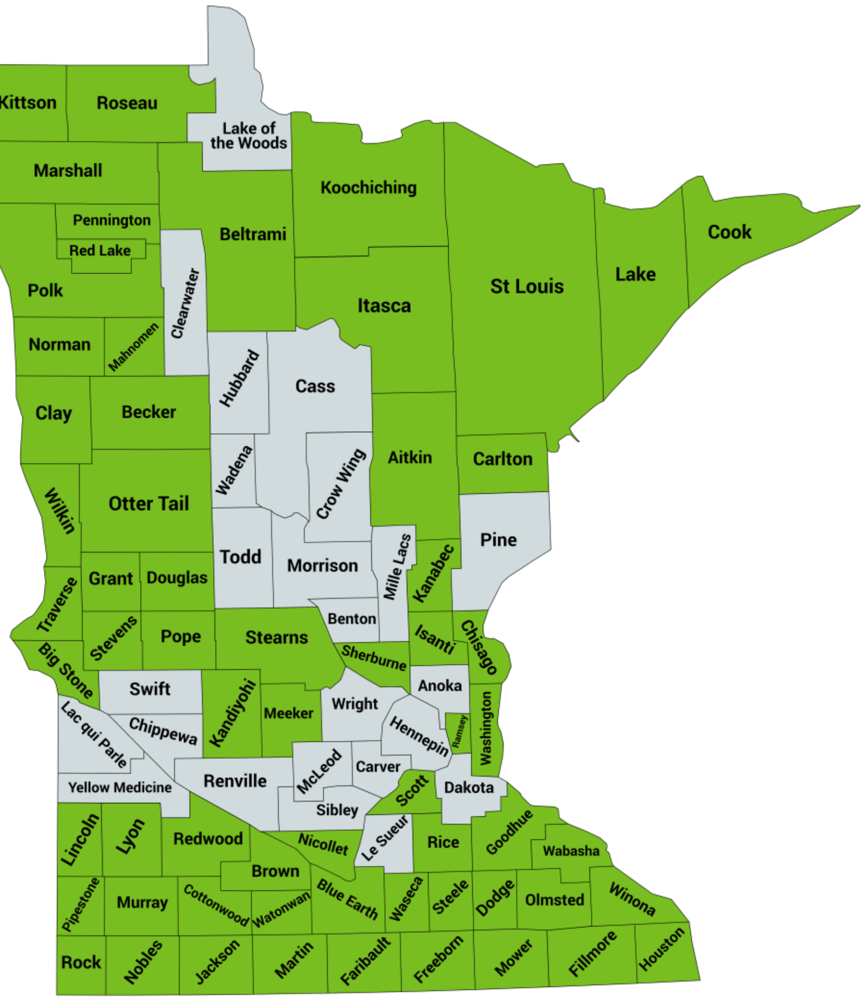
CaseWorks™

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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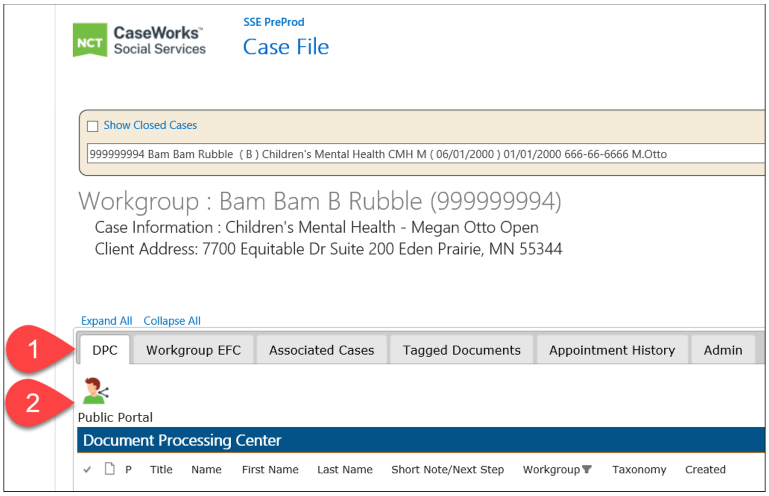
Client Portal

County Staff Perspective

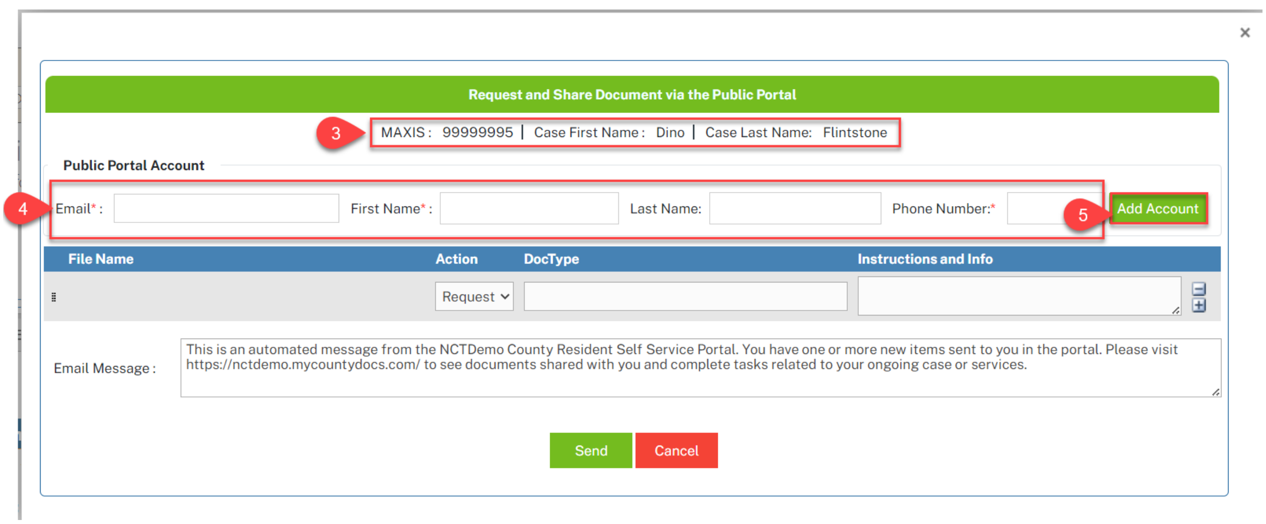
Adding a Portal Account for the Client

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.



