DOCUMENTS AND CHECKLISTS– VIDEO COMPANION GUIDE

CaseWorthy Training & Documentation

Contents

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.

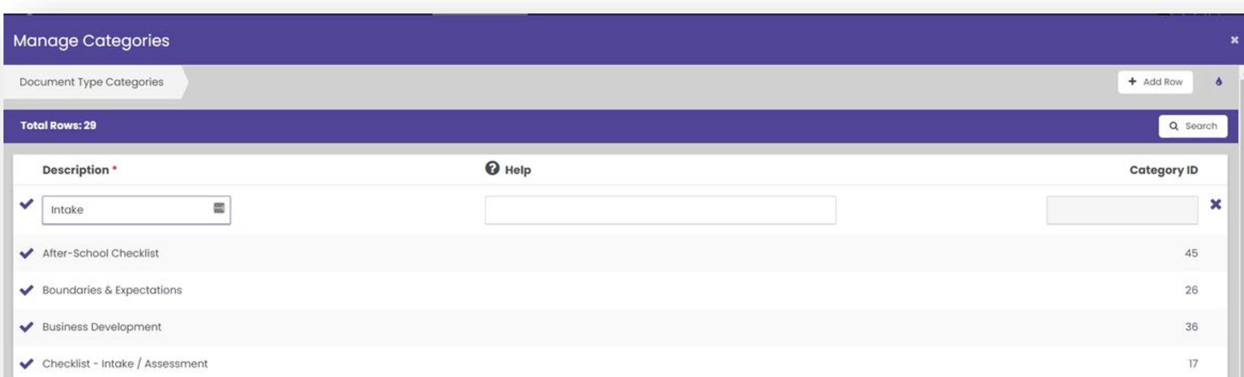
Document Management

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**.



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.

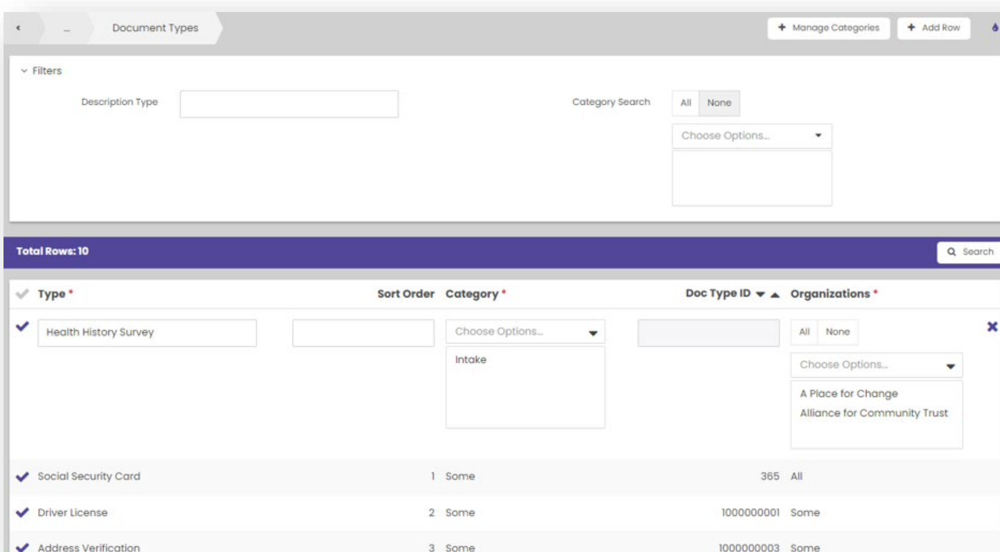
The **Help** field may be used to provide further insight into the category.

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.



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.

