Dibcase User Manual

Version 1.1.3

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25 N Market St
Jacksonville, FL 32202
Phone (904) 515-6243
www.dibcase.com

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Welcome

Welcome to the Dibcase Legal Case Management Application. Dibcase was designed for Attorneys, Non-Attorney Advocates, Case Managers, Records Clerks, and Staff Members involved in Social Security Disability Case Management. We hope you will find the application powerful, intuitive, cost-effective, and a time-saver.

Getting Ready For Dibcase

Dibcase represents a new generation of cloud based SAAS or "Software As A Service" applications that don't require users to purchase, manage, maintain, and backup a server.

Storage Setup

Dibcase integrates with Dropbox and Google Drive to ensure your files are secure, accessible, and portable.

Before using Dibcase for the first time, we recommend choosing and creating a storage account either locally or online.

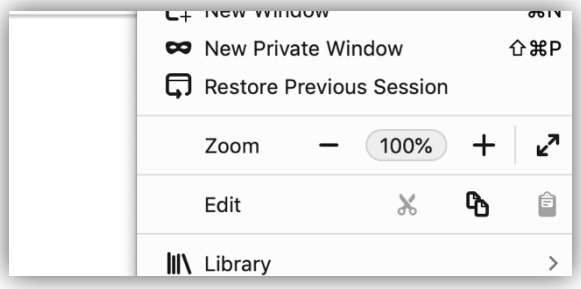
Google Calendar

Dibcase includes its own fully functional calendar. For convenience, Dibcase integrates with Google Calendar, which, when properly configured, allows you to receive appointment alerts and emails of your daily agenda. You must establish a free Google account to take advantage of this integration. You can

also download the free Google Calendar app to get alerts and reminders on your cell phone or other mobile device(s).

Configuring Your Browser

Dibcase uses your web browser as the interface with which you will create, edit, and view your client, claim, and other Dibcase related dates. You will print using the setting in your preferred browser. Dibcase has been tested and works with Mozilla Firefox, Google Chrome, and Microsoft Edge.



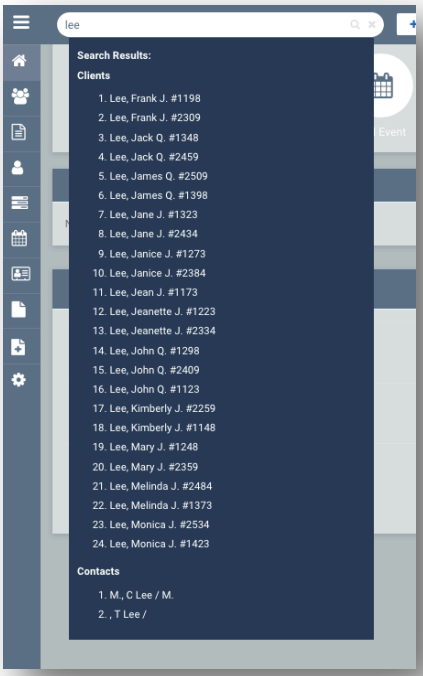
Resizing The Dibcase Window

To make your text larger or smaller, you can "Zoom" in or out on your browser. You can use Dibcase in full screen or in a window. Dibcase is responsive and will automatically resize its content to the size of the window being used.

Configuring Your Print Preferences

By default, some browsers will insert extra information in the form of headers and footers in printed documents. This behavior can be disabled by properly configuring your browser. For detailed instructions on how to disable this behavior, see our supplemental information section at the end of this manual.

Basic Navigation



Once you login to Dibcase, you'll discover that the fastest way to search for clients and contacts is by using the header search box.

To find clients and contacts, begin by typing the last name, as in the illustration. Once you've typed in the last name, press enter to lock the search. If you do not press enter, Dibcase will keep searching and you may not get the results you want.

Note: The main header search bar shows all clients regardless of whether they are "Active" or "Closed" or some other status.

Other Ways To Find Clients

Clients can also be selected from the "Client List Page" where you can filter based on "Last Name" and custom Client Tags.

The "Claims List Page" allows you to select clients that have claims in Dibcase. You have even more specificity with filtering claims based on the:

- Claim's Tags
- Primary Representative
- Case Manager
- Claim Status

These filters are useful, but only if you've have indicated and assigned these parameters to the claim(s).

Basic Terminology

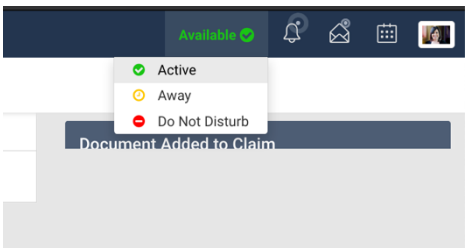
Term	Definition
Admin - Firm	The single individual that has full unrestricted access to all settings, pages, modules, etc. in Dibcase.
Claim	A claim in Dibcase is a case. Just like a hard copy or electronic file on your computer, you'll enter all of your client's relevant medical conditions, medications, attach documents, track fees, etc. A client in Dibcase can have an unlimited number of claims.
Client	An individual that hires you to perform legal services. In Dibcase clients have their own table and are treated separately from "contacts" On the client's page, you'll enter all of your notes, appointments, tasks, documentation, on the multiple tabs.
Contact	An individual auxiliary to a claim such as judges, social security offices, medical providers, witnesses, etc.
Custom Field	A user defined field that has a label and stores data. Custom fields are created on the "Customizations" page.
Custom Field Group	A collection of custom fields functionally arranged together that can be added to a client's page to enhance functionality.
Firm	The "company" that is the primary organization providing case management and legal services to clients.
Intake	The manual process of adding a new client and associated claims.
Integrations	3rd party applications connected to Dibcase to enhance functionality. Examples include Google Calendar, Dropbox, and Google Drive.
Roles - Claims	Dibcase incorporates several roles to help organize your clients and claims workflow. These include: • Client Owner • Referral Source • Individual Referrer • Primary Rep. • Hearing Rep. • Case Manager

	• Custom Fields, should you need to create and assign more roles.

Client Statuses

Client Status	Use Cases
Active	Once a decision to retain the client has been made and a representation package has been signed, a client is "Active". When you do a client intake in Dibcase, the case is set as "Active" by default.
Prospect	A person that is not a "client" or no longer a client, but you want to keep open – such as a referrer.
Lead	A person whom has begun the intake process but has not signed a representation package.
Inactive	A case that for whatever reason is no longer active but not ready to be closed. A use for this status could be a case where you've withdrawn representation, but have submitted a fee petition.
Deferred	A user defined field that has a label and stores data. Custom fields are created on the "Customizations" page.
Closed	A client that has no active matters, and you have no ongoing active relationship.
Rejected Lead	This is an individual that you chose not to represent but you keep on file to document the situation.

Setting Your Presence Indicator



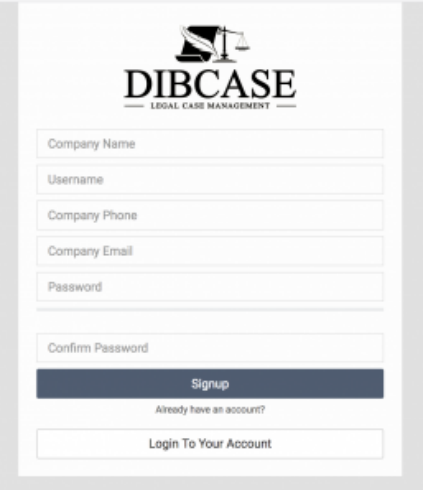
By default, when you log in to Dibcase, your presence is set to "Available". If you plan to be "Away" or need to set your status to "Do Not Disturb", those options are available. Your status will be visible to other employees on the Dashboard Employees Panel.

Quick Start

Step 1: Creating A New Account (Firm Admin Only)

By default, when you establish a new Dibcase account, that account is the "Firm Admin" account. There can be only one "Firm Admin" associated with a Dibcase account.

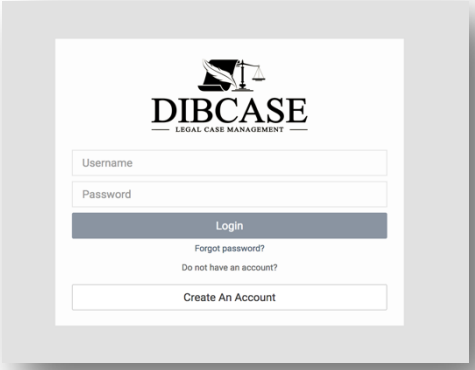
Once you have subscribed to Dibcase via the pricing page, you will be redirected to a page to create your Dibcase account. Complete the account creation details and you will be sent a confirmation email to your firm email address that you provided.



A valid email address is required to complete the registration process. Once you validate your email address, you can begin the registration process.

Note:
You must provide a unique user name. Each Dibcase user must have a unique user name for security purposes. You will also be assigned a firm 'ID" that uniquely identifies your firm.

Once you've successfully registered and created your new Dibcase account, you will login through the https://www.dibcase.com/app/ - /login website using your "Username" and "Password" you created to login to Dibcase.



Setting Your Password

Security begins with setting a strong password. Dibcase has a built-in password complexity checker. Although not required, you should make sure that you and your employee's passwords are "strong". Strong passwords include uppercase and lowercase letters, digits, special symbols, etc.

Note: Dibcase requires users to change their passwords every 30 days.

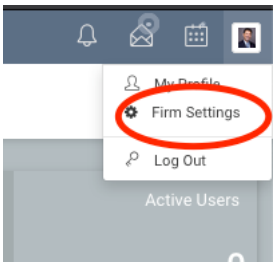
Reset Password

If you forget your password, press the "Forgot password" button to reset your password. Password reset instructions will be sent to the email address you registered for Dibcase with.

Setting Your Color Preferences

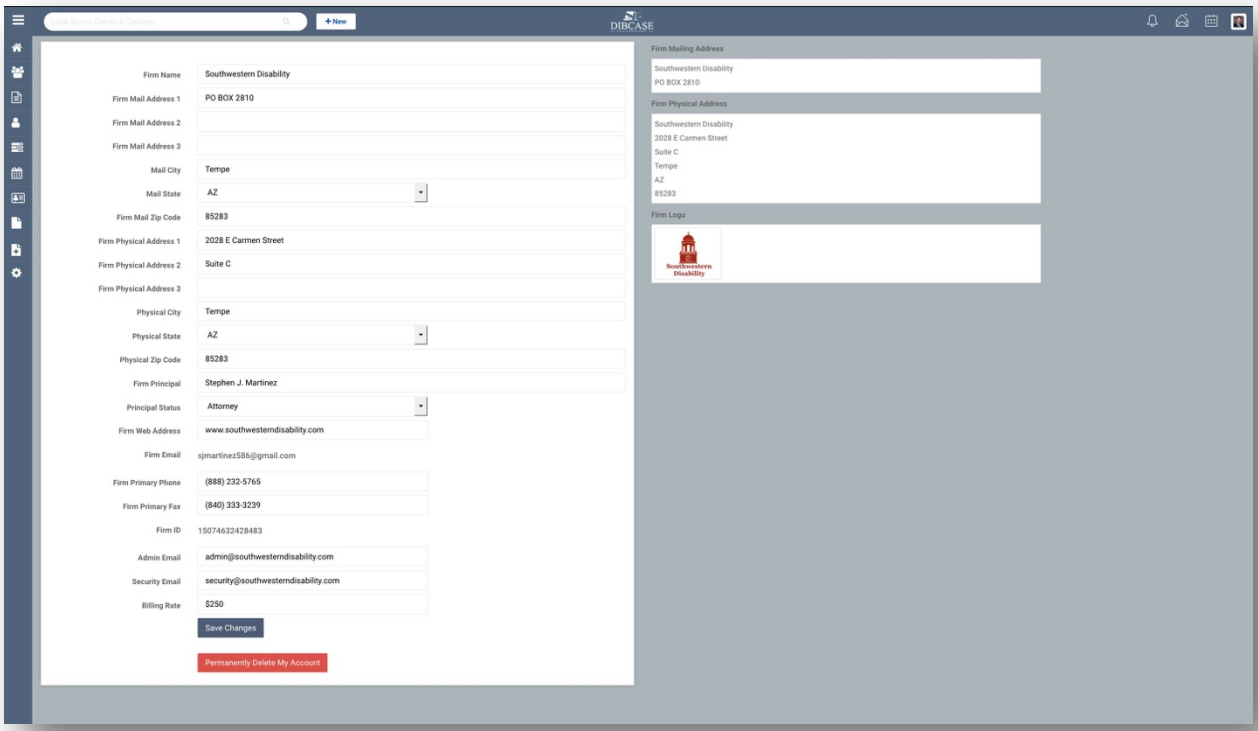
Dibcase comes with 5 basic color schemes. These schemes can be set on the "My Profile" page which is accessed via the menu on the upper right menu and the "picture" icon. You can add your picture which will appear on the "Today's Appointments" panel and "Message Board" dashboard panels.

Step 2: Adding Your Firm To The "Firm Settings" (Admin Only)



To access the "Firm Settings" tab, click in the upper right corner of the header menu and select "Firm Settings.

Make sure to enter your firm's full address and contact information into the proper. This is important because your firm's contact information will merge into your documents.



Dibcase Firm Settings Page

If you have more than one location for your firm, you can use that firm's location information in your document generation process.

Note: Billing rate is the firm default rate that will appear when you export client notes for fee petition and billing purposes

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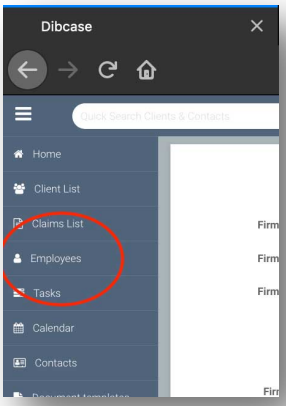
Step 3: Adding Users / Employees (Admin Only)

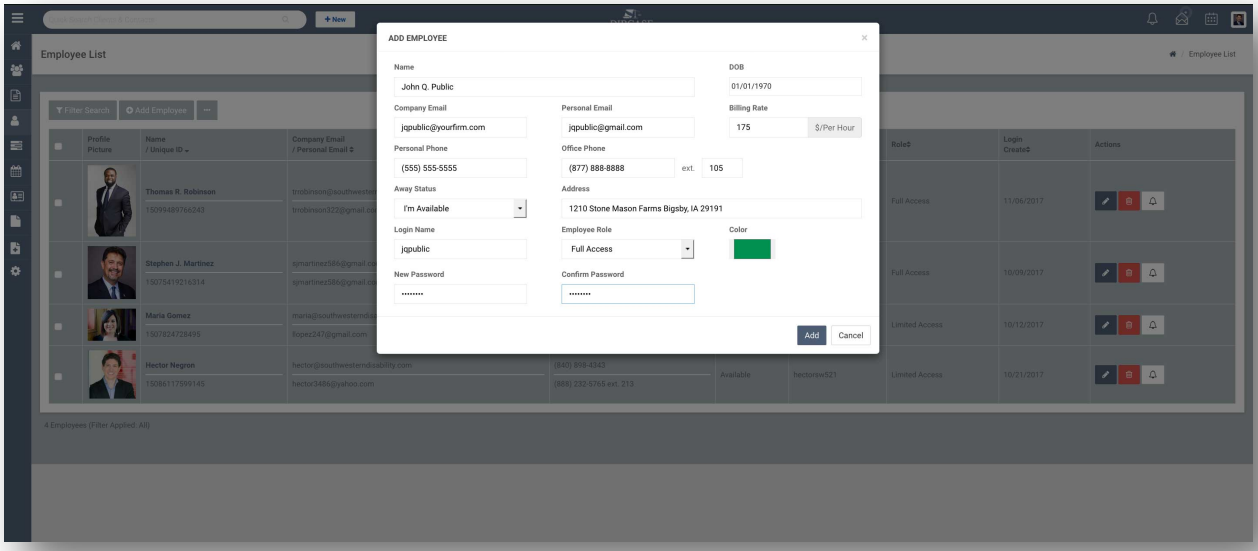
Adding users and all employee related data can be accessed on the sidebar "Employees" (Figure 1-C) tab.



