



DOCUMENTS AND CHECKLISTS– VIDEO COMPANION GUIDE

CaseWorthy Training & Documentation

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Video Companion Guide Overview

The purpose of this Video Companion Guide is to assist Users in their understanding of the material which is covered in the Video Resource Guides for System Administrators. This is NOT a standalone Guide.

This guide is largely the script which was created for the video. Please know that the examples used in the guide are *parallel* to those in the video, but the process is the same. *For example*, the video might show Cynthia Brown receiving a service while the guide shows screenshots for Claire Davis. The recording of the service for Claire will follow the same procedure as Cynthia.

Each guide correlates with an entire video series. Each section of the guide corresponds with an individual video in the series.

This guide may be used:

- while watching the videos
- for reference while taking the class independently
- for reference after the implementation process
- as a reference when documenting custom configuration

As CaseWorthy is continually growing and expanding, the Video Companion Guides for System Administrators will be updated to show changes before the videos. Information, which is not included in the video, but is current in the CaseWorthy application will appear similar to the text below:



UPDATE: Text that follows this icon will be updates to the material that are not yet available in video format.

Documents and Checklists

The CaseWorthy *Documents and Checklists* video series includes information about the following topics:

- Document Type Setup
- Checklist Items Setup
- *Documents and Checklists* Dashboard

This first video in the *Documents and Checklists* series details document type setup and associating documents with other entities other than a Client.

Document Management

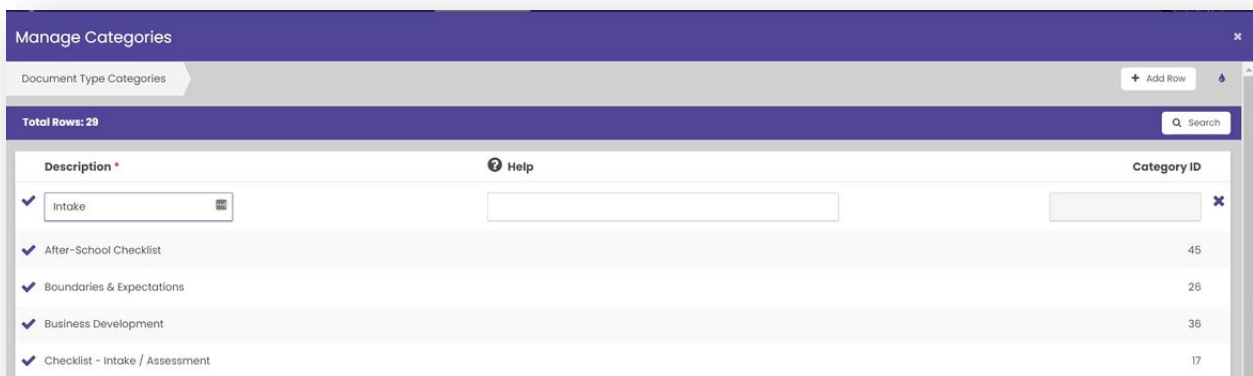
Document Management functionality allows for the tracking of items saved in physical files as well as the ability to scan and upload any electronic documents into the system.

Documents are mainly associated to Client records but can be linked to other entity types as well, such as an Organization, Provider, User, and also Program.

Document functionality includes the ability to categorize types of documents.

This is done on the Administration tab, within Codes and Categories, and

Document Types.



The screenshot displays the 'Manage Categories' interface. At the top, there's a header 'Manage Categories' with a close button. Below it, a sub-header 'Document Type Categories' is visible, along with an 'Add Row' button and a search icon. A status bar indicates 'Total Rows: 29' and a search input field. The main table has three columns: 'Description', 'Help', and 'Category ID'. The first row is 'Intake' with a checkmark and a category ID of 45. Subsequent rows include 'After-School Checklist' (ID 26), 'Boundaries & Expectations' (ID 36), 'Business Development' (ID 17), and 'Checklist - Intake / Assessment'.

Description *	Help	Category ID
✓ Intake		45
✓ After-School Checklist		26
✓ Boundaries & Expectations		36
✓ Business Development		17
✓ Checklist - Intake / Assessment		

Here, document types can be created to describe what your agency wants to collect, view, and store.

