



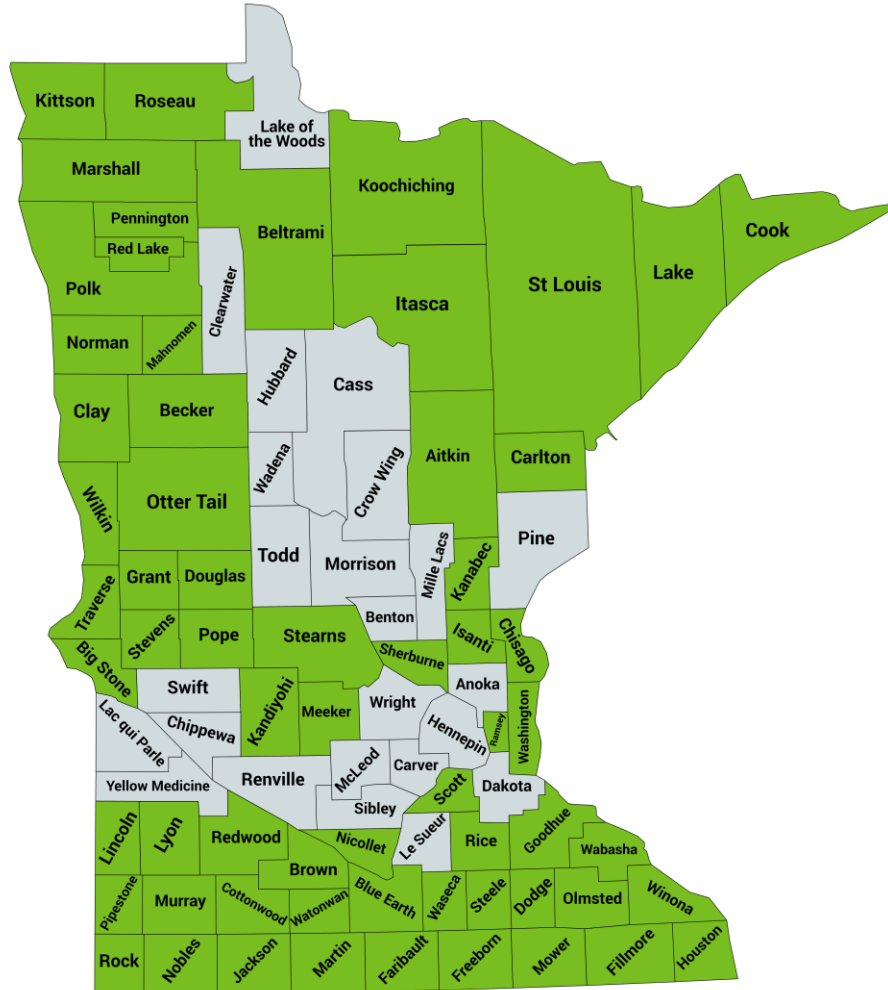
# CaseWorks™

Advanced Document & Process Management

## Client Portal User Manual



# The 63 CaseWorks™ Counties



*This is a CaseWorks County Map list only and should not be used as a list for Case Transfers.*

- Aitkin
- Becker
- Beltrami
- Big Stone
- Blue Earth
- Brown
- Carlton
- Chisago
- Clay
- Cook
- Cottonwood
- Dodge
- Douglas
- Faribault
- Fillmore
- Freeborn
- Goodhue
- Grant
- Houston
- Isanti
- Itasca
- Jackson
- Kanabec
- Kandiyohi
- Koochiching
- Kittson
- Lake
- Lincoln
- Lyon
- Mahnomen
- Marshall
- Martin
- Meeker
- Mower
- Murray
- Nicollet
- Nobles
- Norman
- Olmsted
- Otter Tail
- Pennington
- Pipestone
- Polk
- Pope
- Ramsey
- Red Lake
- Redwood
- Rice
- Rock
- Roseau
- Scott
- Sherburne
- Steele
- Stearns
- St. Louis
- Stevens
- Traverse
- Wabasha
- Waseca
- Washington
- Watonwan
- Wilkin
- Winona

# Using the CaseWorks User Manual

## Purpose of this Document

This User Manual was created for CaseWorks Users to provide step-by-step instructions for the Client Portal features within CaseWorks.

## Table of Contents

By hovering over each topic in the User Manual Table of Contents, you can skip to that section. To get back to the Table of Contents, click on the footer link [Back to Top](#) located on the bottom left of each page.

## Hyperlinks

In this document, you will see hyperlinks in [blue underlined font](#). This indicates that there is related content that is located in another section of the document. Click on the [blue underlined link](#) to go to that section of the document.

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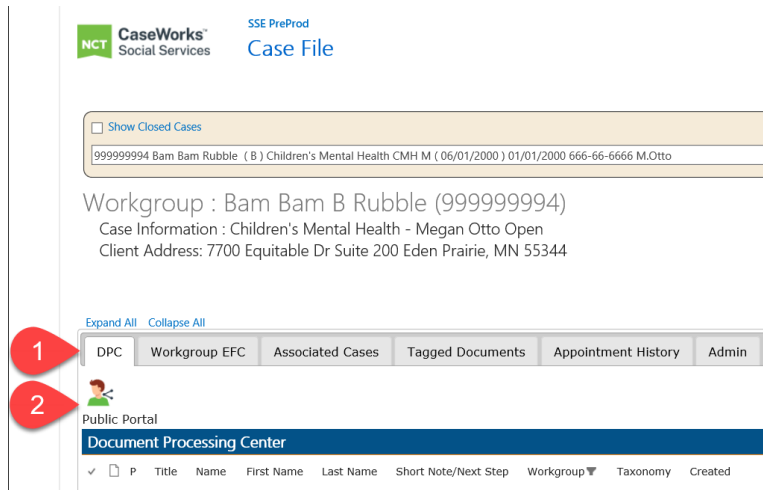
## Client Portal

### County Staff Perspective

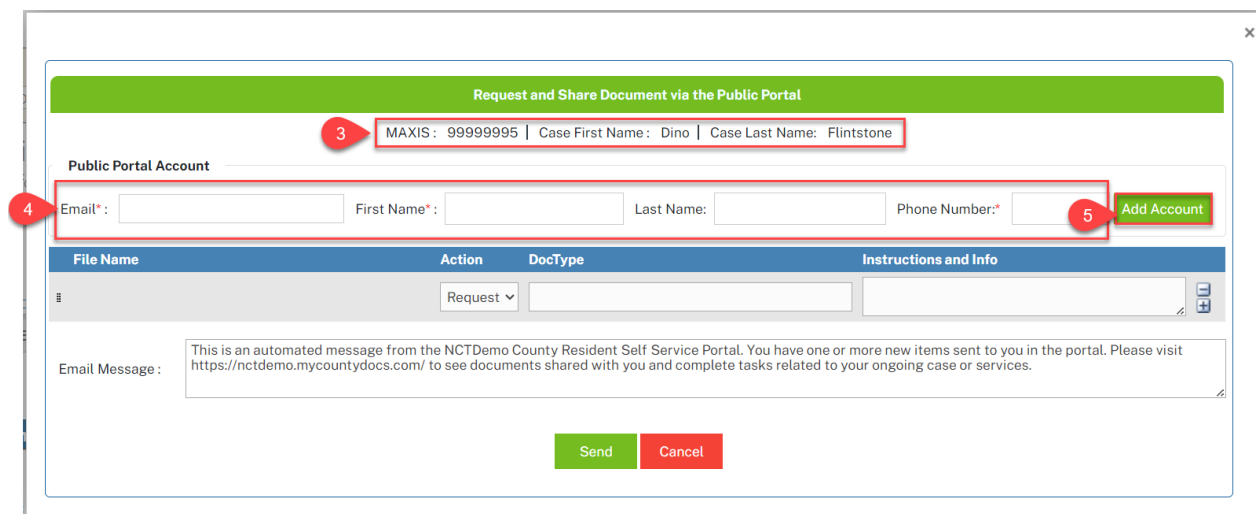
#### Adding a Portal Account for the Client