Dibcase Employees Panel Tab

Once you click on the "Add Employee" button you will see a popup (Figure 1-D) that will request the information required to create a new employee.

Note: Each employee can be assigned a "Billing Rate" and Dibcase will automatically assign and calculate fee petition amounts based on this value.



Add Employee Popup

Tips For Setting Up A New Employee (Admin Only)

Assigning Roles

In Dibcase there are three "Employee Roles"

1. Administrator
2. Full Access
3. Limited Access

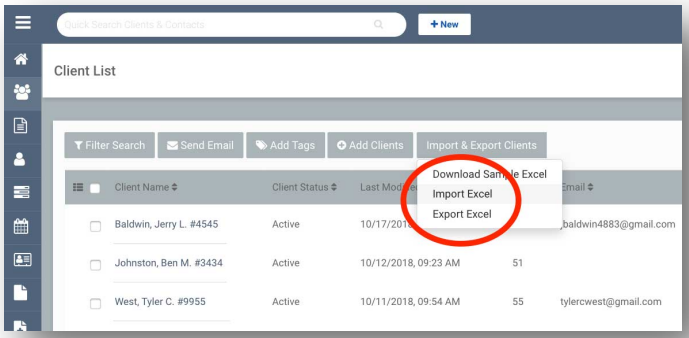
Generally, you want to give each employee only enough access to do their job. The "Limited Access Role" restricts users/employees and prohibits them from:

1. Deleting Clients & Claims
2. Accessing Fee Related Information
3. Exporting Client & Claim Information
4. Creating integrations, custom fields, and custom field groups

Changing User Passwords (Admin Only)

Admins may access the Employees panel and change user passwords in the event an employee forgets their password

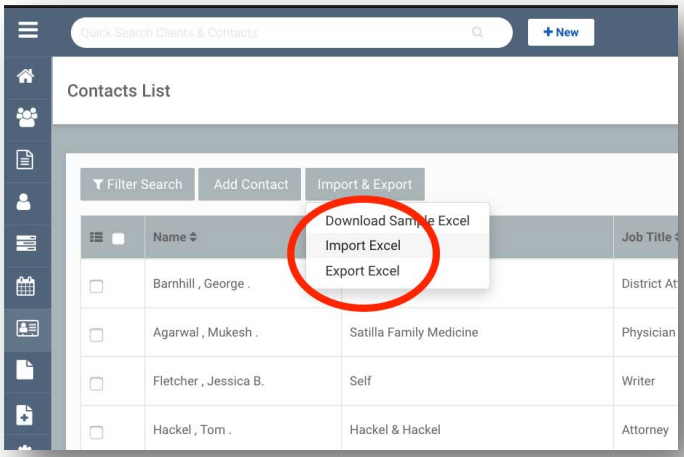
Step 4: Importing Clients



Import Export Client Menu

Clients can be imported by creating an Excel file that has the proper headers for your data. You can download a sample Excel file which has the proper column headers to ensure that you can import your client data into Dibcase.

Step 5: Importing Contacts



Import Export Contacts Menu

Your contact list is important because this is your address book in Dibcase for medical sources, social security offices, judges, etc.

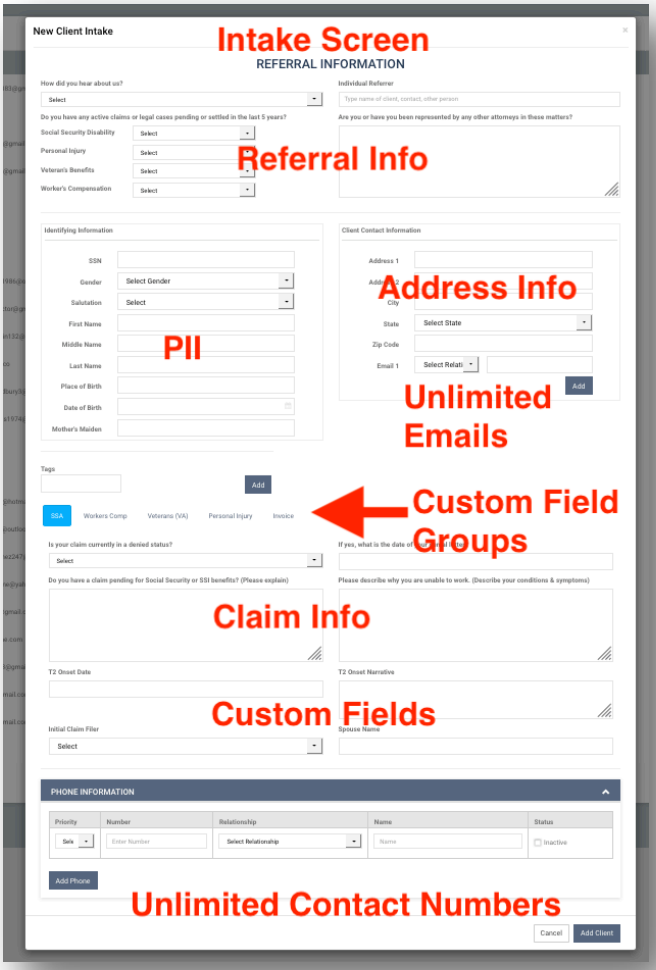
Contacts are attached to claims and are used when creating merge documents.

Step 6: Your First Client Intake

The intake process in Dibcase is straightforward and allows you to collect standard contact information, pertinent PII, and add any additional custom information that you may need depending on the matter type.

You can create custom intake forms and you should refer to the Custom Fields Groups section for more information how to create them.

Certain fields are required to complete an intake. This is to ensure that important information is gathered at intake.



Required Fields

- SSN
- Gender
- Salutation
- First Name
- Last Name
- Date of Birth
- Address 1
- City
- State
- Zip Code

Phone Information (One Number Required)

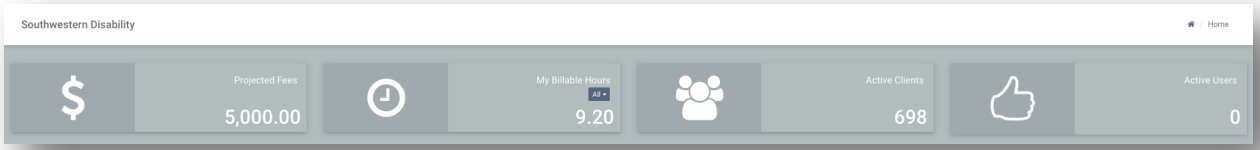
Phone
Priority
Relationship

End of Quick Start Section

The Dashboard

Whenever you login to Dibcase, you will see the Dashboard Page. The following objects will appear on the Dashboard:

Dashboard Counter Boxes



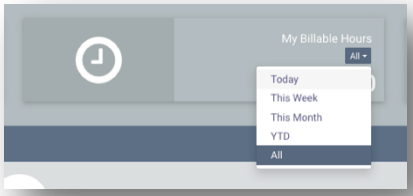
Projected Fees (Admin Only)
This is the sum of all claims and the amounts in the "Projected Fees" field on each SSA claim (SSA Only)

My Billable Hours

You can show your billable hours that you've generated Today, This Week, This Month, YTD, and All.

Active Clients

Shows all firm clients that are designated as "Active".

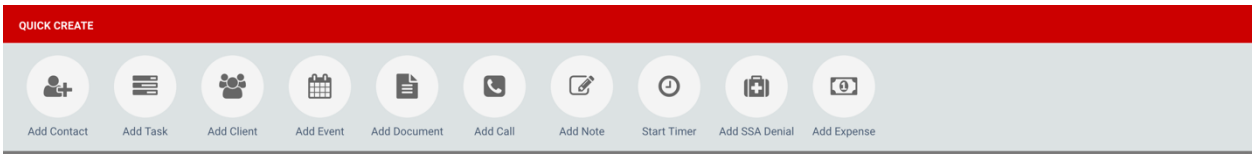


This designator is set on the "Client Page"

Active Users

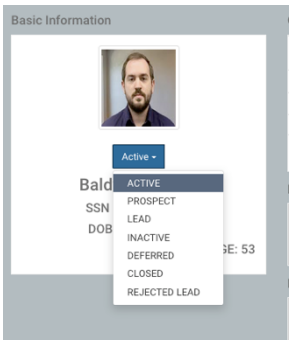
This counter box simply shows the number of individuals from your firm that are currently active.

Quick Create Toolbar



The quick create toolbar is another place to trigger common tasks.

Button	Details
Add Contact	Add a new contact to the contact rolodex
Add Task	Links to the Task List page and creates a new task
Add Client	Links to Client List page and opens "Add Client" popup
Add Event	Links to Calendar and opens "Add Event" popup
Add Document	Links to Document Template Page
Add Call	Opens modal popup to log phone calls
Add Note	Opens modal popup to log a note
Start Timer	Opens a timer for time tracking
Add SSA Denial	Open modal popup to document SSA denials
Add Expense	Opens modal popup to record an expense to the client ledger.



Today's Appointments

Show all appointments and deadlines for the current day.

Tasks

This panel allows you to show all tasks that are due

Today
This Week

This Month
Past Due

If a task has been completed it will appear greyed out. If sub-tasks have been completed they will be marked in green.

Deadlines Panel

Deadlines should be considered a light version of a task. The deadlines custom field designator was added to facilitate processing of custom dates for custom field groups.

This panel shows data for all Custom Fields that are marked with the "Deadline" indicator.
The deadlines are broken down into three categories:
Recent – Recent deadlines
Today – Deadlines that are due today
Upcoming – Represents 7 days into the future

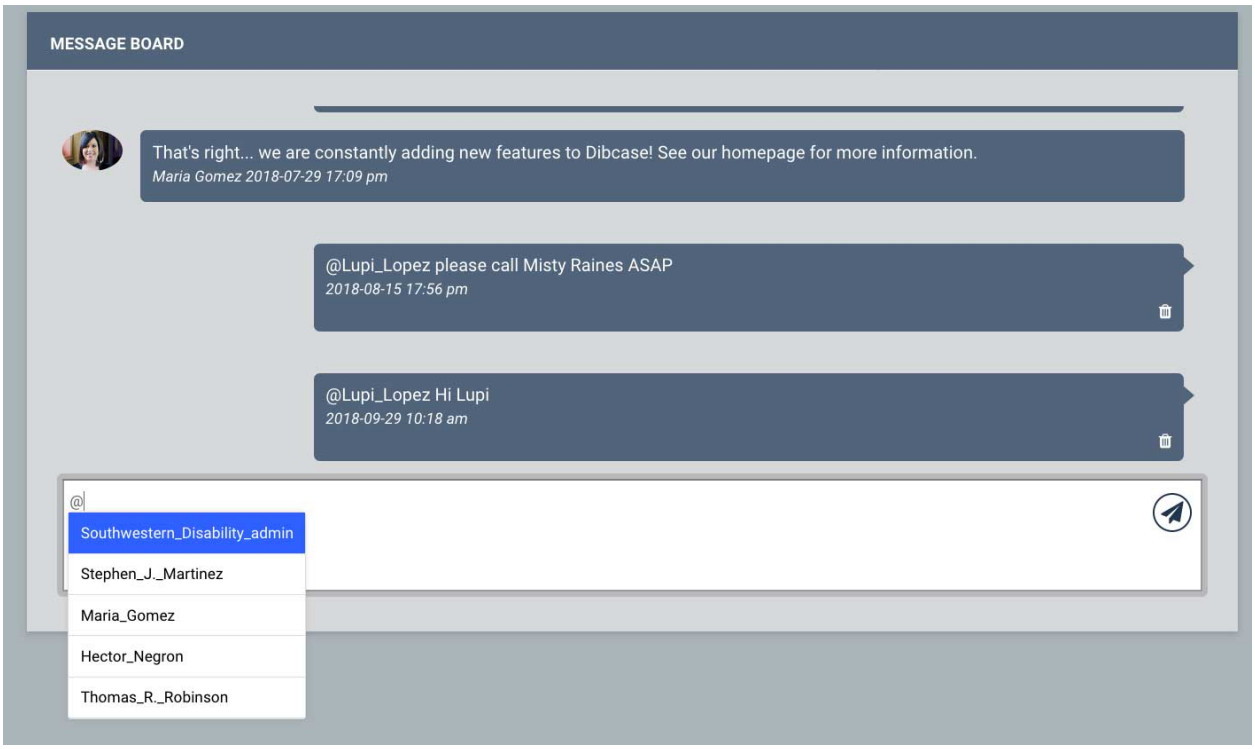
Once action has been taken on a deadline issue, you can click the "Clear" button to indicate action has been taken on the issue.

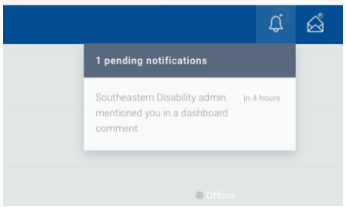
Employees Panel

The employees panel shows a list of all employees that have their presence enabled on the employee page. Employees that are logged in and active will have a "green" presence indicator. Under the employee name it will show a timestamp indicating the employees "last activity". Currently logged in and active employees last activity timestamp will show the current date and time. Users may also be shown as "Offline", "Away", or "Do Not Disturb".

Message Board

The message board allows you to post messages for anyone in your firm to view. If you want to notify a specific employee when creating your message, use the @feature and the recipient will be notified via email of your message.





If you are specifically selected in a message board comment you will be notified in the top menu bar. You can clear the alert by clicking on the message.

Recent Activities Panel

This panel is a running log of events that have taken place inside of Dibcase. The following chart illustrates what events will appear on the Dashboard "Recent Activities" panel

Action
Client Added
Claim Added
Appointment Added
Task Added
Task Completed
Document Added
Tag Added
Tag Deleted
Note Added
Email Sent
Client Contact Information Edited
Client Status Changed*
Record Accessed
PII Tab Accessed

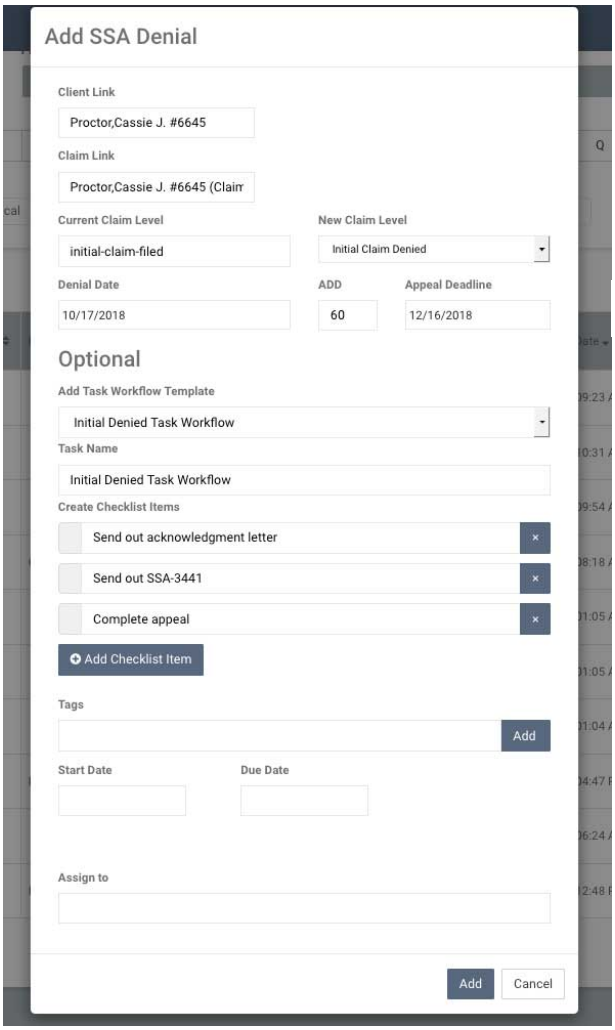
Automations

Add SSA Denial

The "Add SSA Denial" automation allows users to quickly add a denial to an existing SSA claim.