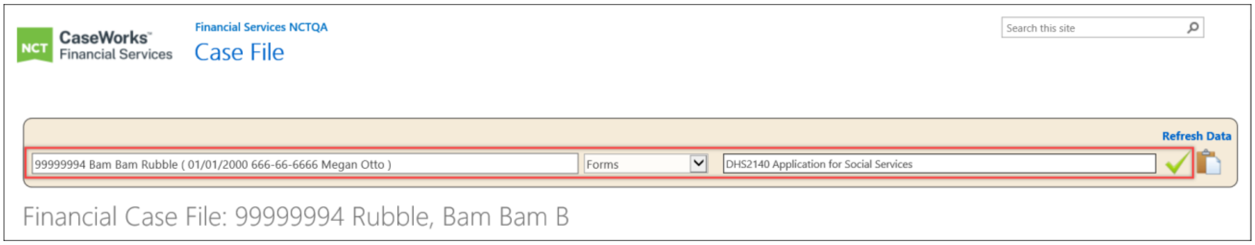
Note: Public Portal requests can be sent to the account even if a client has not completed their account registration yet; documents shared, and requests made will be available to the client once they register.

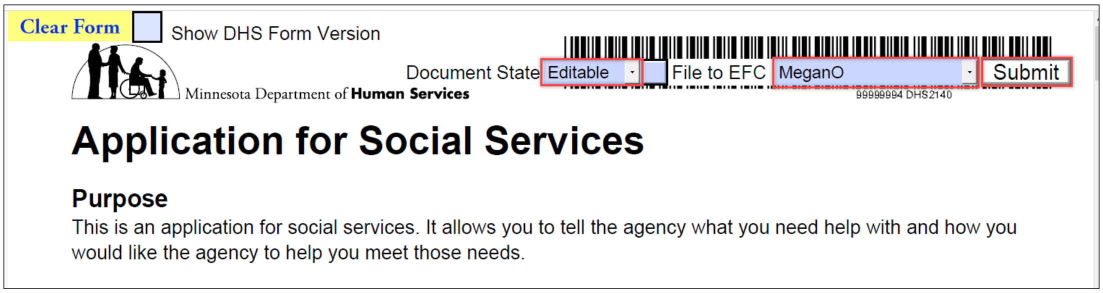
From the screen shown in the picture above, the County Staff can fill out the remaining fields and click 'Send' to send request(s) to the client. For further instructions on sending requests and sharing documents via the Portal, please see our sections below.

Actions: Requesting Documents and Sharing documents

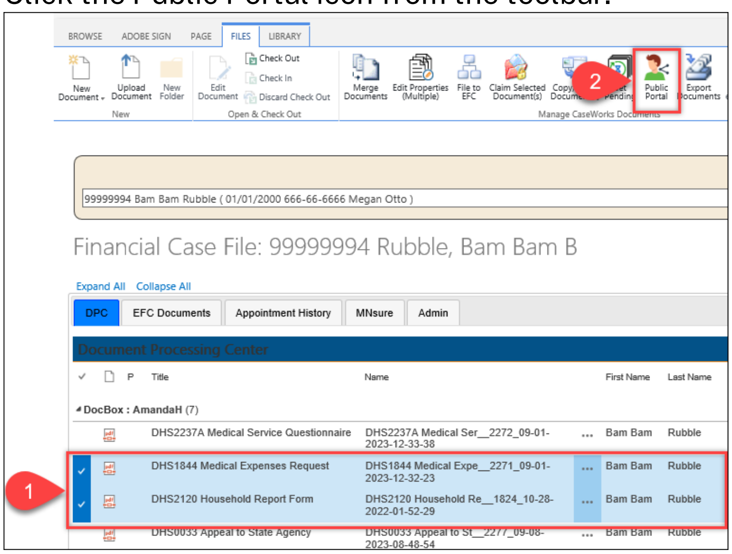
Requesting Forms for Client to Fill Out and Return

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.

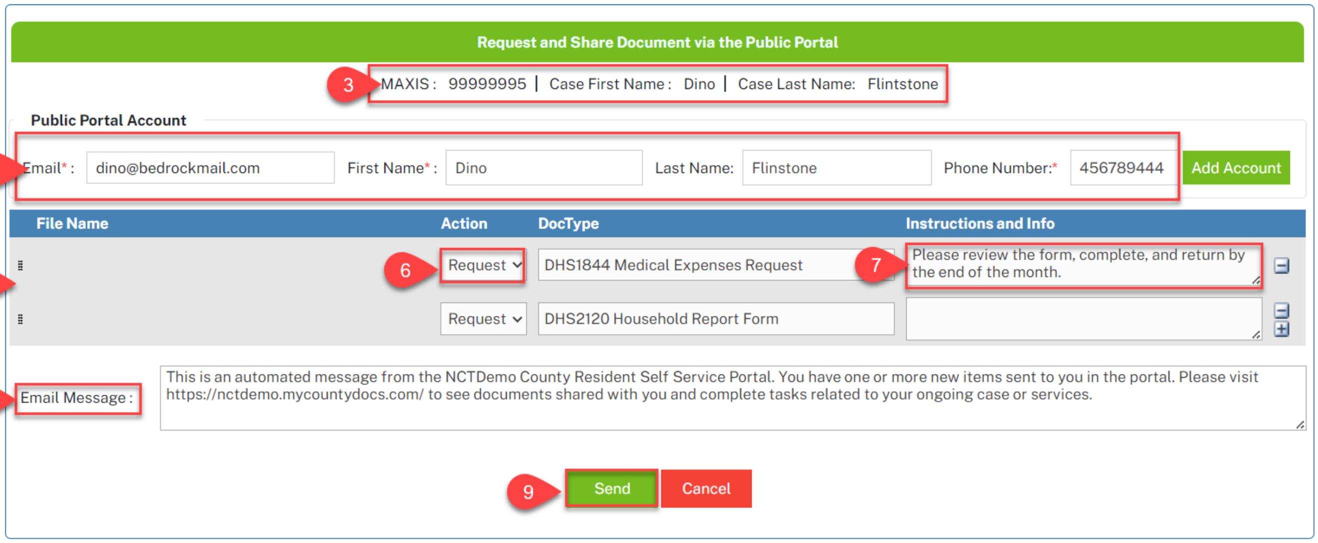




1. From either your homepage DocBox or the DPC tab in the Casefile page, select which form(s) you wish to send to the client to complete and return.
2. Click the Public Portal icon from the toolbar.



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.

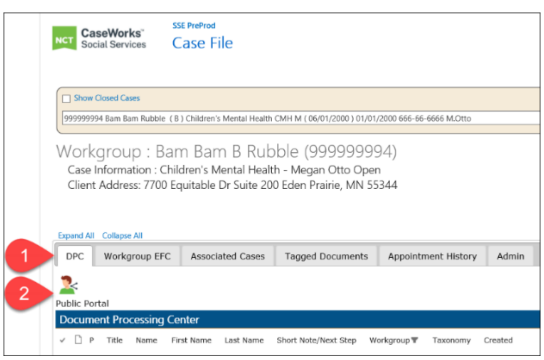


10. After a Public Self-Service Portal request is sent, the document's Short Note/Next Step is updated to "Public Portal – [email address] was sent this on [DateTime].