The first step in inviting one of your clients to utilize the Public Self-Service Portal is adding a Portal Account in CaseWorks to initiate an account setup. To do so, begin by navigating to the client’s casefile page.

1. Click on the DPC tab.
2. Select the Public Portal icon.



3. A window will appear which lists the client’s Case Number, First Name, and Last Name.
4. Enter the client’s email address, name information and a valid mobile phone number.  
**Note:** If an account has already been created, the email will populate when typing and name fields will autofill (the phone number field will not appear).
5. Select ‘Add Account’. This will send the client an email with a One Time Password to create their account.  
**Note:** If an account already exists for the email address entered, a red message will appear at the bottom of the window.



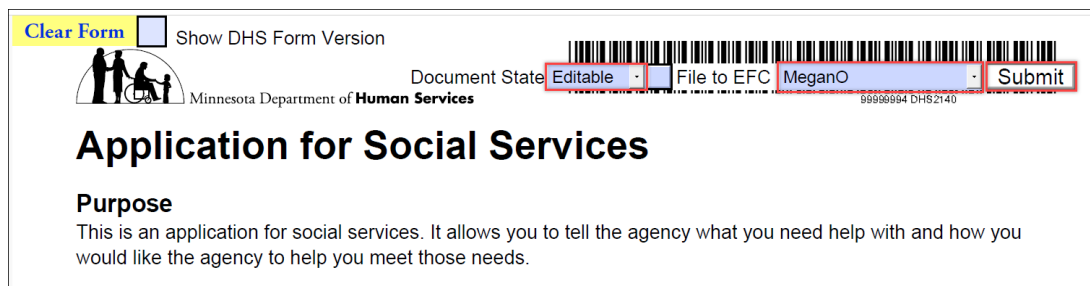
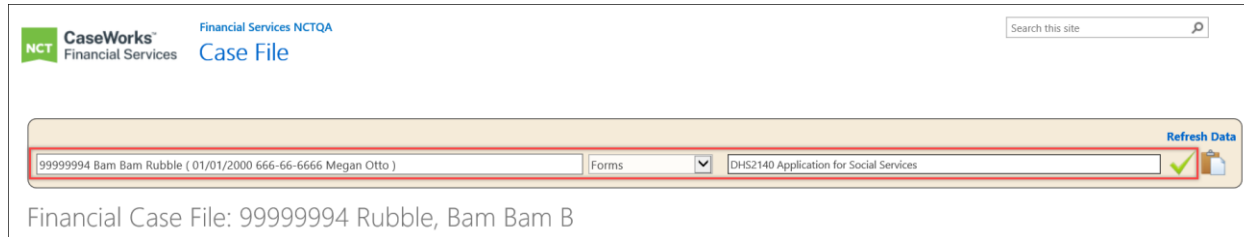
**Note:** Public Portal requests can be sent to the account even if a client has not completed their account registration yet; documents shared, and requests made will be available to the client once they register.

From the screen shown in the picture above, the County Staff can fill out the remaining fields and click ‘Send’ to send request(s) to the client. For further instructions on sending requests and sharing documents via the Portal, please see our sections below.

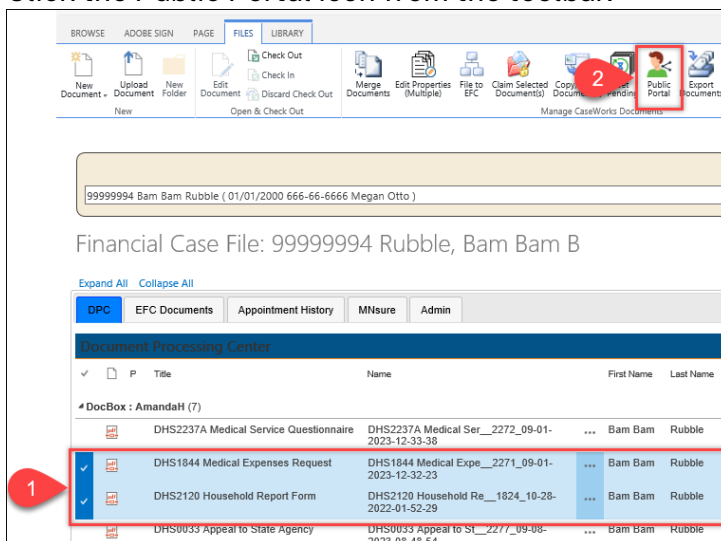
## Actions: Requesting Documents and Sharing documents

### Requesting Forms for Client to Fill Out and Return

In order to send a form to a client to fill out and return via the Portal, the County Staff will want to first generate the auto-filled CaseWorks form(s) and save as **Editable** to their DocBox.



1. From either your homepage DocBox or the DPC tab in the Casefile page, select which form(s) you wish to send to the client to complete and return.
2. Click the Public Portal icon from the toolbar.



3. A window will appear which lists the client’s Case Number, First Name, and Last Name.
4. Enter the client’s email address and name information.
5. The forms selected will show under the blue banner and can be reordered by clicking and dragging.
6. Under the Action column, choose Request.
7. Under the Instructions and Info column, type any instructions for the client.
8. The Email Message window populates with the default statement which prompts the client that they have new items to review in the Portal.
9. Click Send.

