United Way of the Mid-South
Driving the Dream
CaseWorthy User Guide

Referral Network Partners

May 2020

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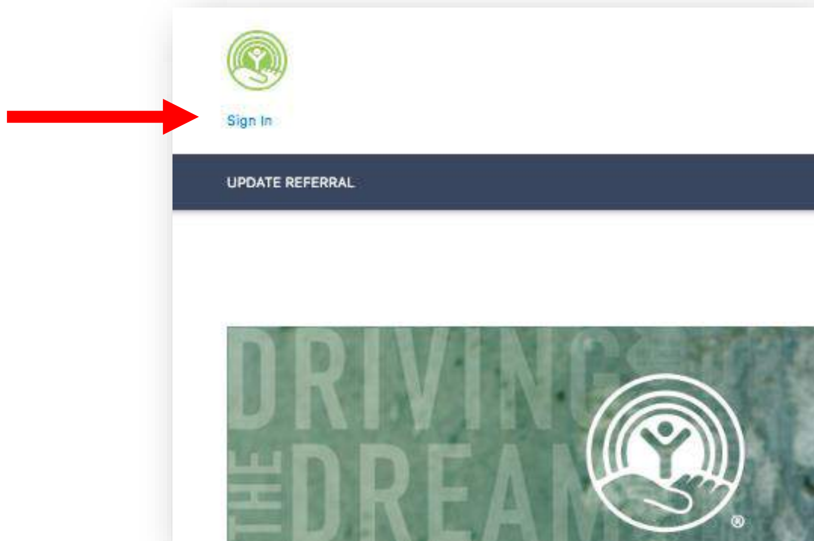
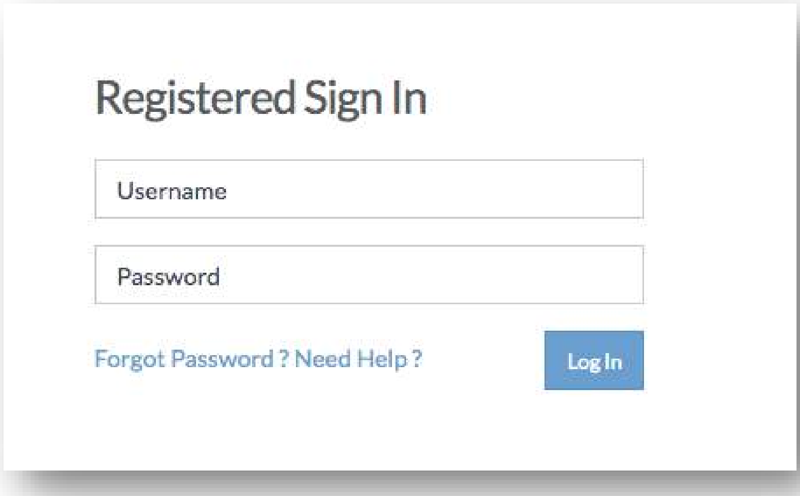
Navigating the CaseWorthy Portal

Logging into the Portal

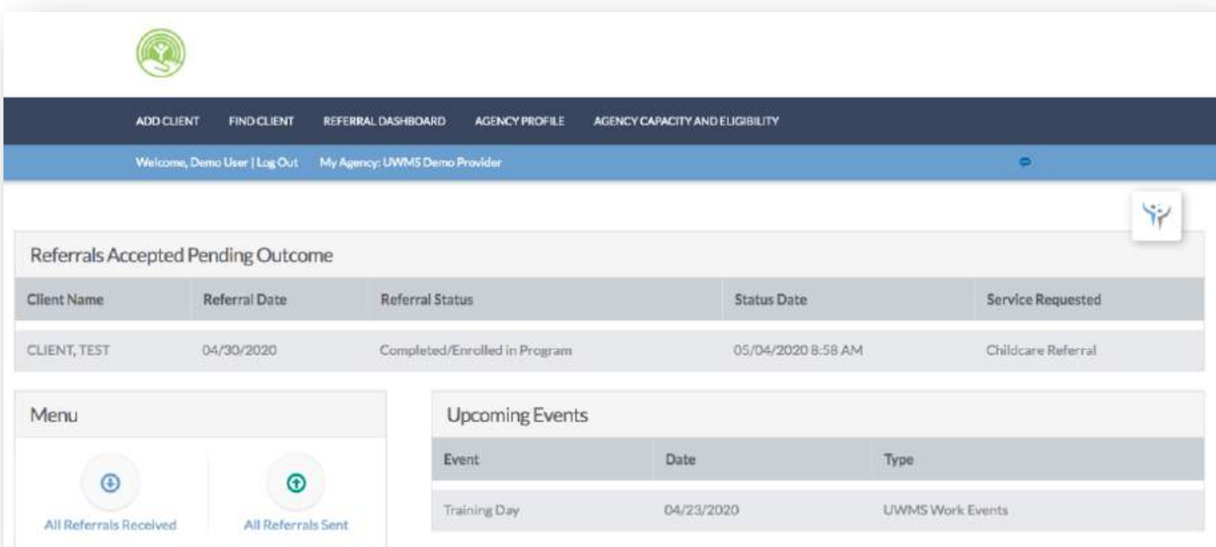
- ***The Driving the Dream CaseWorthy Portal can be accessed at https://app.caseworthy.com/UnitedWayMidSouth_prod.portalnew***



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



- ***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.***

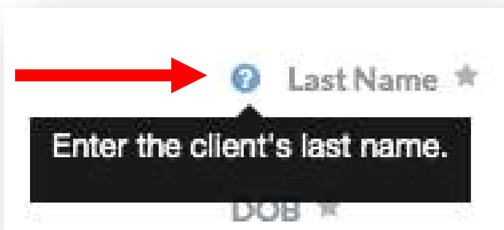


- ***After successfully logging in, you will see a screen similar to the one above. The default page after logging in is the Referral Dashboard.***

Symbols

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

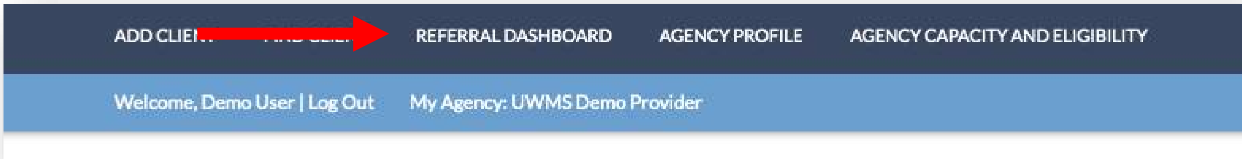
- ***The light bulb proceeds text describing the purpose of the form currently in view.***



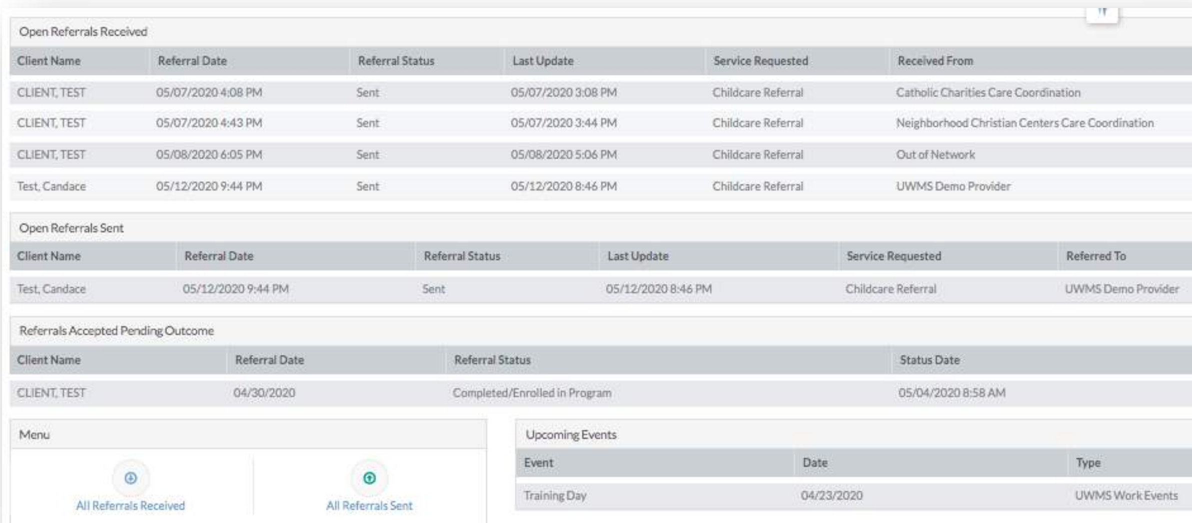
- ***When you hover your cursor over the question mark symbol, a text pop-up appears with more information about that field.***

- ***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.***



- ***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

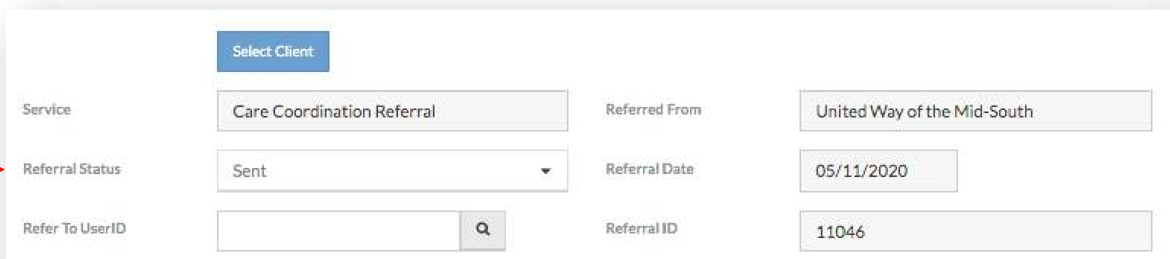
Client Name	Referral Date	Referral Status	Last Update	Service Requested	Referred To
Test, Candace	05/12/2020 9:44 PM	Sent	05/12/2020 8:46 PM	Childcare Referral	UWMS Demo Provider

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

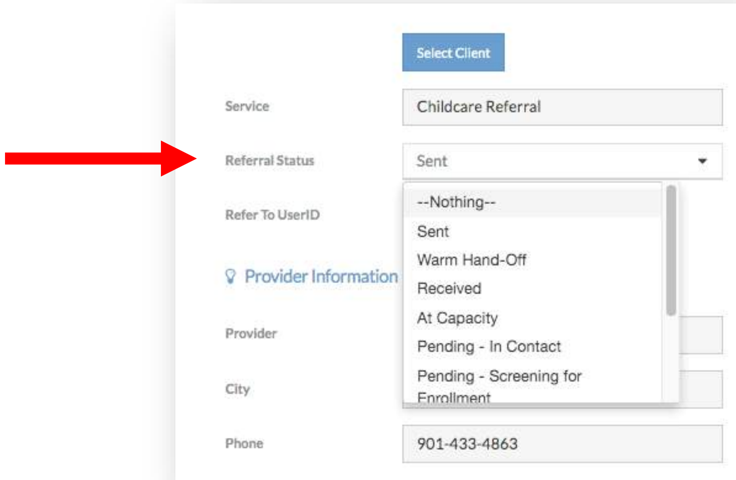
Open Referrals Received

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

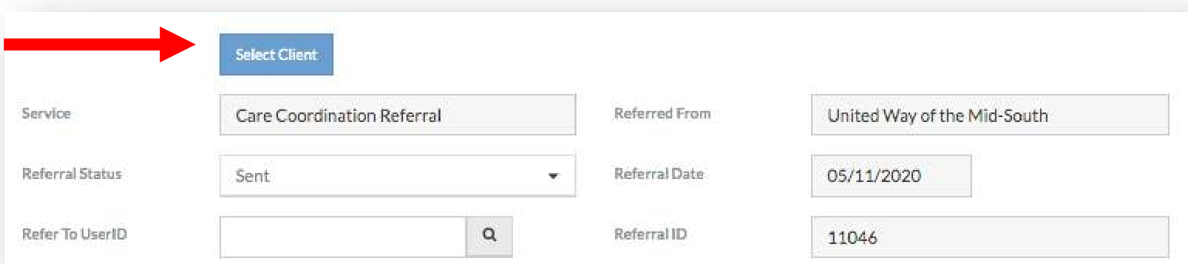
- ***To update the status of an open referral received or an open referral sent, click on the row containing the referral.***



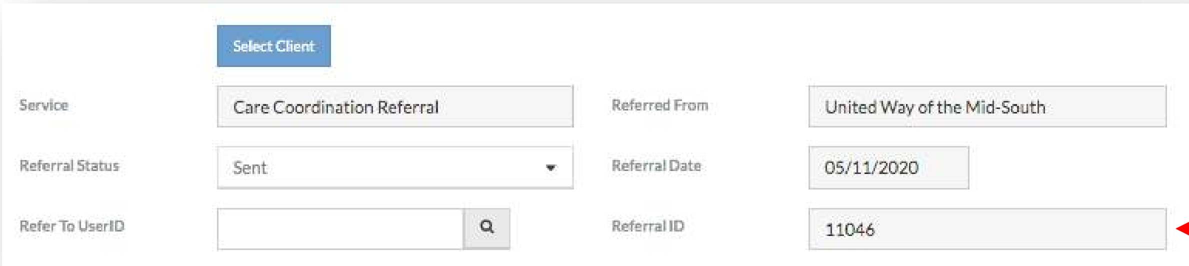
- ***The referral form for that referral will appear. You cannot make edits to most fields on the completed referral form, with the exception of 'Referral Status'. See 'Add a New Client Referral' for more information about the referral form.***



- ***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.***



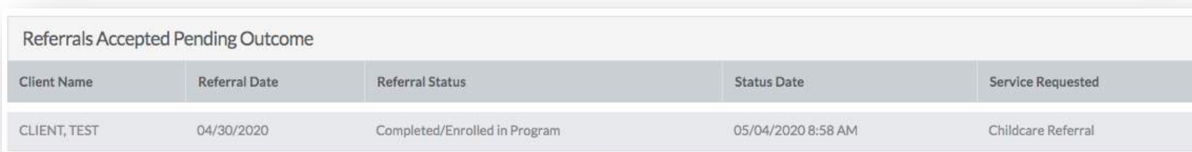
- ***At the top of the Client referral form, there is a 'Select Client' button. This button will select this Client and take you to the Client Dashboard. See 'Client Dashboard' for more information.***


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		Referral ID	11046

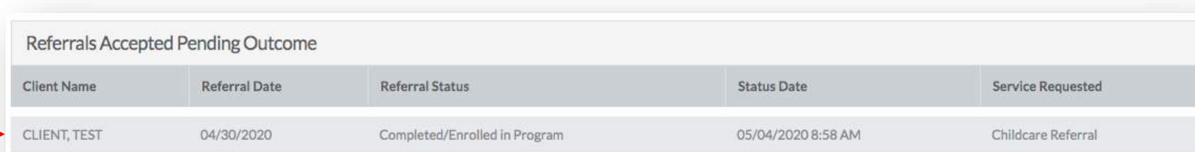
- ***The referral form contains a record of the 'Referral ID' as display only.***

Referrals Accepted Pending Outcome


Referrals Accepted Pending Outcome

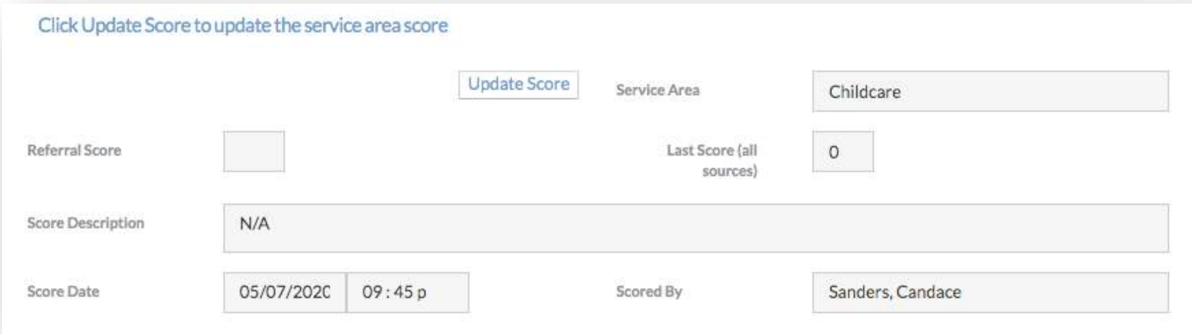
Client Name	Referral Date	Referral Status	Status Date	Service Requested
CLIENT, TEST	04/30/2020	Completed/Enrolled in Program	05/04/2020 8:58 AM	Childcare Referral

- ***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

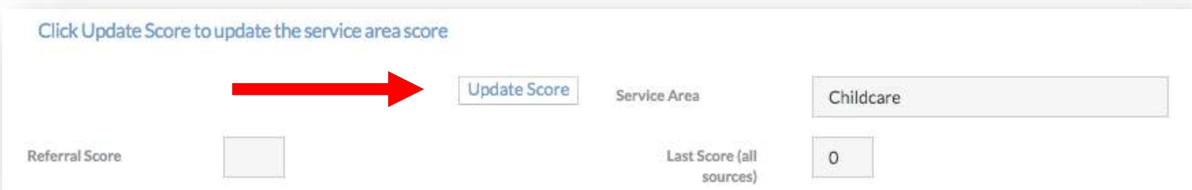
Client Name	Referral Date	Referral Status	Status Date	Service Requested
CLIENT, TEST	04/30/2020	Completed/Enrolled in Program	05/04/2020 8:58 AM	Childcare Referral

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


Click Update Score to update the service area score

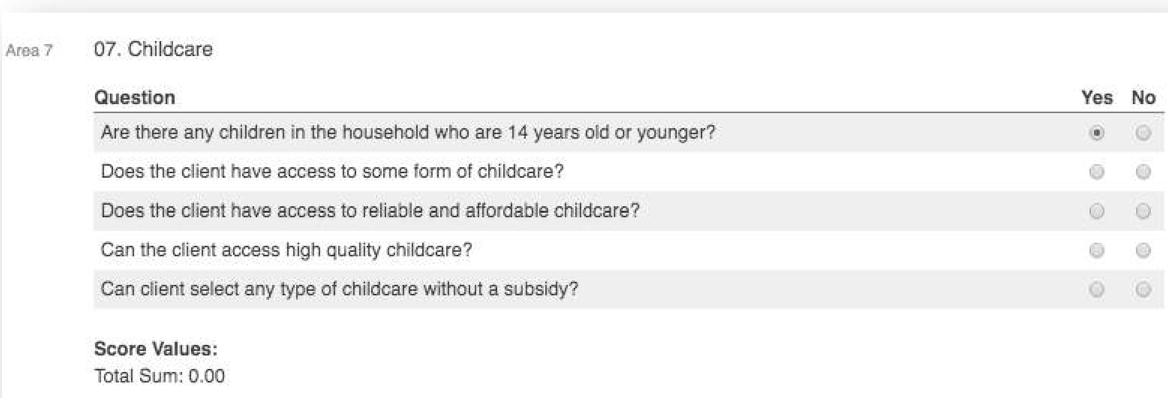
	Update Score	Service Area	Childcare
Referral Score		Last Score (all sources)	0
Score Description	N/A		
Score Date	05/07/202C 09 : 45 p	Scored By	Sanders, Candace

- ***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.***

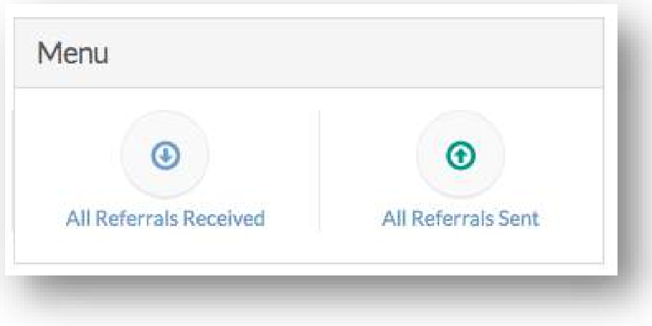

Area 7 07. Childcare

Question	Yes	No
Are there any children in the household who are 14 years old or younger?	◉	○
Does the client have access to some form of childcare?	○	○
Does the client have access to reliable and affordable childcare?	○	○
Can the client access high quality childcare?	○	○
Can client select any type of childcare without a subsidy?	○	○

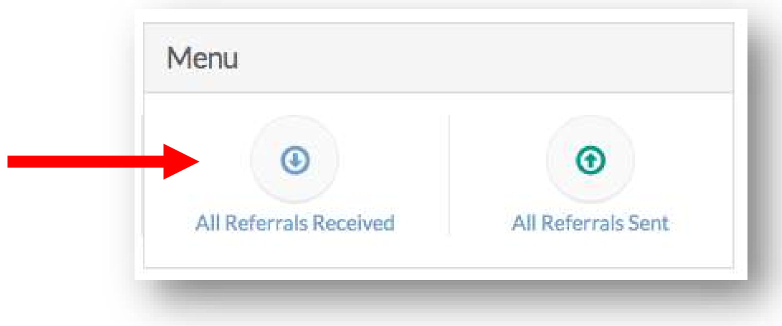
Score Values:
Total Sum: 0.00

- ***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.***

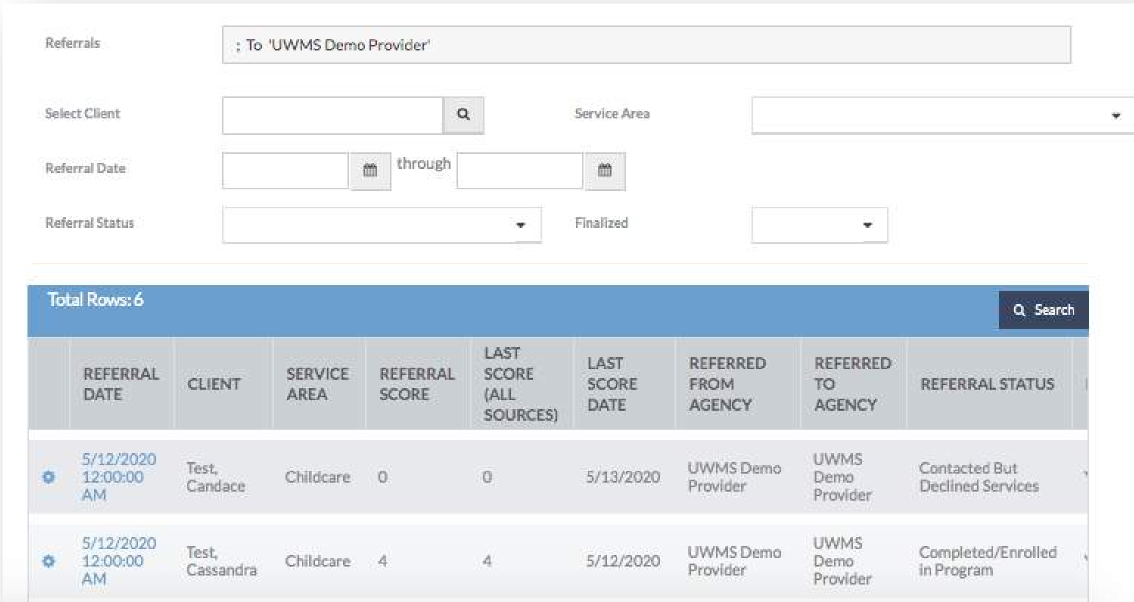
All Referrals Sent and Received



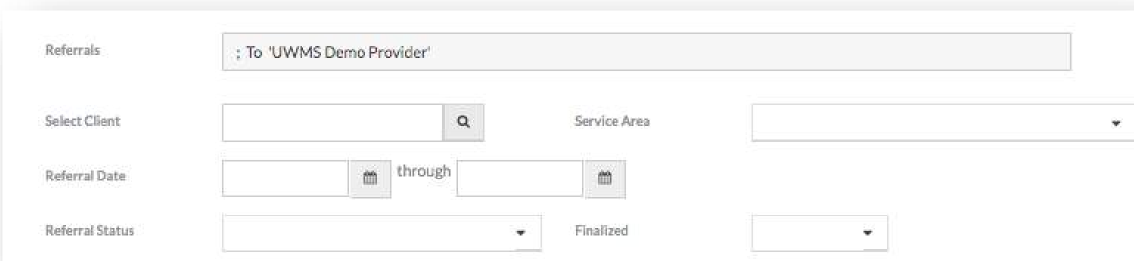
- ***The 'Menu' section of the Referral Dashboard allows you to view the complete history of referrals for your agency, regardless of the status of a referral. That history is divided by referrals received and referrals sent.***



