



# Medical Eligibility

Imaging for DCF Support Staff

# Medical Eligibility: Imaging for DCF Support Staff

## Introduction

This course provides an overview of the fundamentals of imaging and explains the business process as it relates to the Imaging Solution for Support Staff.



## Agenda

- **Lesson 1: KEES Business Process**
- Lesson 2: ImageNow Basics
- Lesson 3: Imaging- CH Application
- Lesson 4: IN Printing- CAPP Application
- Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document



After completing this course, you will be able to:

- Identify 'Hot' or 'Cold' documents
- Batch and capture documents
- Perform imaging duties (tasks)



### ImageNow

- Ensures that all documents are secure, quickly retrievable, and associated to the files and applications you want.
- Captures and manages images from:
  - SSP
  - Applications/Reviews
  - Supporting Documents
  - Journaling
  - Email, MS Office or PDF (electronic)
- Gives workers the ability to view, scan, process and search for documents.

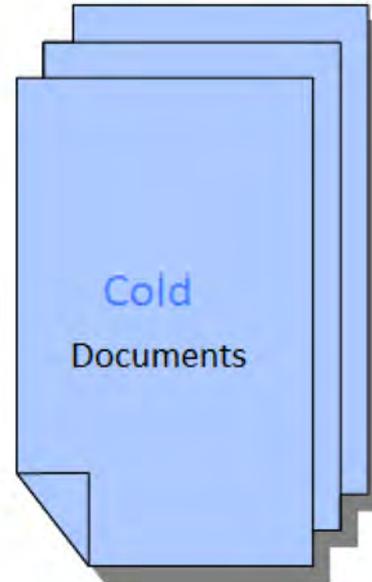
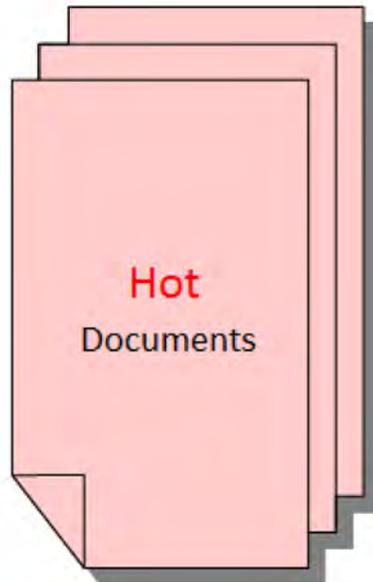
# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 1: KEES Business Process

Applications and Reviews will be registered and then imaged as either hot or cold based on the case status.

### What is Hot?

- Unworked or unprocessed document(s).
- **24 hour turnaround: Must be imaged same day-no later than next day.**
- If an eligibility determination is not made on an application received through the lobby.
- All Documents to be routed to the Clearinghouse.
- All documents received via non-lobby.

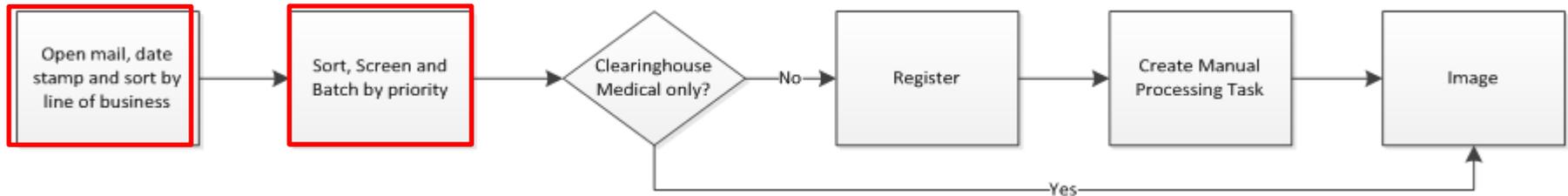


### What is Cold?

- Case information that requires no further action. For example, supporting documentation from a lobby interview, historical documents, and/or file only documentation.
- **Cold documents must be imaged within 3-5 days of receipt.**

# Medical Eligibility: Imaging for Support Staff

## Lesson 1: KEES Business Process

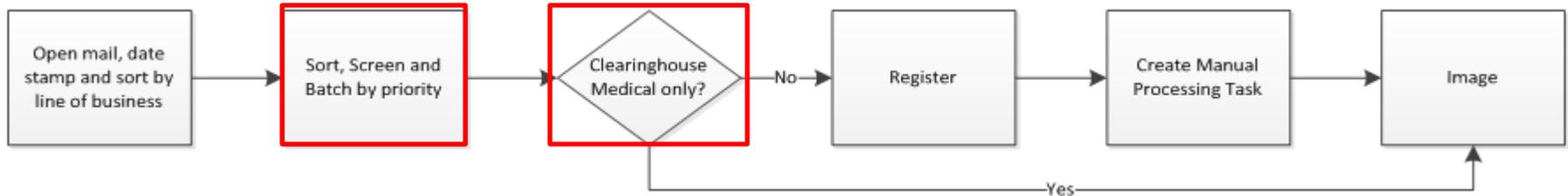


- Open mail, date stamp the front of each page, and then sort by the line of business (e.g. EES, VR, PPS, APS, CSS, Legal, Operations, LIEAP, and Administration).
- EES Documents:
  - Apply screening criteria:
    - Acceptable signature
    - “Big 4” criteria for Medical
    - Expedited Food Assistance
  - Sort documents into baskets accordingly (e.g. DCF Medical Application, DCF Non-Medical Application, CH Application, Expedited Food Assistance, Interim Reports, Non-Medical Reviews, Reviews, Unsigned Mail, Returned Mail, and Loose Mail).
  - Prepare documents for Registration and/or Imaging
    - Remove Staples
    - Fix Tears
    - Make copies of original documents and send originals back to consumers



# Medical Eligibility: Imaging for Support Staff

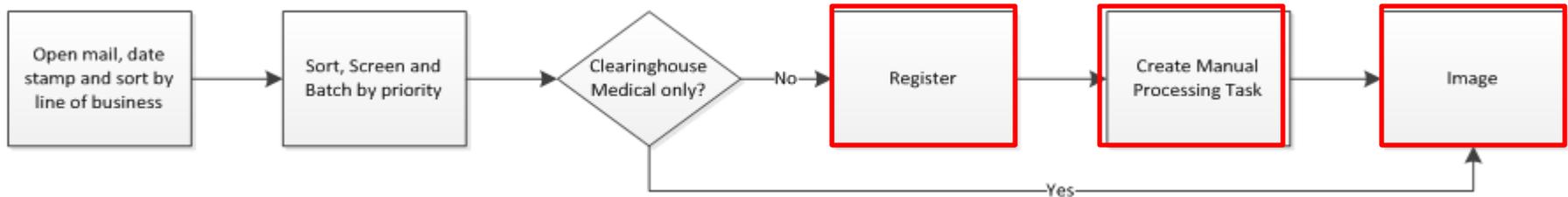
## Lesson 1: KEES Business Process



- Batch in groups of 25 (if applicable) with completed Non-Lobby Tracking Sheet
  - Paperclip documents received in the same envelope together (e.g. an application with all supporting documents is considered 1 “envelope”, loose mail from the same client includes paystubs, utility bill, and school records, this is considered 1 “envelope”). Each batch should have 25 “envelopes” if applicable.
  - Deliver batches to the correct location:
    - CH Applications, Returned Mail and Loose Mail to the **Hot Imaging Basket**
    - DCF Applications, Reviews and IR’s with supporting documents to the **Registration Basket**
    - Cold documents to the **Cold Imaging Basket**
    - Unsigned documents returned to client per policy

# Medical Eligibility: Imaging for Support Staff

## Lesson 1: KEES Business Process



- Register DCF Non-Medical and Medical applications, reviews, and interim reports.
  - Write Case Head and Case # on documents
  - Place document batch in the **HOT Imaging Basket**.
- Scan and index documents to ImageNow.
  - Image according to priority
  - Scan each envelope separately, indexing each item accurately
  - After imaging, staple documents together
  - Generate manual tasks for the appropriate queue
  - Return tracking sheet and rubber band completed batches as a visual cue that the batch is complete
  - Place completed batches into the 60 day retention area by scanned date

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 1: KEES Business Process

### The Non-Lobby Image Tracking Sheet

- Assists with sorting Non-Lobby Documents
- Identifies the ImageNow application plan & document type

Check the applicable box to identify the document batch & document type.

Received Date must match date stamp.

Attach tracking sheet to the documents and place in applicable basket. Maximum of 25 documents per tracking sheet.

Registration staff will return Image Tracking Sheet to document batch and place batch in Hot Imaging Basket.

The imager enters Scanned Date and Processed By.

The Tracking Sheet is not imaged.

### NON-LOBBY IMAGING TRACKING SHEET – PACKAGE MODE

05-13-2024

**BATCH IN 25 ACCORDING TO:**

Screened Yes for EXPEDITED FOOD ASSISTANCE  
\*Image using 'DCF Non-Medical' application plan with 'Application' document type.

Application Document Types	
<p><b>DCF Non-Medical:</b> <small>*Image using "DCF Non-Medical" application plan</small></p> <p><input type="checkbox"/> Application</p> <p><b>DCF Medical:</b> <small>*Image using "KEES Case" application plan</small></p> <p><input type="checkbox"/> Application</p>	<p><b>Clearinghouse:</b> <small>*Image using "KEES New Application(s)" application plan</small></p> <p><input type="checkbox"/> Expedited PW KanCare Application</p> <p><input type="checkbox"/> KanCare Application</p> <p><input type="checkbox"/> Potential CH Application *Route back to DCF</p> <p><input type="checkbox"/> Unsigned CH Application</p> <p><input type="checkbox"/> Urgent Need KanCare Application</p> <p><input type="checkbox"/> 3100/3100.1 EXP PW Application</p> <p><input type="checkbox"/> 3100/3100.1 Medical Application</p> <p><input type="checkbox"/> 3100/3100.1 Urgent Medical Application</p>

IR \*Image using "KEES DCF Non-Medical" application plan

NON-MEDICAL REVIEW \*Image using "KEES DCF Non-Medical" application plan

RETURNED MAIL \*Image using "KEES Case" or "KEES DCF Non-Medical" application plan

REVIEW \*Image using "KEES Case" application plan

UNSIGNED APPLICATION/REVIEW/IR \*DO NOT IMAGE – return to consumer

WORK PROGRAMS \*Image using "KEES DCF Non-Medical" application plan

LOOSE MAIL  
\*Index to appropriate document type using "KEES Case" or "KEES DCF Non-Medical" application plan

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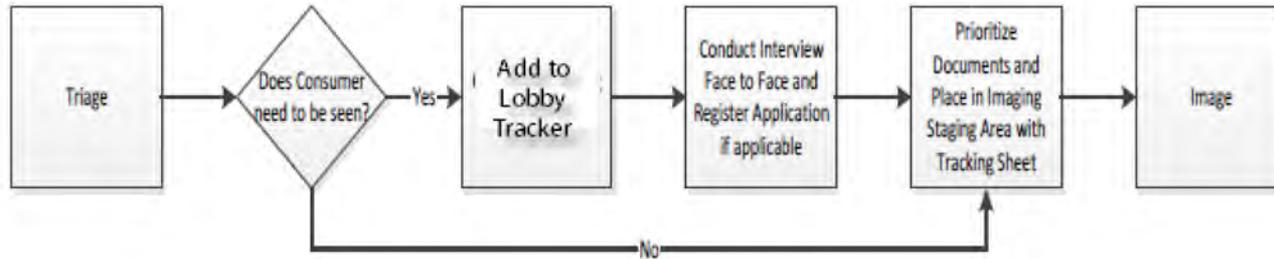
RECEIVED DATE:

SCANNED DATE:

PROCESSED BY:

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 1: KEES Business Process



Lobby documents will be registered and/or placed in the applicable imaging basket with the Lobby Tracking Sheet. DCF applications and reviews received via the lobby process will be registered by the worker during the interview.

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 1: KEES Business Process

The Lobby Imaging Tracking Sheet is used by workers after completing a lobby interview.

- The tracking sheet will be completed and attached to the documents received during the interview and placed in either the hot or cold imaging basket.
- The tracking sheet will not be imaged.

LOBBY IMAGING TRACKING SHEET – PACKAGE MODE 10-24-2014

<b>KAECSES</b> Case Head: <input style="width: 50px;" type="text"/>  Case #: <input style="width: 50px;" type="text"/>	<b>KEES</b> Case Head: <input style="width: 50px;" type="text"/>  Case #: <input style="width: 50px;" type="text"/>	<b>KSCares</b> Case Head: <input style="width: 50px;" type="text"/>  Case #: <input style="width: 50px;" type="text"/>
<b>PRIORITY:</b> <input type="checkbox"/> HOT <input type="checkbox"/> COLD <i>Outstationed Workers Only:</i> <input type="checkbox"/> Ready for 60 Day Retention	<b>AGENCY:</b> <i>**Image medical before non-medical**</i> <input checked="" type="checkbox"/> DCF <input type="checkbox"/> DCF Non-Medical <input type="checkbox"/> KEES Case <input checked="" type="checkbox"/> Clearinghouse <input type="checkbox"/> KEES New Application	
<b>DCF Document Types:</b> <input type="checkbox"/> Application <input type="checkbox"/> IR <input type="checkbox"/> Non-Medical Review <input type="checkbox"/> Review <i>*Medical</i> <input type="checkbox"/> Work Programs <input type="checkbox"/> Loose Mail <i>*Index to appropriate document type</i>	<b>Clearinghouse Document Types:</b> <input type="checkbox"/> Expedited PW KanCare Application <input type="checkbox"/> KanCare Application <input type="checkbox"/> Potential CH Application <i>*Route back to DCF</i> <input type="checkbox"/> Unsigned CH Application <input type="checkbox"/> Urgent Need KanCare Application <input type="checkbox"/> 3100/3100.1 EXP PW Application <input type="checkbox"/> 3100/3100.1 Medical Application <input checked="" type="checkbox"/> 3100/3100.1 Urgent Medical Application	
RECEIVED DATE: <input style="width: 100px;" type="text"/>  SCANNED DATE: <input style="width: 100px;" type="text"/>  PROCESSED BY: <input style="width: 100px;" type="text"/>  QUANTITY: <input style="width: 50px;" type="text"/>		

# Medical Eligibility: Imaging for DCF Support Staff

## Summary

In this lesson we looked at the business process for Imaging.

- We reviewed:
  - What makes a document “Hot” or “Cold”
  - Process for opening mail, date stamping & sorting
  - Process for screening, batching, registering, imaging and document retention

Next we will look at ImageNow basics.



