

United Way of the Mid-South

Driving the Dream

CaseWorthy User Guide



Referral Network Partners

May 2020

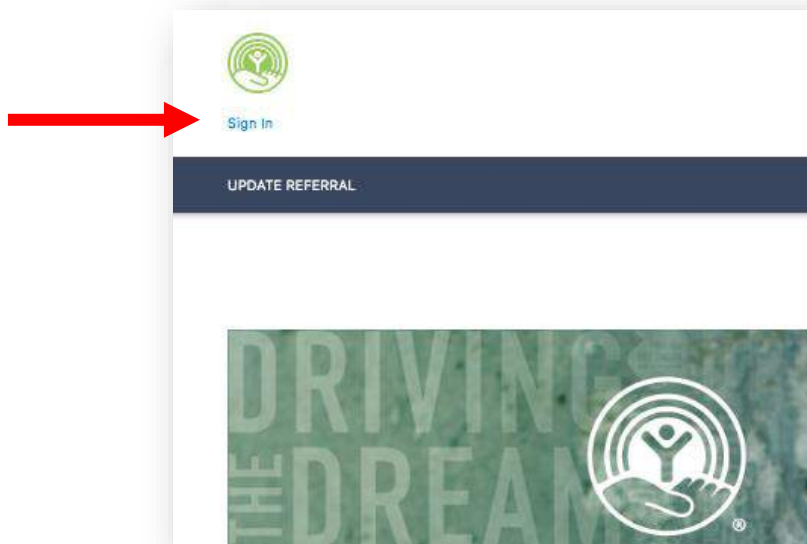
Table of Contents

Navigating the CaseWorthy Portal	3
Logging into the Portal	3
Symbols	5
Referral Dashboard	6
Open Referrals	7
Referrals Accepted Pending Outcome	10
All Referrals Sent and Received	13
Upcoming Events	16
Add a New Client	17
Client Demographics	17
Check for Duplicates	21
Address Lookup	23
Contact Information	25
Adding Family Members	28
Client Web Portal	32
Client Dashboard	34
Finding Existing Clients	34
Navigating the Client Dashboard	35
Client Dashboard - Menu Selections	37
Client Referrals	41
View Client Service Area Scores	45
Add a New Client Referral – Existing DTD Agencies	46
Add a New Client Referral – Out-of-Network	59
Add a New Client Referral – Referral for a Minor	62
Assess a Client	63
View Client Assessments	68
Agency Profile	70
Agency Capacity and Eligibility	72
Out-of-Network Agencies	73
Update a Referral	73

Navigating the CaseWorthy Portal

Logging into the Portal

- *The Driving the Dream CaseWorthy Portal can be accessed at https://app.caseworthy.com/UnitedWayMidSouth_prod.portalnew*




- *In the upper left-hand corner of the screen, click the button labeled 'Sign In' to proceed to the sign in page.*

Registered Sign In

[Forgot Password ? Need Help ?](#)

- ***At the Registered Sign In screen, type in your username and password and click 'Log In'. If you do not have a username, please contact a Driving the Dream staff member for assistance. If you have lost or forgotten your password, click 'Forgot Password?' to generate a password reset.***




[ADD CLIENT](#) [FIND CLIENT](#) [REFERRAL DASHBOARD](#) [AGENCY PROFILE](#) [AGENCY CAPACITY AND ELIGIBILITY](#)


Welcome, Demo User | [Log Out](#) | My Agency: UWMS Demo Provider

Referrals Accepted Pending Outcome


Client Name	Referral Date	Referral Status	Status Date	Service Requested
CLIENT, TEST	04/30/2020	Completed/Enrolled in Program	05/04/2020 8:58 AM	Childcare Referral



Menu



All Referrals Received



All Referrals Sent

Upcoming Events

Event	Date	Type
Training Day	04/23/2020	UWMS Work Events

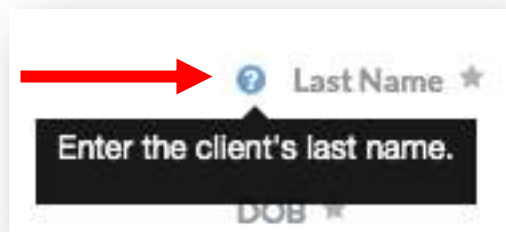
- ***After successfully logging in, you will see a screen similar to the one above. The default page after logging in is the Referral Dashboard.***

Symbols

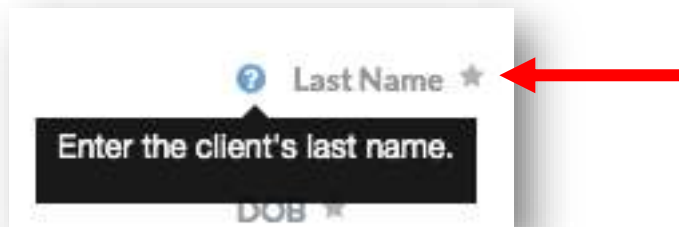
- *Throughout the CaseWorthy platform, there are several visual cues built in to assist navigation.*

💡 Identifying Information Information about the identity of the client

- *The light bulb proceeds text describing the purpose of the form currently in view.*

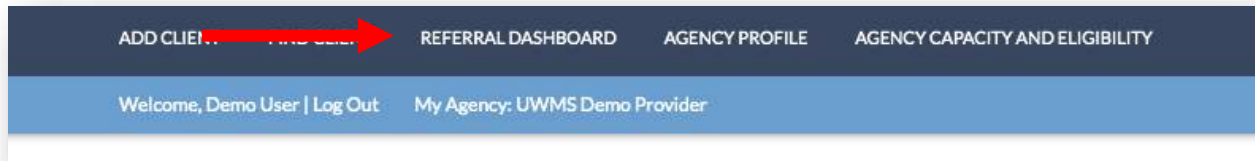


- *When you hover your cursor over the question mark symbol, a text pop-up appears with more information about that field.*



- *The star denotes a required field when completing a form.*

Referral Dashboard



- **To add view the Referral Dashboard, click the 'Referral Dashboard' button located on the top navigational bar.**

Open Referrals Received

Client Name	Referral Date	Referral Status	Last Update	Service Requested	Received From
CLIENT, TEST	05/07/2020 4:08 PM	Sent	05/07/2020 3:08 PM	Childcare Referral	Catholic Charities Care Coordination
CLIENT, TEST	05/07/2020 4:43 PM	Sent	05/07/2020 3:44 PM	Childcare Referral	Neighborhood Christian Centers Care Coordination
CLIENT, TEST	05/08/2020 6:05 PM	Sent	05/08/2020 5:06 PM	Childcare Referral	Out of Network
Test, Candace	05/12/2020 9:44 PM	Sent	05/12/2020 8:46 PM	Childcare Referral	UWMS Demo Provider

Open Referrals Sent

Client Name	Referral Date	Referral Status	Last Update	Service Requested	Referred To
Test, Candace	05/12/2020 9:44 PM	Sent	05/12/2020 8:46 PM	Childcare Referral	UWMS Demo Provider

Referrals Accepted Pending Outcome

Client Name	Referral Date	Referral Status	Status Date
CLIENT, TEST	04/30/2020	Completed/Enrolled in Program	05/04/2020 8:58 AM

Menu

All Referrals Received

All Referrals Sent

Upcoming Events

Event	Date	Type
Training Day	04/23/2020	UWMS Work Events

- **The Referral Dashboard is snapshot of your Agency's referrals received, referrals sent, and upcoming events. The referral dashboard is the landing page after you initially login to CaseWorthy.**

Open Referrals

Open Referrals Received					
Client Name	Referral Date	Referral Status	Last Update	Service Requested	Received From
CLIENT, TEST	05/07/2020 4:08 PM	Sent	05/07/2020 3:08 PM	Childcare Referral	Catholic Charities Care Coordination
CLIENT, TEST	05/07/2020 4:43 PM	Sent	05/07/2020 3:44 PM	Childcare Referral	Neighborhood Christian Centers Care Coordination
CLIENT, TEST	05/08/2020 6:05 PM	Sent	05/08/2020 5:06 PM	Childcare Referral	Out of Network
Test, Candace	05/12/2020 9:44 PM	Sent	05/12/2020 8:46 PM	Childcare Referral	UWMS Demo Provider

Open Referrals Sent					
Client Name	Referral Date	Referral Status	Last Update	Service Requested	Referred To
Test, Candace	05/12/2020 9:44 PM	Sent	05/12/2020 8:46 PM	Childcare Referral	UWMS Demo Provider

- ***Open referrals are referrals that have not reached a finalized status and still require status updates. Open referrals will appear in the ‘Open Referrals Received’ and ‘Open Referrals Sent’ sections of the Referral Dashboard. When a referral is initially created, the ‘Referral Status’ will be set as ‘Sent’.***

Open Referrals Received					
Client Name	Referral Date	Referral Status	Last Update	Service Requested	Received From
CLIENT, TEST	05/07/2020 4:08 PM	Sent	05/07/2020 3:08 PM	Childcare Referral	Catholic Charities Care Coordination

- ***Referrals Received are referrals that have been sent to your agency from another agency.***

Open Referrals Sent					
Client Name	Referral Date	Referral Status	Last Update	Service Requested	Referred To
Test, Candace	05/12/2020 9:44 PM	Sent	05/12/2020 8:46 PM	Childcare Referral	UWMS Demo Provider

- ***Referrals Sent are referrals that your agency has sent out to other agencies.***

Open Referrals Received					
Client Name	Referral Date	Referral Status	Last Update	Service Requested	Received From
CLIENT, TEST	05/07/2020 4:08 PM	Sent	05/07/2020 3:08 PM	Childcare Referral	Catholic Charities Care Coordination

- ***To update the status of an open referral received or an open referral sent, click on the row containing the referral.***

	Select Client			
Service	Care Coordination Referral	Referred From	United Way of the Mid-South	
Referral Status	Sent	Referral Date	05/11/2020	
Refer To UserID	<input type="text"/> <input type="button" value="Q"/>	Referral ID	11046	

- ***The referral form for that referral will appear. You cannot make edits to most fields on the completed referral form, with the exception of 'Referral Status'. See 'Add a New Client Referral' for more information about the referral form.***

This screenshot shows a portion of a web form. At the top is a blue button labeled 'Select Client'. Below it are several input fields: 'Service' (containing 'Childcare Referral'), 'Referral Status' (a dropdown menu currently showing 'Sent'), 'Refer To UserID' (empty), 'Provider Information' (a link with a lightbulb icon), 'Provider' (empty), 'City' (empty), and 'Phone' (containing '901-433-4863'). The 'Referral Status' dropdown menu is open, displaying a list of options: '--Nothing--', 'Sent', 'Warm Hand-Off', 'Received', 'At Capacity', 'Pending - In Contact', and 'Pending - Screening for Enrollment'. A red arrow points from the left towards the 'Referral Status' label.

- **To update the status of the referral, select the 'Referral Status' drop down list and select the appropriate referral. A referral is considered finalized when it reaches a status of 'Completed/Enrolled in Program', 'Ineligible', 'Unable to Contact', or 'Contacted but Declined Services'. Once a referral is updated to a finalized status, that referral will no longer appear in the 'Open Referral' section of the Referral Dashboard.**
- **After selecting a new referral status, click 'Save' in the lower left hand corner of the form.**

This screenshot shows a wider view of the referral form. At the top left is a blue button labeled 'Select Client', which is highlighted by a red arrow pointing from the left. Below the button are two columns of input fields. The left column contains 'Service' (containing 'Care Coordination Referral'), 'Referral Status' (a dropdown menu showing 'Sent'), and 'Refer To UserID' (empty with a search icon). The right column contains 'Referred From' (containing 'United Way of the Mid-South'), 'Referral Date' (containing '05/11/2020'), and 'Referral ID' (containing '11046').