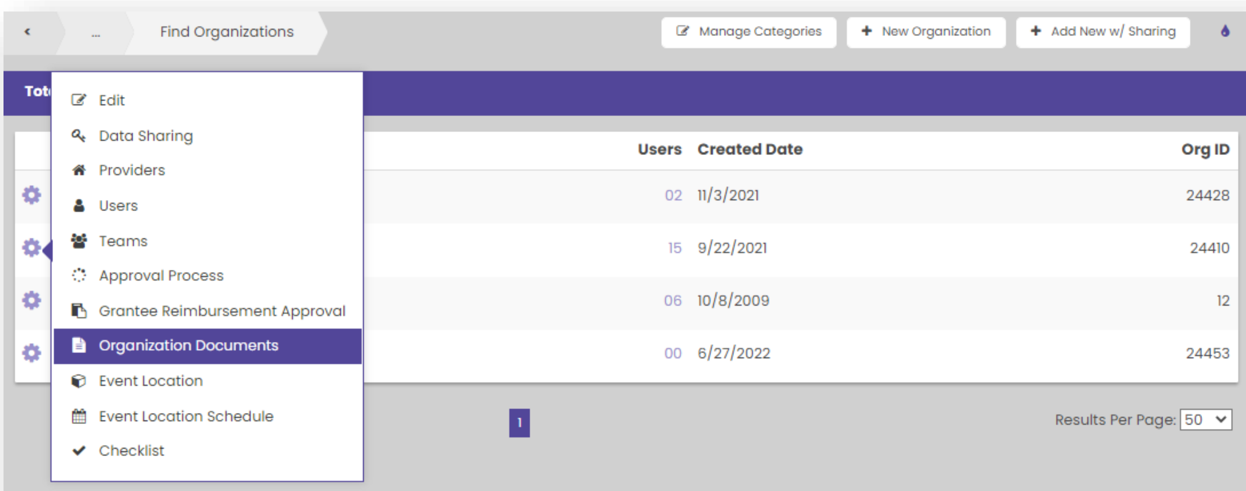
Categories are used to filter document types in searches.

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

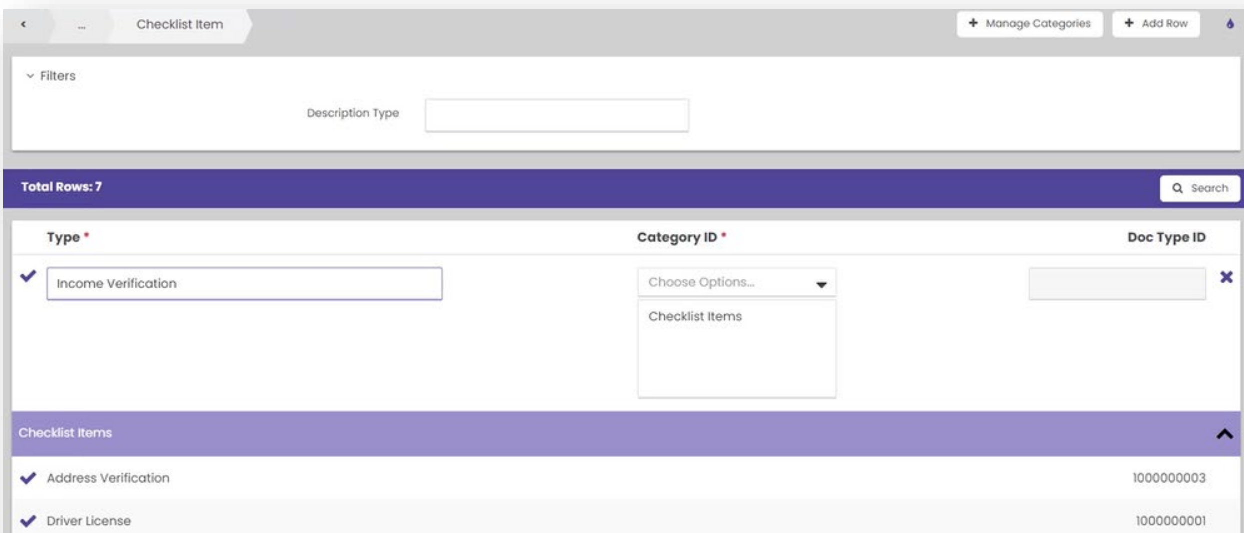
This second video in the *Documents and Checklists* series details setup for Checklist functionality.

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.



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.

