

CaseWorks Advanced Training

DocBox Management

May 2025

Today's Agenda

NCT

- What is DocBox Management?
- DocBox Views
- Working in Team DocBoxes
- Pending Documents
- Best Practices for DocBox Management

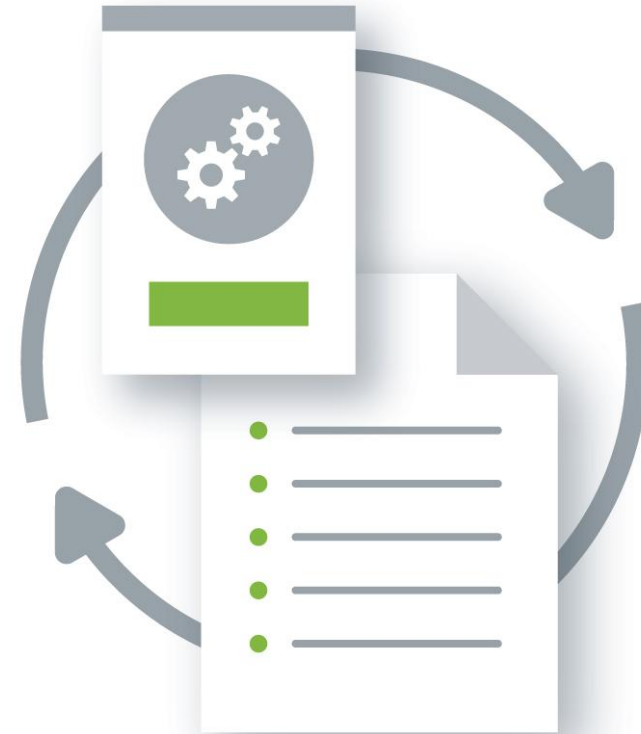
What is DocBox Management?

- ✓ CaseWorks is an *electronic document management system (EDMS)* for Health and Human Services programs.
- ✓ CaseWorks *routes documents* to DocBoxes based on Case Ownership and customized routing configured by County.
- ✓ CaseWorks *features allow for individual and team DocBox Management* based on specific workflows and processing.
- ✓ *Processes and best practices* include organization and management of DocBoxes to increase efficiency in workflows.



Viewing your home page DocBoxes

- Collapsible individual and Team DocBoxes
- Join/Leave Team DocBoxes
- Default sort order
- Filtering documents
- Sorting documents



Accessing Views

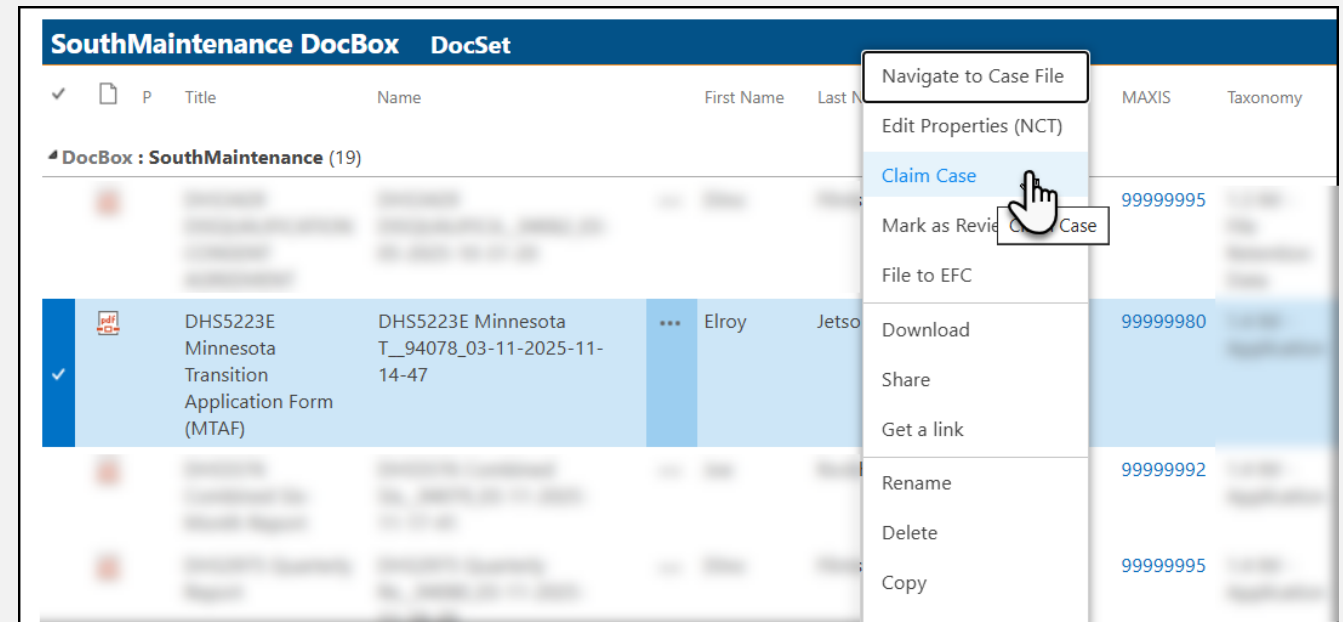
- Shortcuts from the DocBox
 - Pending
 - All documents
 - Working documents
 - Favorite DocBox (NextGen)
- Document Processing Center (DPC)
 - Individual and Team DocBoxes
 - All Documents view
 - Favorite DocBoxes and Manage Favorites
- Document Discovery (NextGen)