Once a client and claim are selected, the "Current Claim Level" will propagate as in (.)
Add the denial date from the denial letter and the "Appeal Deadline" will be set.

Optional: Add a Task Workflow Template



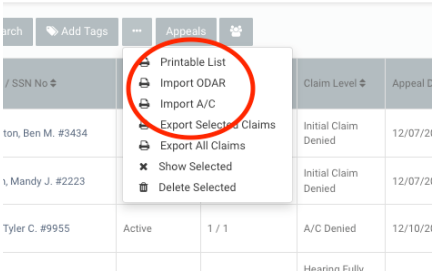
As in the example, you can create a "Task Workflow Template" to process denial workloads like shown in the example.

SSA Denial Automation

Importing ODAR and A/C Spreadsheets

Dibcase saves you time by automating the update of ODAR and A/C records but importing the spreadsheets that SSA provides to Attorneys and EDPNA representatives. If you do not have access to the SSA site and the ability to download these files, contact Social Security for more information about gaining authorization to do so.

Dibcase is configured to automatically match the data from the spreadsheet and update the relevant fields within the application.



Note: Dibcase does not update hearings or A/C fields for cases that you indicate are "Closed". Dibcase will highlight these cases in red during the import process.

The import process of ODAR and A/C spreadsheets begins on the "Claims List Page".

Note: Because of the precise matching process, some cased may not import properly if there is a name discrepancy. This can be corrected by examining the client's name on the spreadsheet and comparing it with the client's name on the "PII" tab on the client page. Once you've changed the client's name – including middle name – to match that of the spreadsheet, you may re-import the spreadsheet and verify that the record is importing properly.

Calendar

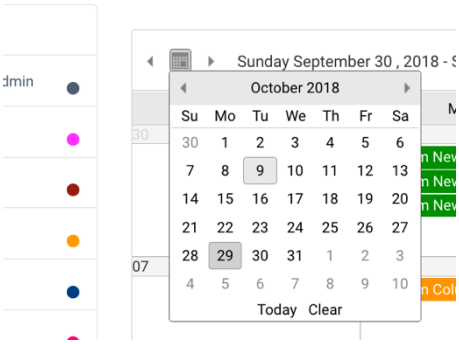
The Dibcase calendar shows the following information:

1. Pending Events (Appointments)
2. SSA Appeal Deadlines (Off by Default)
3. Task Due Dates (Off by Default)
4. Hearings (On by Default)

Calendar Views

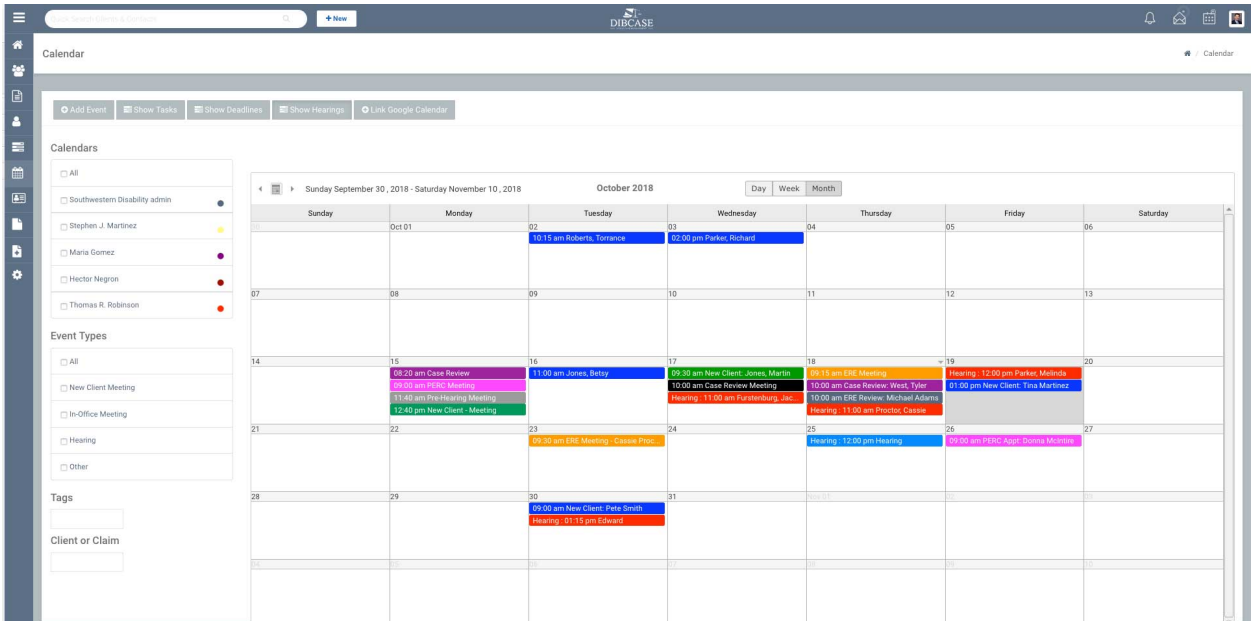
View	Details
Month (Default)	Shows all data for a given calendar month
Week	Shows all calendar events for the specific week
Day	Show all calendar events for the given day

Calendar Navigation



You can select the mini-calendar to navigate to prior or future months and specific days. You can also use the forward and backward selectors to move month by month.

Calendar Navigation



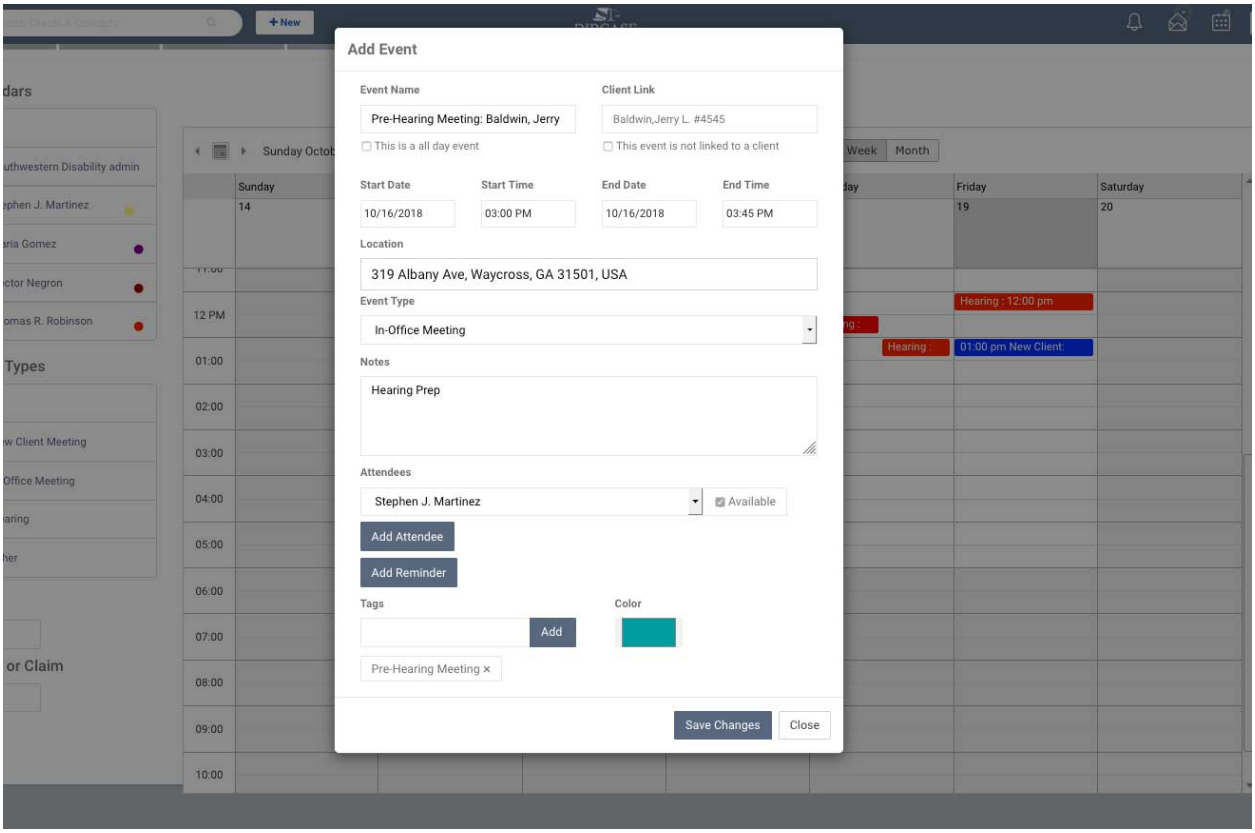
Calendar Filters

Filter	Details
Employee	Individual users can be selected an events filtered on that basis
Event Type	Events can be filtered based on event type
Tags	Appointments can be filtered by "tag"
Client or Claim	Appointment can be filtered to show a specific client

Creating New Appointments / Events

To create a new appointment, simply select a day in the month view, or a specific day and time on the "week" view, or a specific "time" on the "day" view.

If the intake is a new lead, you can indicate that "This event is not linked to a client" checkbox.



Changing An Existing Appointment

You may edit an existing appointment by double-clicking on it and manually changing the date, time, or other details. You can also click and drag an appointment to another day (Month View), another time (Week or Day View)

> Tip:
> When creating an appointment for a new lead, you will need to go back and edit the appointment to associate it with the new client if you accept the client.

Appointment Reminders

Appointment reminders are currently disabled as this functionality is available through the Google Calendar integration.

Note: Personal Appointments can be added to Dibcase and will push out to Google Calendar.

Google Calendar Integration

Google Calendar is a multi-platform, industry standard, easy to use and implement calendar solution. Dibcase can export data once the integration is established with Google.

We chose to implement a one way link so that only Dibcase appointments will export to Google and not vice versa. Non-Dibcase related Google Calendar events do not appear in Dibcase, by design.

Client Page

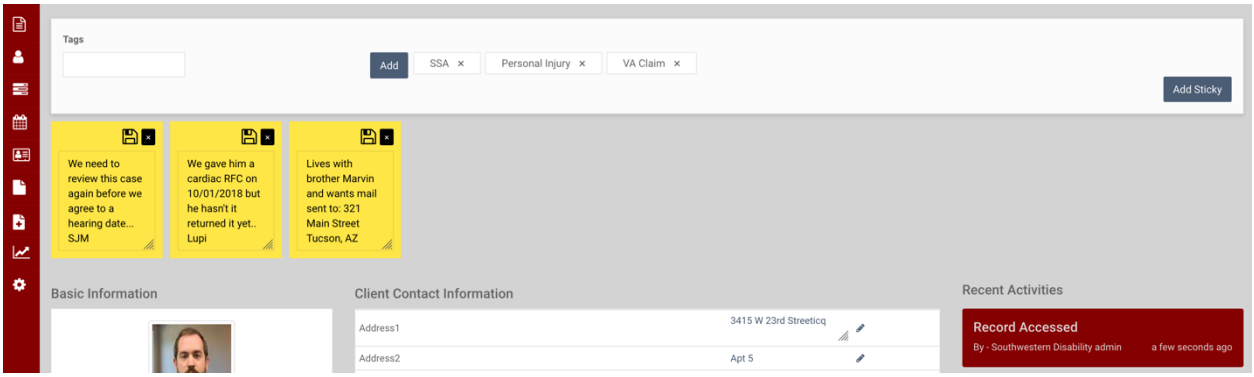
The "Client Page" is where you will access and edit all of the client's information.

Client Tags

You can have an unlimited number of tags that can be associated with a client. You can filter clients based on tag information on the "Client List Page".

Sticky Notes

Dibcase now includes an unlimited number of "Sticky Notes" to document short message at the top of the client page. Stick notes may be added by clicking the "Add Sticky" button on the right of the "Tags" bar.

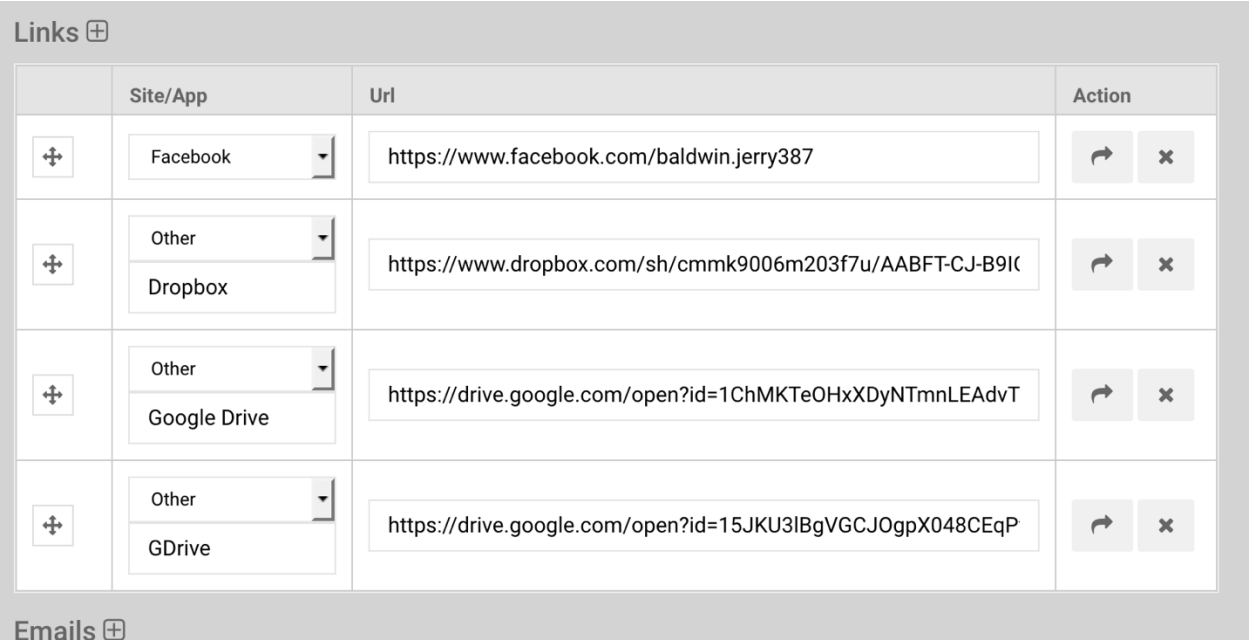


Client Status
Dibcase currently has 7 defined client statuses (ACTIVE, PROSPECT, LEAD, INACTIVE, DEFERRED, CLOSED, AND REJECTED LEAD)

Address Information
This is where you update the clients address information.

Links
Dibcase allows you to create an unlimited number of links to a client.

You may also use links to connect to a secure Dropbox or Google Drive folder.



Email Addresses
You can have an unlimited number of email addresses associated with a client, spouse, friend, caseworker, etc.

Phone Numbers
You can have an unlimited number of phone numbers associated with a client. Phone numbers can be "dragged" up or down to change whatever is considered the "preferred" contact number. Phone numbers that are no longer active can be marked "inactive" by checking the "inactive" box.

