



# Medical Eligibility

## Imaging for Workers



This course will provide DCF workers with an overview of the fundamentals of imaging, as well as explain the business process as it relates to the Imaging Solution for Case Workers.

After completing this course, you will be able to:

- Identify 'Hot' or 'Cold' documents
- Capture documents
- Perform imaging duties (tasks) related to your role
- Sort and View documents through the KEES Indexing eForm
- Indexing to the person level
- Troubleshoot Issues



- **Lesson 1: What is Imaging?**
- Lesson 2: Sorting Documents
- Lesson 3: ImageNow Fundamentals
- Lesson 4: Document Processing
- Lesson 5: Document Management
- Lesson 6: Troubleshooting



# Imaging: DCF

## Lesson 1: What is Imaging? > Introduction

This lesson will provide DCF workers with an overview of the KEES Imaging Solution and how it affects their day-to-day processes.



After completing this lesson, you will be able to:

- Describe the benefits of the KEES Imaging Solution
- Define, at high-level, some of the new terms



# Imaging: DCF

## Lesson 1: What is Imaging > Enterprise Content Management

### ImageNow

- Ensures that all documents are secure, quickly retrievable, and associated to the files and application plans you want.
- Captures and manages data from:
  - SSP
  - Loose Mail
  - Email, MS Office or PDF (electronic)
- Gives workers the ability to view, scan, process and search for documents.







# Imaging: DCF

## Lesson 1: What Is Imaging? > Imaging Processes

Imaging allows KEES users to scan documents and process images electronically. It gives users the ability to store and retrieve case and person related documents electronically and view the stored images online from within the KEES System.

The imaging process has three main functions.

1. Capture the document
2. Review the document
  - a. Store
3. Retrieve the document
  - a. Copy
  - b. Re-Index



# Imaging: DCF

## Lesson 1: What Is Imaging? > Speaking the Language

### Capture

- The ability to scan or import documents in to the Imaging Solution and store documents in the ImageNow

### Review

- Reviewing image quality (readable) and assigning index values
- Ensuring the correct document was captured and indexed to the right case, no documents were missed, etc.

### Retrieve

- The ability to search and retrieve a document inside of the KEES system
- The ability to search and retrieve a document inside of ImageNow Explorer

# Imaging: DCF

## Lesson 1: What Is Imaging? > Speaking the Language

### Indexing

- Applying values (ex. Case Number, Case Name, Received date) to the document to categorize images in the appropriate folders/cases
- Two Types of Indexing
  - Automatically
  - Manual

### Indexing eForm

- Allows staff to enter additional indexing information, re-index documents and correct any indexing mistakes
- Can be used on documents associated to a KEES case number
- Index a document to a specific person
- Re-index the document to a different case number



# Imaging: DCF

## Lesson 1: What Is Imaging? > Speaking the Language

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

### Person level

- The document follows the person from case to case
- This includes personal identifying documents
  - Birth Certificate
  - Driver's License
  - Social Security Card

### Case level

- The documents doesn't follow the person from case to case
- This includes general documents
  - Landlord Letter
  - Paycheck Stubs

# Imaging: DCF

## Lesson 1: What Is Imaging? > Capture Profiles

### Package Mode

- Allows an individual to scan several types of documents for the same case at one time.
- DCF will always be using this mode when capturing physical documents.

### IN Printer

- Utilize the ImageNow virtual printer to capture electronic documents into ImageNow.
- Imports a document, from Microsoft Office or email, into ImageNow without printing and scanning first.

# Imaging: DCF

## Lesson 1: What Is Imaging? > Summary

In Lesson 1 we have looked at:

- Benefits of the KEES Imaging Solution
- High level definitions of some new terms



- Lesson 1: What is Imaging?
- **Lesson 2: Sorting Documents**
- Lesson 3: ImageNow Fundamentals
- Lesson 4: Document Processing
- Lesson 5: Document Management
- Lesson 6: Troubleshooting



# Imaging: DCF

## Lesson 2: Sorting Documents > Introduction

This lesson will provide DCF workers with the lobby and non-lobby processes. We will also define the steps required prior to the beginning of the imaging process.

After completing this lesson, you will learn:

- Hot versus Cold document processing
- Lobby process and cover sheet
- Non-lobby process
- Why we use the Unknown drawer



# Imaging: DCF

## Lesson 2: Sorting Documents > COLD Documents

What is COLD?

- Case Information that requires no further action
  - For example, supporting documentation from a lobby interview where the worker processed the case, historical documents, and/or file only documentation.
  
- Documents must be imaged within 3-5 days of receipt
  
- All PPS documents will be imaged after a program has been processed.



### What is HOT?

- An application received through the lobby that does not have an eligibility determination made by the worker
- Documents to be routed to the Clearinghouse
- Unworked or unprocessed document(s)
  - 24 hour turnaround
  - Must be imaged same day – no later than the next day
- Documents received via non-lobby



# Imaging: DCF

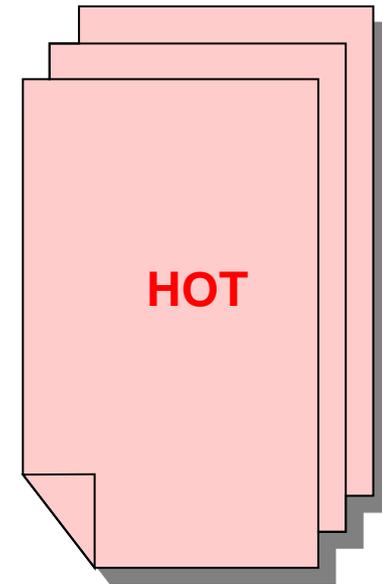
## Lesson 2: Sorting Documents > HOT Documents

### Example:

A consumer submits separate applications for medical and non-medical coverage through the lobby.

The medical application didn't meet the Big 4 criteria so it is routed to the Clearinghouse (making the application a hot scan). A determination was made on the non-medical case.

Since part of the application is prioritized as hot, the whole application is prioritized as such.