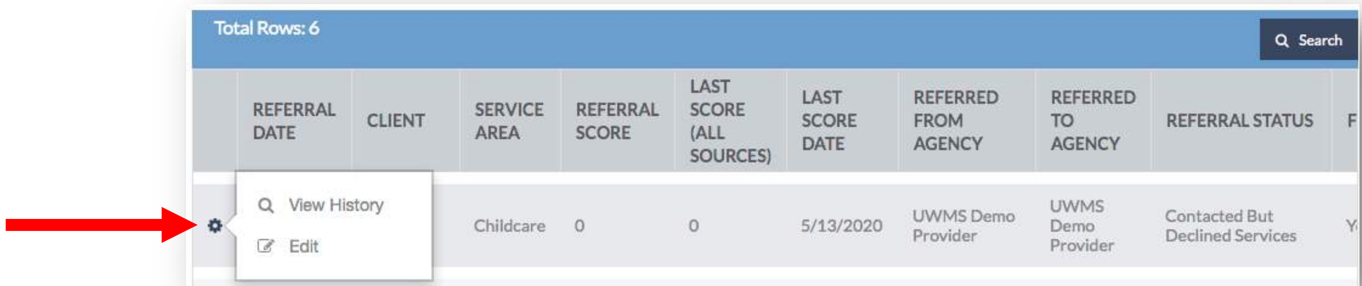
- ***To view your agency's complete history of referrals received, click the 'All Referrals Received' button. All features of 'All Referrals Received' are available in 'All Referrals Sent'.***



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

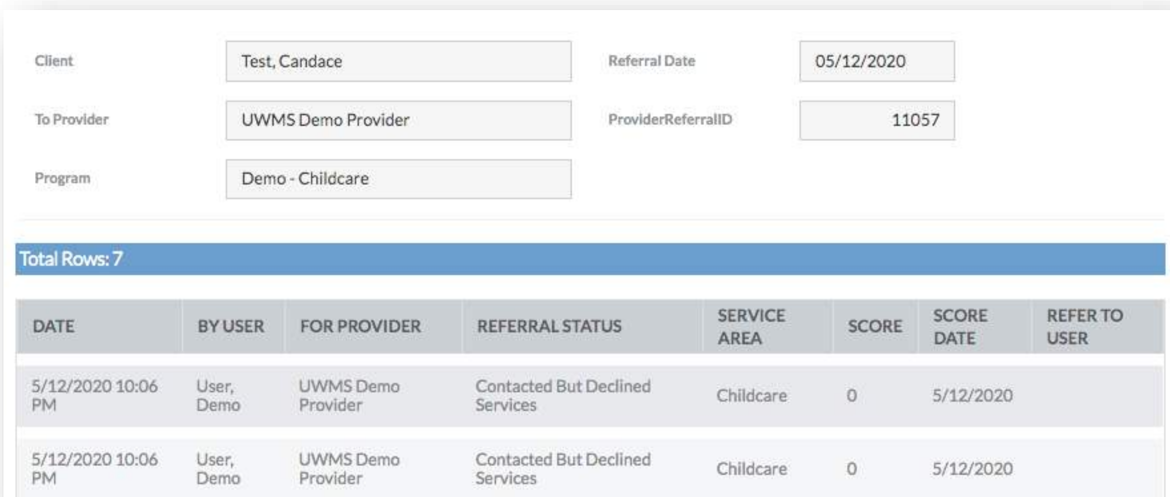


- ***To filter the table, use the fields available above the table. You can filter the table by searching for a specific client, the service area associated with the referral, the date of the referral, the status of the referral, and whether the referral has reached a finalized status.***



- ***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'.***



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

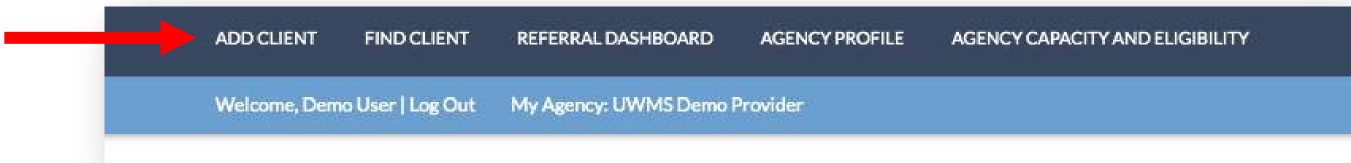
Upcoming Events

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.***

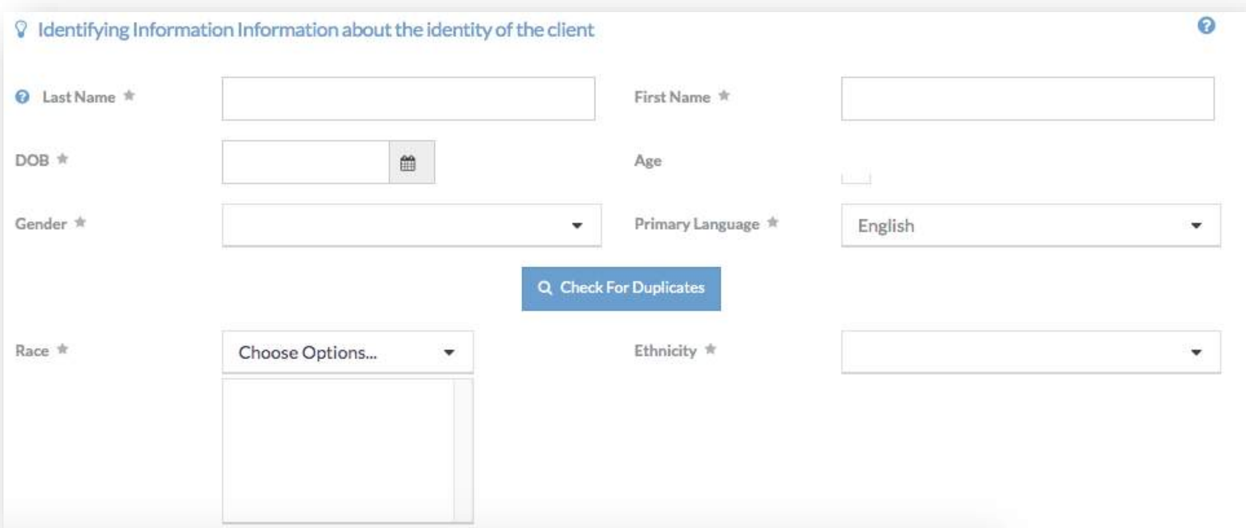
Add a New Client



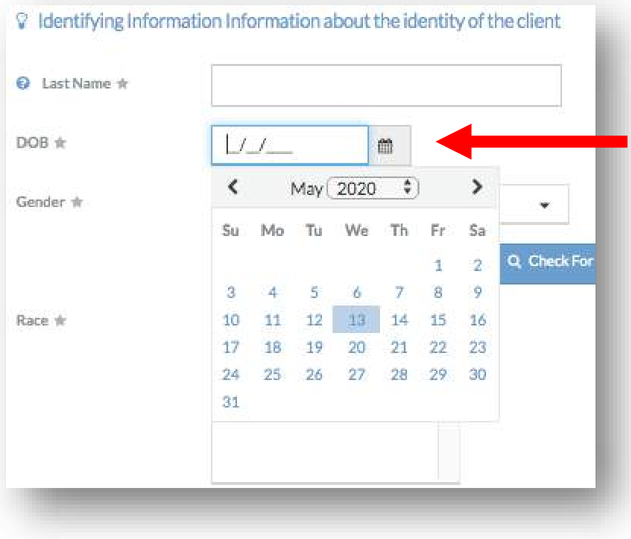
- ***To add a new client, click the 'Add Client' button located on the top navigational bar.***

- ***You will now begin the 'Add Client' Workflow.***

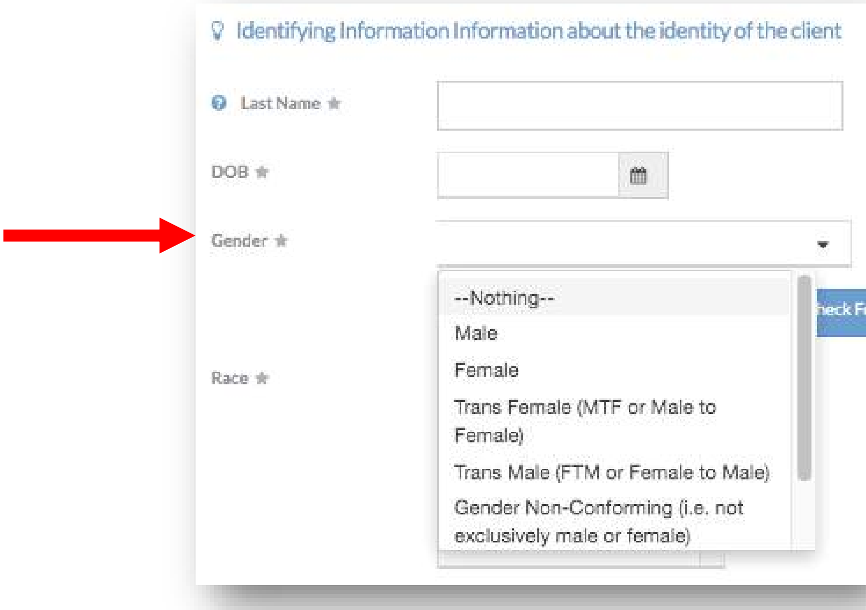
Client Demographics



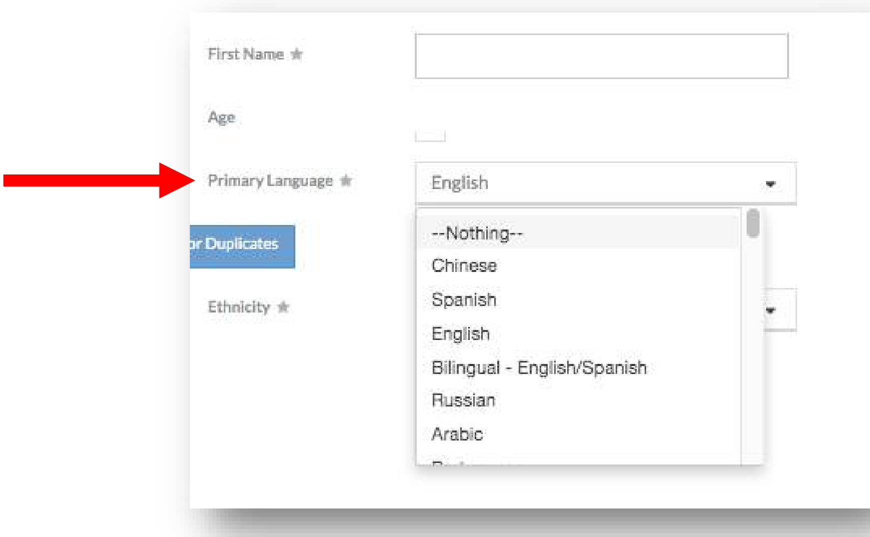
- ***The required client demographics include first and last name, date of birth, gender identification, primary language, race identification, and ethnicity.***



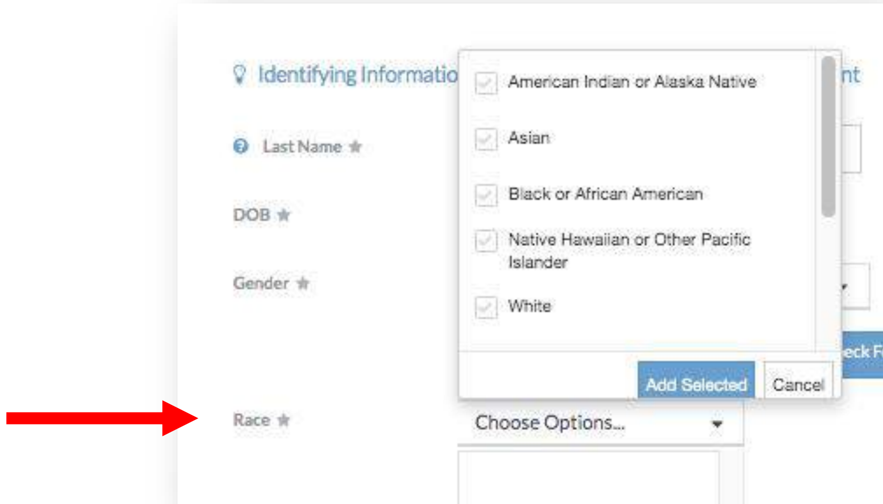
- ***To add the Client's date of birth, click in the 'DOB' field. You can type in the date of birth using the mm/dd/YYYY format. You can also add the date of birth by clicking the calendar icon on the left side of the field. This will pop open a calendar where you can select a date.***
- ***Age is a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



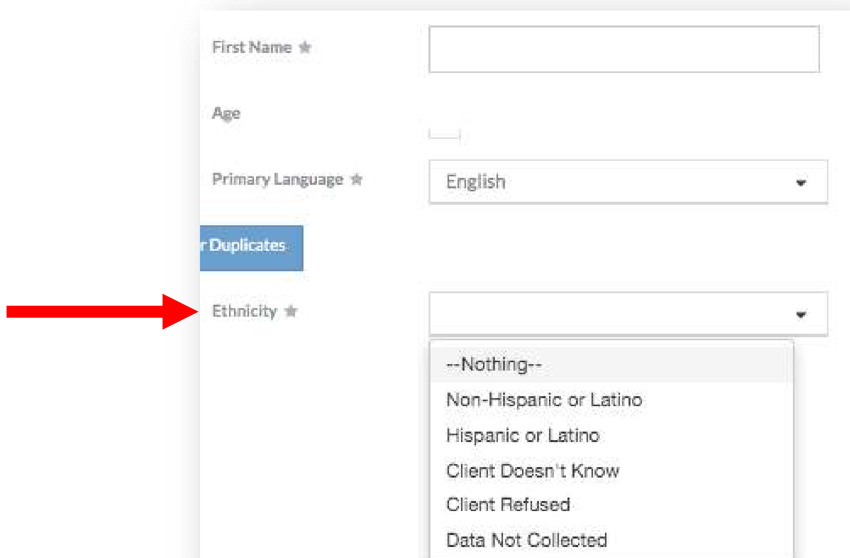
- ***To add a Client's gender identification, click the 'Gender' drop-down list. Select the option that best fits your client. Options include 'Client Doesn't Know' and 'Client Refused'.***



- ***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'.***

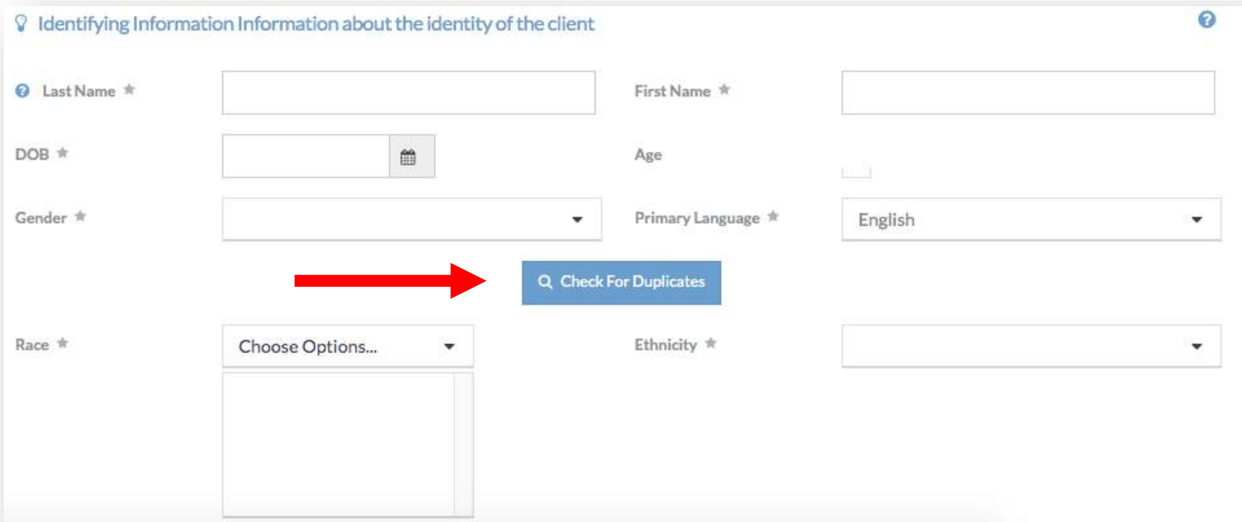


- ***To identify a Client's Race, click the 'Chose Options' drop-down list next to 'Race'. Select all applicable race identifications and click 'Add Selected' at the bottom of the menu. Race options include 'Client Doesn't Know', 'Client Refused', 'Other', and 'Data Not Collected'.***



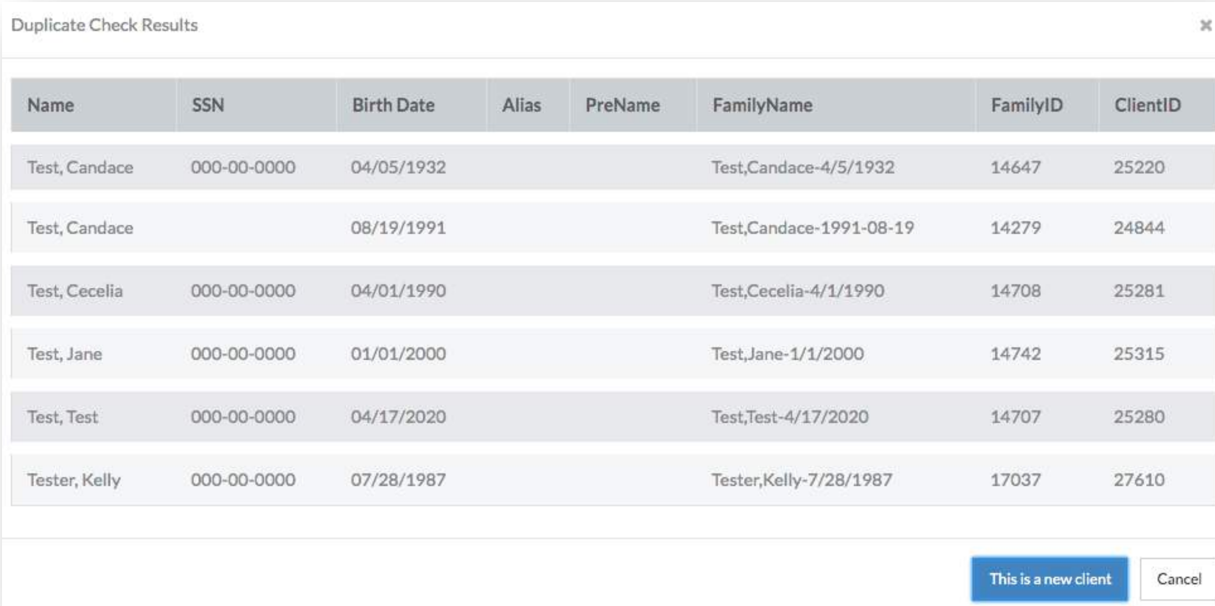
- ***To identify a Client's Ethnicity, select the 'Ethnicity' drop-down list. Select the option most appropriate for your client. Options include 'Client Doesn't Know', 'Client Refused', and 'Data Not Collected'.***

Check for Duplicates



- ***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.***



Duplicate Check Results

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

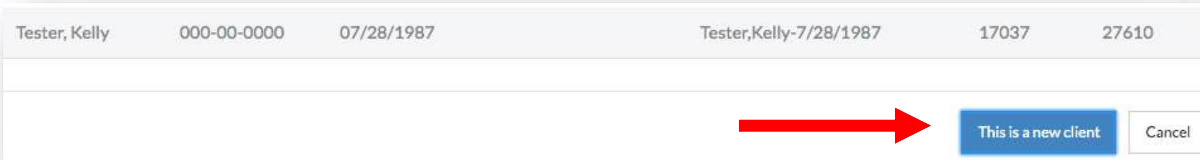
This is a new client Cancel

- ***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.***

Duplicate Check Results

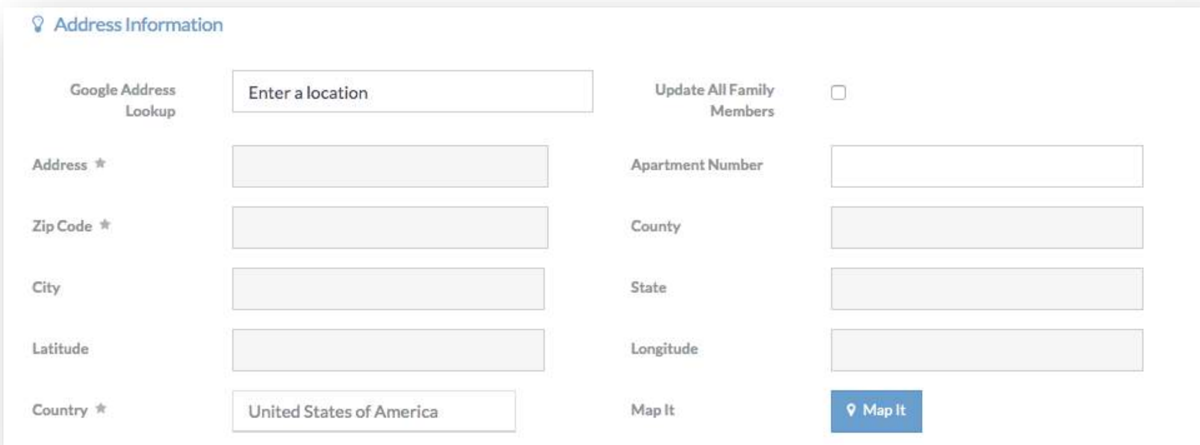
Name	SSN	Birth Date	Alias	PreName	FamilyName	FamilyID	ClientID
Test, Candace	000-00-0000	04/05/1932			Test,Candace-4/5/1932	14647	25220

