



Client History and Case Attachments & Uploading Documentation

February 2022

2021-2022 Advanced Training Topics



Completed with Videos & Handouts

- ✓ Holiday Programs
- ✓ Client Merge
- ✓ Annual Report
- ✓ Beginners Case Intake
- ✓ Pledges
- ✓ Beginners Treasurer
- ✓ Vendor Maintenance & Conf. Reports
- ✓ Gift Cards and Vouchers
- ✓ **Client History; Case Attachments; Uploading Documentation**

Planned

- Express Assistance – March 8, 2022
- Red Flag – April 5, 2022
- CMS Support Community Website – May 10 , 2022
- Others ??? – We Need Your Input**

Agenda



- Review Handouts
- Client History
- Case Attachments
- Uploading Documentation
- Viewing Attachments and Documents

Client History and Case Attachments



Case Record Form w/History

➤ My Assigned Cases:

- Prepare Tab | With History
- All Tabs - Case Options | History

➤ Search:

- Cases | History
- Cases by Case Worker | History
- Clients | History | Update

Case Attachments

➤ Uploading Attachments:

- Configuration Setting: My Conference | Configuration | “Enable Attachments Tab in Case”
- Attachments Tab | Upload Button
- The “File Name” MUST be unique
- File Formats - PDF (Preferred), JPEG, PNG
- Retained for 7 Years

➤ Viewing Attachments: Search | Documents

Uploading Documentation

Authorized Roles: Officers & Conference Administrators



➤ My Conference | Documentation Tab

- Conference Reports
 - Uploaded by System
- Bank Statements
 - Uploaded by Treasurer
- Meeting Minutes
 - Uploaded by Secretary
- References
 - Uploaded by Conference Administrator – Examples:
 - Other Assistance Resources; Financial Guide Lines; Intake, EFSP, and Collection Procedures
- Record Forms
 - Uploaded by Conference Administrator – Examples:
 - Blank Case Record; Pharmacy Referral; Thrift Store Referral; Member Reimbursement; Check Request; W-9