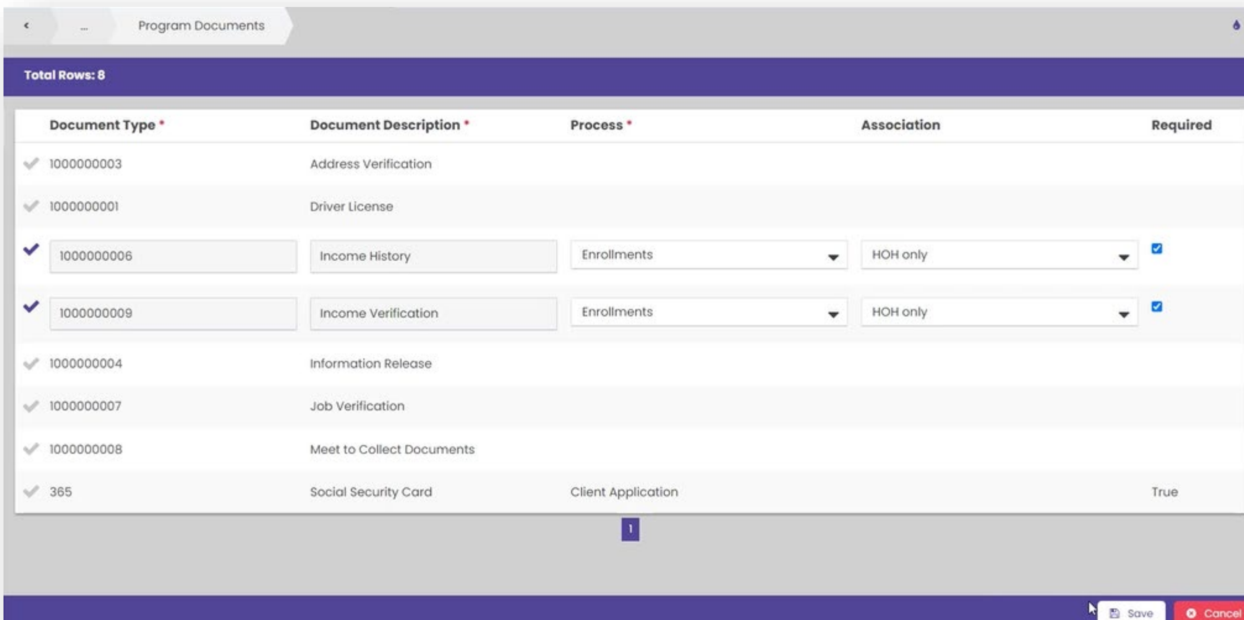
Checklist Items may be something that is not document related.

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.



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.

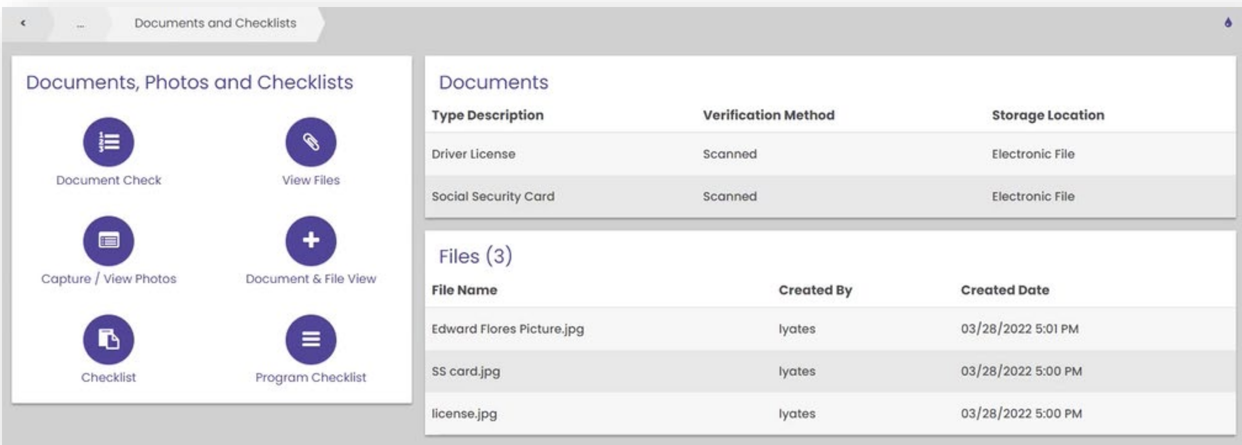
Repeat the process for all items that must be associated with a program.