- ***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.***

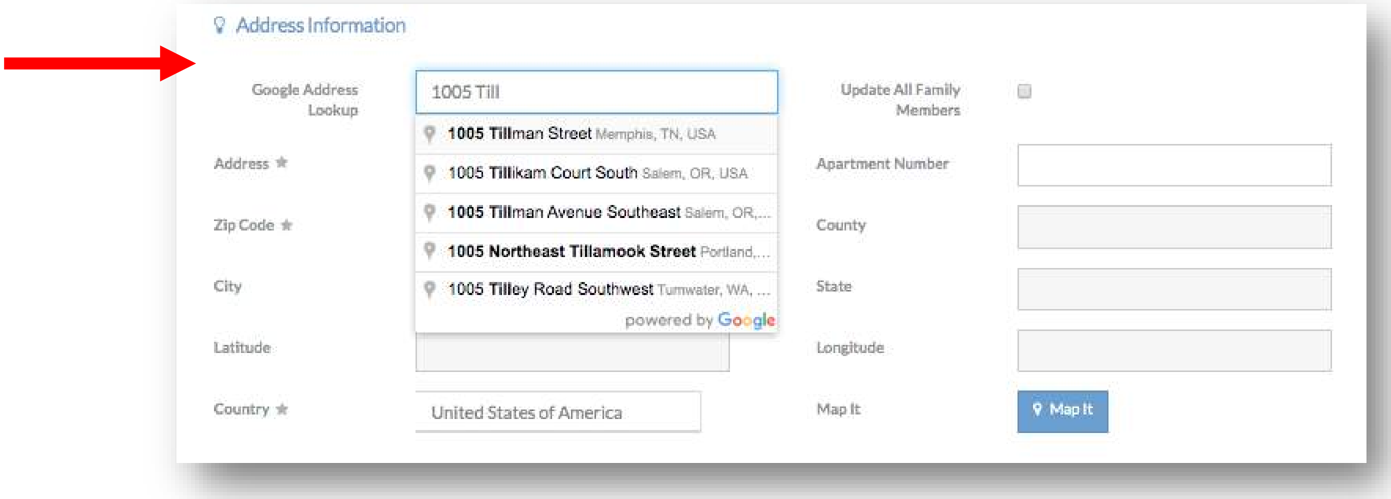


- ***If a profile matching your client does not appear, select 'This is a new client' at the bottom left-hand corner of the window. The window will close and you will need to complete the remaining fields on this form. The 'Check for Duplicates' button will no longer appear.***

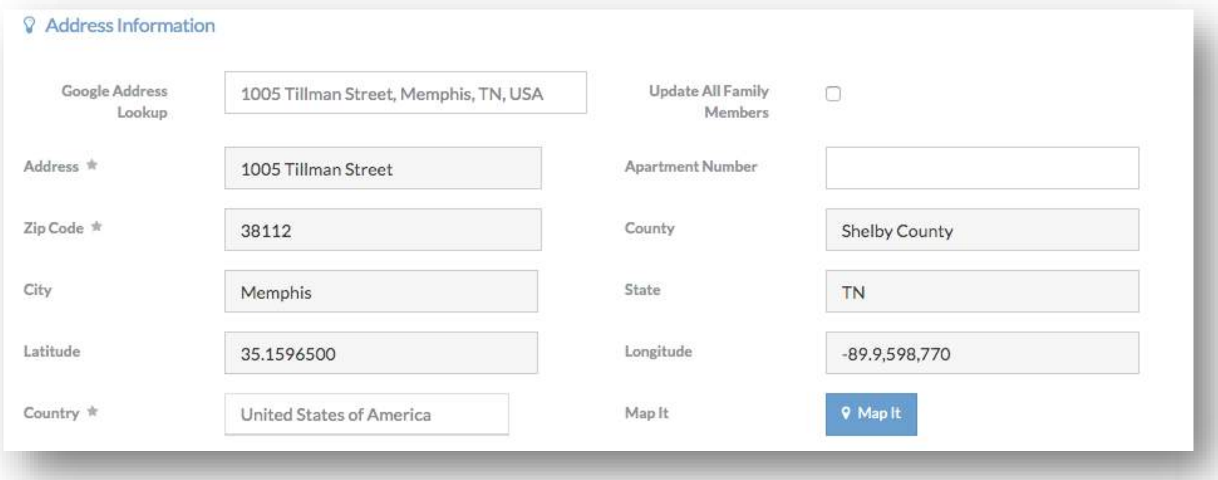
Address Lookup



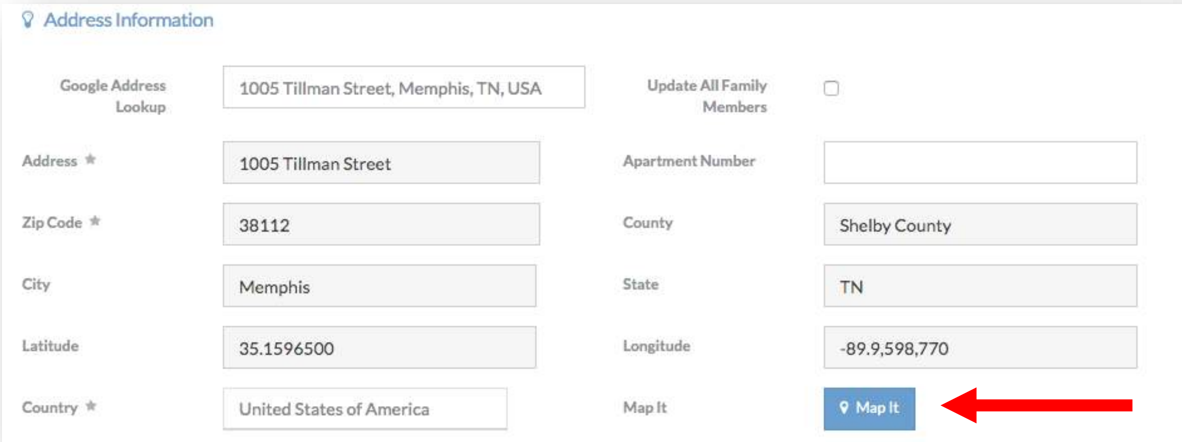
- ***To complete the address information for a client, you are required to use the 'Google Address Lookup' field. This ensures that an address is real and eliminates data entry errors.***



- ***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.***

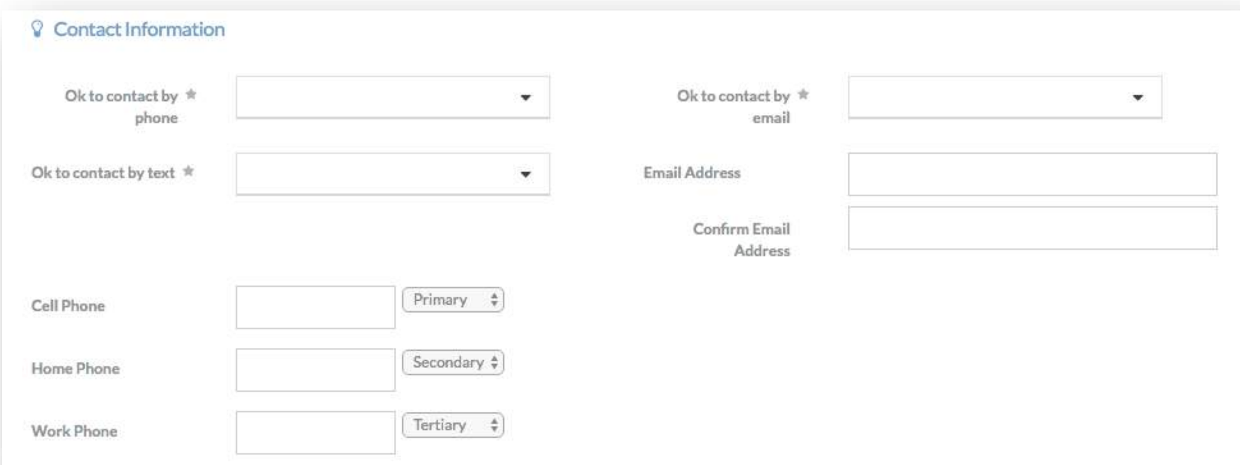


- ***After selecting the correct address, all other address fields will be auto populated in the address information section.***



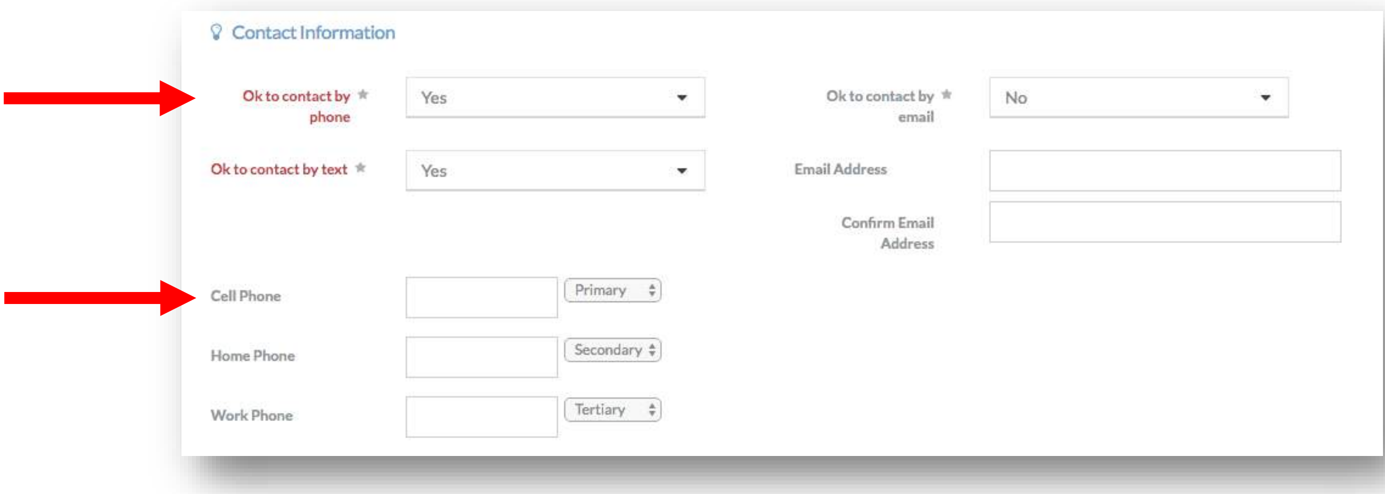
- ***If you click the 'Map It' button, a Bing map window will appear with a map of the address selected.***

Contact Information

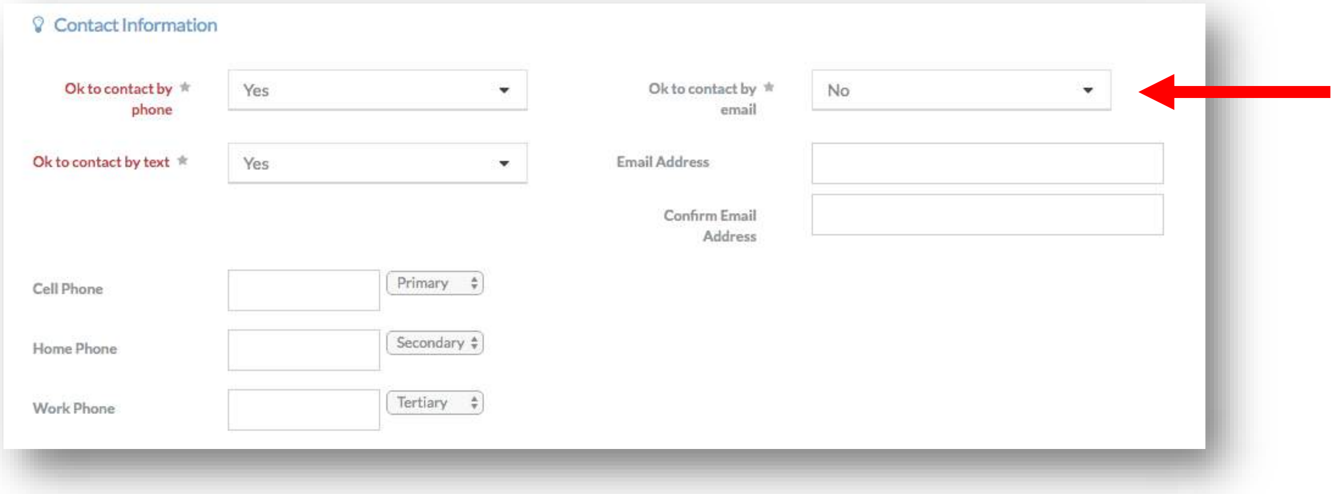


- ***The Client contact information indicates the preferred method Agencies will contact this Client. You must include at least one method of contact for a Client.***

- ***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.***



- ***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.***



- ***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.***

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

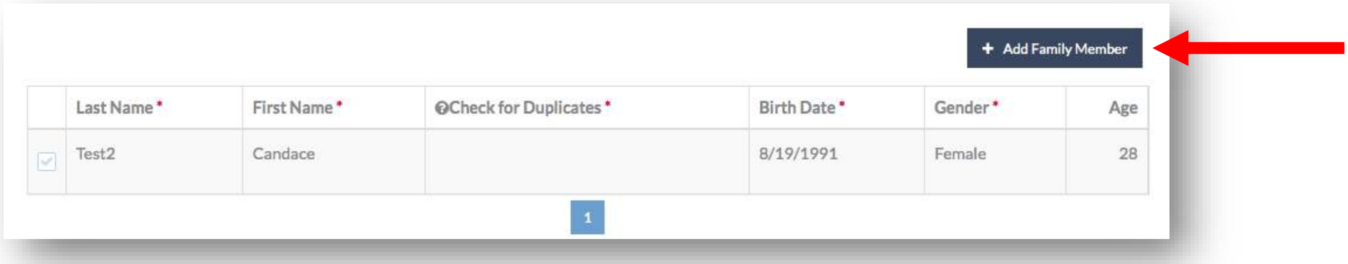
- ***If a client provides an email address, that email address must be completed in both the email address text box and the confirm email address text box.***

- ***After completing all required information on this form, click 'Next' in the lower right hand corner of the screen.***

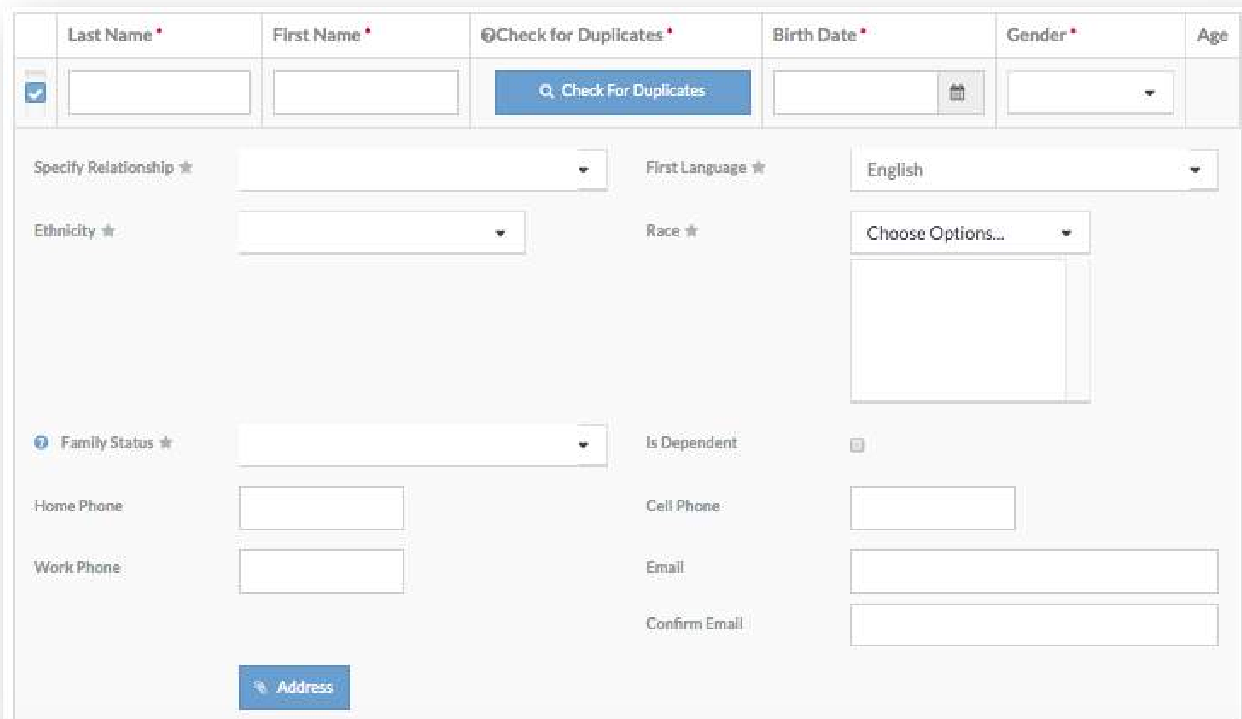
Adding Family Members

	Last Name *	First Name *	Check for Duplicates *	Birth Date *	Gender *	Age
	Test2	Candace		8/19/1991	Female	28

- ***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.***



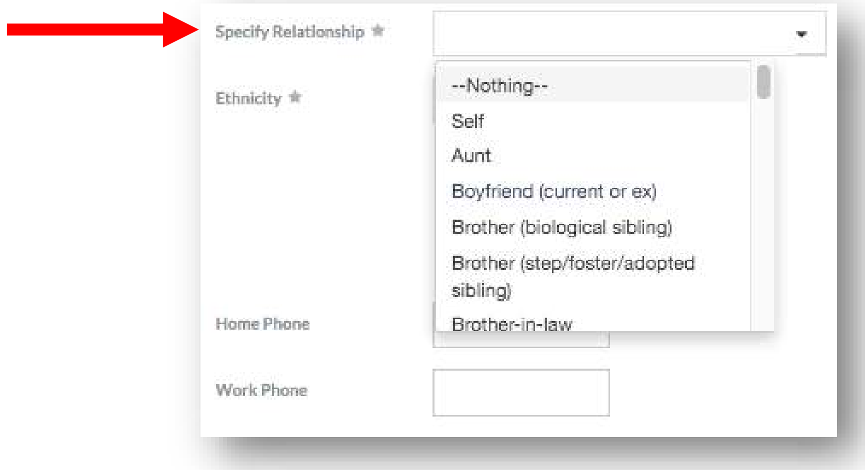
- ***To add additional family members to the client's family, click the 'Add Family Member' button in the upper left-hand corner of the screen. You can add several family members at once. Note that a 'Family' in CaseWorthy groups entities by specifying relationships. You may add individuals to a client's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



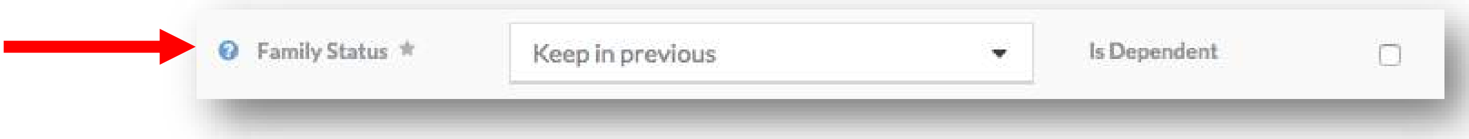
- ***A new row will appear in the table as well as blank fields to be completed for the new family member.***

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

- ***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.***

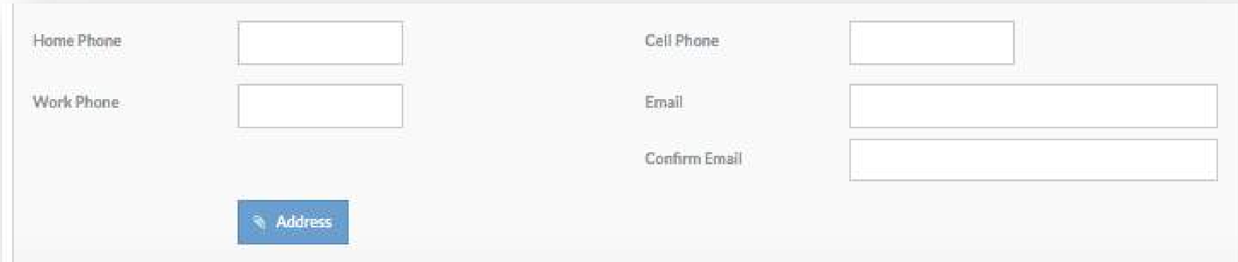


- ***'Specify Relationship' is a field unique to family members. This field indicates how this individual is related to the HOH. To indicate the relationship, click the 'Specify Relationship' drop-down list. Select the option that best describes the Client and Family member's relationship. Options include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

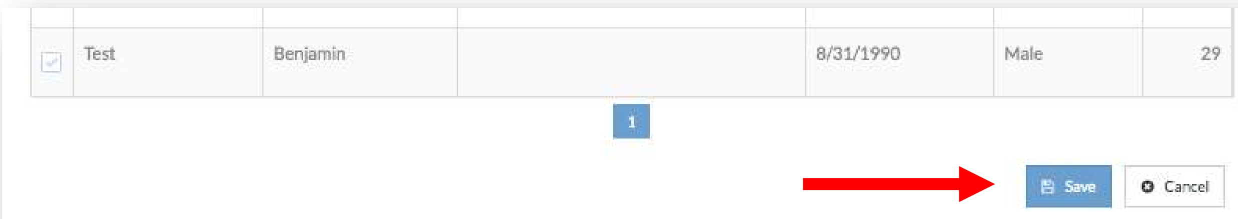


- ***'Family Status' indicates whether the family member should be remain or be removed from a previous family (if applicable). 'Remove from previous' is only an option if the family member is a duplicate client. This will remove the family member from the previous Family ID and add them to the current HoH's Family ID.***

- ***The 'Is Dependent' check box indicates if this family member is a dependent of the HOH.***

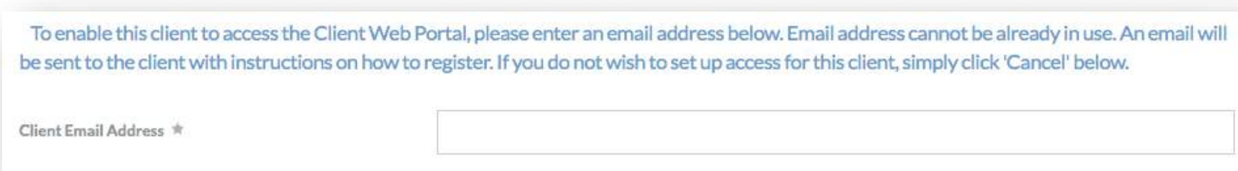


- ***The contact information fields allow you the option of indicating contact information specific to the family member.***



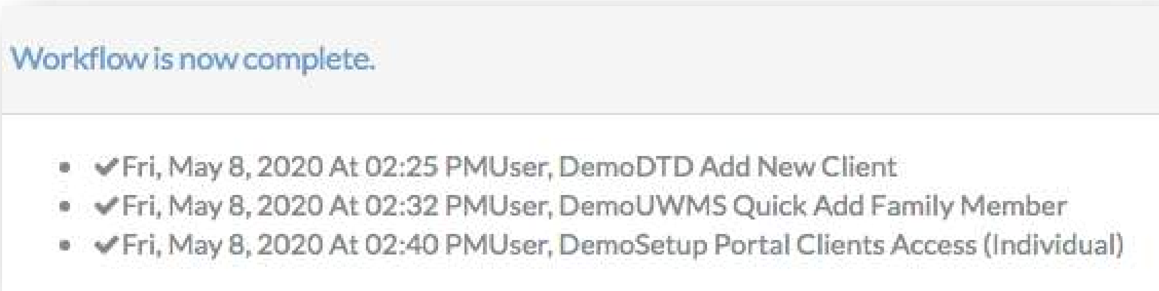
- ***Once all the family members have been created, click save in the lower right hand corner of the screen.***

