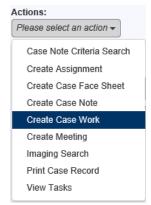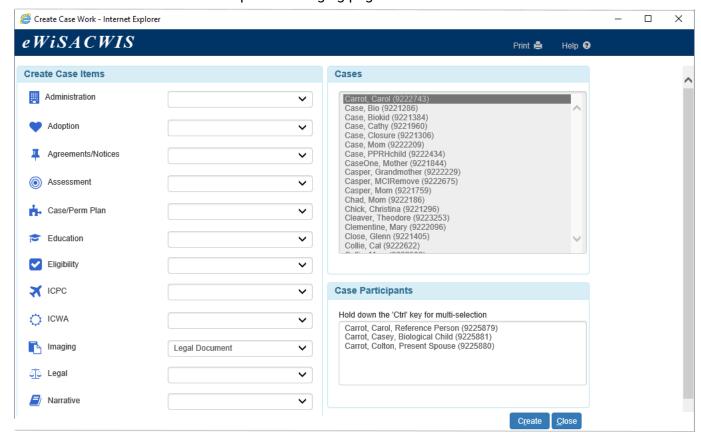# Imaging by Person

Note: To add images, an assignment to the case/provider is not needed. However, additional security is needed for the Imaging Search page.

If you have an assignment to the case:

1. From the desktop, go to the Cases tab and click the Create Case Work hyperlink ❯ Create case work, or select Create Case Work or Imaging Search from the Actions drop-down next to the specific case to open the Create Case Work page.

Actions:

Please select an action ▾

Case Note Criteria Search
Create Assignment
Create Case Face Sheet
Create Case Note
Create Case Work
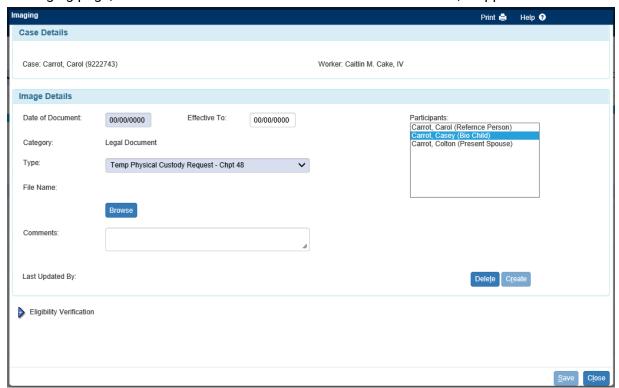Create Meeting
Imaging Search
Print Case Record
View Tasks

2. On the Create Case Work page, select the appropriate category from the Imaging drop-down for the type of imaging document you would like to upload.

3. Select the Case and the Case Participant that the image is for. If the image is for multiple participants, select your participants by holding the control (Ctrl) button while clicking on the participant's name.

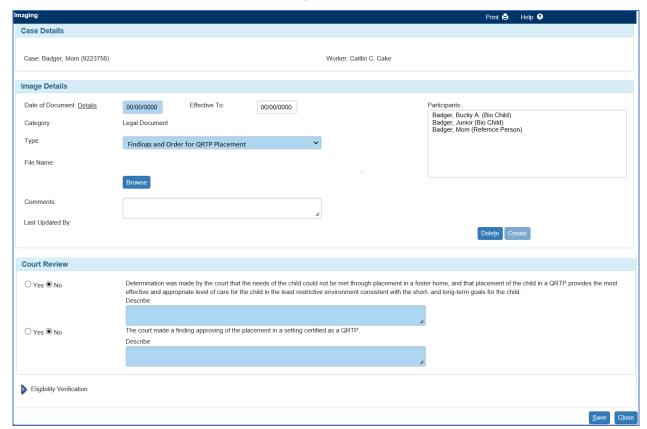4. Click the Create button. This will open the Imaging page.