10. After a Public Self-Service Portal request is sent, the document’s Short Note/Next Step is updated to “Public Portal – [email address] was sent this on [DateTime].”

|                                  |  |     |         |   |
|----------------------------------|--|-----|---------|---|
| DHS1844 Medical Expenses Request | DHS1844 Medical Expe__2271_09-01-2023-12-32-23 | ... | Bam Bam | Public Portal - megan.otto@nctinc.com was sent this on 9/19/2023 10:45:24 AM. |
| DHS2120 Household Report Form    | DHS2120 Household Re__1824_10-28-2022-01-52-29 | ... | Bam Bam | Public Portal - megan.otto@nctinc.com was sent this on 9/19/2023 10:45:24 AM. |

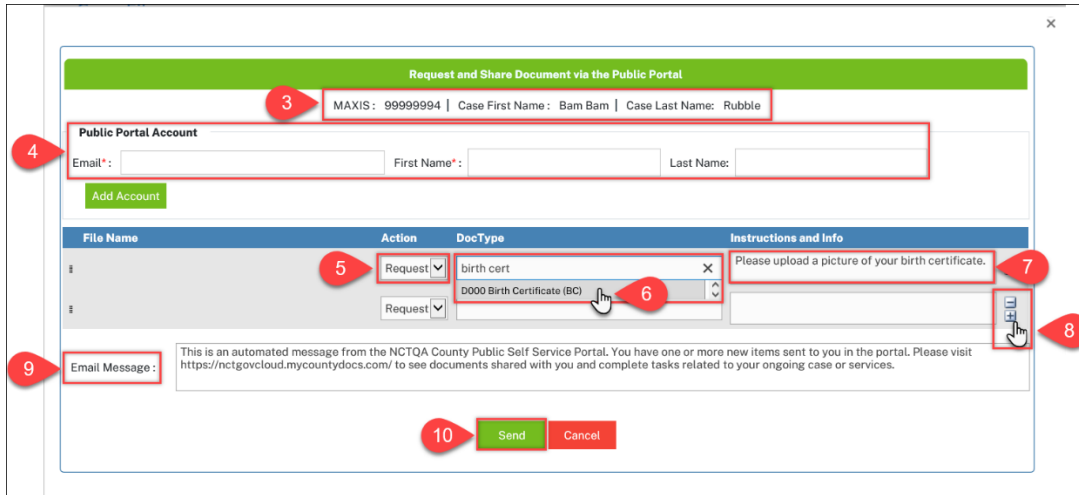
### Requesting Documents for Client to Upload

County Staff have the ability to request documents from clients. For example, if a worker needed a client to provide a picture of their birth certificate, pay stubs, etc., this request can be made from CaseWorks through the Portal. To do so, begin by navigating to the client’s casefile page.

1. Click on the DPC tab.
2. Select the Public Portal icon.

3. A window will appear which lists the client’s Case Number, First Name, and Last Name.
4. Enter the client’s email address and name information.
5. Under the Action column, choose Request.
6. In the Doctype field, enter and select the name of the document being requested.
7. In the Instructions and Info section, type any instructions for the client.
8. Click the plus sign to add additional document requests.

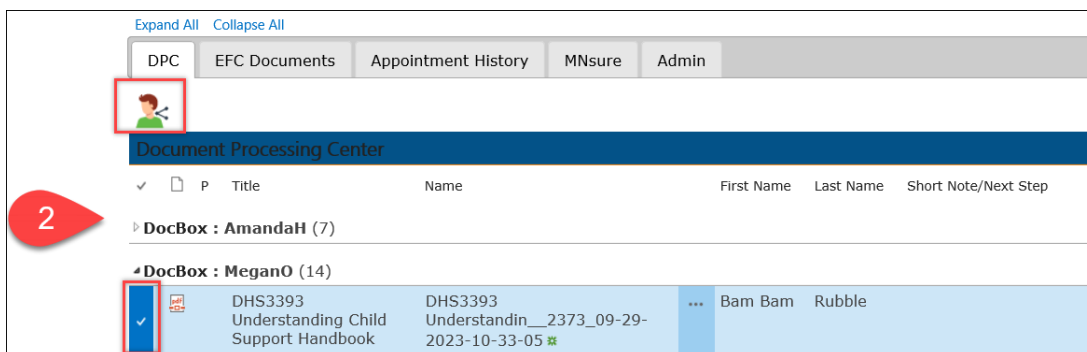
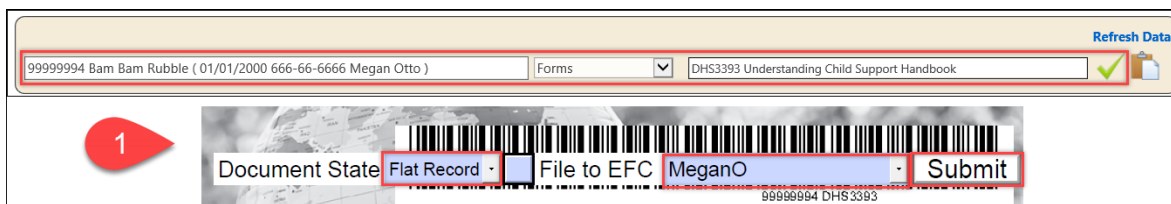
9. The Email Message window populates with the default statement which prompts the client that they have new items to review in the Portal.
10. Click Send.



### Sharing Documents

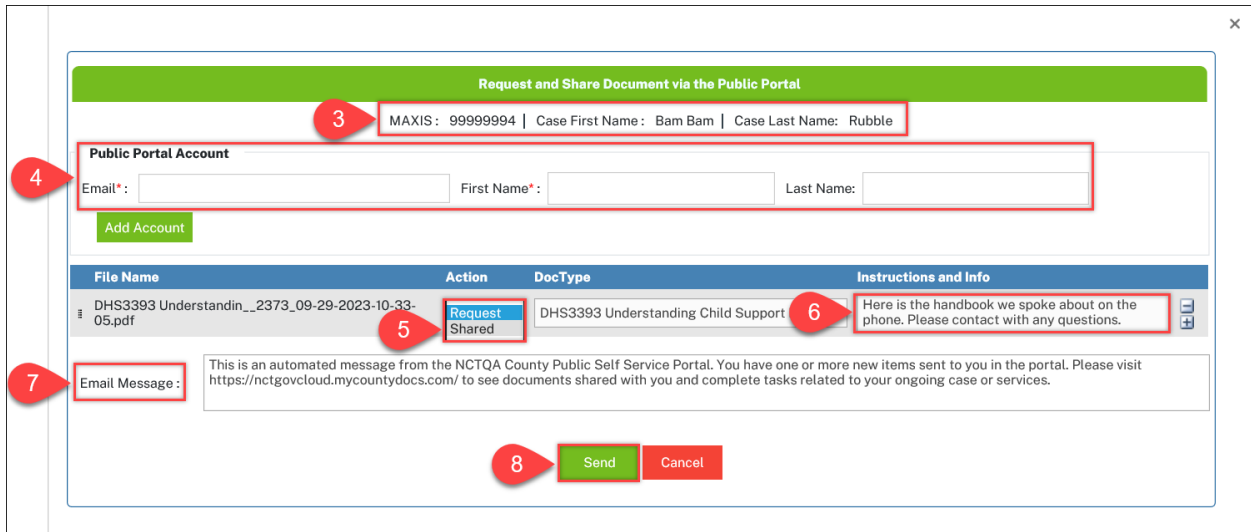
County Staff have the ability to share documents with clients. For example, if a worker needed to share a document with a client for informational purposes, such as their Rights and Responsibilities or a Verification Request Form, these can be shared from CaseWorks through the Portal. To do so, begin by locating the document.

