

Admin Guide - Case Workers

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



- [Case Worker Overview](#)
- [Create Case Worker Profile](#)
- [Manage Case Worker Profile](#)
 - [View, Edit, or Deactivate](#)
 - [Add Note](#)
 - [Add Attachment](#)
 - [Edit Custom Field Values](#)
 - [Export](#)
- [Link Case Worker Profile to a Funding Source](#)
- [Link Case Worker Profile to a New Funding Account](#)
- [Link Case Worker Profile to an Existing Funding Account](#)

[Related articles](#)

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 two types of case workers in DCI. They are linked based on the level of access required:

1. Funding Source Case Worker - An employee at the funding source who requires access to all client accounts associated with the funding source
2. Funding Account Case Worker - An employee at the funding source who requires 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. Funding Source (optional) - Click the drop-down and select the funding source. Click the blue **Plus (+)** button to add the funding source.
 1. This will link the case worker to the funding source
 2. Only select this option if the case worker needs access to *all client accounts associated with the funding source*
 - a. If the Case Worker only needs *certain accounts*, link via *the funding account* (see Link Case Worker Profile to a New Funding Account section)
 - 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 (the sender's email address is: support@dcisoftware.com) to the case worker's email address on the profile. This email must be validated by the case worker to access the system.

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

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. Click the Funding Source field drop-down and select the funding source. Click the blue **Plus (+)** button to add 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*
 1. If the Case Worker only needs *certain accounts, link via the funding account* (see Link Case Worker Profile to a New Funding Account section)
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

Related articles

- [Reports Guide](#)
- [Authorizations Widget](#)
- [Authorizations - Overview](#)
- [Case Workers Guide](#)
- [October 2023 Release Notes](#)