- **At the top of the Client referral form, there is a 'Select Client' button. This button will select this Client and take you to the Client Dashboard. See 'Client Dashboard' for more information.**

Service	Care Coordination Referral	Referred From	United Way of the Mid-South
Referral Status	Sent	Referral Date	05/11/2020
Refer To UserID	<input type="text"/> <input type="button" value="Q"/>	Referral ID	11046

- ***The referral form contains a record of the 'Referral ID' as display only.***

Referrals Accepted Pending Outcome

Referrals Accepted Pending Outcome				
Client Name	Referral Date	Referral Status	Status Date	Service Requested
CLIENT, TEST	04/30/2020	Completed/Enrolled in Program	05/04/2020 8:58 AM	Childcare Referral

- ***If a referral received by your agency reaches a status of 'Completed/Enrolled in Program', it will appear in the 'Referral Accepted Pending Outcome' section of the Referral Dashboard. Referrals in this section require a second service area score. See 'Add a New Client Referral' for more information about service area scores.***

Referrals Accepted Pending Outcome				
Client Name	Referral Date	Referral Status	Status Date	Service Requested
CLIENT, TEST	04/30/2020	Completed/Enrolled in Program	05/04/2020 8:58 AM	Childcare Referral

- ***To update a referral accepted pending outcome, click on the row containing the referral.***

Click Update Score to update the service area score

[Update Score](#) Service Area Childcare


Referral Score Last Score (all sources) 0

Score Description N/A

Score Date 05/07/2020 09:45 p Scored By Sanders, Candace

- **The client referral form will appear. On the bottom third of the form, an ‘Update Score’ button will appear next to the service area.**

Click Update Score to update the service area score

 [Update Score](#) Service Area Childcare

Referral Score Last Score (all sources) 0

- **To update the score of the referral, click the ‘Update Score’ button.**

Area 7 07. Childcare

Question	Yes	No
Are there any children in the household who are 14 years old or younger?	<input checked="" type="radio"/>	<input type="radio"/>
Does the client have access to some form of childcare?	<input type="radio"/>	<input type="radio"/>
Does the client have access to reliable and affordable childcare?	<input type="radio"/>	<input type="radio"/>
Can the client access high quality childcare?	<input type="radio"/>	<input type="radio"/>
Can client select any type of childcare without a subsidy?	<input type="radio"/>	<input type="radio"/>

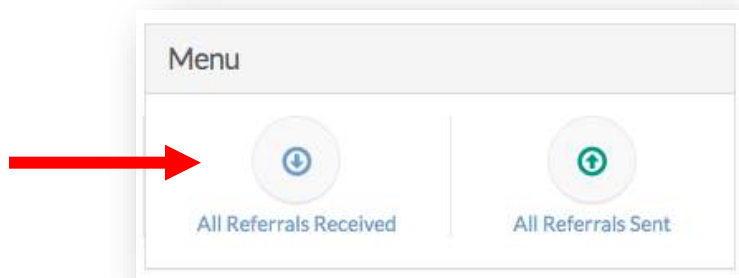
Score Values:
Total Sum: 0.00

- ***A new window will appear with the relevant service area scores questions. See 'Add a New Client Referral' for more information about service area scores.***

All Referrals Sent and Received



- ***The 'Menu' section of the Referral Dashboard allows you to view the complete history of referrals for your agency, regardless of the status of a referral. That history is divided by referrals received and referrals sent.***



- ***To view your agency's complete history of referrals received, click the 'All Referrals Received' button. All features of 'All Referrals Received' are available in 'All Referrals Sent'.***

Referrals : To 'UWMS Demo Provider'

Select Client Service Area

Referral Date through

Referral Status Finalized

Total Rows: 6

	REFERRAL DATE	CLIENT	SERVICE AREA	REFERRAL SCORE	LAST SCORE (ALL SOURCES)	LAST SCORE DATE	REFERRED FROM AGENCY	REFERRED TO AGENCY	REFERRAL STATUS
⚙	5/12/2020 12:00:00 AM	Test, Candace	Childcare	0	0	5/13/2020	UWMS Demo Provider	UWMS Demo Provider	Contacted But Declined Services
⚙	5/12/2020 12:00:00 AM	Test, Cassandra	Childcare	4	4	5/12/2020	UWMS Demo Provider	UWMS Demo Provider	Completed/Enrolled in Program

- ***A table will appear that lists all referrals in order of most recent referral date.***

Referrals : To 'UWMS Demo Provider'

Select Client Service Area

Referral Date through


Referral Status Finalized

- ***To filter the table, use the fields available above the table. You can filter the table by searching for a specific client, the service area associated with the referral, the date of the referral, the status of the referral, and whether the referral has reached a finalized status.***

Total Rows: 6

Q Search

	REFERRAL DATE	CLIENT	SERVICE AREA	REFERRAL SCORE	LAST SCORE (ALL SOURCES)	LAST SCORE DATE	REFERRED FROM AGENCY	REFERRED TO AGENCY	REFERRAL STATUS	F
			Childcare	0	0	5/13/2020	UWMS Demo Provider	UWMS Demo Provider	Contacted But Declined Services	Y


 View History
 Edit

- **To edit a referral, click the gear in the left column of the table and select 'Edit'. You will then be taken to the referral form. See 'Open Referrals' for more information on updating a referral.**
- **To view the history of a referral, click the gear in the left column of the table and select 'View History'.**

Client: Test, Candace

To Provider: UWMS Demo Provider

Program: Demo - Childcare

Referral Date: 05/12/2020

ProviderReferralID: 11057

Total Rows: 7

DATE	BY USER	FOR PROVIDER	REFERRAL STATUS	SERVICE AREA	SCORE	SCORE DATE	REFER TO USER
5/12/2020 10:06 PM	User, Demo	UWMS Demo Provider	Contacted But Declined Services	Childcare	0	5/12/2020	
5/12/2020 10:06 PM	User, Demo	UWMS Demo Provider	Contacted But Declined Services	Childcare	0	5/12/2020	

- **A table containing the history of the referral will appear. This history includes all status updates and any changes made to the referral.**

Upcoming Events

Upcoming Events		
Event	Date	Type
Training Day	04/23/2020	UWMS Work Events

- ***The 'Upcoming Events' section of the Referral Dashboard contains a table of events created by the United Way of the Mid-South. Events may include meetings, trainings, and holidays.***

Add a New Client



- ***To add a new client, click the 'Add Client' button located on the top navigational bar.***
- ***You will now begin the 'Add Client' Workflow.***

Client Demographics

A screenshot of a web form titled 'Identifying Information Information about the identity of the client'. The form contains several input fields for client demographics: 'Last Name' (text input), 'First Name' (text input), 'DOB' (date input with a calendar icon), 'Age' (text input), 'Gender' (dropdown menu), 'Primary Language' (dropdown menu with 'English' selected), 'Race' (dropdown menu with 'Choose Options...' selected), and 'Ethnicity' (dropdown menu). A blue button labeled 'Check For Duplicates' is located in the center of the form.

- ***The required client demographics include first and last name, date of birth, gender identification, primary language, race identification, and ethnicity.***

The screenshot shows a form titled "Identifying Information Information about the identity of the client". It contains fields for "Last Name", "DOB", "Gender", and "Race". The "DOB" field is highlighted with a blue border and contains the text "MM/DD/YYYY". A red arrow points to a calendar icon located to the right of the "DOB" field. A calendar pop-up is displayed, showing the month of May 2020. The calendar has a header with navigation arrows, the month "May", and the year "2020". The days of the week are listed as "Su", "Mo", "Tu", "We", "Th", "Fr", and "Sa". The dates are arranged in a grid, with the 13th of May highlighted in blue. A "Check For" button is visible on the right side of the calendar pop-up.

- ***To add the Client's date of birth, click in the 'DOB' field. You can type in the date of birth using the mm/dd/YYYY format. You can also add the date of birth by clicking the calendar icon on the left side of the field. This will pop open a calendar where you can select a date.***
- ***Age is a calculated field based on date of birth. You cannot manually type in a Client's age.***

Identifying Information Information about the identity of the client

Last Name ★

DOB ★

Gender ★

Gender options:

- Nothing--
- Male
- Female
- Trans Female (MTF or Male to Female)
- Trans Male (FTM or Female to Male)
- Gender Non-Conforming (i.e. not exclusively male or female)

Race ★

- **To add a Client's gender identification, click the 'Gender' drop-down list. Select the option that best fits your client. Options include 'Client Doesn't Know' and 'Client Refused'.**

First Name ★

Age

Primary Language ★

Primary Language options:

- English
- Nothing--
- Chinese
- Spanish
- English
- Bilingual - English/Spanish
- Russian
- Arabic

Ethnicity ★

- **To add a Client's primary language, click the 'Primary Language' drop-down list. Primary language options include 'Other' and 'Unknown'. The primary language default is 'English'.**

Identifying Information

Last Name ★

DOB ★

Gender ★

Race ★

Choose Options...

☒ American Indian or Alaska Native
☒ Asian
☒ Black or African American
☒ Native Hawaiian or Other Pacific Islander
☒ White

Add Selected Cancel

- **To identify a Client's Race, click the 'Chose Options' drop-down list next to 'Race'. Select all applicable race identifications and click 'Add Selected' at the bottom of the menu. Race options include 'Client Doesn't Know', 'Client Refused', 'Other', and 'Data Not Collected'.**

First Name ★

Age

Primary Language ★

English

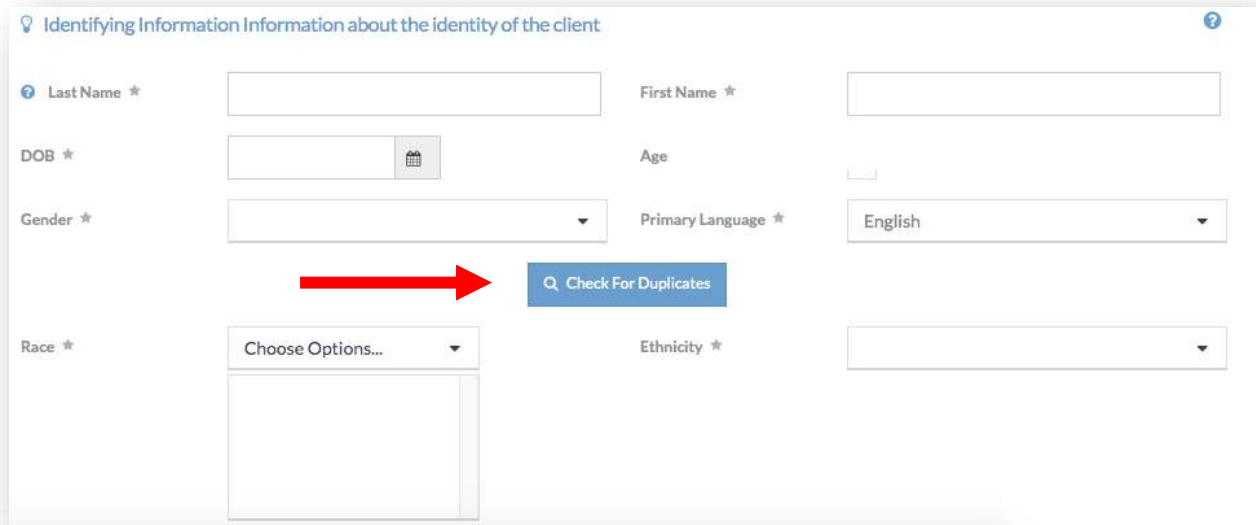
Duplicates

Ethnicity ★

--Nothing--
 Non-Hispanic or Latino
 Hispanic or Latino
 Client Doesn't Know
 Client Refused
 Data Not Collected

- **To identify a Client's Ethnicity, select the 'Ethnicity' drop-down list. Select the option most appropriate for your client. Options include 'Client Doesn't Know', 'Client Refused', and 'Data Not Collected'.**

Check for Duplicates



The screenshot shows a form titled "Identifying Information Information about the identity of the client". It contains several input fields for client data: Last Name, First Name, DOB (with a calendar icon), Age, Gender, Primary Language (set to English), Race (with a "Choose Options..." dropdown), and Ethnicity. A blue button labeled "Q Check For Duplicates" is positioned in the center of the form. A red arrow points from the left towards this button, highlighting it as the next step in the process.

- ***In the center of the Demographics section of the new client form, there is a button labelled 'Check for Duplicates'. Checking for duplicates is a required process that helps reduce the number of duplicate client profiles created.***
- ***To check for duplicates, first complete the first and last name fields in the demographics data. You may complete other fields to further filter the results. Select the 'Check for Duplicates' button.***

Name	SSN	Birth Date	Alias	PreName	FamilyName	FamilyID	ClientID
Test, Candace	000-00-0000	04/05/1932			Test,Candace-4/5/1932	14647	25220
Test, Candace		08/19/1991			Test,Candace-1991-08-19	14279	24844
Test, Cecelia	000-00-0000	04/01/1990			Test,Cecelia-4/1/1990	14708	25281
Test, Jane	000-00-0000	01/01/2000			Test,Jane-1/1/2000	14742	25315
Test, Test	000-00-0000	04/17/2020			Test,Test-4/17/2020	14707	25280
Tester, Kelly	000-00-0000	07/28/1987			Tester,Kelly-7/28/1987	17037	27610


[This is a new client](#)
[Cancel](#)

- ***A new screen will appear with a list of potential duplicate clients based on the demographic information provided. If no list appears, no previously created clients matched that criteria.***

Name	SSN	Birth Date	Alias	PreName	FamilyName	FamilyID	ClientID
Test, Candace	000-00-0000	04/05/1932			Test,Candace-4/5/1932	14647	25220


- ***If a profile matching your client appears, select the row containing your client. The window will close and the client's information will be auto populated into the remaining fields. The 'Check for Duplicates' button will no longer appear.***

Tester, Kelly	000-00-0000	07/28/1987	Tester, Kelly-7/28/1987	17037	27610
---------------	-------------	------------	-------------------------	-------	-------


This is a new client
Cancel

- ***If a profile matching your client does not appear, select ‘This is a new client’ at the bottom left-hand corner of the window. The window will close and you will need to complete the remaining fields on this form. The ‘Check for Duplicates’ button will no longer appear.***