5. On the Imaging page, enter the Date of Document and an Effective To date, if applicable.
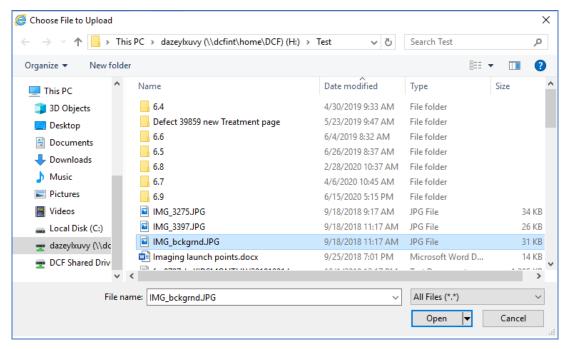

6. Select the type of document from the Type drop-down. Each category has a different list of types. If your document is not listed, select the 'Other' option. For example, 'Other-Court Order' or 'Other-Participant Document.'

Note: When the Type of Findings and Order for QRTP Placement is selected for the Category of Legal Document, the Court Review section displays with required questions.
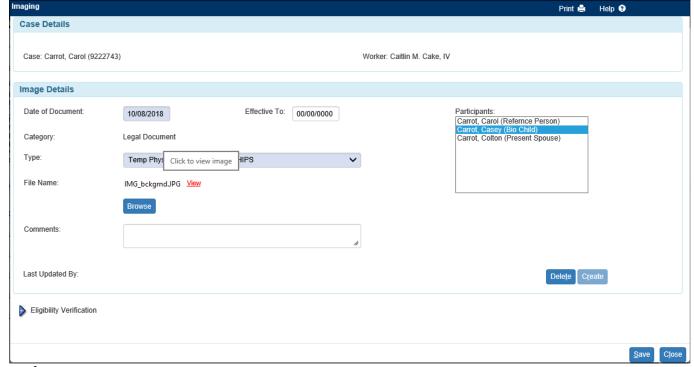
7. If you have not already done so, select the participant you would like the document attached to. If applicable, you can multi-select participants by holding the control (Ctrl) button while clicking on the name.

   Note: For the Type of Findings and Order for QRTP Placement, only one participant can be selected.

8. To attach a previously scanned document, select the Browse button. This will open the 'Choose File to Upload' page.

9. Select the scanned file from the appropriate location/folder. Once the file is selected, click the Open button.

Note: Files must contain the following extensions to be attached: bmp, jpg, jpeg, rtf, doc, docx, xls, xlsx, tiff, tif, and pdf and cannot exceed 25 MB.

10. Prior to saving the page, you can view the document by clicking the View hyperlink next to the File Name.
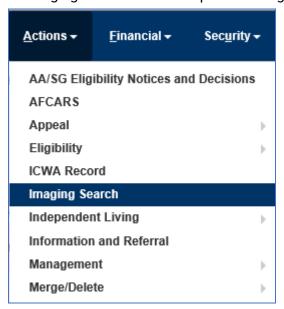
11. Enter any comments in the Comments field.

12. When all required fields have been completed, click Save.

13. At this point, you can delete the document if you added it to the wrong case by clicking the Delete button. If you added the document to the wrong person in this case, update the Participants box with the correct person.

    Note: If the Image Type of Findings and Order for QRTP Placement is linked with the Permanency Plan, the Delete button will be disabled.

14. You can also create new images for this case by selecting the Create button and following steps 5-12.
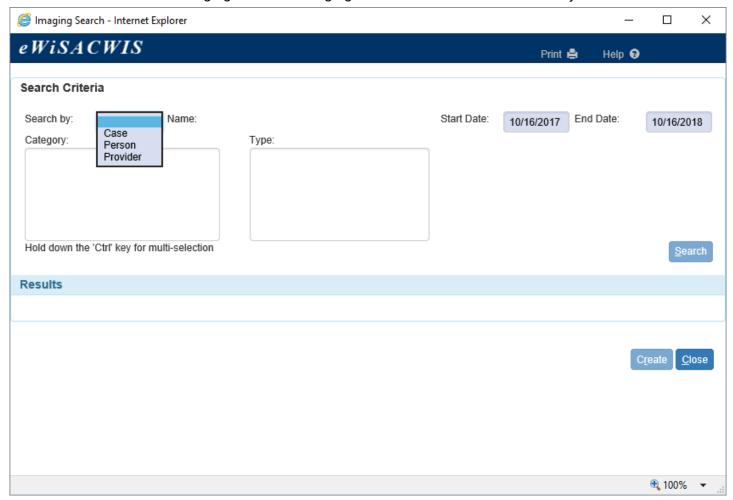
If you do not have an assignment to the case:

1. From the desktop, click Actions > Imaging Search. This will open the Imaging Search page.

2. On the Imaging Search page, select Person in the Search by drop-down. This will open the Case Search page.

   Note: Please see the Imaging Case and Imaging Provider User Guides to search by Case or Provider.