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

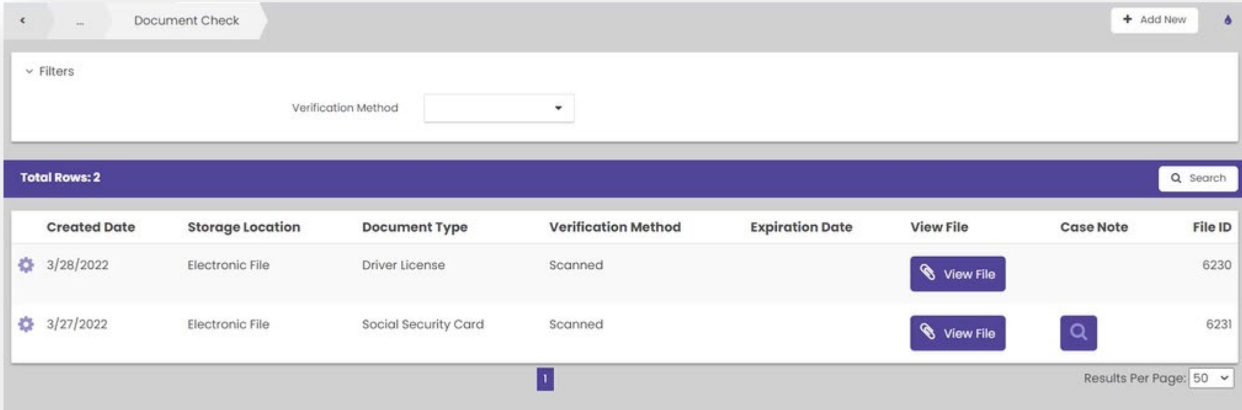
The *Documents* query widget displays the Client's 10 most recently recorded documents. The query links to the *Document Check* summary form where all Client documents are managed.

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

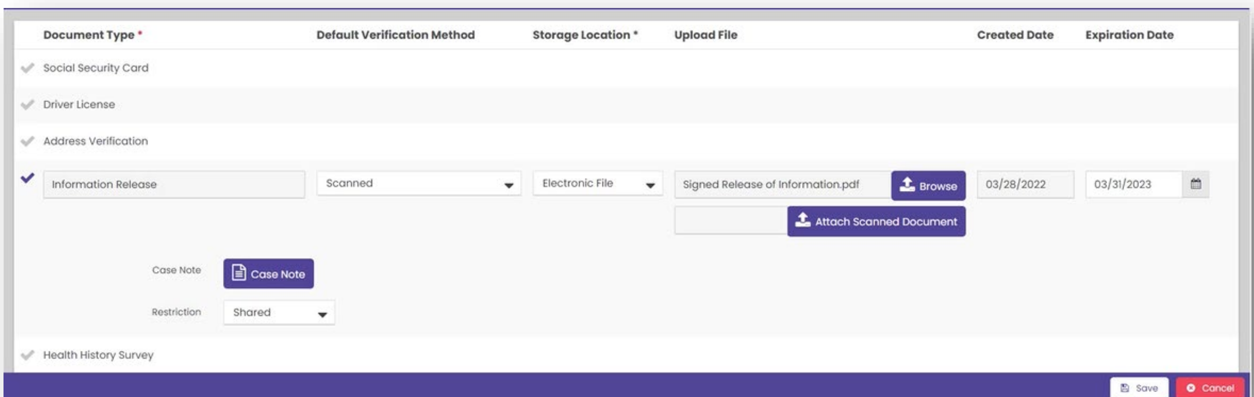
Document Check

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



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.



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.