## Agenda

- Lesson 1: KEES Business Process
- **Lesson 2: ImageNow Basics**
- Lesson 3: Imaging- CH Application
- Lesson 4: IN Printing- CAPP Application
- Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document

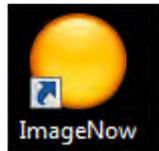


All ImageNow functions have the same basic steps:

- Launch ImageNow & log in
- Set Capture Profile
- Set Application Plan
- Prepare documents to be loaded into scanner
- Capture document to the correct Package basket and document type
- Index/re-index
- Quality Assurance: Visually confirm the captured image is of good quality and that documents are captured and indexed to the correct case number, document type, etc.
- Save/submit document to finalize imaging
- Set applicable Manual Tasks
- Document Storage- 60 day retention area

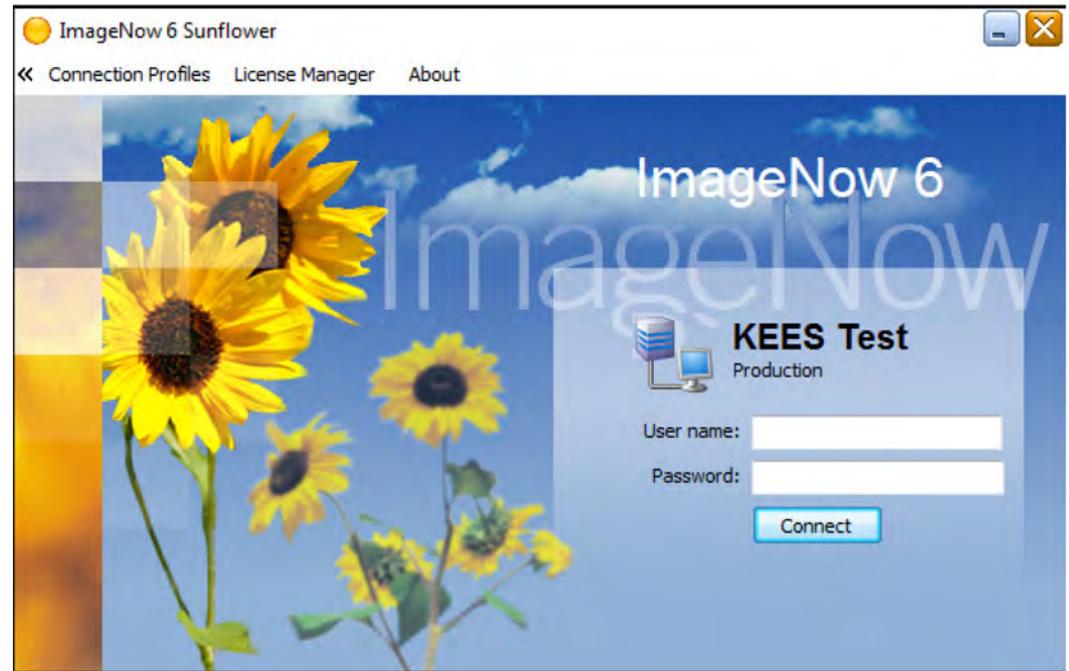


### Launch ImageNow



#### Log in to ImageNow

- KEES User name
- Password

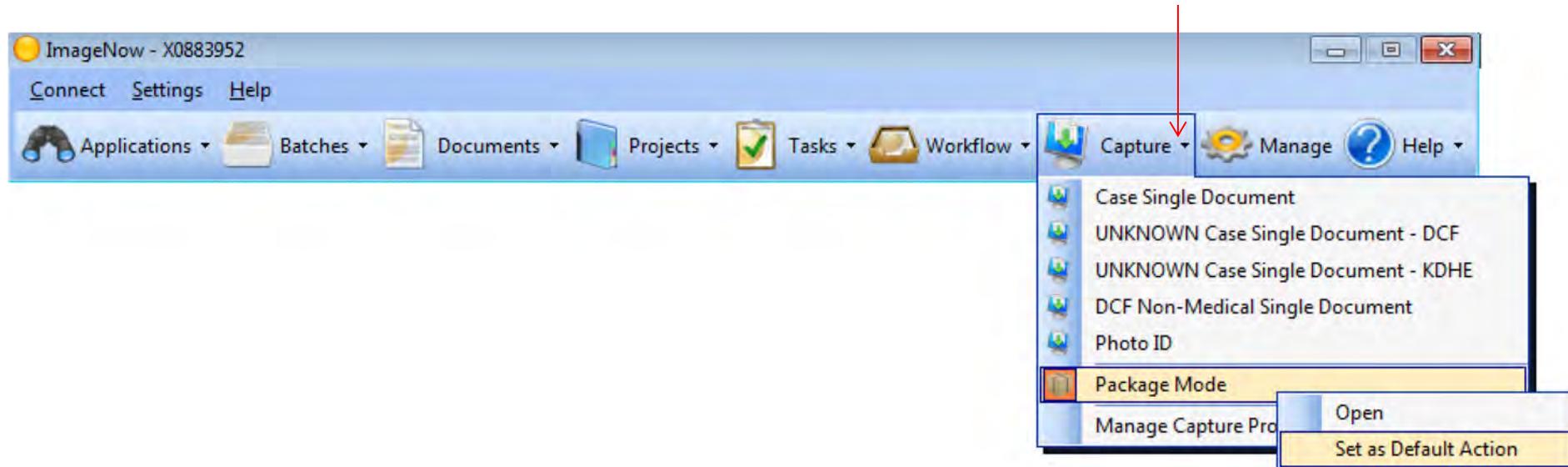




# Medical Eligibility: Imaging for DCF Support Staff

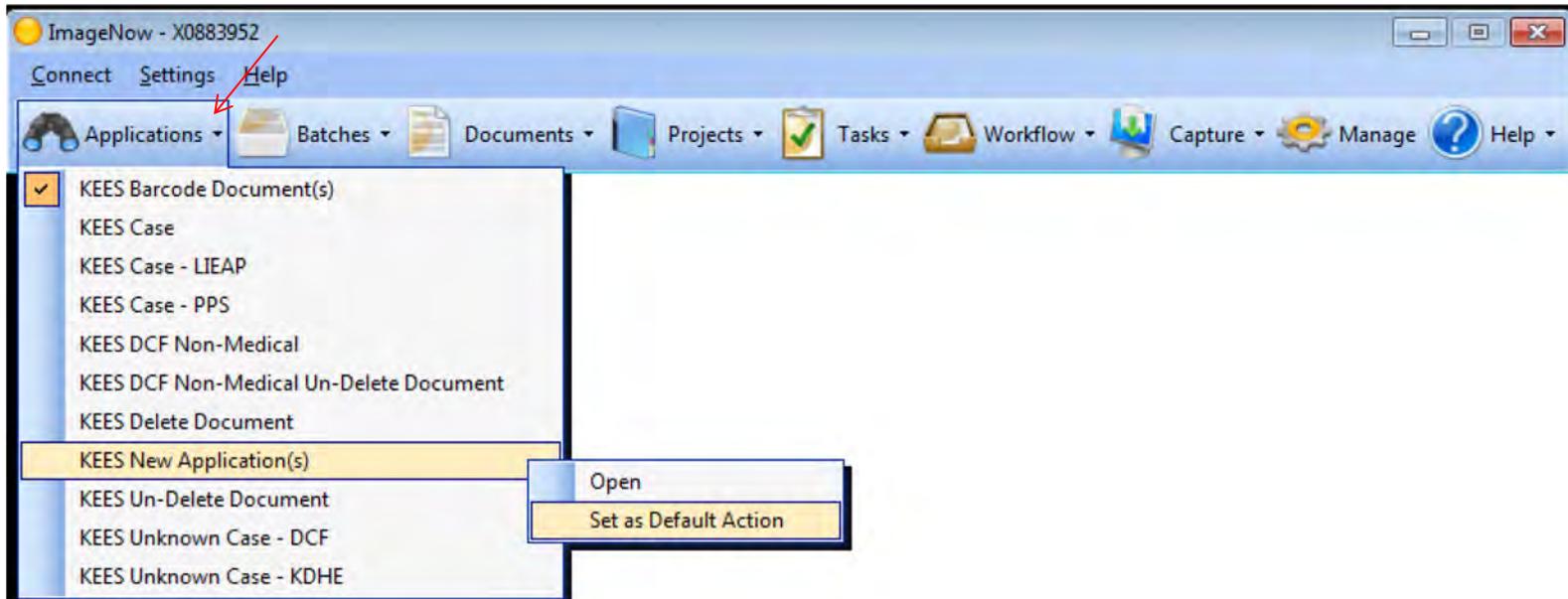
## Lesson 2: ImageNow Basics > Package Mode

Locate the **Capture** button. Set **Package Mode** as the default. DCF will always use **Package Mode** when capturing physical documents. This allows an individual to scan several types of documents for the same case at one time.



Once “Package Mode” is set as the default, the worker will not need to set this again unless using a different imaging station.

### Application Plan



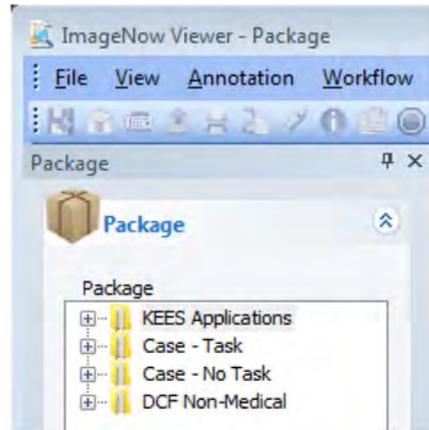
On the ImageNow toolbar, navigate to the **Applications** drop-down menu and click the caret to select the desired Application Plan.

Application Plans are containers that store mapped information used to assign drawer, document key, and custom property values to captured documents.

### Application Plans:

- **KEES Barcode Document:** Use for any document with a KEES generated barcode
- **KEES Case:** Use for any document tied to a DCF medical program and the KEES case number is known
- **KEES Case PPS:** Use for any document related to a PPS medical program and the case number is known
- **KEES DCF Non-Medical:** Use for any document tied to a non-medical program and the case number is known
- **KEES Deleted Document:** Documents deleted from a KEES document drawer will be re-indexed to this application plan
- **KEES New Application:** Always use when routing an application to the Clearinghouse
- **KEES Unknown Case-DCF:** Use when a document is received at DCF and cannot be tied to a person and/or a case number

### Package Baskets:



- **KEES Application:** Used to route work to the Clearinghouse. All tasks will be automatically generated by the image with a due date, task name and assigned queue.
- **Case- Task:** Not used by DCF during Medical Go-Live.
- **Case- No Task:** Used for DCF medical programs and PPS medical programs. A manual task will need to be created if appropriate after a document is imaged. Medical programs should have a KEES case number before a document is imaged.
- **DCF Non-Medical:** Used by DCF for all Non-Medical programs. A manually generated task will need to be created if appropriate after a document is imaged. Non-Medical programs will not have a KEES case number.

### Indexing:

- If applications or reviews have supplemental documents attached, support staff will index to the appropriate document type within the KEES case or KEES DCF Non-Medical Drawer. Users can split the documents to correct document types before submitting the images or can choose to drag and drop later.
- When routing applications to the Clearinghouse, DCF staff are NOT expected to index the supporting documents.
- Personal Identifying Information can only be indexed to the “person level” on Medical cases. The process requires ImageNow to pull household member information from the KEES case via the eForm to associate the “person level” document to the specific household member.

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 2: ImageNow Basics > Case Level vs. Person Level

Documents that are received from the consumer will be imaged and indexed at either a person level or case level.

### **Case level:**

- Document is associated to the case, not a specific person
- Includes general documents (i.e. applications, reviews, pay stubs)

### **Person level:**

- Document follows the person from case to case
- Includes personal identifying documents (i.e. birth certificates, ID, social security card)



### Indexing eForm:

- Tool used to correct any indexing mistakes.
- Allows users to index a document to a specific case person.
- Used to Re-index a document to a different case number.
- Index eForm functionality applies to KEES case numbers only.



The screenshot displays the 'Indexing eForm' interface within the Kansas Eligibility Enforcement System (KEES). The header includes the KEES logo and the text 'Kansas Eligibility Enforcement System (KEES) Indexing eForm'. The form contains several input fields and controls:

- Refresh** and **Submit** buttons at the top.
- Case Number** and **Case Name** input fields.
- Pages** input field.
- Document Category** dropdown menu.
- Doc Type** dropdown menu.
- Applicable Date** and **Received Date** input fields.
- Selected Case Member Information** section with a search icon.
- Mark for Delete** checkbox.
- New**, **Copy**, and **Remove** buttons at the bottom.

### **The UNKNOWN Drawer:**

When a document is received and cannot be associated to a person or a case, it will be imaged and stored within the “Unknown” drawer.

- This document drawer will be shared statewide among all DCF KEES users.
- DCF is going to allow Eligibility Workers to look in the drawer and re-index “Unknown” documents as needed.
- Each office is to designate one person to manage and routinely clean-up the drawer as well.

### The UNKNOWN Drawer:

**First Name** and **Last Name** are required indexing fields. If first and/or last name is unknown, staff are to enter “Unknown” in the corresponding field(s).

Staff are to enter the Office Location in the First Name field along with the name.

- If First Name is known: “Topeka Jane” and if not known “Topeka Unknown”
- If Last Name is known: “Topeka Doe” and if not known “Topeka Unknown”

# Medical Eligibility: Imaging for DCF Support Staff

## Summary

In this lesson we looked at the basics of Imaging:

- How to Launch and Log In to ImageNow
- Capture and Application Plans
- Preparing documents to be loaded into scanner
- Capture document to the correct Package basket and document type
- Indexing/re-indexing
- Quality
- Saving/submitting document to finalize imaging
- Setting applicable Manual Tasks
- Document Storage- 60 day retention area



## Agenda

- Lesson 1: KEES Business Process
- Lesson 2: ImageNow Basics
- **Lesson 3: Imaging**
- Lesson 4: In Printing- CAPP Application
- Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document



In this lesson we will learn:

- How to Screen for the Big 4
- How to Image an Application received at DCF that needs to go to the Clearinghouse
- How to Image a DCF Medical Application



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > Screening for the Big 4

### Applications: Big 4 Screening

*Applying* is the key word in this concept.

Requesting LTC  
(Institutional or HCBS  
or PACE)

Requesting MSP only

Age 65 or older, not  
pregnant, nor the  
caretaker of a minor  
child

Medicare beneficiary,  
not pregnant, nor the  
caretaker of a minor  
child

If **ALL** individuals applying for Medical meet one of the Big 4 criteria, the application remains at DCF.  
When minor children are part of the household, they only impact the screening criteria if the family is also requesting  
Medical for the minor children.

All other requests are sent to the KanCare Clearinghouse for a MAGI eligibility determination.

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > Medical Application for the Clearinghouse

### Capture and Image a Medical Application received at DCF for the Clearinghouse

Complete the Non-Lobby Imaging Tracking Sheet and attach to the application and supporting documents.

Place documents in the HOT basket.

#### NON-LOBBY IMAGING TRACKING SHEET – PACKAGE MODE

05-18-2014

**BATCH IN 25 ACCORDING TO:**

Screened Yes for EXPEDITED FOOD ASSISTANCE  
\*Image using "DCF Non-Medical" application plan with "Application" document type.