Address Lookup

 Address Information

Google Address Lookup Enter a location

Address *

Zip Code *

City

Latitude

Country * United States of America

Update All Family Members ☐

Apartment Number

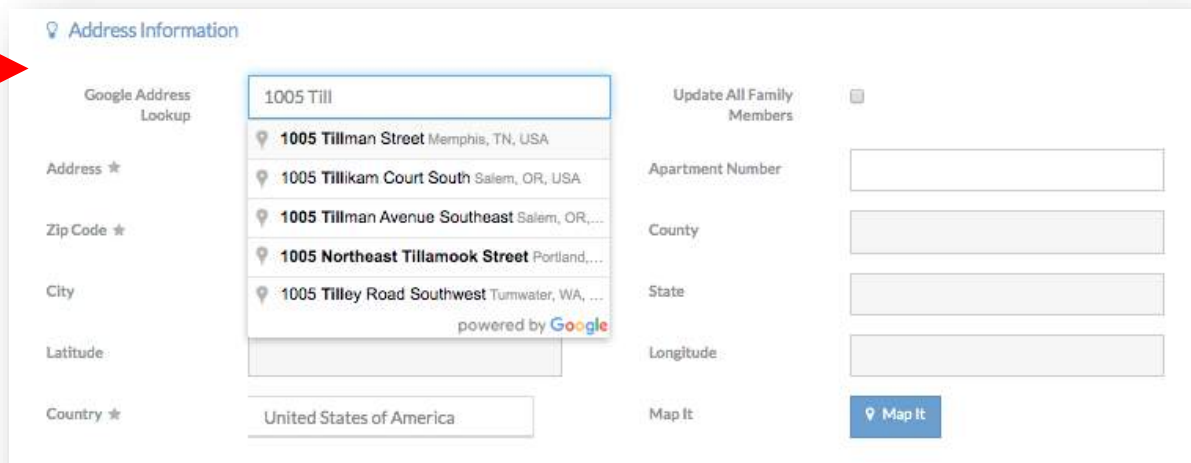
County

State

Longitude

Map It 📍 Map It

- ***To complete the address information for a client, you are required to use the ‘Google Address Lookup’ field. This ensures that an address is real and eliminates data entry errors.***



Address Information

Google Address Lookup: 1005 Till

Address ★: 1005 Tillman Street Memphis, TN, USA

Zip Code ★: 1005 Tillkam Court South Salem, OR, USA

City: 1005 Tillman Avenue Southeast Salem, OR, ...

Latitude: 1005 Northeast Tillamook Street Portland, ...

Country ★: 1005 Tilley Road Southwest Tumwater, WA, ...

United States of America

Update All Family Members ☐

Apartment Number

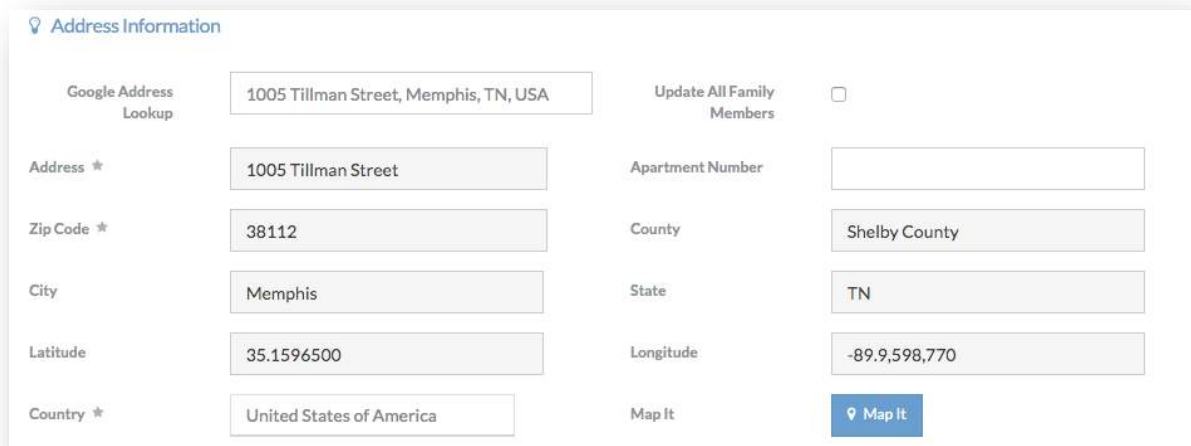
County

State

Longitude

Map It [Map It](#)

- **To add a Client Address, begin typing the address in the 'Google Address Lookup' text box. As you type, potential addresses will appear as a list below the text box. Once the correct address appears, select that address.**



Address Information

Google Address Lookup: 1005 Tillman Street, Memphis, TN, USA

Update All Family Members ☐

Address ★: 1005 Tillman Street

Zip Code ★: 38112

City: Memphis

Latitude: 35.1596500

Country ★: United States of America

Apartment Number

County: Shelby County


State: TN

Longitude: -89.9,598,770

Map It [Map It](#)

- **After selecting the correct address, all other address fields will be auto populated in the address information section.**

Address Information

Google Address Lookup	<input type="text" value="1005 Tillman Street, Memphis, TN, USA"/>	Update All Family Members	<input type="checkbox"/>
Address *	<input type="text" value="1005 Tillman Street"/>	Apartment Number	<input type="text"/>
Zip Code *	<input type="text" value="38112"/>	County	<input type="text" value="Shelby County"/>
City	<input type="text" value="Memphis"/>	State	<input type="text" value="TN"/>
Latitude	<input type="text" value="35.1596500"/>	Longitude	<input type="text" value="-89.9,598,770"/>
Country *	<input type="text" value="United States of America"/>	Map It	<input type="button" value="Map It"/> 

- ***If you click the 'Map It' button, a Bing map window will appear with a map of the address selected.***

Contact Information

Contact Information

Ok to contact by * phone	<input type="text"/>	Ok to contact by * email	<input type="text"/>
Ok to contact by text *	<input type="text"/>	Email Address	<input type="text"/>
		Confirm Email Address	<input type="text"/>
Cell Phone	<input type="text"/>	Primary	<input type="button" value="Primary"/>
Home Phone	<input type="text"/>	Secondary	<input type="button" value="Secondary"/>
Work Phone	<input type="text"/>	Tertiary	<input type="button" value="Tertiary"/>

- ***The Client contact information indicates the preferred method Agencies will contact this Client. You must include at least one method of contact for a Client.***

Contact Information

Ok to contact by ★
phone

Ok to contact by text ★

--Nothing--
Yes
No

- ***To indicate whether a client has agreed to a method of contact, select the ‘OK to contact by ...’ drop-down menu. Select ‘Yes’ to indicate the contact method is okay or ‘No’ to indicate it is not okay.***

Contact Information

Ok to contact by ★
phone Yes

Ok to contact by text ★
Yes

Cell Phone Primary

Home Phone Secondary


Work Phone Tertiary

Ok to contact by ★
email No

Email Address

Confirm Email Address

- ***If you select ‘Yes’ to any of the ‘Ok to contact by ...’ questions, the text will appear red. The red indicates that you must provide that contact information for the client.***

 Contact Information

Ok to contact by <small>★</small> phone	<input type="text" value="Yes"/>	Ok to contact by <small>★</small> email	<input type="text" value="No"/>
Ok to contact by text <small>★</small>	<input type="text" value="Yes"/>	Email Address	<input type="text"/>
		Confirm Email Address	<input type="text"/>
Cell Phone	<input type="text"/>	<input type="text" value="Primary"/>	
Home Phone	<input type="text"/>	<input type="text" value="Secondary"/>	
Work Phone	<input type="text"/>	<input type="text" value="Tertiary"/>	

- ***If you select 'No' to any of the 'Ok to contact' questions, the text will remain black and you will not be required to provide that contact information.***

Cell Phone	<input type="text"/>	<input type="text" value="Primary"/>
Home Phone	<input type="text"/>	<input type="text" value="Secondary"/>
Work Phone	<input type="text"/>	<input type="text" value="Tertiary"/>

- ***If multiple contact phone numbers are provided for a client, they can be ranked in preference from 'Primary' (first), 'Secondary' (second), to 'Tertiary' (third).***

Email Address

Confirm Email Address

- ***If a client provides an email address, that email address must be completed in both the email address text box and the confirm email address text box.***
- ***After completing all required information on this form, click 'Next' in the lower right hand corner of the screen.***

Adding Family Members

+ Add Family Member

	Last Name *	First Name *	ⓈCheck for Duplicates *	Birth Date *	Gender *	Age
<input checked="" type="checkbox"/>	Test2	Candace		8/19/1991	Female	28

1

- ***On the next page of the Add Client workflow, you will see a table with the Client you are currently creating. This Client is considered the 'Head of Household' or HOH in CaseWorthy. This form allows you to optionally add 'Family Members' to a client's profile.***

	Last Name *	First Name *	@Check for Duplicates *	Birth Date *	Gender *	Age
<input checked="" type="checkbox"/>	Test2	Candace		8/19/1991	Female	28

1

[+ Add Family Member](#)

- To add additional family members to the client's family, click the 'Add Family Member' button in the upper left-hand corner of the screen. You can add several family members at once. Note that a 'Family' in CaseWorthy groups entities by specifying relationships. You may add individuals to a client's family in the way that makes the most sense for the client and your program's services.

	Last Name *	First Name *	@Check for Duplicates *	Birth Date *	Gender *	Age
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	Check For Duplicates	<input type="text"/>	<input type="text"/>	

Specify Relationship ★

Ethnicity ★

Family Status ★

Home Phone

Work Phone

First Language ★

Race ★

Is Dependent ☐

Cell Phone

Email

Confirm Email

[Address](#)

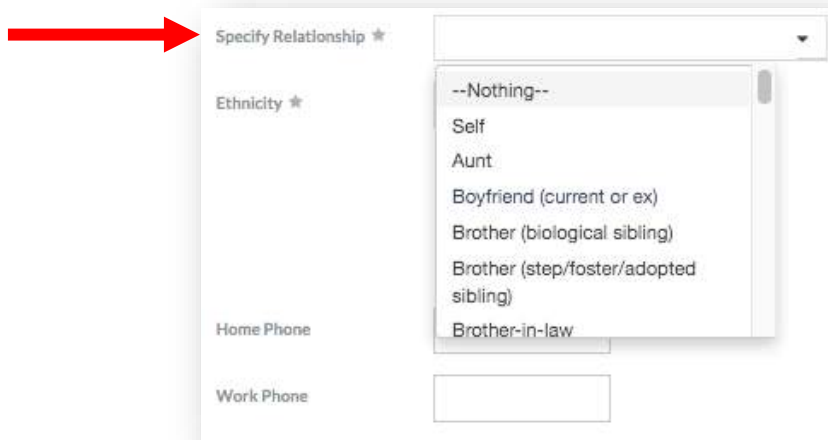
- A new row will appear in the table as well as blank fields to be completed for the new family member.

	Last Name *	First Name *	@Check for Duplicates *	Birth Date *	Gender *	Age
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Q Check For Duplicates"/>	<input type="text"/>	<input type="text"/>	

- ***In the table row, you must complete the Last Name, First Name, Birth Date, and Gender for the new family member.***

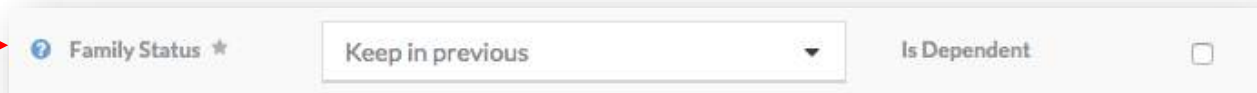
	Last Name *	First Name *	@Check for Duplicates *	Birth Date *	Gender *	Age
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Q Check For Duplicates"/>	<input type="text"/>	<input type="text"/>	

- ***When adding family members, you must also check for duplicates. Checking for duplicates for a family member is the same process as checking for duplicates for the original Client. Family members can be new clients or you can select previously created clients. After completing the check for duplicates process, the 'Check For Duplicates' button will disappear.***



A screenshot of a form with several fields. A red arrow points to the 'Specify Relationship' dropdown menu, which is open and showing a list of relationship options. The options are: --Nothing--, Self, Aunt, Boyfriend (current or ex), Brother (biological sibling), Brother (step/foster/adopted sibling), and Brother-in-law. Other fields visible include Ethnicity, Home Phone, and Work Phone.

- ***‘Specify Relationship’ is a field unique to family members. This field indicates how this individual is related to the HOH. To indicate the relationship, click the ‘Specify Relationship’ drop-down list. Select the option that best describes the Client and Family member’s relationship. Options include ‘Other’ and ‘Unknown’.***



A screenshot of a form with a red arrow pointing to the 'Family Status' dropdown menu. The dropdown is open and shows the option 'Keep in previous'. To the right of the dropdown is a checkbox labeled 'Is Dependent'.

- ***‘Family Status’ indicates whether the family member should be remain or be removed from a previous family (if applicable). ‘Remove from previous’ is only an option if the family member is a duplicate client. This will remove the family member from the previous Family ID and add them to the current HoH’s Family ID.***
- ***The ‘Is Dependent’ check box indicates if this family member is a dependent of the HOH.***

Home Phone	<input type="text"/>	Cell Phone	<input type="text"/>
Work Phone	<input type="text"/>	Email	<input type="text"/>
		Confirm Email	<input type="text"/>

- ***The contact information fields allow you the option of indicating contact information specific to the family member.***

<input checked="" type="checkbox"/>	Test	Benjamin		8/31/1990	Male	29
-------------------------------------	------	----------	--	-----------	------	----

1



- ***Once all the family members have been created, click save in the lower right hand corner of the screen.***

Client Web Portal

To enable this client to access the Client Web Portal, please enter an email address below. Email address cannot be already in use. An email will be sent to the client with instructions on how to register. If you do not wish to set up access for this client, simply click 'Cancel' below.