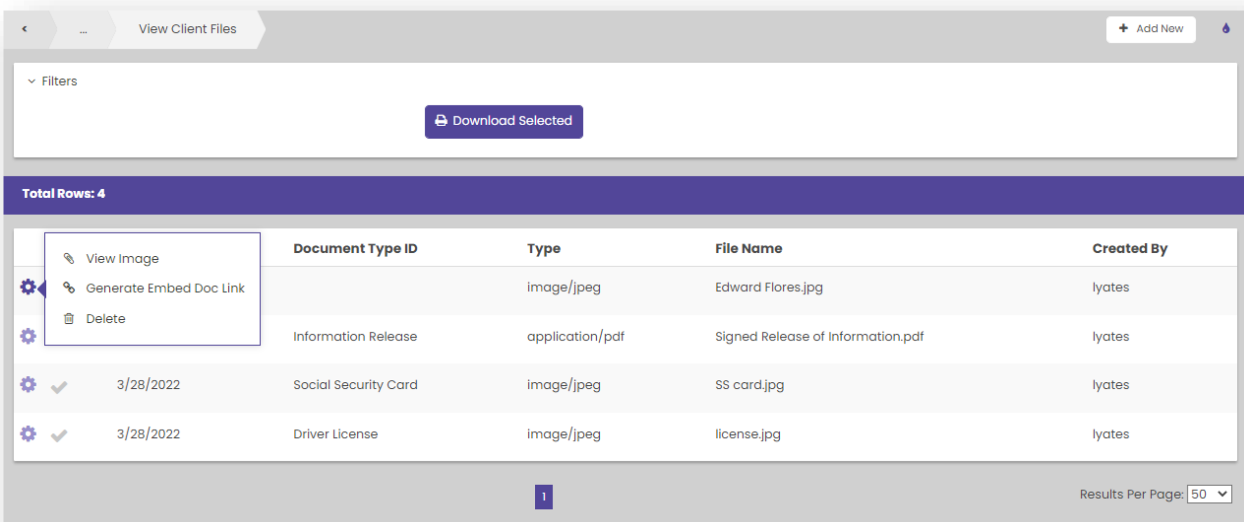
Repeat the process for all necessary documents.

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.



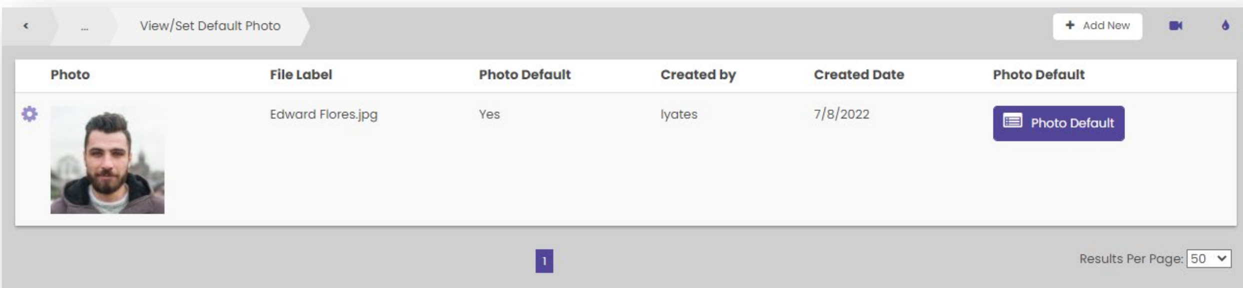
To download a file or multiple files, select each appropriate check mark. Click DOWNLOAD SELECTED to complete a batch download of the files.

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.