Recent Activity Feed
This box shows, in ascending order, the following:

Claim Added (SSA Only)

Client Created
Emails Sent
Notes Added
Documents Added
Appointments Created
Tasks Added
Tags Added and Deleted
Client Accessed
PII Tab Accessed

You can use the scrollbar to view older information

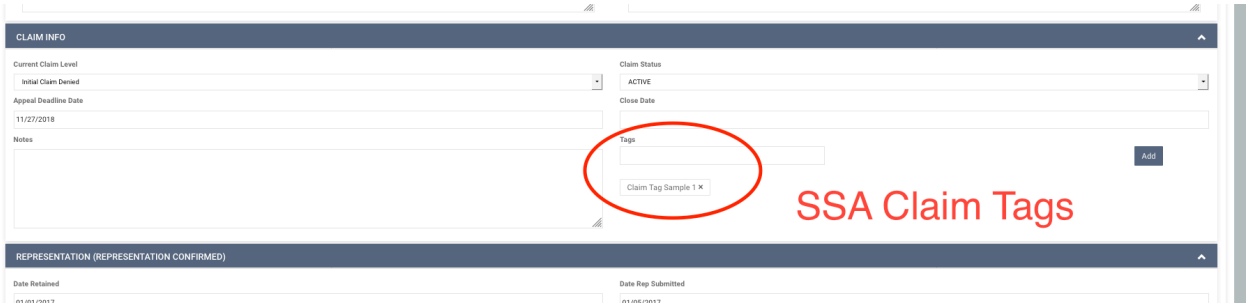
The activities include a timestamp and the name of the individual completing the action.

Claims Tab and Advanced Claims Tools

This tab shows all of the claims and custom fields groups that you've added to your claim.
You can add an unlimited number of claims of any type per client.

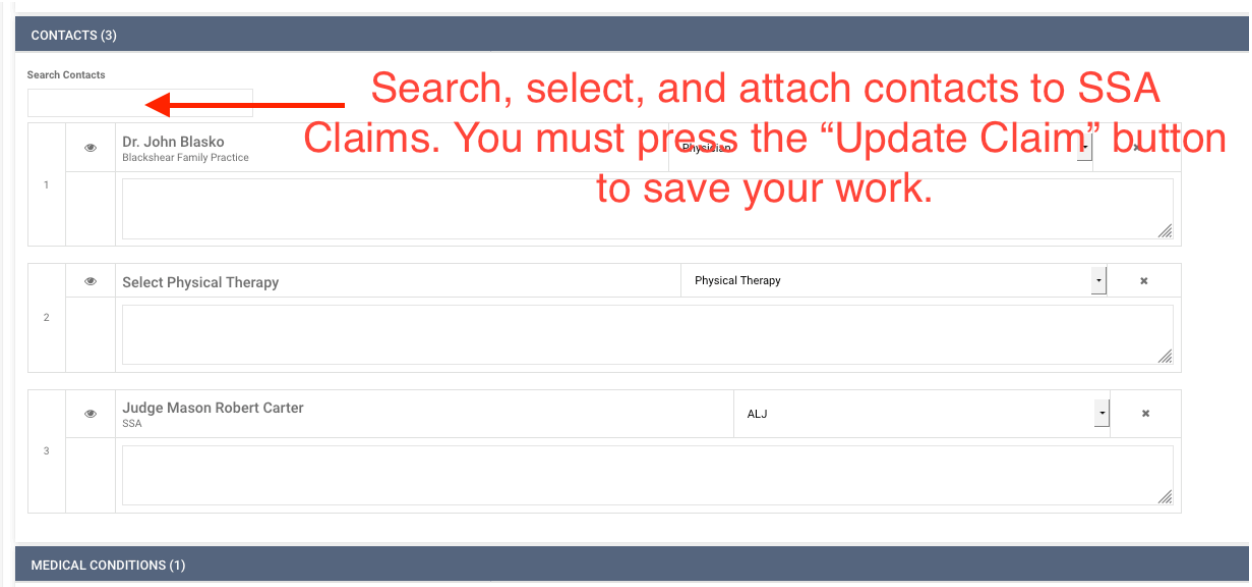
SSA Claims Tags

You can add claims tags in the SSA claims accordion marked "Claim Info". You can create as many tags as you need. These tags can be used to filter claims on the "Claims List" page.



Adding Contacts To Claims

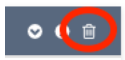
You can attach relevant contacts to SSA claims in the "Contacts" accordion of an SSA claim.
Attaching contacts to a claim is mandatory if you want to merge contact information into document templates.



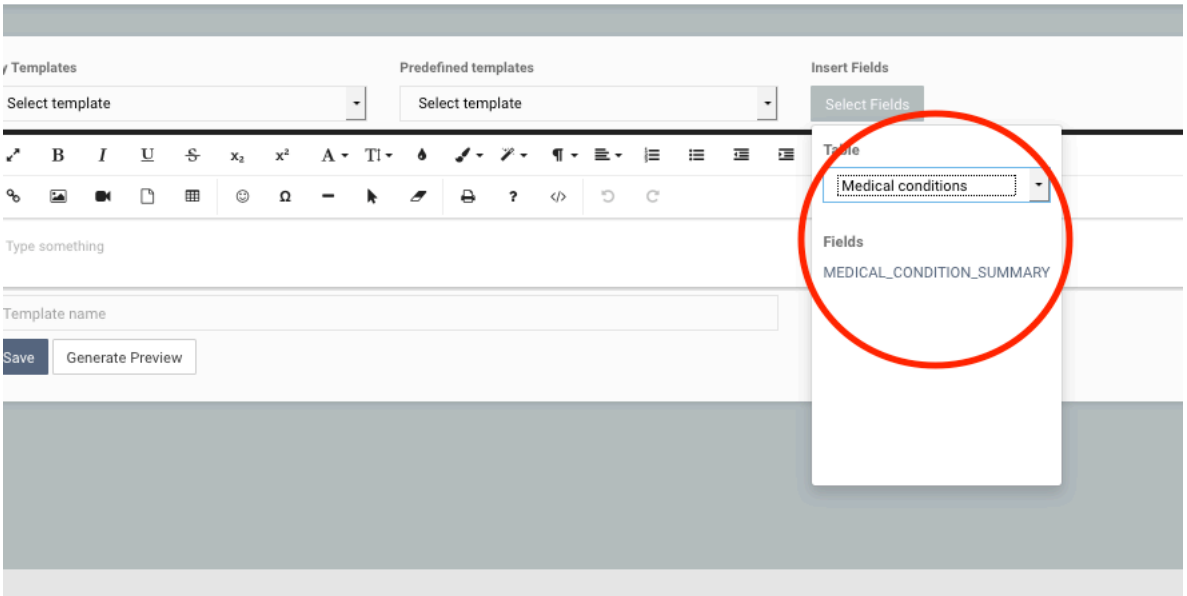
SSA Claims Contact Accordion

Adding Medical Conditions To A Claim

Dibcase has a "Medical Conditions" accordion that allows you to record an unlimited amount of medical conditions on SSA Claims.

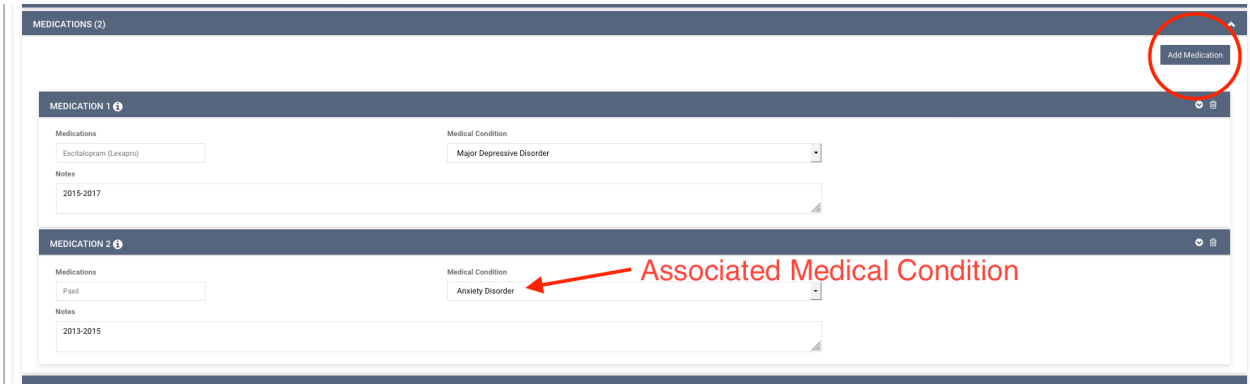
You can delete medical conditions by clicking on the delete icon  .

Tip: Medical conditions can be summarized and inserted/merged into documents and templates using the special field on the document templates called "MEDICATION_CONDITION_SUMMARY".



Adding Medications To A Claim

Dibcase allows you to add an unlimited number of the client's medications and details to an SSA claim. You can also choose from the client's conditions to associate the medication. If there is no associated medical condition, you can assign the medication to a symptom, for example.



PII Tab

This tab stores the client's "Personally Identifiable Information" which is required to identify your client when corresponding with an agency office. This is where you can correct information that may have been erroneously input during the intake or import process. You can also change a client's name, date of birth, etc.

Notes Tab

Notes are the heart of Dibcase. This is where your billable activities are tracked and recorded.
To Add Notes, simply type in a subject, body, and optional "Billable Hours" amount.

Development Notes

On the notes panel, there is a panel called "development notes" that allows you to create, edit, and print notes that are not shared with the client nor in the form of a document. You can use this a place to formulate your case strategy or store private notes on a client, claim, etc.

Editing Notes

To edit a note, simply click on the pencil icon and then save your edit when complete.

Billable Hours

In the notes section, you can see that total "Billable Hours" associated with a client

Exporting Notes

You can export notes in an excel spreadsheet format. This is useful because it will allow you to edit, total, or filter notes that may not be billable according to your current requirements.
You will need a program capable of reading .csv files to view and edit this information.

A1 | NOTE_DATE

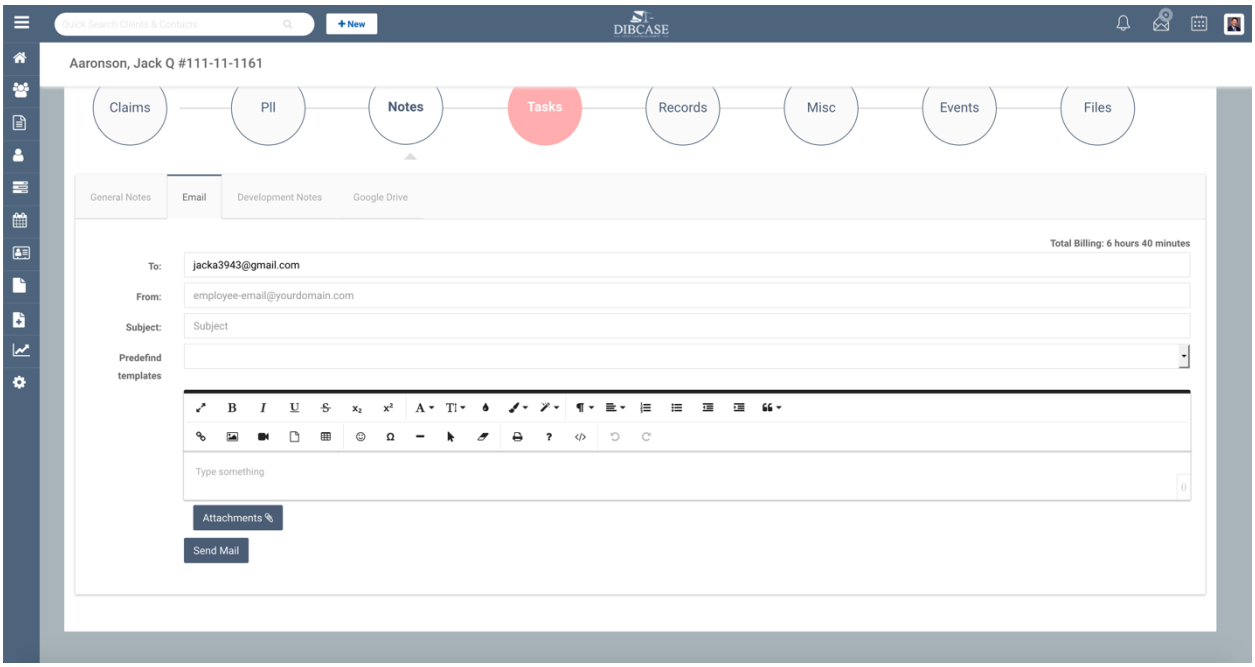
	A	B	C	D	E	F	G	H	I
1	NOTE_DATE	NOTE_SUBJECT	NOTE_TEXT	EMPLOYEE_NAME	BILLING_HO	BILLABLE_RA	BILLABLE_AN	NOTE_ID	NOTE_CLAIM
2	11/25/18 23:45	Appeal Filed - Reconsideration JEA 11/25/2018	Receipt: 944	Southwestern Disability admin	0.5	250	125	4334	
3	11/23/18 23:36	Expense Added - GA DOL Employment Records	2001-Presen	Southwestern Disability admin	0.5	250	125	4332	
4	11/23/18 23:21	Appeal Filing	Filed appeal	Southwestern Disability admin	0.75	250	187.5	4331	Veterans (VA) Claim 1 of 1
5	11/23/18 23:18	Incoming Call - Status Requet	Told him we	Southwestern Disability admin	0.25	250	62.5	4330	Baldwin,Jerry L. #4545 (SSA Claim 1 of 1)
6	11/14/18 18:46	Case Review	Reviewed br	Southwestern Disability admin	0	250	0	4191	Baldwin,Jerry L. #4545 (Claim 1 of 1)
7	11/14/18 18:08	Test	Test	Southwestern Disability admin	0	250	0	4186	Baldwin,Jerry L. #4545 (Claim 1 of 1)
8	11/14/18 18:06	Incoming Call - StatusRequest	Told him stil	Southwestern Disability admin	0.25	250	62.5	4185	
9	11/12/18 17:29	New Voucher	Test	Southwestern Disability admin	0.25	250	62.5	4125	Travel Voucher Claim 1 of 1
10	11/12/18 17:24	Test Note	Test	Southwestern Disability admin	0.25	250	62.5	4124	SSA Claim 1 of 1
11	11/12/18 17:19	Outgoing Call - Client	Test	Southwestern Disability admin	0.25	250	62.5	4122	
12	11/12/18 17:17	Incoming Call - Status	TEst	Southwestern Disability admin	0.25	250	62.5	4121	
13	11/5/18 3:54	Task Added	Test Task 2	Lupi Lopez	1	150	150	3899	
14	11/2/18 17:58	Incoming Call - Client	Status reque	Southwestern Disability admin	0.25	250	62.5	3871	
15	10/31/18 2:09	Case Review	10/30/2018	Southwestern Disability admin	0.75	250	187.5	3832	
16	10/29/18 7:17	Test Event	10/29/2018	Southwestern Disability admin	2	250	500	3765	
17	10/29/18 11:15	BALDJ4545 ADDRESS CHANGE TEMPLATE TO SSA -	Test Note	Southwestern Disability admin	1	250	250	3764	
18	10/29/18 11:13	BALDJ4545 CALL-IN LETTER BY SOUTHWESTERN DISABILITY AD		Southwestern Disability admin	0.5	250	125	3763	
19	10/27/18 12:50	BALDJ4545 FIRM - SSA MEDICAL REVIEW BY SOUT	Stephen J. M	Southwestern Disability admin	0.5	250	125	3757	
20	10/21/18 13:50	Task Added	Test Name	Southwestern Disability admin	1	250	250	3639	
21	10/20/18 19:07	VA Hearing: Baldwin	10/31/2018	Southwestern Disability admin	2	250	500	3638	
22	10/20/18 22:25	VA Status Check	Told him....	Southwestern Disability admin	0.25	250	62.5	3637	
23	10/18/18 14:06	Case Review	10/18/2018	Southwestern Disability admin	1	250	250	3579	
24	10/17/18 19:29	Task Added	Call Client	Lupi Lopez	1	150	150	3528	
25	10/17/18 19:29	Incoming Call - Client	Status Requ	Lupi Lopez	0.25	150	37.5	3527	
26	10/17/18 13:41	Task Added	Create Fee P	Southwestern Disability admin	1	250	250	3519	
27	10/5/18 19:38	Outgoing Document	Mailed lette	Southwestern Disability admin	0.25	250	62.5	3315	
28	10/5/18 19:36	INCOMING CALL	VERY UPSET	Southwestern Disability admin	0.25	250	62.5	3314	
29	10/5/18 18:37	INCOMING CALL - STATUS	STILL PENDI	Southwestern Disability admin	0.25	250	62.5	3309	
			<table border="0" width="100%">						

Exported notes show:

A. Timestamp of when the note was created
B. The user created "Subject"
C. The body of the note
D. The name of employee that created the note
E. The billable hours assigned to the event
F. The billable rate of the employee whom created the action
G. The calculate amount of E times F
H. Note ID
I. The (optional) claim associated with the action.