Client Email Address *

- ***The final form in the Add New Client workflow allows you to set up the Client's access to the Client Web Portal. The Client Web Portal allows Clients to directly access their information in CaseWorthy, such as contact information and referrals.***

- ***To set up Client access, type in the Client's email address into the text box. The email address must be unique and not used for any other Client in CaseWorthy. Click 'Save' in the lower right hand corner to complete the workflow. If a Client opts out of accessing the portal, click the 'Cancel' button in the lower right hand corner to complete the workflow.***

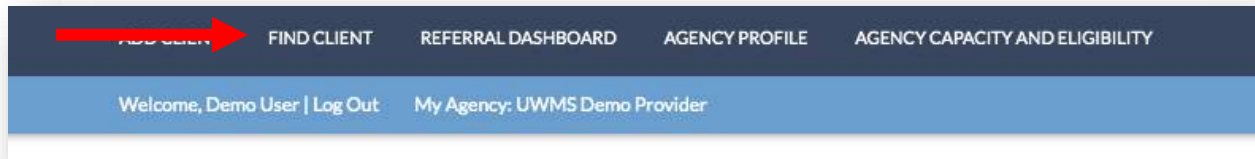
Workflow is now complete.

- ✓ Fri, May 8, 2020 At 02:25 PM User, Demo DTD Add New Client
- ✓ Fri, May 8, 2020 At 02:32 PM User, Demo UWMS Quick Add Family Member
- ✓ Fri, May 8, 2020 At 02:40 PM User, Demo Setup Portal Clients Access (Individual)

- ***On the next screen, you will see the text 'Workflow is now complete'. You have now completed the Add New Client workflow. Click 'Done' in the lower right hand corner of the screen.***

Client Dashboard

Finding Existing Clients



- **To find an existing client, click the ‘Find Client’ button located on the top navigational bar.**

The screenshot shows a consent section with a light blue background. It contains a light blue icon and the text: 'By checking the box below, I certify that the client has consented to have their record searched, identified, and accessed. I understand that my access patterns are recorded.' Below this is a label 'Client Has Given * Consent' followed by an unchecked checkbox.

- **Clients must consent to have their record searched. Verbal consent can be indicated by clicking the checkbox ‘Client Has Given Consent’. Note that Driving the Dream administrators can track Client search history by users.**

The screenshot shows a search form with a light blue background. It contains a light blue icon and the text: 'Please search using the terms below. You must enter at least the first letter of the client's first and last names.' Below this are four input fields: 'Last Name *', 'First Name/Alias *', 'Date of Birth' (with a calendar icon), and 'Client ID'. At the bottom right is a dark blue 'Search' button with a magnifying glass icon. A red arrow points to the 'Search' button.

- **To search for a Client, you must include at least the first letter of the Client's first and last name. You may also include the Client's DOB or ID. After completing the required fields, click the ‘Search’ button in the lower right-hand corner of the screen.**





Total Rows: 4							Q Search
LAST NAME	FIRST NAME/ALIAS	FAMILY NAME	FAMILYID	DATE OF BIRTH	SELECT CLIENT	CLIENT ID	
Test	Candace	Test,Candace-4/5/1932	14647	4/5/1932	Select Client	25220	
Test	Candace	Test,Candace-1991-08-19	14279	8/19/1991	Select Client	24844	
Test	Cecelia	Test,Cecelia-4/1/1990	14708	4/1/1990	Select Client	25281	
Test2	Candace	Test2,Candace-1991-08-19	17202	8/19/1991	Select Client	27775	





1 Results Per Page: 50

- ***A table will appear with Clients that meet your search criteria. After identifying the correct client, click the 'Select Client' button.***

Navigating the Client Dashboard

Client					
FirstName	LastName	BirthDate	CellPhone	HomePhone	WorkPhone
Candace	Test	04/05/1932			

Menu			
 Client Demographics	 Family Members	 Client Referrals	 Client Documents

Assess Client	View Assessments		
 Assess	 ASSM	 Resilience Assessment	 View Service Area Scores

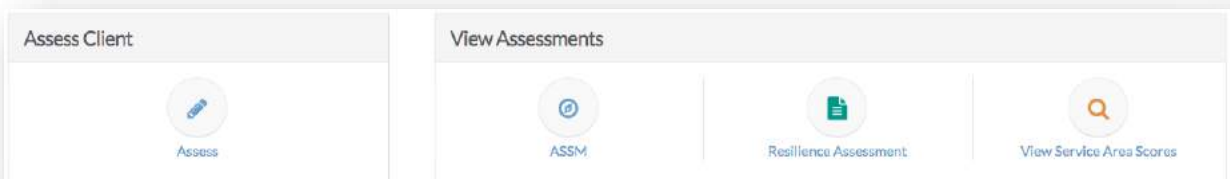
- ***The Client Dashboard allows you to interact with all demographic information regarding a Client as well as their referral and assessment history. You must navigate to the Client Dashboard to make a new referral for a Client.***

Client					
FirstName	LastName	BirthDate	CellPhone	HomePhone	WorkPhone
Candace	Test	04/05/1932			

- ***At the top of the Client Dashboard is a table containing the Client's first name, last name, birth date, and phone numbers (if supplied).***

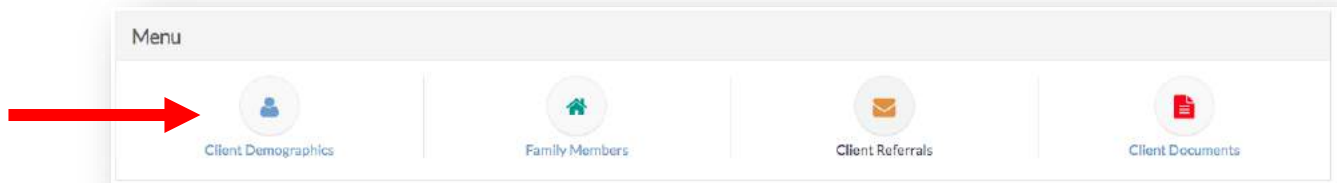


- ***At the center of the Client Dashboard is a menu section. The menu section has links to Client Demographics, Family Members, Client Referrals, and Client Documents.***



- ***At the bottom of the Client Dashboard is the assessment section. The assessment section has links to complete an optional assessment for a Client or view previously completed Client assessments.***

Client Dashboard - Menu Selections



- ***To view Client Demographics, select the 'Client Demographics' button in the menu section of the Client Dashboard. This will take you to the Client Demographic form (see 'Adding a New Client'). Any updates to a Client's information, such as address or contact information, can be made here.***



- ***To view and/or add additional family members, select the 'Family Members' button in the menu section of the Client Dashboard. This will take you to the Family Member table where you can view any existing family members. To add additional family members, click the 'Add Family Member' button in the upper right hand corner. See 'Adding Family Members' for more information.***



- **To view and/or add documents to a Client's profile, select the 'Client Documents' button in the menu section of the Client Dashboard.**

The screenshot shows a table with the following structure:

Total Rows: 1					Q Search
	CREATED DATE	DOCUMENT TYPE	DESCRIPTION	VIEW FILE	CASE NOTE
⚙	5/11/2020	Completed Forms	Example Document	View File	

At the bottom right, it says 'Results Per Page: 50' with a dropdown arrow. A blue box with the number '1' is centered below the table.

- **A table will appear that lists any documents that have been uploaded to a Client's profile.**

The screenshot shows the same table as before, but with a context menu open over the gear icon in the left-hand column. The menu has two options: 'Edit' (with a pencil icon) and 'Delete' (with a trash can icon). A red arrow points from the left towards the gear icon.

Total Rows: 1					Q Search
	CREATED DATE	DOCUMENT TYPE	DESCRIPTION	VIEW FILE	CASE NOTE
⚙	5/11/2020	Completed Forms	Example Document	View File	


At the bottom right, it says 'Results Per Page: 50' with a dropdown arrow. A blue box with the number '1' is centered below the table.

- **To edit or delete an existing document, click the gear on the left-hand column of the table. Select the appropriate option for the document.**


Total Rows: 1					Q Search
	CREATED DATE	DOCUMENT TYPE	DESCRIPTION	VIEW FILE	CASE NOTE
	5/11/2020	Completed Forms	Example Document	 View File	

1 Results Per Page: 50

- ***To view the document, select the 'View File' button in the table. Depending on the type of document, either a new window will appear or the document will be downloaded.***

Total Rows: 1					Q Search
	CREATED DATE	DOCUMENT TYPE	DESCRIPTION	VIEW FILE	CASE NOTE
	5/11/2020	Completed Forms	Example Document	 View File	

1 Results Per Page: 50

 Upload Document

- ***To upload a new document to a Client's profile, select the 'Upload Document' button the upper right hand corner of the screen.***

Document Type *	Upload File *	Created Date	Expiration Date
<input checked="" type="checkbox"/> Eligibility Information			
<input checked="" type="checkbox"/> Personal Documents			
<input checked="" type="checkbox"/> Completed Forms			
<input checked="" type="checkbox"/> Patient Authorization			
<input checked="" type="checkbox"/> Client Consent			

- ***A new window will appear with a table containing several different document type options. Select the checkbox in the left-hand column of the option that most appropriately describes the document.***

Document Type *	Upload File *	Created Date	Expiration Date
<input checked="" type="checkbox"/> Eligibility Information	<input type="text"/> <input type="button" value="Browse"/> <input type="button" value="Attach Scanned Document"/>	<input type="text" value="05/10/2020"/>	<input type="text"/>

Description:

Case Note:

- ***New fields will appear that will allow you to browse and upload a document from your computer, add a description, include a case note, and indicate an optional expiration date.***

This screenshot shows the top section of the 'Client Referrals' page. At the top right, there are two orange buttons: 'View Service Area Scores' and 'New Referral'. Below these is a blue button with a plus icon. A 'Filters' link is also visible. A search bar contains the text 'For Client 'DressforSuccessM, TESTDEMO''. Below the search bar, there are two lines of instructional text: 'Click on the Referral Date to edit the referral.' and 'Click the Service Area Scores button to update the client's service area scores.' The filter section includes a 'Service Area' dropdown, a 'Referral Date' range selector with 'through' text and calendar icons, and a 'Referral Status' dropdown. A 'Finalized' checkbox is also present.


- ***On the Client Referrals page, you can search for past client referrals, view past service area scores, or add a new referral.***

This screenshot shows the filter fields on the 'Client Referrals' page. It includes the same instructional text as the previous screenshot: 'Click on the Referral Date to edit the referral.' and 'Click the Service Area Scores button to update the client's service area scores.' The filter section consists of a 'Service Area' dropdown, a 'Referral Date' range selector with 'through' text and calendar icons, and a 'Referral Status' dropdown. A 'Finalized' checkbox is also present.

- ***To search for past Client referrals, use the filter fields located above the 'Search' button. You can filter referrals by service area, a referral date range, referral status, and/or whether the referral is at a finalized status. After including as many filter parameters as desired, select 'Search'.***

Total Rows: 1

Q Search

	REFERRAL DATE	CLIENT	SERVICE AREA	REFERRAL SCORE	LAST SCORE (ALL SOURCES)	LAST SCORE DATE	REFERRED FROM AGENCY	REFERRED TO AGENCY	REFERRAL STATUS	FIN
	7/11/2019 12:00:00 AM	DressforSuccessM, TESTDEMO	Community Involvement				Dress for Success Memphis	Dress for Success Memphis	Ineligible	Yes

- Any past referrals will appear in a table below the 'Search' button. To view the referral form and make any changes to the referral status, click the entry in the referral date column.

Select Client

Service

Care Coordination Referral

Referred From

United Way of the Mid-South

Referral Status

Sent

Referral Date

05/11/2020

Refer To UserID

--Nothing--

Referral ID

11046

Provider Information

Provider

Coor

Address

785 Jackson Avenue

City

State

TN

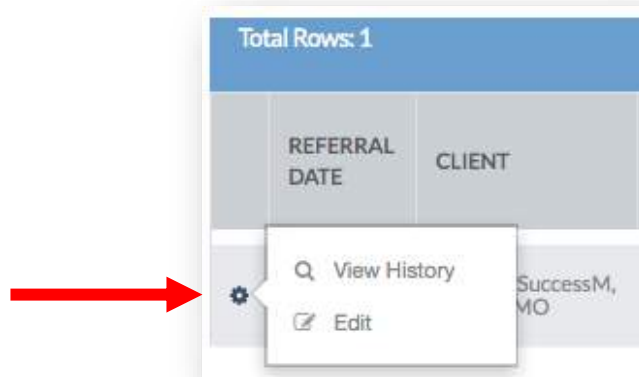
Phone

901-881-6031

Email

akosua@ncclife.org

- To make an status update to a referral, click the 'Referral Status' drop-down list on the referral form. A list will appear containing several referral status options. Select the most appropriate option and click 'Save' at the bottom of the screen. For more information about the referral form, see 'Add a New Client Referral'.