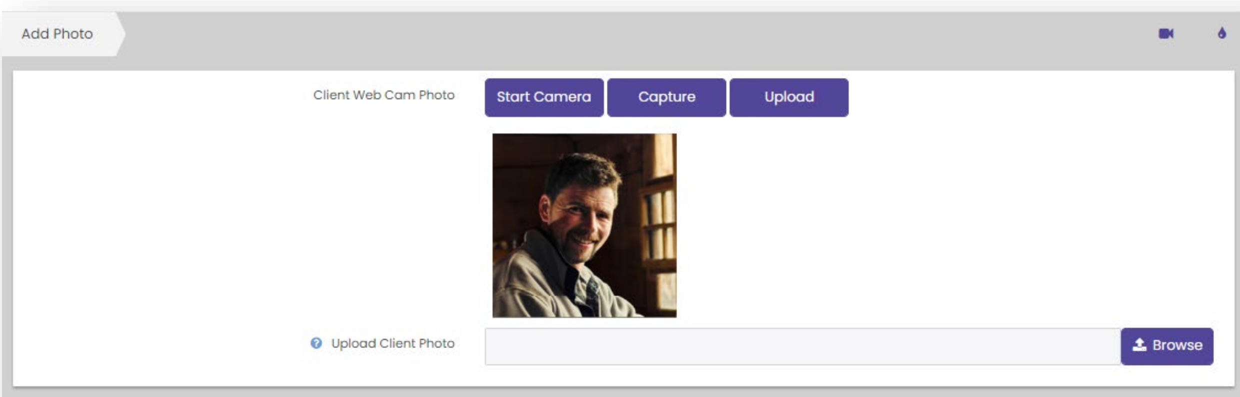
Capture/View Photos

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

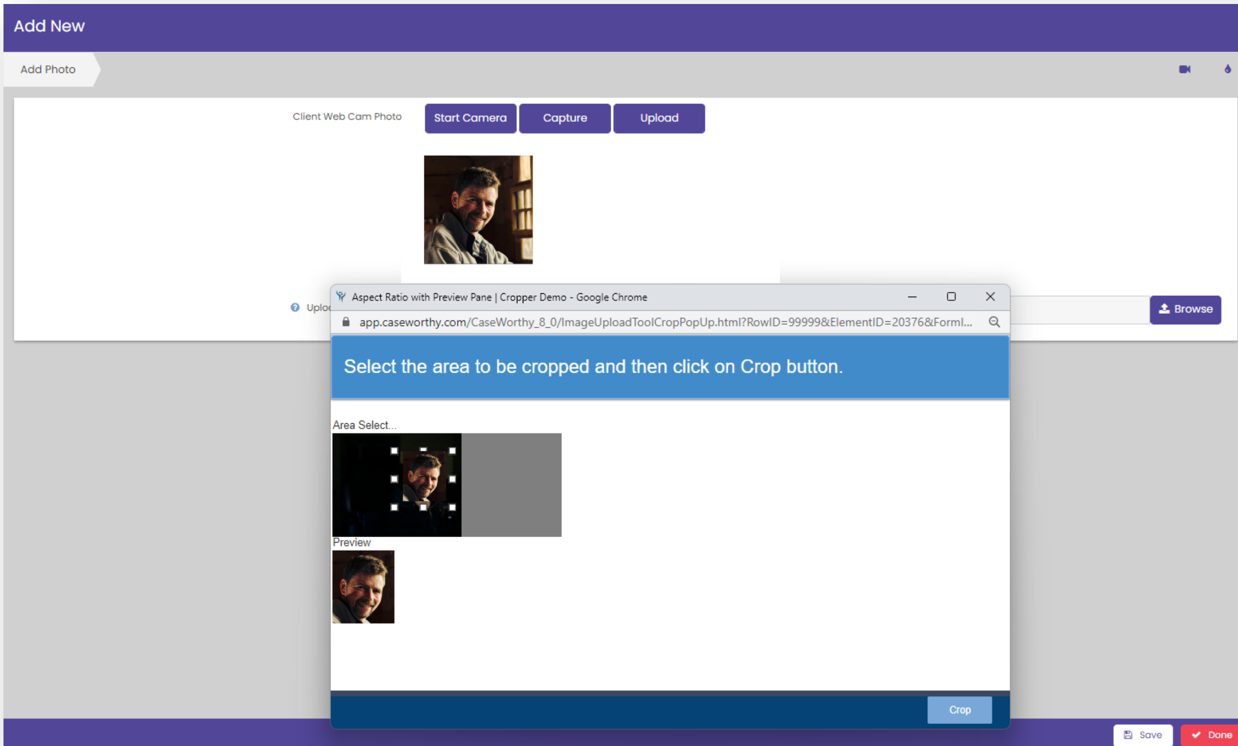


Click ADD NEW to Capture or Upload a photo for the Client.