Emails

On this sub-tab you can compose and send emails to your clients from within Dibcase. You can access templates that will merge client and firm information directly into the email. You can send attachments to your clients. Once an email is sent, a note entry is automatically created displaying the email information that was sent. Emails are sent through your default email application.



Client Page Notes Tab Email

Email Notes

You must type in the "From:" email address when you compose an email. This was done allow you to have the flexibility to send emails from any valid email account you may have.

Tasks Tab

This tab shows all tasks associate with your client. Tasks can be edited here with full functionality. Tasks can also be edited from the Task List Page.

Records Tab

The record tab provides a convenient way of tracking client medical record requests. There is a specific process in Dibcase to creating and tracking medical record requests.

Option 1: Create Medical Record Requests Using Dibcase Templates

Steps	Details
Create List	Interview client and make list of relevant medical providers
Verify List	Verify that medical providers are listed in Dibcase contacts database

Add New Contacts	Add new contacts as necessary to Dibcase contacts database
Add Contacts To Claim	After verifying that all contacts are correctly represented in the Dibcase contacts database, add the appropriate contacts to the Social Security claim they are associated with.
Open Document Templates	Open document templates and select the appropriate medical record request template
Merge Claim and Contact Info	Once you've selected the appropriate document template, merge the client, claims, and contact data into the template

Option 2: Recording Manually Generated Medical Record Requests

Misc Tab

This Misc Tab

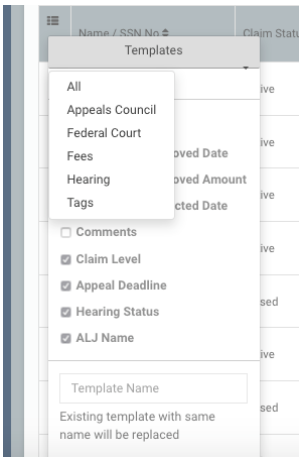
Events Tab

The Events tab shows SSA appeal deadlines, tasks, and appointments associated with the client.

Files Tab

The files tab shows all documents attached to the client, the Dropbox, and Google Drive folders.

Claims List Page



View Templates

Dibcase offers the ability to create custom views with groups of fields that you select. For example, you may want to create a view with hearing related fields and call that "Hearing" which will show ALJ name, hearing status, T2 and T16 Decision, etc. You may also want to create a custom view for A/C cases.

Once you've selected a group of fields that you would like to group together, you then open the view editor and save your group with a "Template Name" in the example illustration, you can see we've created custom views for the "Appeals Council, Federal Court, Fees, Hearing, and Tags"

Appeals

Because appeals are such an important part of the disability application process, Dibcase has a dedicated "Appeals" button on the claims list page. What this does is filters all of the claims and looks for claims with a date in the "Appeal Deadline" field. If you do not add an appeal deadline date when processing denials, the claim will not appear in the list. We have also added a dedicated automation called "Add SSA Denial" to help automate this important process. Once you've processed an appeal, you must delete the "Appeal Deadline Date" on the claim to remove it from this list.

Claims Tags

The table can be filtered based on custom claims tags that are set on SSA claims. These tags are set on the SSA claims accordion.

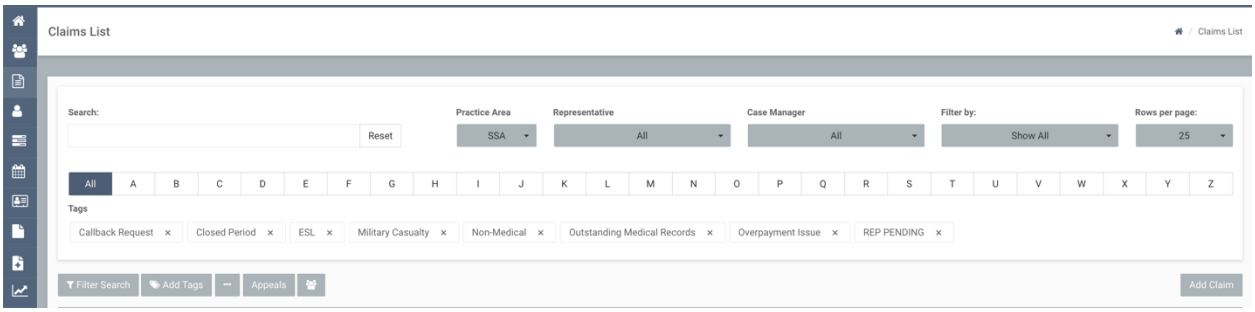
Deleting Claims (Admin Only)

From this panel you can delete duplicate SSA claims or claims that you need to delete for whatever reason.

Exporting Claims (Admin Only)

This powerful feature allows you to export all of your claims. You have the choice to export "Selected Claims" or exporting all of your claims data in the Excel .csv form for analysis.

Filtering Options



You can filter cases by primary representative, case manager, and claim status. You can also search using the search bar.

Search Box

The claims list page search bar filters for the following fields:

Client Last Name

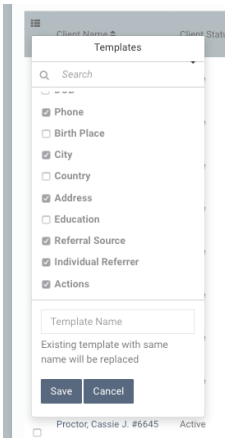
Claim Level
ALJ Name
Representation Status

Tags
You can filter cases by claim tags

Group Editing
You can select a group of claims, such as appeals, and select the group edit button. This will load the select cases and allow you to page through one by one and edit the selected claims.

Client List Page

View Templates



This feature allows you to create different "views" or groups of fields that would like to view together. For example, if you want to see the "Birth Place" column in the table, you can activate that field, otherwise, it will not appear in your default view. Also, you may activate all fields and simply pan to the right to see all client related fields.

Group Tagging
You can select a number of visible claims and apply tags to the group

Group Email
You can send a group email to a selected group of clients and use email templates. Clients are added as BCC in order to prevent clients from seeing other email address for privacy purposes.
Once a group email is sent, a copy of that email will be added to the notes feed of each affected client.

Deleting Clients (Admin Only)

This is the spot where clients can be deleted

Exporting Clients (Admin Only)

You can export clients by selecting the "Export Clients" option by clicking the "Import & Export Clients" button on the "Client List" page.

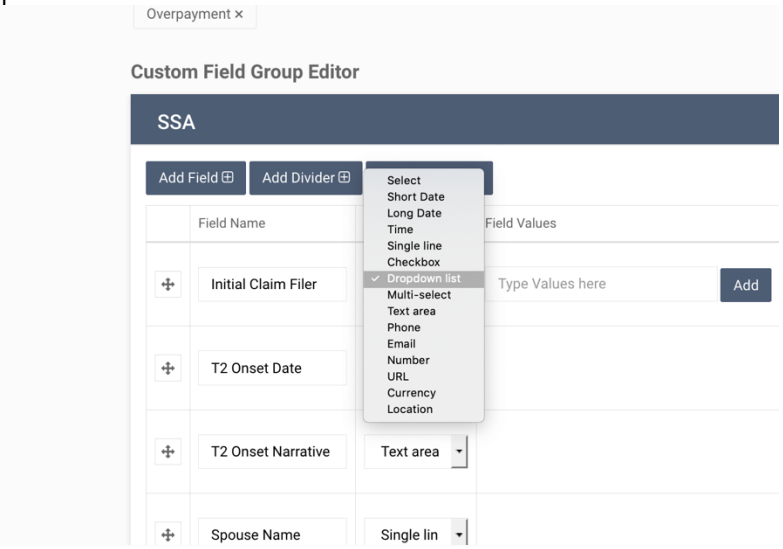
Custom Fields

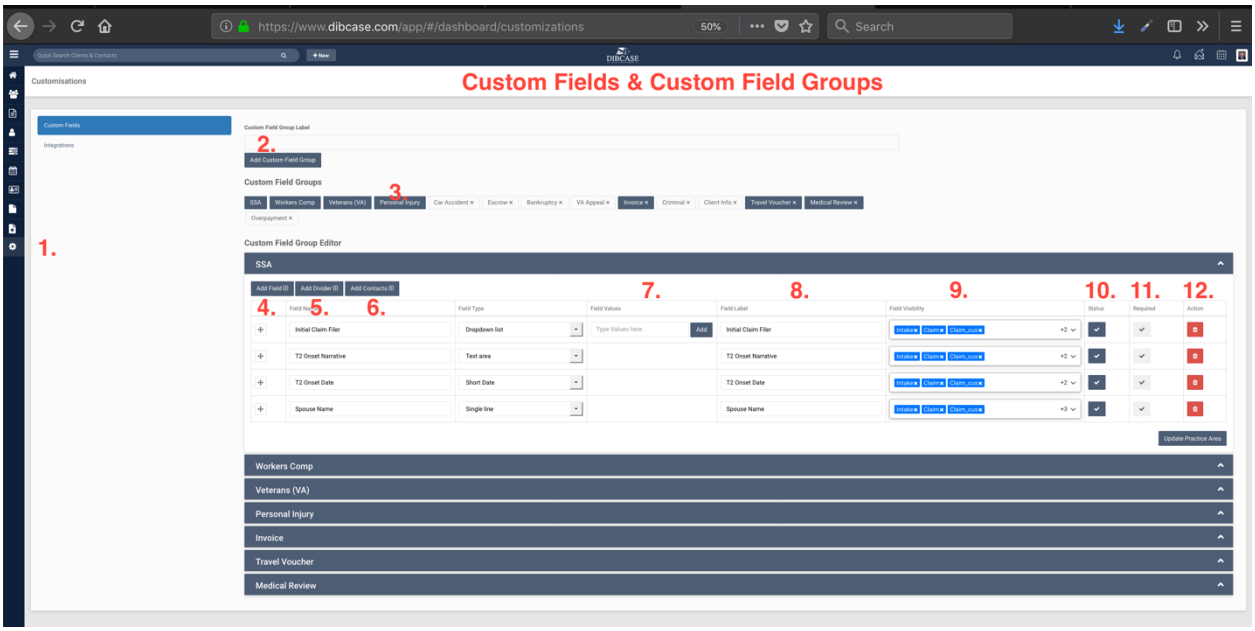
At Dibcase we understand that we can't possibly add every field that you might want or need to personalize your case management experience. That's why we've created the custom fields functionality.

Custom Field Types

It includes the following fields types:

Short Date
Long Date (Pending)
Single Line
Checkbox (Pending)
Dropdown List
Multi-Select
Text area
Phone
Email
Number
URL
Currency
Location





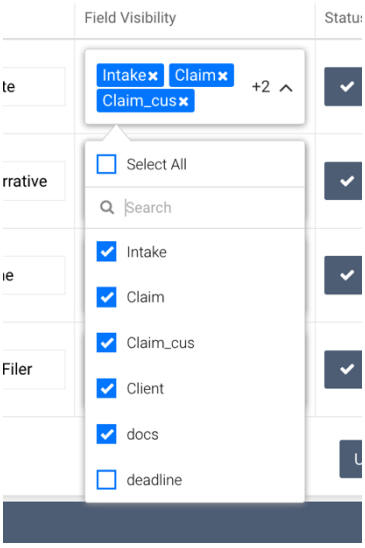
Setting Up Custom Fields

Step	Details
1	Click on the "Customizations" Icon
2	Select the "Practice Area" or "Custom Field Group" you want to modify
3	If the "Practice Area" or "Custom Field Group" does not exist, you can create it by entering a name for your custom field group and clicking "Add Custom Field Group"
4	Enable your "Custom Field Group" by clicking on it, if necessary
5	Click #4 Add Field
6	Create a Field Name
7	Select the type of field you need
8	Add a label for your field
9	Indicate where you field should appear in the application
10	Toggle the field on or off
11	Determine whether the field should be "required"
12	Click the "Update Practice Area" button

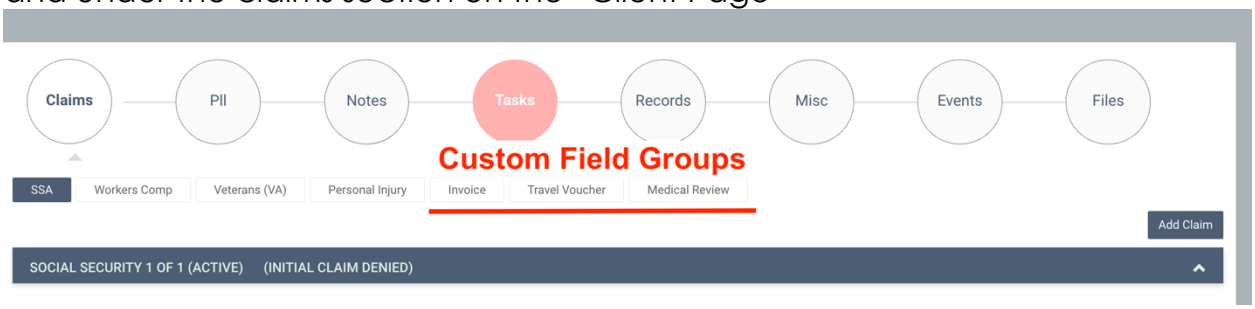
Custom Field Group Visibility Options

Field Visibility	Details
Intake	Will appear as a custom field when using the "Client Intake" popup

Claim	*Pending*
Claim_cus	Will appear under the claim in the "Custom Fields" accordion
Client	*Pending*
Docs	Will be available when constructing document templates
Deadline	Will appear on the Dashboard in the "Deadlines" panel



Once created, "Custom Field Groups" will appear on the Client Intake screen and under the claims section on the "Client Page"



Contacts List Page

The contacts list page offers some basic filtering options including search by name, employer, and by tag. The columns are sortable ascending and descending.