- ***To view the history of a referral, click the gear on the left hand side of the table. Select 'View History'.***

Client	DressforSuccessM, TESTDEMO	Referral Date	07/11/2019
To Provider	Dress for Success Memphis	ProviderReferralID	8389
Program			

Total Rows: 1							
DATE	BY USER	FOR PROVIDER	REFERRAL STATUS	SERVICE AREA	SCORE	SCORE DATE	REFER TO USER
5/11/2020 10:37 AM	Sanders, Candace	United Way of the Mid-South	Ineligible	Community Involvement			

1

Results Per Page: 50

- ***The referral history page generates a table of all referral updates for a client, including the date of the update and the user who made the change.***

View Client Service Area Scores

Referrals

For Client 'DressforSuccessM, TESTDEMO'

Click on the Referral Date to edit the referral.
Click the Service Area Scores button to update the client's service area scores.

Service Area

Referral Date

Referral Status

View Service Area Scores

New Referral

Filters

- **To view past service area scores for a Client, select the 'View Service Area Scores' in the upper right hand corner of the screen.**

View Service Area Scores

Filters

The client's latest score for each Service Area is listed below. To add a new score, click on the Service Area name and answer the questions on the linked form.

Total Rows: 20

SERVICE AREA	SCORE	DESCRIPTION	DATE ENTERED
01. Income			
02. Employment			
03. Financial Management (Credit)			
04. Financial Management (Debt)			

- **A new window will appear with a table containing each service area and any available score for that service area. Service areas correspond with the 20 domains of the Arizona Self-Sufficiency Matrix (ASSM).**

Total Rows: 20				Q Search
SERVICE AREA	SCORE	DESCRIPTION	DATE ENTERED	
01. Income				
02. Employment				
03. Financial Management (Credit)				
04. Financial Management (Debt)				

- **To view past completed service area questions, select the appropriate service area. A new window will appear where you can view the questions and previous answers. You cannot make changes to past service area scores. For more information about Service Area Scores, see ‘Add a New Client Referral – Existing DTD Agencies’ and ‘Assess Client’.**

Add a New Client Referral – Existing DTD Agencies

View Service Area Scores
+ New Referral

Filters

Referrals
For Client 'DressforSuccessM, TESTDEMO'


Click on the Referral Date to edit the referral.
Click the Service Area Scores button to update the client's service area scores.

Service Area
Referral Date
Referral Status

- **To add a new Client referral to an existing DTD Agency, select the ‘New Referral’ button in the upper right hand corner of the screen. You will now begin the Add New Client Referral workflow.**

You have now begun the new referral workflow.

Please review and update the Client's demographic and contact information before continuing to the referral form.



- ***When you begin the Add New Client Referral workflow, you will see a screen similar to the one above. Select 'Next' to continue to the Client Demographic form for review.***

Identifying Information Information about the identity of the client

Last Name ★ First Name ★

DOB ★ Age

Gender ★ Primary Language ★


Race ★


Ethnicity ★

Address Information



Google Address Lookup Update All Family Members ☐


- ***The first step of the Add New Client Referral workflow is to review Client demographic information and contact information. Make any necessary edits and select 'Next' to continue to the referral form. See 'Add Client' for more information on the Client Demographic form.***


 I am consenting to allow agencies that are part of the DTD Network to share select pieces of information about me in order to provide high quality timely services. This information includes: 1) My contact information, 2) Information I provided on the Driving The Dream referral form and/or intake form, 3) Assessments that would be helpful to other service providers so that I do not need to share the same information again, 4) DTD-related consent forms, 5) Results of referrals to service providers or meetings with my Care Coordinator.

Client Consent  Client Name

Click on the lookup to select the referral agency, program, and service. Then select the user being referred to, if applicable.

Referral Date  

Refer To 

 Case Note and Restriction Information

Case Note

- ***The referral form contains the Client consent text, the referral to selection, and an optional case note. Note that the Client's name is auto populated. The referral date is defaulted to today's date and time, but can be edited.***

 I am consenting to allow agencies that are part of the DTD Network to share select pieces of information about me in order to provide high quality timely services. This information includes: 1) My contact information, 2) Information I provided on the Driving The Dream referral form and/or intake form, 3) Assessments that would be helpful to other service providers so that I do not need to share the same information again, 4) DTD-related consent forms, 5) Results of referrals to service providers or meetings with my Care Coordinator.

Client Consent  Client Name

- ***The Client consent text provides an explicit explanation of what a Client is consenting to when a referral is created. It is imperative a Client understands and agrees to the Client consent. To indicate consent, check the 'Client Consent' checkbox below the Client consent text.***

Click on the lookup to select the referral agency, program, and service. Then select the user being referred to, if applicable.

Referral Date ★ 05/11/2020 12 : 21 PM

Refer To ★

💡 Case Note and Restriction Information

Case Note

- **To identify a provider to refer a client to, select the 'Refer To' search lookup.**

Filters

Service Area

Provider Name

Distance In Miles

Total Rows: 208

SERVICE AREA	PROVIDER	PROGRAM	SERVICE	ELIGIBILITY	CAPACITY	EMAIL	DISTANCE	USAGE THIS MONTH	PHONE	ENTITYID
Employment	City of Memphis Workforce Development, 125 North Main Street, Memphis	COM - Workforce Development	Employment Referral		9999			0		24792
Childrens Education	New Ballet Ensemble, 2157 York Avenue, Memphis	New Ballet - New Ballet Ensemble	Children's Education Referral	Ages 3-18.	9999			0	901-735-9225	24458
Employment	Economic Opportunities, 2163 Airways Boulevard, Memphis	Economic Opportunities	Employment Referral	Re-entry workforce development service. Drug screening required.	9999			0	901-529-7294	24878

- **A new window will appear with a table of all available referral providers.**

Filters

Service Area:

Provider Name:

Distance In Miles:

Map

- ***The table of providers can be filtered by using the fields above the ‘Search’ button. The table of providers can be searched by service area, name, or distance from the Client’s address.***

Filters

Service Area:

Provider Name:

Distance In Miles:

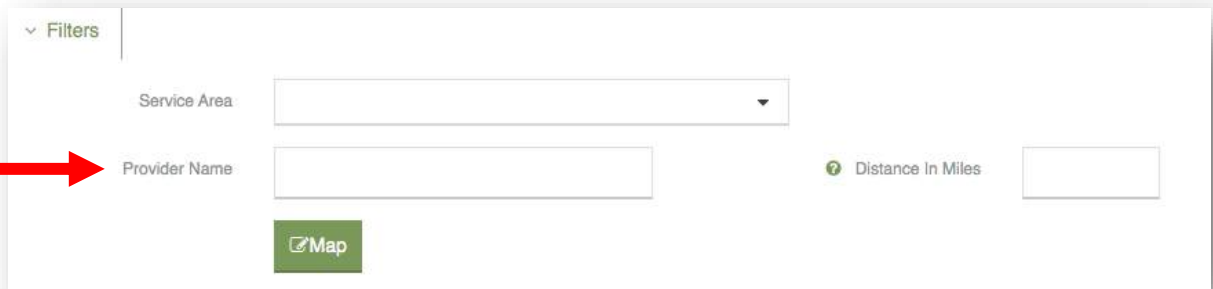
--Nothing--

*Care Coordination

Adult Education

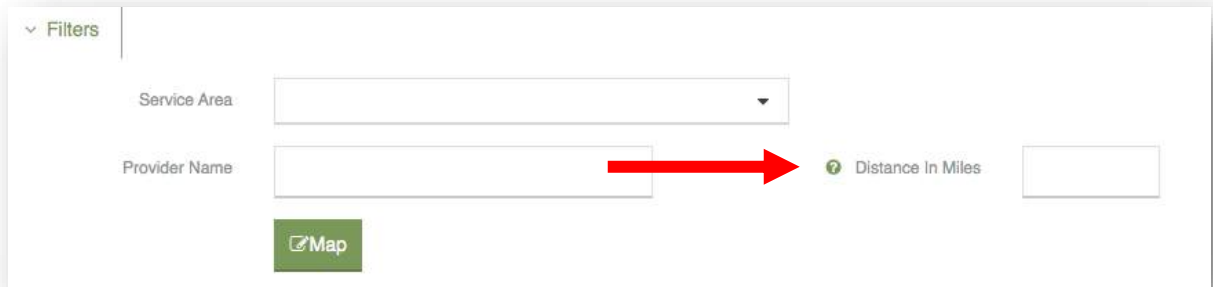
Childcare

- ***To search by service area, select the ‘Service Area’ drop down list. Service area options include the 20 domains of the Arizona Self Sufficiency Matrix as well as Care Coordination.***



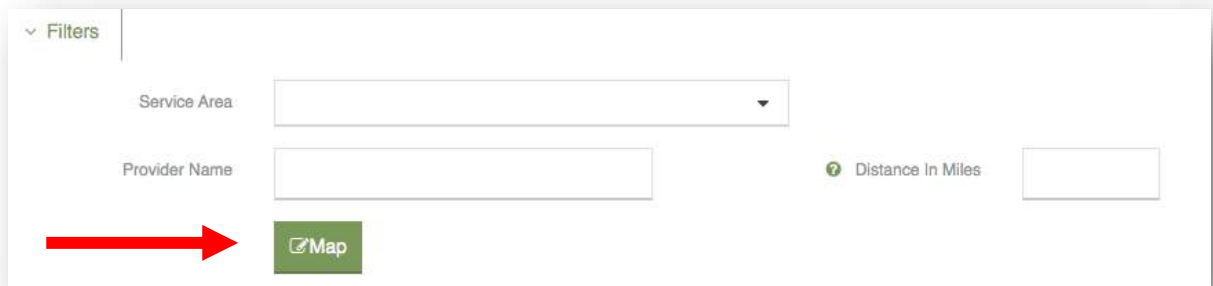
The screenshot shows a 'Filters' section with three input fields: 'Service Area' (a dropdown menu), 'Provider Name' (a text box), and 'Distance In Miles' (a text box with a help icon). A red arrow points to the 'Provider Name' text box. Below the text boxes is a green button labeled 'Map' with a location pin icon.

- ***To search by provider name, type the name into the ‘Provider Name’ text box.***



The screenshot shows the same 'Filters' section. A red arrow points to the 'Distance In Miles' text box.

- ***To search by distance from the Client’s address, type a number in the ‘Distance in Miles’ text box.***



The screenshot shows the same 'Filters' section. A red arrow points to the green 'Map' button.

- ***To view a map of all Providers, select the ‘Map’ button. A new window will appear with a map of all Provider locations.***

SERVICE AREA	PROVIDER	PROGRAM	SERVICE	ELIGIBILITY	CAPACITY	EMAIL	DISTANCE	USAGE THIS MONTH	PHONE	ENTITYID
Employment	City of Memphis Workforce Development, 125 North Main Street, Memphis	COM - Workforce Development	Employment Referral		9999			0		24792
Childrens Education	New Ballet Ensemble, 2157 York Avenue, Memphis	New Ballet - New Ballet Ensemble	Children's Education Referral	Ages 3-18.	9999			0	901-725-9225	24458
Employment	Economic Opportunities, 2163 Airways Boulevard, Memphis	Economic Opportunities	Employment Referral	Re-entry workforce development service. Drug screening required.	9999			0	901-529-7294	24878

- **The Provider table contains the Provider's service area, name, program, any eligibility information, capacity, distance from the Client, usage this month, phone number, and entity ID. To select a provider, click anywhere in the row that contains the provider's information.**

Referral Date *

05/11/2020

12:21 PM

Refer To *

Catholic Charities of West TN

Refer to Person

Specific Referral Reason

Program

CCWTN - Immigration Serv. - Naturalization

Email

Service

Adult Education Referral

Phone Number

Provider Address

1325 Jefferson Avenue, Memphis, TN 3810

View/Upload Documents


Case Note and Restriction Information

Case Note

Case Note

- **After selecting a Provider, the window will close. On the referral form, several populated fields will appear with information about the Provider and Program.**

Referral Date ★ 05/11/2020 12:21 PM

Refer To ★ Catholic Charities of West TN  Refer to Person

Specific Referral Reason

Program CCWTN - Immigration Serv. - Naturalization Email

Service Adult Education Referral Phone Number

Provider Address 1325 Jefferson Avenue, Memphis, TN 3810 [View/Upload Documents](#)

[Case Note and Restriction Information](#)

Case Note [Case Note](#)

- ***Optionally, you can indicate a specific person to receive a referral. All users from a Provider will have access to any referrals sent to that Provider. By indicating a specific person, you can direct that referral to an individual that would best serve that particular Client. To select a specific person at that Provider, click the 'Refer to Person' lookup.***

Provider User Lookup

NAME	USERNAME	EMAIL	ENTITYID
Benalay, Zacharia	zbenalay	zbenalay@caseworthy.com	24490
Brooks, Dana	dana.brooks@acc.cdom.org	dana.brooks@acc.cdom.org	24543
Burden, Eric	eric.burden@uwmidsouth.org	eric.burden@uwmidsouth.org	24397
Butson, Chris	chris.butson@acc.cdom.org	chris.butson@acc.cdom.org	24557
Daddabbo, Rachel	rachel.daddabbo@acc.cdom.org	rachel.daddabbo@acc.cdom.org	24842

- ***A new window will appear with a table of Users for the Provider. Select the appropriate User by clicking anywhere on that User's row. The window will close and that User will now appear in the 'Refer to Person' textbox.***

Referral Date ★ 05/11/2020 1:44 PM

Refer To ★ Catholic Charities of West TN

Specific Referral Reason

Program

Service

Provider Address

Case Note and Restriction Information

- **Optionally, you may select a specific reason for the referral. To select a reason, click the 'Specific Referral Reason' drop down list. Several predetermined reasons will appear. Select the most appropriate reason from the list.**

Referral Date ★ 05/11/2020 12:21 PM

Refer To ★ Catholic Charities of West TN

Specific Referral Reason

Program CCWTN - Immigration Serv. - Naturalization

Service Adult Education Referral

Provider Address 1325 Jefferson Avenue, Memphis, TN 3810

Refer to Person

Email


Phone Number

View/Upload Documents


Case Note and Restriction Information

Case Note








- **Optionally, you may attach a Case Note with additional details about the referral. To attach a Case Note, select the 'Case Note' button at the bottom of the form.**

Reference Date ★ 05/11/2020 

Summary ★ Referral

 Voice To Text

Note Description

Paragraph ▼ Paragraph ▼ System Font ▼ 12pt ▼   **B** *I* U      ...