Requesting Documents for Client to Upload

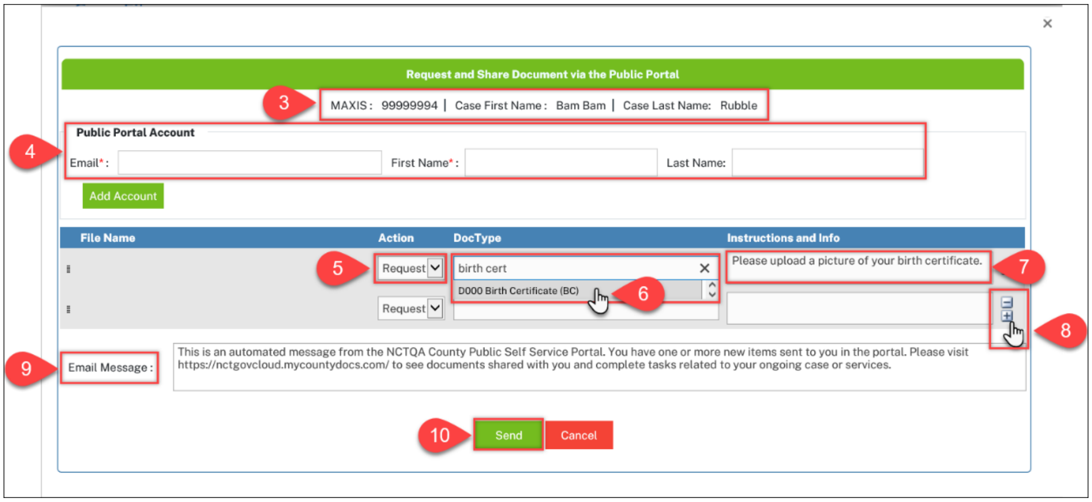
County Staff have the ability to request documents from clients. For example, if a worker needed a client to provide a picture of their birth certificate, pay stubs, etc., this request can be made from CaseWorks through the Portal. To do so, begin by navigating to the client's casefile page.

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.

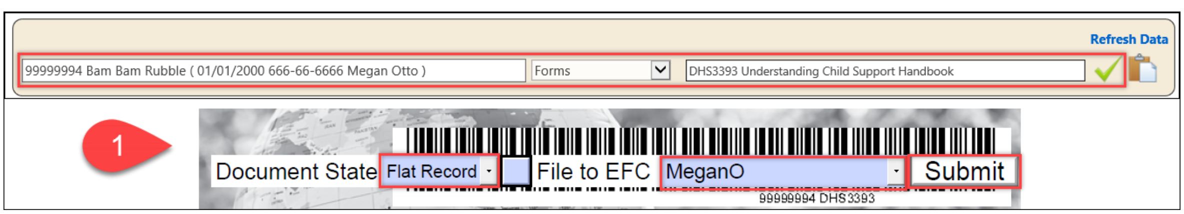
9. The Email Message window populates with the default statement which prompts the client that they have new items to review in the Portal.
10. Click Send.

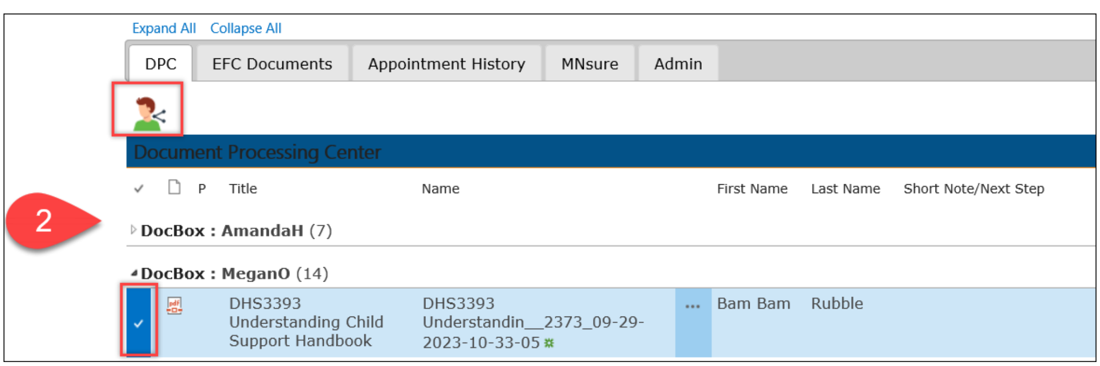


Sharing Documents

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.

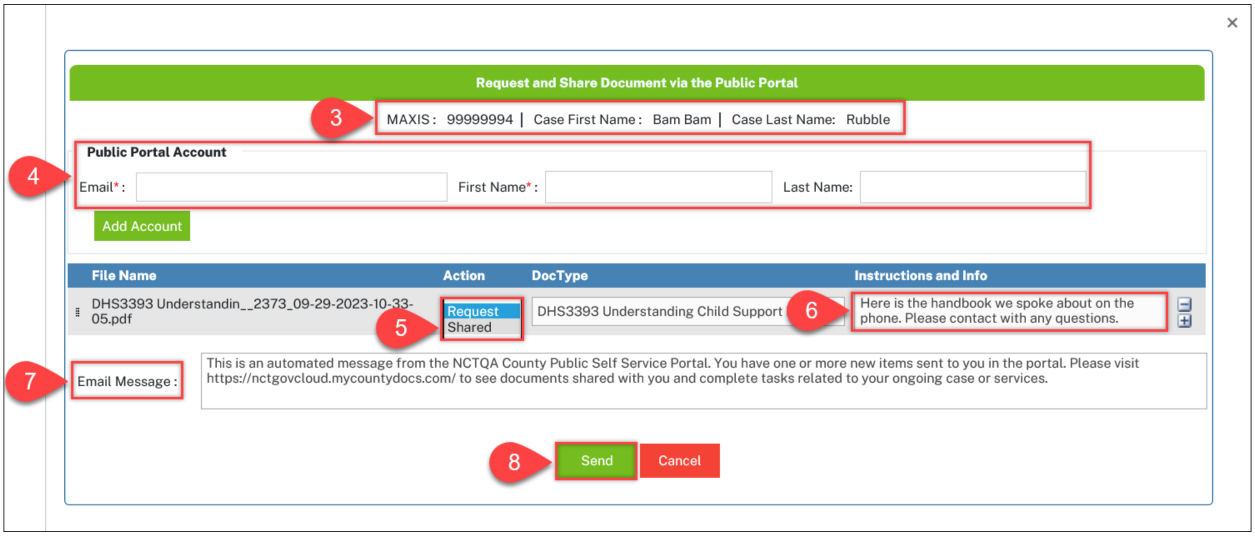
1. Generate the auto-filled form and save as a **Flat Record** to your DocBox or file to the EFC.
    a. If the document is already in CaseWorks, simply navigate to the document in the casefile page.
2. Select the document(s) you wish to share with the client and click the Public Portal icon.