Document Categories

Further, document categories are used to group document types and are created and managed within MANAGE CATEGORIES. While your database doesn't include baseline document types, some document categories are included.

Select ADD ROW to create a new category.

Document type categories can be something as simple and broad as 'Client' or something more specific such as 'Intake'. Or it might be associated to functionality like 'Foster Care'.

'Checklist Item' is a category of documents which work with the Checklist functionality which will be covered in the next video.

The **Help** field may be used to provide further insight into the category.

Add as many categories as needed and SAVE the form.

Document Types

For the purposes of this video, most of the Intake Document Types have already been setup.

To create a new Document Type, click ADD ROW.

The screenshot displays the 'Document Types' management interface. At the top, there are tabs for 'Manage Categories' and 'Add Row'. Below the tabs, there is a 'Filters' section with a 'Description Type' search box and a 'Category Search' dropdown menu. The main table lists document types with columns for 'Type', 'Sort Order', 'Category', 'Doc Type ID', and 'Organizations'. The 'Health History Survey' row is highlighted, showing it is categorized under 'Intake' and associated with 'A Place for Change Alliance for Community Trust'. Other rows include 'Social Security Card', 'Driver License', and 'Address Verification'.

Type	Sort Order	Category	Doc Type ID	Organizations
Health History Survey		Intake		A Place for Change Alliance for Community Trust
Social Security Card	1	Some	365	All
Driver License	2	Some	1000000001	Some
Address Verification	3	Some	1000000003	Some

Enter a description of the document **Type** for Users to easily identify what document to use.

Sort Order controls the order in which the options display in a dropdown list field.

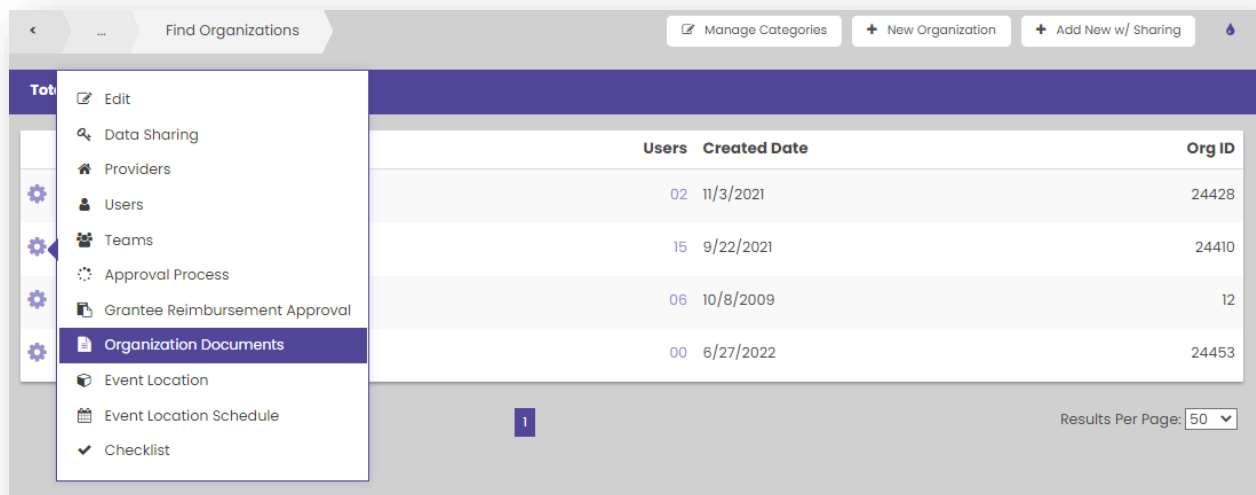
Categories are used to filter document types in searches.

The **Organizations** field determines which Organization's Users will have access to this document category. 'All', 'Some', or 'No Organizations' may be selected.

Once all document types have been added, SAVE the form.

As previously mentioned, documents are most often associated with Clients, but may also be stored for programs, Providers, Users, and Organizations.

