

# Clerical and Office Support Staff Tips and Tricks

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September 2025

# Agenda

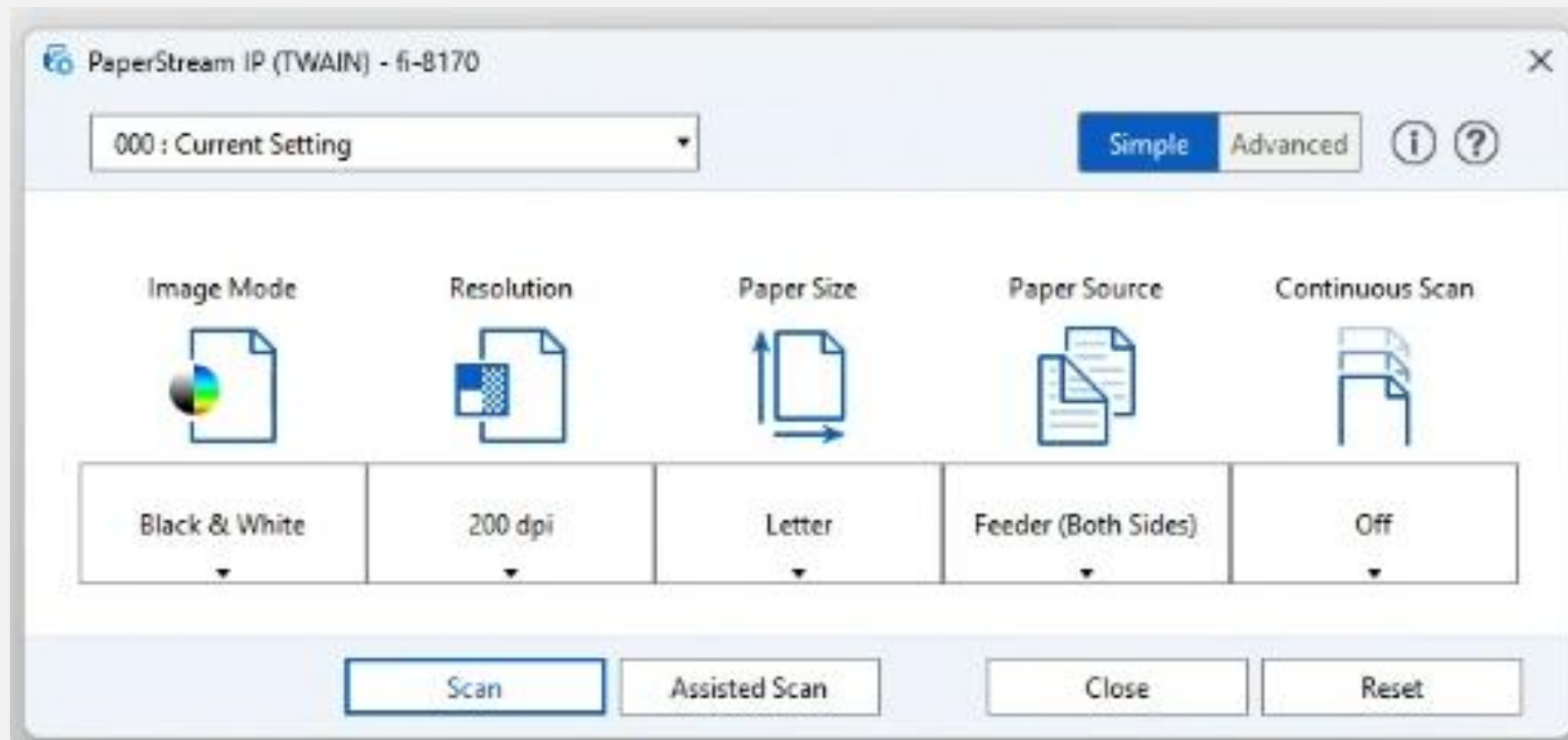
- Capturing Documents
  - Scanning, Uploading, and Dragging and Dropping into scan interface
  - Send Copy To and Copy/Move
  - Splitting
- Locating Documents
- Common processes and features used by clerical teams
  - Case Transfers
  - Outgoing Mail
  - Potential DocSet uses
- Note for 'CurrentGen' and 'NextGen' CaseWorks features