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

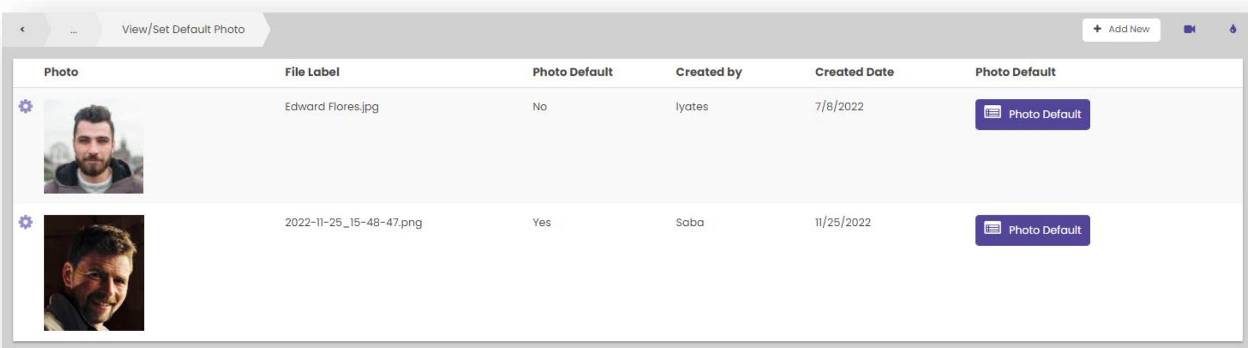


A live image of what the camera sees appears.



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.

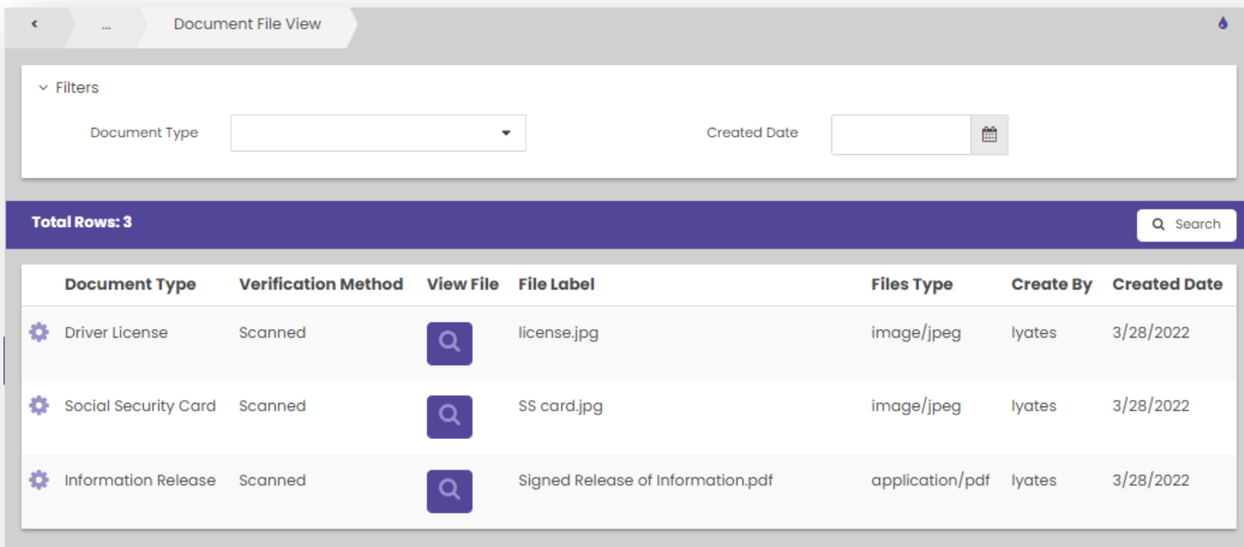


All photos that have been added for the Client appear on the summary form. The PHOTO DEFAULT button indicates which photo is set as the default for the Client and therefore will appear in the entity corner and on scan cards.

Photos may be deleted from the action gear.