1. Generate the auto-filled form and save as a **Flat Record** to your DocBox or file to the EFC.
  - a. If the document is already in CaseWorks, simply navigate to the document in the casefile page.
2. Select the document(s) you wish to share with the client and click the Public Portal icon.

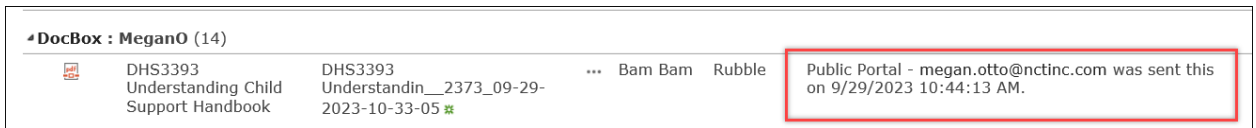


3. A window will appear which lists the client’s Case Number, First Name, and Last Name.

4. Enter the client’s email address and name information.
5. Under the Action column, choose Shared.
6. In the Instructions and Info section, type any instructions for the client.
7. The Email Message window populates with the default statement which prompts the client that they have new items to review in the Portal.
8. Click Send.



9. After the Shared Document(s) have been sent, the Short Note/Next Step is updated to “Public Portal – [email address] was sent this on [DateTime].”

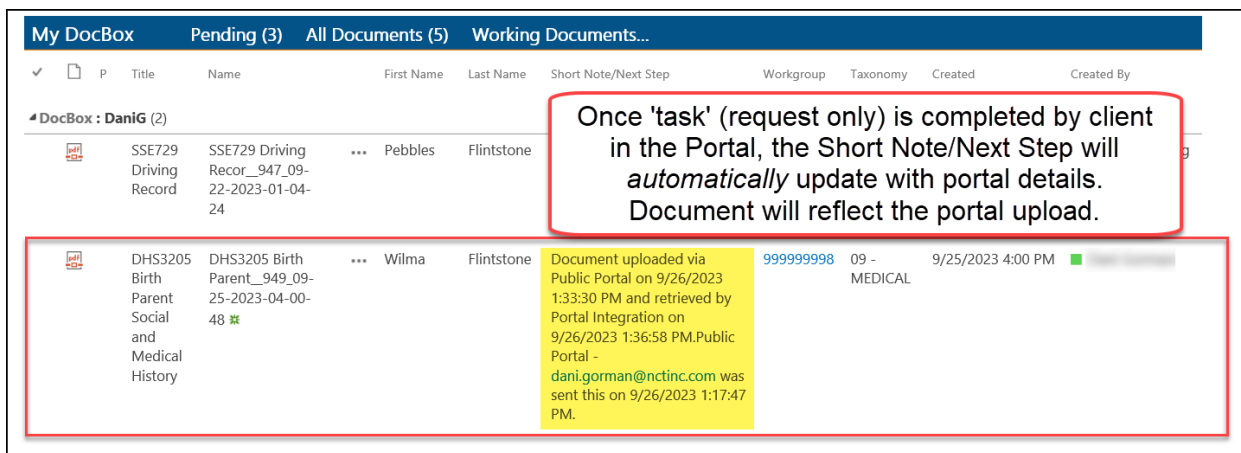


## Incoming Documents

When a client completes a request in the Portal, the incoming document can be located in CaseWorks as follows:

### Documents in a DocBox

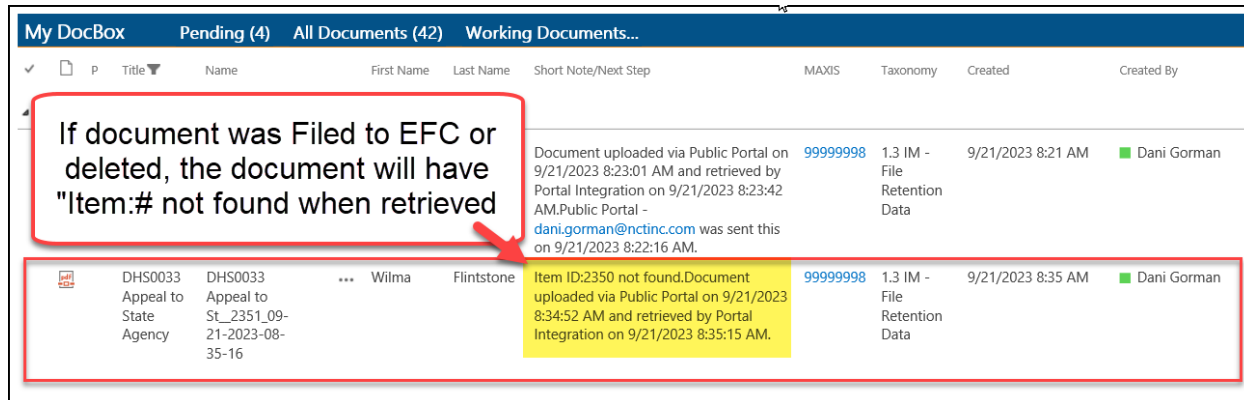
If the requested document remains in a DocBox (Individual or Team), the document submitted by the client will be updated in that DocBox. This includes a Date Stamp is added to the file



being visible in the Edit Properties (NCT) preview.

### Documents Filed to EFC or Deleted

If the requested document is Filed to the EFC (or deleted) after request and before completion, the original request will remain in the EFC (or Recycle Bin) and a new copy of the document will be routed to the Case Owner with a Short Note/Next Step that indicates the document was completed through the portal.



**Note:** If a Routing Rule is set, the incoming document will route based on routing rule. If Case Banking is present, it will follow Case Banking owner.

### All Documents

All requests and shared documents can be tracked in the Admin tab of the casefile page. For more information on reviewing Public Portal documentation in the Admin tab, click [here](#).

### Documents with Signatures

Forms that require signatures should continue to be sent through the integrated CaseWorks eSignature feature to retain signature tracking included in the feature. Forms can be both completed and signed by clients via eSignature by saving the form as editable, and unchecking “Flatten All fields except Requested and Signature Field(s)” in the Request eSignature window.

Request eSignature ✕

Client First Name:

Client Last Name:

One signer at a time  
 After first signer, additional signers notified simultaneously  
 All signers notified simultaneously

| Signer(s)  | Email Address(es)                  | Steps |
|--|------------------------------------|-------|
| SIGN YOUR NAME HERE                                    | subha.pazhanithamarai@NCTIndia.com | 1     |
| HAVE THE SECOND ADULT SIGN HERE                        |                                    |       |
| PERSON WHO HELPED COMPLETE THE FORM SIGN HERE          |                                    |       |
| EMPLOYER SIGNATURE (NEEDED IF YOU DONT HAVE PAY STUBS) |                                    |       |
| SIGNATURE  |                                    |       |

Password:

Flatten All Fields except Requested and Signature Field(s)

\* Add a Message:

NOTE: Signature field names are in order as they appear on the form

Uncheck this box to allow resident to complete the fields in the form.

## Tracking Public Portal Requests and Shared Documents: Admin Tab

All Requests and Shared Documents can be reviewed and tracked in the Admin Tab of the client’s Casefile page. They will appear under the blue banners: ‘Public Portal Requests’ and ‘Public Portal Shared Docs’.