3. On the Person Search page, enter the Last Name and First Name or Person ID to conduct your search and click the Search button. In the Persons Returned section, select the radio button next to the correct person and click the Continue button.

4. This will bring you back to the Imaging Search page. The page will now display all documents for the person for all cases the person is attached to. The results will display any documents with effective dates from the past year, unless the Start Date and End Date have been updated.

If there are no documents, a validation message displays stating that no matching data were found for the criteria specified. To add a document, select the Category and Type of document, and click Create.

5. On the Imaging page, select the Case for the participant. The list of cases will identify whether the case is currently open or closed. Enter the Date of Document (and an Effective To date, if applicable).

6. To attach a previously scanned document, select the Browse button. This will open the 'Choose File to Upload' pop-up.

7. Select the scanned file from the appropriate location/folder. Once the file is selected, click the Open button.

Note: Files must contain the following extensions to be attached: bmp, jpg, jpeg, rtf, doc, docx, xls, xlsx, tiff, tif, and pdf and cannot exceed 25 MB.

8. Prior to saving the Imaging page, you can view the document by selecting the View hyperlink next to the File Name.

9. Enter any comments in the Comments field.

10. When all required fields have been completed, click Save.

11. At this point, if you added this document to the wrong case for this participant, update the Case drop-down. If, for any other reason this document is incorrect, click the Delete button to remove the image.

Note: If the Image Type of Findings and Order for QRTP Placement is linked with the Permanency Plan, the Delete button will be disabled.

12. You can also create new images for this case by selecting the Create button and following steps 4-10.

13. Click Close. This will return you to the Imaging Search page.

14. The Imaging Search page will display all documents for the Category and Type you selected, based on the Start Date and End Date (the default is the past year). To view the image for a particular result, click the hyperlink in the File Name column to access the scanned document directly, or click the Edit hyperlink to access the associated Imaging page.

15. You can also view the documents that you have just added on your desktop or the Search page. Expand the icon in which the document is attached to (such as 'Legal' in the example shown below). You will see the Images icon with the number of images for that category of document listed. Expand the Images ⊕ icon to select the document you are looking for.

Carrot, Carol (9222743) (HTML4)

Case details:	Case address:	Primary worker:	Actions:
CPS Family - Initial Assessment		Cake, Caitlin M., IV	Please select an action ▾
Milwaukee-Region 2		(123) 456-7890 Ext. 1234	
Open OHP exists for associated participant(s)		caitlin.cake@wisconsin.gov	

⊖ **View case information**

📞 Access Reports	◎ Assessments	🏛 Assets and Income	☰ Assignments
☑ Eligibility	⚖ Legal	👤 Medical/Mental Health	🛏 Placements
🛡 Planning	👥 Related People		

⚖ **Legal**

⊖ Images (7)

Legal Document - Order Granting Temporary Extension (Details)	10/16/2018	Carrot, Casey
Legal Document - Petition - CHIPS (Details)	09/21/2011	Carrot, Casey
Legal Document - Temp Physical Custody Order - CHIPS (Details)	01/31/2018	Carrot, Casey
Legal Document - Temp Physical Custody Order - CHIPS (Details)	01/29/2018	Carrot, Casey
Legal Document - Temp Physical Custody Request - Chpt 48 (Details)	10/16/2018	Carrot, Casey
Legal Document - Temp Physical Custody Request - Chpt 48 (Details)	01/29/2018	Carrot, Casey
Legal Document - Inactive value: Temporary Physical Custody Order (Details)	10/12/2011	Carrot, Casey

👤 **Medical/Mental Health**

⊖ Images (1)

Medical/Mental Health - Dental Record (Details)	11/03/2010	Carrot, Casey