

DID YOU KNOW?

Uploading & Renaming Documents

Attachments uploaded into TWIST are viewable on the **Case Records/Documents** progress bar.

For **Request** and **Agency Cases**, you can access **Case Records/Documents** progress bar by selecting a case from your **Case Listing**. When you select the **Case Records/Documents** progress bar, you will see **Case Records/Documents** and **Case Pictures**.

For **Provide Cases**, you can access the **Case Records/Documents** progress bar by selecting a **Household** from the **Household Listings**. Select **Provide** from the TWIST menu, then select **Household Listing** from the progress bar. Once the **Household** is selected, click on **Edit/View**. Select the **Household Management** progress bar and select the case.

The **Case Records/Documents** progress bar will be next to the **Transfer History** progress bar. The first progress bar will show all documents associated with the case. Staff can search by date range and filter the results by the section of the case file. This screen also includes the option to **Add New Documents** that will allow you to upload PDF attachments directly into TWIST.

Attaching PDF Documents in TWIST

- Step 1: Click **Choose File** if using **Chrome or Edge** or **Browse** if using **Internet Explorer**.
- Step 2: Navigate to the folder where the desired PDF is located, select the document, and click **Open**.
- Step 3: Enter the **Title of Document**. If no title is entered, the system will use the filename as the title. When naming a document, please do **NOT** use commas or special characters in the title.
- Step 4: Select the appropriate **Section** from the drop-down list. The available sections will be based on the type of case.
- Step 5: Select the appropriate **Form Description** from the drop-down list.
- Step 6: Enter the **Date of Document**.
- Step 7: Click **Attach**.

Attaching Case Pictures in TWIST

To attach pictures, select the **Add Picture** button on the **Case Pictures** progress bar. This screen works the same as **Add New Document**, except **Section** is not required.

Renaming or Deleting an Attached Document

To rename a document, select **Edit** to the right of the desired document in the grid. **NOTE: Edit** will only be available for documents and pictures that have been uploaded into TWIST using the **Add** button. To change the title, type the new title in the **Title of Document** field. For documents, the **Section** can also be changed by selecting the desired **Section** from the drop-down list. Once the **Title** and **Section** are correct, click **Update** to save the changes or **Cancel** to return to the grid without making the change. There is also an option to **Delete** the selected document.

If you have questions around uploading or renaming documents, please contact Courtney Croley, Social Service Specialist, DPP, at courtney.croley@ky.gov.

