

You care about helping people. We care about helping you do that efficiently and effectively.

CaseWorks™ Financial Services Edition helps Eligibility Workers administer public assistance programs for food, cash, childcare, and emergency programs so that the people in your community can thrive.



### Financial Services Edition Key Features

- Includes all Caseworks purpose-built standard features (see reverse side)
- Autofill Forms & Packets**  
Electronic Signatures; Client, Caseworker & Participant autofill; Update DHS forms
- Configurable workflows to support case banking, individual case ownership, priority documents, routing rules and more!**
- Transfer case documents easily & organize effectively among or across teams**
- Priority case status & flagged documents**
- Casefile Tabs to easily view relevant Healthcare and Workforce Edition documents.**
- Automatic Notifications — Scan and send notification to Healthcare (METS) edition for particular DocTypes**
- Interoperability - Scan once, and CaseWorks automatically sends copies of relevant documents to case owners across HHS units**
- Supports Child Care Assistance Documents, Cost Effective Insurance, Childcare Provider files and Asset Assessment files**



*“The eSignature feature is so efficient in this fast paced environment that we work in! While on the phone with the client, I explained the process, generated the eSignature form via email, client opened and signed the form within the less than 10 minute call. Made this process incredibly quick and painless! Time savings for mailing, reviewing and then processing.”*



Kay, Eligibility Specialist, Scott County, MN

## CaseWorks™ | Better Document Management

CaseWorks™ is a cutting-edge document management system that rapidly deploys updates and responds to your changing needs thanks to our unique continuous delivery approach. More than 150 Health and Human Services Units use CaseWorks™. They choose us for the features we offer, they stay because of the services we provide.

### CaseWorks™ Key Timesaving Features

#### Import paper & electronic docs directly into Caseworks

Scan and Print2CW options

#### Automated Workflows & Document Routing

#### Notifications and Copies

Notify or copy docs to other units; Secondary teams can subscribe to receive copies of case docs

#### Autofill Forms & Packets

Electronic Signatures; Client, Caseworker & Participant autofill; NCT updates all DHS forms per DHS bulletin

#### Modify Documents

Annotate / Redact; Reorder pages; Split & Merge documents; Scan additional pages into existing document

#### Export, Transfer, Copy & Move Documents

Individual or selected groups of documents; Share documents between editions

#### Security

Privilege cases; Role-based permissions; Library level access/permissions

#### Other Features

Intuitive client navigation tool (APN)  
Document menu for quick navigation  
Appointment management  
Tag & untag selected documents  
Manage/share workloads  
File Retention & Destruction  
Archiving & Disaster Recovery  
Statewide Casefile Transfer  
Reports: Documents Processed & Activity Management