Client Web Portal



- ***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.***

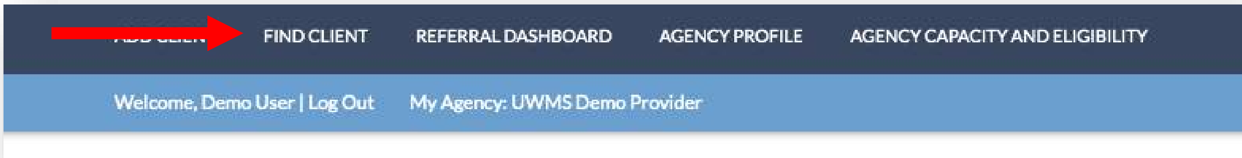
- ***To set up Client access, type in the Client's email address into the text box. The email address must be unique and not used for any other Client in CaseWorthy. Click 'Save' in the lower right hand corner to complete the workflow. If a Client opts out of accessing the portal, click the 'Cancel'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



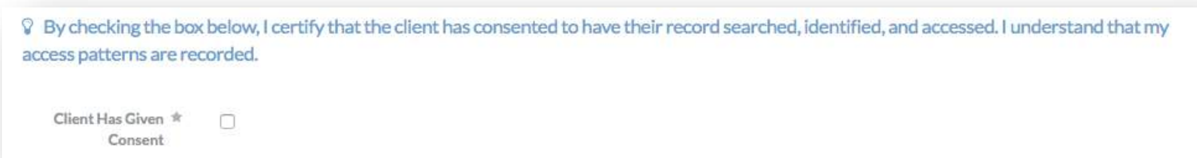
- ***On the next screen, you will see the text 'Workflow is now complete'. You have now completed the Add New Client workflow. Click 'Done' in the lower right hand corner of the screen.***

Client Dashboard

Finding Existing Clients

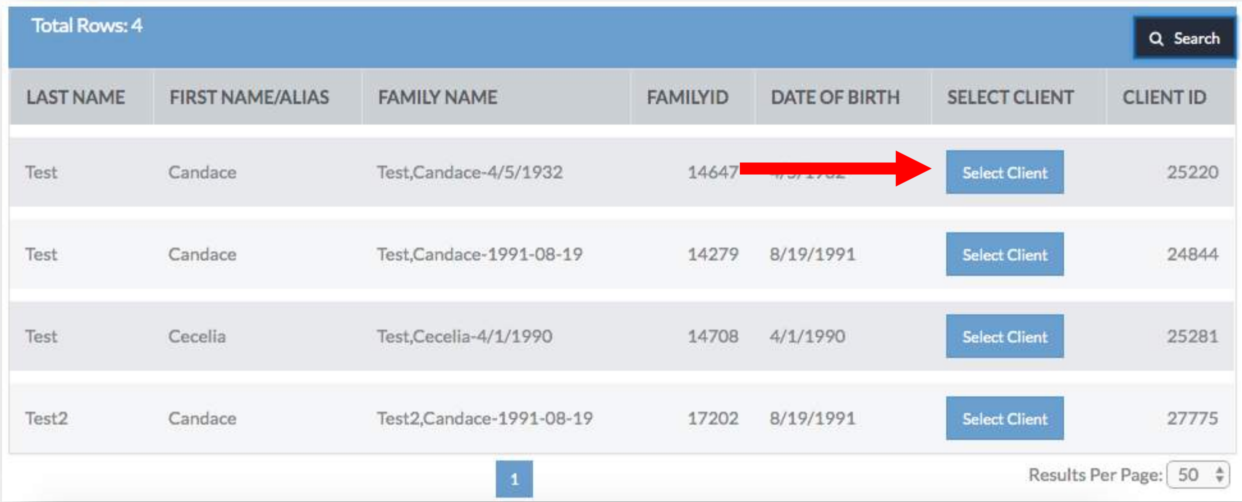


- ***To find an existing client, click the 'Find Client' button located on the top navigational bar.***



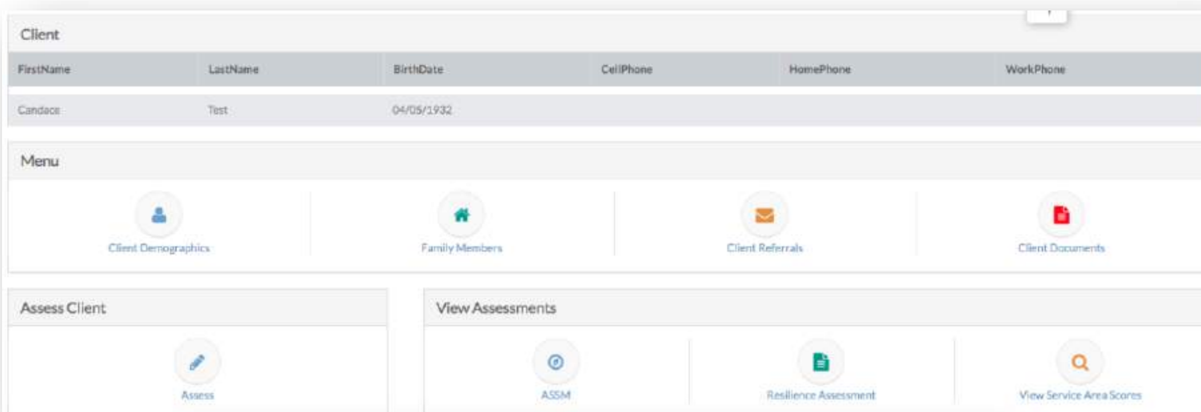
- ***Clients must consent to have their record searched. Verbal consent can be indicated by clicking the checkbox 'Client Has Given Consent'. Note that Driving the Dream administrators can track Client search history by users.***

- ***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.***

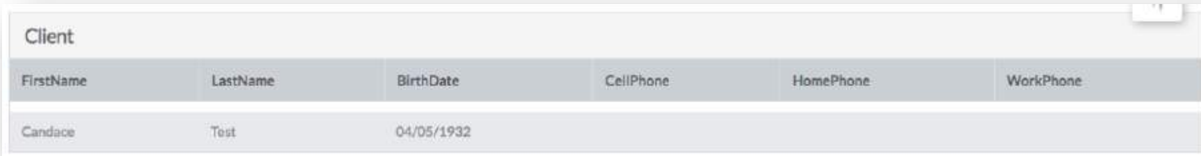


- ***A table will appear with Clients that meet your search criteria. After identifying the correct client, click the 'Select Client' button.***

Navigating the Client Dashboard

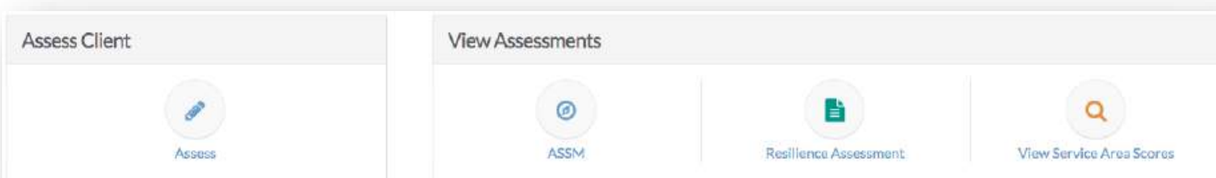


- ***The Client Dashboard allows you to interact with all demographic information regarding a Client as well as their referral and assessment history. You must navigate to the Client Dashboard to make a new referral for a Client.***



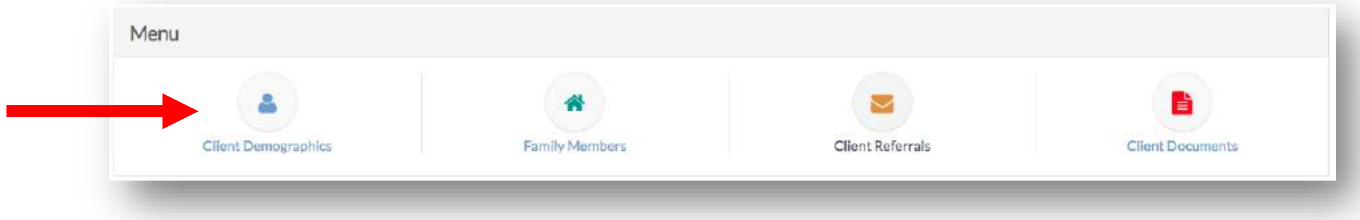
- ***At the top of the Client Dashboard is a table containing the Client's first name, last name, birth date, and phone numbers (if supplied).***

- ***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.***

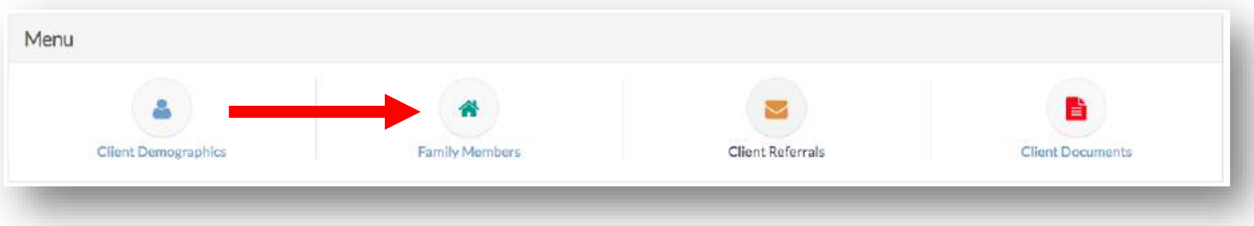


- ***At the bottom of the Client Dashboard is the assessment section. The assessment section has links to complete an optional assessment for a Client or view previously completed Client assessments.***

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 of contact information, can be made here.*



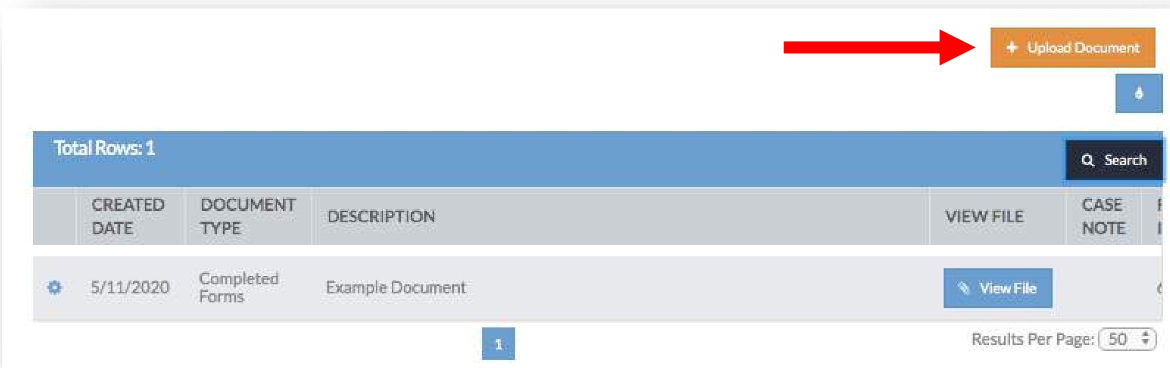
- *To view and/or add additional family members, select the 'Family Members' button in the menu section of the Client Dashboard. This will take you to the Family Member table where you can view any existing family members. To add addition family members, click the 'Add Family Member' button in the upper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

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

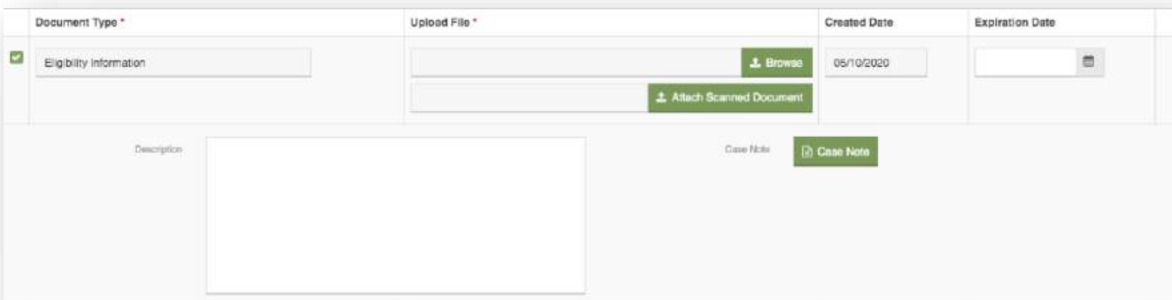
- ***To edit or delete an existing document, click the gear on the left-hand column of the table. Select the appropriate option for the document.***

- ***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.***

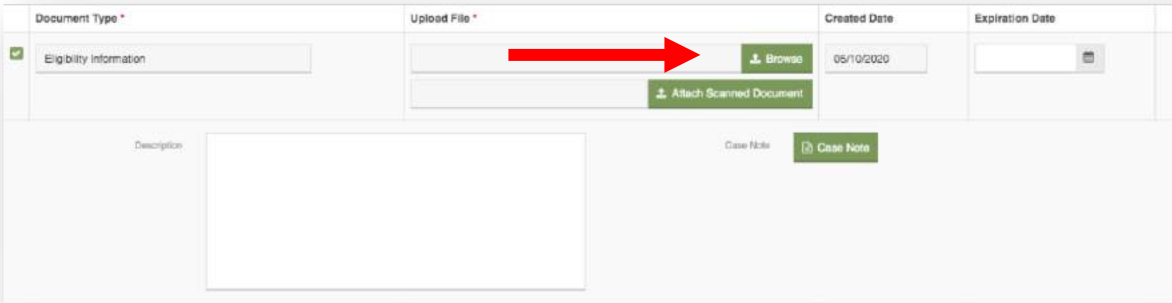


- ***To upload a new document to a Client's profile, select the 'Upload Document' button the upper right hand corner of the screen.***

- ***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.***

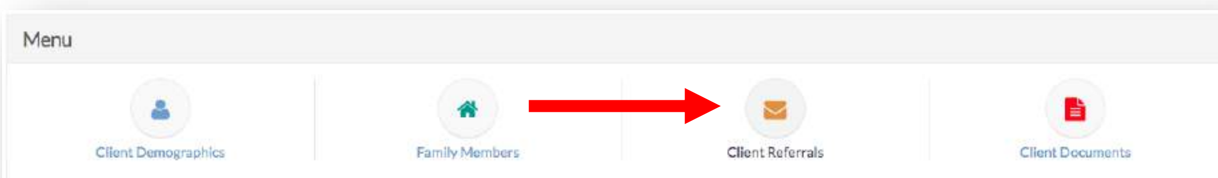


- ***New fields will appear that will allow you to browse and upload a document from your computer, add a description, include a case note, and indicate an optional expiration date.***

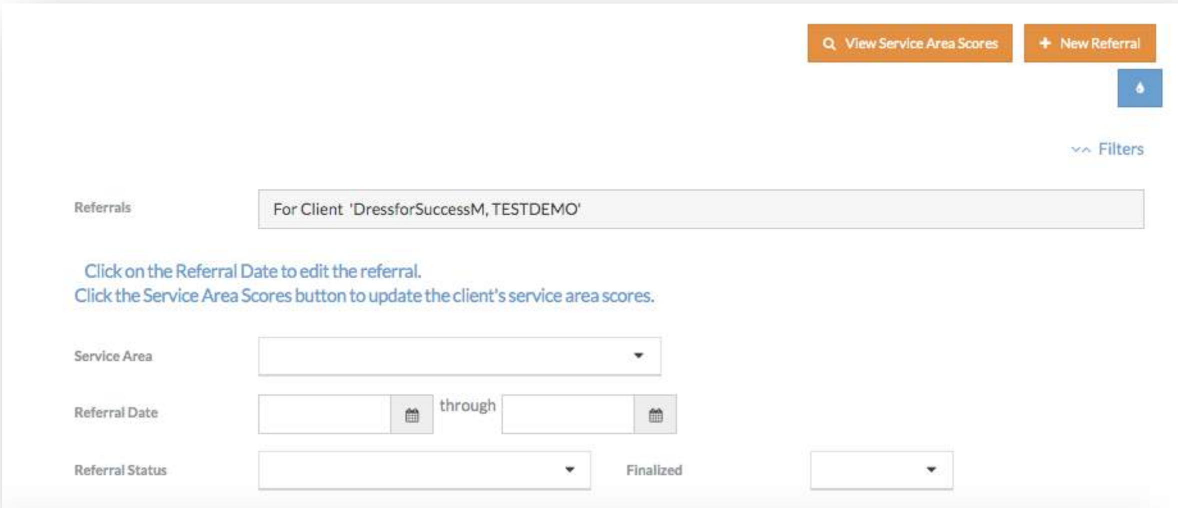


- ***To upload a document from your computer, select the 'Browse' button. A new computer window will appear where you can select the document. Once selected, the document's name will appear to the left of the 'Browse' button. Click the 'Save' button in the lower left hand corner of the screen to save the document and close the window.***

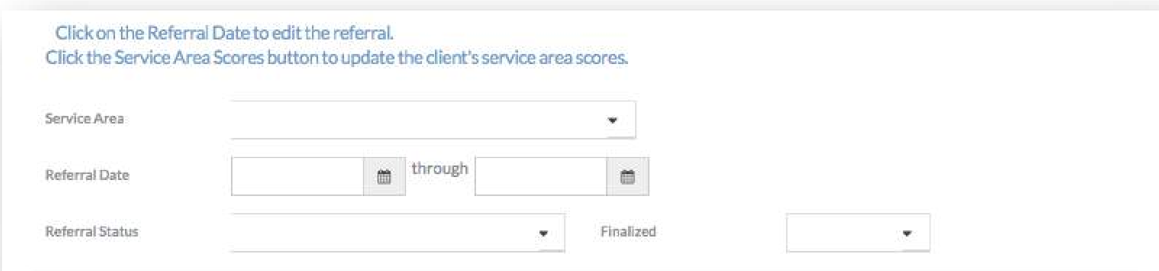
Client Referrals



- ***To view past referrals for the selected Client or to create a referral for a Client, select the 'Client Referrals' button.***

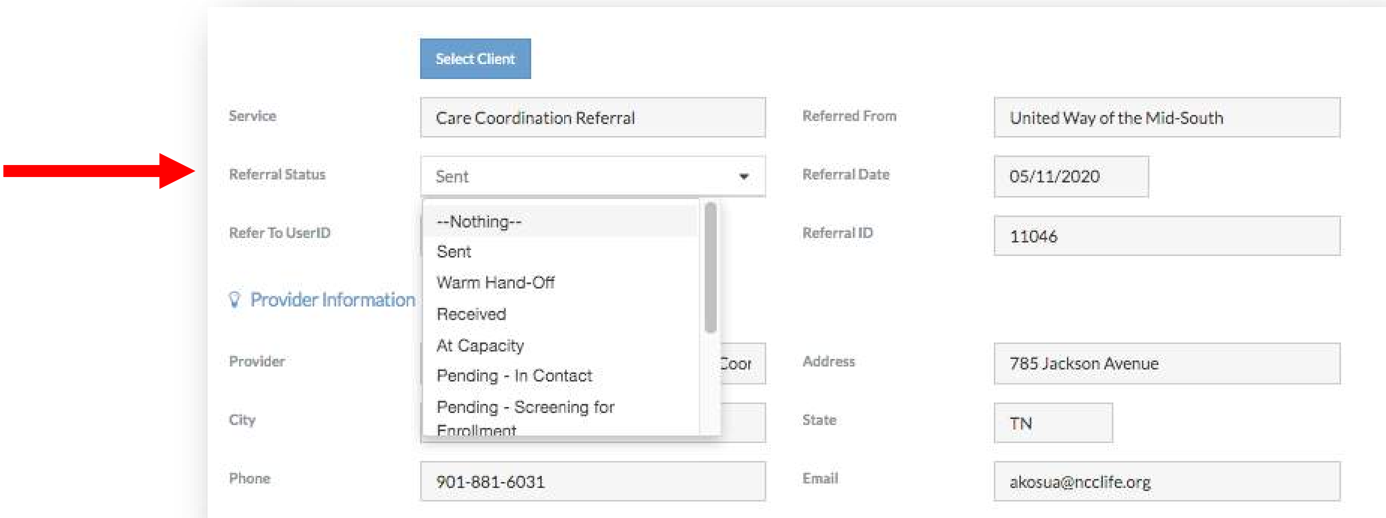


- ***On the Client Referrals page, you can search for past client referrals, view past service area scores, or add a new referral.***

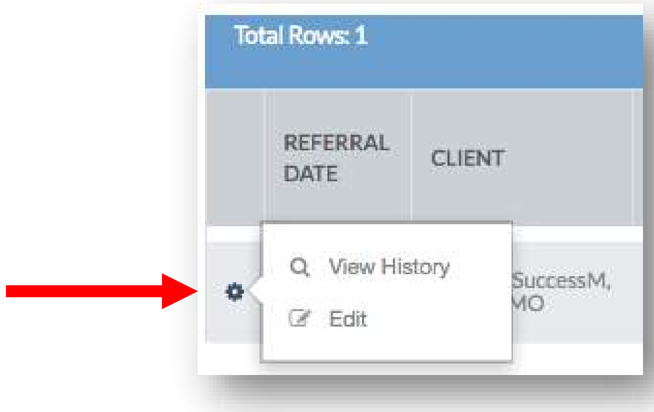


- ***To search for past Client referrals, use the filter fields located above the 'Search' button. You can filter referrals by service area, a referral date range, referral status, and/or whether the referral is at a finalized status. After including as many filter parameters as desired, select 'Search'.***

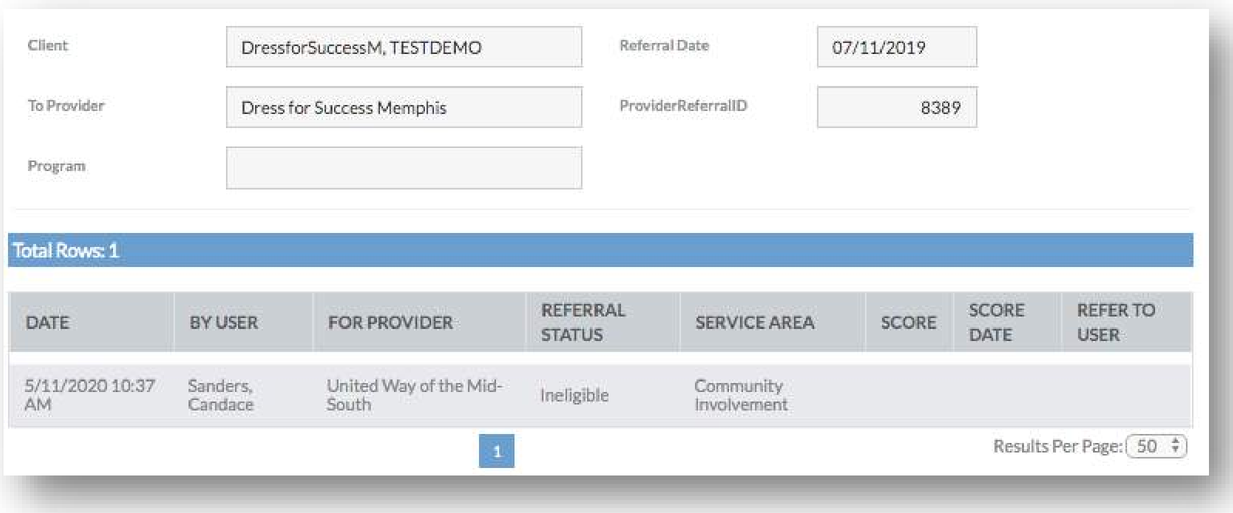
- ***Any past referrals will appear in a table below the 'Search' button. To view the referral form and make any changes to the referral status, click the entry in the referral date column.***