# OSS/Clerical – Capturing Documents

## Capturing documents

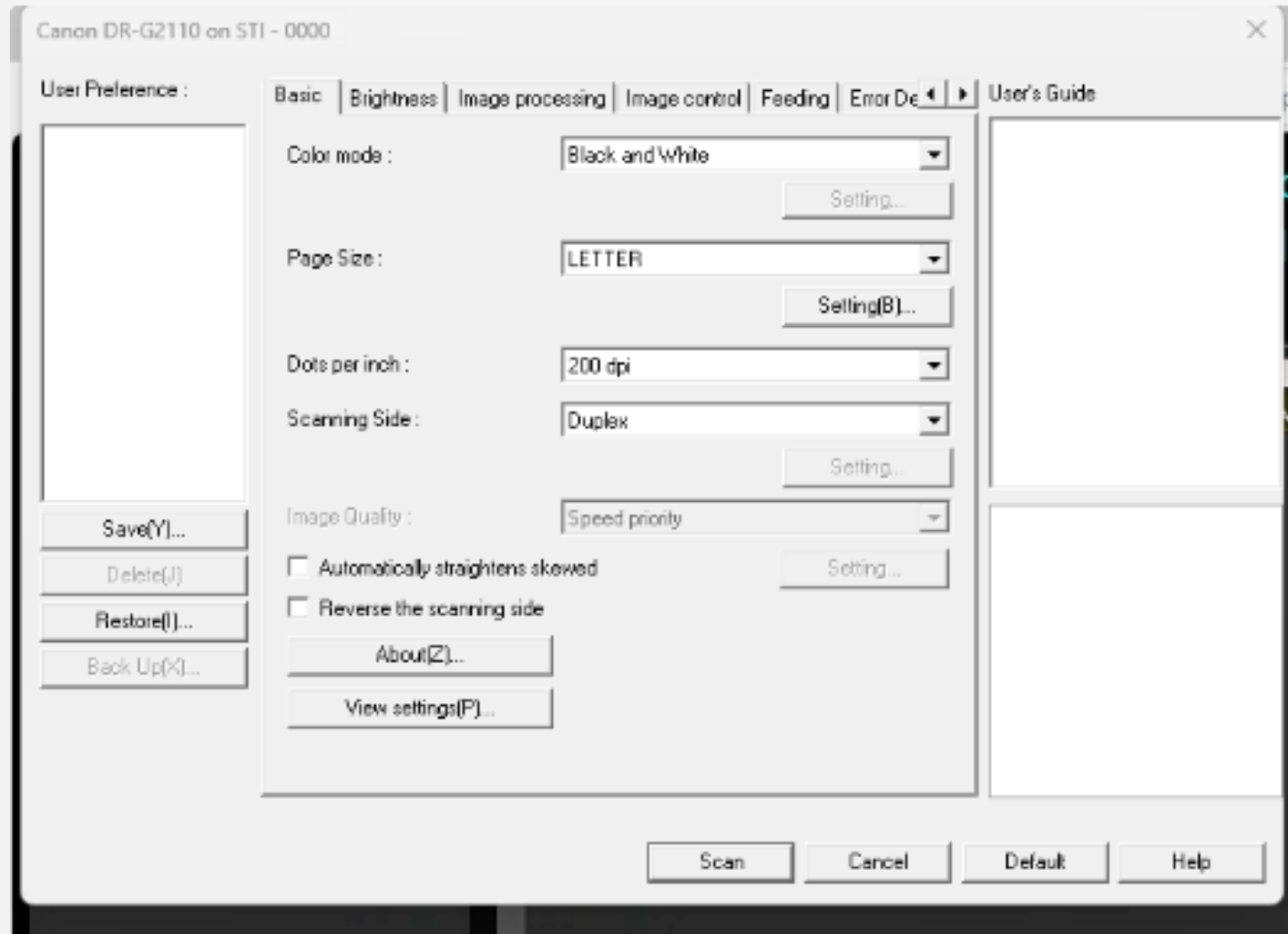
- Scanning
  - Scan Settings:
    - 000: Current Settings
      - Keep settings as is
      - Automatically pick up double-sided documents
      - Automatically pick up black and white documents or color documents
  - Scanning in color D009 Color - Other
    - Paystubs, ID's (DL, birth certificate, passport, etc.), and utility bills are defaulted to color
  - Date Received Stamp
    - Flattened on the document
    - Date Received Column on homepage
  - Auto Date Stamp after saving

# Fujitsu-8170 Twain Driver



# Canon Twain Driver

NCT



## Scan to DocBox or Other Editions

- Scan directly to a DocBox within same Edition
  - DB [space] name
- Send Copy To
  - Need to have access to other edition
    - Case number field may change
    - DocBox and DocType may be empty
- Copy/Move
  - To same edition or other editions
  - Does not need access to other edition