Application Document Types	
<p><b>DCF Non-Medical:</b> <small>*Image using "DCF Non-Medical" application plan</small></p> <p><input type="checkbox"/> Application</p> <p><b>DCF Medical:</b> <small>*Image using "KEES Case" application plan</small></p> <p><input type="checkbox"/> Application</p>	<p><b>Clearinghouse:</b> <small>*Image using "KEES New Application(s)" application plan</small></p> <p><input type="checkbox"/> Expedited PW KanCare Application</p> <p><input checked="" type="checkbox"/> KanCare Application</p> <p><input type="checkbox"/> Potential CH Application *Route back to DCF</p> <p><input type="checkbox"/> Unsigned CH Application</p> <p><input type="checkbox"/> Urgent Need KanCare Application</p> <p><input type="checkbox"/> 3100/3100.1 EXP PW Application</p> <p><input type="checkbox"/> 3100/3100.1 Medical Application</p> <p><input type="checkbox"/> 3100/3100.1 Urgent Medical Application</p>

IR \*Image using "KEES DCF Non-Medical" application plan

NON-MEDICAL REVIEW \*Image using "KEES DCF Non-Medical" application plan

RETURNED MAIL \*Image using "KEES Case" or "KEES DCF Non-Medical" application plan

REVIEW \*Image using "KEES Case" application plan

UNSIGNED APPLICATION/REVIEW/IR \*DO NOT IMAGE – return to consumer

WORK PROGRAMS \*Image using "KEES DCF Non-Medical" application plan

LOOSE MAIL  
\*Index to appropriate document type using "KEES Case" or "KEES DCF Non-Medical" application plan

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RECEIVED DATE: 04/08/2015

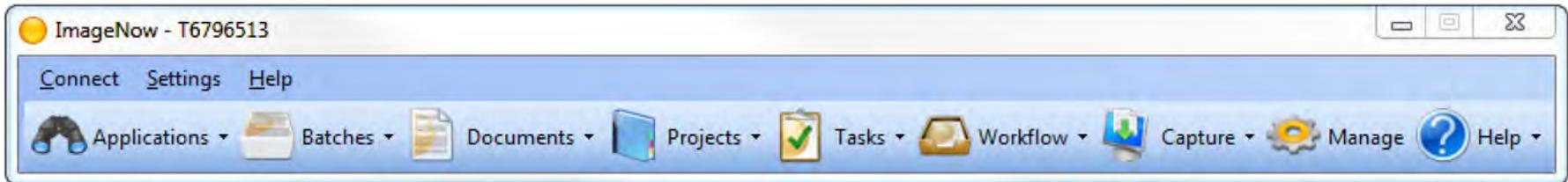
SCANNED DATE: 04/08/2015

PROCESSED BY: Mary Smith

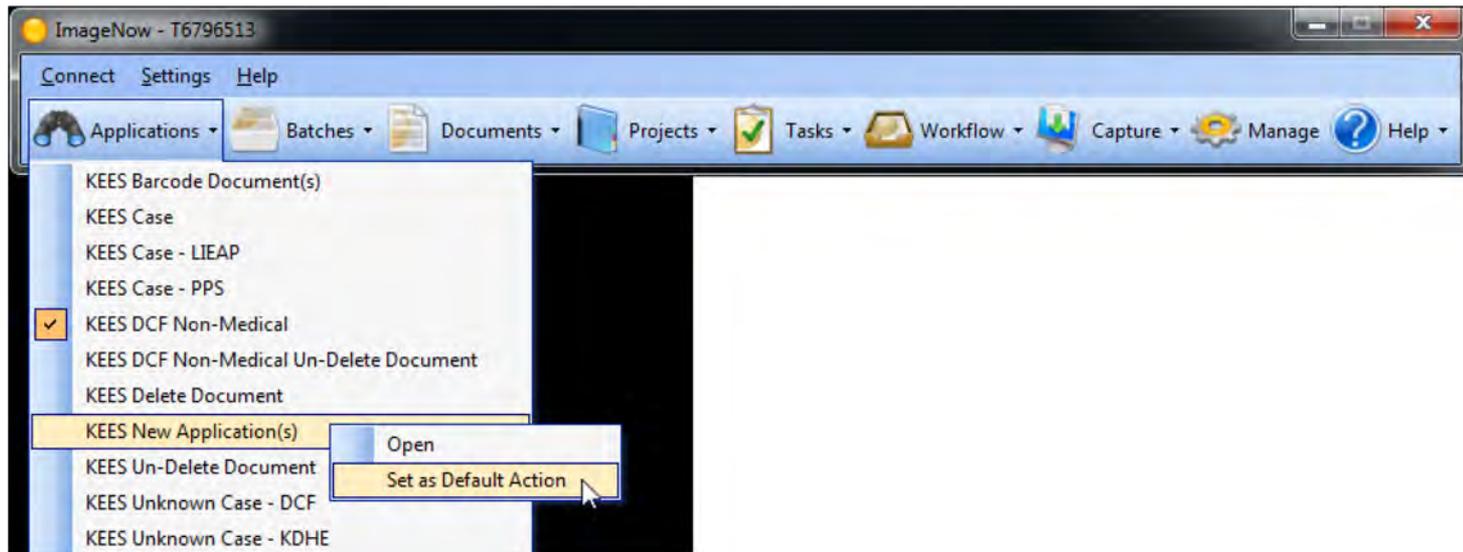
# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > Medical Application for the Clearinghouse

### Access ImageNow



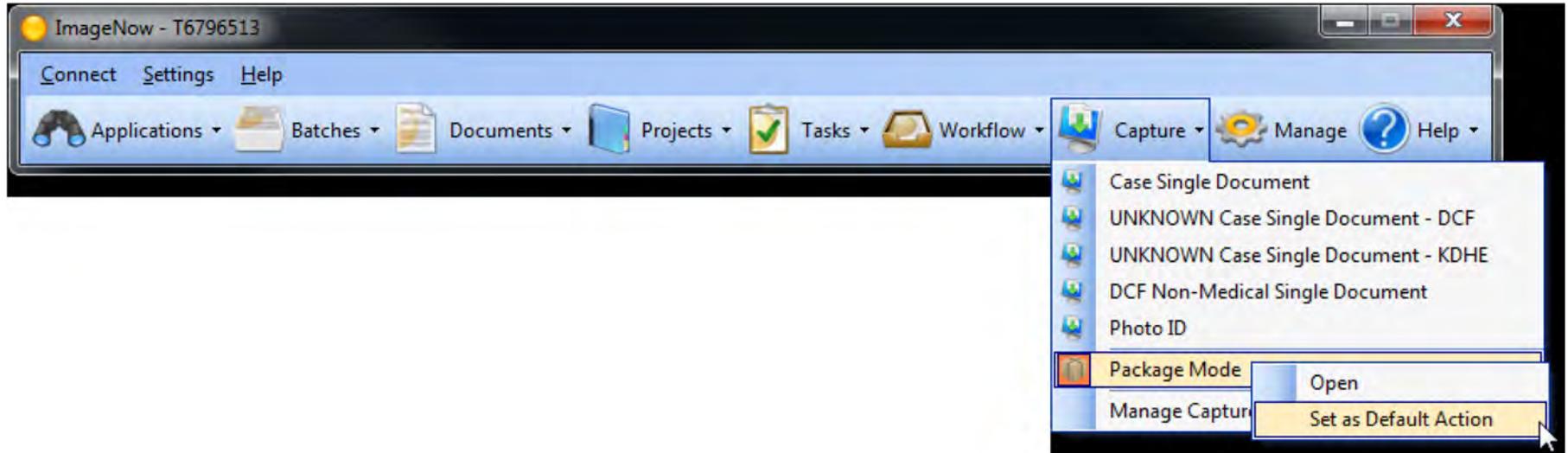
Set **KEES New Application(s)** as the default application plan.





# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > Medical Application for the Clearinghouse

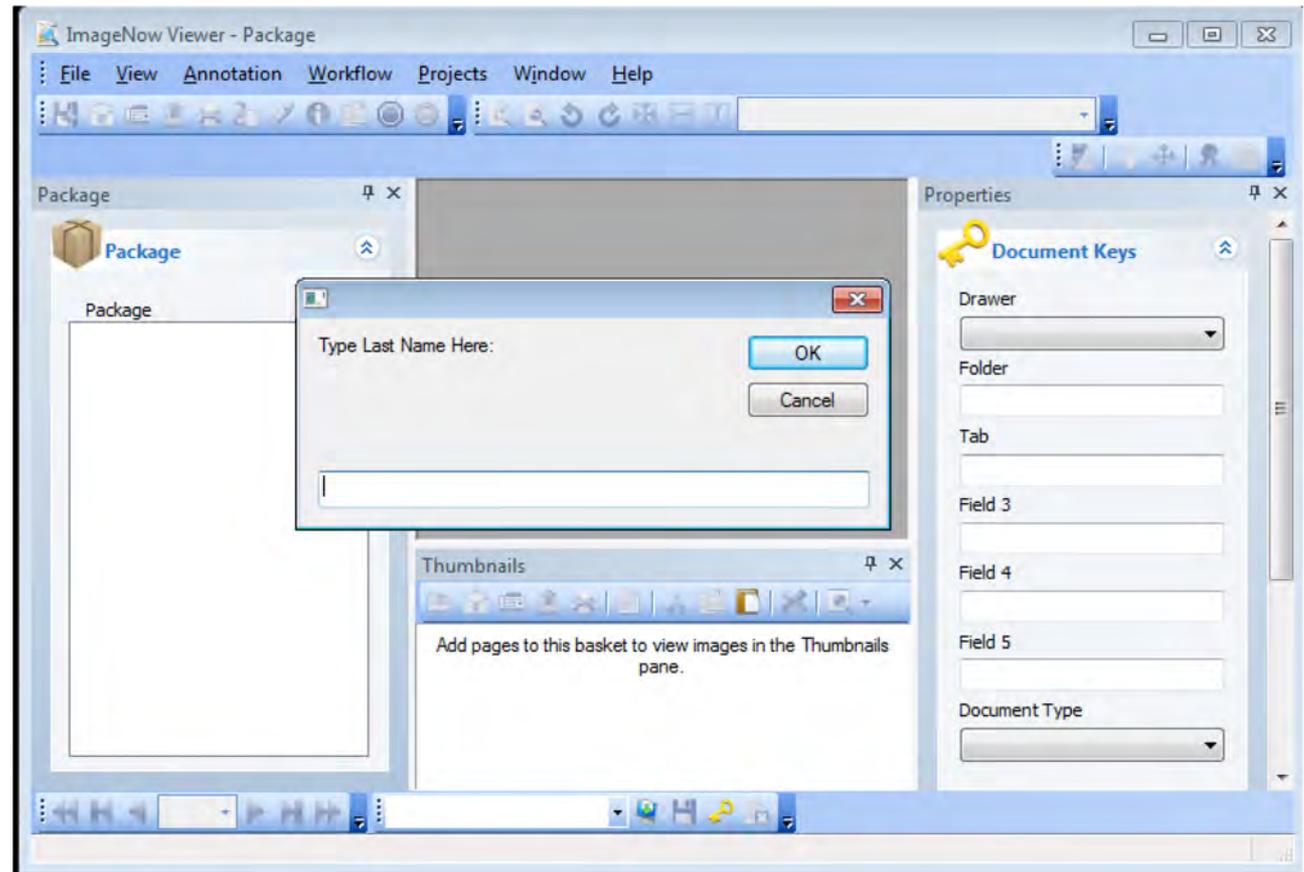


Check the Capture Profile to verify that it is set to Package Mode.

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > Medical Application for the Clearinghouse

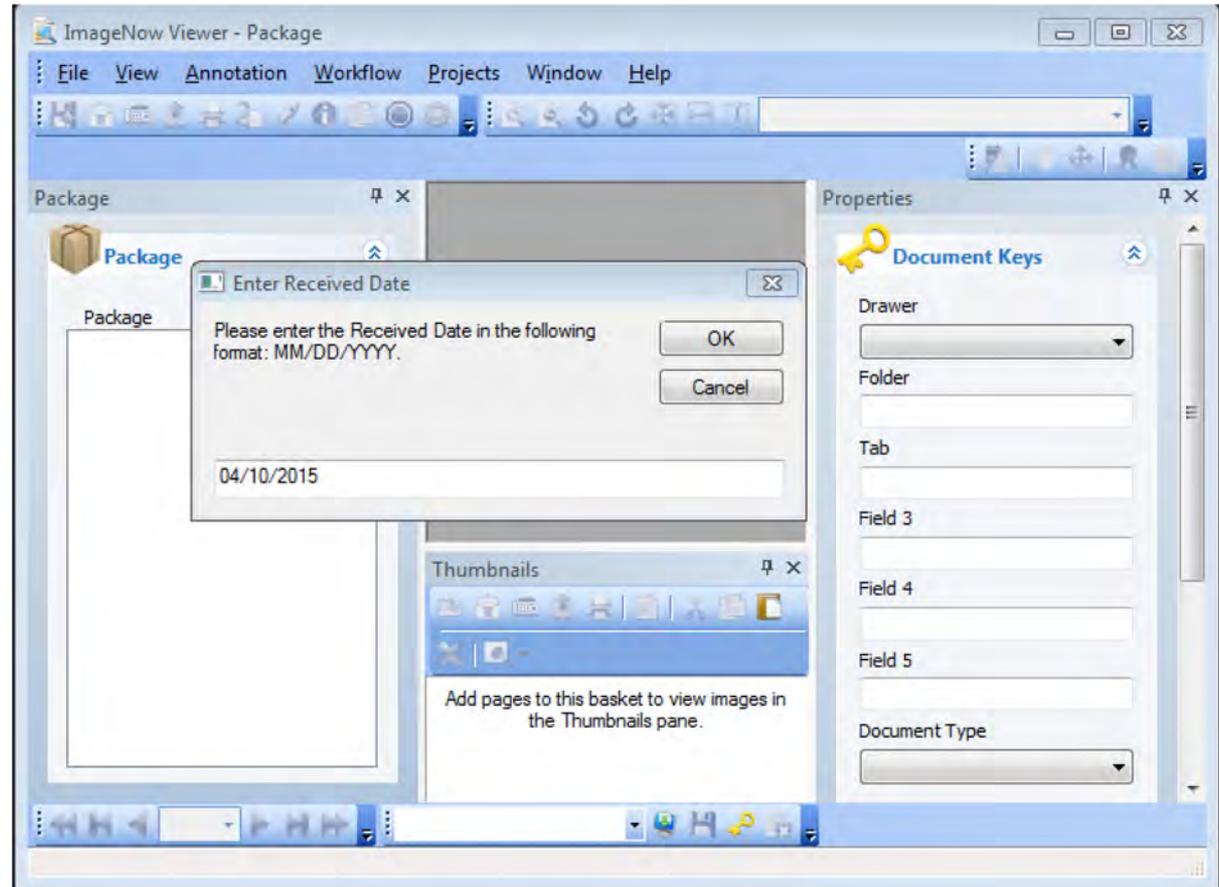
The **Type Last Name Here:** dialog box will display. Enter the applicant's last name and click the **OK** button.