- ***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'.***

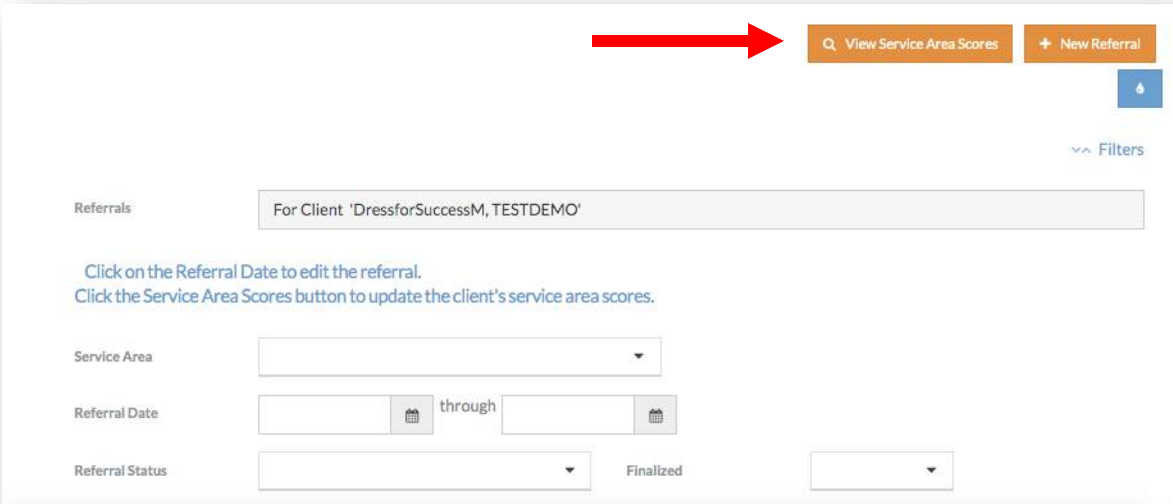


- ***To view the history of a referral, click the gear on the left hand side of the table. Select 'View History'.***

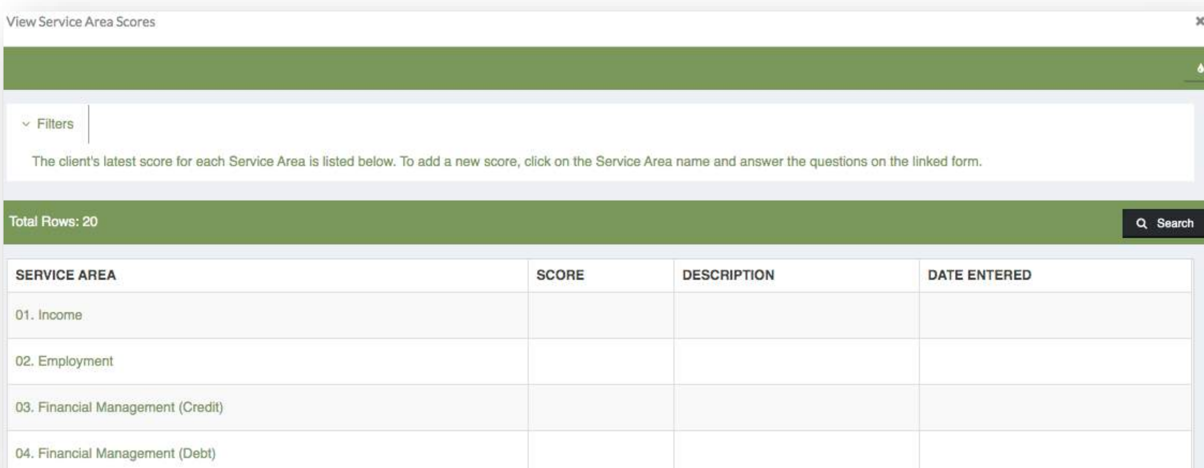


- ***The referral history page generates a table of all referral updates for a client, including the date of the update and the user who made the change.***

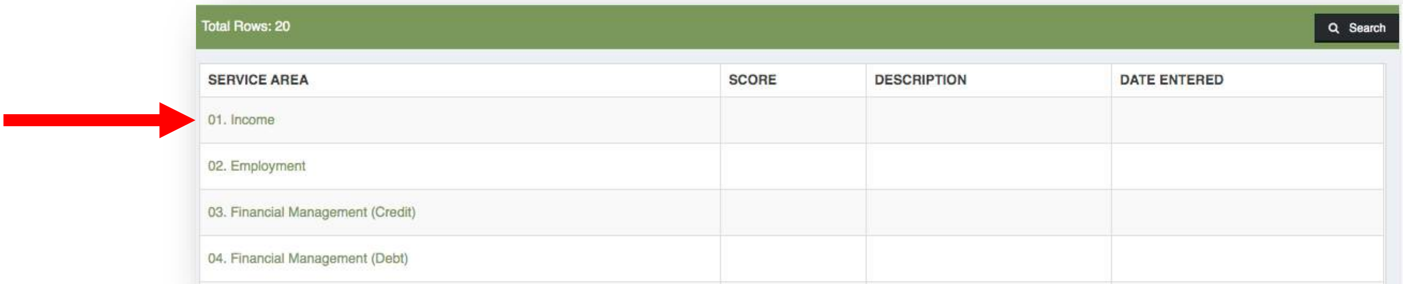
View Client Service Area Scores



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

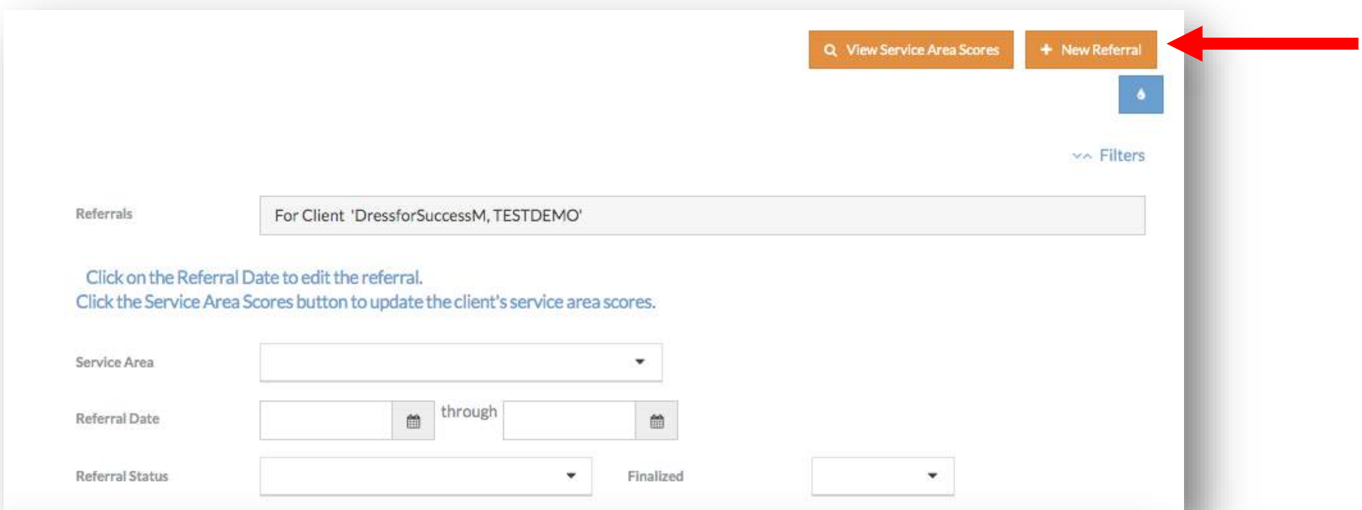


- ***A new window will appear with a table containing each service area and any available score for that service area. Service areas correspond with the 20 domains of the Arizona Self-Sufficiency Matrix (ASSM).***

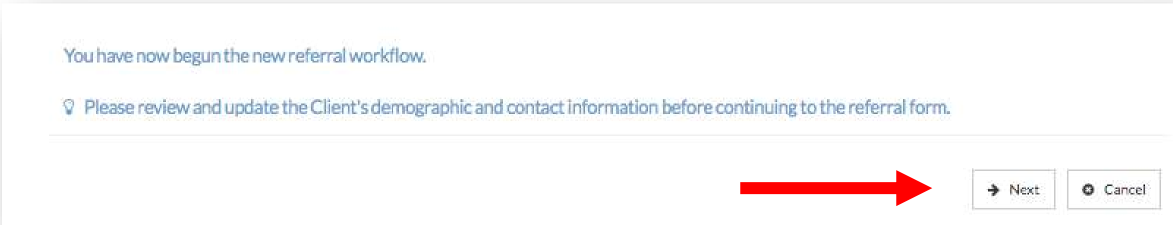


- ***To view past completed service area questions, select the appropriate service area. A new window will appear where you can view the questions and previous answers. You cannot make changes to past service area scores. For more information about Service Area Scores, see 'Add a New Client Referral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

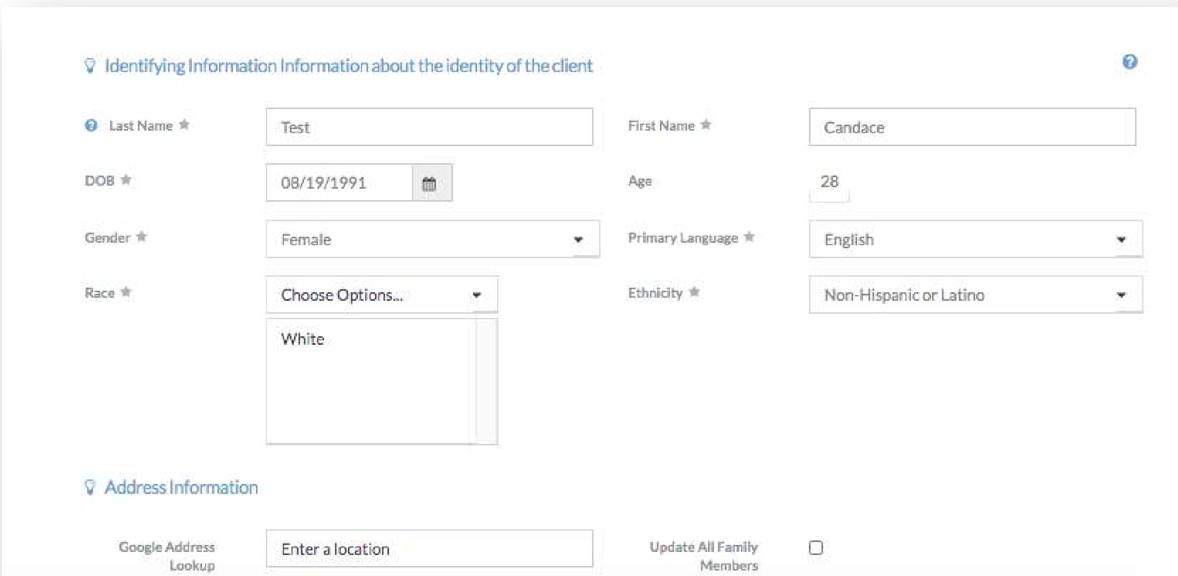
Add a New Client Referral – Existing DTD Agencies



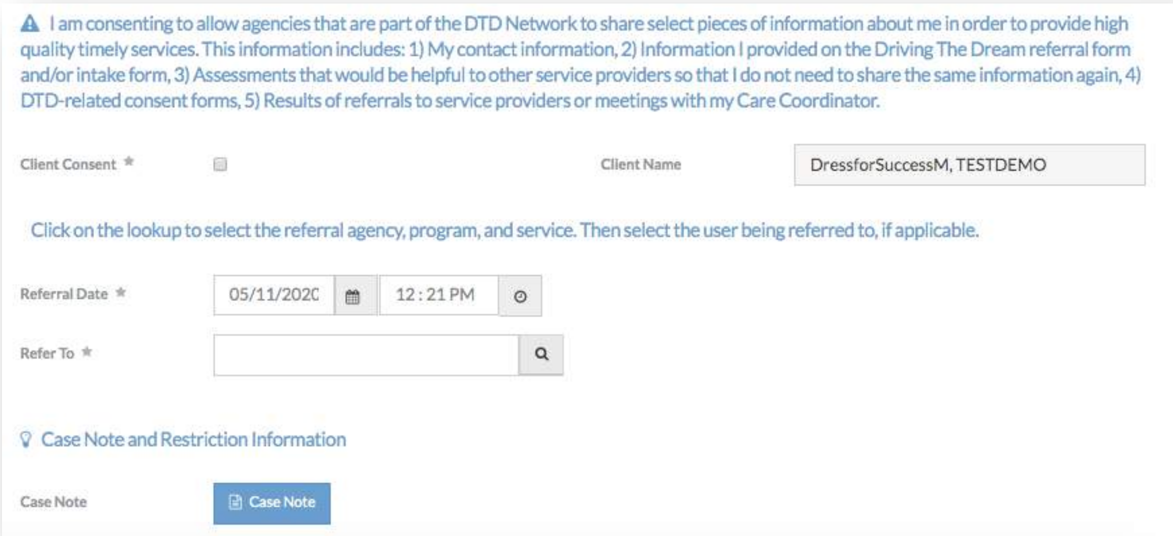
- ***To add a new Client referral to an existing DTD Agency, select the 'New Referral' button in the upper right hand corner of the screen. You will now begin the Add New Client Referral workflow.***



- ***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.***



- ***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 DressforSuccessM, TESTDEMO

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

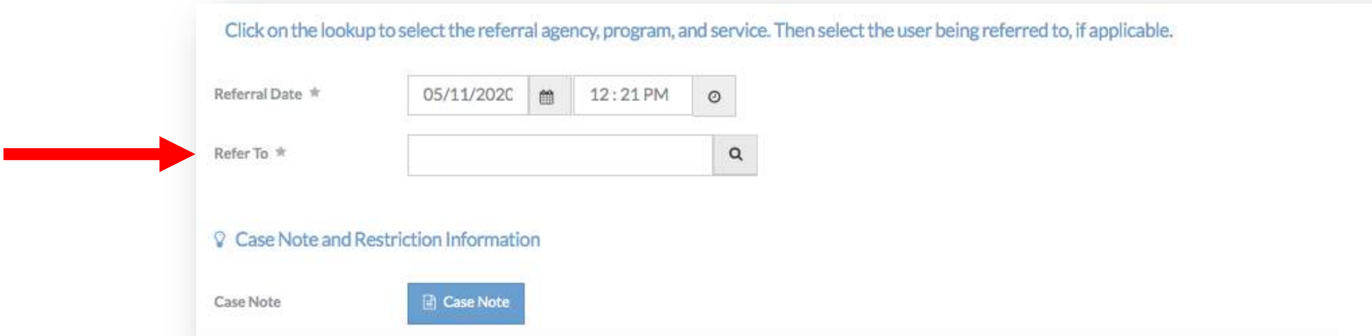
Case Note Case Note

- ***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.***

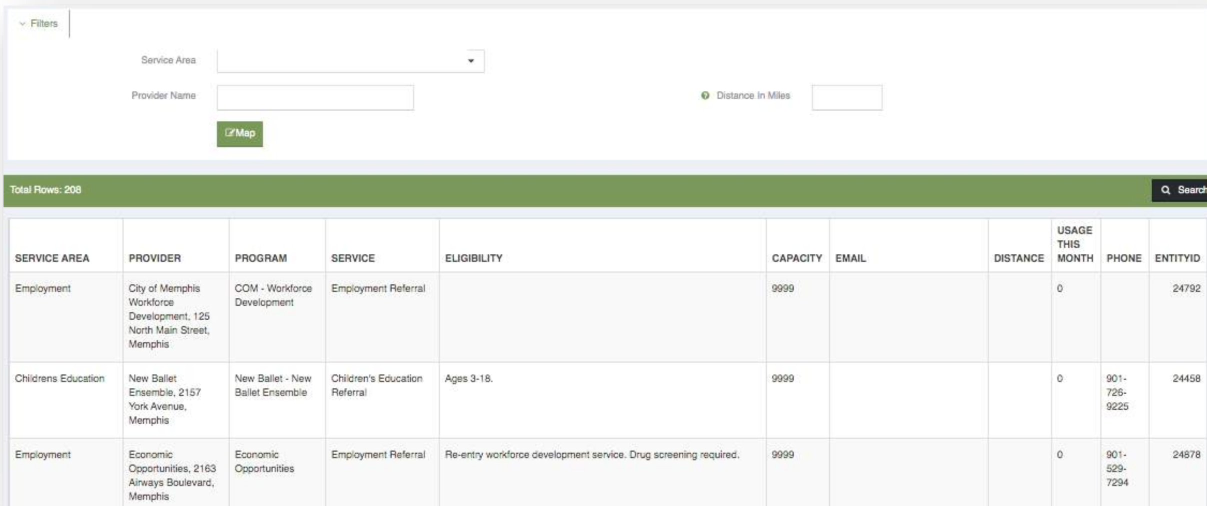
I am consenting to allow agencies that are part of the DTD Network to share select pieces of information about me in order to provide high quality timely services. This information includes: 1) My contact information, 2) Information I provided on the Driving The Dream referral form and/or intake form, 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 DressforSuccessM, TESTDEMO

- ***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.***

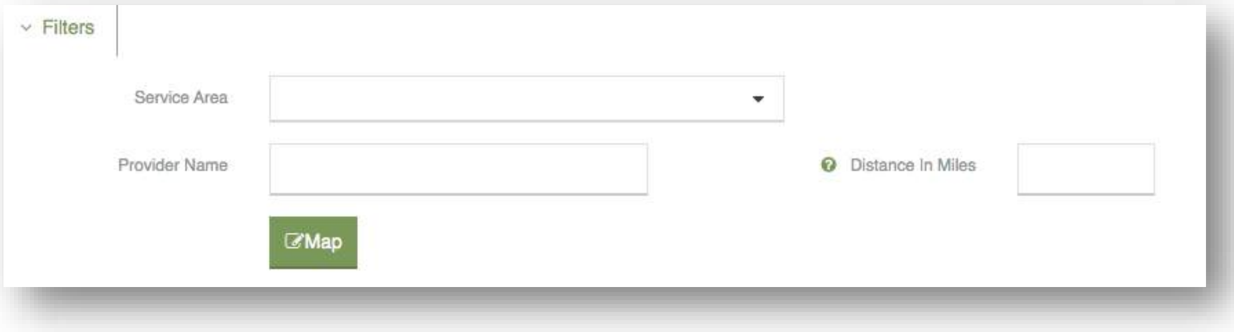


- ***To identify a provider to refer a client to, select the 'Refer To' search lookup.***

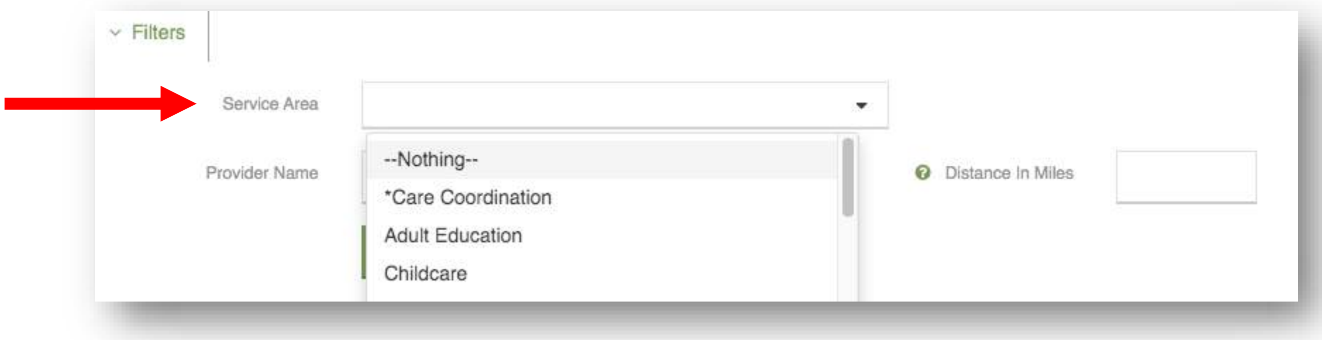


SERVICE AREA	PROVIDER	PROGRAM	SERVICE	ELIGIBILITY	CAPACITY	EMAIL	DISTANCE	USAGE THIS MONTH	PHONE	ENTITYID
Employment	City of Memphis Workforce Development, 125 North Main Street, Memphis	COM - Workforce Development	Employment Referral		9999			0		24792
Childrens Education	New Ballet Ensemble, 2157 York Avenue, Memphis	New Ballet - New Ballet Ensemble	Children's Education Referral	Ages 3-18.	9999			0	901-726-9225	24458
Employment	Economic Opportunities, 2163 Airways Boulevard, Memphis	Economic Opportunities	Employment Referral	Re-entry workforce development service. Drug screening required.	9999			0	901-529-7294	24878

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

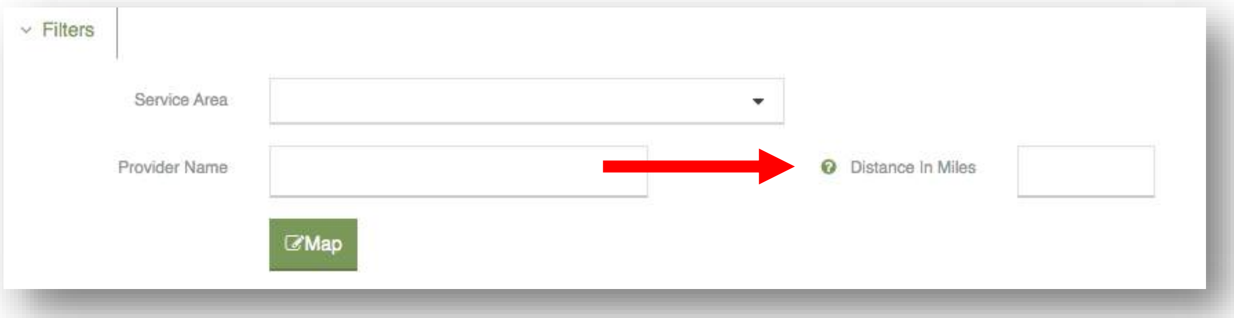


- ***The table of providers can be filtered by using the fields above the 'Search' button. The table of providers can be searched by service area, name, or distance from the Client's address.***

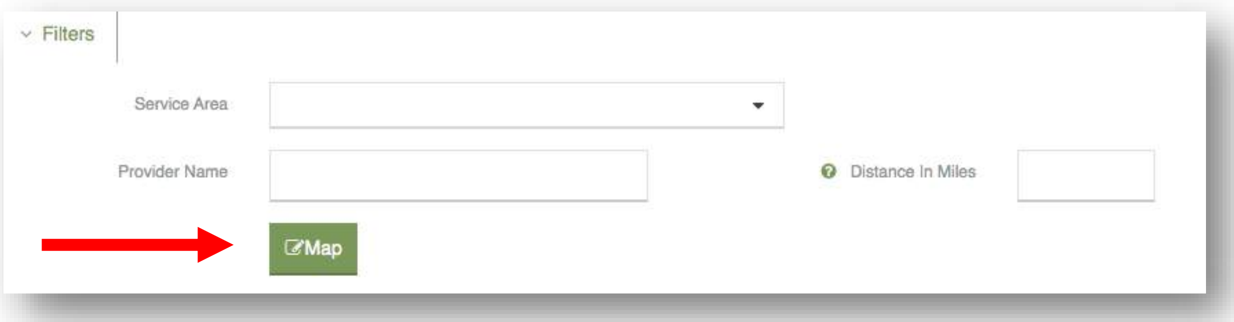


- ***To search by service area, select the 'Service Area' drop down list. Service area options include the 20 domains of the Arizona Self Sufficiency Matrix as well as Care Coordination.***