Associating a document to a Provider, User, or Organization is done using the **Documents** option on the specific entity's action gear.



Associating a document to a program differs, in that the item becomes part of a Program Checklist. This functionality is addressed in the next video in the series, [Checklist Functionality](#).

Checklist Functionality

This second video in the *Documents and Checklists* series details setup for Checklist functionality.

Program Checklists

Program Checklists can be created to assist in ensuring required items are collected during a process for the specific program at intake or for certain steps of an approval process. Checklists are not always a list of documents but can include documents.

Checklist Items

While Checklist items are simply a document type, they can also be managed separately within **Checklist Items** in Codes & Categories.

Type *	Category ID *	Doc Type ID
✓ Income Verification	Choose Options... Checklist Items	

Checklist Items	
✓ Address Verification	1000000003
✓ Driver License	1000000001

All records on this form have the 'Checklist Items' category. When ADD ROW is used, creating new Checklist Items is done easily as the Category is already selected. Additional categories can be selected as well.

MANAGE CATEGORIES is the same form accessed from the **Document Types** menu item.

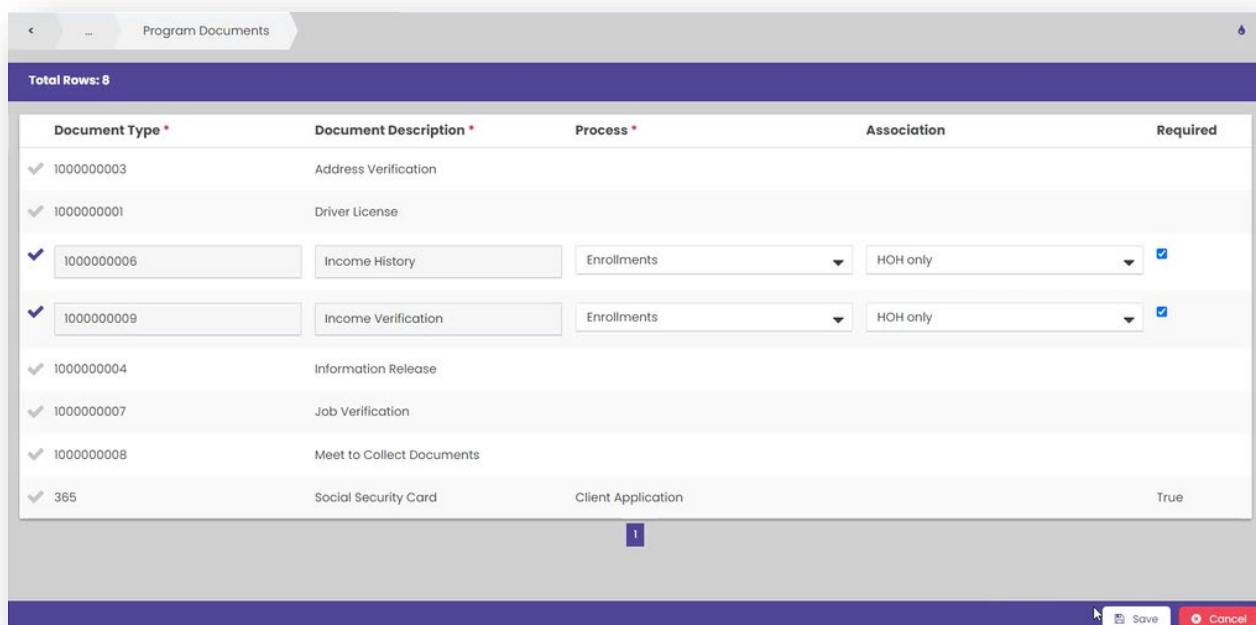
Checklist Items may be something that is not document related.

All of these items can be mapped to a program.

Program to Checklist Mapping

Next, we'll need to link the Checklist Items to the program by navigating to Programs and Accounts and selecting **Checklists** from the Program's action gear.

Select ADD NEW.



The screenshot shows a web application interface titled "Program Documents". At the top, it indicates "Total Rows: 8". Below this is a table with the following columns: "Document Type", "Document Description", "Process", "Association", and "Required".