## Bulk Scanning and Splitting

- Bulk scan (or upload/drag and drop) multiple documents
- Split documents
  - Zoom in or zoom out to view thumbnail pane preference
  - Order documents correctly
  - Update Case Number field (MAXIS, PRISM, Integrated Case, WF1CaseID, Vendor Number, and Workgroup)
  - Split
  - Repeat until ready to save last document

## Left Navigation Panel (LNP)

- Form ID Taxonomy List
  - Can be exported to Excel for easier filtering/sorting
- Scan Barcode Document
  - For scanning in CaseWorks generated forms
  - CaseWorks Barcodes display the case number and form number

Show DHS Form Version

Document State

99999999 SBF106

## Locating Documents

- Document Discovery
- Recent EFC
- Casefile page
- Checking on documents in real time:
  - Portal: Admin Tab> 'Update Now'
  - eSignature: DPC> DocBox> eSign Documents> Get Status

## DocSet Examples for Clerical Teams

- EBT Transmittals
- Returned Mail
- Vendor Requests

# Case Transfers and Exporting Documents

- **Case Transfers (FSE and CSE)**
  - CaseWorks to CaseWorks County Transfers
    - How to identify if a County uses CaseWorks
    - Note for CCAP
    - Retrieving transferred/deleted documents via Admin Tab
  - CaseWorks to non-CaseWorks County Transfer
  - File Retention Records
- **Export Documents**
  - Select desired document(s)
  - Choose Export documents
  - View exported documents in browser Downloads
  - Note for Counties with “Legacy” version of CaseWorks
- **Additional Case Transfer Resources:**
  - [Case Transfers](#)
  - [Case Transfers - CSE Specific](#)

# Outgoing Mail

- Monitor Outgoing Mail
  - Short Note Next Step
  - Open, print, mail documents
    - Blank Forms and Packets Checklist

Outgoing Mail DocBox DocSet											
✓	P	Title	Name		First Name	Last Name	Short Note/Next Step	MAXIS	Taxonomy	Created	D
▲ DocBox : Outgoing Mail (22)											
		Merge For Mailing (Delete after Mailing or Printing)	Merge For Mailing D_1908_07-25-2025-10-58-26	...	Dino	Flintstone		99999995		7/25/2025 10:58 AM	7,
		Merge For Mailing (Delete after Mailing or Printing)	Merge For Mailing D_1915_07-28-2025-09-59-37	...	Bam Bam	Rubble	AES can delete after printing - thanks!	99999994		7/28/2025 9:59 AM	7,



# Resources

Knowledge Base

- [NCT CaseWorks](#)

User Manuals

- [CaseWorks User Manuals](#)

Advanced Training Recordings/Agendas

- [Advanced Trainings](#)

# Sharing Screen from Teams Browser

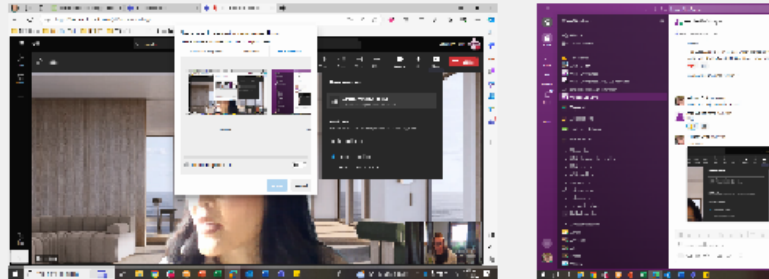
## Choose what to share with teams.microsoft.com

The site will be able to see the contents of your screen

Microsoft Edge tab

Window

3 Entire Screen



Screen 1

Screen 2

4 or

Also share system audio



5

Share

Cancel

A screenshot of the Microsoft Teams interface. The top navigation bar includes icons for Raise, React, View, More, Camera, Mic, and Share. The 'Share' icon is highlighted with a blue circle and the number '1'. A 'Share content' menu is open, showing options: 'Screen, window, or tab' (highlighted with a blue circle and the number '2'), 'Excel Live', and 'No files available'. Below 'No files available' are options for 'Browse OneDrive' and 'Browse my computer'. A red 'Leave' button is visible in the top right corner.

Raise

React

View

More

Camera

Mic

Share

Leave

### Share content



Screen, window, or tab

Choose what you want to share

### Excel Live

Share a workbook for everyone to work on together.

No files available

Browse OneDrive

Browse my computer

# Sharing Screen from Teams App