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.



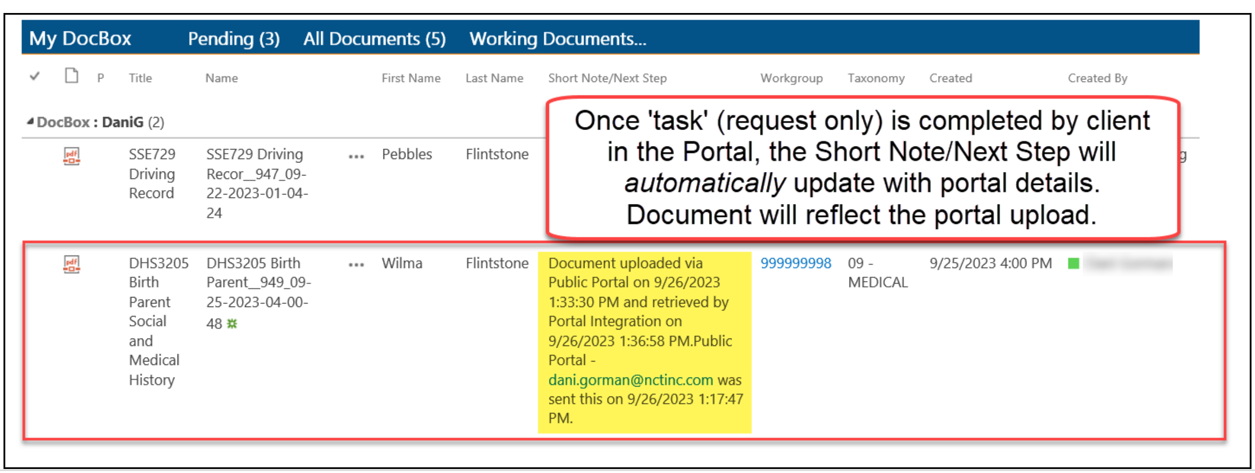
9. After the Shared Document(s) have been sent, the Short Note/Next Step is updated to "Public Portal – [email address] was sent this on [DateTime].

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

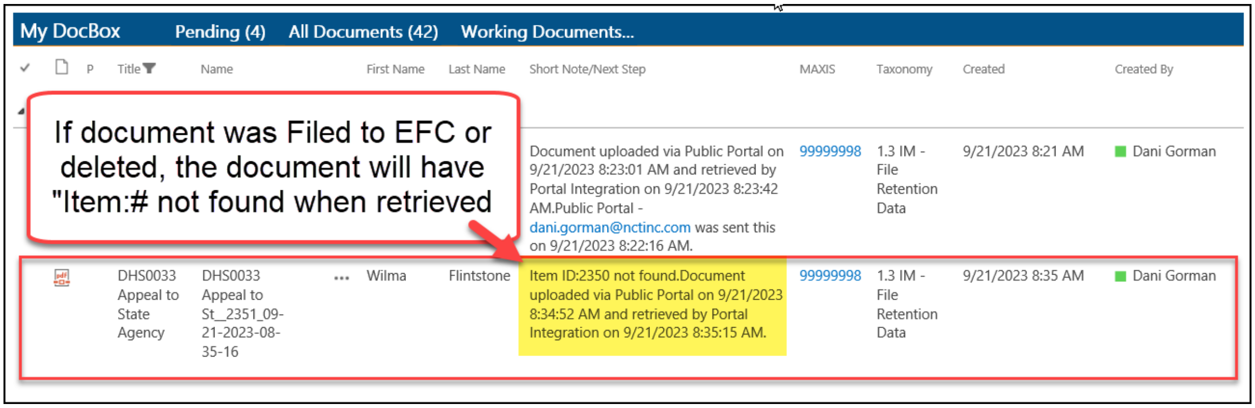
If the requested document remains in a DocBox (Individual or Team), the document submitted by the client will be updated in that DocBox. This includes a Date Stamp is added to the file



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.



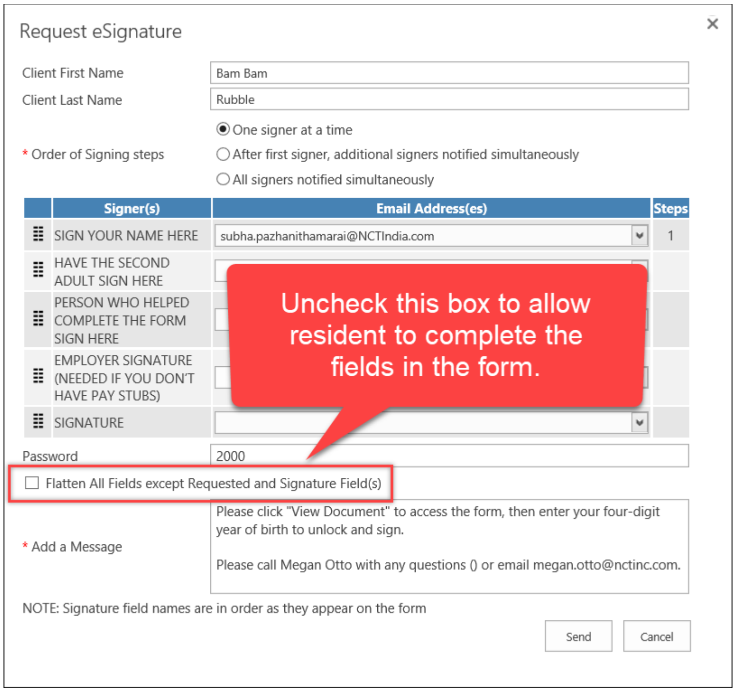
Note: If a Routing Rule is set, the incoming document will route based on routing rule. If Case Banking is present, it will follow Case Banking owner.