Document Type *	Document Description *	Process *	Association	Required
✓ 1000000003	Address Verification			
✓ 1000000001	Driver License			
✓ 1000000006	Income History	Enrollments	HOH only	<input checked="" type="checkbox"/>
✓ 1000000009	Income Verification	Enrollments	HOH only	<input checked="" type="checkbox"/>
✓ 1000000004	Information Release			
✓ 1000000007	Job Verification			
✓ 1000000008	Meet to Collect Documents			
✓ 365	Social Security Card	Client Application		True

At the bottom right of the interface, there are "Save" and "Cancel" buttons.

All Checklist Items appear. Select the checkbox next to all appropriate items that should be associated to the program.

Select a **Process** for each item. These two items are collected at the time of enrollments into the program.

Association is used to indicate who the item is collected for, the head of household or all enrollment members.

Lastly, click the checkbox if the item is **Required** to be collected for the program process.

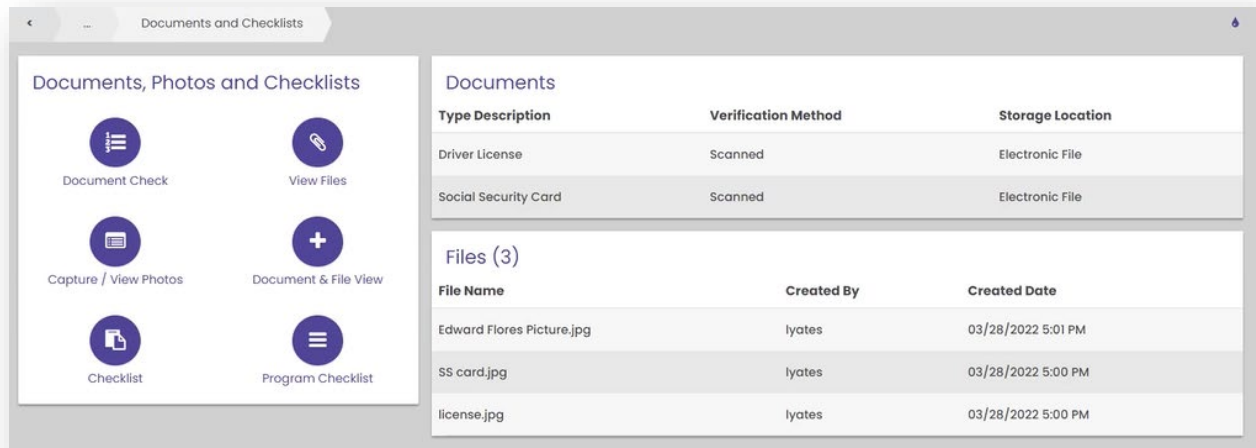
Repeat the process for all items that must be associated with a program.

The next video in the series explores the [*Documents and Checklists Dashboard*](#) on the Case Management tab.

Documents and Checklists Dashboard

In this third video of the series, we'll discuss the functionality available on the *Documents and Checklists* dashboard.

This dashboard is located on the Case Management tab, Case Management, and Documents and Checklists.



Query Widgets

The *Documents* query widget displays the Client's 10 most recently recorded documents. The query links to the *Document Check* summary form where all Client documents are managed.

The *Files* query widget displays the Client's 10 most recently uploaded electronic files. The query links to the *View Client Files* summary form where all uploaded files are managed.

Menu Links

Document Check

Document Check allows a document to be recorded on the Client's record. The summary form displays all existing documents for the Client.

The screenshot shows a web application titled "Document Check". At the top, there is a "Filters" section with a "Verification Method" dropdown menu. Below this, a purple bar indicates "Total Rows: 2". A search bar is located on the right. The main table has the following columns: Created Date, Storage Location, Document Type, Verification Method, Expiration Date, View File, Case Note, and File ID. Two rows of data are displayed, each with a gear icon in the first column and a "View File" button in the sixth column. The second row also has a magnifying glass icon in the seventh column. At the bottom right, it says "Results Per Page: 50".