1. Navigate to Case File page
2. Click on Admin tab
3. See Public Portal Requests

The screenshot shows the CaseWorks interface for a client's Case File. At the top, the client name '9999998 Wilma Flintstone' is displayed with a red callout '1'. Below this, a navigation bar contains tabs for 'DPC', 'EPC Documents', 'Appointment History', 'Misure', and 'Admin', with 'Admin' selected and highlighted by a red callout '2'. Under the 'Admin' tab, there is a blue banner for 'Public Portal Requests' with a red callout '3'. Below the banner is a table of requests.

| ID  | Portal ID              | File Name   | DocType   | Instructions and Info | Status    | Completed            | Created              | Created By  |
|-----|------------------------|---|---|-----------------------|-----------|----------------------|----------------------|-------------|
| 251 | devine11@gmail.com     |   | 0001 Drivers License (DL) - State ID  |                       | New       |                      | 8/21/2023 3:20:17 PM | Dani Gorman |
| 248 | dani.gorman@nctinc.com | CH50033 Appeal to St_2385_09-21-2023-08-24.pdf    | CH50033 Appeal to State Agency  |                       | Completed | 8/21/2023 8:34:52 AM | 8/21/2023 8:32:89 AM | Dani Gorman |
| 244 | dani.gorman@nctinc.com | CH50033 Appeal to St_2348_09-21-2023-08-21-53.pdf | CH50033 Appeal to State Agency  |                       | Completed | 8/21/2023 8:23:01 AM | 8/21/2023 8:22:17 AM | Dani Gorman |
| 242 | dani.gorman@nctinc.com | CH51844 Medical Expa_2348_09-21-2023-07-62-42.pdf | CH51844 Medical Expenses Request  |                       | Completed | 8/21/2023 7:56:49 AM | 8/21/2023 7:53:49 AM | Dani Gorman |
| 241 | dani.gorman@nctinc.com | CH51844 Medical Expa_2344_09-21-2023-07-41-40.pdf | CH51844 Medical Expenses Request  |                       | New       |                      | 8/21/2023 7:42:22 AM | Dani Gorman |
| 240 | dani.gorman@nctinc.com | CH51844 Medical Expa_2342_09-21-2023-07-31-53.pdf | CH51844 Medical Expenses Request  |                       | Completed | 8/21/2023 7:33:42 AM | 8/21/2023 7:31:53 AM | Dani Gorman |
| 239 | dani.gorman@nctinc.com | CH50290 Medical Asa_3358_09-21-2023-07-13-58.pdf  | CH50290 Medical Assistance for Families with Children and Adults (MFA) Income Eligibility |                       | Completed | 8/21/2023 7:20:08 AM | 8/21/2023 7:17:33 AM | Dani Gorman |

Shared Docs appear under Public Portal Requests.

Financial Case File: 99999999 Rubble, Betty B

Expand All Collapse All

DPC EFC Documents Appointment History Misure Admin

**Priority**

New Actions - View: Priority -

MAXIS DocType Title

There are no items to show in this view of the "Priority" list.

**File Retention**

New Item or edit this list

Title MAXIS Date Closed Transferred Date Transferred To Exceptions Retention Comments Created Modified Modified By

There are no items to show in this view of the "File Retention" list.

View Transferred File

**Public Portal Requests**

Cancel Request Update Now

| ID  | Portal ID                  | File Name  | DocType                                    | Instructions and Info                     | Created              | Created By      |
|-----|----------------------------|--|--|---|----------------------|-----------------|
| 143 | cathy.wassenaar@nctinc.com | DHS2402 Change Requir_2324_08-24-2023-01-48-32.pdf | DHS2402 Client Responsibilities and Rights | for your review                           | 9/15/2023 2:51:12 PM | Cathy Wassenaar |
| 124 | cathy.wassenaar@nctinc.com | DHS2402 Change Requir_2324_08-24-2023-01-48-32.pdf | DHS2402 Client Responsibilities and Rights | for your review and file                  | 9/15/2023 2:38:52 PM | Cathy Wassenaar |
| 41  | cathy.wassenaar@nctinc.com | DHS2402 Change Requir_2324_08-24-2023-01-48-32.pdf | DHS2402 Client Responsibilities and Rights | Please review and return for your records | 9/15/2023 2:33:54 PM | Cathy Wassenaar |
| 48  | cathy.wassenaar@nctinc.com | DHS2402 Change Requir_2324_08-24-2023-01-48-32.pdf | DHS2402 Client Responsibilities and Rights |   | 9/15/2023 1:53:42 PM | Cathy Wassenaar |

**Public Portal Shared Docs**

| ID  | Portal ID                  | File Name   | DocType                                    | Instructions and Info                     | Created              | Created By      |
|-----|----------------------------|---|--|---|----------------------|-----------------|
| 121 | cathy.wassenaar@nctinc.com | DHS4163 Client Respo_1402_08-24-2023-01-50-35.pdf | DHS4163 Client Responsibilities and Rights | for your review                           | 9/15/2023 2:51:12 PM | Cathy Wassenaar |
| 98  | cathy.wassenaar@nctinc.com | DHS4163 Client Respo_1402_08-24-2023-01-50-35.pdf | DHS4163 Client Responsibilities and Rights | for your review and file                  | 9/15/2023 2:38:52 PM | Cathy Wassenaar |
| 100 | cathy.wassenaar@nctinc.com | DHS4163 Client Respo_1402_08-24-2023-01-50-35.pdf | DHS4163 Client Responsibilities and Rights | Please review and return for your records | 9/15/2023 2:33:54 PM | Cathy Wassenaar |
| 28  | cathy.wassenaar@nctinc.com | DHS4163 Client Respo_1402_08-24-2023-01-50-35.pdf | DHS4163 Client Responsibilities and Rights |   | 9/15/2023 1:53:42 PM | Cathy Wassenaar |

View documents that have been **Shared** on the Case File Admin tab

### Canceling a Request or Updating Status

County Staff can cancel a request by navigating to the Case File page and selecting the Admin tab. Check the box and click the green **Cancel Request** button. The County Staff will see the Status change to Cancel and this will remove the requested document from the Client’s public portal view.

Documents are retrieved automatically every 15 minutes through the portal. To retrieve the document immediately after Client has uploaded, County staff can manually retrieve instead of waiting for the 15 minutes. In the Admin Tab, select document and click **Update Now**. The document will update to Completed.