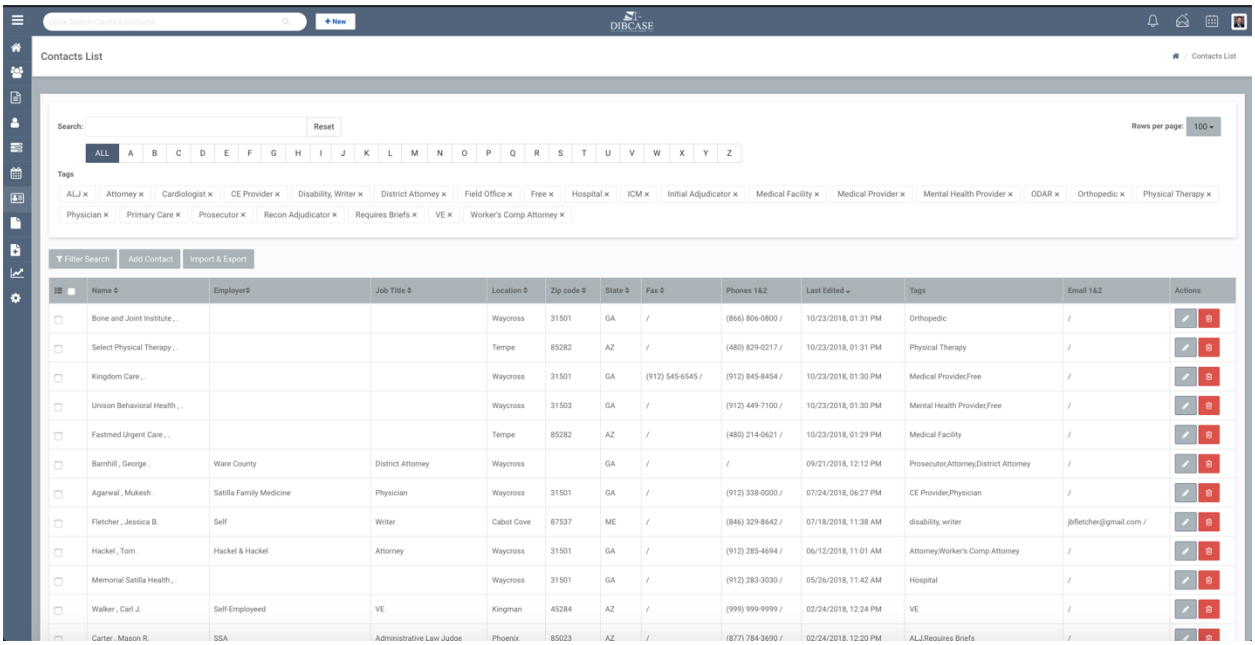
Adding New Contacts

Complete the fields on the "Add Contact" popup by completing the required fields. The only required field is the "Last Name \ Company Name" field. There are spaces for two emails, two phone numbers with extensions, and two fax numbers. You can also apply tags to contacts to aid in searching. The contacts module is essentially a rolodex for names and addresses for contacts.

Tip #1: If there are important contacts that you interact with frequently, you can add them as clients and label them as "Prospects" this will allow you to use the full Dibcase toolset and record notes, assign tasks, etc.

Tip #2: After a client no longer has any active claims, you can assign them as prospects and apply tags like "mailing list" to continue to interact with your client. You will continue to have full access to the client should the need arise to create another matter such as a cessation.

Sorting Contacts by Tags

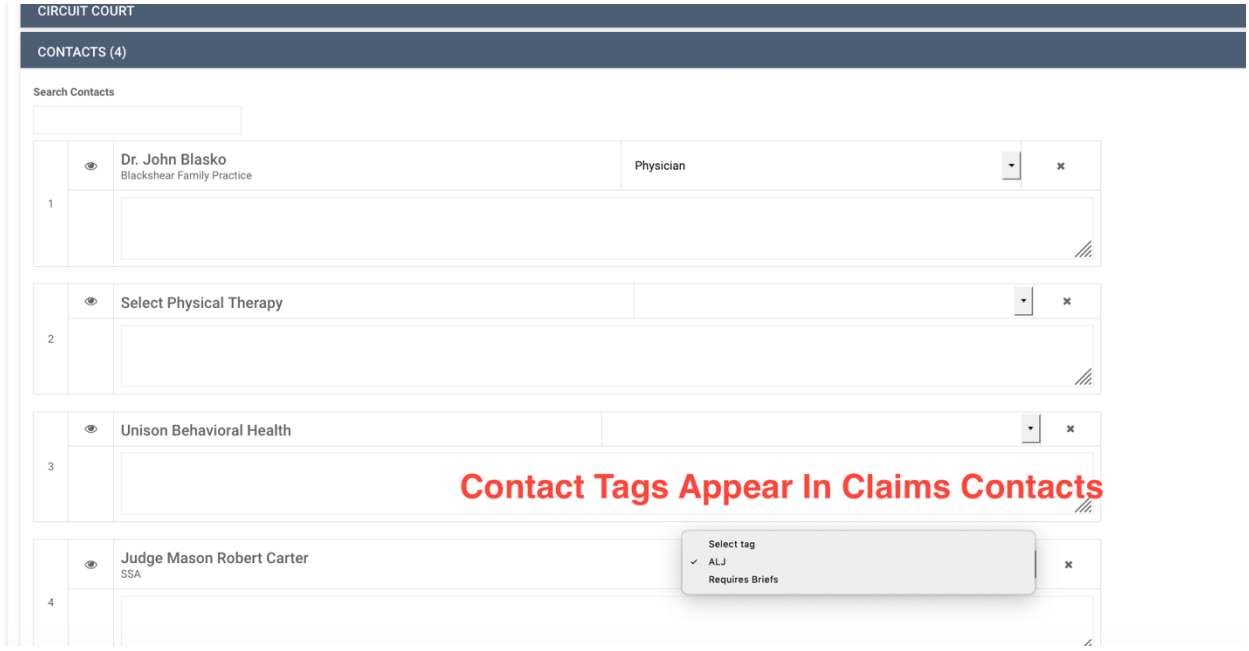


Tags can applied to contacts to make it easier to find groups of related contacts. You can add as many different tags to contacts as you need.

In addition, those tags appear in the Contacts Accordion of SSA claims

Deleting Contacts

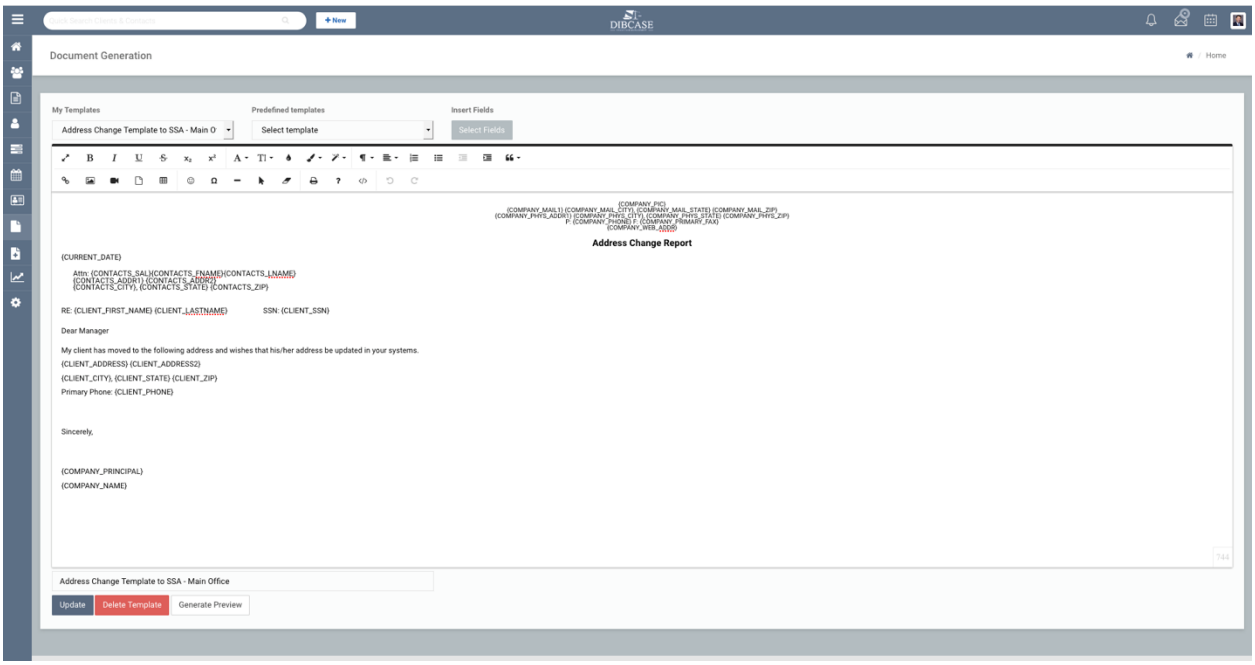
Contacts can be deleted on the Contacts List Page by pressing the red delete button to the right of the list.



Document Generation

Dibcase uses a "text editor" which is essentially an internal "word processor" to create, edit, save, print, and export documents. This text editor affords you a great many tools to create complex documents including images, tables, and other advanced features. With a "word processor" type interface, you can experiment with the look and feel of documents and customize them as needed.

Document Editing Toolbar



Dibcase Document Editing Interface

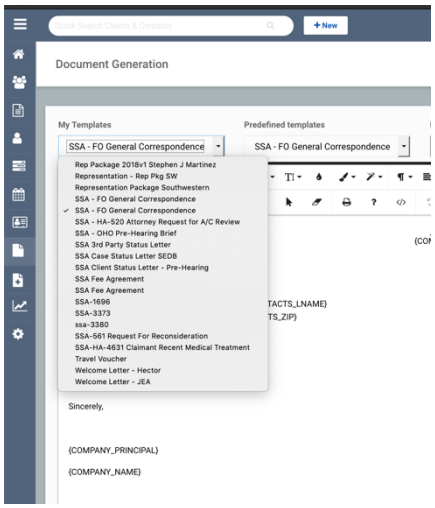
For more information on "Advanced" document editing, refer to the Supplemental Section in this manual.

Document Templates

Document templates allow you to create an unlimited number of documents and email templates that you can merge client, contact, and claims information into.

Pre-Defined Templates

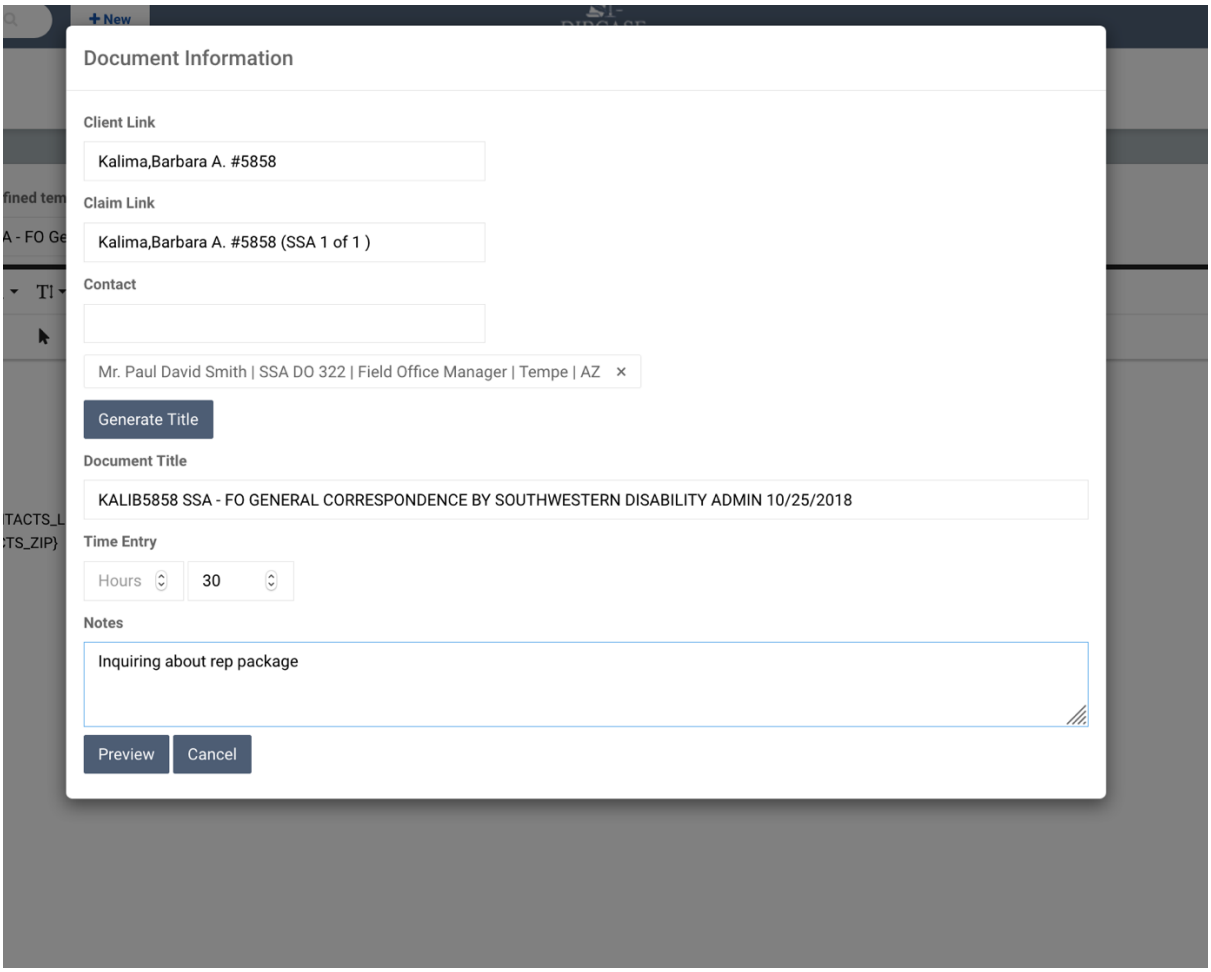
Dibcase includes many pre-made templates that you may use to edit and customize your own document templates. Once you load a Pre-Defined Template and save it, it will appear in your "My Templates" dropdown list.



My Templates

Once you've create a template and "save" it, it will appear in your "My Templates" list. These documents can be edited and renamed as desired.

Generating Document Previews



Attaching Documents to Clients and Claims

Once you selected the document template that you would like to use, the next step is to select the client and claim you would like to attach the document to.

Steps	Instructions
1	Select the template you would like to use to generate your documents
2	Select "Generate Preview"
3	Select client to associate document with

4	Select claim to associate document with (optional)
5	Select contact(s) to merge contact data into document (optional)
6	Press "Generate Title" button to let Dibcase create your title (editable)
7	Select a time entry
8	Add any notes you'd like to associate with the document

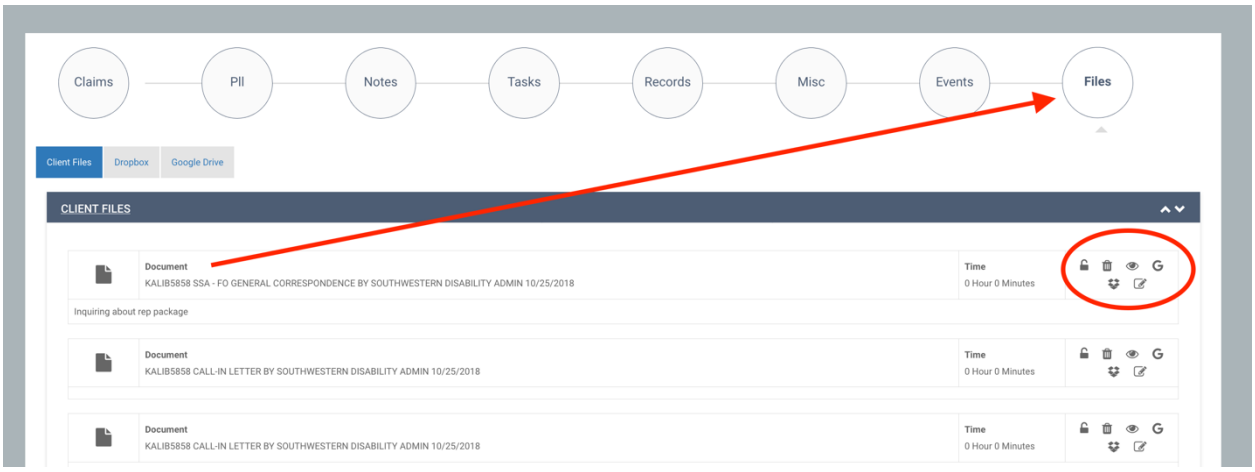
Tip: You can associate multiple contacts with a document

Viewing The Document You Created and Attached To A Claim

Steps	Instructions
1	Go to the clients page that you created the document for
2	Navigate to the claim you attached the document to
3	Select the "Documents" accordion and your document should appear in the list
4	Select claim to associate document with (optional)
5	Select contact(s) to merge contact data into document (optional)
6	Press "Generate Title" button to let Dibcase create your title (editable)
7	Select a time entry
8	Add any notes you'd like to associate with the document

Viewing the Document You Created and Attached To A Client

Sometimes, you will want to send a document to a client whom does not have a claim. In this case, you can attach documents to the "client". To view those documents, you navigate to the client's page and select the "files" tab and all of the documents that you created for that client should appear in the list.