Created Date	Storage Location	Document Type	Verification Method	Expiration Date	View File	Case Note	File ID
3/28/2022	Electronic File	Driver License	Scanned				6230
3/27/2022	Electronic File	Social Security Card	Scanned				6231

Access a digital version of the document by clicking VIEW FILE. Click the magnifying glass button to view the attached Case Note.

To associate a document with the Client, select ADD NEW.

The screenshot shows the "ADD NEW" form. It has a header with fields for Document Type, Default Verification Method, Storage Location, Upload File, Created Date, and Expiration Date. Below the header, there are several document types listed with checkboxes: Social Security Card, Driver License, Address Verification, Information Release (checked), and Health History Survey. The "Information Release" row is expanded, showing a "Scanned" verification method, "Electronic File" storage location, and a file named "Signed Release of Information.pdf" with a "Browse" button. Below this, there is an "Attach Scanned Document" button. Further down, there is a "Case Note" section with a "Case Note" button and a "Restriction" dropdown menu set to "Shared". At the bottom right, there are "Save" and "Cancel" buttons.

Select the check mark next to the appropriate document type to expand the row.

Use the **Default Verification Method** dropdown to select the state of the document.

Select a **Storage Location**. If the document will not be uploaded into CaseWorthy, select 'Paper File'.

Next, select BROWSE to find an already existing digital file. There is no limitation to the file type. Once the file is selected, click OPEN. The file name should appear in the field.

Use ATTACH SCANNED DOCUMENT if you wish to scan the document using the CaseWorthy Desktop application.

The **Created Date** defaults to the current date. Enter an **Expiration Date** if the document is only valid until a certain date.

Lastly, enter a CASE NOTE if desired.

Set the appropriate **Restriction** for the document which determines if this document will adhere to Organization level data sharing rules.

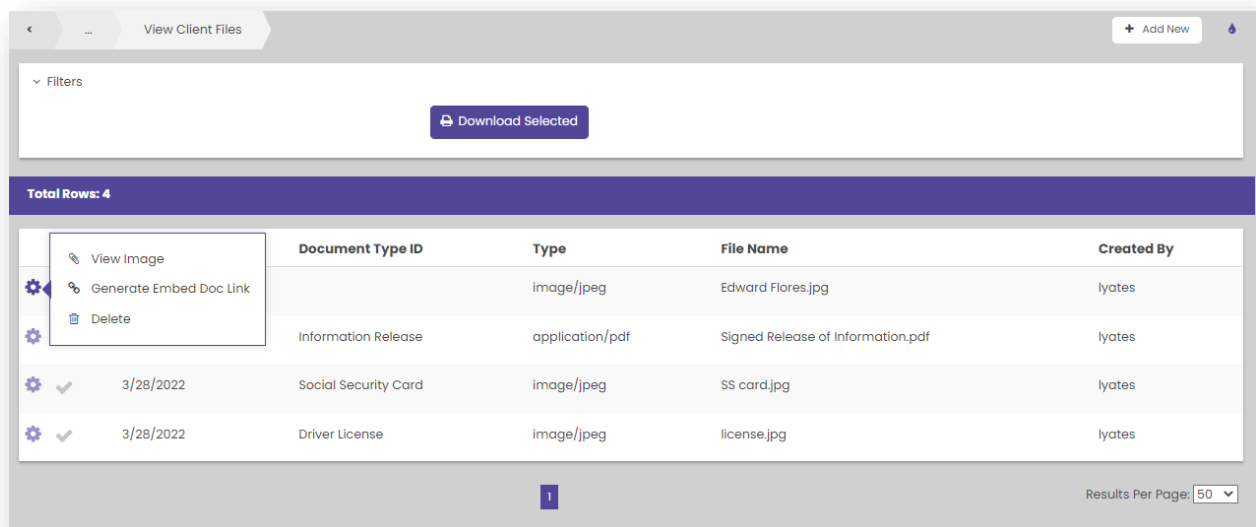
Repeat the process for all necessary documents.

When finished, click SAVE.

All recorded document records appear on the summary form.

View Files

The **View Files** menu item displays document types with an associated file.