**Public Portal Requests**

Can select a 'New' or 'In Progress' document and **Cancel Request** or **Update Now**

| ID  | Portal ID              | File Name   | DocType   | Instructions and Info  | Status      | Completed            | Created              | Created By  |
|-----|------------------------|---|---|--|-------------|----------------------|----------------------|-------------|
| 121 |                        |   | D001 Drivers License (DL) - State ID  |  | New         |                      | 9/21/2023 3:20:17 PM | Dani Gorman |
| 245 | dani.gorman@nctinc.com | DHS0033 Appeal to St_2350_09-21-2023-08-32-34.pdf | DHS0033 Appeal to State Agency  |  | Completed   | 9/21/2023 8:34:52 AM | 9/21/2023 8:32:59 AM | Dani Gorman |
| 244 | dani.gorman@nctinc.com | DHS0033 Appeal to St_2349_09-21-2023-08-21-53.pdf | DHS0033 Appeal to State Agency  |  | Completed   | 9/21/2023 8:23:01 AM | 9/21/2023 8:22:17 AM | Dani Gorman |
| 242 | dani.gorman@nctinc.com | DHS1844 Medical Expe_2346_09-21-2023-07-52-42.pdf | DHS1844 Medical Expenses Request  |  | Completed   | 9/21/2023 7:56:44 AM | 9/21/2023 7:53:46 AM | Dani Gorman |
| 241 | dani.gorman@nctinc.com | DHS1844 Medical Expe_2344_09-21-2023-07-41-46.pdf | DHS1844 Medical Expenses Request  |  | New         |                      | 9/21/2023 7:42:22 AM | Dani Gorman |
| 240 | dani.gorman@nctinc.com | DHS1844 Medical Expe_2342_09-21-2023-07-31-33.pdf | DHS1844 Medical Expenses Request  |  | Completed   | 9/21/2023 7:33:42 AM | 9/21/2023 7:31:58 AM | Dani Gorman |
| 239 | dani.gorman@nctinc.com | DHS0029G Medical Ass_2338_09-21-2023-07-13-08.pdf | DHS0029G Medical Assistance for Families with Children and Adults (MA-FCA) Income Eligibility |  | Completed   | 9/21/2023 7:20:08 AM | 9/21/2023 7:17:20 AM | Dani Gorman |
| 238 | dani.gorman@nctinc.com |   | D000 Birth Certificate (BC)   | Please upload a copy of your Birth Certificate.                | New         |                      | 9/21/2023 7:07:21 AM | Dani Gorman |
| 208 | dani.gorman@nctinc.com | DHS8107 Household Up_2335_09-20-2023-04-09-56.pdf | DHS8107 Household Update Form   | Please fill out and return through the portal as we discussed. | Completed   | 9/20/2023 4:15:35 PM | 9/20/2023 4:11:15 PM | Dani Gorman |
| 187 | dani.gorman@nctinc.com | DHS2146 Authorizatio_1711_07-12-2022-02-21-51.pdf | DHS2146 Authorization for Release of Employment information                                   | Fill out and return back to me end of month.                   | Completed   | 9/20/2023 2:56:07 PM | 9/20/2023 2:49:44 PM | Xou Le Vang |
| 185 | xoule.vang@nctinc.com  | DHS2146 Authorizatio_1348_11-03-2021-09-05-01.pdf | DHS2146 Authorization for Release of Employment information                                   | please send back to me eod 9/19                                | Completed   | 9/20/2023 2:39:29 PM | 9/20/2023 2:36:43 PM | Xou Le Vang |
| 119 | ed.latek@nctinc.com    | DHS2243A General Aut_2297_09-15-2023-02-48-44.pdf | DHS2243A General Authorization for Release of Information                                     |  | In Progress |                      | 9/15/2023 2:49:47 PM | Dani Gorman |

Cancel Request Update Now

## Client Perspective

### Activate Portal Account

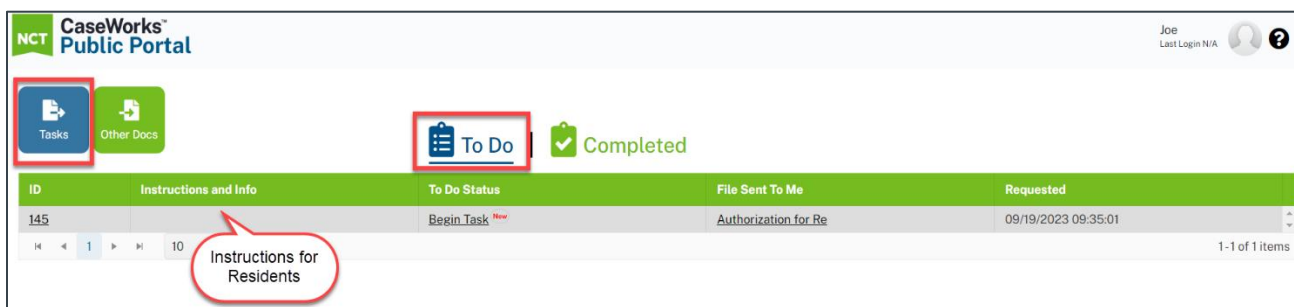
Clients will receive an email to activate their account by clicking on the link. The email subject will read '[CountyName] – New User Registration.'

Upon clicking link in the email, client's username (their email address) and their OTP will auto-populate into the fields. Clients will enter their 10 digit mobile phone number. This must match what the county staff entered when creating the client's account. Client will need to create a new password. After submitting their password, they are redirected to login to the Public Self-Service Portal page with their username and newly created password.

Clients will also receive an Account Activation Completed email.

### Client Portal Perspective

A successful login will bring client to the defaulted **Tasks** tab. The client can use a mobile browser to complete these tasks. However, as some requests are more difficult to complete on mobile devices, Residents are still encouraged to use a computer to fill out larger forms.



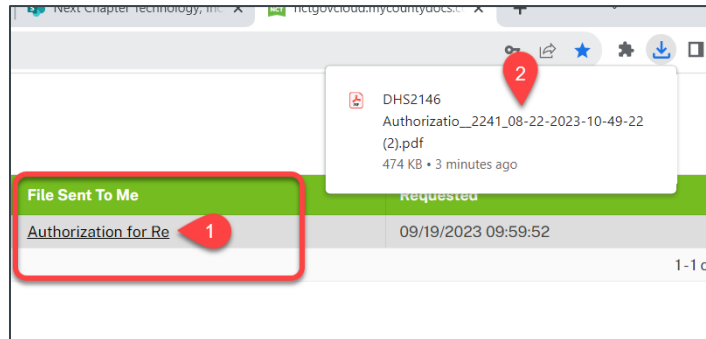
### Tasks

The Tasks tab will have a **To Do** view. This will allow clients to view requesting forms to complete and to upload documents.