Medical Application



# Imaging: DCF

## Lesson 2: Sorting Documents > Lobby Process

- Claim client from the assigned BPM Lobby Tracker
- Date Stamp the paper application
- Register program if applicable to the appropriate KAECSES and/or KEES system
- Follow the process management principles
- Eligibility determination has been completed
- Update the appropriate BPM Tracker with case status
- Complete the coversheet for Imaging
- Place documents in the basket (Cold or Hot)



# Imaging: DCF

## Lesson 2: Sorting Documents > Lobby Process

| LOBBY IMAGING TRACKING SHEET – PACKAGE MODE  |  |  |
|--|--|--|
| 10-24-2014   |  |  |
| <p><u><b>KAECSES</b></u><br/>Case Head:<br/><br/>Case #:</p>   | <p><u><b>KEES</b></u><br/>Case Head:<br/><br/>Case #:</p>  | <p><u><b>KSCares</b></u><br/>Case Head:<br/><br/>Case #:</p> |
| <p><u><b>PRIORITY:</b></u><br/> <input type="checkbox"/> HOT<br/> <input type="checkbox"/> COLD<br/> <i>Outstationed Workers Only:</i><br/> <input type="checkbox"/> Ready for 60 Day Retention</p>  | <p><u><b>AGENCY:</b></u>      <i>**Image medical before non-medical**</i><br/> <input checked="" type="checkbox"/> DCF<br/> <input type="checkbox"/> DCF Non-Medical<br/> <input type="checkbox"/> KEES Case<br/> <input checked="" type="checkbox"/> Clearinghouse<br/> <input type="checkbox"/> KEES New Application</p>   |  |
| <p><u><b>DCF Document Types:</b></u><br/> <input type="checkbox"/> Application<br/> <input type="checkbox"/> IR<br/> <input type="checkbox"/> Non-Medical Review<br/> <input type="checkbox"/> Review <i>*Medical</i><br/> <input type="checkbox"/> Work Programs<br/> <input type="checkbox"/> Loose Mail<br/> <i>*Index to appropriate document type</i></p> | <p><u><b>Clearinghouse Document Types:</b></u><br/> <input type="checkbox"/> Expedited PW KanCare Application<br/> <input type="checkbox"/> KanCare Application<br/> <input type="checkbox"/> Potential CH Application <i>*Route back to DCF</i><br/> <input type="checkbox"/> Unsigned CH Application<br/> <input type="checkbox"/> Urgent Need KanCare Application<br/> <input type="checkbox"/> 3100/3100.1 EXP PW Application<br/> <input type="checkbox"/> 3100/3100.1 Medical Application<br/> <input type="checkbox"/> 3100/3100.1 Urgent Medical Application</p> |  |

# Imaging: DCF

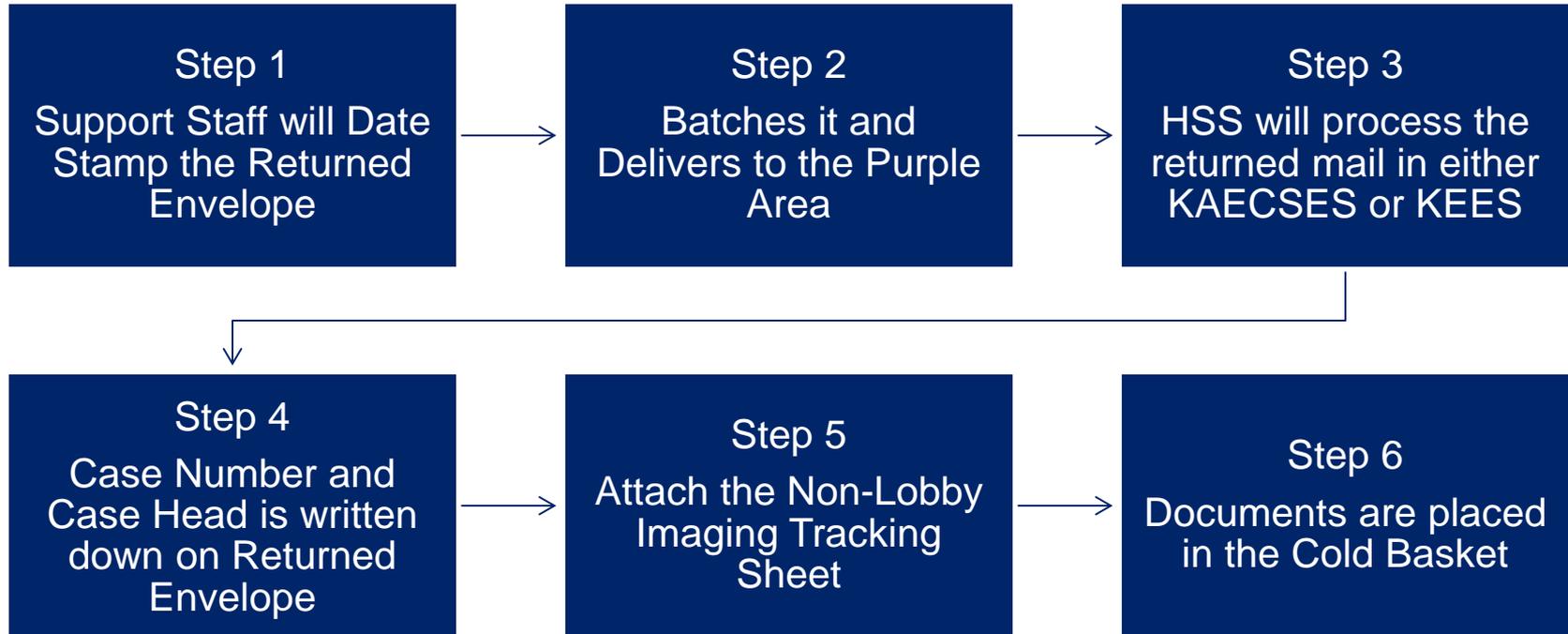
## Lesson 2: Sorting Documents > Non-Lobby Process

- Claim client from the assigned BPM Non-Lobby Tracker
- Retrieve Document from ImageNow or within the KEES system
- Follow the process management principles
- Eligibility determination has been completed
- Update the appropriate BPM Non-Lobby Tracker with case status



# Imaging: DCF

## Lesson 2: Sorting Documents > Returned Mail



### Document Types

- Returned mail-in state
- Returned mail-out of state
- Returned mail-no forwarding address
- Returned mail-no forwarding address PR letter



# Imaging: DCF

## Lesson 2: Sorting Documents > Unknown Drawer

### **The UNKNOWN Drawer**

DCF is going to allow Eligibility Workers to look in the drawer and re-index “unknown” documents as needed.

Workers will need to search with a location since the UNKNOWN drawer is Statewide.

Each office is to designate 1 person to manage and routinely clean-up the drawer as well.

In Lesson 2, you learned:

- Hot versus Cold document processing
- Lobby & Non-Lobby processes and cover sheet
- Why we use the Unknown drawer



- Lesson 1: What is Imaging?
- Lesson 2: Sorting Documents
- **Lesson 3: ImageNow Fundamentals**
- Lesson 4: Document Processing
- Lesson 5: Document Management
- Lesson 6: Troubleshooting





# Imaging: DCF

## Lesson 3: ImageNow Fundamentals > Introduction

This lesson will provide DCF workers the basic ImageNow navigation.