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > Medical Application for the Clearinghouse

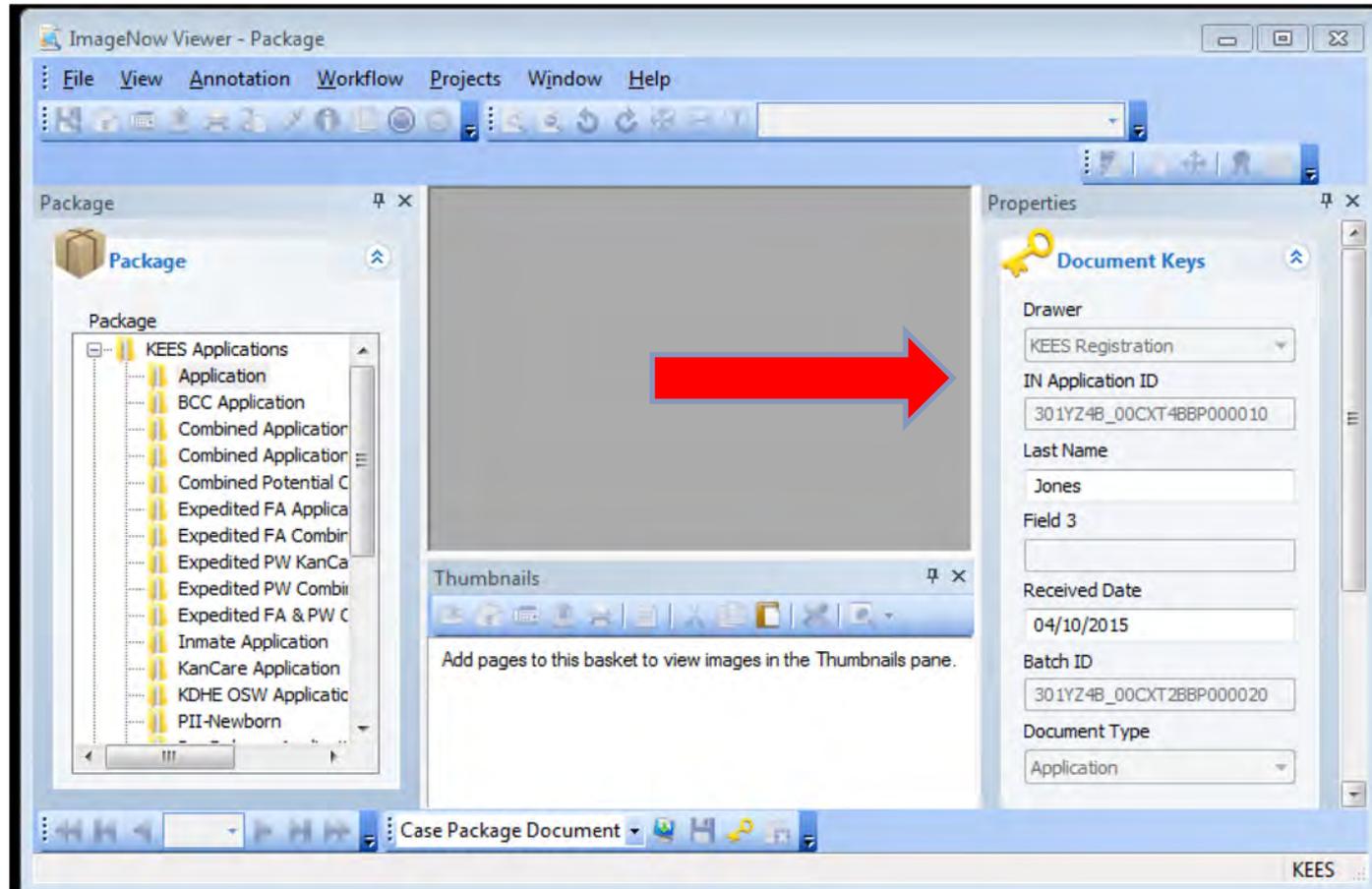
The **Enter Received Date** dialog box will display with the current date populated. Workers will need to update that field to the date that the document was date stamped and then click the **OK** button.



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > Medical Application for the Clearinghouse

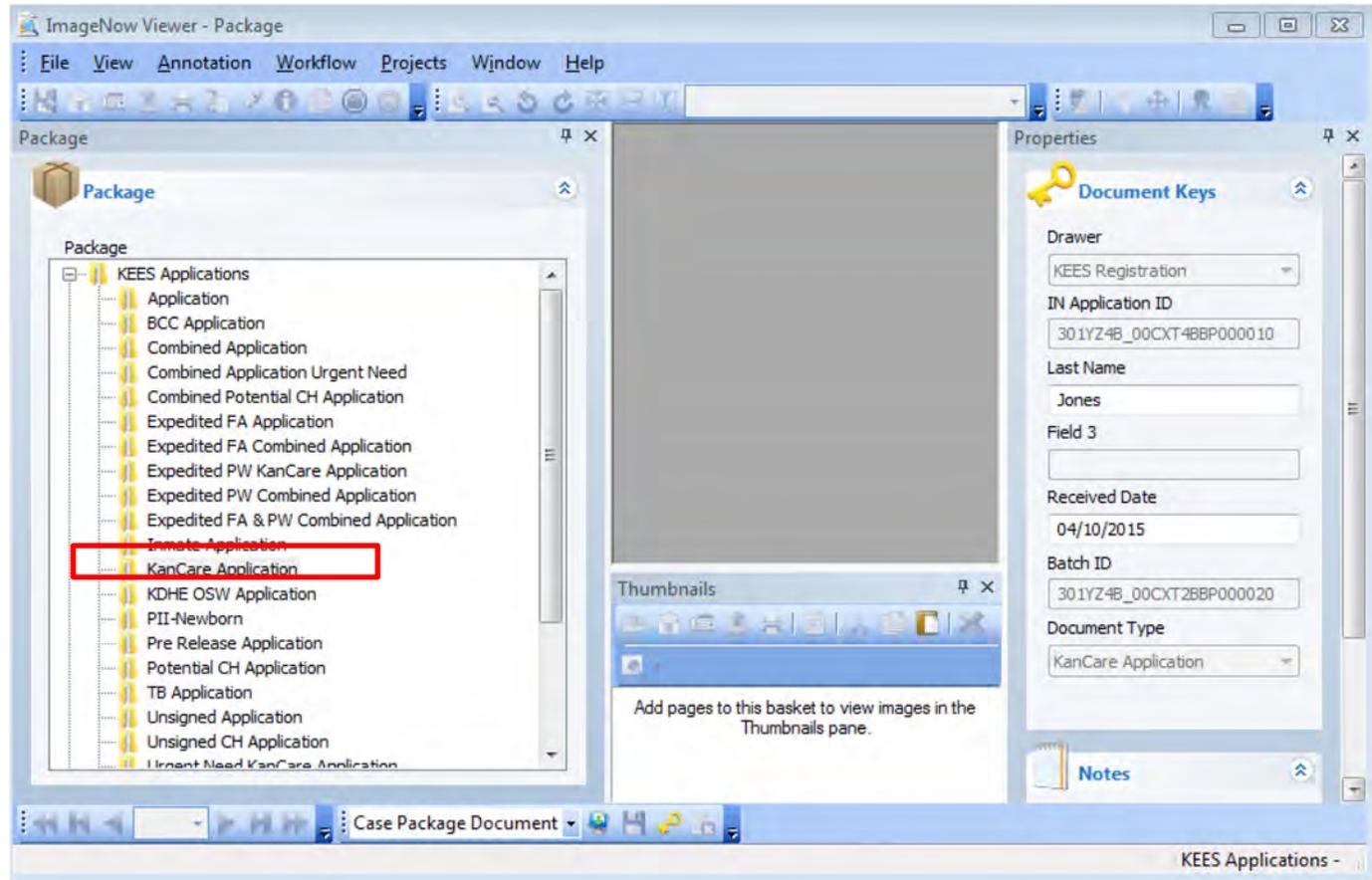
On the **ImageNow Viewer-Package** screen, the **Document Keys** dialog box will display with the Last Name and Received Date boxes filled in. Workers will need to update the date to the correct received date (must match the date stamp) if they did not do so in the previous step.



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > Medical Application for the Clearinghouse

Select the appropriate Clearinghouse Document type in the **KEES Applications** basket (i.e. KanCare Application)

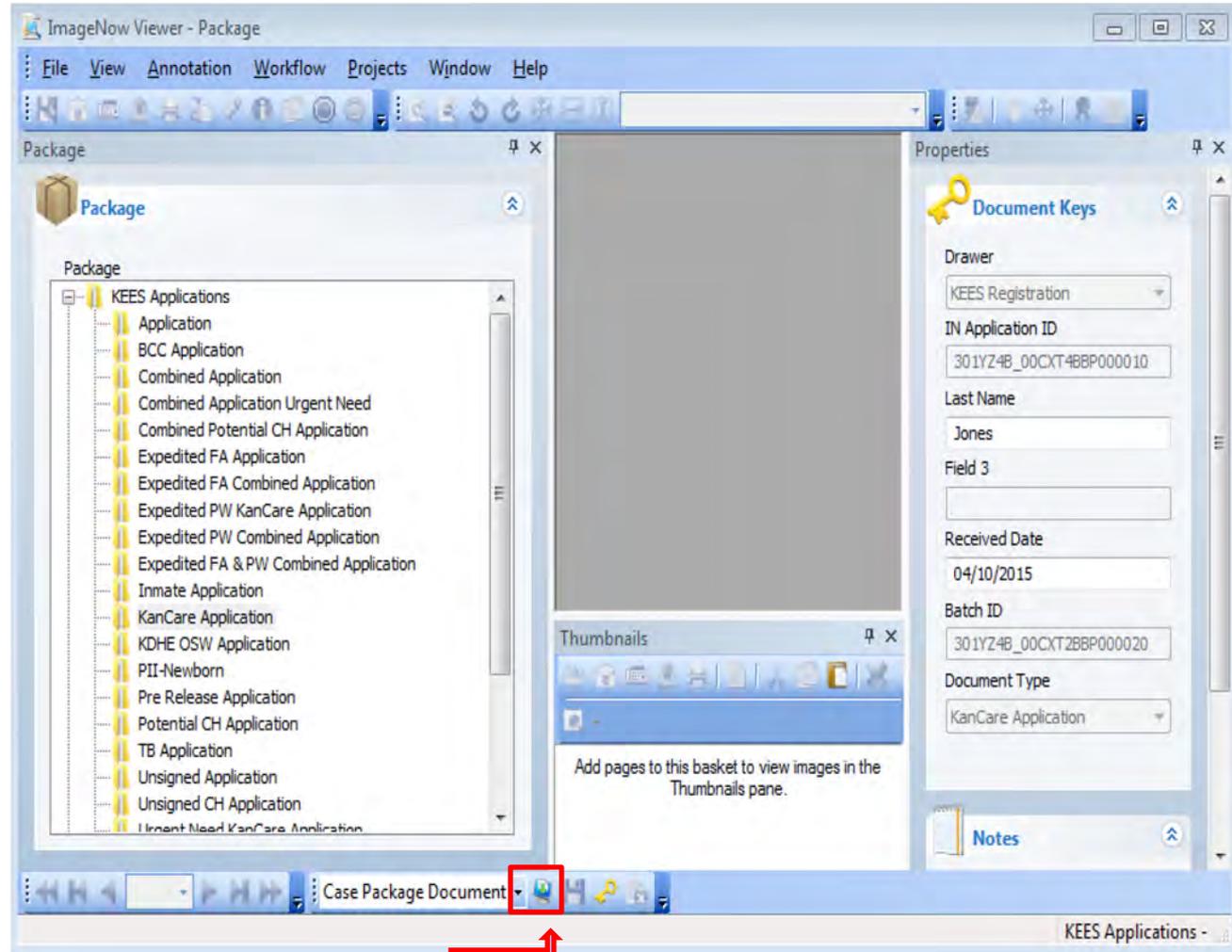




# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > Medical Application for the Clearinghouse

Load the application and all the consumer's supporting paper document in the scanner.  
Click the **Capture** icon on the bottom of the screen.

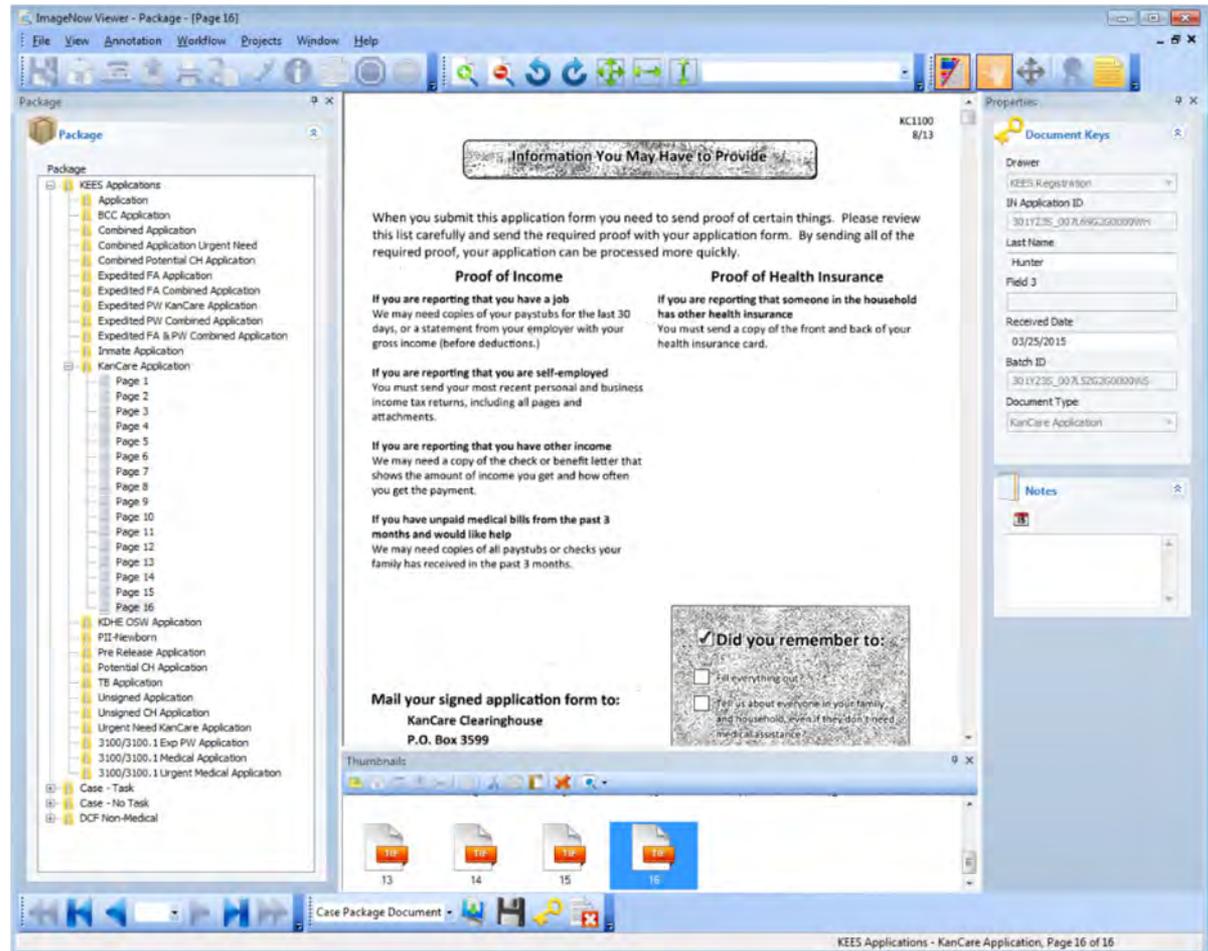




# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > Medical Application for the Clearinghouse

The scanned image will go directly into the document type that was selected and will appear in the ImageNow Viewer. Quality Assurance should be used to visually confirm the captured image(s) are of good quality and that all documents are captured and indexed to the correct case information.