Viewing and Editing Your Document

Using the document editing tools you can:

Icon	Function
	Lock a document to prevent further editing
	Delete a document
	Edit the document in a popup window
	Save the document to Google Drive (Integration Required)
	Save the document to Dropbox (Integration Required)
	Edit the document in a new floating window

Documents can be edited in the WYSIWYG interface. Dibcase uses the Froala insert and if you'd like more information about what the editor can do, visit www. Froala.com.

The Document Editor

The document editor has buttons that allow you to insert images, change fonts, font-size, paste information, etc.

Once you've made edits to your document, you can save the results, print, export, etc.

> Tip
>
> Before editing a document in a new window , be sure to use the button to make sure the correct information is merged into your document and saved.

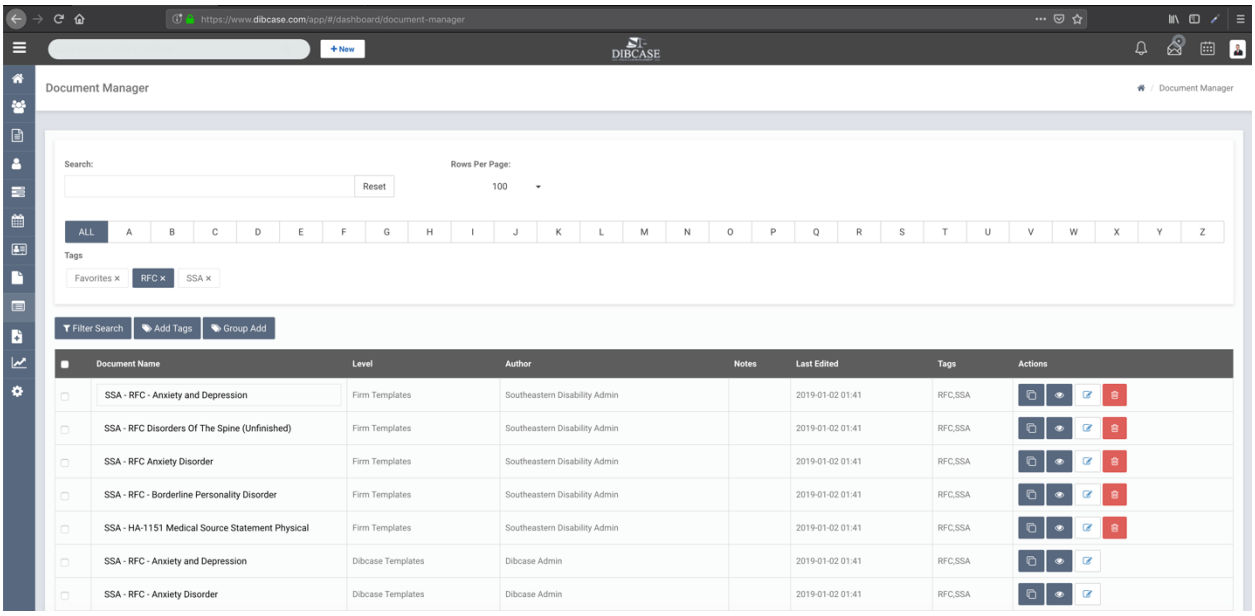
For Advanced Document Editing, see the supplemental section at the end of this manual.

The Document Manager (New 01/2019)

The document manager gives you a dedicated interface for viewing all of your document templates. With the search box, you can search through your templates by name. You can also apply tags to documents for easy access. For example, you can apply a "favorites" tag to your most often used templates. You can apply tags to groups of documents.

You can also select several documents and using the "Group Add" button, add the selected documents to a client and claim.

You can also duplicate and rename document templates and select them for editing.



Tip: Documents can be tagged by practice area such as SSA or VA. You can group several documents together for different scenarios with different fee agreements, etc.

Records Module

The records module is laid out in a spreadsheet style format and allows direct entry of data into the cells.

The records module is populated with records consolidated from the records tab of individual clients. In order to appear in this module, a records request must be create on the "Client Page".

When a case is completed and the records are no longer current, their status can be changed to "Archived" and filtered out of the general view.

Requesting Medical Records

Step	Details
Attach Contact	From the client page attach the contact to the claim
Add Records	From the client page records tab, select the contacts for which you would like to request records from
Generate Requests	From the document template page, create the medical record requests and attach them to the claim

Send Requests	From the client claims document tab, print and send the requests
Manage Requests	Requests can be update from the client records tab page

Reports

Due to the hundreds of fields and variables in Dibcase, we offer maximum flexibility by allowing you to export your client, claims, tasks, and records tables for external analysis in .csv format.

Client Reports

You can export the entire client table and analyze new clients, referral sources, demographic data, and any other pertinent information contained in the clients table.

Claims Reports

You can export the entire claims table – including custom fields and analyze approvals, denials, fees, win/loss by judge, etc. This information can be exported in .csv format and analyzed in Excel for maximum flexibility. Fee data is included in the claims export.

Charts and Graphs (Firm Admin Only)

Dibcase includes several charts and graphs. Currently the following charts are available to firm admins.

Chart	Details
Billable Hours	Bar Chart showing billable hours generated by all firm users – including firm admin. Selectable based on "Today, This Week, This Month, YTD"
Revenue Per Representative	All fees generated by primary representatives. Selectable based on "Today, This Week, This Month, YTD"
Revenue Per Case Manager	All fees generated by your firms, case manager(s), if applicable. Selectable based on "Today, This Week, This Month, YTD"
SSA Active Case Distribution	Chart shows all "Active" SSA cases based on case level
New Client Referral Sources	Chart shows referral sources for new clients. Selectable based on "Today, This Week, This Month, YTD"

Storage

Dropbox

The Dropbox integration can be enabled on the sidebar menu under the "Customizations" menu.

The path Dibcase uses to create new user folders is /apps/Dibcase/clients/

Google Drive

Google Drive integration requires that you establish a Google Drive account and you have the proper authorization to link Dibcase to your Google Drive account.

Once a Google Drive integration has been established and is active, Dibcase will automatically create a new folder in Google Drive when an intake is completed.

The path Dibcase uses to create new user folders is /apps/Dibcase/clients/

Tasks

There are several places in Dibcase that you can view tasks.

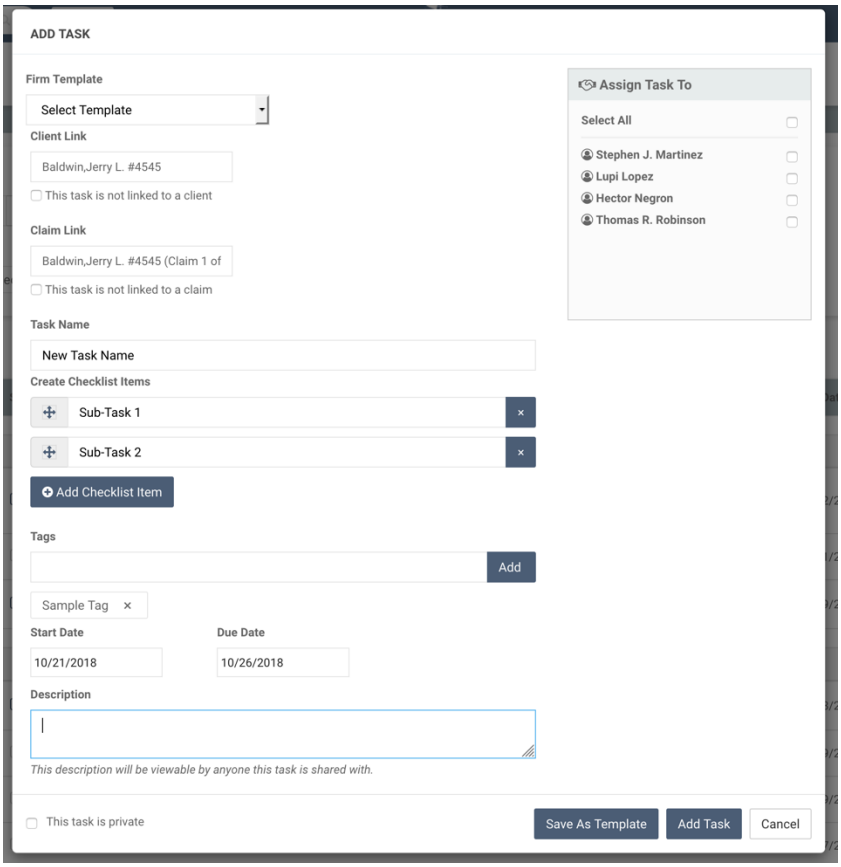
The "Dashboard Task Panel" Shows tasks that are due "Today, This Week, This Month, and Past Due". It shows all non-private tasks assigned to all users.

The "Task List Page" is another place where you can see a list of tasks and offers filtering options. Filter options include:

1. Tasks assigned "All" or specific employees

Creating Tasks

Tasks can be created from the "Task List Page" or from the Quick Menu.



Once you've completed the necessary fields on the "Add Task" popup, if the task is associated with a client, the task will appear on the client's page on the "Tasks" Tab. Otherwise, non-client related tasks will only be visible on the "Task List" page.

Note: By checking the box "This task is not linked to a client" and "This task is not linked to a claim", you are not required to associate a task with a client or a claim.

Tasks can only be associated with "SSA Claims" at this time.

Tasks must be assigned to at least one employee

Sub-Tasks

In Dibcase you can create an unlimited number of sub-tasks. Once the tasks is saved and associated with a client, the Task Tab on the client page is the most comprehensive place to edit and comment on tasks. Subtasks can be reordered, deleted, and completed. When a sub-task is completed, Dibcase will show the name of the employee that completed it along with a timestamp.

Editing Tasks

Tasks can be edited from two places – the Task List Page and the Client Page. The best place to edit tasks, however, is the Client Page. On the Client Page you can assign, re-assign, create additional sub-tasks, complete subtasks, add comments, change due dates, and change all task parameters.

Task Templates

If you create a task and group of sub-tasks that you will want to reuse, you can save it as a "Task Template". You can create an unlimited number of task templates, according to your needs.

Task Reminders

Task reminders are pending implementation

Viewing Tasks

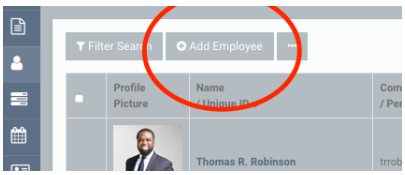
Tasks can be viewed from the Dashboard Panel, The Client Page, and The Task List Page.

User Management (Admin Only)

The firm admin has full access to all features and functions of Dibcase.

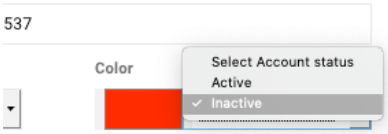
Adding Employees

Adding employees is done through employee menu. Simply press the Add Employee button to enage a popup screen where you can input the employee's information. Once you've properly configure the screen, you can give your employee the password that you generated for them to be able to login to Dibcase



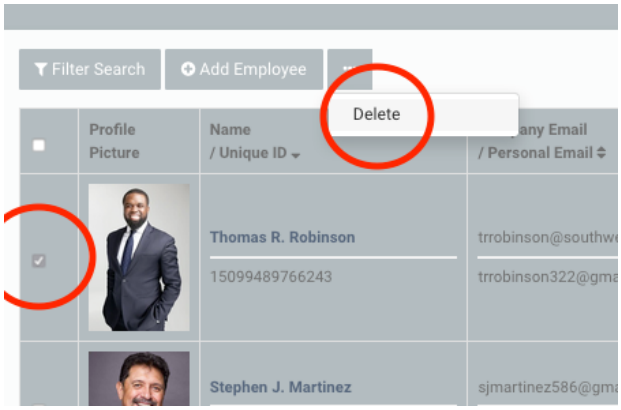
Managing Employees

To disable an employee account, you simply change their account status to "Inactive" from the employee screen.



Deleting An Employee

To delete an employee, you simply check the box next to their profile and press the "Delete" button located on the employee menu.

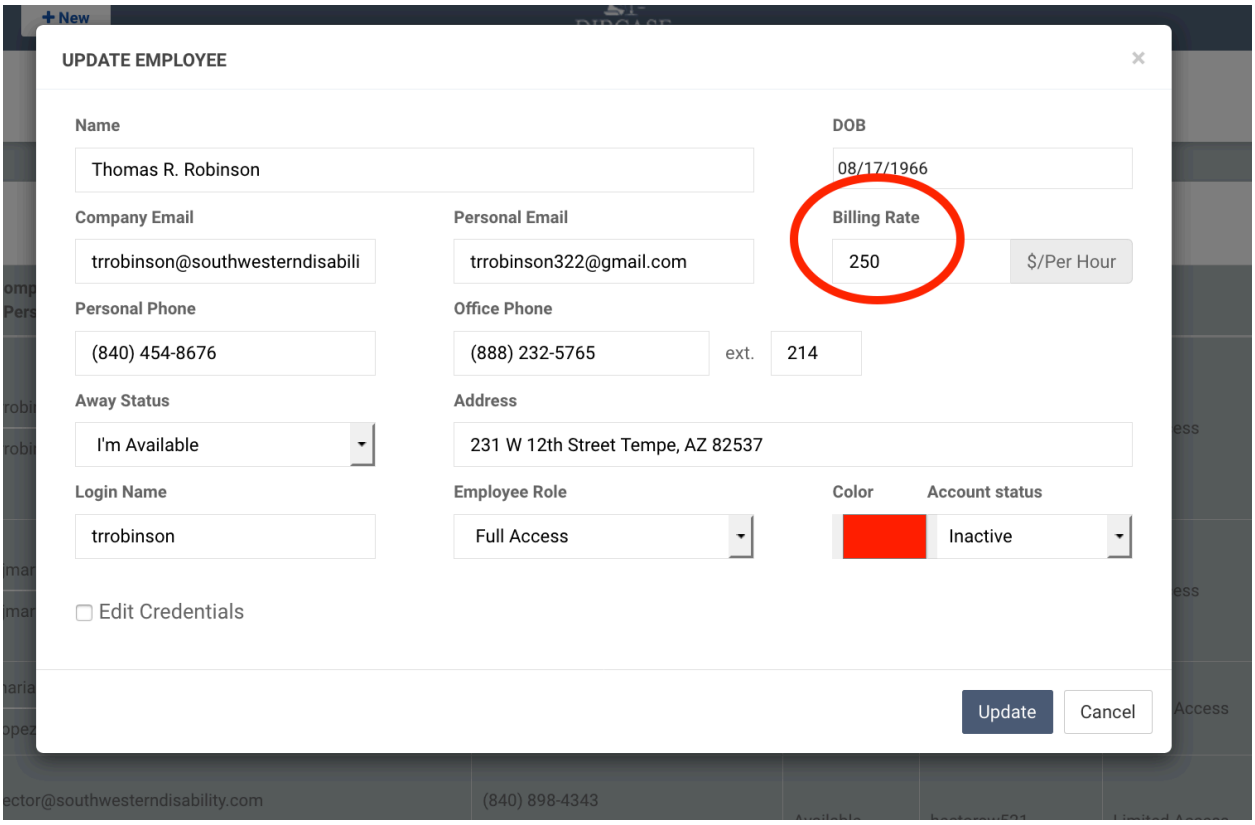


Caution – Deleting an employee is permanent and cannot be undone. If you are not sure whether deleting an employee is appropriate, inactive their account. Inactivating their account will prevent them from accessing Dibcase.