After completing this lesson, you will learn:

- How to sign-in to ImageNow
- Toolbar functionality within ImageNow

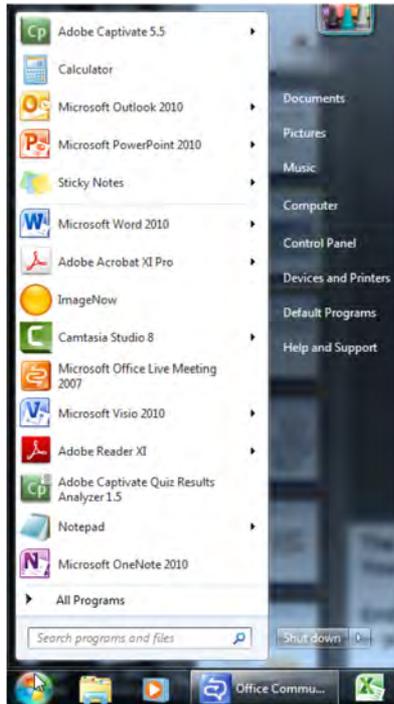
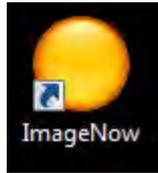




# Imaging: DCF

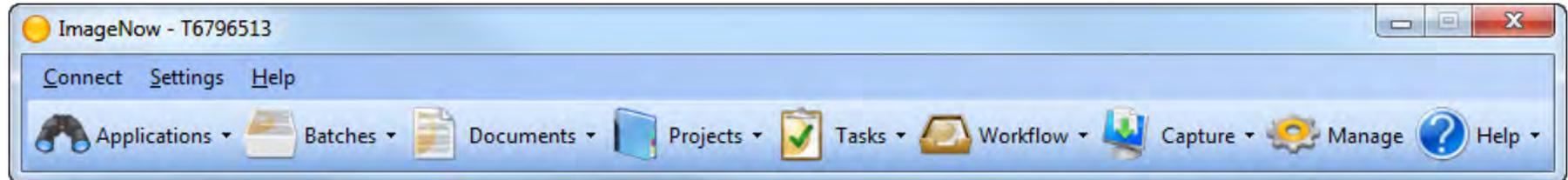
## Lesson 3: ImageNow Fundamentals > Icon and Login

### Launch ImageNow



### To Log-In to ImageNow

- > KEES Username
- > Password



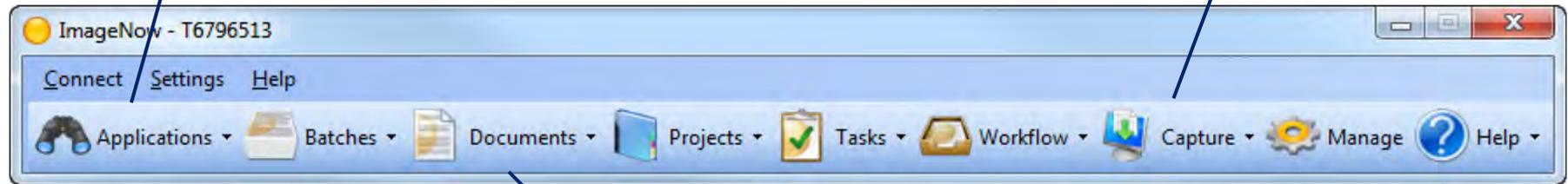
### ImageNow Toolbar

- > Easy Access to All ImageNow Software
- > Configured to Users' Business Role



# Imaging: DCF

## Lesson 3: ImageNow Fundamentals > Toolbar



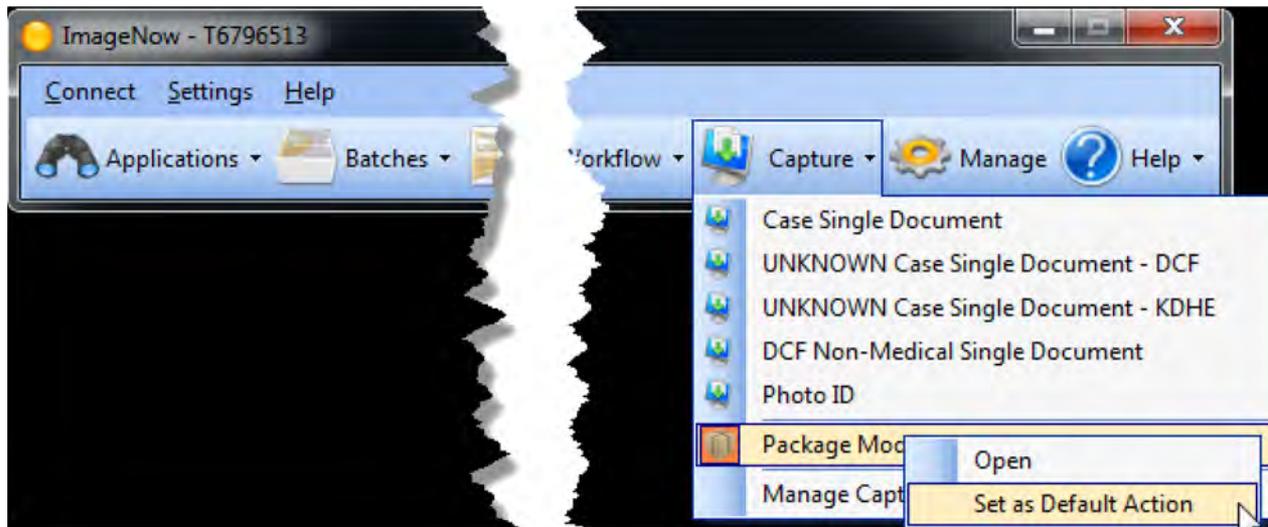


# Imaging: DCF

## Lesson 3: ImageNow Fundamentals > Settings

### Setting “Default” Capture Profile & Application Plan

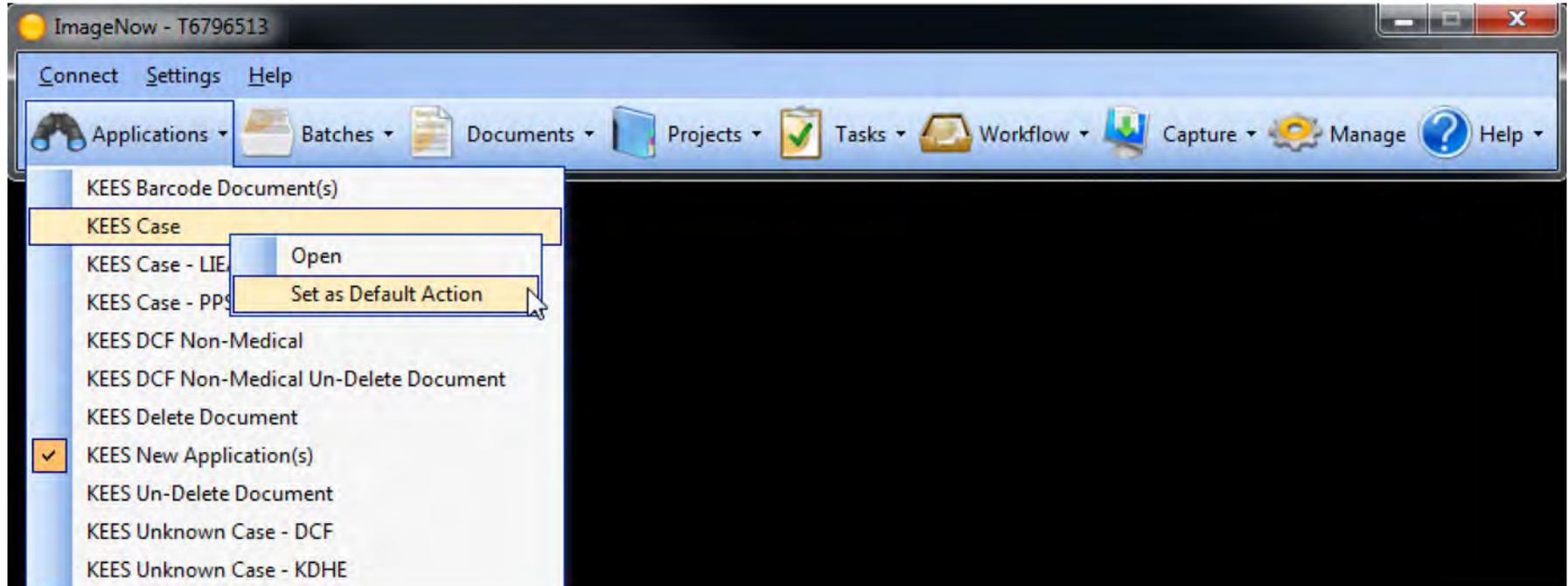
A user needs to set the appropriate default Capture Profile and Application Plan to help make document capture most efficient.