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > Medical Application for the Clearinghouse

Click the **Submit** button. The document(s) will be indexed to the **KEES Registration Documents** drawer and a task will be created for the Clearinghouse to register the application.

The screenshot shows the ImageNow Viewer interface for a medical application. The main content area displays the 'Application for Medical Assistance for Families with Children' form, dated MAR 2 5 2015. The form includes sections for 'Who can use this application?', 'Use this application to see what choices you have', and 'Apply faster online'. A table of contents is visible at the bottom of the form, listing sections A through F. The left sidebar shows a 'Package' tree with various application types, including 'KEES Applications' and 'KanCare Application'. The right sidebar shows 'Document Keys' and 'Properties' for the current document. At the bottom of the viewer, a red box highlights the 'Submit' button.

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > DCF Medical Application

### DCF Medical Application- Non-Lobby

Place tracking sheet with application in the Registration location.

Up to 25 documents may be attached to one DCF Medical Application Non-Lobby Tracking Sheet based on the day's mail.

Register and image one client's application at a time.

#### NON-LOBBY IMAGING TRACKING SHEET – PACKAGE MODE

05-15-2014

**BATCH IN 25 ACCORDING TO:**

Screened Yes for EXPEDITED FOOD ASSISTANCE  
*\*Image using "DCF Non-Medical" application plan with "Application" document type.*

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<p><b>DCF Non-Medical:</b> <i>*Image using "DCF Non-Medical" application plan</i></p> <p><input type="checkbox"/> Application</p> <p><b>DCF Medical:</b> <i>*Image using "KEES Case" application plan</i></p> <p><input checked="" type="checkbox"/> Application</p>	<p><b>Clearinghouse:</b> <i>*Image using "KEES New Application(s)" application plan</i></p> <p><input type="checkbox"/> Expedited PW KanCare Application</p> <p><input type="checkbox"/> KanCare Application</p> <p><input type="checkbox"/> Potential CH Application <i>*Route back to DCF</i></p> <p><input type="checkbox"/> Unsigned CH Application</p> <p><input type="checkbox"/> Urgent Need KanCare Application</p> <p><input type="checkbox"/> 3100/3100.1 EXP PW Application</p> <p><input type="checkbox"/> 3100/3100.1 Medical Application</p> <p><input type="checkbox"/> 3100/3100.1 Urgent Medical Application</p>

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NON-MEDICAL REVIEW *\*Image using "KEES DCF Non-Medical" application plan*

RETURNED MAIL *\*Image using "KEES Case" or "KEES DCF Non-Medical" application plan*

REVIEW *\*Image using "KEES Case" application plan*

UNSIGNED APPLICATION/REVIEW/IR *\*DO NOT IMAGE – return to consumer*

WORK PROGRAMS *\*Image using "KEES DCF Non-Medical" application plan*

LOOSE MAIL  
*\*Index to appropriate document type using "KEES Case" or "KEES DCF Non-Medical" application plan*

---

RECEIVED DATE:

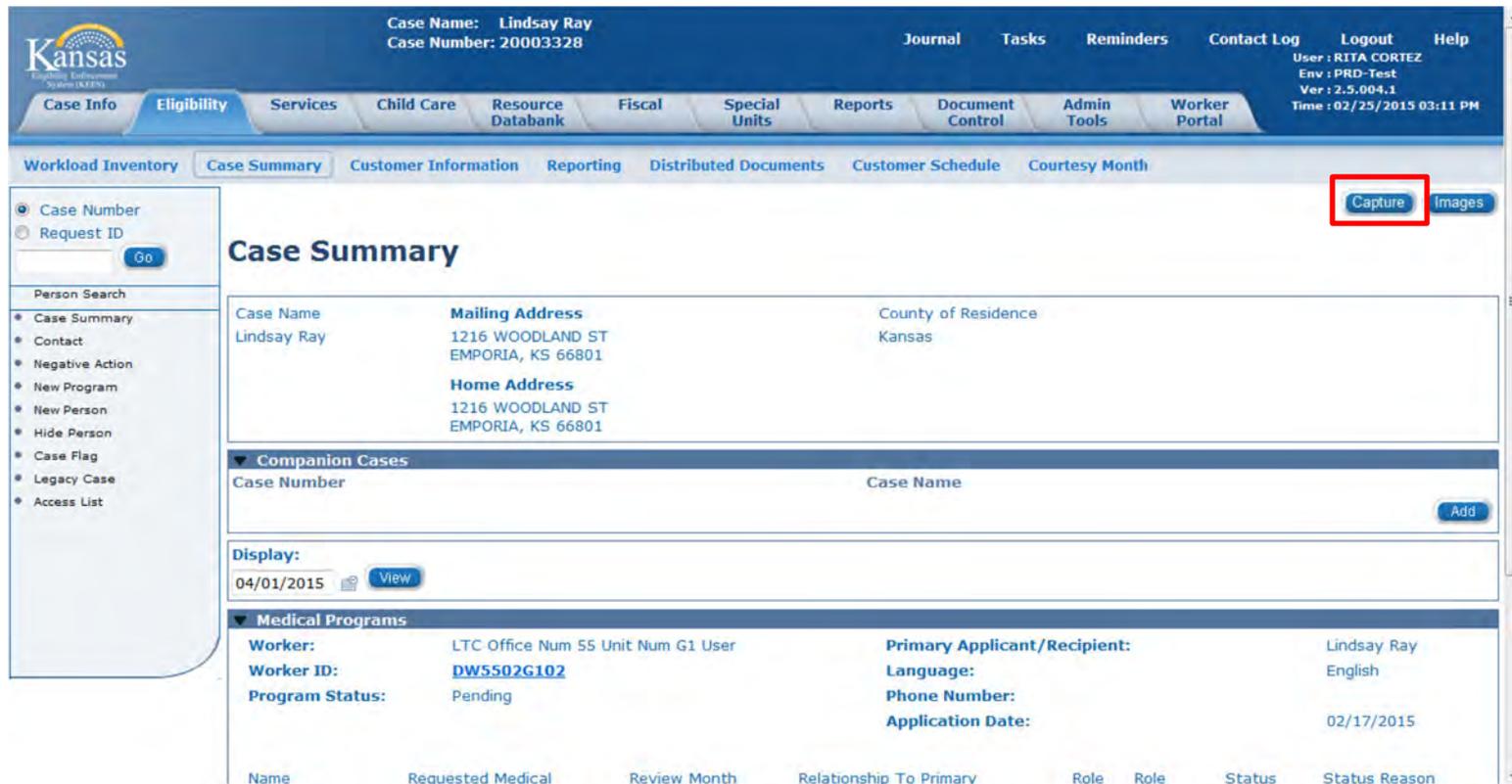
SCANNED DATE:

PROCESSED BY:

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > DCF Medical Application

Within the context of a KEES case, navigate to the **Case Summary** page using the KEES Case# assigned during registration. Click the **Capture** button on the screen.



**Case Name:** Lindsay Ray  
**Case Number:** 20003328

Journal Tasks Reminders Contact Log Logout Help  
User : RITA CORTEZ  
Env : PRD-Test  
Ver : 2.5.004.1  
Time : 02/25/2015 03:11 PM

Case Info Eligibility Services Child Care Resource Databank Fiscal Special Units Reports Document Control Admin Tools Worker Portal

Workload Inventory Case Summary Customer Information Reporting Distributed Documents Customer Schedule Courtesy Month

Case Number Request ID Go

Person Search

- Case Summary
- Contact
- Negative Action
- New Program
- New Person
- Hide Person
- Case Flag
- Legacy Case
- Access List

### Case Summary

**Case Name:** Lindsay Ray  
**Mailing Address:** 1216 WOODLAND ST, EMPORIA, KS 66801  
**County of Residence:** Kansas  
**Home Address:** 1216 WOODLAND ST, EMPORIA, KS 66801

▼ Companion Cases

Case Number	Case Name

Display: 04/01/2015 View

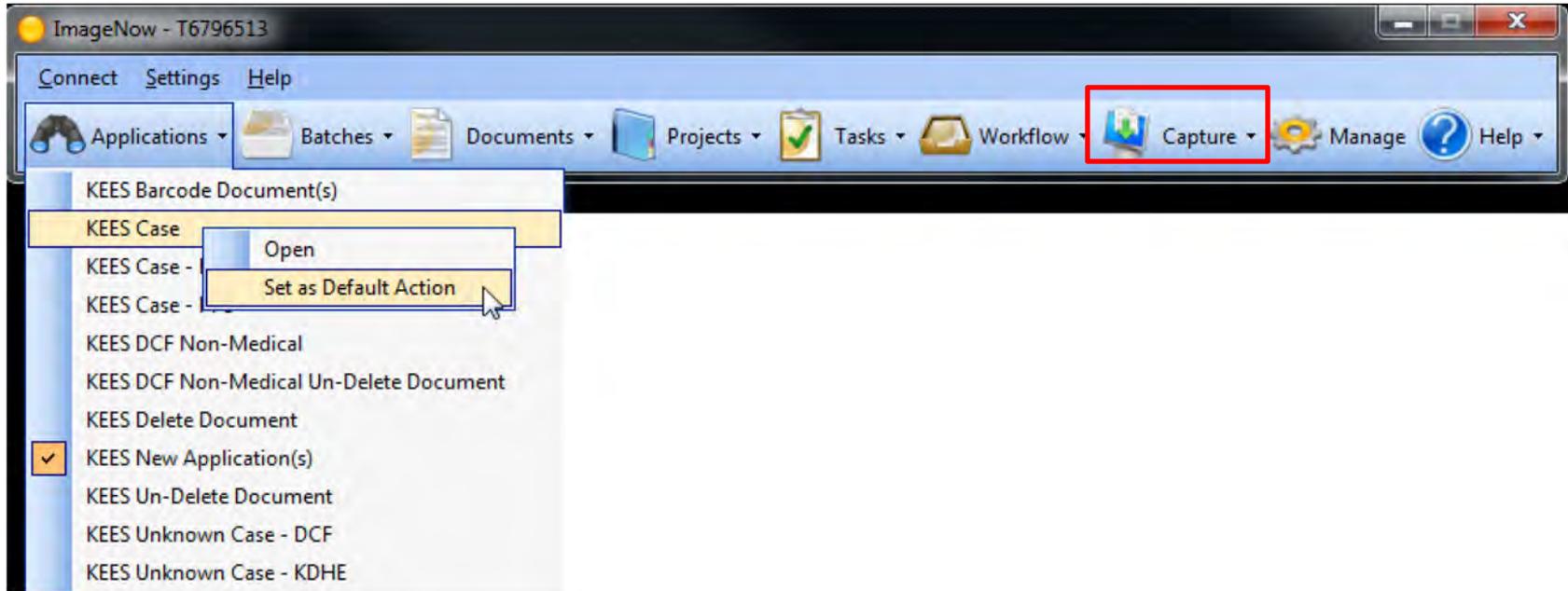
▼ Medical Programs

<b>Worker:</b>	LTC Office Num 55 Unit Num G1 User	<b>Primary Applicant/Recipient:</b>	Lindsay Ray
<b>Worker ID:</b>	<a href="#">DWS502G102</a>	<b>Language:</b>	English
<b>Program Status:</b>	Pending	<b>Phone Number:</b>	
		<b>Application Date:</b>	02/17/2015

Name	Requested Medical	Review Month	Relationship To Primary	Role	Role	Status	Status Reason

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > DCF Medical Application

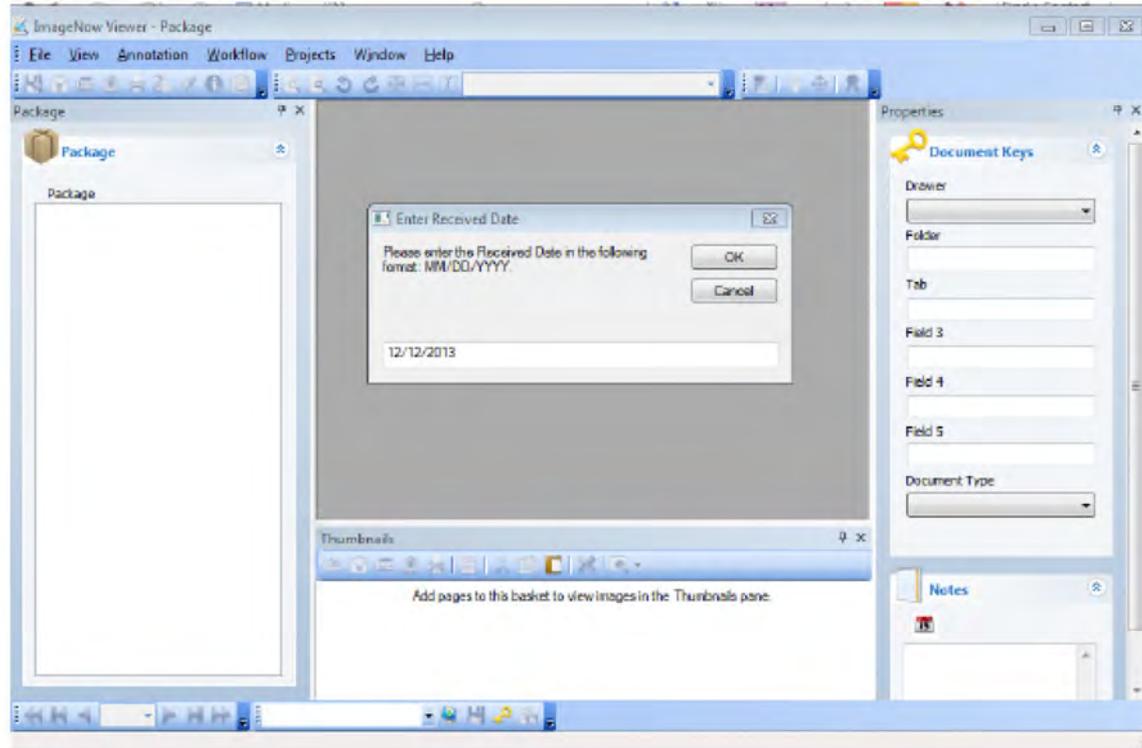


On the ImageNow toolbar, locate the Applications drop-down and select **KEES Case** as the Application Plan default. Always use **KEES Case** application plan for any document tied to a DCF medical program when the KEES case number is known.

Select the **Capture** Button after setting the default Application Plan.