Disabling the employee presence This will remove their name from the Dashboard "EMPLOYEES" panel.

indicator

Setting Employee Default Billing Rate



User Access Privileges Chart

Function	Limited Access	Full Access	Firm Admin
Change Firm Settings	No	No	Yes
Add, Suspend, Delete, Edit Employees	No	No	Yes
Delete Clients & Claims	No	Yes	Yes
Access Fees & Awards	No	No	Yes
Customizations and Integrations	No	No	Yes
Export Clients	No	No	Yes
Export Claims	No	Yes	Yes

Delete Appointments	Yes	Yes	Yes
Delete Contacts	No	Yes	Yes
Create and Edit Firm Document Templates	No	No	Yes
Delete Documents	No	Yes	Yes
Delete Notes	No	Yes	Yes
Delete Tasks	Yes	Yes	Yes

Firm Settings Supplement (Admin Only)

Permanently Deleting Your Account (Firm Admin Only)

If you decide to close your Dibcase account, make sure to export your client and claims data before deleting your account.
If you decide to permanently delete your account, you are responsible for any lost data. Therefore, make sure to properly export your data before deleting your account.

My Profile

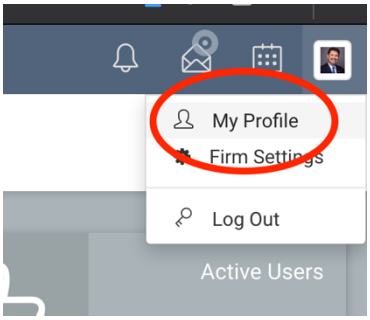


Figure My Profile

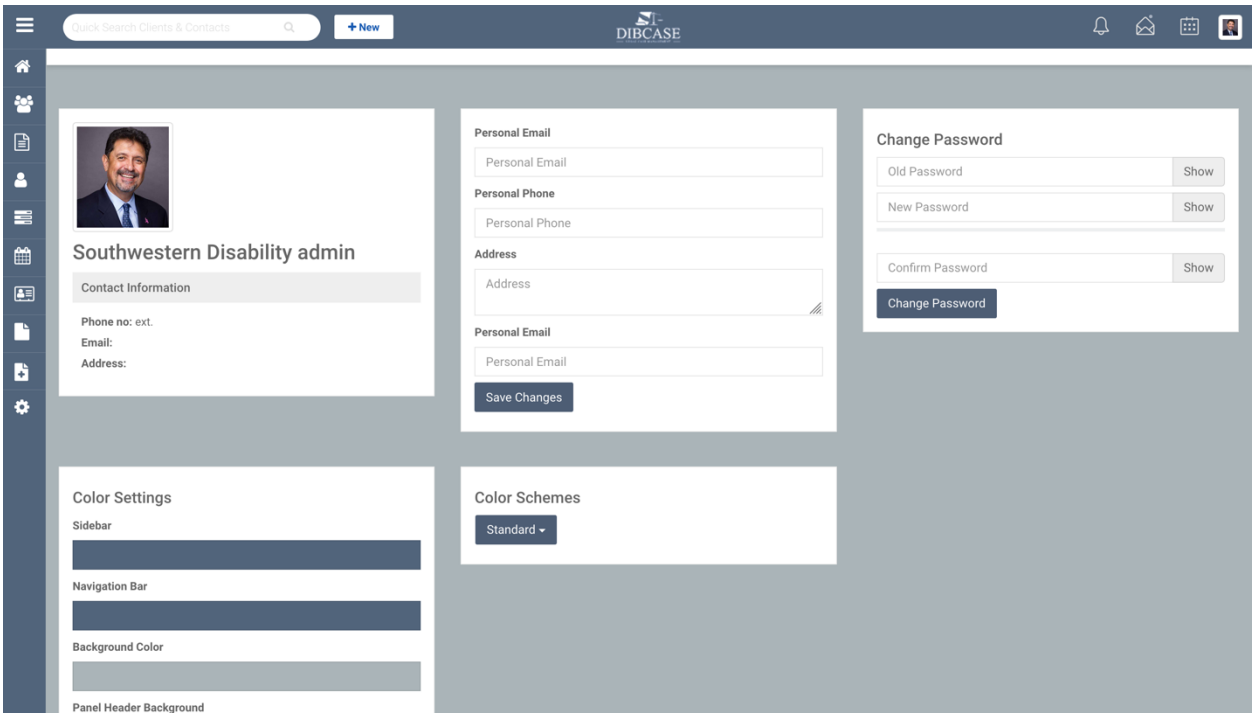
Change Your Email, Contact Information, Picture, and Password

On the "My Profile" page, you can change your picture, email, contact information, reset your password and change your Color Profile.

To change your employee picture, simply click in the box and upload a new picture or drag a picture into the box.

Color Settings

You can create and save color schemes for easy recall.

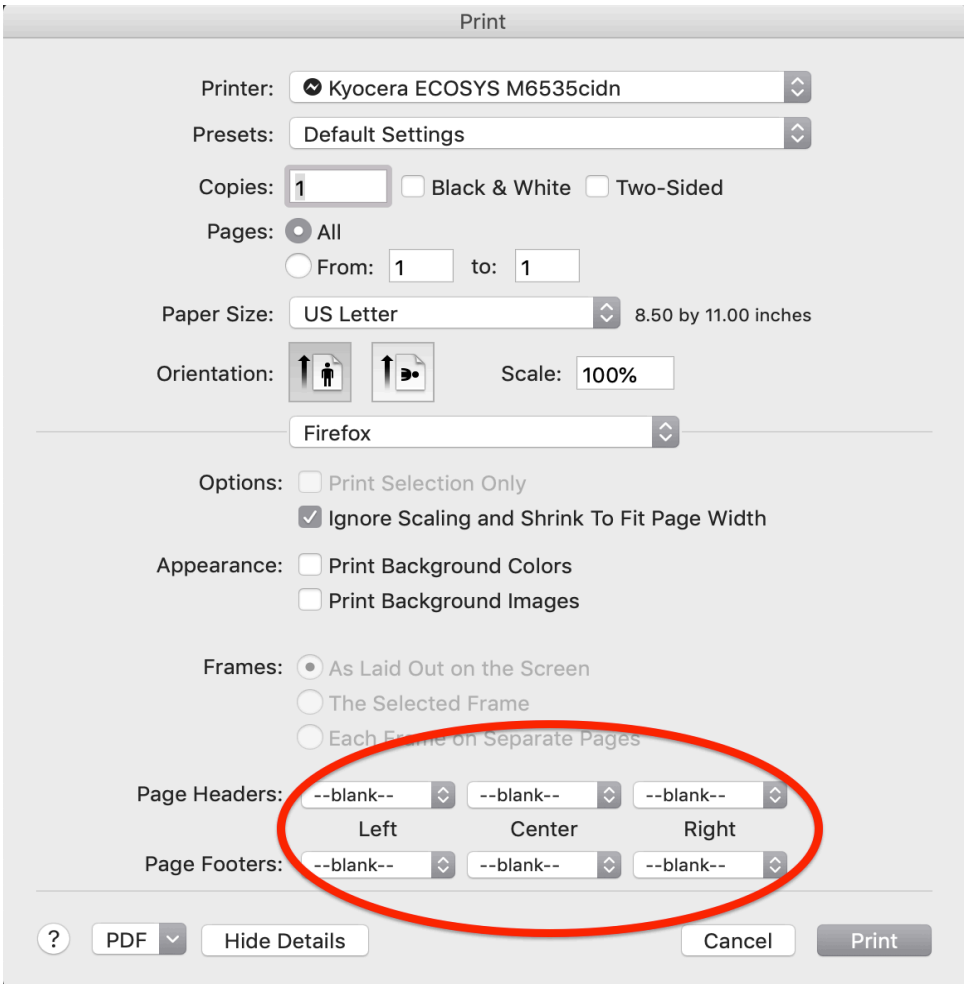


My Profile Page

Supplemental Information

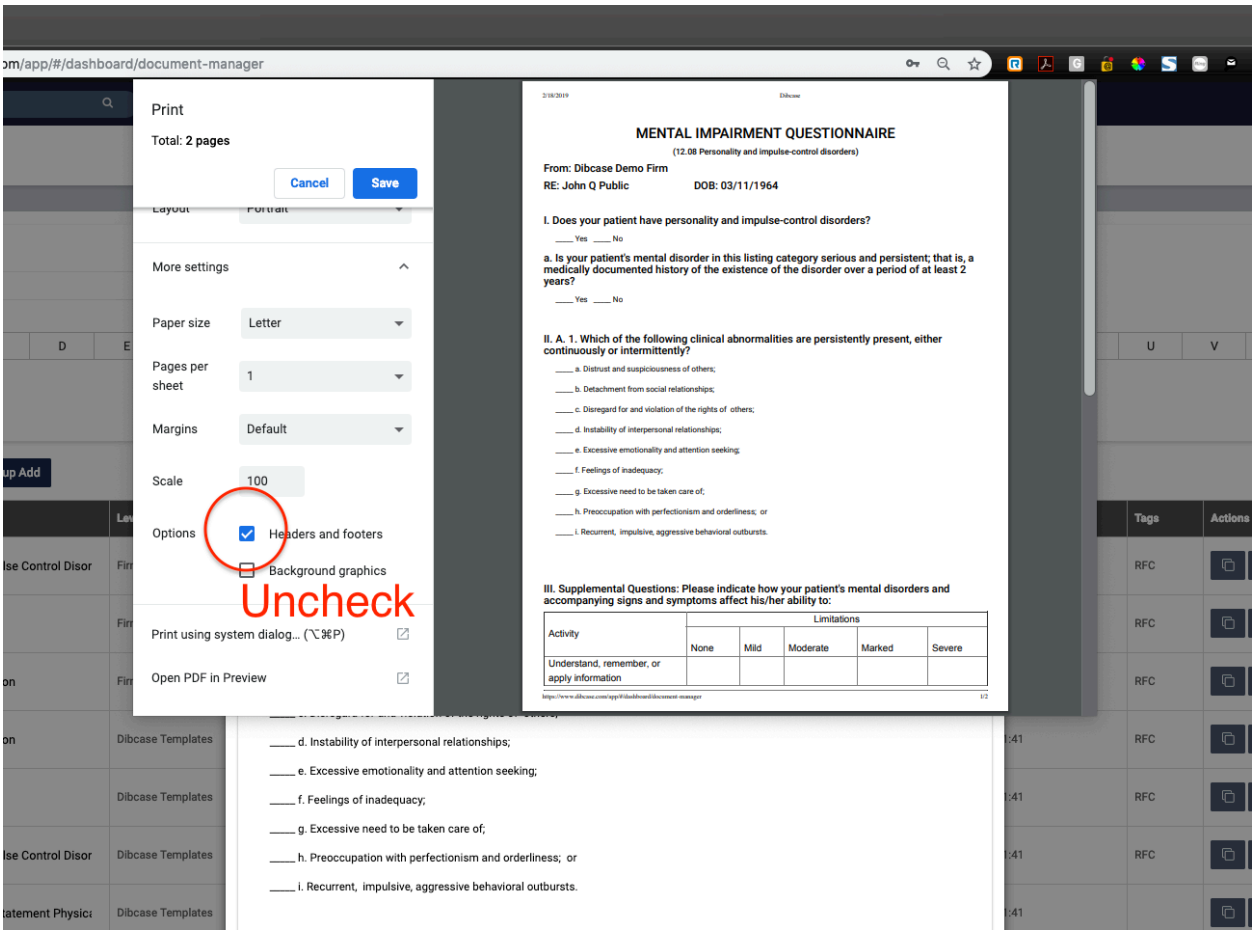
Disabling headers and footers using the Mozilla Firefox Browser

In Firefox, when you print with your browser, make sure the.



This will remove the header and footer information when you print.

Disabling Footers and Headers in Google Chrome Browser



Advanced Document Editing (Advanced Users Only)

Dibcase offers advanced editing features in the "code" view, which should only be used by advanced users.

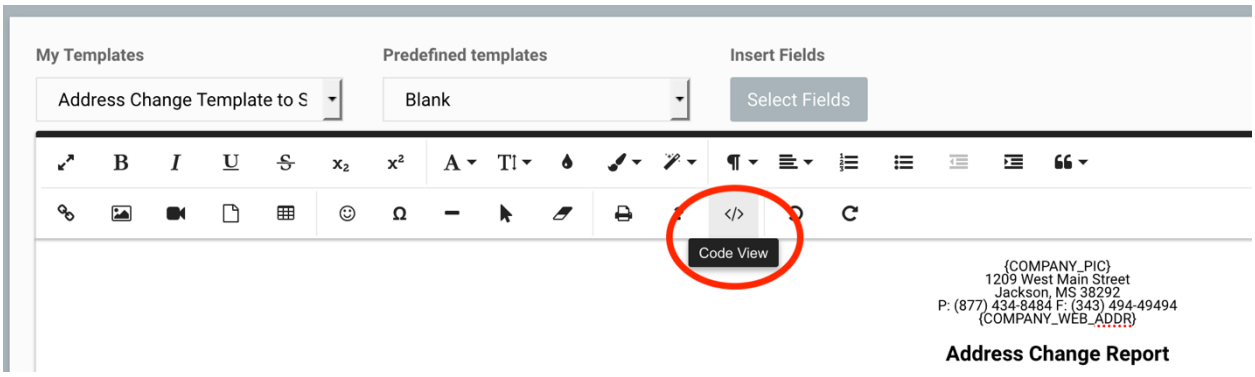


Figure 1 Dibcase Document Editing Interface

Tip: Use the Pre-defined template called "blank" for experimentation purposes.

Note: The Dibcase Pre-defined templates cannot be edited or altered by users. Therefore, you can experiment with them and delete them as necessary.

HTML Editing

Dibcase offers advanced editing features in the "code" view, for advanced users

CSS – Cascading Style Sheets

Page Breaks

Page breaks can be forced by placing the following code snippet into your templates where you need a page break.
Code Snippet

```
<div style="page-break-after: always;"><span style="display:
none;"> </span></div>
```

Checkbox Functionality

To permanently change whether a checkbox is enabled in Dibcase, use the following code

Code Snippet #1 represents "Unchecked" checkbox

```
<input value="on" type="checkbox">
```

Code Snippet #2 represents "Checked" checkbox by adding the "checked=true" value

```
<input checked= "true" value="on" type="checkbox">
```

Paragraph Spacing

Using CSS, you can manually edit the paragraph spacing in Dibcase documents.

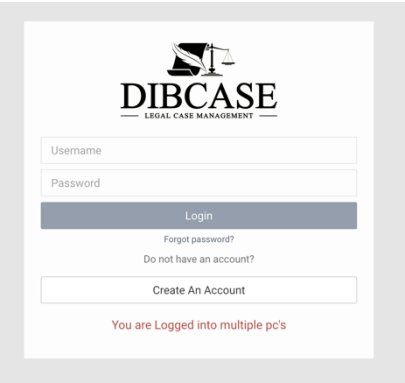
Code Snippet

```
<div style="text-align: center; line-height: 13px;">{COMPANY_PIC}
        <br>{COMPANY_MAIL1} {COMPANY_MAIL_CITY},
{COMPANY_MAIL_STATE} {COMPANY_MAIL_ZIP}
```

```
        <br>{COMPANY_PHYS_ADDR1} {COMPANY_PHYS_CITY},
{COMPANY_PHYS_STATE} {COMPANY_PHYS_ZIP}
        <br>P: {COMPANY_PHONE} F: {COMPANY_PRIMARY_FAX}
        <br>{COMPANY_WEB_ADDR}
        <br>
        <br>
</div>
```

Troubleshooting

You are logged into multiple PC's



If you receive a message that says, "You are logged into multiple PC's" and logged out of Dibcase, you will need to clear the cookies from your browser and log in again.

Note: Dibcase only allows you to be logged into one account on one computer at a time for security purposes.

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