachment (optional)
10. Click **Save** to continue and **Yes** to confirm

## Add Attachment

Attachments added to the case worker profile are not visible to the case worker. Attachments added on a linked client profile may be visible to the case worker if the ability to view notes is set to yes on the case worker profile.

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Case Workers** on the submenu
4. Search for the case worker by typing the name in the field Type Case Worker Name and selecting it when it populates
5. Click **Search**
6. Select the case worker from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Attachment** from the drop-down menu
9. Complete the form wizard
  - a. Name (optional)
  - b. Attachment (**required**) – Click the Choose File button to upload
10. Click **Save** to continue and **Yes** to confirm

## Edit Custom Field Values

This is only applicable to organizations that use custom fields linked to the case worker profile.

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Case Workers** on the submenu
4. Search for the case worker by typing the name in the field Type Case Worker Name and selecting it when it populates
5. Click **Search**
6. Select the case worker from the table by clicking anywhere in the row
7. Click **Actions**



8. Select **Edit Custom Field Values** from the drop-down menu
9. Edit the value(s)
10. Click **Save** to continue and **Yes** to confirm

## Export

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Case Workers** on the submenu
4. Search for the case worker by typing the name in the field Type Case Worker Name and selecting it when it populates
5. Click **Search**
6. Select the case worker from the table by clicking anywhere in the row
7. On the case worker details page, select a tab to export. Options include:
  - a. Notes
  - b. Attachments
  - c. Events
  - d. Custom Fields
8. Click **Export**
9. A CSV file will be generated
10. Click to open and access data in Excel

## Link Case Worker Profile to a Funding Source with or without Regions

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Case Workers** on the submenu
4. Search for the case worker by typing the name in the field Type Case Worker Name and selecting it when it populates
5. Click **Search**
6. Select the case worker from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **Edit Case Worker** from the drop-down menu
  - a. In the Case Worker Access field, select the funding source.
    - i. This will link the case worker to the funding source
    - ii. Only select this option if the case worker needs access to *all client accounts associated with the funding source*
    - iii. If the case worker only needs *certain accounts, link via the funding account* (see Link Case Worker Profile to a New Funding Account section)

- b. Optionally, if the funding source has regions, select the region or regions that the case worker should be limited to. This gives the case worker access to all data associated with funding accounts that have the region(s) assigned. Click the X on the region to deselect it.
  - c. Click the blue plus sign (+) to add additional funding sources and regions as needed
9. Click **Save** to continue and **Yes** to confirm

## Link Case Worker Profile to a New Funding Account

If a case worker only needs access to certain client accounts and not all, the preferred method of linking is by funding account. This can be done when creating the funding account.

1. Log in to DCI with personal profile
2. Click **Authorization** on the main menu
3. Click **Funding Accounts** on the submenu
4. Click **Actions**
5. Select **Add New Funding Account** from the drop-down menu
6. Complete the form wizard as usual but populate the following fields:
  - a. Case Worker - Enter the case worker's name and select it from the drop-down menu. Click the blue **Plus (+)** button to link it to the funding account.
    - i. Repeat to add additional case workers
7. Click **Save** to continue and **Yes** to confirm

## Link Case Worker Profile to an Existing Funding Account

A case worker can be linked to an existing funding account by editing it.

1. Log in to DCI with personal profile
2. Click **Authorization** on the main menu
3. Click **Funding Accounts** on the submenu
4. Search for the funding account using the filters
5. Click **Search**
6. Select the funding account from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **Edit Account** from the drop-down menu
9. Populate the following field:
  - a. Case Worker - Enter the case worker's name and select it from the drop-down menu. Click the blue **Plus (+)** button to link it to the funding account.
    - i. Repeat to add additional case workers
10. Click **Save** to continue and **Yes** to confirm