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

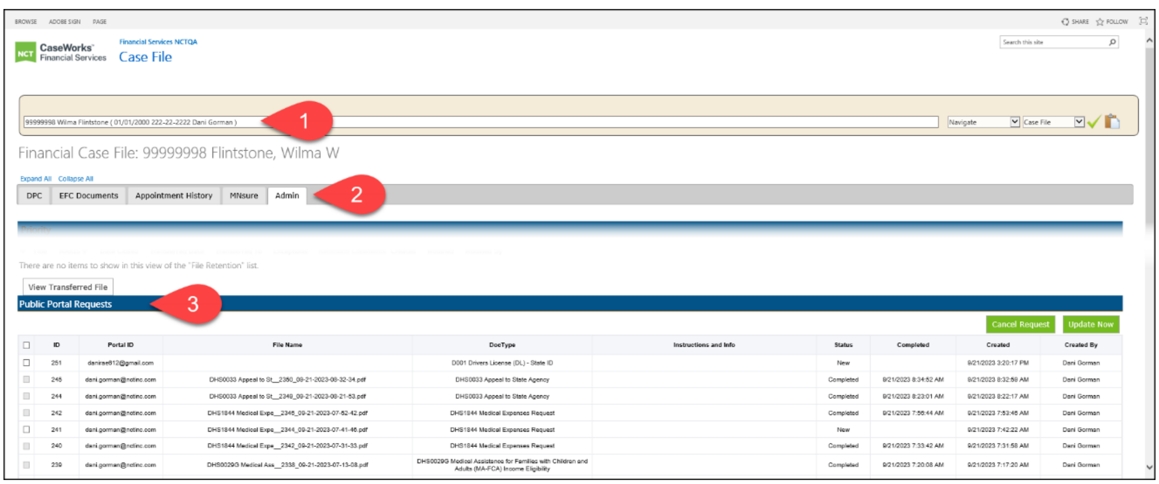
Forms that require signatures should continue to be sent through the integrated CaseWorks eSignature feature to retain signature tracking included in the feature. Forms can be both completed and signed by clients via eSignature by saving the form as editable, and unchecking “Flatten All fields except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



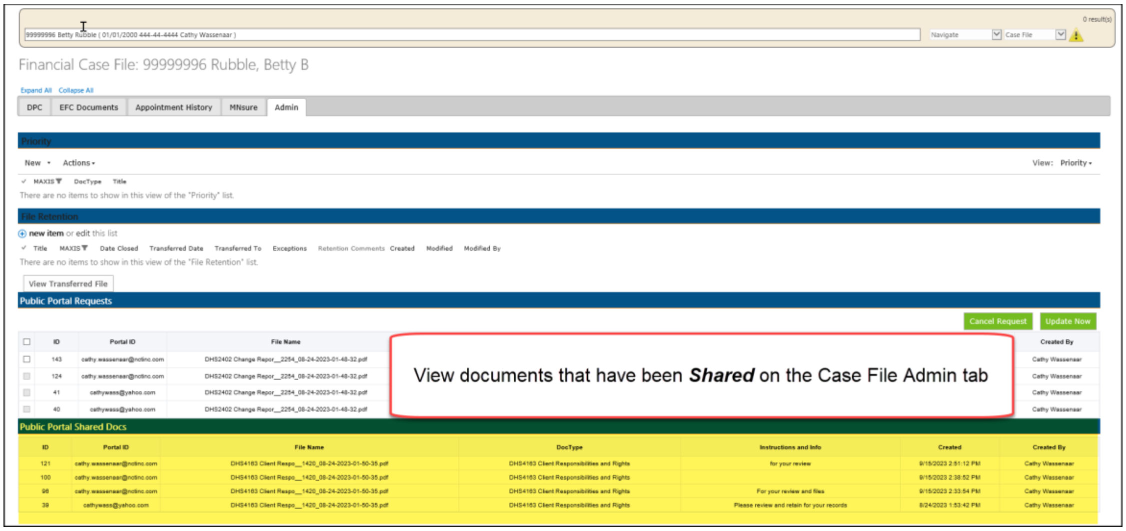
Tracking Public Portal Requests and Shared Documents: Admin Tab

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



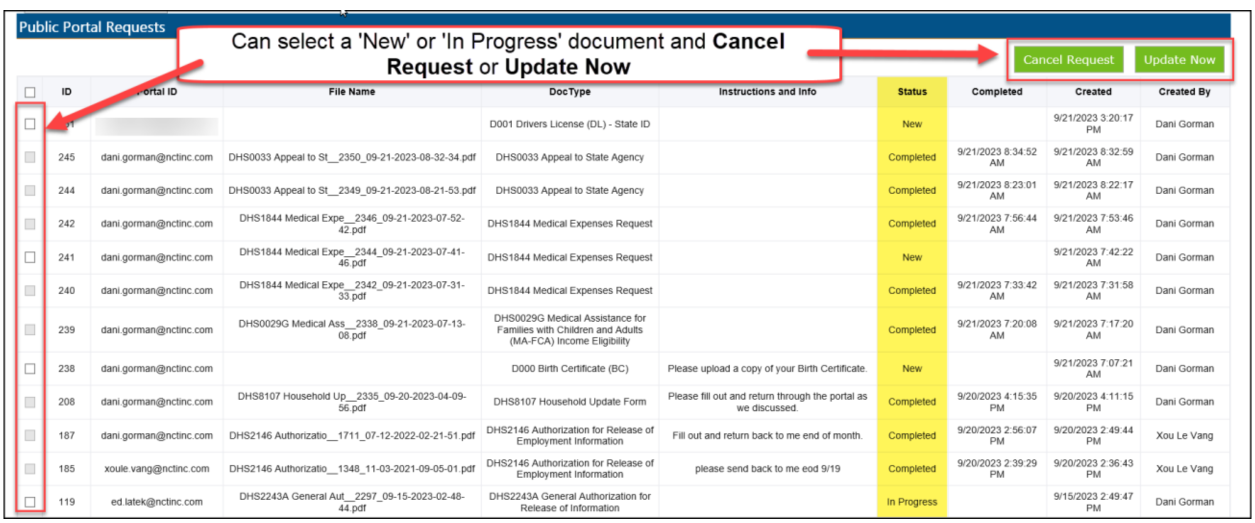
Shared Docs appear under Public Portal Requests.



Cancelling 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.



