Case Workers Guide

Description: In this guide, the user will learn how to navigate DCI as a case worker.

Roles Required: Case Worker

Permissions Required: N/A

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Profile Overview

The case worker profile allows users to review pertinent information in a view-only format. Review information about authorizations and time entries of clients and run reports.

Profile Activation

After the case worker profile has been created, DCI will send a system-generated email (sender email address is: support@dcisoftware.com) to the case worker email address on the profile. This email must be validated by the case worker to access the system.

1. Select the **Activate Your Profile** button in the email
    a. Please note: The Activate Your Profile or Reset Password button link will only be active for a specific amount of time (typically 24 hours) determined by the organization.
    b. After clicking the Activate Your Profile button in the email, an alert stating "Invalid Token. Please contact your DCI administrator" will appear if the link is inactive. Select the **Resend the email** button and try again.
2. The Authenticate Password page will open. Enter the **temporary password** provided by the organization and click **Authenticate**.
3. The Update Password page will open. Enter a **new password** then confirm it and click **Update Password**. Password criteria are determined by the organization, but typically must be:
    a. At least ten characters
    b. Contain one uppercase and one lowercase letter, number, and special character.
    c. Do *not* contain more than two repeated characters in a row
    d. Different from the three previous passwords
4. Select **Yes** to confirm the password update
5. The DCI profile login page will open. Enter **username and password** and click **Sign In**.
6. The update security details page will open
    a. Select a security question, type an answer, and click **Save**.
        i. The security question and answer will be used as verification if the user selects the Forgot Password link to reset the profile password

ii. Security questions are case sensitive
7. The user is now logged in to the case worker profile and taken to the dashboard, or landing page.

Verify Mobile

Verifying a mobile number in DCI allows the user to receive SMS text notifications. If the mobile number is not verified,the notifications will be sentviaorwill beavailable for viewing in the DCI messaging center.

1. Log in toDCI
2. Clicktheusernamein theupper right-hand cornerof the page which is indicated with a person icon
3. Select **Settings**onthe drop-downmenu
4. Click**Verify Mobile**on the submenu
5. **Enter mobile number**and clickUpdate Mobile Number
6. Agreen bannerstating "Your Mobile Number is updated. Please verify mobile number"will appear
7. Click **Send Verification Code**
8. A green bannerstating "Your Verification Code is sent. Please check your registered Mobile Number" will appear.
9. The userwill receive a verification code viaSMS text message. Enter the verification code into the**Verification Code**field.
10. Click **Verify Mobile**

Themobile number is now verified and will receive SMS text message notifications.

Dashboard

Main Menu

The top portion of the dashboard is called the main menu. From left to right it features:

- Company logo - Click to return to the dashboard
- Home - Click to return to the dashboard
- Care Management (Instance-Level Setting) – Some organizations may use the care management module which includes client overview and summary, care notes, and plan of care information. See the Care Management section of the guide for details.
- Reports - Access and run reports. See the Reports section of the guide for details.
- Envelope Icon - Access the messaging module to view and send messages
- Help - Access the help center and search for articles by keyword or topic
- Username - Displays the username of the user who is logged in to DCI
- Settings – Indicated by the person icon. Click to update user settings including password, security question, email, or username. Also, click to log out of DCI.

Submenu

The left portion of the dashboard is referred to as the submenu. From top to bottom it features:

- Dashboard - Click to return to the dashboard. Includes the Authorizations Widget and News Posts.
- Clients - Click to view client information such as basic demographics, associated entries and employees, authorizations, and diagnosis.

Authorizations

The authorization widget provides current information about a client's authorization(s) in a read-only view.

1. Enter the client name in the Type Client Name field and select it when it populates
    a. Optionally, also enter the Date of Service to narrow the search results.
2. Click **Search** to display the client's authorization information
    a. Service Code – Service the client is eligible to receive. A client may have multiple service codes.
    b. Start Date – Day the authorization starts
    c. End Date – Day the authorization ends
    d. Initial Balance – Total amount of authorized units or dollars
    e. Remaining Balance – Amount deducted from the authorization after pre-authorization holds have been processed for billing and payment
    f. Pre Authorization Holds – Amount deducted from the authorization that has not yet been processed for billing and payment
    g. Current Available Balance – Total of the remaining balance minus any pre-authorization holds
    h. Monthly Max – Maximum units or dollars available for the authorization per service per client per month
    i. Weekly Max – Maximum units or dollars available for the authorization per service per client per week
    j. Daily Max – Maximum units or dollars available for the authorization per service per client per day
3. Click **Display as Time** to view the authorization data in time instead of units. Once clicked, the button changes to **Display as Units.**

    - Authorizations measured in miles and dollars are excluded from time conversion. If minutes are in a decimal, the system will always round down to the whole minute.
4. Click **Reset** to exit the client's authorization
5. Repeat the process for additional clients

News Posts

1. After logging into the mobile app, web portal, or mobile web, you may see one or more news posts, which display important information from the organization or program on a splash screen. Click **OK** to acknowledge the content on each.
2. Additionally, view news posts by scrolling down on the dashboard.
3. Click on a news post to open the details page