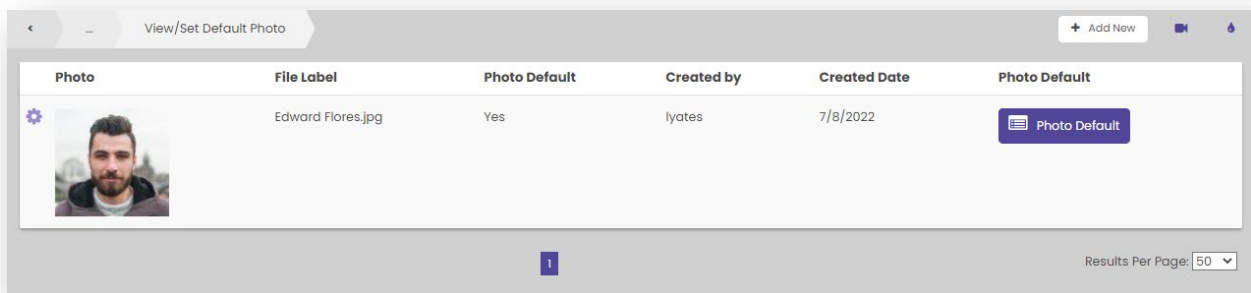
To download a file or multiple files, select each appropriate check mark. Click DOWNLOAD SELECTED to complete a batch download of the files.

The action gear provides the ability to **View the Image**, **Generate an Embeddable Document Link**, or **Delete** the item.

Selecting the ADD NEW button provides the same process and forms for adding a new document type and file.

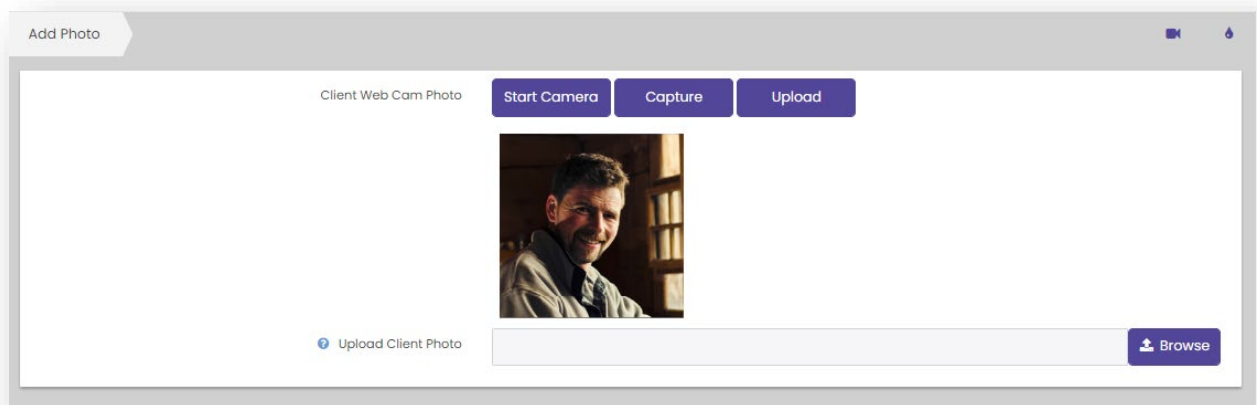
Capture/View Photos

The **Capture/View Photos** menu item is used to capture or upload a photo for the Client.