Client Perspective

Activate Portal Account

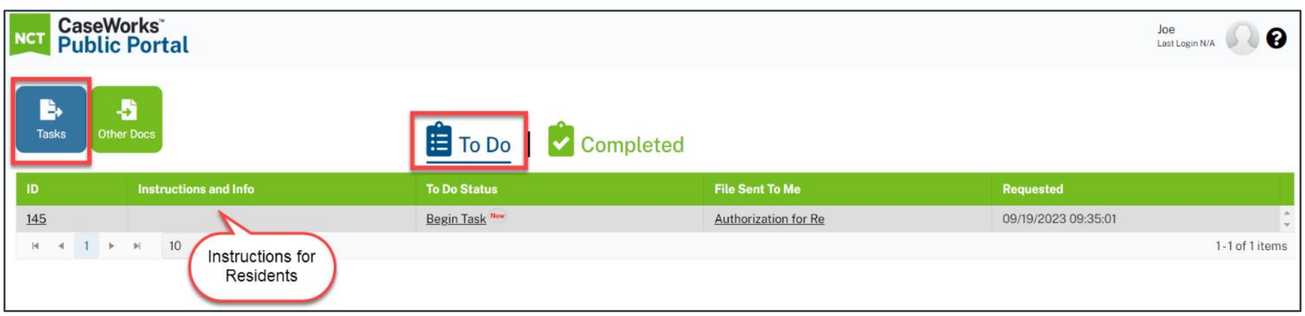
Clients will receive an email to activate their account by clicking on the link. The email subject will read '[CountyName] – New User Registration.'

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.



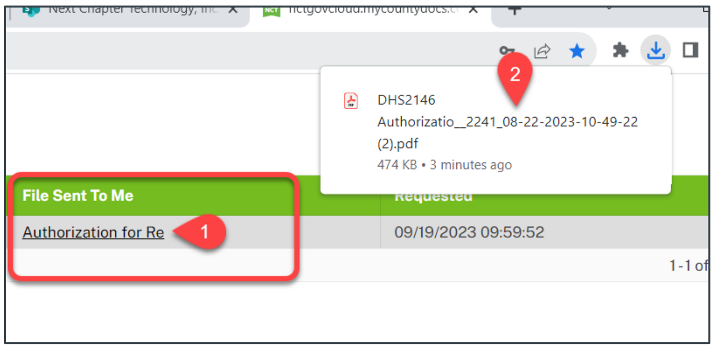
Tasks

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

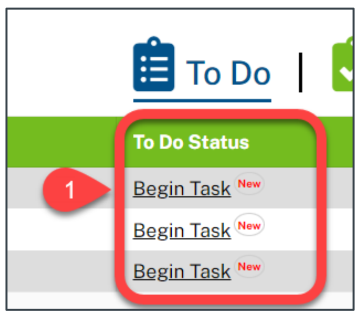
To work on a Requesting Document:

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

2. 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

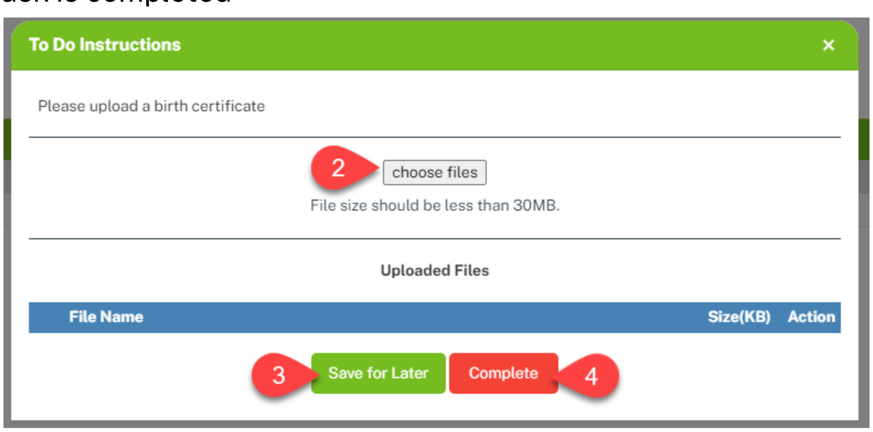


To upload a document:

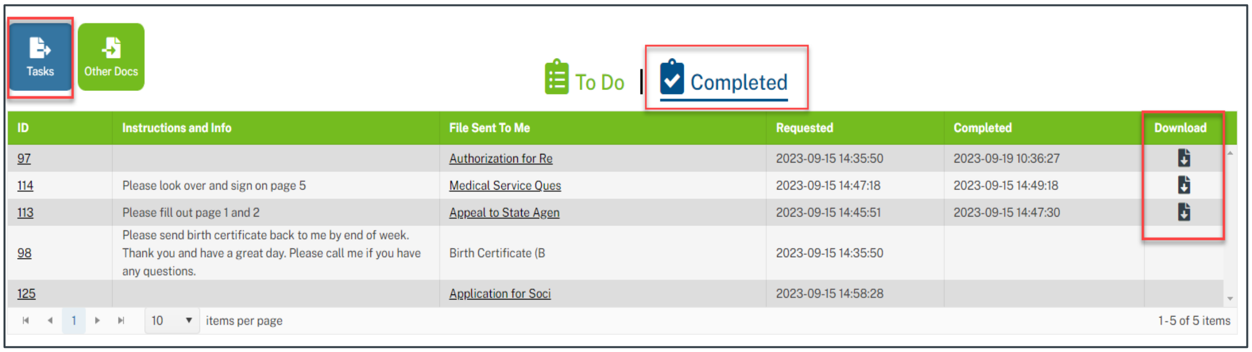


1. Click on "**Begin Task**". This will open up the To Do Instructions box

2. Click **Choose Files**. This will open file explorer for the client to select their document for uploads
3. Clients have the option to upload a document, and click the green **Save for Later** button to return and complete the task later
4. 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.