Claiming

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Claim a Case

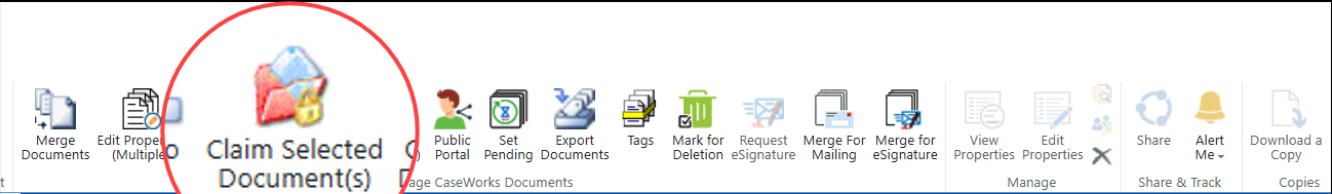
- For Case Banking Counties – a Case can be claimed from a Case Bank DocBox associated with a “Case Owner” (i.e. X001FAM – Family Team DocBox)
 - When **Claim Case** is selected from the dropdown on a case document, all documents for that case in that DocBox will move to your individual DocBox
 - New documents for that case will route to your DocBox until all documents for that case are filed to the EFC or all moved back to the Case Bank DocBox



Claiming Documents & Claiming Cases

Claim Documents

- Claiming documents moves only selected document(s) to your individual DocBox



The screenshot shows the NCT CaseWorks interface. At the top, there is a toolbar with various icons. The icon for 'Claim Selected Document(s)' is circled in red. Below the toolbar, there is a table with columns: Title, Name, Short Note/Next Step, MAXIS, Taxonomy, Created, Date Received, and Created By. The table is divided into two sections: 'DocBox : TaniGorman (4)' and 'SouthMaintenance DocBox DocSet'. The 'SouthMaintenance DocBox DocSet' section contains a table with columns: Title, Name, First Name, Last Name, Short Note/Next Step, MAXIS, Taxonomy, Created, and Date Received. The table lists two documents:

Title	Name	First Name	Last Name	Short Note/Next Step	MAXIS	Taxonomy	Created	Date Received
DHS5223E Minnesota Transition Application Form (MTAF)	DHS5223E Minnesota T_94078_03-11-2025-11-14-47	Elroy	Jetson	...	99999980	1.4 IM - Application	3/11/2025 11:14 AM	
DHS5576 Combined Six-Month Report	DHS5576 Combined Six_94079_03-11-2025-11-17-41	Joe	Rockhead	...	99999992	1.4 IM - Application	3/11/2025 11:17 AM	

Pending Documents - Use cases

Pending Documents can be used to manage a DocBox. Pending documents allows you to “set the document aside” until a specified date. On that date, documents will show as an Action Item under the Pending documents category.

Pending documents are viewable by clicking on Pending in your DocBox view or by navigating to the DPC for a Team DocBox.

Based on County setup, any new documents will come in for “Today” if there is an existing pended document.

Financial Services

- 10-day cutoff
- Application Interviews

Healthcare

- Renewals
- Newborn SSN

Child Support

- Service of Process
- County Attorney processes

Social Services

- Client visit preparation
- Reassessments

Point-in-Time View – Extract

- Pending documents
- All DocBox view (Team DocBox)
- Using excel for Point-in-time looks

Best Practices for DocBox Management

- ✓ Filing documents to the *Electronic Filing Cabinet* once reviewed and processed.
- ✓ *Managing documents* in DocBoxes using tools in CaseWorks including Team DocBox workflows and processing, Short Note Next Step, Pending documents, and other feature functionality to accommodate your individual or team workflows.
- ✓ Implementing a consistent *Purge process* within your County across the various Editions of CaseWorks that adhere to MN Data Practices and minimize unnecessary retainment of documents in your Case Files.
- ✓ *Monitoring and reporting* for Supervisory and Management teams.



Question and Answer

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Thank you!

Have ideas for future topics?

Submit them here!

[CaseWorks Advanced Training Topics](#)