# Imaging: DCF

## Lesson 3: ImageNow Fundamentals > Settings



In Lesson 3, you learned:

- Three different locations you can access the ImageNow icon
- How to sign-in into ImageNow
- Basic functionality of the Toolbar
- How to set the appropriate default Capture Profile and Application Plan



- Lesson 1: What is Imaging?
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# Imaging: DCF

## Lesson 4: Document Processing > Introduction

This lessons provides users with a detailed understanding of key imaging and storing processes in relation to business practices found within the KEES Imaging System.



After completing this lesson, you will learn:

- Imaging definitions
- The two ways to capture
- Capturing Applications and Supporting Documents
- IN Printer process

# Imaging: DCF

## Lesson 4: Document Processing > Capturing a Document

There are two ways of capturing a document

- Physical Capturing
  - Placing the physical documents in the scanner
- Electronic Capturing
  - The ability for electronic documents to be captured via the Image Now (IN Printer)

Capture Profile is a reusable collection of settings that designates the manner of capture via a scanner or virtual printer.

- Different types of documents or business processes require slightly different settings
- Allows users to select the right settings for each specific need



# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

Capture Profiles are classified by mode and type

- Mode
  - Single Mode
  - Package Mode
- Type
  - Scanner Capture Profiles
  - ImageNow Print Capture

ImageNow stores mapped information in a container called an Application Plans. These containers store information used to assign drawer, basket, document key, and custom property values to captured documents.

Therefore, the ImageNow Capture Profiles works together with the Application Plans to index documents.



# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

KEES Imaging Solution uses two types of Application Plans

- LearnMode
  - Linked to pages within KEES to extract data for the designated index values.
  
- Manual
  - Requires the user to populate the designated indexing value by typing each value.



# Imaging: DCF

## Lesson 4: Document Processing > Application Plans

### LearnMode Application Plan

| Application Plan | Description  | Indexing Fields   | When to use   | Document Examples   |
|------------------|--|---|---|---|
| KEES Case        | To index documents to case information. The KEES Case Summary page will be leveraged to pull and index case level indexing values. | <ul style="list-style-type: none"> <li>• Case Number</li> <li>• Case Name</li> <li>• Received Date</li> <li>• Unique ID</li> <li>• Document Type</li> </ul> | Use on any document tied to a medical program and the Case Number is known. | Registered E&D Applications<br>E&D Reviews<br>Returned Mail<br>Medical Loose Mail |



# Imaging: DCF

## Lesson 4: Document Processing > Application Plans

### LearnMode Application Plan

| Application Plan | Description  | Indexing Fields   | When to use  | Document Examples  |
|------------------|--|---|--|--|
| KEES Case - PPS  | To index PPS documents to case information. The KEES Case Summary page will be leveraged to pull and index case level indexing values. | <ul style="list-style-type: none"> <li>• Case Number</li> <li>• Case Name</li> <li>• Received Date</li> <li>• Unique ID</li> <li>• Document Type</li> </ul> | Use on any document related to a PPS medical program and the Case Number is known. | <ul style="list-style-type: none"> <li>• PPS Forms</li> <li>• PPS Legal Documents</li> <li>• Personal Identifying Information</li> </ul> |



# Imaging: DCF

## Lesson 4: Document Processing > Application Plans

### Manual Application Plan

| Application Plan        | Description  | Indexing Fields  | When to use   | Document Examples  |
|-------------------------|--|--|---|--|
| KEES New Application(s) | To index new Applications that do not have a KEES Case number yet. | <ul style="list-style-type: none"> <li>• IN Application ID</li> <li>• Last Name</li> <li>• Received Date</li> <li>• Batch ID</li> <li>• Document Type</li> </ul> | Always use the “KEES New Application(s)” application plan when imaging unregistered applications or when routing an application to the Clearinghouse. | <ul style="list-style-type: none"> <li>• Unregistered Medical or Non-Medical Applications.</li> <li>• Applications routed to the Clearinghouse.</li> </ul> |



# Imaging: DCF

## Lesson 4: Document Processing > Application Plans

### Manual Application Plan

| Application Plan     | Description                        | Indexing Fields   | When to use   | Document Examples   |
|----------------------|------------------------------------|---|---|---|
| KEES DCF Non-Medical | To index DCF Non Medical Document. | <ul style="list-style-type: none"> <li>• Case Number</li> <li>• Case Name</li> <li>• Received Date</li> <li>• Unique ID</li> <li>• Document Type</li> </ul> | On any document tied to a non-medical program and the Case Number is known. | <ul style="list-style-type: none"> <li>• Registered Non-Medical Applications</li> <li>• Non-Medical Review</li> <li>• IR</li> <li>• Returned Mail</li> <li>• Non-Medical Loose Mail.</li> </ul> |



# Imaging: DCF

## Lesson 4: Document Processing > Application Plans

### Manual Application Plan

| Application Plan        | Description   | Indexing Fields  | When to use  | Document Examples |
|-------------------------|---|--|--|-------------------|
| KEES Unknown Case – DCF | To index DCF documents where KEES case number or KAECSES or KsCares Case number is unknown. | <ul style="list-style-type: none"> <li>• First Name</li> <li>• Last Name</li> <li>• SSN</li> <li>• Received Date</li> <li>• Fax Number/Email Address</li> <li>• Document Type</li> </ul> | Used when a document is received at a DCF Office and cannot be tied to a person and or Case. | Any document      |



# Imaging: DCF

## Lesson 4: Document Processing > Application Plans

### Manual Application Plan

| Application Plan         | Description  | Indexing Fields | When to use                                 | Document Examples |
|--------------------------|--|-----------------|---|-------------------|
| KEES Barcode Document(s) | To index KEES generated barcode documents (i.e. documents created with a KEES generated barcode that were been delivered to designated consumers and since returned to the state). | Document Type   | Any document with a KEES Generated Barcode. | Medical Review    |