Clients

The Clients tab on the submenu provides a list of the case worker's clients. To access client information:

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Search for the client by typing the name in the field Type Client Name and selecting it when it populates
5. Click **Search**
6. Select the client from the table by clicking anywhere in the row
   a. View the Basic Demographics and Other Details widgets
   b. Scroll down and click the tabs to view:
      i. Entries – Entries associated with the client. Click the **Load More** button to view all entries.
         1. Export entries to a CSV file by clicking the **Export** button. Click to open and access data in Excel.
         2. Click the hyperlinked ID number to view the punch detail page
         3. View the widgets contained on the Punch Detail page for additional information - Punch Details, Account Details /Service Account, Client Details, Account Details/Funding Account, EVV Details, Reason Codes, and Statements.
         4. Click the tabs to access additional punch information:
            a. Notes - View employee notes on the punch, reason codes, reason code notes, and statements/tasks.
            b. Attachments - View employee attachments on the punch
            c. Events - Log including date/time, subject, description, input type (web portal or mobile app), OS, OS version, app version, and user/system process for all punch activity including EVV method captured, updates, edits, system processes, approvals, rejections, and view.
            d. Verifications - EVV verification data for the punch along with the status of the verification (some require approval)
            e. Map - Visual location of the mobile app punch
      ii. Authorizations – Alternate way to view authorizations for the client. Click the **Load More** button to view all authorizations.
         1. Export authorizations to a CSV file by clicking the **Export** button. Click to open and access data in Excel.
         2. Select an authorization to view the authorization detail page
         3. View the widgets contained on the Authorization Detail page for additional information - Authorization Details, and Account Details (Auth).
         4. Click the tabs to access additional authorization information:
            a. Entries - View all entries associated with the authorization. Click the hyperlinked ID number to view entry details.
            b. Rate Changes - History of all bill rate changes on the authorization
            c. Notes - View notes created on the authorization
            d. Attachments - View attachments pertaining to the authorization
            e. Events - Log including date/time, subject, description, input type (web portal or mobile app), OS, OS version, app version, and user/system process for all authorization activity including updates, edits, system processes, approvals, rejections, and views.
      iii. Employees – View employees associated with the client. Please note: Clicking on the employee line does not open the employee details. However, employers do have access to employee details.
         1. Export employees to a CSV file by clicking the **Export** button. Click to open and access data in Excel.
      iv. Notes (super user must grant access) – View notes regarding the client
      v. Attachments (super user must grant access) – View attachments pertaining to the client
      vi. Diagnosis – View client diagnosis information

Reports

Available Reports

- Summary Report - The default and most popular report for case workers which provides authorization and utilization information
- Care Management Reports
  - Task Result Details Report - Lists all task results
  - Raw Data Dump Report - Allows users to export all Care Management data per client
- Notes Report
  - Punch Entry Notes and Canned Statements Report - Hover over the Notes Report submenu tab to view and select the Punch Entry Notes and Canned Statements Report to view notes and tasks for each punch entry
- Authorization Run Rate Report - Shows actual versus projected budget usage
- Punch Entry Details Report - View all punch entries for associated clients based on selected filters. Report column options include who created the punch, status, date of service, start and end times, and service code.

Run a Report

1. Log in to DCI with personal profile
2. Click **Reports** on the main menu
3. Hover over any of the submenu tabs to view associated reports on the flyout menu
4. Select a report
   a. The Summary Report is the default and most popular report for case workers. It provides authorization and utilization information to help case workers manage their caseload.
5. Enter desired criteria into the filters
   a. Filter options vary by report
6. Click **Search**
7. The records will display in the table below the filters

Download a Report

1. Follow the steps to run a report
2. Click **Download** to open the download report wizard
   a. Columns tab:
      i. Select all desired columns in Available Columns to download
      ii. Click the **> single right arrow** to add to Selected Columns
      iii. Alternatively, click the **>> double right arrows** to add all Available Columns to Selected Columns.
      iv. Click the **< single left arrow** to remove the column from the Selected Columns
      v. Alternatively, click the **<< double left arrows** to remove all columns from the Selected Columns.
      vi. Reorder selected column items by dragging and dropping into the preferred order
      vii. Click **Next**
   b. Options tab:
      i. Click the Format field drop-down to choose the download file format. Choices include Excel, PDF, CSV, and Tab Delimited.
         1. PDFs have a 10-column limitation for report downloads
         2. The Summary Report download is preformatted as a PDF
         3. Excel is the recommended format for the Punch Entry Details Report
      ii. If PDF is selected, the Orientation field will become available. Select Portrait or Landscape.
      iii. Save as Report Download Preference box – If checked, DCI will save the format and orientation preferences for subsequent downloads.
   c. Click the blue **Download** button
   d. Click the blue **Yes** button to confirm
3. Click the downloaded file to open (located in the Downloads folder)
4. Enable editing and use data as needed

Message Center

DCI offers the opportunity for case workers to interact with other, linked users through the secure message center, and receive automated system notifications.