- ***A new window will appear. The reference date will default to today's date the summary will be pre-populated with 'Referral'.***

Reference Date ★ 05/11/2020 

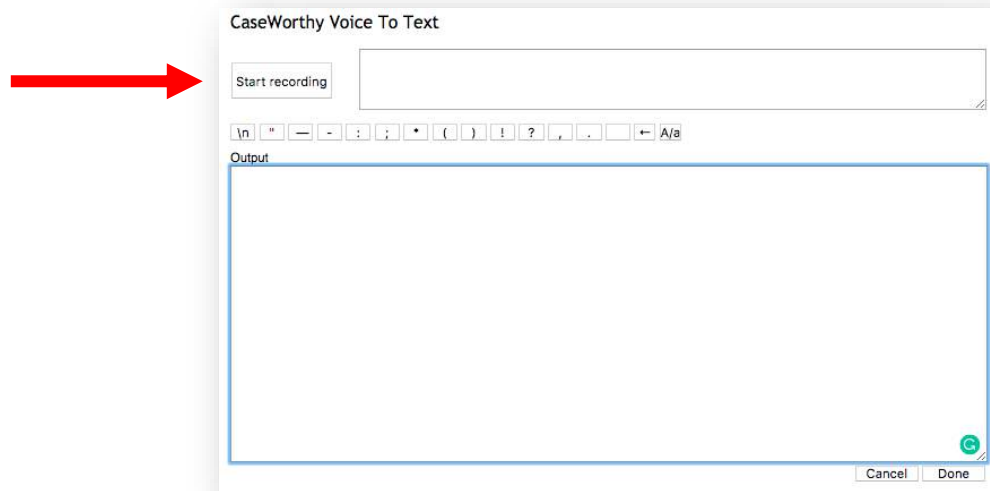
Summary ★ Referral

 Voice To Text

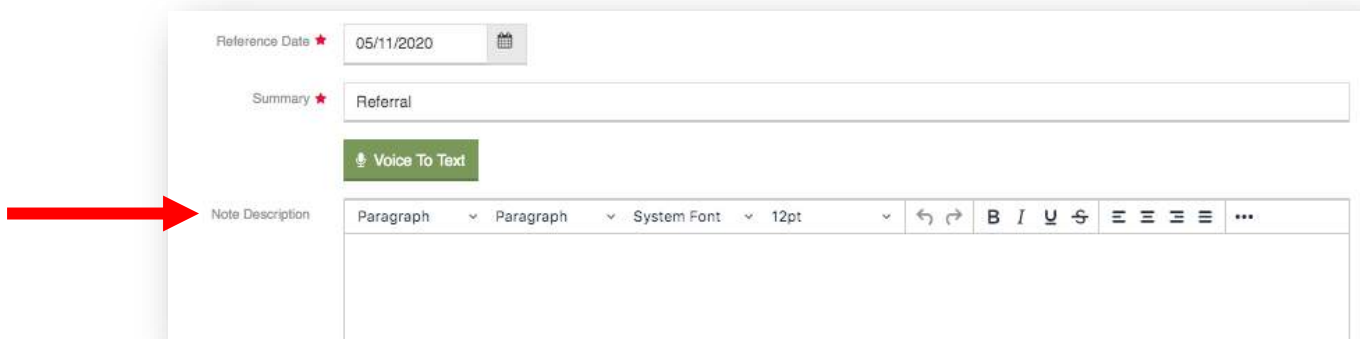
Note Description

Paragraph ▼ Paragraph ▼ System Font ▼ 12pt ▼   **B** *I* U      ...

- ***To transcribe your note by voice to text, select the 'Voice To Text' button. Note that voice to text is only available in the Chrome web browser.***



- ***A new window will appear. To begin transcription, select the ‘Start recording’ button and begin speaking. Your words will be transcribed and appear as text on the screen. Note that you must name punctuation while speaking for it to be transcribed. Once finished, select ‘Done’. The window will close and the text will now appear in the ‘Note Description’ text box.***



- ***To type your case note, use the ‘Note Description’ text box to write the case note. This text box is a rich text editor, allowing you to format the description similar to a word processor.***
- ***Once your case note is complete, click ‘Save’ in the lower right-hand corner. The case note window will close.***

NOTE: There are 2 or more prior referrals for this client. Select 'Yes' below to send an email to a Care Coordinator on this client's behalf.

Refer this client to a ★ Care Coordinator? No

--Nothing--
Yes
No

Save Cancel

- ***If a client has been referred at least twice, you will see a note at the bottom of the form asking if you would like to refer the Client to care coordination. If you select 'Yes', CaseWorthy will generate an email to a Care Coordinator in addition to the referral email. If you select 'No', only the provider receiving the referral will receive an email.***

Case Note and Restriction Information

Case Note Case Note

Save Cancel

- ***Once all information has been completed in the new referral form, click 'Save' in the lower right hand corner of the screen.***

To score the service domain for this referral, please answer the questions below.

Area 20	20. Life Skills	Question	Yes	No
		Does the client need assistance to meet any of their families basic needs of daily living?	<input type="radio"/>	<input type="radio"/>

Score Values:
Total Sum: 0.00

- ***One the second form of the Add New Client Referral workflow, there is a series of assessment questions related to the specific service area for which a client is receiving a referral. Service areas correspond to the 20 domains of the Arizona Self Sufficiency Matrix. Service area assessment questions must be completed for every referral that is created.***
- ***Every question is a 'Yes' or 'No' question. Depending on how a Client answers, more questions may appear. You must complete all questions that appear.***
- ***As questions are answered, the form automatically calculates a 'Score Value'. This value corresponds to the score from that section of the Arizona Self Sufficiency Matrix. The higher the overall score, the higher the Client's self-sufficiency in that particular area. Once all questions are completed, click 'Save' in the lower right hand corner of the form.***
- ***If you are referring the Client to Care Coordination, you will not see any assessment questions. Select 'Save' in the lower right hand corner of the blank form.***

Workflow is now complete.

- ✓ Mon, May 11, 2020 At 04:19 PMSanders, CandaceDTD Add Provider Referral
- ✓ Mon, May 11, 2020 At 04:19 PMSanders, CandaceService Area Questions - Referral

- ***The Add New Client Referral workflow is now complete.***

Add a New Client Referral – Out-of-Network

Filters

Service Area:

Provider Name:

Distance In Miles:

[Map](#)

Total Rows: 208 [Search](#)

SERVICE AREA	PROVIDER	PROGRAM	SERVICE	ELIGIBILITY	CAPACITY	EMAIL	DISTANCE	USAGE THIS MONTH	PHONE	ENTITYID
Employment	City of Memphis Workforce Development, 125 North Main Street, Memphis	COM - Workforce Development	Employment Referral		9999			0		24792
Children's Education	New Ballet Ensemble, 2157 York Avenue, Memphis	New Ballet - New Ballet Ensemble	Children's Education Referral	Ages 3-18.	9999			0	901-726-9225	24458
Employment	Economic Opportunities, 2163 Airways Boulevard, Memphis	Economic Opportunities	Employment Referral	Re-entry workforce development service. Drug screening required.	9999			0	901-829-7294	24878

- To create a referral to an Agency outside of the DTD network, complete the steps for 'Add a New Client Referral – Existing DTD Agencies' up until the point of selecting a referral agency.

Filters

Service Area:

Provider Name:

Distance In Miles:

[Map](#)

- Type 'Out of Network' in the 'Provider Name' text box above the table of referral agencies. Select 'Search'.

SERVICE AREA	PROVIDER	PROGRAM	SERVICE	ELIGIBILITY	CAPACITY	EMAIL	DISTANCE	USAGE THIS MONTH	PHONE	ENTITYID
Adult Education	Out of Network, 1005 Tillman Street, MEMPHIS	Out of Network Referral	Adult Education Referral			eric.burden@uwmidsouth.org		0	901-433-4351	27777
Childcare	Out of Network, 1005 Tillman Street, MEMPHIS	Out of Network Referral	Childcare Referral			eric.burden@uwmidsouth.org		0	901-433-4351	27777
Childrens Education	Out of Network, 1005 Tillman Street, MEMPHIS	Out of Network Referral	Children's Education Referral			eric.burden@uwmidsouth.org		0	901-433-4351	27777

- ***The provider table will filter to only 'Out of Network' providers. There is one out-of-network provider for each service area.***

SERVICE AREA	PROVIDER	PROGRAM	SERVICE	ELIGIBILITY	CAPACITY	EMAIL	DISTANCE	USAGE THIS MONTH	PHONE	ENTITYID
Adult Education	Out of Network, 1005 Tillman Street, MEMPHIS	Out of Network Referral	Adult Education Referral			eric.burden@uwmidsouth.org		0	901-433-4351	27777
Childcare	Out of Network, 1005 Tillman Street, MEMPHIS	Out of Network Referral	Childcare Referral			eric.burden@uwmidsouth.org		0	901-433-4351	27777
Childrens Education	Out of Network, 1005 Tillman Street, MEMPHIS	Out of Network Referral	Children's Education Referral			eric.burden@uwmidsouth.org		0	901-433-4351	27777

- ***Select the out-of-network provider with the service area most appropriate for the out-of-network referral. The window will close and you will be taken back to the referral form.***

Program	Out of Network Referral	Email	eric.burden@uwmidssouth.org
Service	Childcare Referral	Phone Number	901-433-4351
Provider Address	1005 Tillman Street, MEMPHIS, TN 38112		
		View/Upload Documents	

ⓘ To send a referral outside the DTD network, you **MUST** enter a valid e-mail address and indicate the name of the service provider. By default, the referral email will be sent to your email address. If you do not forward this email or enter the provider's email address, the out-of-network provider will not receive any notification of this referral.

Out-of-Network ★ Provider Name		Out-of-Network ★ Provider Email	candace.sanders@uwmidssouth.org
-----------------------------------	--	------------------------------------	---------------------------------

- ***The information for the out-of-network provider will be auto-populated. Below the provider information, the fields 'Out-of-Network Provider Name' and 'Out-of-Network Provider Email' will appear.***

ⓘ To send a referral outside the DTD network, you **MUST** enter a valid e-mail address and indicate the name of the service provider. By default, the referral email will be sent to your email address. If you do not forward this email or enter the provider's email address, the out-of-network provider will not receive any notification of this referral.

Out-of-Network ★ Provider Name		Out-of-Network ★ Provider Email	candace.sanders@uwmidssouth.org
-----------------------------------	--	------------------------------------	---------------------------------

- ***The 'Out-of-Network Provider Name' is the provider outside of the DTD network who will received this referral. Type the provider name into the 'Out-of-Network Provider Name' text box.***

ⓘ To send a referral outside the DTD network, you MUST enter a valid e-mail address and indicate the name of the service provider. By default, the referral email will be sent to your email address. If you do not forward this email or enter the provider's email address, the out-of-network provider will not receive any notification of this referral.

Out-of-Network ★
Provider Name  Out-of-Network ★
Provider Email

- ***The ‘Out-of-Network Provider Email’ is the email of the individual outside of the DTD network who will received the referral information via email. This field defaults to your email. Type the email of the individual to receive the referral in the ‘Out-of-Network Provider Email’ text box.***
- ***Complete the rest of the out-of-network referral in the same manner as an in-network referral.***

Add a New Client Referral – Referral for a Minor


⚠ I am consenting to allow agencies that are part of the DTD Network to share select pieces of information about me in order to provide high quality timely services. This information includes: 1) My contact information, 2) Information I provided on the Driving The Dream referral form and/or intake form, 3) Assessments that would be helpful to other service providers so that I do not need to share the same information again, 4) DTD-related consent forms, 5) Results of referrals to service providers or meetings with my Care Coordinator.