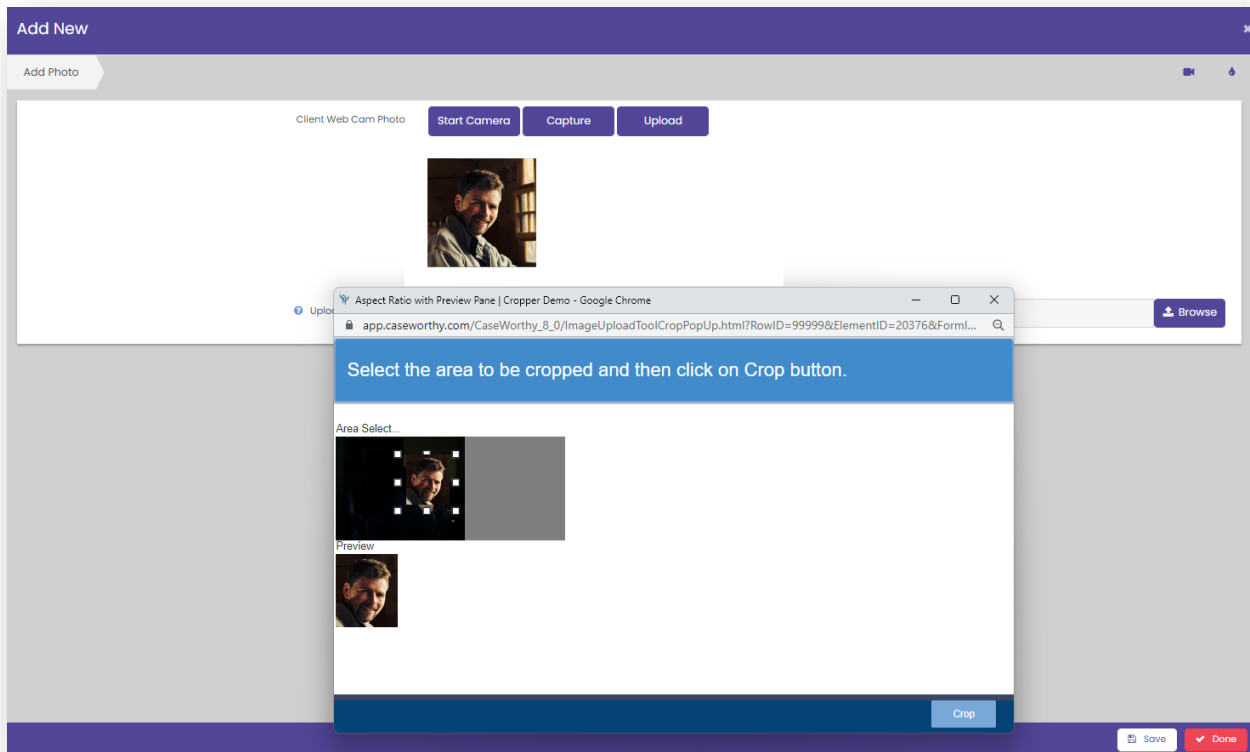


Click ADD NEW to Capture or Upload a photo for the Client.

To take a photo using your computer or device, click START CAMERA.





A live image of what the camera sees appears.



When the Client is ready, click CAPTURE. If the image is satisfactory, click UPLOAD and SAVE the form.

To upload a photo from your device, click the BROWSE button. Select the appropriate file and SAVE the form.

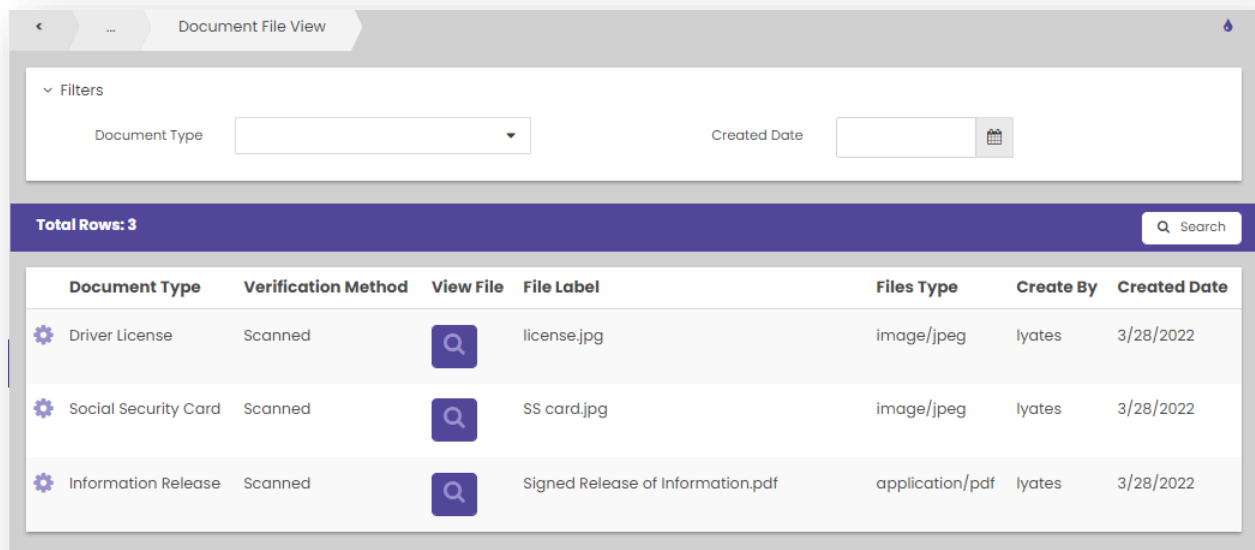
View/Set Default Photo					
Photo	File Label	Photo Default	Created by	Created Date	Photo Default
	Edward Flores.jpg	No	lyates	7/8/2022	<button>Photo Default</button>
	2022-11-25_15-48-47.png	Yes	Saba	11/25/2022	<button>Photo Default</button>