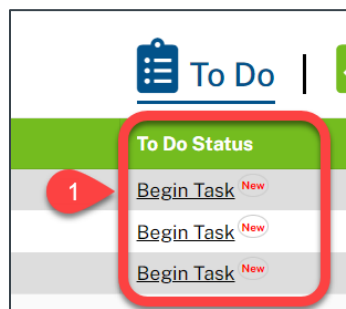
To work on a Requesting Document:

1. Click on file name under "**File Sent to Me**" header. This will download the document for client.

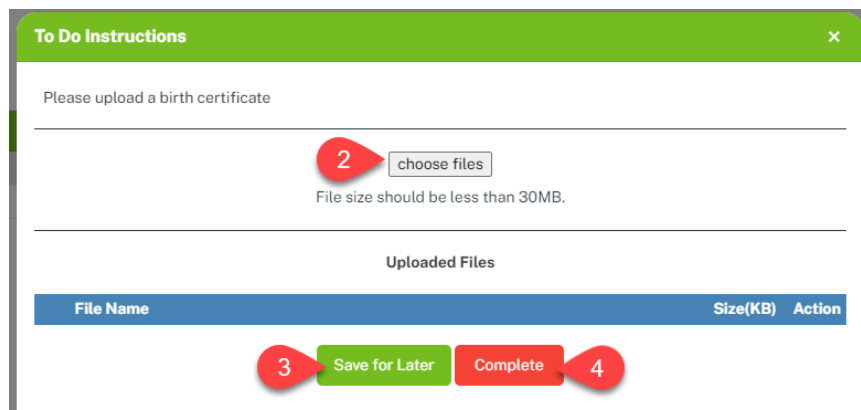
- Go to downloads and click on document to work in PDF or clients may print out document. If the document is printed out, clients may take an image of the completed document to upload or scan the document and upload to Portal account



To upload a document:



- Click on “**Begin Task**”. This will open up the To Do Instructions box
- Click **Choose Files**. This will open file explorer for the client to select their document for uploads
- Clients have the option to upload a document, and click the green **Save for Later** button to return and complete the task later
- Or click the red **Complete** button if client is done uploading documents. A note will let clients know their task is completed



The completed task will be moved to the **Completed** view. Clients may check the **Completed** link to view completed tasks. Clients may download a copy of their uploaded documents for up to 30 days. After 30 days, the Portal will no longer store the files.

| ID  | Instructions and Info  | File Sent To Me      | Requested           | Completed           | Download |
|-----|--|----------------------|---------------------|---------------------|----------|
| 97  |  | Authorization for Re | 2023-09-15 14:35:50 | 2023-09-19 10:36:27 |          |
| 114 | Please look over and sign on page 5  | Medical Service Oues | 2023-09-15 14:47:18 | 2023-09-15 14:49:18 |          |
| 113 | Please fill out page 1 and 2   | Appeal to State Agen | 2023-09-15 14:45:51 | 2023-09-15 14:47:30 |          |
| 98  | Please send birth certificate back to me by end of week. Thank you and have a great day. Please call me if you have any questions. | Birth Certificate (B | 2023-09-15 14:35:50 |                     |          |
| 125 |  | Application for Soci | 2023-09-15 14:58:28 |                     |          |

### Complete Forms in Online PDF Editor

In the Resident Portal perspective, users will have the ability to complete PDF forms in an online PDF viewer.

For non-LCD forms:

1. Click begin/continue task

**CaseWorks Public Portal**

Tasks | Other Docs

To Do | **Completed**

| ID  | Instructions and Info                       | Do Status                                 | File Sent To Me      |
|-----|---|---|----------------------|
| 7   | Please sign updated recert application form | <a href="#">Begin Task</a> <sup>New</sup> | Application Recert F |
| 6   | Please sign                                 | <a href="#">Continue Task</a> 1           | Application Recert F |
| 258 |   | <a href="#">Continue Task</a>             | Verification Request |

Application Recert Form

Page 1 of 1

Save for Later | Complete | Cancel

To Do Instructions (7)

Please sign updated recert application form

**APPLICATION RECERTIFICATION FORM**

I certify that the information on the attached application dated \_\_\_\_\_ remains unchanged as of \_\_\_\_\_

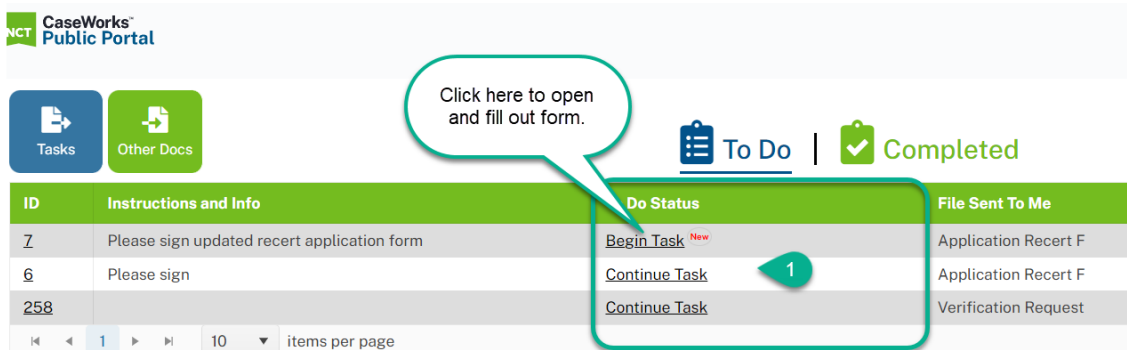
Joe Rockhead 06/03/2024  
Applicant Signature Date

\_\_\_\_\_  
Staff Signature Date

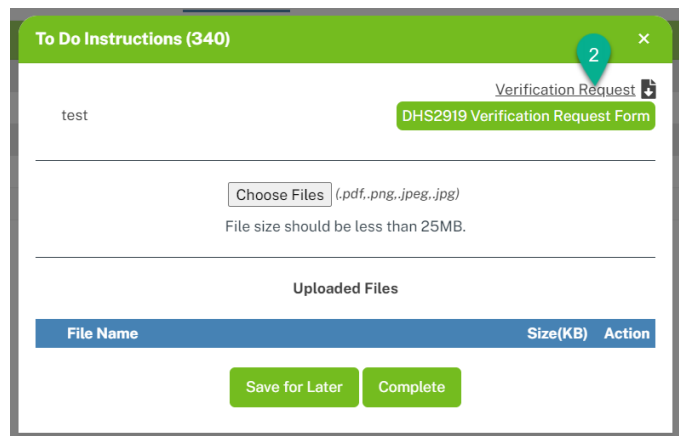
2. User can fill out editable blue fields in the online PDF editor
3. To Do Instructions are displayed in online PDF editor
4. Add signature button is available
5. Click save for later is to come back at another time to fill out the rest of the form
6. Complete button is when user is ready to submit the completed form
7. Cancel button is to discard changes on form and return back to the homepage

**For LCD forms:**

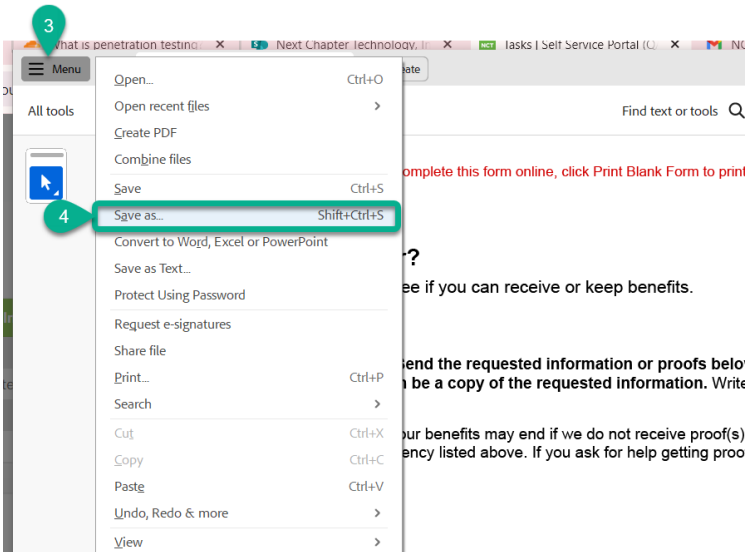
1. Click begin/continue task. A box will open.