⚠ This client is below the age of consent. Please indicate which household adult is providing consent on this client's behalf.

Client Consent ★ ☐ Consenting Adult ★

Client Name Client Age

- ***To create a referral for a Client that is a minor, complete the steps for ‘Add a New Client Referral – Existing DTD Agencies’ up until the point of the referral form. If the client is under the age of 16, referral consent must be completed on behalf of the client by an Adult.***

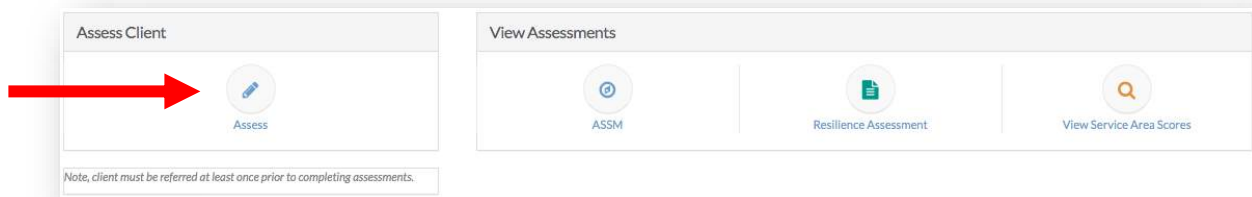
 Consenting Adult ★

Client Age

ing referred to, if appl...

- **To indicate the family member providing consent, click the ‘Consenting Adult’ field. A drop-down list will appear of the Client’s family members. Select the adult providing consent.**
- **Complete the rest of the referral for a minor in the same manner as an in-network referral.**

Assess a Client



- **To add a new optional assessment, select the ‘Assess’ button under ‘Assess Client’ on the Client Dashboard. A client must have received at least one referral at any status before you can complete an assessment. You will begin the Assessment workflow.**

[+ All Questions](#)
[Filters](#)

Select an assessment, then click **Search** to see the list of Service Areas.
 Click on the Service Area name to add/edit the answers and score for that area.
 Or, click **All Questions** to answer the questions for all areas at once.

Assessment ID ★ 5/11/2020 - Referrals - During

Total Rows: 20 Q Search			
SERVICE AREA	SCORE	DESCRIPTION	DATE ENTERED
01. Income			
02. Employment			
03. Financial Management (Credit)			

- ***On the first form in the assessment workflow, you can completed the full ASSM assessment or you can assess a client for specific service areas.***

Total Rows: 20				Q Search
SERVICE AREA	SCORE	DESCRIPTION	DATE ENTERED	
01. Income				
02. Employment				
03. Financial Management (Credit)				

- ***To complete only a specific section of the ASSM, click the service area name on the right column of the table.***

Area 1 01. Income

Question	Yes	No
Does the household have any income (including public assistance)?	<input type="radio"/>	<input type="radio"/>

Score Values:
 Total Sum: 0.00

- ***A new window will appear with ASSM questions for that particular service area. Depending on how a Client answers, more questions may appear. You must complete all questions that appear. After completing all questions, click 'Save' at the bottom right hand corner of the assessment. The window will close and the score will now appear on the table.***

+ All Questions

Filters

Select an assessment, then click Search to see the list of Service Areas.
 Click on the Service Area name to add/edit the answers and score for that area.
 Or, click All Questions to answer the questions for all areas at once.

Assessment ID ★

5/11/2020 - Referrals - During

- ***To complete the full ASSM assessment, select the ‘All Questions’ button in the upper right hand corner of the form.***

Area 1 01. Income

Question	Yes	No
Does the household have any income (including public assistance)?	<input type="radio"/>	<input type="radio"/>
Is the income adequate for meeting basic expenses (housing, childcare, transportation, food, etc.)?	<input type="radio"/>	<input type="radio"/>
Does income provide for savings or non-essential purchases?	<input type="radio"/>	<input type="radio"/>
Is income adequate and stable?	<input type="radio"/>	<input type="radio"/>

Score Values:
 Total Sum: 0.00

Area 2 02. Employment

Question	Yes	No
Does the client have a job?	<input type="radio"/>	<input type="radio"/>
Is the job full-time?	<input type="radio"/>	<input type="radio"/>
Does the full-time job pay adequately and provide benefits?	<input type="radio"/>	<input type="radio"/>
Is the full-time job permanent?	<input type="radio"/>	<input type="radio"/>

Score Values:
 Total Sum: 0.00

- ***A new window will appear with a complete Arizona Self-Sufficiency Assessment. After you complete the questions for each section, a ‘Score Value’ will generate for that section. The higher the score, the more self-sufficient the client in that domain. After completing all questions, click ‘Save’ at the bottom right hand corner of the assessment.***

18. Legal

19. Parenting Skills

20. Life Skills

✓ Done

- ***Once finished with the ASSM, click 'Done' in the lower right hand corner of the form.***

Assessment ★

5/11/2020 - Referrals - During

Resilience Assessments (Adverse Childhood Experiences, Herth Hope Index, Child/You Resilience, Adult Resilience)
Select 'No' on the Opt-Out drop-down for each assessment to be completed, then fill in the date and answer the questions.

Client Opted Out of ACE Assessment

Opted Out of Herth Hope Index

Opted Out of Child/Youth Resilience

Opted Out of Adult Resilience

- ***The second form of the assessment workflow will appear. This form contains the Adverse Childhood Experience (ACE) Assessment, Herth Hope Index, Child/Youth Resilience Assessment, and the Adult Resilience Assessment.***

Client Opted Out of ACE Assessment

Opted Out of Herth Hope Index

Opted Out of Child/Youth Resilience

Opted Out of Adult Resilience

- **To complete any of the assessments, click the drop down menu to the right of 'Client Opted out of ...'. Select 'No' from the drop down list.**

Client Opted Out of ACE Assessment: No

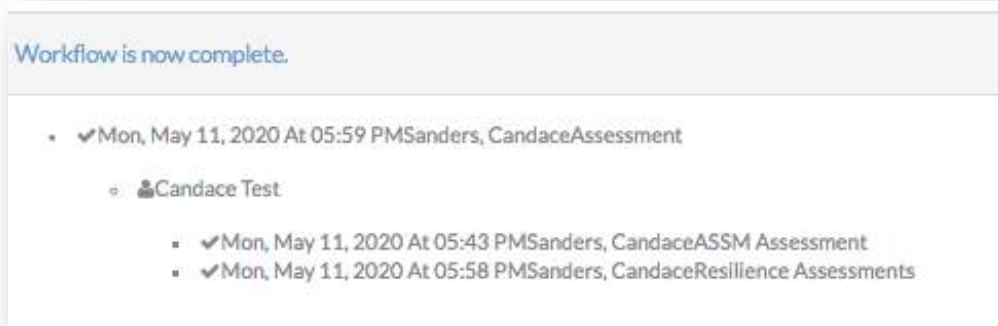
Date Completed ACE Assessment: 05/11/2020

ACE: Adverse Childhood Experiences

Question	Yes	No
Did A Parent Or Other Adult In The Household Often: Swear At You, Insult You, Put You Down, Or Humiliate You? Or Act In A Way That Made You Afraid That You Might Be Physically Hurt? ★	<input type="radio"/>	<input type="radio"/>
Did A Parent Or Other Adult In The Household Often: Push, Grab, Slap, Or Throw Something At You? Or Ever Hit You So Hard That You Had Marks Or Were Injured? ★	<input type="radio"/>	<input type="radio"/>
Did An Adult Or Person At Least 5 Years Older Than You Ever: Touch Or Fondle You Or Have You Touch Their Body In A Sexual Way? Or Try To Or Actually Have Oral, Anal, Or Vaginal Sex With You? ★	<input type="radio"/>	<input type="radio"/>
Did You Often Feel That: No One In Your Family Loved You Or Thought You Were Important Or Special? Or Your Family Didn't Look Out For Each Other, Feel Close To Each Other, Or Support Each Other? ★	<input type="radio"/>	<input type="radio"/>
Did You Often Feel That ... You Didn't Have Enough To Eat, Had To Wear Dirty Clothes, And Had No One To Protect You? Or Your Parents Were Too Drunk Or High To Take Care Of You Or Take You To The Doctor If You Needed It? ★	<input type="radio"/>	<input type="radio"/>
Were Your Parents Ever Separated Or Divorced? ★	<input type="radio"/>	<input type="radio"/>
Was Your Mother Or Stepmother: Often Pushed, Grabbed, Slapped, Or Had Something Thrown At Her? Or Sometimes Or Often Kicked, Bitten, Hit With A Fist, Or Hit With Something Hard? Or Ever Repeatedly Hit Over At Least A Few Minutes Or Threatened With A Gun Or Knife? ★	<input type="radio"/>	<input type="radio"/>
Did You Live With Anyone Who Was A Problem Drinker Or Alcoholic Or Who Used Street Drugs? ★	<input type="radio"/>	<input type="radio"/>
Was A Household Member Depressed Or Mentally Ill Or Did A Household Member Attempt Suicide? ★	<input type="radio"/>	<input type="radio"/>
Did a household member go to prison? ★	<input type="radio"/>	<input type="radio"/>

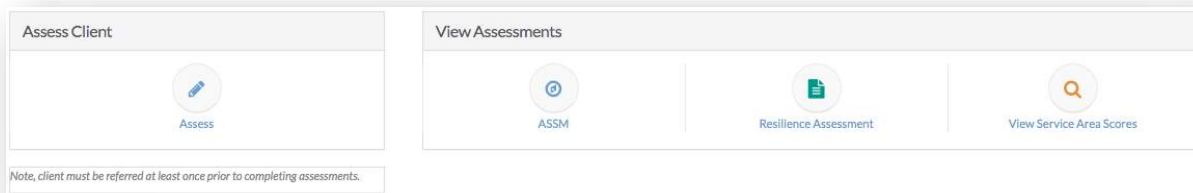
Score Values:
Total Sum: 0.00

- **The assessment will appear below the drop down list. The assessment date completed is defaulted to today's date, but can be edited. Complete all required questions for the assessment. After completing all questions, a 'Score Value' will be generated below the questions.**
- **After completing the desired optional assessments, click 'Save' in the lower right hand corner of the form.**

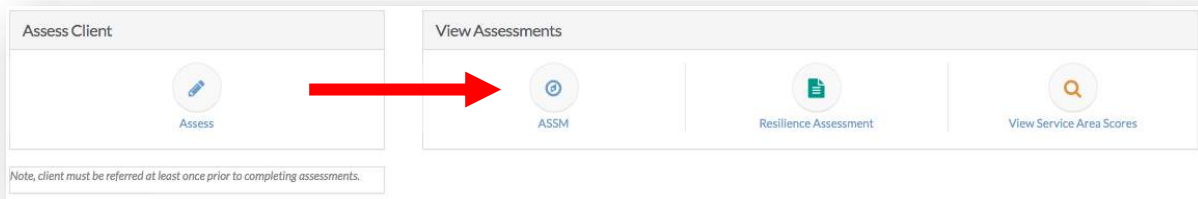


- **The assessment workflow is now complete.**

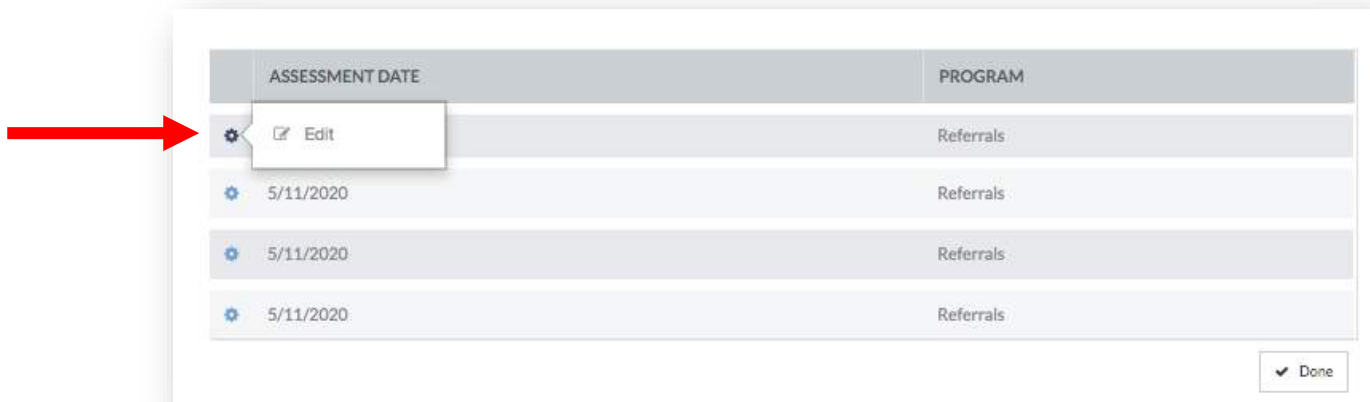
View Client Assessments



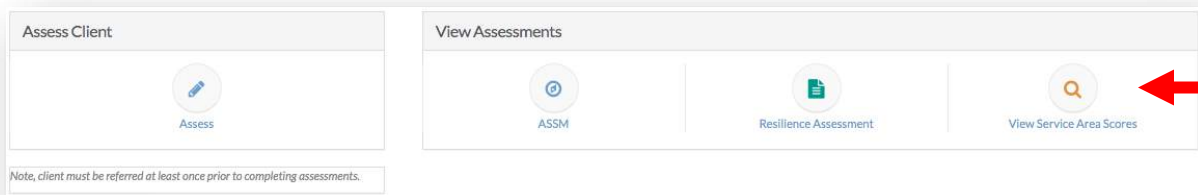
- **The View Assessments section of the Client Dashboard contains links to past ASSM and Resilience assessments as well as service area scores.**