View and Manage Messages

1. Log in to DCI with personal profile
2. Click the **mail icon** in the top right of the main menu
3. Select **See All Messages** to open the inbox
   a. Use filters to search for a specific message
   b. View messages in the table below the filters
   c. Messages in bold are unread
   d. A yellow star indicates a high-priority message
4. Click anywhere in the message row to open and view message details
   a. From (sender)
   b. To (recipient)
      i. Recipient name will be highlighted in red if the message is unread
      ii. Recipient name will be highlighted in green if the message has been read
   c. Priority level
   d. Date sent
   e. Message body
   f. View notes or attachments by clicking on the respective tab
5. Click **Actions** to view options
   a. Reply – Option not visible for system notification emails
   b. New Note
   c. New Attachment
   d. Archive
   e. Delete
   f. New Message
6. In a message strand, select the single message to expand the section and display the message details.

Send a Message

1. Log in to DCI with personal profile
2. Click the **mail icon** in the top right of the main menu
3. Select **See All Messages**
4. Click **Actions**
5. Select **New Message** from the drop-down menu
6. Complete the form wizard
   a. To **(required)** – Type recipient(s) name
      i. Case workers can only send messages to linked users. If the recipient's name does not populate upon typing, a message cannot be sent to that user.
   b. Subject **(required)**
   c. Priority **(required)** – Select low, normal, or high. High-priority messages display on the dashboard with a red banner.
   d. Message body (optional)
7. Click **Save as Draft** to save and send it later
   a. View the draft by selecting Draft on the submenu
8. Click **Cancel** to delete the message
9. Click **Send** to send the message
   a. View sent items by selecting Sent on the submenu

Care Management (Instance-Level Setting)

Description: The care management module is designed to track the individual support plan of a client. Individual support plan (ISP) is defined as documentation of the activities, resources, and supports that an individual, personal agent or service coordinator, and other designated caregivers, agree are important to or for achieving and maintaining personal outcomes. The ISP is referred to as a plan of care in DCI and is specific to the individual receiving care. The plan of care tracks individual goals.

*Please note: Care management is an instance-level setting and must be enabled by a DCI representative. If care management is enabled, the Care Management tab will be visible on the main menu.

Overview

1. Log in to DCI with personal profile
2. Click **Care Management** on the main menu
3. Click **Overview** on the submenu
4. Search for the client or employee by typing the name in the filter and selecting it when it populates
5. Click **Search**
6. The results table displays the client name, number of goals, number of goals meeting targets, date the plan of care was created, date of last care note, number of active employees, and status.
7. Select from the results table by clicking anywhere in the row
8. On the Care Management Overview Detail page:
    a. View the Trends widget by selecting a tab
        i. Task Outcomes Over Time
        ii. Task Submissions By Task
        iii. Use the radio buttons to change the days displayed in the Trends widget
            1. Options include All, 90 days, 30 days, 14 days, or 7 days.
    b. Plan of Care widget
        i. Provides goal details including Goal Name, Number of Tasks, Outcome, Target Outcome, Last Tracked, Effective Date, End Date, Status, and Added By.
        ii. Select the goal by clicking anywhere in the row to open and view the details
    c. Select an available tab - Care Notes, Task Results, Notes, Attachments, or Events.
        i. Please note: Not all tabs may be visible
        ii. Select an entry in the table to view the details page

Care Notes

1. Log in to DCI with personal profile
2. Click **Care Management** on themain menu
3. Click **Care Notes** on the submenu
4. Use the filters to search for a care note
    a. Update the Status filter to Select Status to view all care notes
5. Click **Search**
6. The results table displays the care notes ID, entry ID, service date, due date, client, employee, published date (if the care note is in published status), and status.
    a. Overdue care notes show in red in the due date column
7. Click anywhere on a row to open and view the care note details
    a. View task results on the shift within goal tracking in the plan of care widget
    b. View notes and attachments

Plan of Care

1. Log in to DCI with personal profile
2. Click **Care Management** on themain menu
3. Click **Plan of Care** on the submenu
4. Use the filters to search for a plan of care
5. Click **Search**
6. The results table displays the client's full name, ID, the effective date of the plan of care, end date, number of active goals, cost center, and status.
7. Click anywhere on a row to open and view details
    a. Basic Demographics widget – View client details
    b. Current Assessment widget – Details the plan of care
    c. Tabs – View Goals, Custom Fields, Assessments
        i. Export information to a CSV file by clicking the Export button on any tab
        ii. Click to open and access data in Excel

Client Summary

1. Log in to DCI with personal profile
2. Click **Care Management** on themain menu
3. Click **Client Summary** on the submenu to view clients with care management enabled
4. Use the filters to search for a client
5. Click **Search**
6. The results table displays the client ID, name, state, region (if applicable), cost center, and status.
7. Click anywhere on a row to open and view details
    a. Client Details widget – View client details
    b. Tabs – View Diagnosis, Plan of Care
        i. Export information to a CSV file by clicking the Export button on any tab
        ii. Click to open and access data in Excel

Related articles

- Reports Guide
- Authorizations Widget
- Authorizations - Overview
- Case Workers Guide
- October 2023 Release Notes