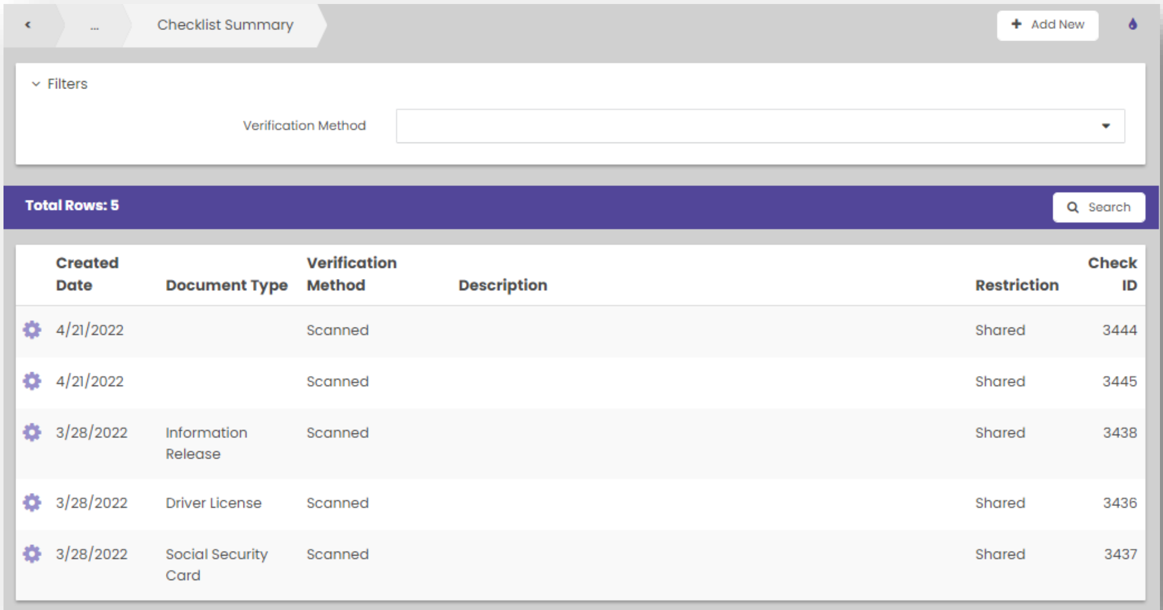
Document & File View

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



Checklist

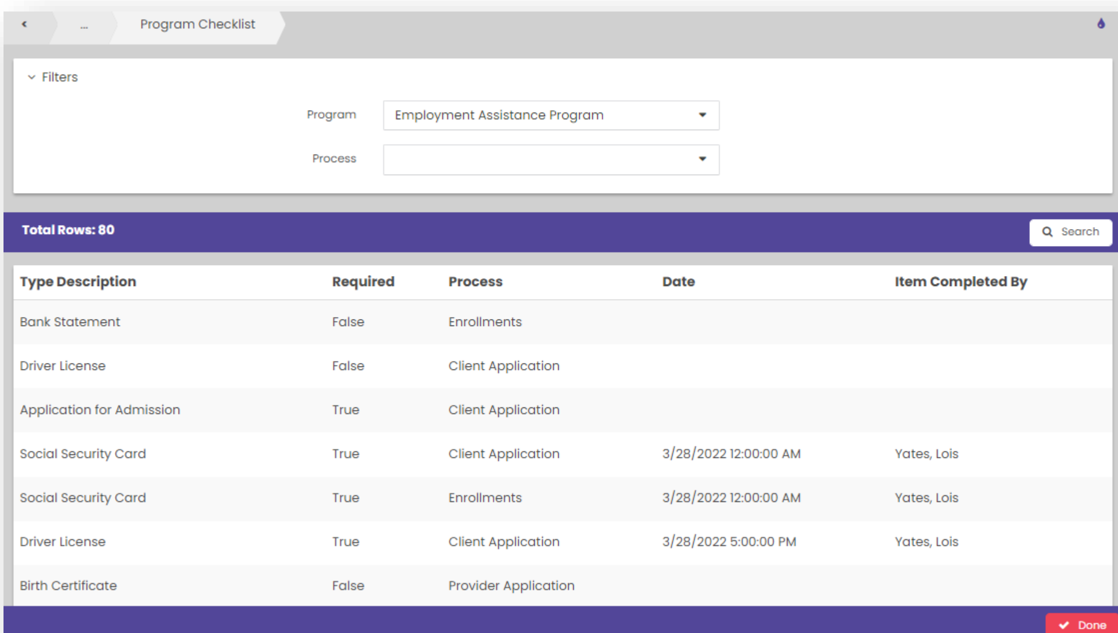
The **Checklist** menu item also allows for viewing and management of any document check or file transaction on the Client's record. Clicking ADD NEW on this form only displays checklist item options.



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**.



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.