- **To view past ASSM or Resilience assessments, select the corresponding button from the Client Dashboard.**

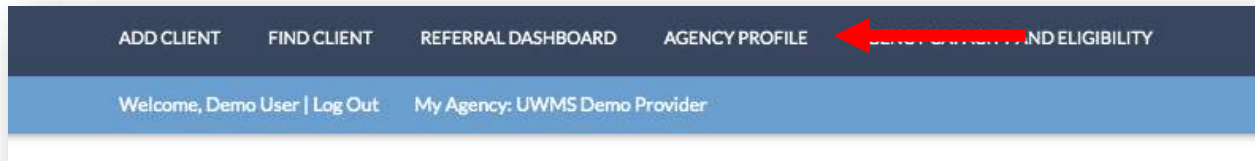


- **A table of previous assessments will appear. To view the assessment, select the gear in the left column and select 'Edit'.**



- **To view service area scores, select the 'View Service Area Scores' button. See 'Add a New Client Referral' for more information about service area scores.**


Agency Profile




- **To add view your agency's profile, click the 'Agency Profile' button located on the top navigational bar.**


A screenshot of the 'Agency Profile' form. The form is divided into three main sections, each with a dropdown arrow icon. The first section, 'Agency Name and Category', contains a text field for 'Agency Name' with the value 'UWMS Demo Provider'. The second section, 'Provider Location', contains several fields: 'Address' (1005 Tillman Street), 'Address 2' (2), 'Zip Code' (38112), 'City' (MEMPHIS), 'State' (TN), 'County/Neighborhood' (DELBLY ///), 'Longitude' (-89.839784), 'Latitude' (35.1005961), and a 'Geo Code' button labeled 'Verify Address'. There is also a checkbox for 'Use Physical Address as Mailing Address' which is checked. The third section, 'Please enter additional agency contact information below.', contains fields for 'Phone' (901-433-4863), 'Fax', 'Email' (eric.burden@uwmidssouth.org), 'Website URL', 'Confirm Email' (eric.burden@uwmidssouth.org), and 'Toll Free Number'.

- **The agency profile form contains the name, address, and contact information for your agency.**

 **Provider Location**

Address	<input type="text" value="1005 Tillman Street"/>	Address 2	<input type="text" value="2"/>
Zip Code	<input type="text" value="38112"/> 		
City	<input type="text" value="MEMPHIS"/>	State	<input type="text" value="TN"/>
County/Neighborhood	<input type="text" value="SHELBY ////"/>		
Longitude	<input type="text" value="-89.8397847"/>	Latitude	<input type="text" value="35.1005961"/>
Geo Code	Verify Address	Use Physical Address as Mailing Address	<input checked="" type="checkbox"/>

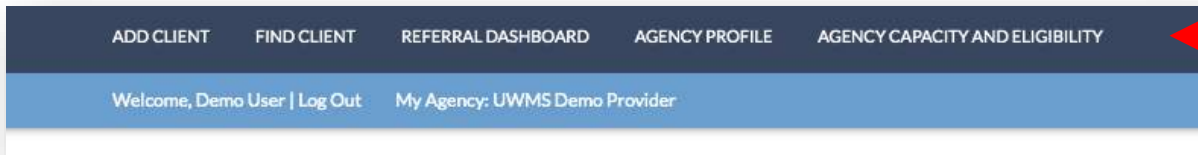
- ***To make any changes to your agency's location, use the fields in the 'Provide Location' section. Verify the address by clicking the 'Verify Address' button.***

 Please enter additional agency contact information below.

Phone	<input type="text" value="901-433-4863"/>	Fax	<input type="text"/>
Email	<input type="text" value="eric.burden@uwmidssouth.org"/>	Website URL	<input type="text"/>
Confirm Email	<input type="text" value="eric.burden@uwmidssouth.org"/>		
Toll Free Number	<input type="text"/>		

- ***To make any changes to your agency's primary contact information, use the fields in the bottom section of the agency profile form.***


Agency Capacity and Eligibility



- **To add view your agency's capacity and eligibility information, click the 'Agency Capacity and Eligibility' button located on the top navigational bar.**

	Program	Capacity	Eligibility	
	Demo - Childcare	15	Must think the agency leadership is both witty and charming.	
	Demo - Childcare	15	Must think the agency leadership is both witty and charming.	

- **A table will appear that will contain a row for each program your agency provides. This table will also contain capacity and eligibility information.**



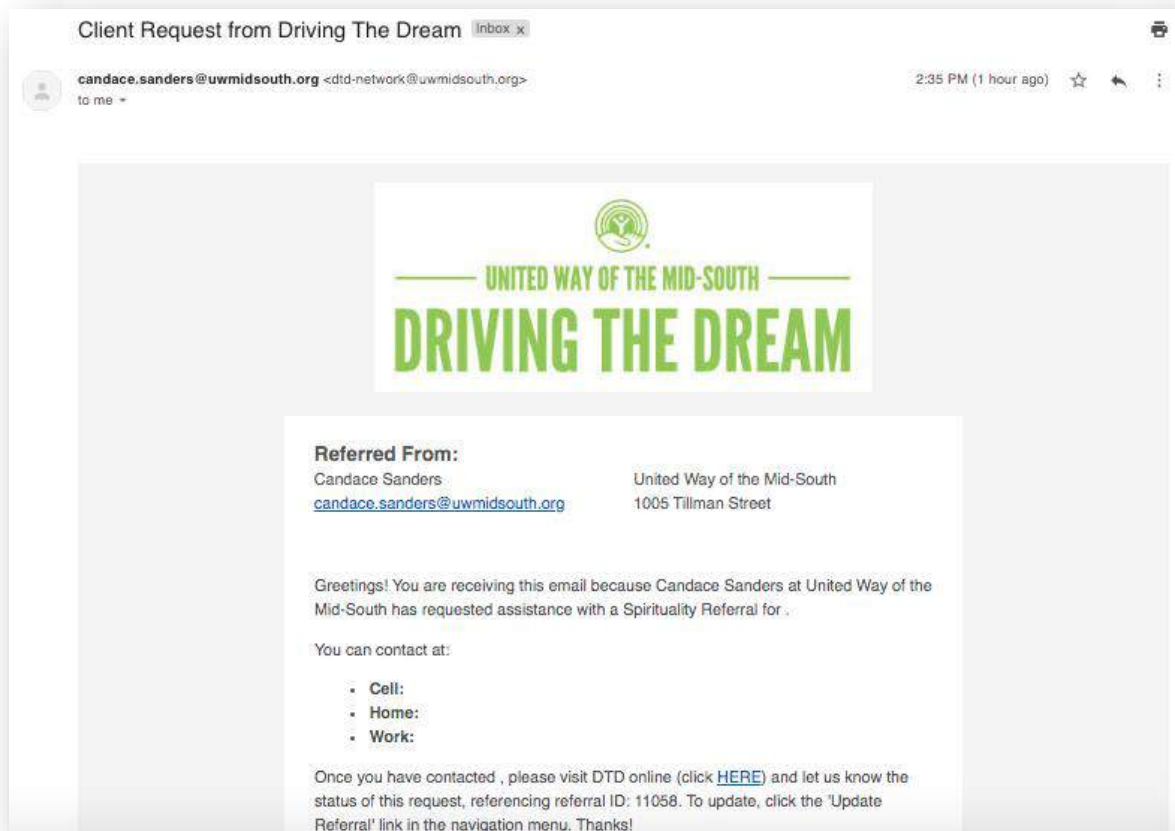
	Program	Capacity	Eligibility	
	Demo - Childcare	15	Must think the agency leadership is both witty and charming.	

- **To update the capacity and eligibility information for your agency, click the checkbox located on the left column of the table. The capacity and eligibility fields will turn white and become editable.**
- **The 'Capacity' field puts an upper limit to the amount of referrals your agency can receive in a month. This limit can be updated at any time.**

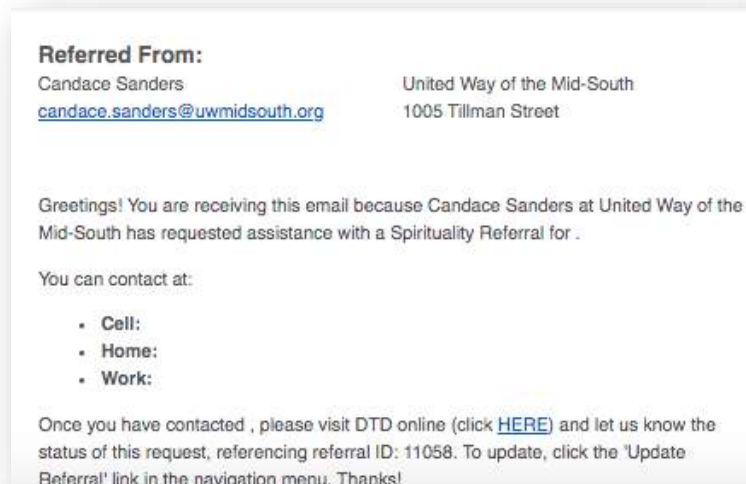
- ***The 'Eligibility' field is a text box. Your agency's eligibility information can be updated at any time.***

Out-of-Network Agencies

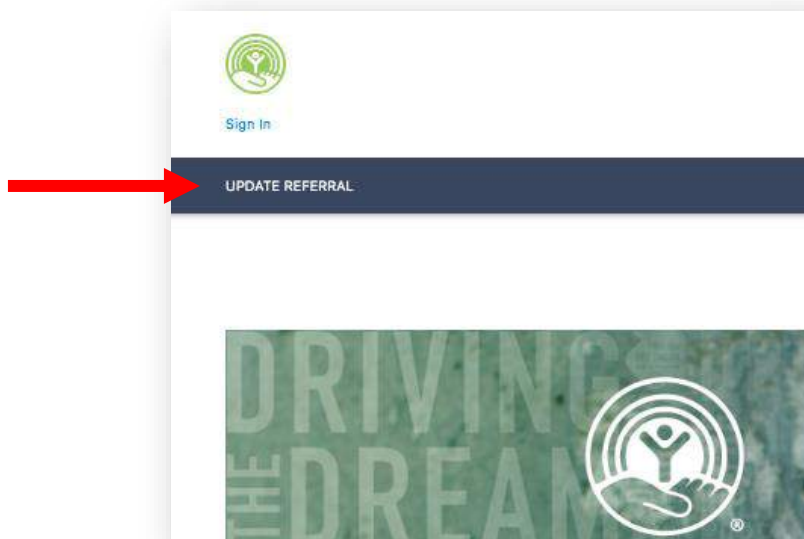
Update a Referral



- ***When an out-of-network agency received a referral through CaseWorthy, the individual identified through email will receive an email notification similar to the one above. See 'Add a New Referral – Out-of-Network' for more information on how to make an out-of-network referral.***



- ***This email contains information such as the Client's name, contact information, the referral service area, and the referral ID. It also contains a link to the CaseWorthy Portal.***



- ***To update a referral, select 'Update Referral' in the upper left hand corner of the screen below the 'Sign In' button.***

Enter the referral ID (from your email) into the box below, then click the 'Find Referral' button. If your referral ID is found, click the checkbox next to the referral information displayed, update the status, then click 'Update Referral'.

Enter Referral ID *

Find Referral

- ***A new form will appear. To search for the referral, type the referral ID located in the email in the 'Enter Referral ID' text box. Click the 'Find Referral' button.***

	Referral ID	Referral Date	Current Status	Referred From	Referred To
<input checked="" type="checkbox"/>	11058	5/13/2020 9:35 PM	Received	United Way of the Mid-South	Test

1

Update Referral

- ***A table containing the referral will now appear. To make a status update to the referral, click the checkbox located in the left-hand column.***

	Referral ID	Referral Date	Current Status	Referred From	Referred To
<input checked="" type="checkbox"/>	11058	05/13	<div>Received</div> <div> --Nothing-- Sent Warm Hand-Off Received At Capacity Pending - In Contact Pending - Screening for Enrollment </div>	United Way of the Mid-S	Test

Update Referral

- ***The 'Current Status' field will now appear white with a drop-down option. Click the drop-down and select the referral status most appropriate for this referral. Click the 'Update Referral' button in the lower left hand corner.***

app.caseworthy.com says
Referral Successfully Updated

OK

- ***A new browser window will appear confirming the referral was updated successfully. Click 'OK'. You will be redirected to the CaseWorthy Portal homepage.***