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



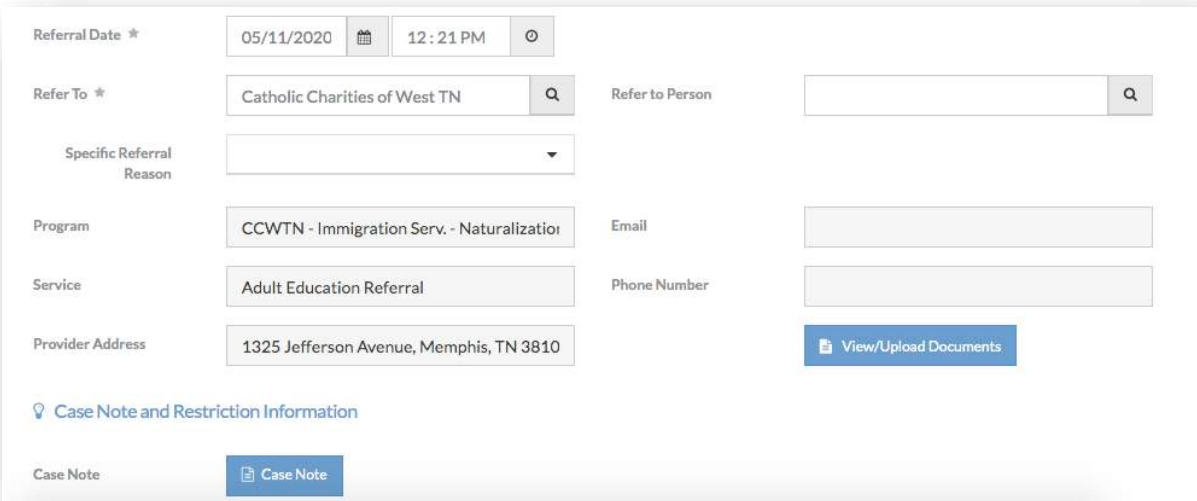
- ***To search by distance from the Client's address, type a number in the 'Distance in Miles' text box.***



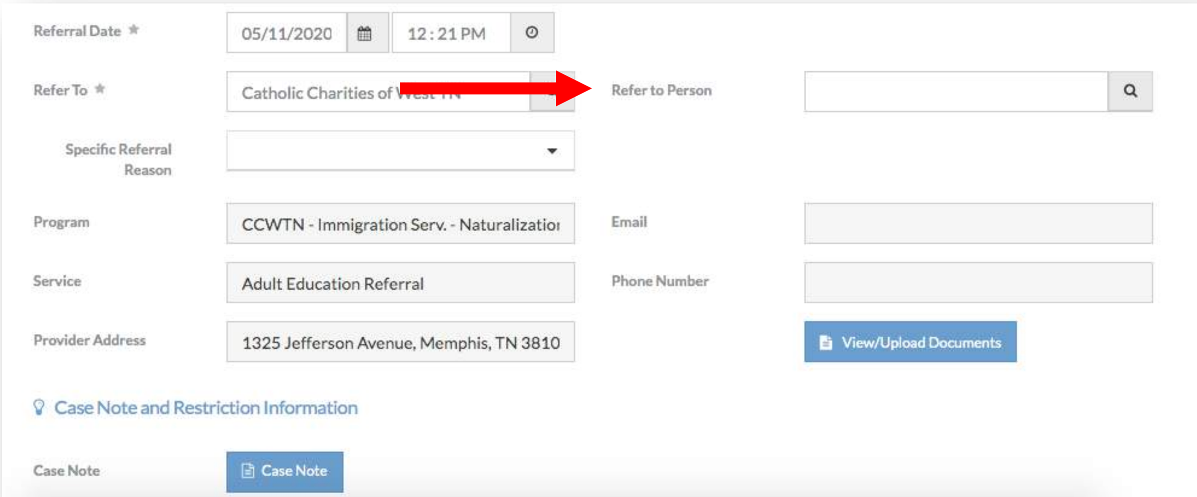
- ***To view a map of all Providers, select the 'Map' button. A new window will appear with a map of all Provider locations.***

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	901-726-9225	24458
Employment	Economic Opportunities, 2163 Airways Boulevard, Memphis	Economic Opportunities	Employment Referral	Re-entry workforce development service. Drug screening required.	9999			0	901-529-7294	24878

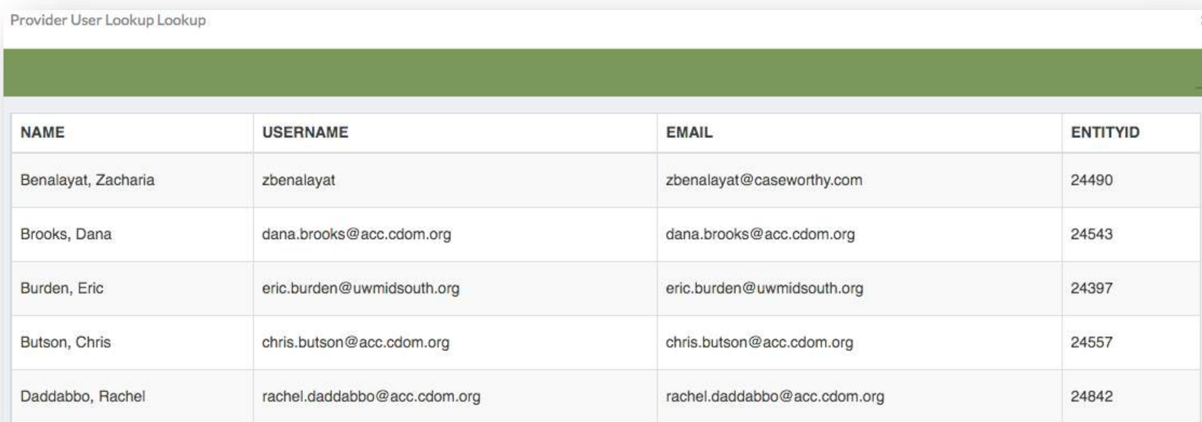
- ***The Provider table contains the Provider's service area, name, program, any eligibility information, capacity, distance from the Client, usage this month, phone number, and entity ID. To select a provider, click anywhere in the row that contains the provider's information.***



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

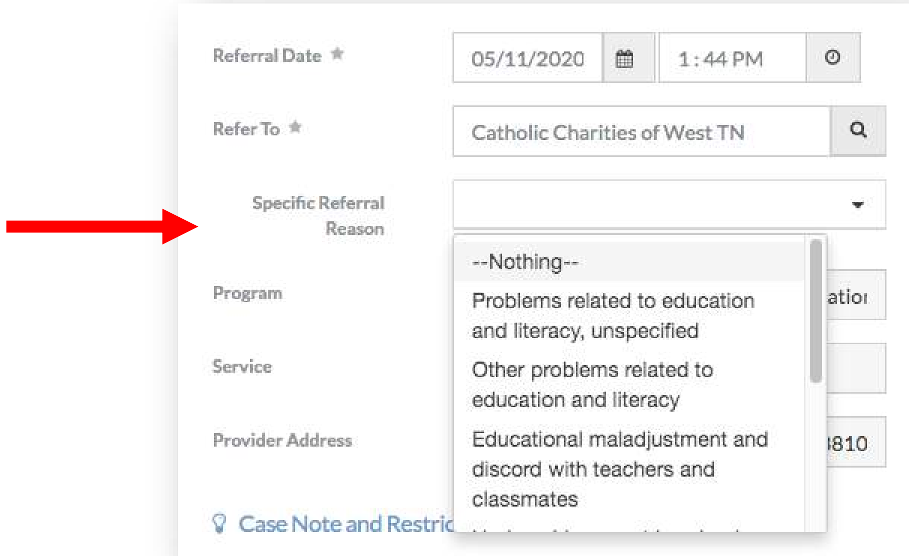


- ***Optionally, you can indicate a specific person to receive a referral. All users from a Provider will have access to any referrals sent to that Provider. By indicating a specific person, you can direct that referral to an individual that would best serve that particular Client. To select a specific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

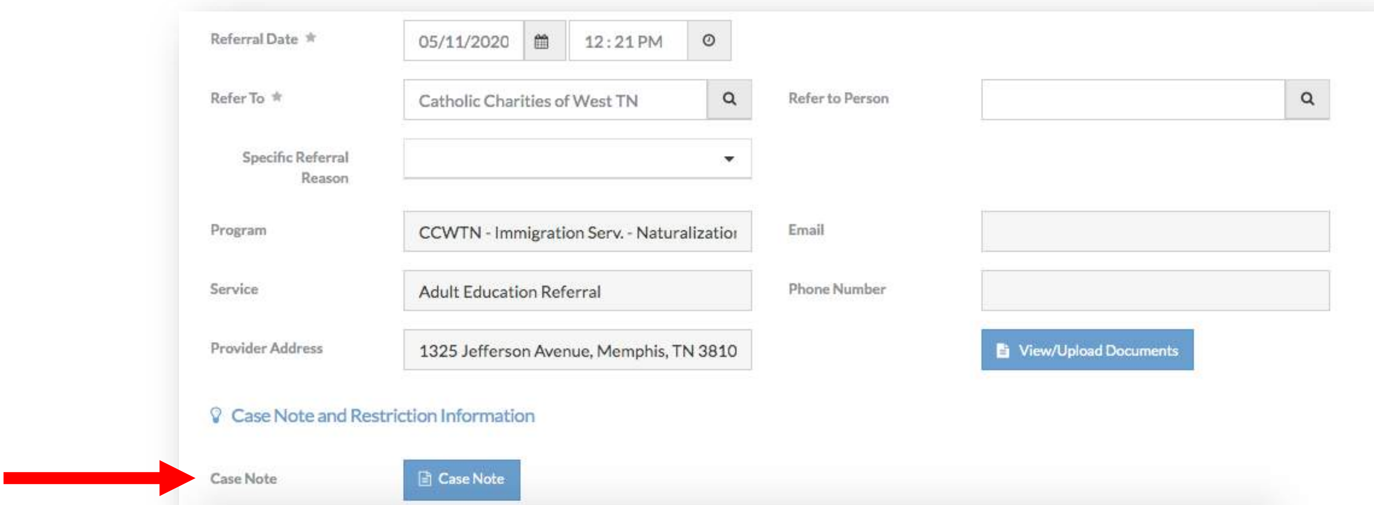

Provider User Lookup Lookup

NAME	USERNAME	EMAIL	ENTITYID
Benalayat, Zacharia	zbenalayat	zbenalayat@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

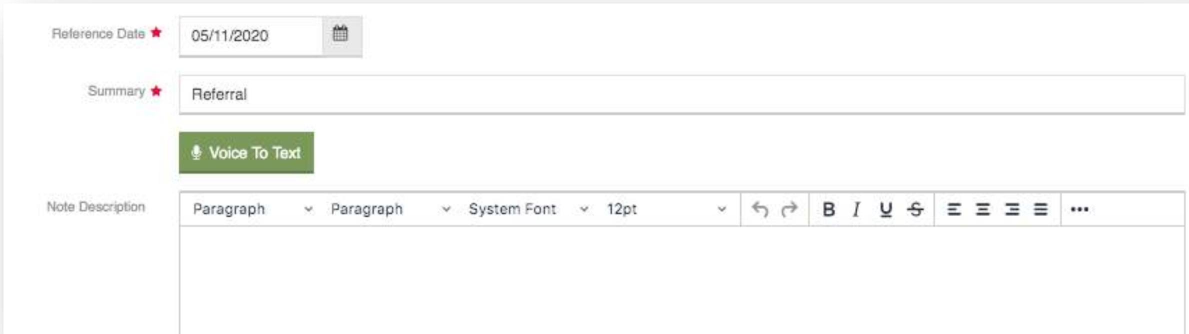
- ***A new window will appear with a table of Users for the Provider. Select the appropriate User by clicking anywhere on that User's row. The window will close and that User will now appear in the 'Refer to Person' textbox.***



- ***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.***

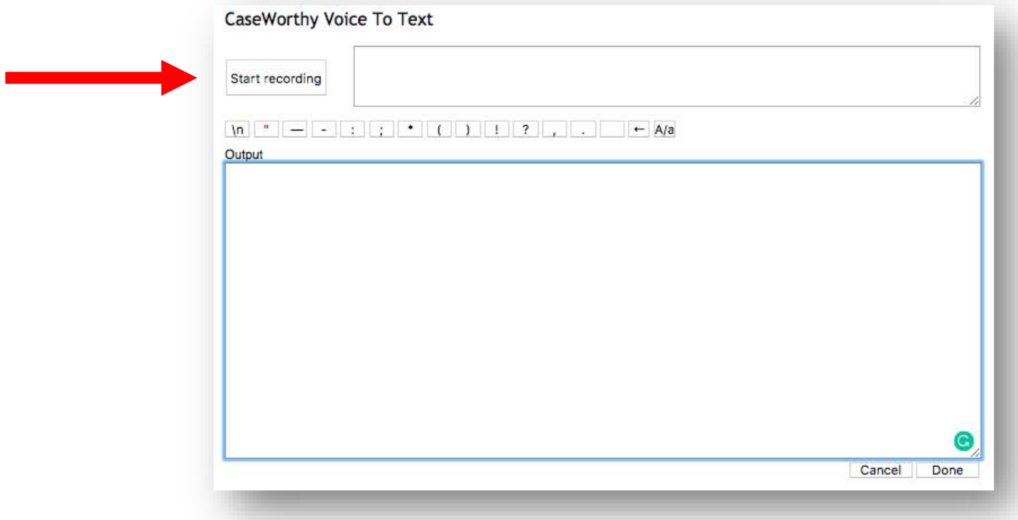


- ***Optionally, you may attach a Case Note with additional details about the referral. To attach a Case Note, select the 'Case Note' button at the bottom of the form.***

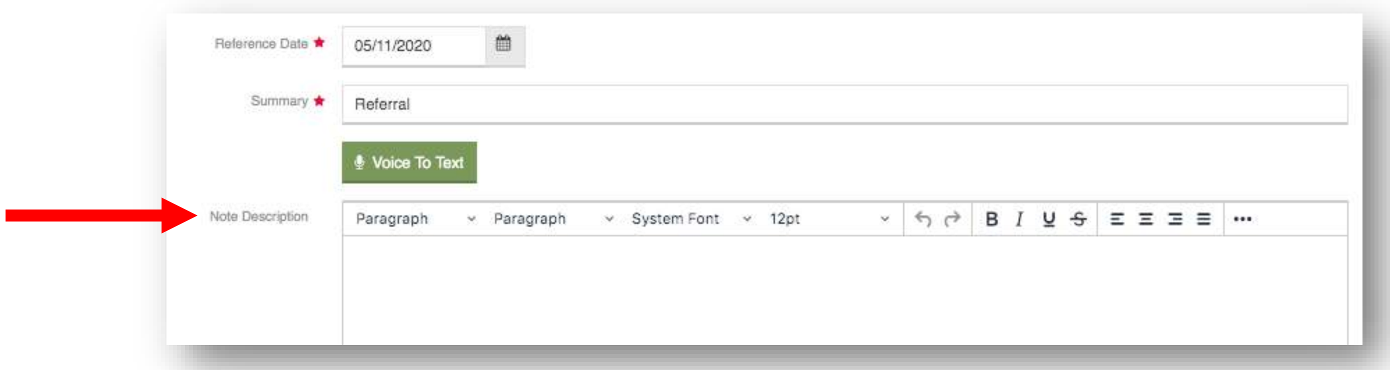


- ***A new window will appear. The reference date will default to today's date the summary will be pre-populated with 'Referral'.***

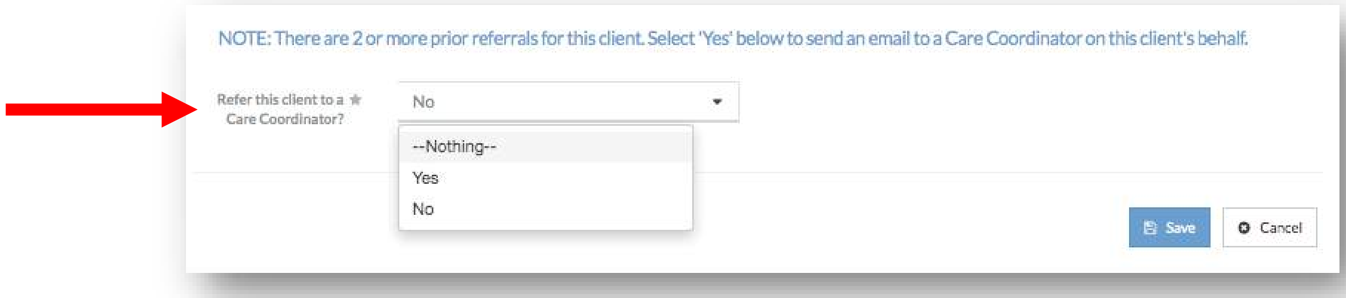
- ***To transcribe your note by voice to text, select the 'Voice To Text' button. Note that voice to text is only available in the Chrome web browser.***



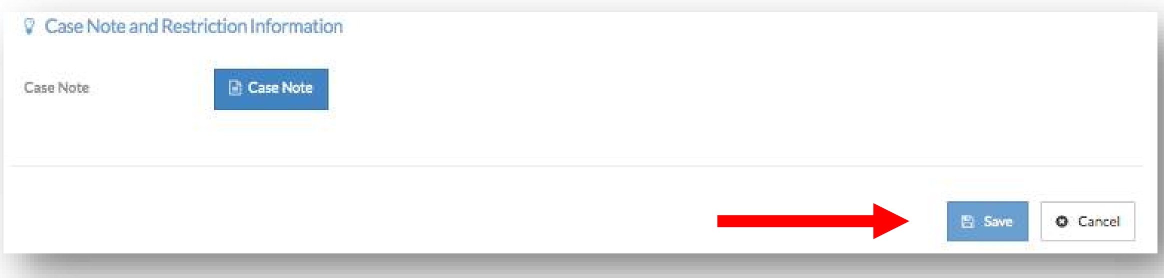
- ***A new window will appear. To begin transcription, select the 'Start recording' button and begin speaking. Your words will be transcribed and appear as text on the screen. Note that you must name punctuation while speaking for it to be transcribed. Once finished, select 'Done'. The window will close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



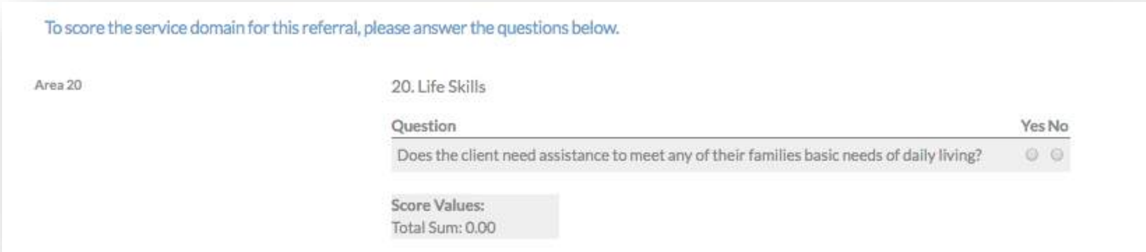
- ***To type your case note, use the 'Note Description' text box to write the case note. This text box is a rich text editor, allowing you to format the description similar to a word processor.***
- ***Once your case note is complete, click 'Save' in the lower right-hand corner. The case note window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



- ***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.***



- ***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?		