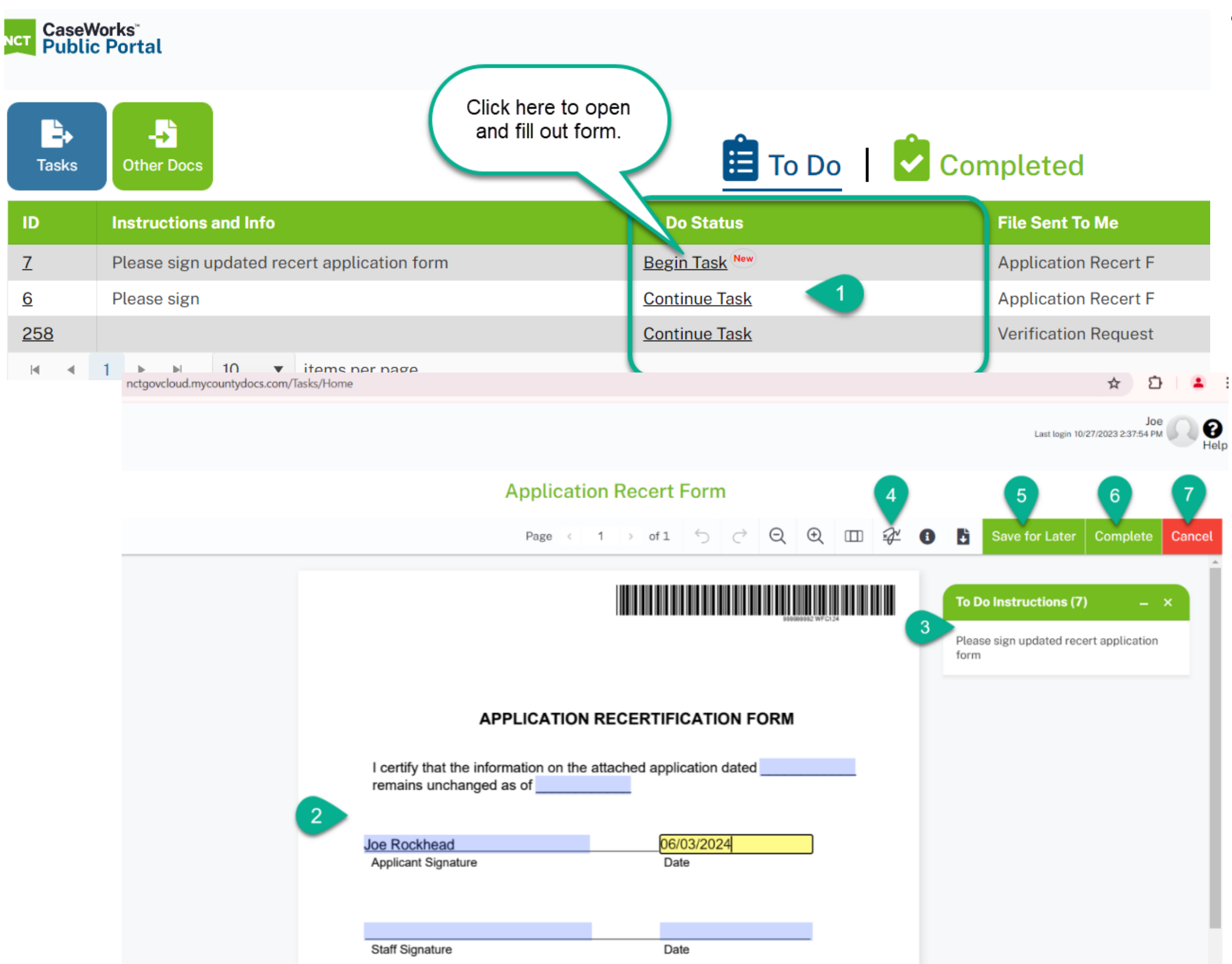


Complete Forms in Online PDF Editor

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

<u>For non-LCD forms:</u>

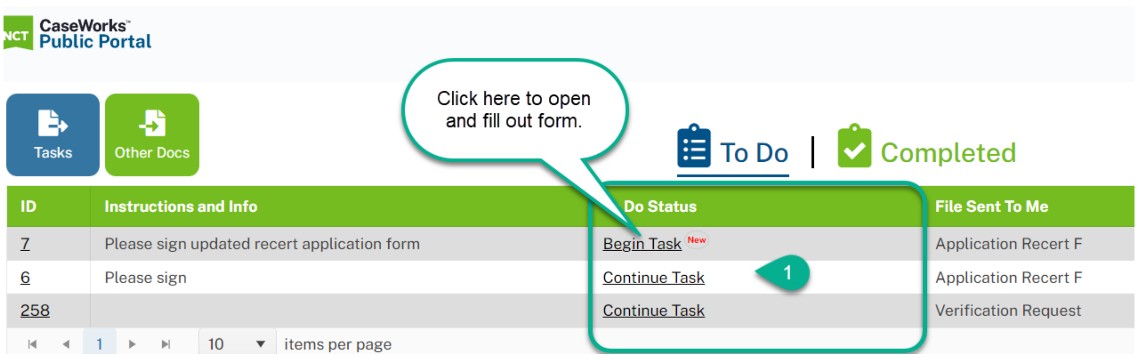
1. Click begin/continue task



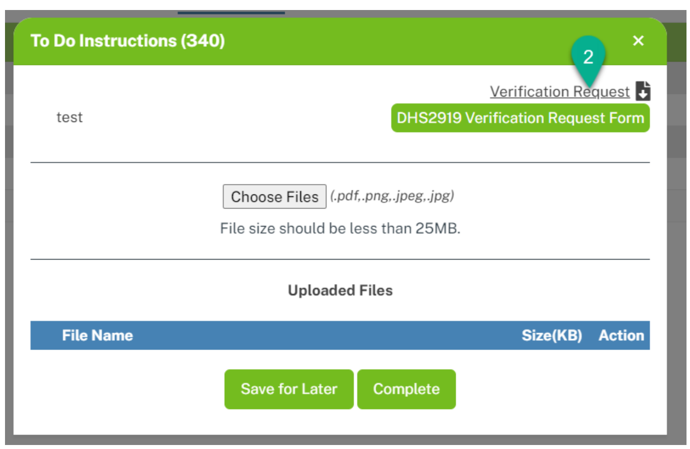
2. User can fill out editable blue fields in the online PDF editor
3. To Do Instructions are displayed in online PDF editor
4. Add signature button is available
5. Click save for later is to come back at another time to fill out the rest of the form
6. Complete button is when user is ready to submit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

For LCD forms:

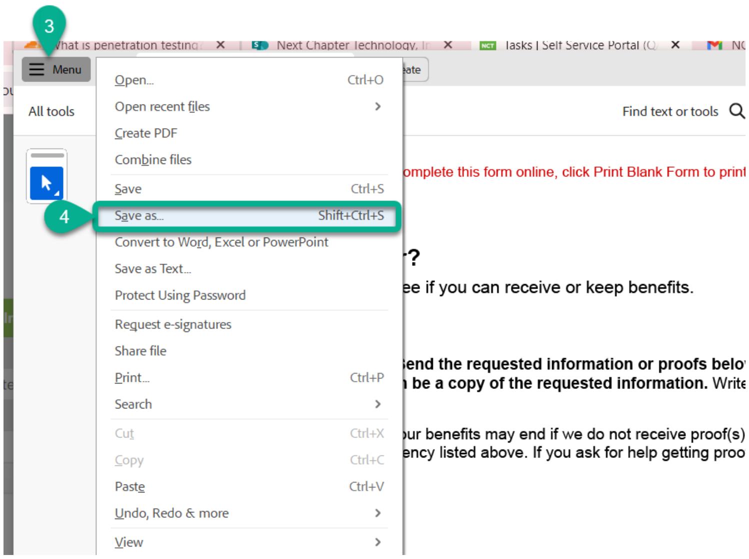
1. Click begin/continue task. A box will open.