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > DCF Medical Application



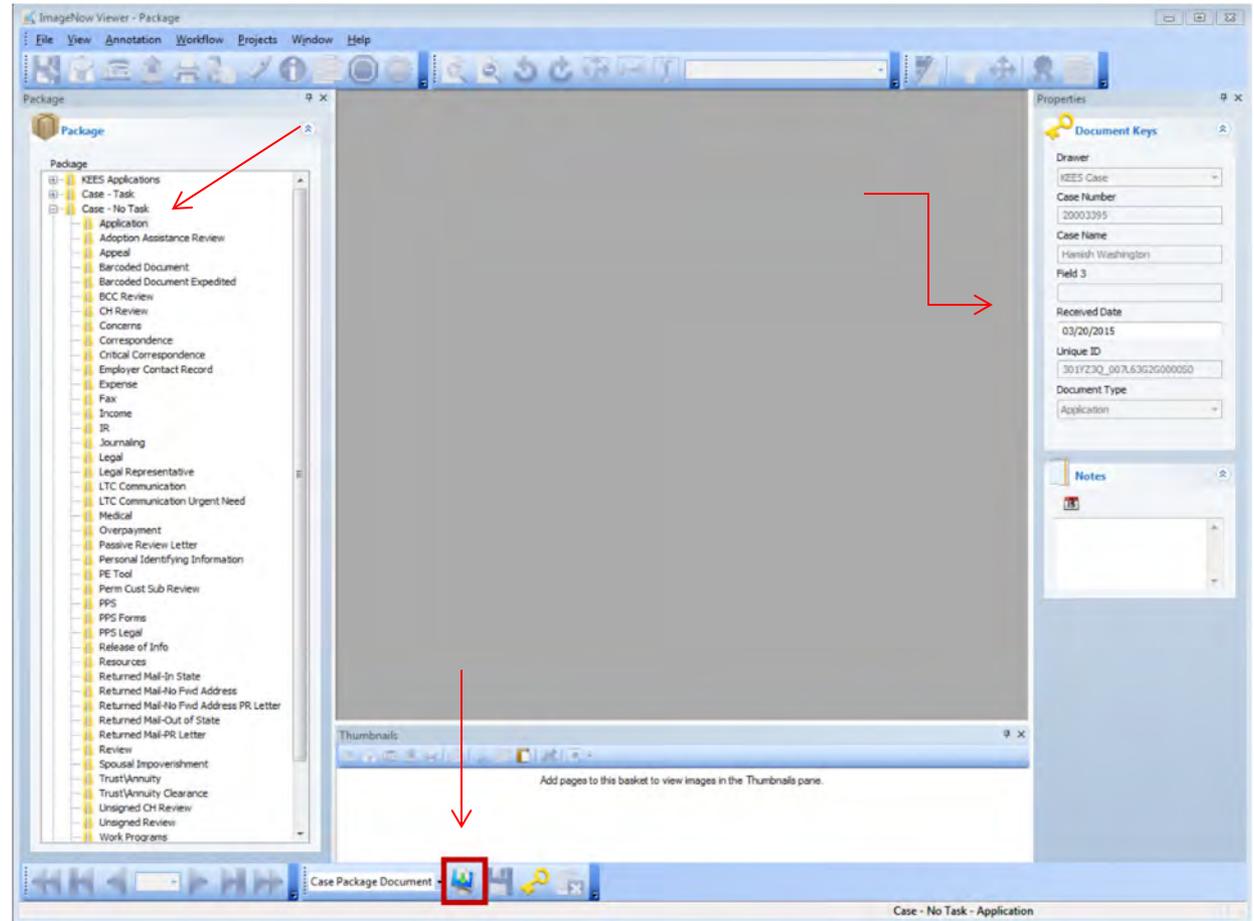
Enter Received Date- must match date stamp.



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > DCF Medical Application

Select the **Case-No Task** drawer and **Application** document type. Verify that the KEES Case #, Case Name and Received Date are correct. Click the **Capture** icon on the bottom of the screen.

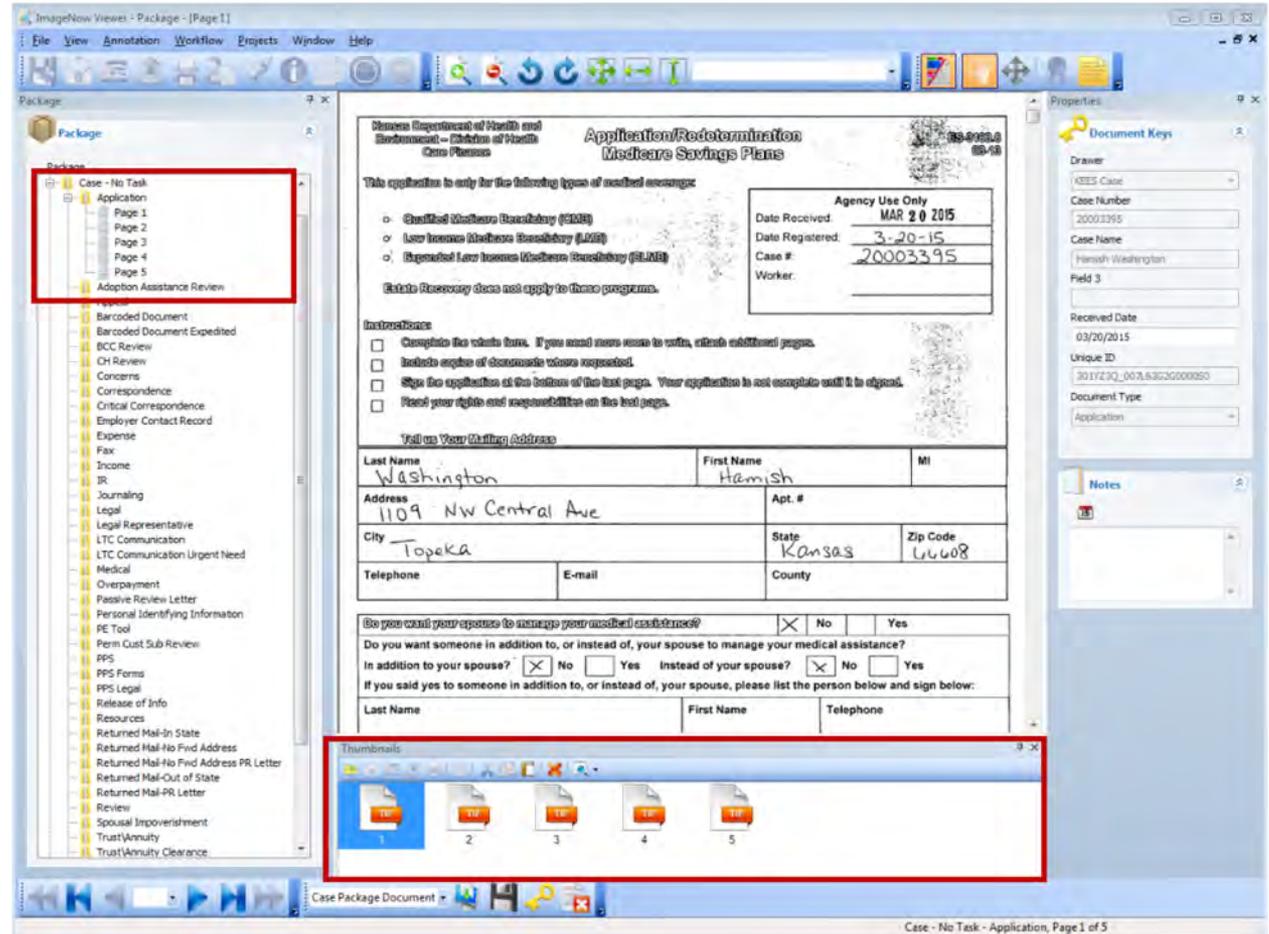




# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > DCF Medical Application

The image of the application displays in the **ImageNow Viewer**. Quality Assurance should be used to confirm the image(s) are of good quality and all documents are captured and indexed to the correct case.



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 3: Imaging > DCF Medical Application

If needed, drag and drop the supporting document(s) to their appropriate document type(s). Once everything is correct, click the **Submit** icon on the bottom of the screen.

The screenshot shows the ImageNow Viewer interface for a document package. The left-hand pane displays a tree view of document types, with 'Application' and 'Resources' highlighted by red boxes. The central pane shows a document titled 'United America Bank Statement' for the month of March 2015. The document includes a header with the date 'MAR 20 2015' and 'KEES # 20003395', and a table of debits. The right-hand pane shows document properties, including 'Case Number' (20003395) and 'Case Name' (Hamish Washington). The bottom toolbar contains a 'Submit' icon, which is highlighted by a red box.

Date	Description	Subtractions
2-5	Electronified Check Home Mortgage Company 2307	375.00
2-10	Electronified Check Dillons 2308	150.00
2-15	Electronified Check City of Topeka 2309	55.00
2-17	Electronified Check Westar Energy 2309	75.00
2-19	Electronified Check Kansas Gas Service 2309	125.00

# Medical Eligibility: Imaging for DCF Support Staff

## Summary

We have just learned how to use Imaging for Medical Applications received at the DCF office that need to be routed to the Clearinghouse.

We also learned how to image a DCF application using the Non-Lobby process.

Next we will learn how to use In-Printing when a CAPP application is received.



## Agenda

- Lesson 1: KEES Business Process
- Lesson 2: ImageNow Basics
- Lesson 3: Imaging
- **Lesson 4: In Printing- CAPP Application**
- Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document





# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 4: IN Printing > CAPP Application

### **In Printer:**

- Utilize the ImageNow virtual printer to capture electronic documents into ImageNow.
- Imports a document into ImageNow without printing and scanning first.
- Used for CAPP applications

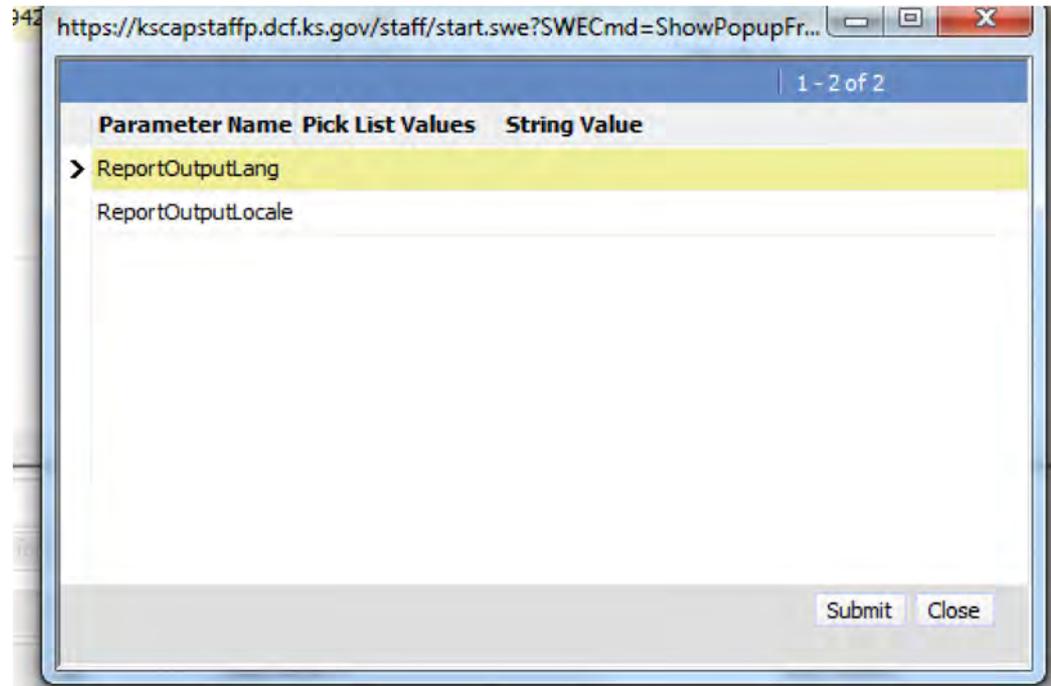
# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 4: IN Printing > CAPP Application

Case Name	Status	Case Number	AE Case #	KC Case #	New AE Case #	New KC Case #	Priority	Expedited	Date Received	Team	Source	AE Caseload #
> Sample, Caron E	Processed				✓	✓	10 - Expedited Food	✓	4/24/2012	RDICKMAN	Client Portal	west

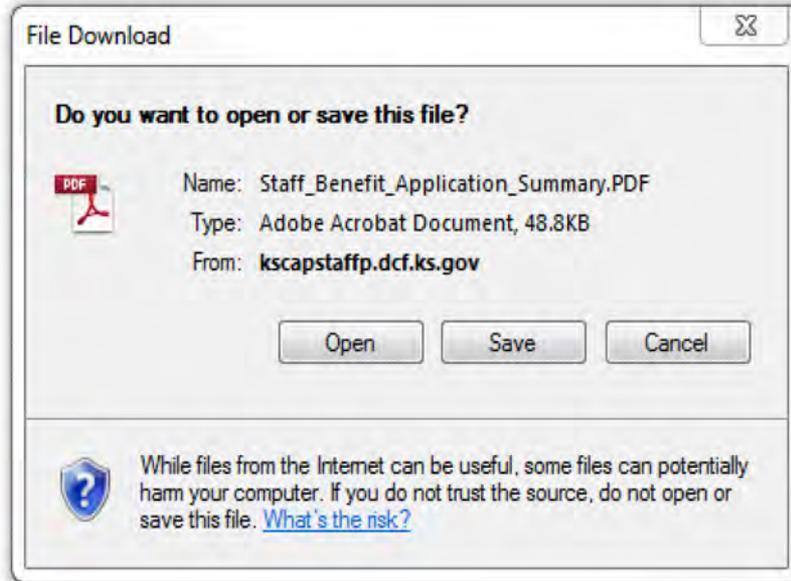
Access the CAPP system to pull up the application.

Click the **Submit** button.



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 4: IN Printing > CAPP Application



The **File Download** dialog box displays. Click **Open**. The image of the application displays.

**Kansas Department for Children and Families**  
**Application for Benefits**

Tracking Number: 1-10002361 Submitted Date/Time: 04/24/2012 08:59:42 Received Date: 04/24/2012	<b>Agency Use Only</b> Date Interviewed: _____ Worker: _____ Case Number(s): AE- _____ KC - _____ Expedited: Yes
--	---

**For which programs are you applying?**

Food Assistance   
  Cash Assistance   
  Child Care Assistance

**Expedited Service**

If you answer yes to any of the questions below, you may qualify for expedited service. If you qualify for expedited service, you may be able to get you food assistance benefits within 7 days. Expedited benefits cannot be issued until an interview is conducted and you have provided proof of your identity.