2. Click on the upper right corner link to open the LCD form. This will open the form in adobe. Resident should fill out the blue editable fields in adobe or sign document as necessary.

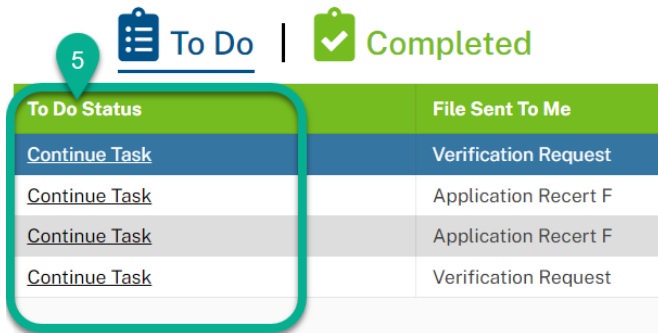


- 3. Click Menu in Adobe.
- 4. Click Save As to save form on computer.

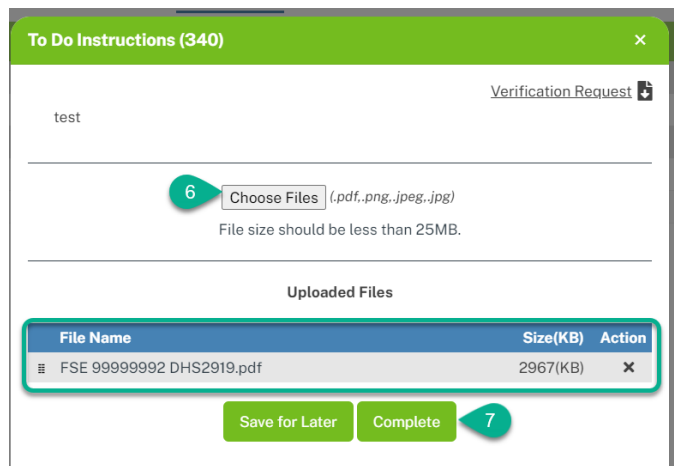


Return to Public Portal account for next steps.

- 5. Click on Continue Task



- 6. Click Choose Files to upload completed LCD form from desktop to portal
- 7. Click Complete to finish task

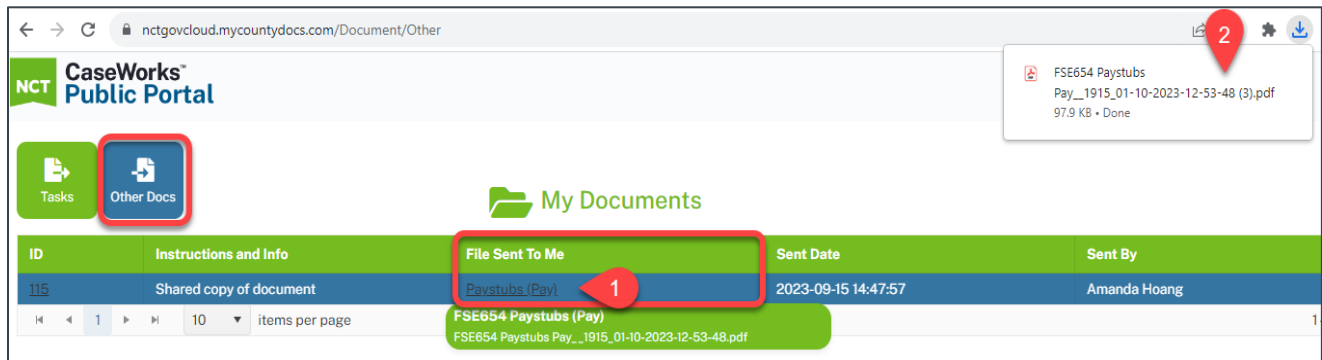


## Other Docs

This tab will show shared information documents from the County Staff. This tab will not require any to do task.

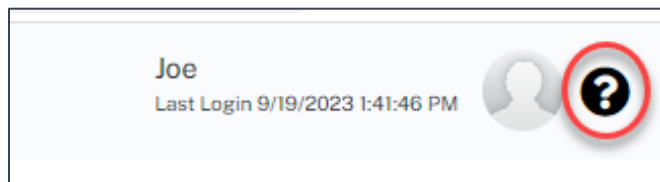
To view shared documents:

1. Click on link under “File Sent to Me” header
2. Open downloads to review or save documents

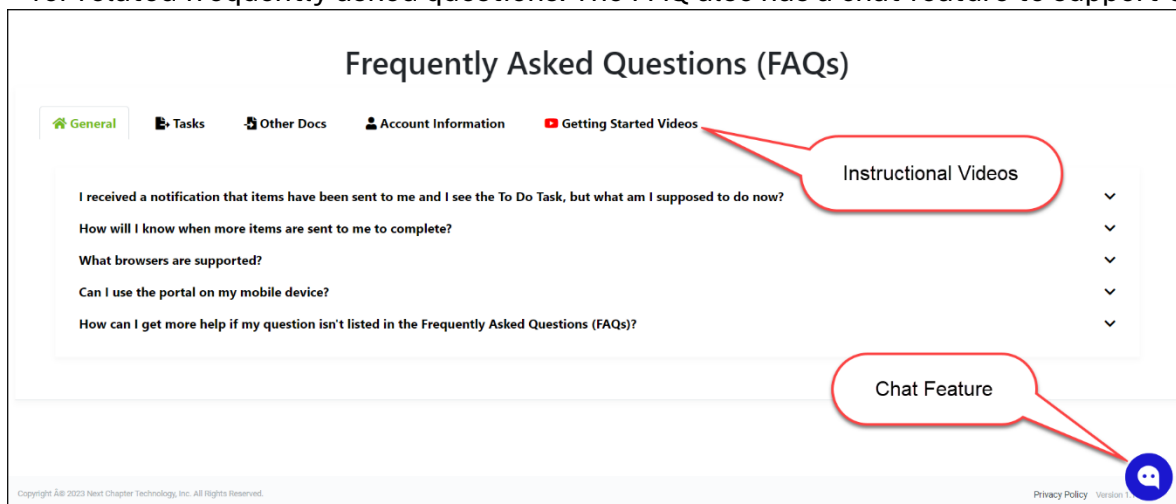


## FAQ

Clients can access frequently asked questions page by clicking on the ? on the upper right corner.



Click through the General, Tasks, Other Docs, Account Information, and Getting Started video tabs for related frequently asked questions. The FAQ also has a chat feature to support clients with



their questions.