All photos that have been added for the Client appear on the summary form. The PHOTO DEFAULT button indicates which photo is set as the default for the Client and therefore will appear in the entity corner and on scan cards.




Photos may be deleted from the action gear.

Document & File View

Document & File View is simply another way to filter and view all scanned or uploaded files. However, there is no ADD NEW capability here.



The screenshot displays the 'Document File View' interface. At the top, there's a header bar with a back arrow, a breadcrumb 'Document File View', and a user icon. Below the header is a filter section with a 'Filters' dropdown, a 'Document Type' dropdown menu, and a 'Created Date' field with a calendar icon. A status bar indicates 'Total Rows: 3' and includes a search bar. The main content is a table with the following columns: Document Type, Verification Method, View File, File Label, Files Type, Create By, and Created Date. The table contains three rows of data, each with a gear icon in the 'View File' column.

Document Type	Verification Method	View File	File Label	Files Type	Create By	Created Date
Driver License	Scanned		license.jpg	image/jpeg	lyates	3/28/2022
Social Security Card	Scanned		SS card.jpg	image/jpeg	lyates	3/28/2022
Information Release	Scanned		Signed Release of Information.pdf	application/pdf	lyates	3/28/2022

Checklist

The **Checklist** menu item also allows for viewing and management of any document check or file transaction on the Client's record. Clicking ADD NEW on this form only displays checklist item options.

Checklist Summary					
<div> <div>Filters</div> <div> Verification Method <div></div> </div> </div>					
<div> <div>Total Rows: 5</div> <div>Search</div> </div>					
Created Date	Document Type	Verification Method	Description	Restriction	Check ID
4/21/2022		Scanned		Shared	3444
4/21/2022		Scanned		Shared	3445
3/28/2022	Information Release	Scanned		Shared	3438
3/28/2022	Driver License	Scanned		Shared	3436
3/28/2022	Social Security Card	Scanned		Shared	3437

Program Checklist

Program Checklist displays a summary form with all Checklist Items that pertain to the Program Enrollments of the Client. Easily filter the items by **Program** or **Process**.

Program Checklist				
<div> <div>Filters</div> <div> <div>Program</div> <div>Employment Assistance Program</div> </div> <div> <div>Process</div> <div></div> </div> </div>				
<div> <div>Total Rows: 80</div> <div>Search</div> </div>				
Type Description	Required	Process	Date	Item Completed By
Bank Statement	False	Enrollments		
Driver License	False	Client Application		
Application for Admission	True	Client Application		
Social Security Card	True	Client Application	3/28/2022 12:00:00 AM	Yates, Lois
Social Security Card	True	Enrollments	3/28/2022 12:00:00 AM	Yates, Lois
Driver License	True	Client Application	3/28/2022 5:00:00 PM	Yates, Lois
Birth Certificate	False	Provider Application		

Once an item of the same document type is associated with the Client, a Date and time stamp will appear, as well as the User who completed the item.

This concludes the *Documents and Checklists Dashboard* video.