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.***

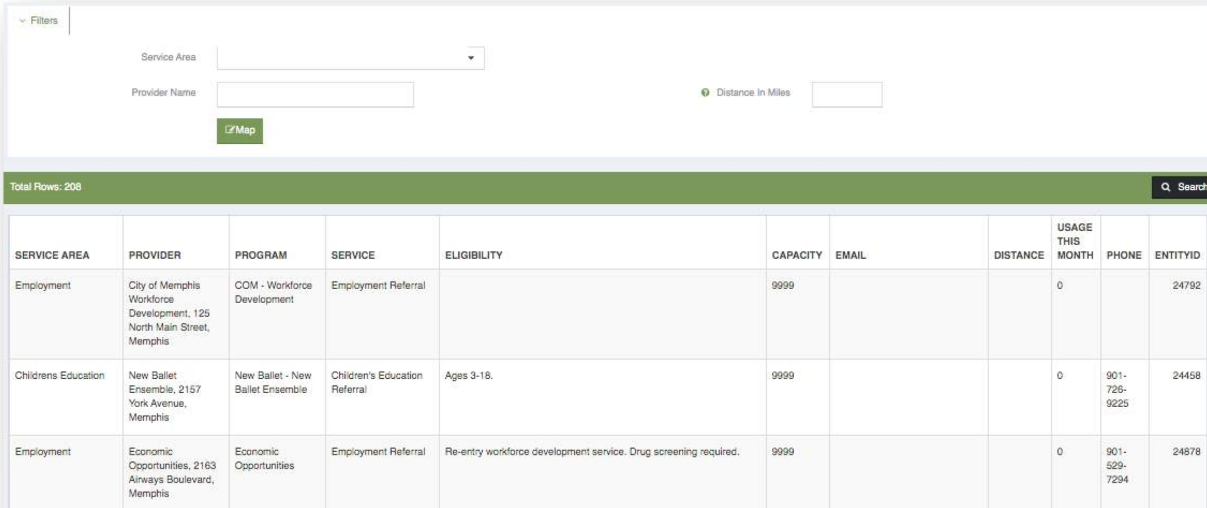
- ***If you are referring the Client to Care Coordination, you will not see any assessment questions. Select 'Save' in the lower right hand corner of the blank form.***

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



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	901-726-9225	24458
Employment	Economic Opportunities, 2163 Airways Boulevard, Memphis	Economic Opportunities	Employment Referral	Re-entry workforce development service. Drug screening required.	9999			0	901-529-7294	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.***

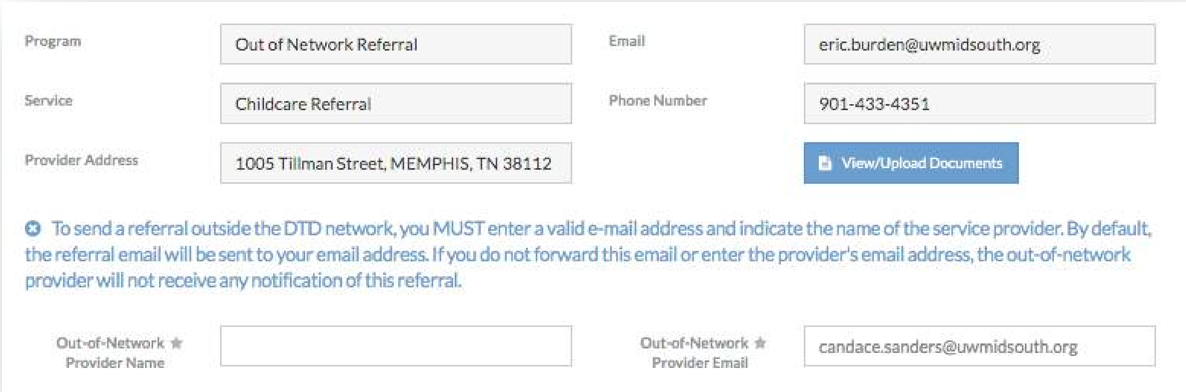
- ***Type 'Out of Network' in the 'Provider Name' text box above the table of referral agencies. Select 'Search'.***

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

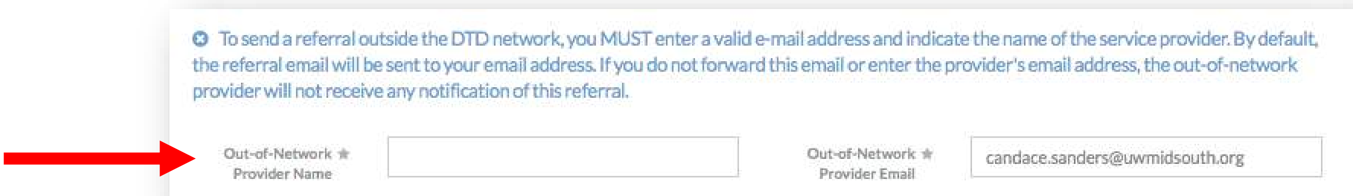
- ***The provider table will filter to only 'Out of Network' providers. There is one out-of-network provider for each service area.***

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

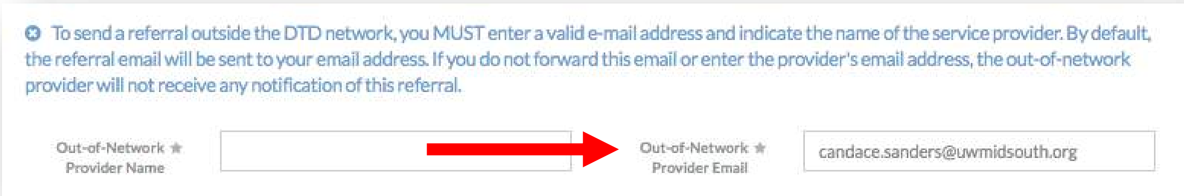
- ***Select the out-of-network provider with the service area most appropriate for the out-of-network referral. The window will close and you will be taken back to the referral form.***



- ***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.***

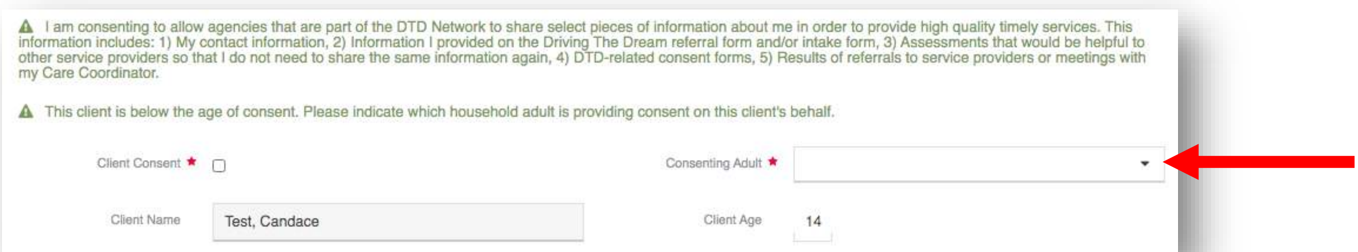


- ***The 'Out-of-Network Provider Name' is the provider outside of the DTD network who will received this referral. Type the provider name into the 'Out-of-Network Provider Name' text box.***



- ***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.***

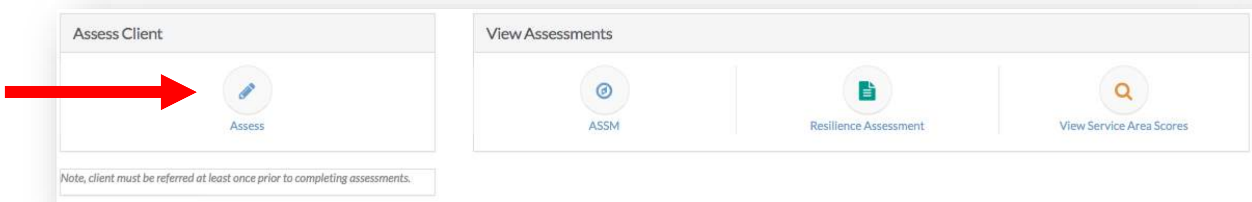
Add a New Client Referral – Referral for a Minor



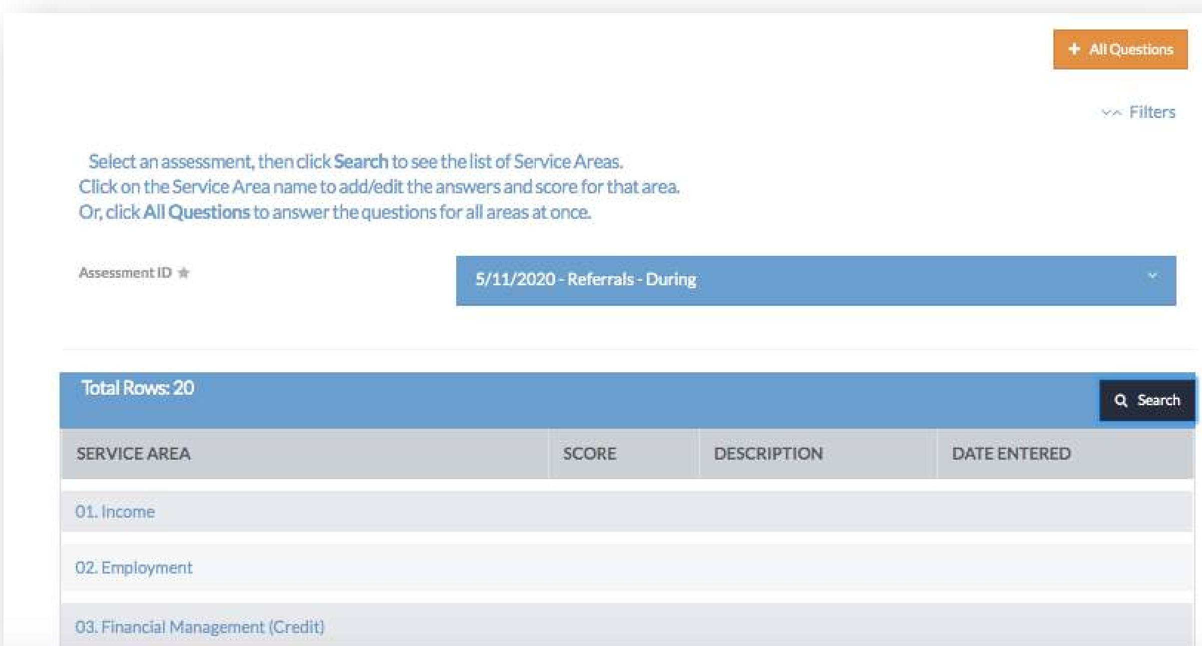
- ***To create a referral for a Client that is a minor, complete the steps for 'Add a New Client Referral – Existing DTD Agencies' up until the point of the referral form. If the client is under the age of 16, referral consent must be completed on behalf of the client by an Adult.***

- ***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.***

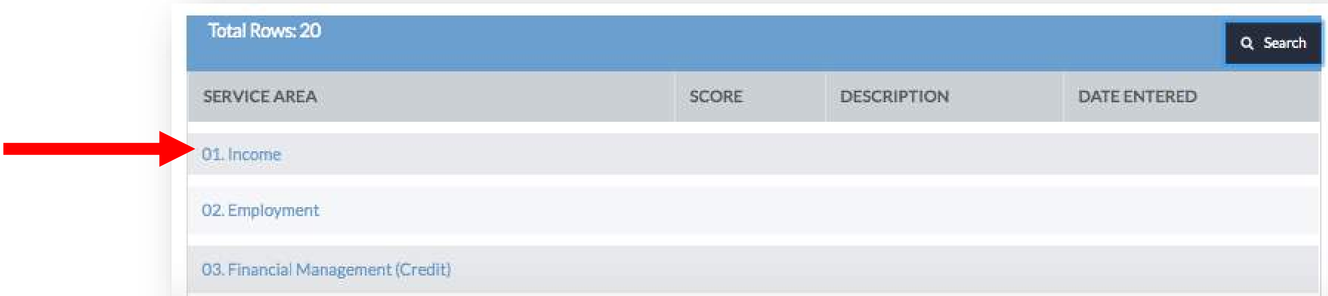
Assess a Client



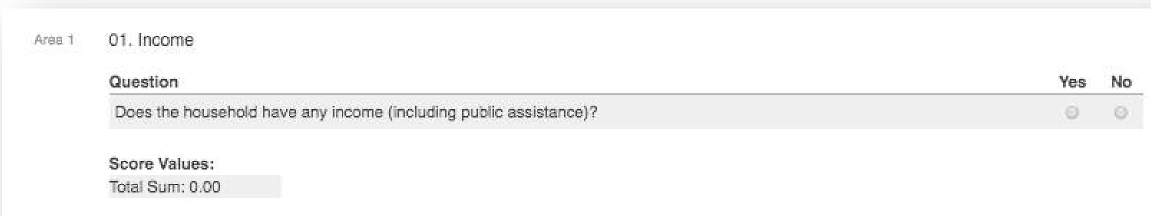
- ***To add a new optional assessment, select the 'Assess' button under 'Assess Client' on the Client Dashboard. A client must have received at least one referral at any status before you can complete an assessment. You will begin the Assessment workflow.***



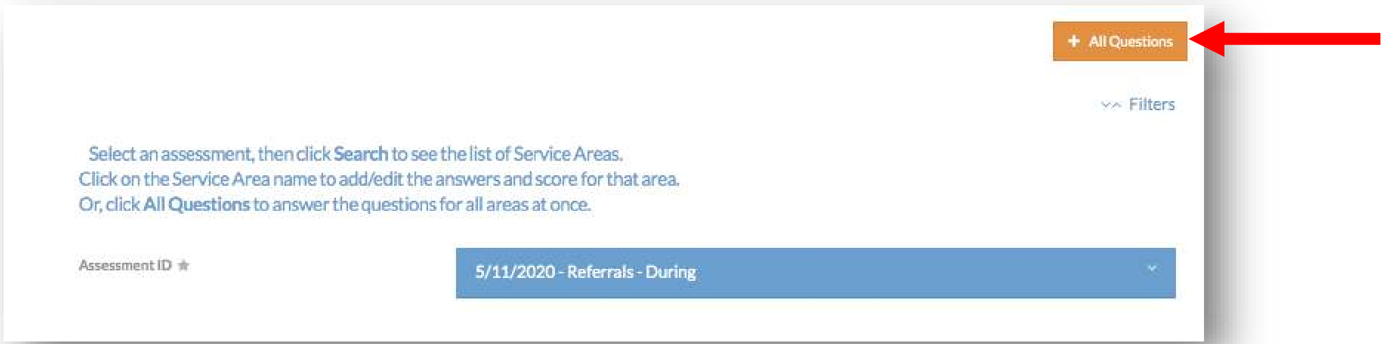
- ***On the first form in the assessment workflow, you can completed the full ASSM assessment or you can assess a client for specific service areas.***



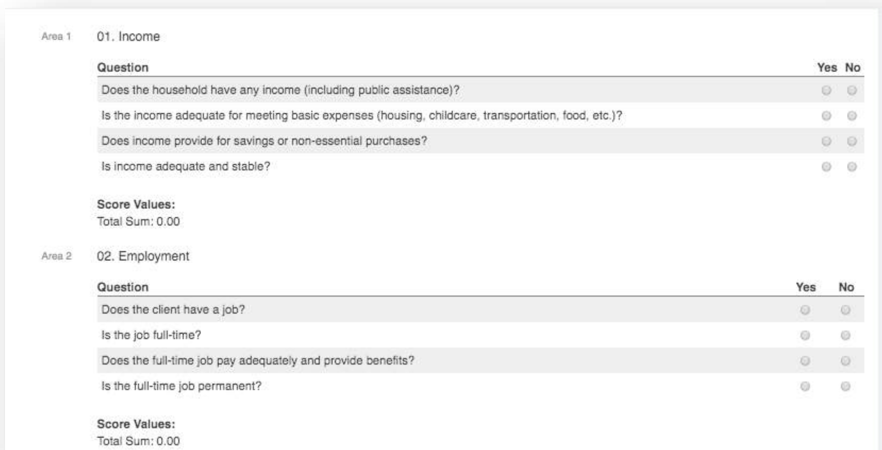
- ***To complete only a specific section of the ASSM, click the service area name on the right column of the table.***



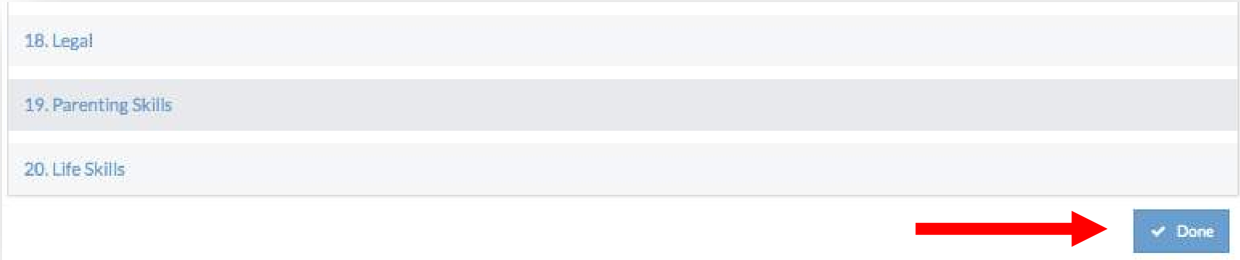
- ***A new window will appear with ASSM questions for that particular service area. Depending on how a Client answers, more questions may appear. You must complete all questions that appear. After completing all questions, click 'Save' at the bottom right hand corner of the assessment. The window will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



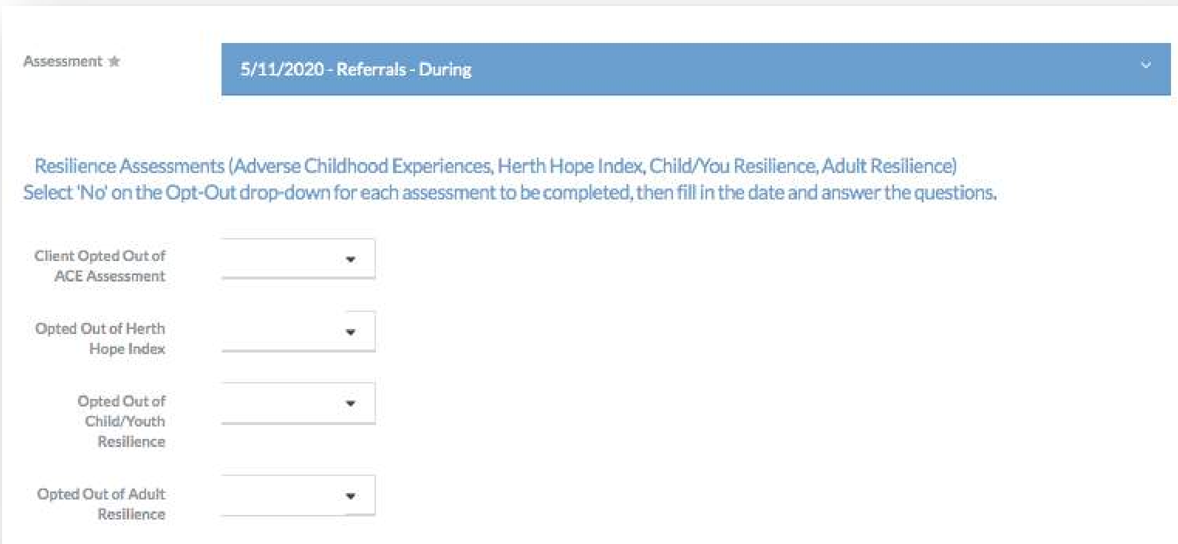
- ***To complete the full ASSM assessment, select the 'All Questions' button in the upper right hand corner of the form.***



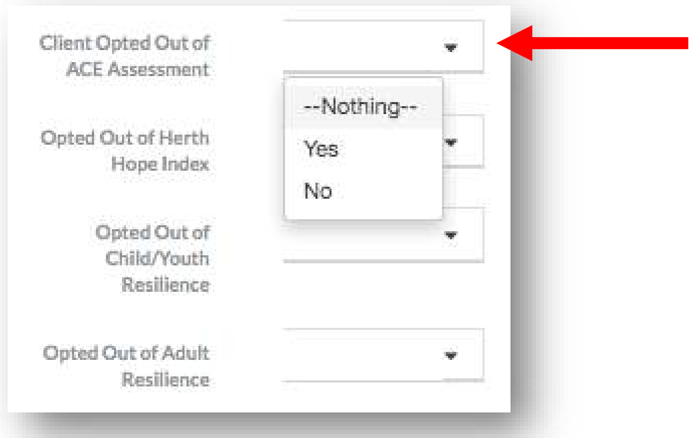
- ***A new window will appear with a complete Arizona Self-Sufficiency Assessment. After you complete the questions for each section, a 'Score Value' will generate for that section. The higher the score, the more self-sufficient the client in that domain. After completing all questions, click 'Save'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



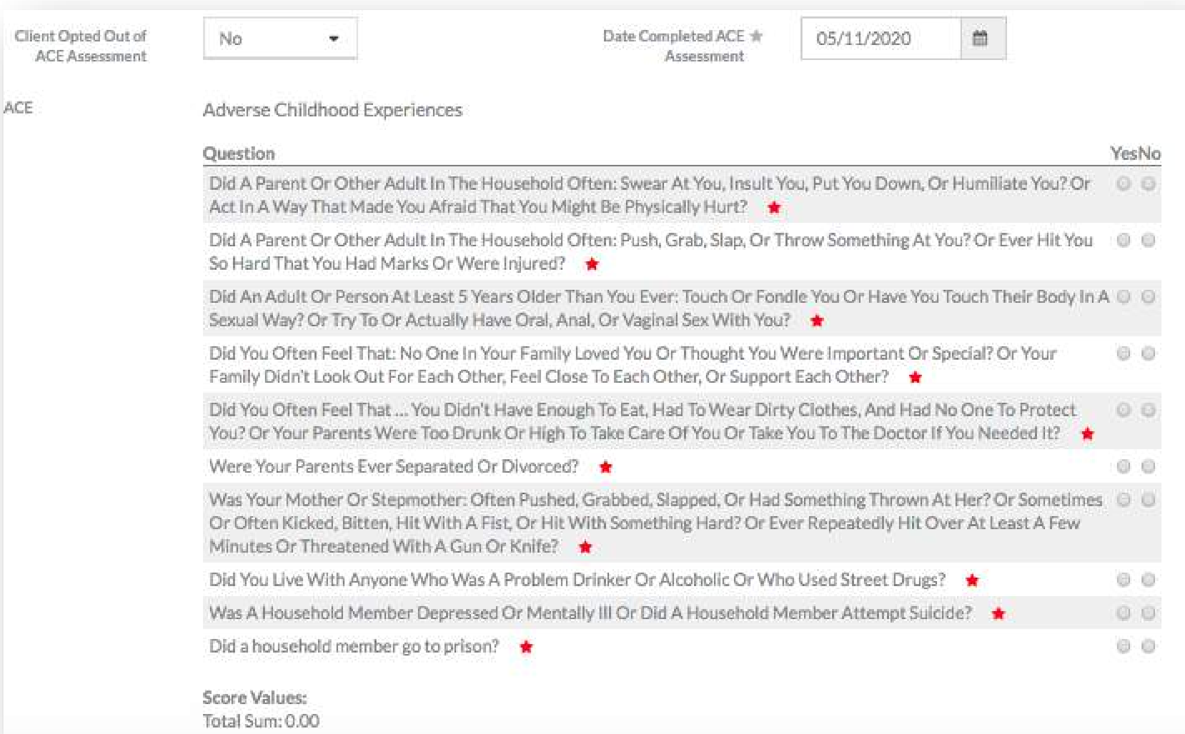
- ***Once finished with the ASSM, click 'Done' in the lower right hand corner of the form.***



- ***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.***

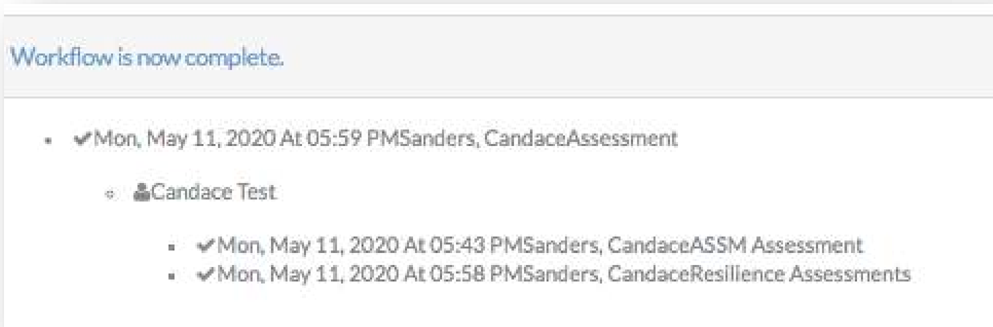


- ***To complete any of the assessments, click the drop down menu to the right of 'Client Opted out of …'. Select 'No' from the drop down list.***



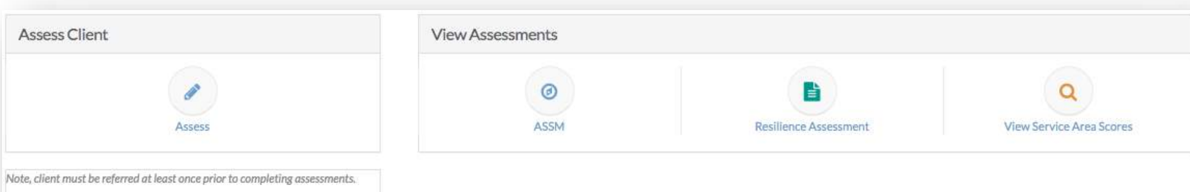
- ***The assessment will appear below the drop down list. The assessment date completed is defaulted to today's date, but can be edited. Complete all required questions for the assessment. After completing all questions, a 'Score Value' will be generated below the questions.***

- ***After completing the desired optional assessments, click 'Save' in the lower right hand corner of the form.***