Is your total household income this month, before deductions less than \$150 and household cash/savings \$100 or less?  
No

Are your total shelter costs (rent/mortgage and utilities) more than your monthly income and resources?  
Yes

Are any members of your household migrant or seasonal farm workers whose cash and savings are \$100 or less?  
No

Applicant Information	
Name: Caron E Sample	Address Same: Yes
Street Address: 123 North Street, Apt 2	Mailing Address:
City, State, Zip: Topeka, KS 66612	City, State, Zip:
County:	Marital Status: Divorced
Home Phone: 7855551919	Email: _____
Work Phone:	Spoken Language: English
Cell Phone:	Written Language: English
Other Media: None	School District: 437

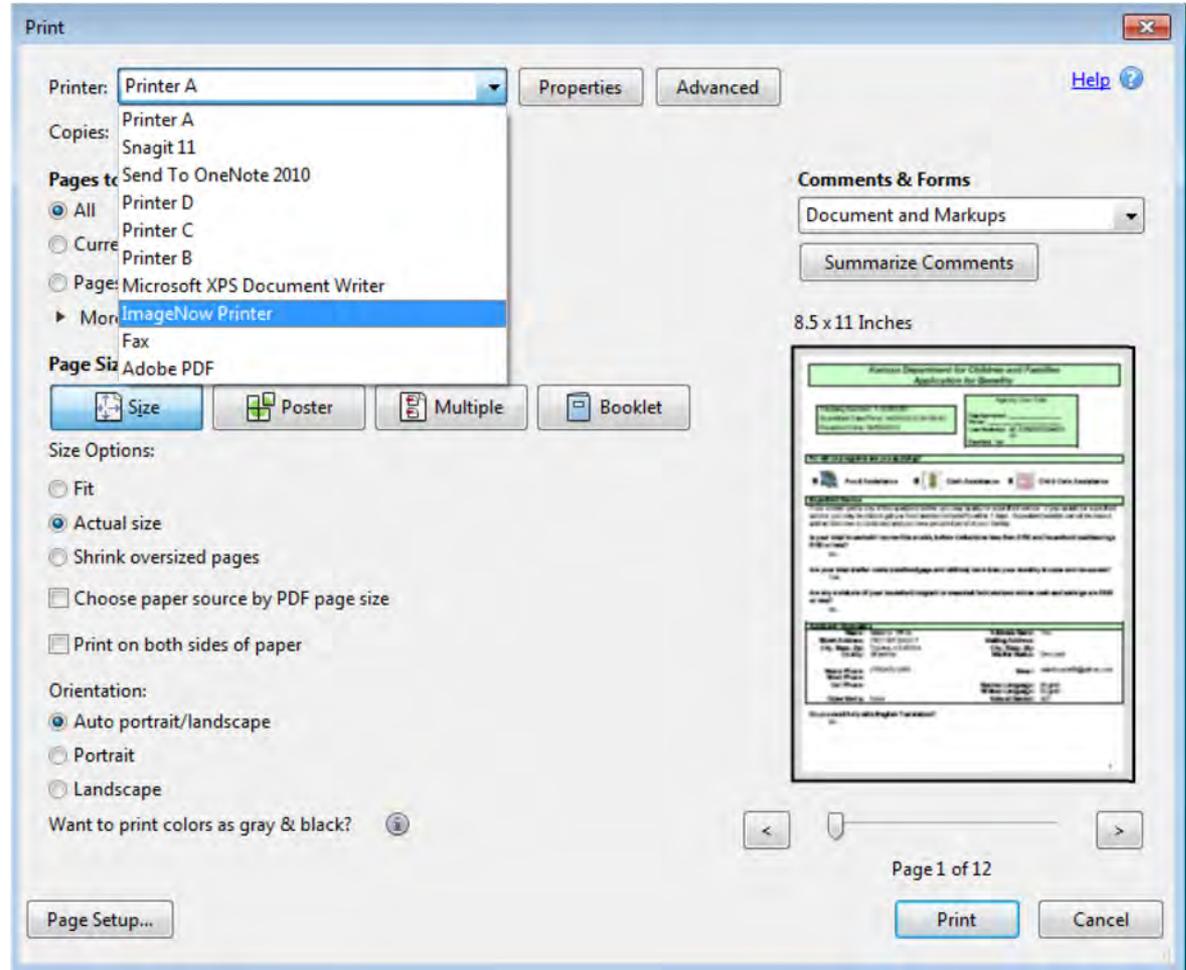
Do you need help with English Translation?  
No



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 4: IN Printing > CAPP Application

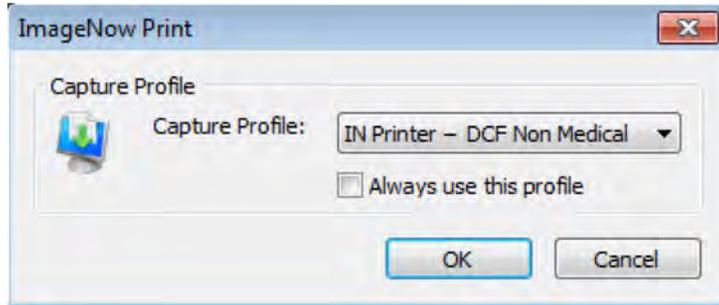
A worker will need to change their printer to “ImageNow Printer” and then click the **Print** button on the bottom of the page.





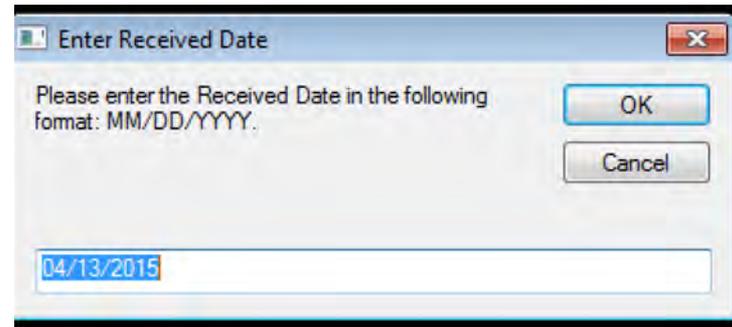
# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 4: IN Printing > CAPP Application



The Capture Profile dialog box will display. Choose “IN Printer- DCF Non Medical” from the menu drop-down and click the **OK** button.

The **Enter Received Date** dialog box will display with the current date populated. Update the date to the received date as applicable.



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 4: IN Printing > CAPP Application

**Proposed Keys**

Document Keys

Drawer: KEES DCF Non Medical

Case Number: 20000652

Case Name: Caron E Sample

Field 3:

Received Date: 04/13/2015

Unique ID: 301YZ4E\_00CXT8BBP00004F

Document Type: Application

Notes:

Capture Cancel

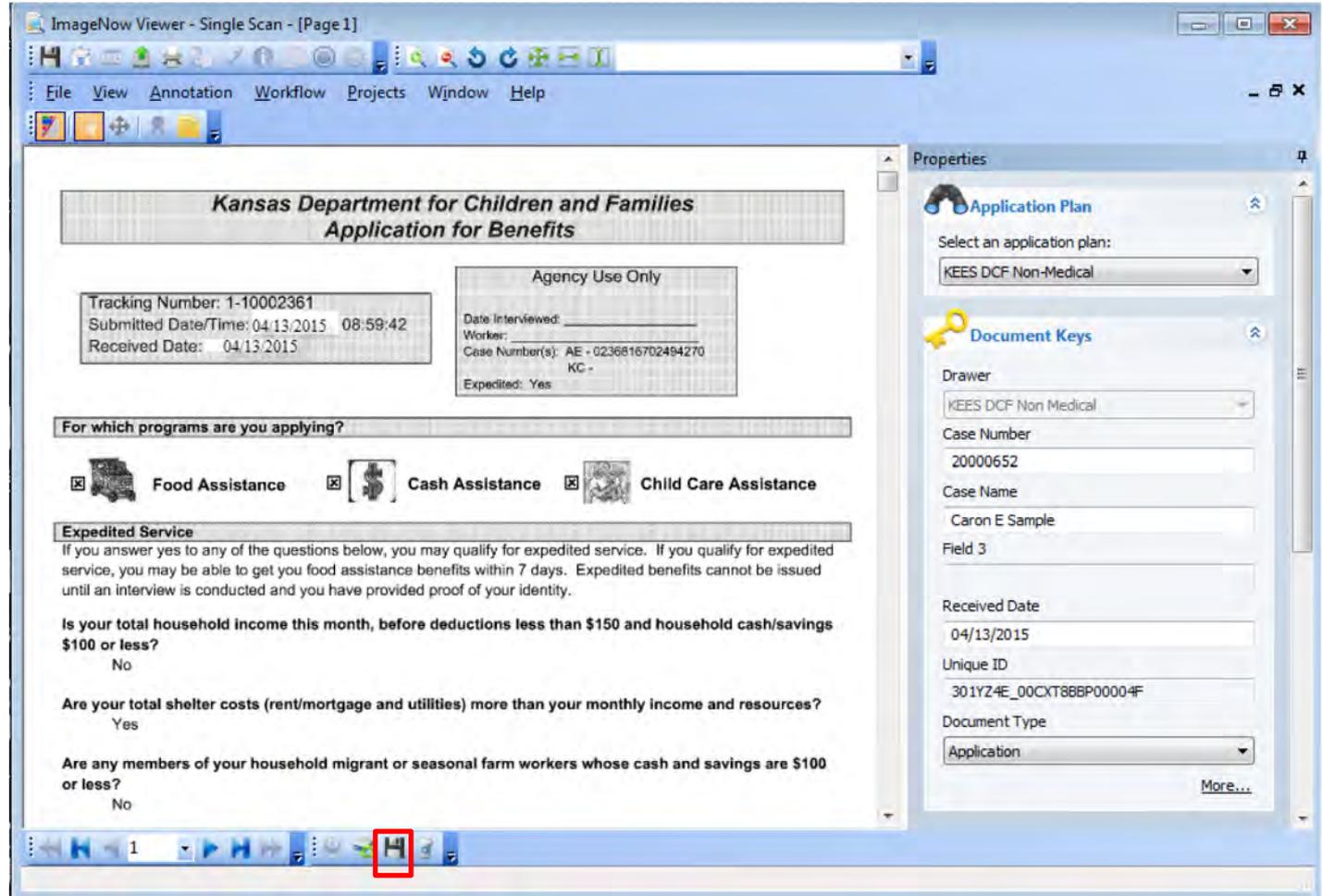
The **Proposed Keys** dialog box displays. Enter the Case Number and Case Name. Chose “Application” from the Document Type drop-down menu.

Click the **Capture** button.

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 4: IN Printing > CAPP Application

The image displays in the **ImageNow Viewer**. The worker will QA the documents and if satisfied with the image(s), will click the **Submit** icon.



# Medical Eligibility: Imaging for DCF Support Staff

## Summary

We have just learned how to use the IN Printer mode to capture a CAPP application.

Now we will look at 2<sup>nd</sup> level indexing for PII (Personal Identifying Information) on medical cases and copying a document.



## Agenda

- Lesson 1: KEES Business Process
- Lesson 2: ImageNow Basics
- Lesson 3: Imaging
- Lesson 4: IN Printing- CAPP Application
- **Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document**



### 2<sup>nd</sup> Level Indexing:

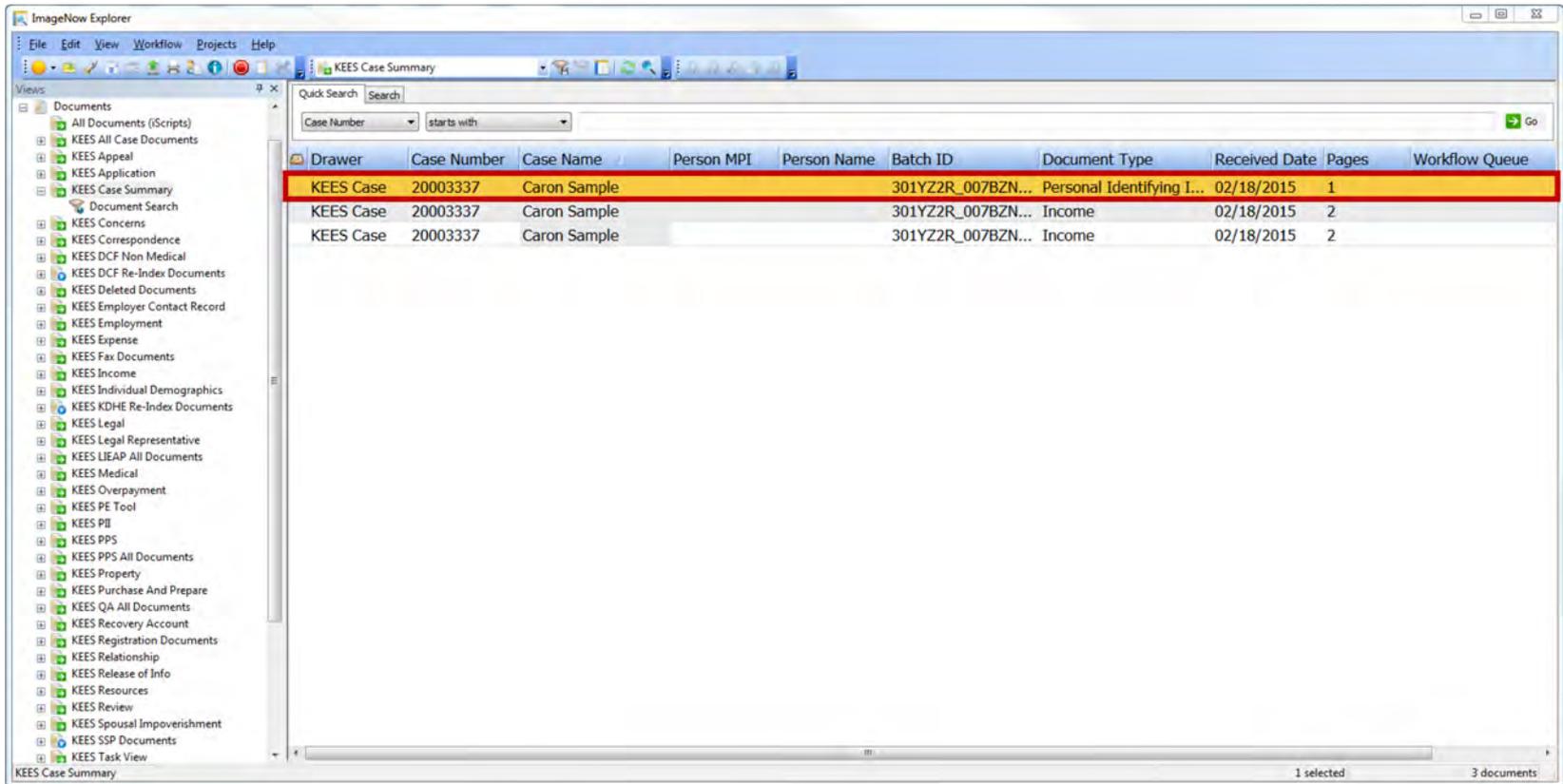
- Required for documents containing Personal Identification Information
- These documents are applicable to multiple cases and deemed “durable and portable”
- Can only be completed on Medical cases.



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document > 2<sup>nd</sup> Level Indexing

Select the PII document by double clicking on the designated line. Image will display in the ImageNow viewer.