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.

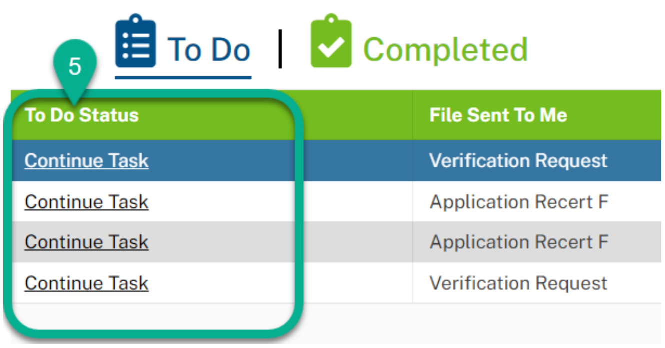


3. Click Menu in Adobe.
4. Click Save As to save form on computer.

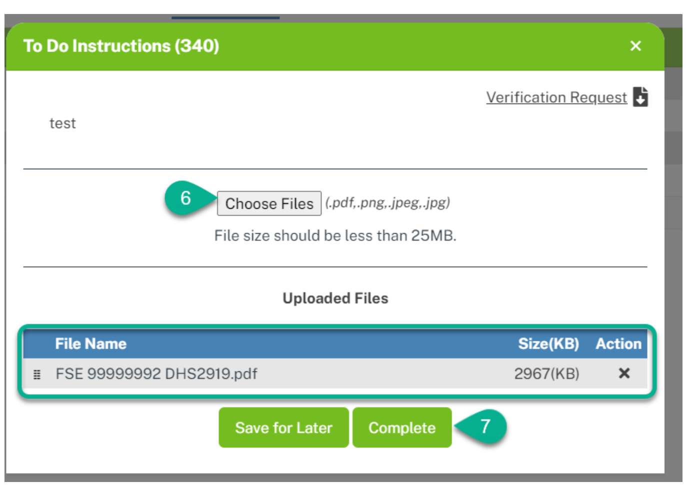


Return to Public Portal account for next steps.

5. Click on Continue Task



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

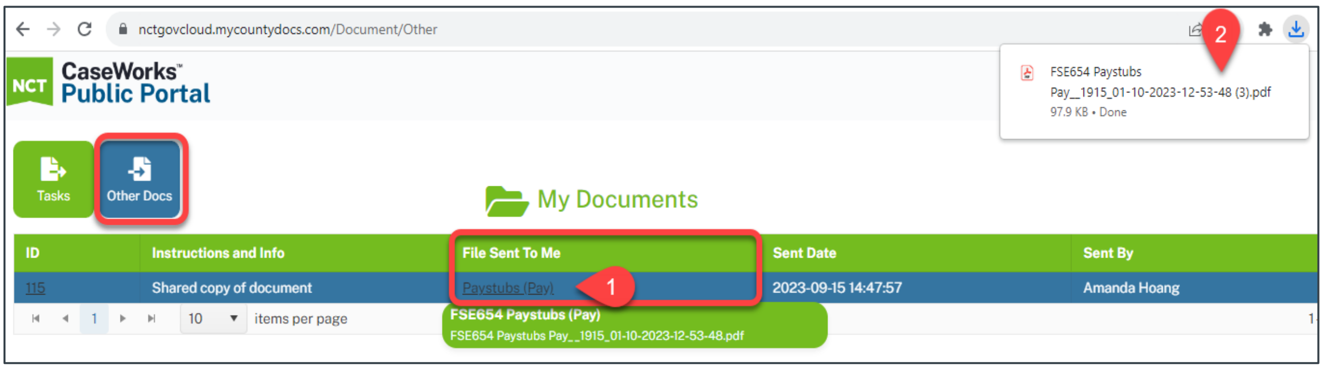


Other Docs

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

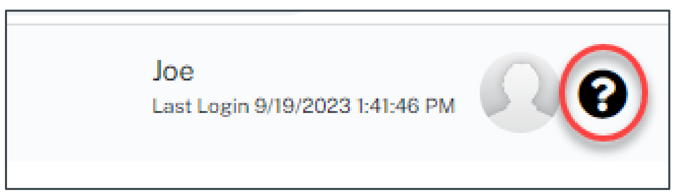
To view shared documents:

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



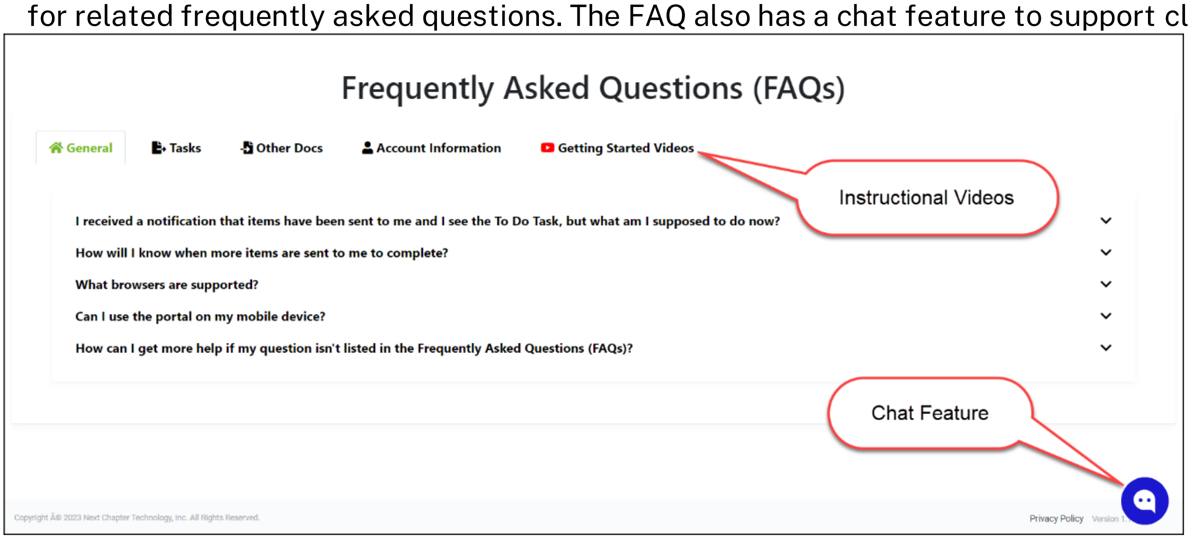
FAQ

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.