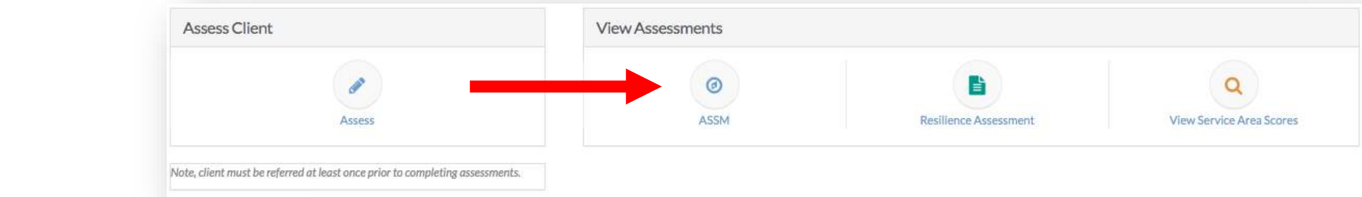


- ***The assessment workflow is now complete.***

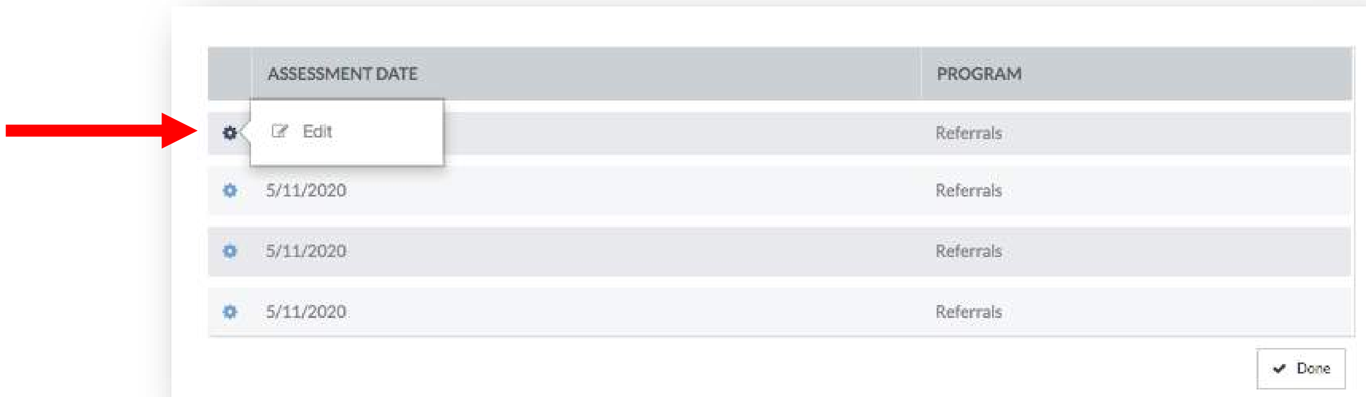
View Client Assessments



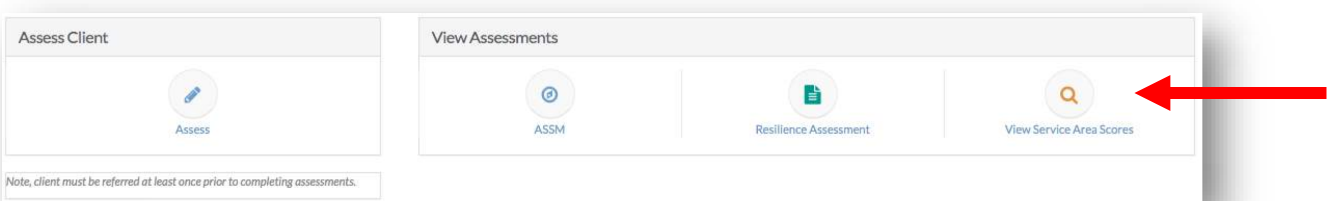
- ***The View Assessments section of the Client Dashboard contains links to past ASSM and Resilience assessments as well as service area scores.***



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

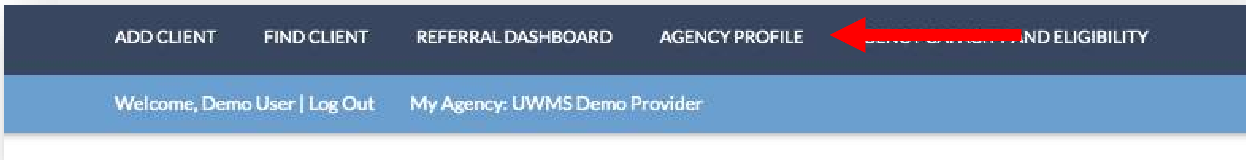


- ***A table of previous assessments will appear. To view the assessment, select the gear in the left column and select 'Edit'.***

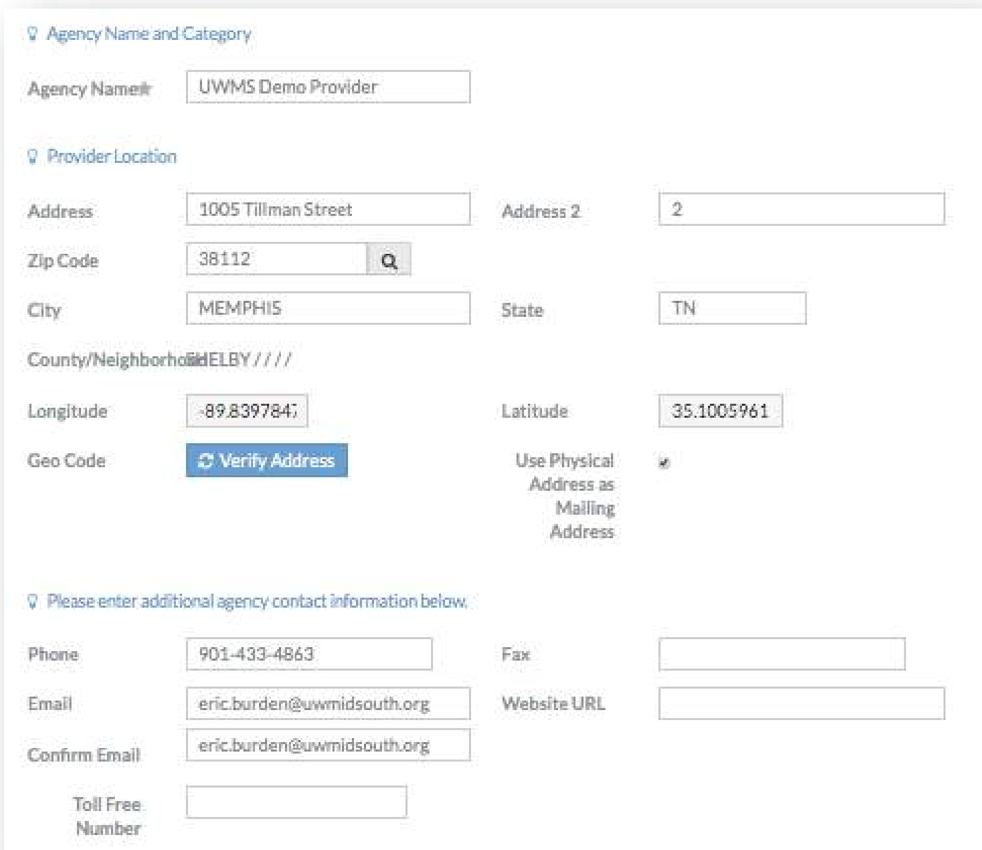


- ***To view service area scores, select the 'View Service Area Scores' button. See 'Add a New Client Referral' for more information about service area scores.***

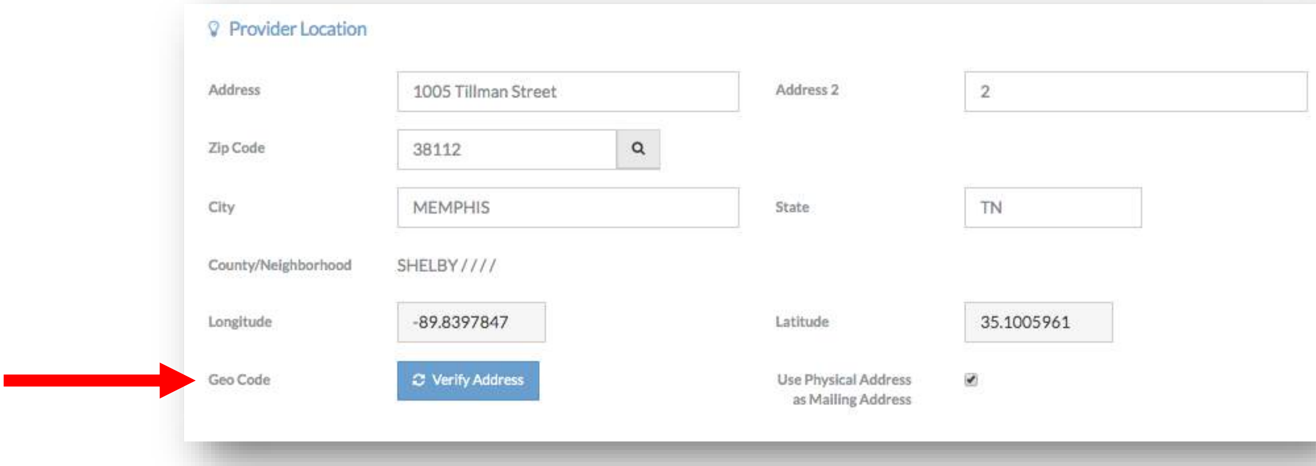
Agency Profile



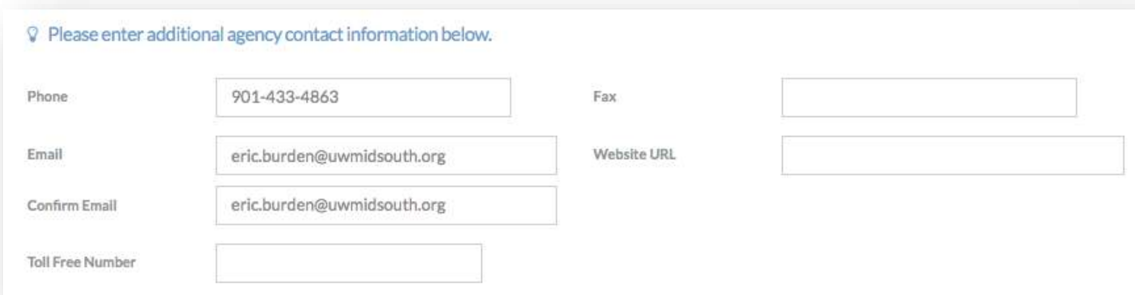
- ***To add view your agency's profile, click the 'Agency Profile' button located on the top navigational bar.***



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

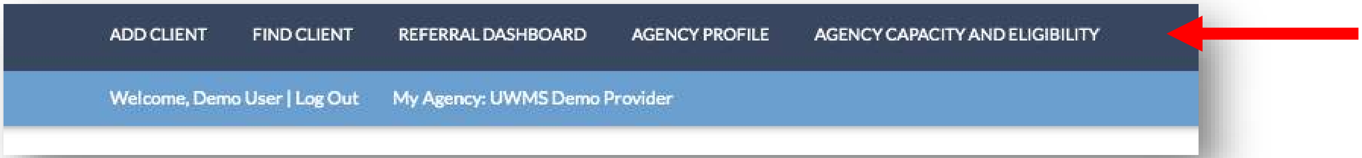


- ***To make any changes to your agency's location, use the fields in the 'Provide Location' section. Verify the address by clicking the 'Verify Address' button.***

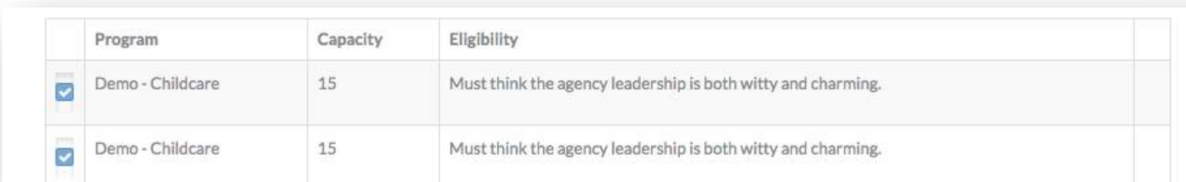


- ***To make any changes to your agency's primary contact information, use the fields in the bottom section of the agency profile form.***

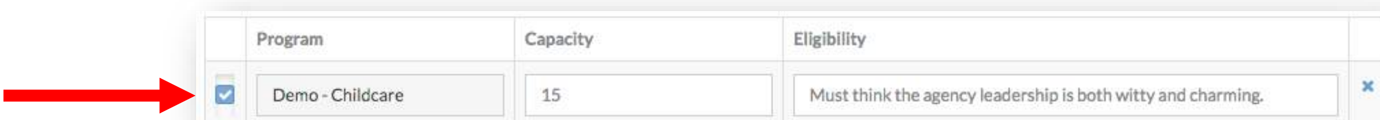
Agency Capacity and Eligibility



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



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



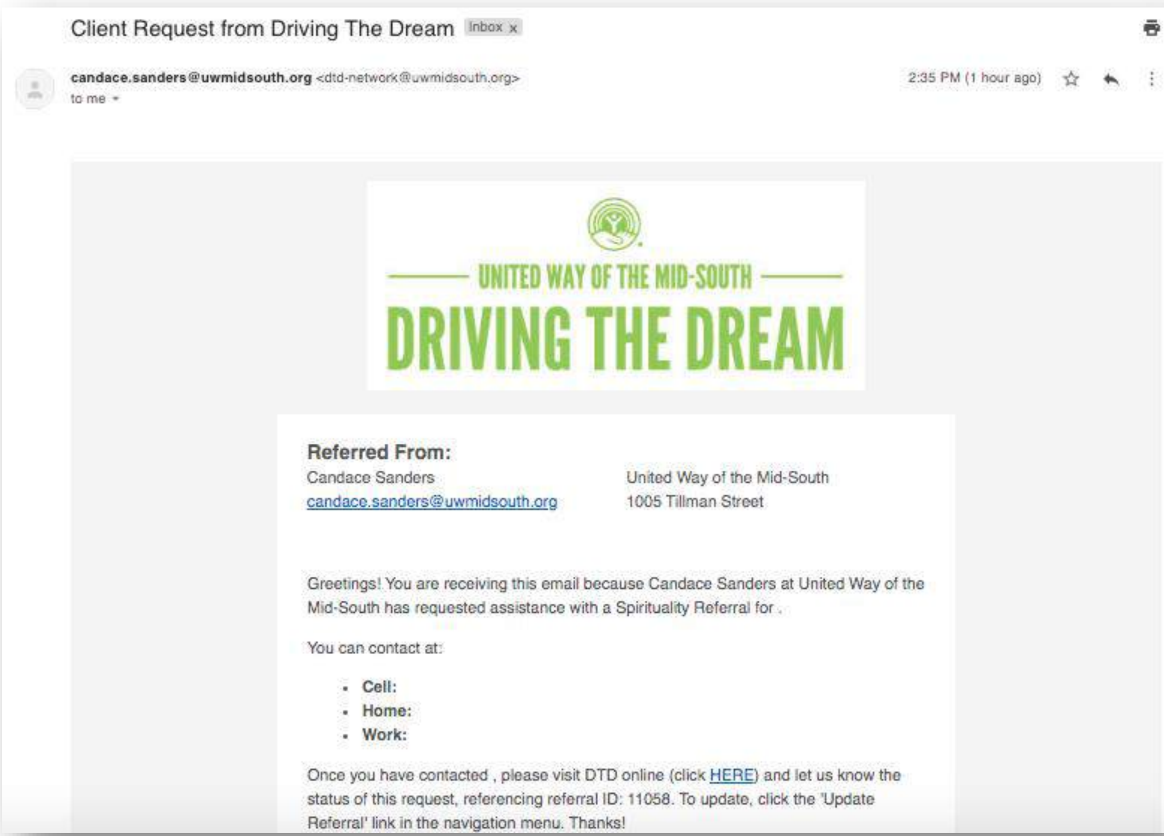
- ***To update the capacity and eligibility information for your agency, click the checkbox located on the left column of the table. The capacity and eligibility fields will turn white and become editable.***

- ***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.***

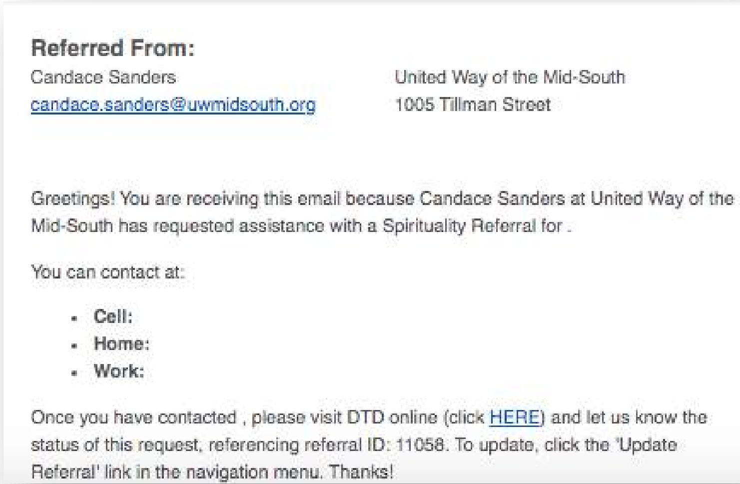
- ***The 'Eligibility' field is a text box. Your agency's eligibility information can be updated at any time.***

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.***



Referred From:

Candace Sanders
candace.sanders@uwmidsouth.org

United Way of the Mid-South
1005 Tillman Street

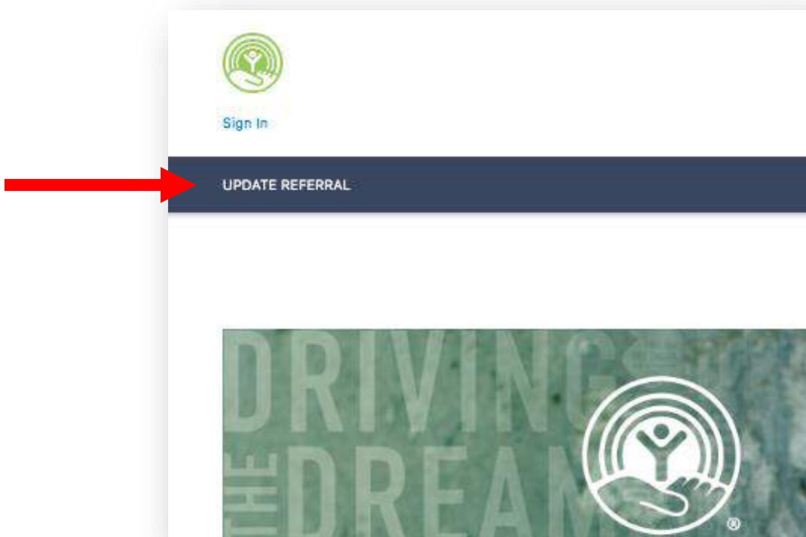
Greetings! You are receiving this email because Candace Sanders at United Way of the Mid-South has requested assistance with a Spirituality Referral for .

You can contact at:

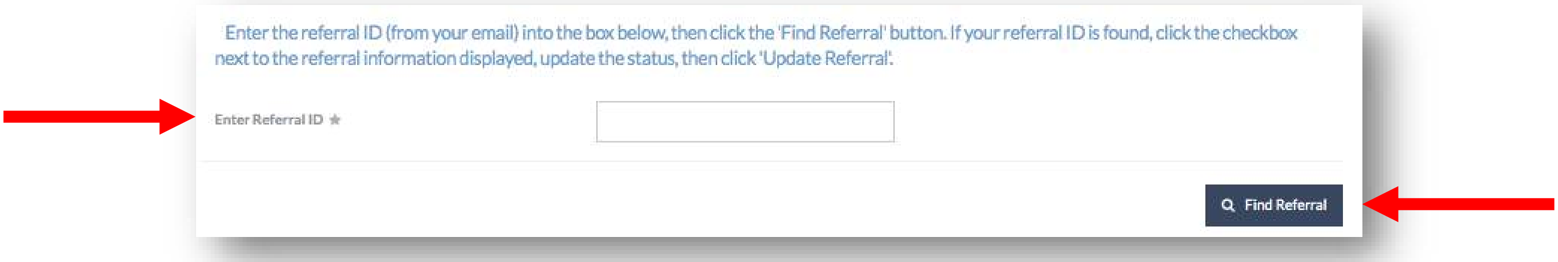
- **Cell:**
- **Home:**
- **Work:**

Once you have contacted , please visit DTD online (click HERE) and let us know the status of this request, referencing referral ID: 11058. To update, click the 'Update Referral' link in the navigation menu. Thanks!

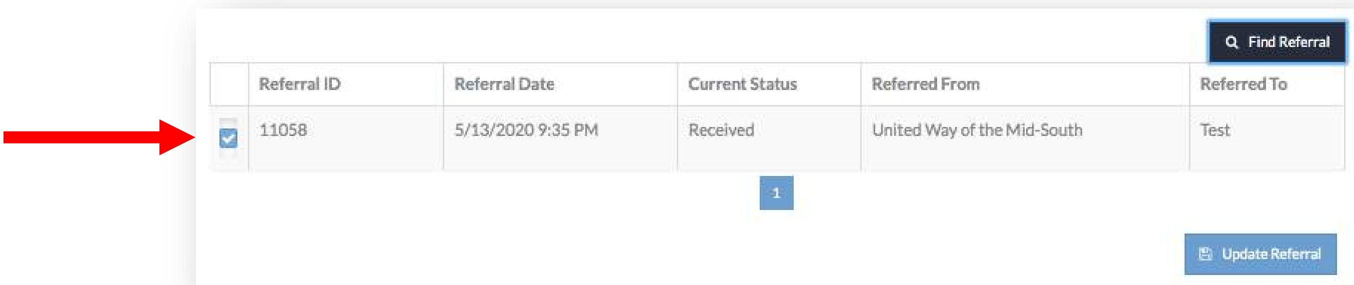
- ***This email contains information such as the Client's name, contact information, the referral service area, and the referral ID. It also contains a link to the CaseWorthy Portal.***



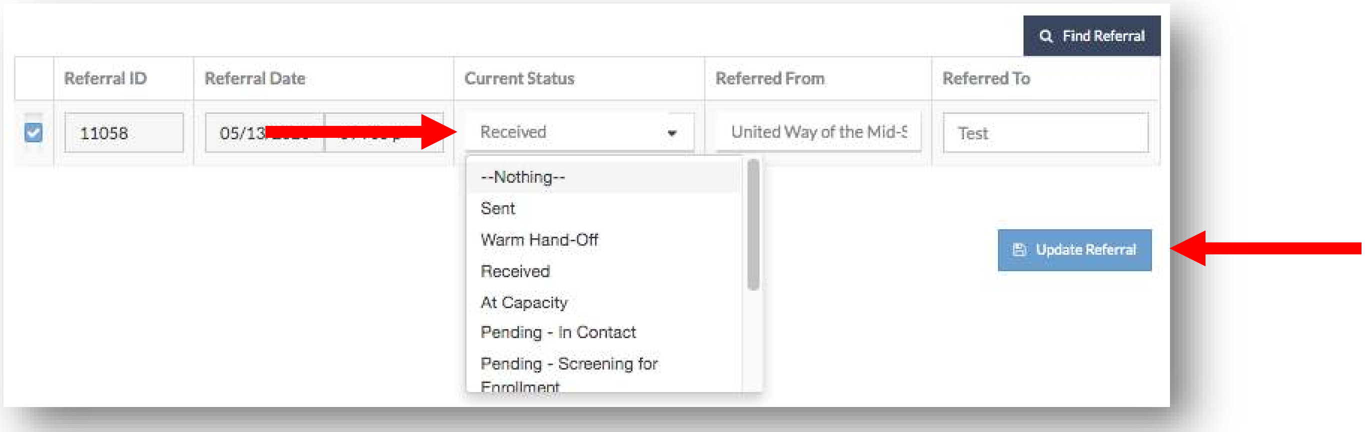
- ***To update a referral, select 'Update Referral' in the upper left hand corner of the screen below the 'Sign In' button.***



- ***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.***



- ***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.***



- ***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.***

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