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document > 2<sup>nd</sup> Level Indexing

The screenshot shows the ImageNow Viewer application window. On the left, a scanned image of a Kansas Driver's License is displayed. The license includes the following information:

- KANSAS DRIVER'S LICENSE**
- DOB: 11/15/1966
- SAMPLE CARON ELIZABETH, SR
- 6123 NORTH STREET, APT-2, TOPEKA, KS 66612-1234
- DL NO: K12-34-5678
- ISS: 11/15/2012, EXP: 11/15/2016
- DL CLASS: A
- ENG: NONE, REST: NONE
- SEX: F, HGT: 5'-06", WGT: 140 LB, EYES: BRO
- 11151966, DD 61234567896, SC123456789AB, ORGAN DONOR

On the right, the KEES Indexing eForm interface is shown. It includes the following fields and options:

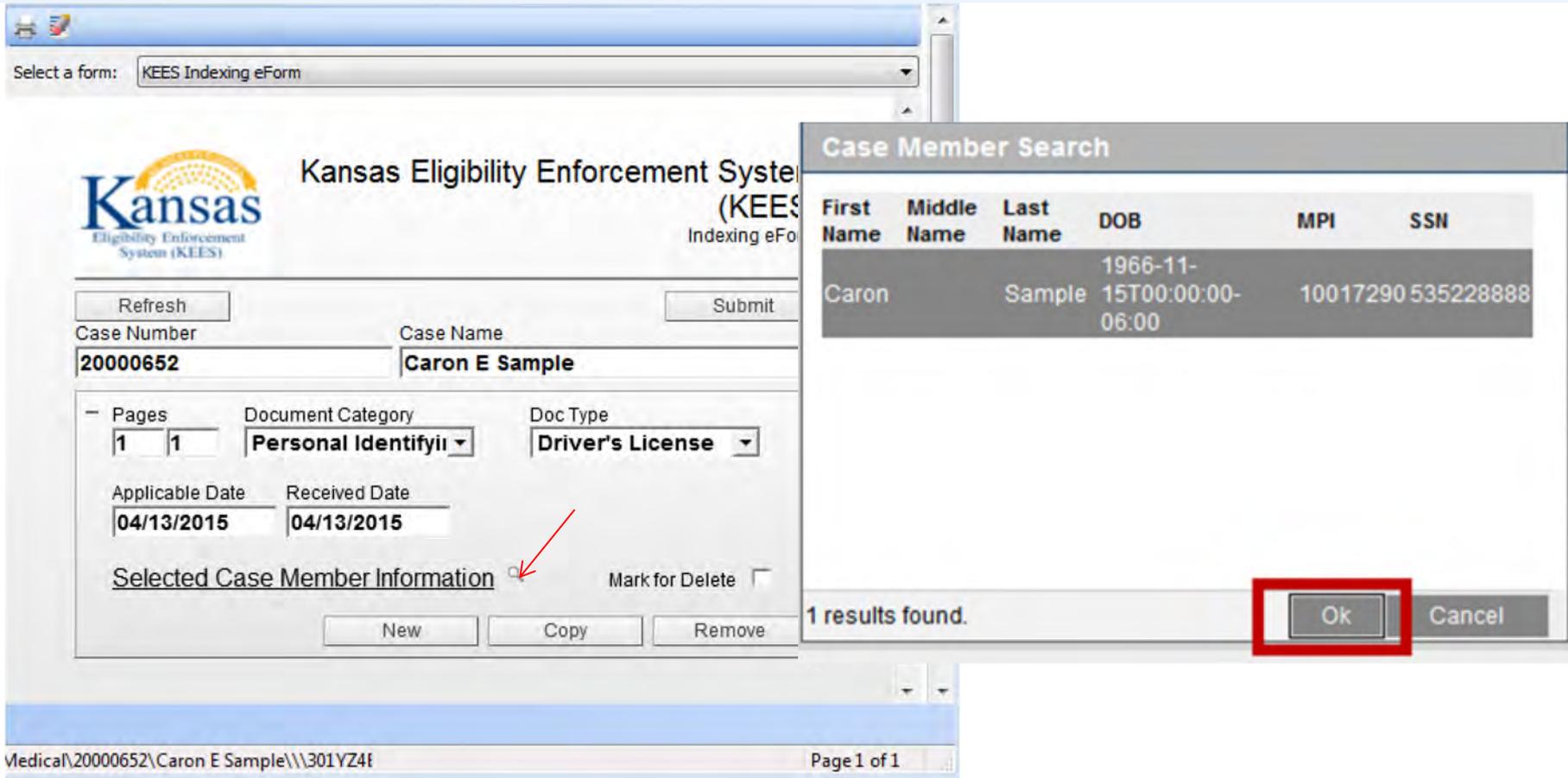
- Forms:** Select a form: KEES Indexing eForm
- Refresh** and **Submit** buttons
- Case Number:** 20000652
- Case Name:** Caron E Sample
- Pages:** 1 / 1
- Document Category:** Personal Identifi...
- Doc Type:** Driver's License
- Applicable Date:** 04/13/2015
- Received Date:** 04/13/2015
- Selected Case Member Information** (with a search icon)
- Mark for Delete** checkbox
- New**, **Copy**, and **Remove** buttons

The status bar at the bottom of the window displays: KEES DCF Non Medical\20000652\Caron E Sample\301Y24f Page 1 of 1

The image displays. Click **F12** for the Index eForm to display. Select the appropriate values for the document from the **Document Category** and **Doc Type** drop-down menus.

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document > 2<sup>nd</sup> Level Indexing



Select a form: KEES Indexing eForm

**Kansas** Eligibility Enforcement System (KEES) Indexing eForm

Refresh Submit

Case Number: **20000652** Case Name: **Caron E Sample**

Pages: 1 / 1 Document Category: **Personal Identifi...** Doc Type: **Driver's License**

Applicable Date: **04/13/2015** Received Date: **04/13/2015**

Selected Case Member Information  Mark for Delete

New Copy Remove

1 results found.

**Ok** Cancel

First Name	Middle Name	Last Name	DOB	MPI	SSN
Caron		Sample	1966-11-15T00:00:00-06:00	10017290	535228888

Medical\20000652\Caron E Sample\301YZ4f Page 1 of 1

Click on the Magnifying Glass to search for the case member information. **Case Member Search** page displays. Select the correct member and then click the **OK** button.



# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document > 2<sup>nd</sup> Level Indexing

Forms

Select a form:

**Kansas** Eligibility Enforcement System (KEES) Indexing eForm

Refresh

Case Number:  Case Name:

Pages:   Document Category:  Doc Type:

Applicable Date:  Received Date:

Selected Case Member Information  Mark for Delete

Name:	Date of Birth:	MPI:
Sample, Caron	1966-11-15T00:00:00-06:00	10017290

Click the **Submit** button. The Message from webpage dialog box will display. Click the **OK** button.

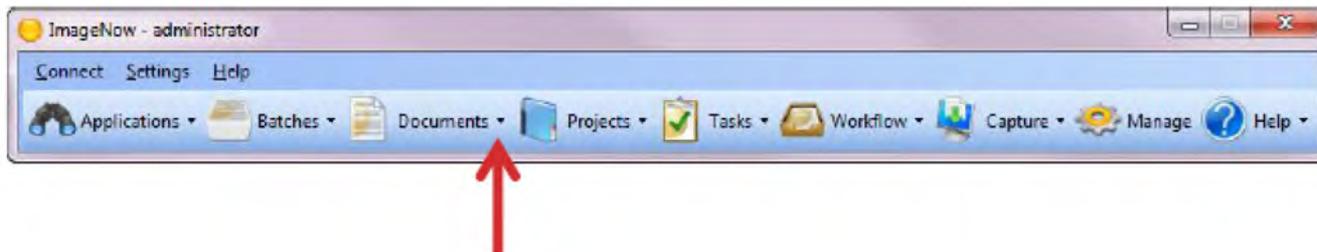
Message from webpage

Are you sure you want to route this document forward in workflow to the KEES Doc Reindex queue?

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document > Retrieve

Once an image has been indexed, it can be re-indexed to another case (e.g. Non-Medical case).



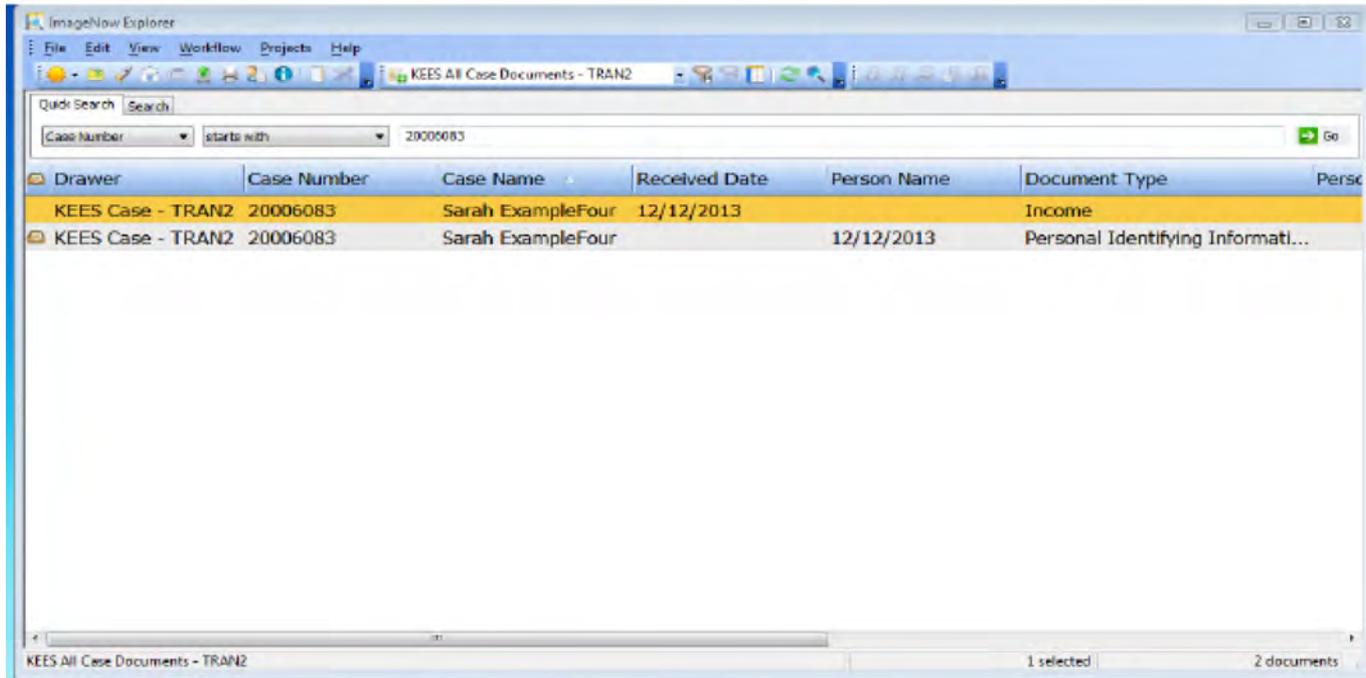
Click on **Documents** to retrieve all documents stored in ImageNow. Document View allows the user to search for documents that are within a specific, pre-determined criteria and/or security group.

### Document View Filters:

- KEES All Case Document- KEES Case related documents
- KEES Deleted Documents- Deleted documents performed by the KEES Indexing eForm
- KEES Fax Documents- Faxed documents
- KEES LIEAP All Documents- KEES Case LIEAP related documents
- KEES QA All Documents- KEES QA related documents
- KEES Registration Documents- KEES Case Registration related application documents
- KEES DCF Non-Medical- DCF Non-Medical related documents
- KEES TOP All Documents- KEES TOP related documents
- KEES Task View- KEES Tasks related documents for processing
- KEES Unknown Case Drawer- KEES documents that were not identified to a KEES Case at the point of capture
- KEES PPS All Documents- KEES PPS documents
- KEES DCF Re-Index Documents- DCF documents that require Re-indexing to the appropriate case
- KEES KDHE Re-Index Documents- KDHE documents that require Re-indexing to the appropriate case
- KEES SSP Documents- SSP submitted documents that require indexing to the appropriate document type and/or KEES Case.

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document > Locate Document



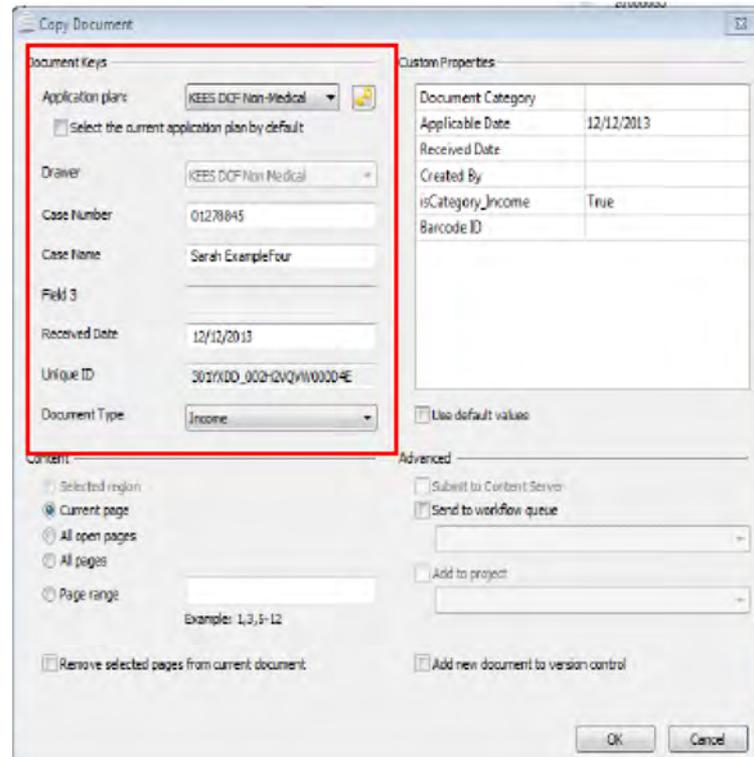
Using ImageNow Document Search, **KEES All Case Document** document view, locate documents imaged to the KEES case. Enter the KEES case number and click **Go**. From ImageNow Explorer, open income **Document Type** by double clicking on the document.

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document > Copy

If the document needs associated to a Non-Medical case, **Copy** document to the Non-Medical drawer by using **File** on the ImageNow Viewer, then **Copy Document**.

- Change Application Plan to KEES DCF Non-Medical.
- If already selected, a worker MUST reselect the value.
- Enter Received date.
- Paste KAECSSES case# .
- Verify Case Name.
- Verify appropriate Document Type.
- Select OK.
- Close ImageNow Viewer to return to ImageNow Explorer.
- Employment Verification form has been copied to the Non-Medical income drawer.



**Copy Document**

**Document Keys**

Application plan: KEES DCF Non-Medical

Select the current application plan by default

Drawer: KEES DCF Non Medical

Case Number: 01278845

Case Name: Sarah ExampleFour

Field 3:

Received Date: 12/12/2013

Unique ID: 3021YID0\_002HQVW00004E

Document Type: Income

**Custom Properties**

Document Category	
Applicable Date	12/12/2013
Received Date	
Created By	
isCategory_Income	True
Barcode ID	

Use default values

**Content**

Selected region

Current page

All open pages

All pages

Page range:  Example: 1,3,5-12

Remove selected pages from current document

**Advanced**

Submit to Content Server

Send to workflow queue

Add to project

Add new document to version control

OK Cancel

# Medical Eligibility: Imaging for DCF Support Staff

## Lesson 5: 2<sup>nd</sup> Level Indexing/Copy a Document > Locate and View

ImageNow Explorer

File Edit View Workflow Projects Help

KEES All Case Documents

Quick Search Search

Case Number starts with 5006781 Go

Drawer	Case Number	Case Name	Person MPI	Person Name	Batch ID	Document Type	Received
KEES DCF Non ...	5006781	Bolton			301YX8W_00157...	Application	08/26/...
KEES DCF Non ...	5006781	Orville Bolton		9/25/2013	301YX9S_001Y5...	Income	
KEES DCF Non ...	5006781	Orville Bolton		9/25/2013	301YX9S_001Y5...	Income	

Use sorting ▲ to sort column results.

Click on the document to view.

# Medical Eligibility: Imaging for DCF Support Staff

## Summary

- We have just learned how to index to the 2<sup>nd</sup> level for personal identification information on medical cases.
- We have also looked at how to locate, retrieve and copy a document.



## Wrap up

In this course you learned:

- KEES Business Processes related to Imaging
- ImageNow basics
- Imaging related to applications received at the DCF office needing to be routed to the Clearinghouse & for DCF application received through the Non-Lobby Process
- IN-Printing for CAPP Applications
- Indexing for PII and how to locate, retrieve and copy a document

QUESTIONS?