# Imaging: DCF

## Lesson 4: Document Processing > IN Printer

| IN Printer                               | Definition   |
|--|--|
| <b>IN Printer – Case</b>                 | Documents that have a Case Number in KEES.   |
| <b>IN Printer – Case No Task</b>         | Documents that that have a Case Number in KEES. “No Task” will indicate that KEES will not trigger a task to be created for a user upon printing the document. |
| <b>IN Printer – PPS Case</b>             | PPS related documents that have a Case Number in KEES.   |
| <b>IN Printer – Unknown Case – DCF</b>   | DCF related documents that don’t have a Case Number in KEES.   |
| <b>IN Printer – Unknown Case – KDHE</b>  | KDHE related documents that don’t have a Case Number in KEES.  |
| <b>IN Printer – DCF Non-Medical</b>      | Non-medical related documents that are non-medical related documents and have a separate DCF managed Case Number.  |
| <b>IN Printer – UNKNOWN Case – LIEAP</b> | LIEAP related documents that don’t have a Case Number in KEES.   |



# Imaging: DCF

## Lesson 4: Document Processing > Using the IN Printer

### **Capture a Document using the ImageNow Printer**

As a worker you may be receiving emails that need to be saved to a KEES case. To do this, use the ImageNow IN Printer to capture the page and associate it to the designated case.

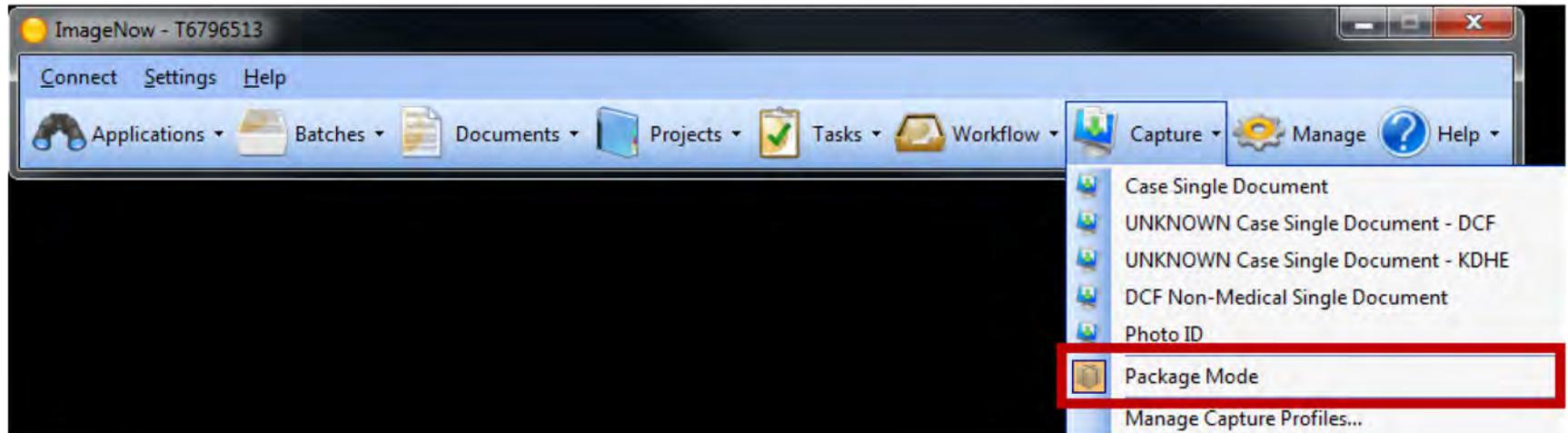
You must be logged into KEES system and the ImageNow before you begin these steps.



# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

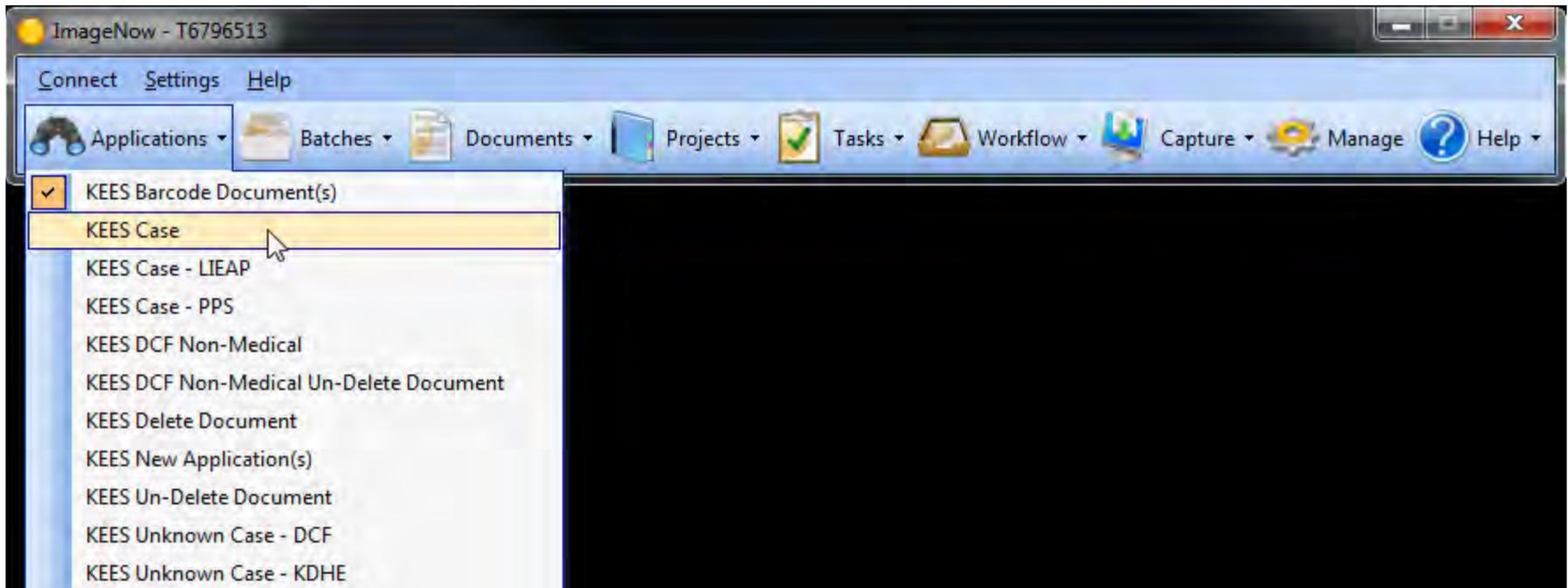
Check your Capture Profile to verify that it is set to Package Mode.



# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

Next, you should make sure your Applications Plan reflects KEES Case for this process.



# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

Next navigate to the appropriate case on the KEES Case Summary Page

**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 : 02/20/2015 03:30 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

**Person Search**

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

**Case Summary**

|  |   |                                      |
|--|---|--------------------------------------|
| <b>Case Name</b><br>Lindsay Ray                              | <b>Mailing Address</b><br>1216 WOODLAND ST<br>EMPORIA, KS 66801 | <b>County of Residence</b><br>Kansas |
| <b>Home Address</b><br>1216 WOODLAND ST<br>EMPORIA, KS 66801 |   |                                      |

**Companion Cases**

| Case Number                        | Case Name |
|------------------------------------|-----------|
| <input type="button" value="Add"/> |           |

**Display:**  
 04/01/2015

**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="#">DW5502G102</a>         | <b>Language:</b>                    | English     |
| <b>Program Status:</b> | Pending                            | <b>Phone Number:</b>                |             |



# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

Select your document from your inbox and open the document.

The screenshot shows an email client window with an open PDF document. The document contains two tables of financial data for 'EMPLOYEE' Lindsay Ray at 'UNEMPLOYER RESOURCE CENTER FOR INDEPENDENT LIVING, INC.'.

**Table 1: 120808**

|                     |                |              |        | Period End Date  | Pay Date   |       |
|---------------------|----------------|--------------|--------|------------------|------------|-------|
|                     |                |              |        | 01/28/15         | 01/31/2015 |       |
|                     | Current Period | Year To Date |        |                  |            |       |
| Regular             | 18,500.00      | 185,000.00   | 400.33 |                  |            |       |
| Night Support       | 0.0000         | 0.00         | 0.00   | Social Security  | 11.70      | 27.55 |
| Respite/Other       | 0.0000         | 0.00         | 0.00   | Federal Tax W/II | 4.65       | 7.14  |
| Add-To-Gross        | 0.00           | 0.00         | 0.00   | State Tax W/II   | 2.00       | 6.00  |
| Named Income Credit | 0.00           | 0.00         |        | Medicare         | 2.73       | 6.44  |
| <b>Current</b>      |                |              |        |                  |            |       |
|                     | Year to Date   |              |        |                  |            |       |
| Gross               | 185.00         |              |        | Gross            | 400.33     |       |
| Deductions          | 21.08          |              |        | Deductions       | 45.13      |       |
| Net                 | 163.92         |              |        | Net              | 355.20     |       |

**Table 2: 122427**

|                     |                |              |        | Period End Date  | Pay Date   |       |
|---------------------|----------------|--------------|--------|------------------|------------|-------|
|                     |                |              |        | 02/12/15         | 02/13/2015 |       |
|                     | Current Period | Year To Date |        |                  |            |       |
| Regular             | 23,500.00      | 235,000.00   | 633.33 |                  |            |       |
| Night Support       | 0.0000         | 0.00         | 0.00   | Social Security  | 14.65      | 42.20 |
| Respite/Other       | 0.0000         | 0.00         | 0.00   | Federal Tax W/II | 5.38       | 12.52 |
| Add-To-Gross        | 0.00           | 0.00         | 0.00   | State Tax W/II   | 3.00       | 7.00  |
| Named Income Credit | 0.00           | 0.00         |        | Medicare         | 3.42       | 9.86  |
| <b>Current</b>      |                |              |        |                  |            |       |
|                     | Year to Date   |              |        |                  |            |       |
| Gross               | 235.00         |              |        | Gross            | 633.33     |       |
| Deductions          | 26.45          |              |        | Deductions       | 71.58      |       |
| Net                 | 208.55         |              |        | Net              | 561.75     |       |



# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

Select File then Print.

The screenshot shows the Adobe Acrobat Pro interface. The 'File' menu is open, and the 'Print...' option is highlighted with a red box. The document content displays two pay stubs for SUNFLOWER RESOURCE CENTER FOR INDEPENDENT LIVING, INC. EMP1001, Lindsay Ray, 516-44-3300.

**Pay Stub 1: 120808**

|                      |         |            |        | Period End Date | Pay Date     |
|----------------------|---------|------------|--------|-----------------|--------------|
|                      |         |            |        | 01/29/15        | 01/30/2015   |
|                      |         |            |        | Current Period  | Year To Date |
| Regular              | 18.5000 | 185.00     | 400.33 |                 |              |
| Night Support        | 0.0000  | 0.00       | 0.00   | Social Security | 11.70        |
| Respite/Other        | 0.0000  | 0.00       | 0.00   | Federal Tax W/H | 4.65         |
| Add-To-Gross         |         | 0.00       | 0.00   | State Tax W/H   | 2.00         |
|                      |         |            |        | Medicare        | 2.73         |
| Earned Income Credit |         | 0.00       | 0.00   |                 | 6.44         |
| Current              |         |            |        | Year to Date    |              |
| Gross                | 185.00  | Deductions | 21.08  | Net             | 163.92       |
|                      |         |            |        | Gross           | 400.33       |
|                      |         |            |        | Deductions      | 45.13        |
|                      |         |            |        | Net             | 355.20       |

**Pay Stub 2: 122427**

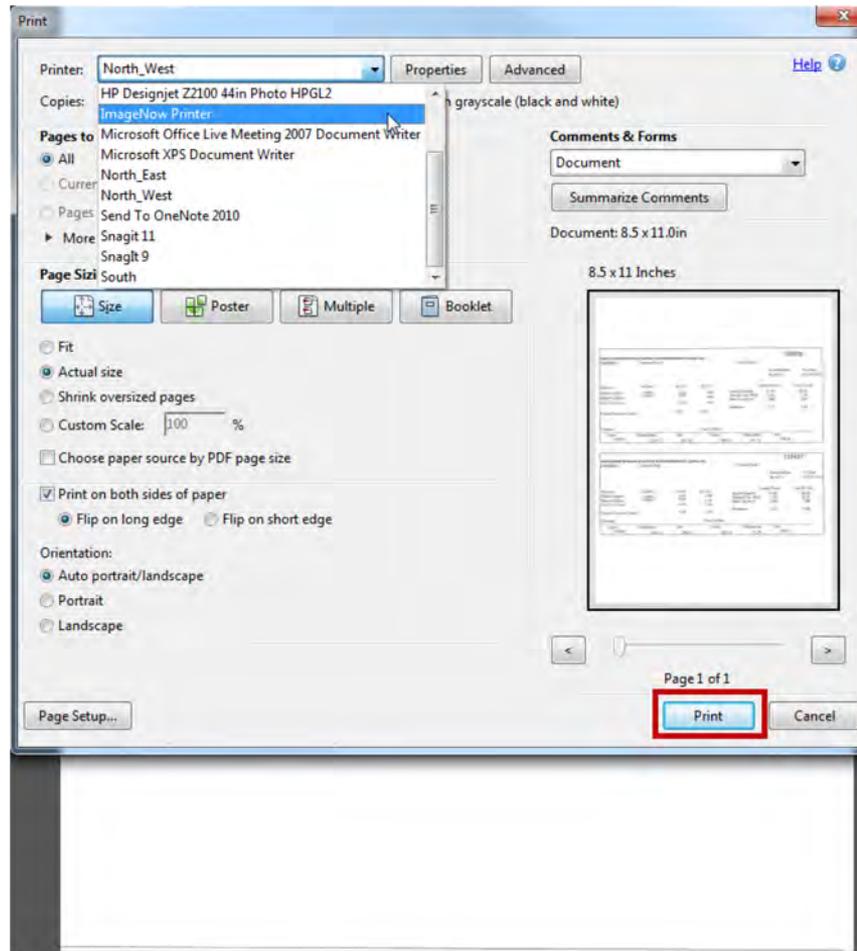
|  |  |  |  | Period End Date | Pay Date     |
|--|--|--|--|-----------------|--------------|
|  |  |  |  | 02/12/15        | 02/13/2015   |
|  |  |  |  | Current Period  | Year To Date |



# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

Select ImageNow Printer from the Printer location. Then click on the Print button.



# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

The ImageNow Print box will appear. Select IN Printer-Case from the Capture Profile drop-down. Then click on 'Ok'.

**ImageNow Print** ✕

Capture Profile

 Capture Profile: IN Printer – Case ▼

Always use this profile

OK Cancel

| Current |            | Year to Date |        |
|---------|------------|--------------|--------|
| Gross   | Deductions | Net          | Net    |
| 185.00  | 21.08      | 163.92       | 355.20 |

**122427**

**SUNFLOWER RESOURCE CENTER FOR INDEPENDENT LIVING, INC.**  
EMP1001 Lindsay Ray 516-44-3300

Period End Date: 02/12/15    Pay Date: 02/13/2015

|                      |            | Current Period |        | Year To Date    |        |       |
|----------------------|------------|----------------|--------|-----------------|--------|-------|
|                      |            |                |        |                 |        |       |
| Regular              | 23.5000    | 235.00         | 635.33 | Social Security | 14.65  | 42.20 |
| Night Support        | 0.0000     | 0.00           | 0.00   | Federal Tax W/H | 5.38   | 12.52 |
| Respite/Other        | 0.0000     | 0.00           | 0.00   | State Tax W/H   | 3.00   | 7.00  |
| Add-To-Gross         | 0.00       | 0.00           | 0.00   | Medicare        | 3.42   | 9.86  |
| Earned Income Credit |            | 0.00           | 0.00   |                 |        |       |
| Current              |            | Year to Date   |        |                 |        |       |
| Gross                | Deductions | Net            | Gross  | Deductions      | Net    |       |
| 235.00               | 26.45      | 208.55         | 635.33 | 71.58           | 563.75 |       |



# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

The Enter Received Date window will appear. Enter the received date if it's different and OK.

SUNFLOWER RESOURCE CENTER FOR INDEPENDENT LIVING, INC.  
EMP1001

120808

Period End Date: 01/29/15      Pay Date: 01/30/2015

Regular: 11.70      Year To Date: 27.55  
 Night Support: 4.65      Year To Date: 7.14  
 Respite/Other: 2.00      Year To Date: 4.00  
 Add-To-Gross: 2.73      Year To Date: 6.44

Earned Income Credit

Current      Year to Date

| Gross  | Deductions | Net    | Gross  | Deductions | Net    |
|--------|------------|--------|--------|------------|--------|
| 185.00 | 21.08      | 163.92 | 400.33 | 45.13      | 355.20 |

**Enter Received Date** window: Please enter the Received Date in the following format: MM/DD/YYYY.

SUNFLOWER RESOURCE CENTER FOR INDEPENDENT LIVING, INC.  
EMP1001      Lindsay Ray      516-44-3300

122427

Period End Date: 02/12/15      Pay Date: 02/13/2015

Regular: 23.5000      235.00      635.33      Social Security: 14.65      Current Period: 42.20      Year To Date: 42.20  
 Night Support: 0.0000      0.00      0.00      Federal Tax W/H: 5.38      Year To Date: 12.52  
 Respite/Other: 0.0000      0.00      0.00      State Tax W/H: 3.00      Year To Date: 7.00  
 Add-To-Gross:      0.00      0.00      Medicare: 3.42      Year To Date: 9.86

Earned Income Credit:      0.00      0.00

Current      Year to Date

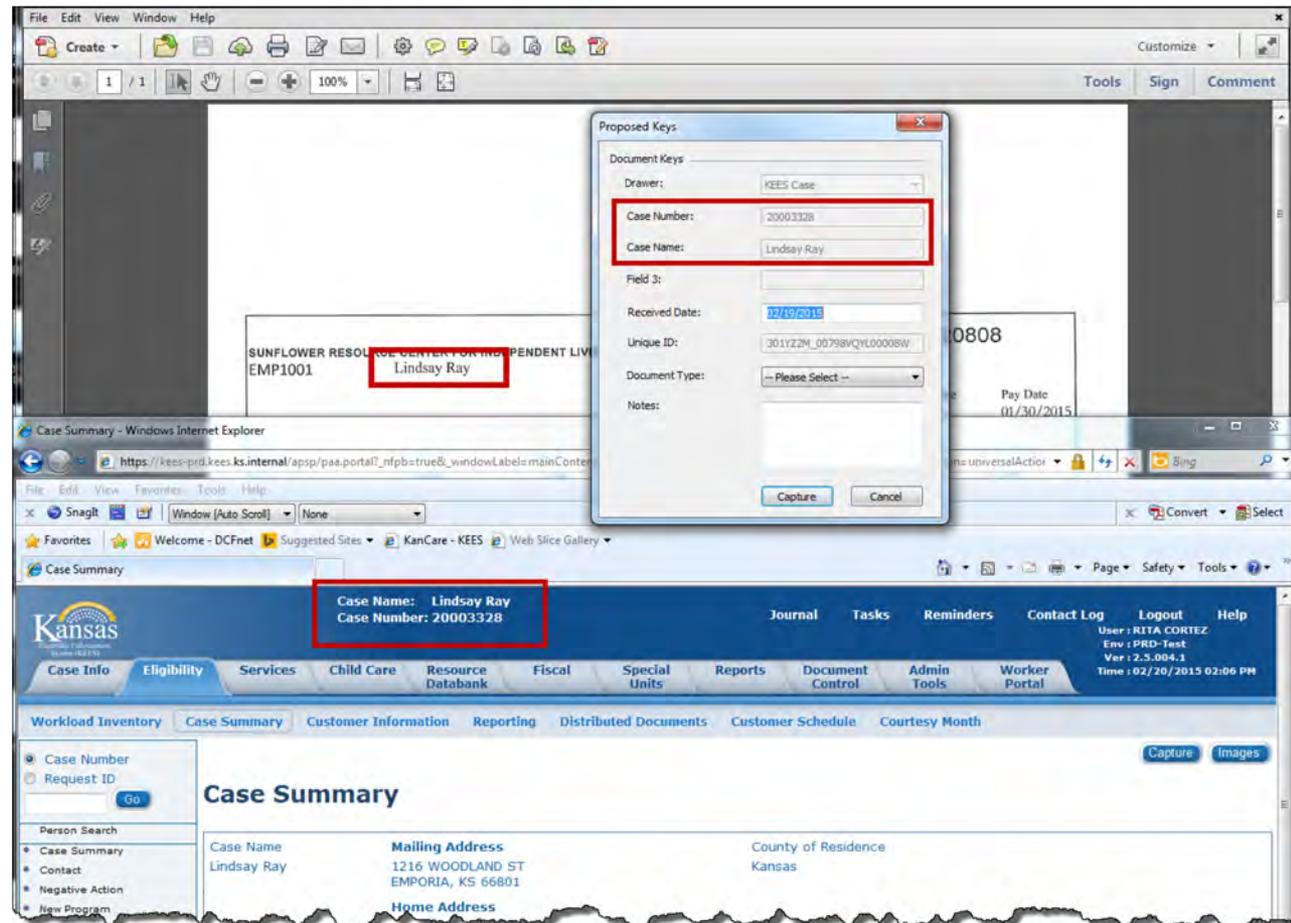
| Gross  | Deductions | Net    | Gross  | Deductions | Net    |
|--------|------------|--------|--------|------------|--------|
| 235.00 | 26.45      | 208.55 | 635.33 | 71.58      | 563.75 |

# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

The Proposed Keys window will appear.

You will validate the Case Number and Case Name from the KEES Case Summary page.



The screenshot displays the KEES Case Summary page in a web browser. A 'Proposed Keys' dialog box is open, showing the following information:

- Document Keys: KEES Case
- Case Number: 20003328
- Case Name: Lindsay Ray
- Field 3:
- Received Date: 02/19/2015
- Unique ID: 301Y2ZM\_00798VQYL0000SW
- Document Type: -- Please Select --
- Notes:

The 'Proposed Keys' dialog box has 'Capture' and 'Cancel' buttons at the bottom. In the background, the Case Summary page shows the Case Name 'Lindsay Ray' and Case Number '20003328' highlighted with red boxes. The page also displays a navigation menu with options like Case Info, Eligibility, Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. The Case Summary section includes fields for Case Name, Mailing Address (1216 WOODLAND ST, EMPORIA, KS 66801), and Home Address.



# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

Then you will select a document type and click the Capture button.

**Proposed Keys**

Document Keys

Drawer: KEES Case

Case Number: 20003328

Case Name: Lindsay Ray

Field 3:

Received Date: 02/19/2015

Unique ID: 301YZ2M\_007993QYL000082

Document Type: Income

Notes:

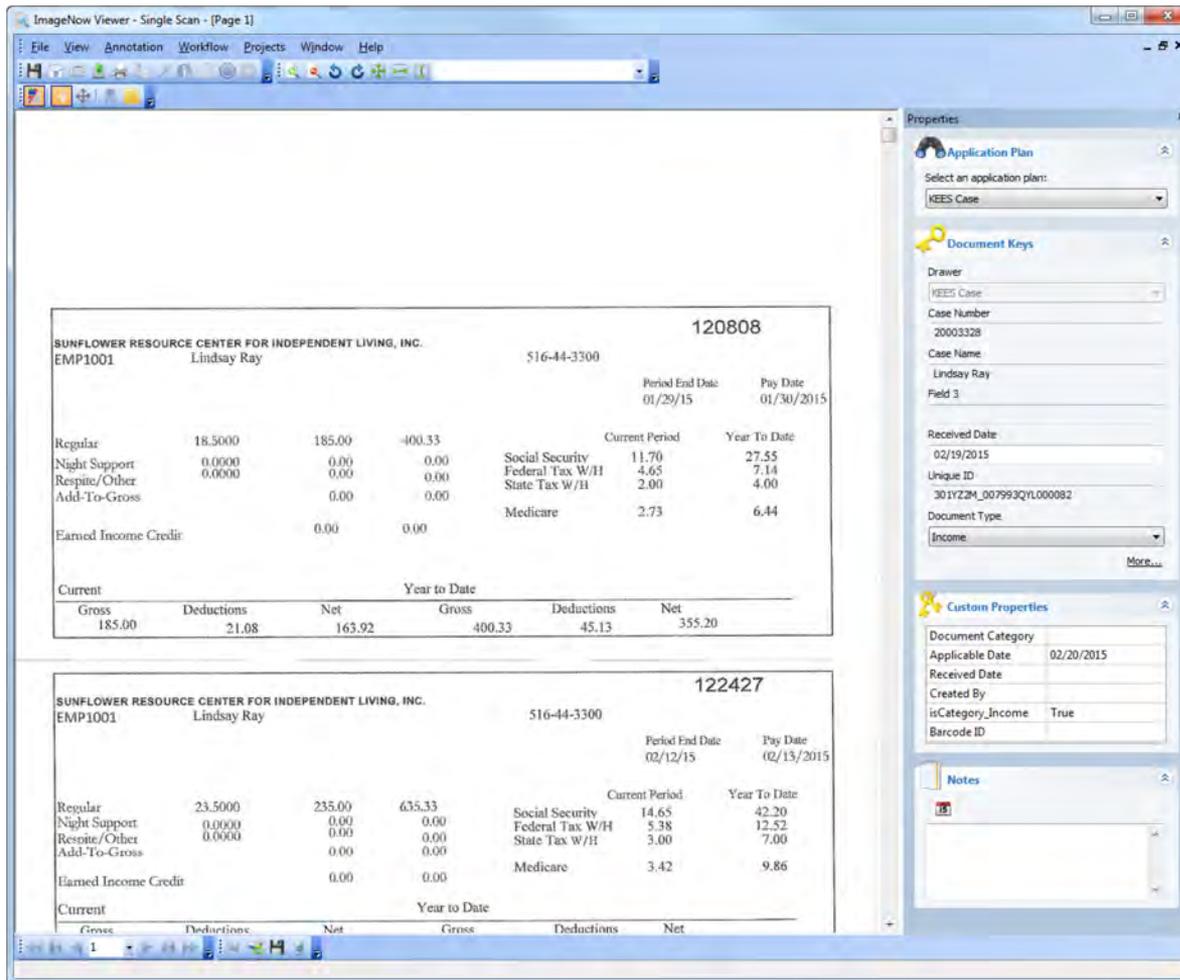
**Capture** Cancel

|                       |                     |                 |
|-----------------------|---------------------|-----------------|
| SUNFLOW<br>EMP1003    | Regular             | Date<br>30/2015 |
| Night Sup             | Respite/C           | ate             |
| Add-To-C              | Earned In           |                 |
| Current               | Gross<br>18         |                 |
| SUNFLOW<br>EMP1003    | Regular             | Date<br>13/2015 |
| Night Sup             | Respite/C           | ate             |
| Add-To-C              | Earned In           |                 |
| Current               | Gross               |                 |
| 235.00                | Deductions<br>26.45 | Net<br>208.55   |
| Overpayment           | Net<br>563.75       |                 |
| Passive Review Letter |                     |                 |
| Passport              |                     |                 |

# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

The ImageNow Viewer window will appear with your attachment showing.



The screenshot shows the ImageNow Viewer interface with two document pages displayed. The top page is for document 120808 and the bottom page is for document 122427. Both pages contain financial data for SUNFLOWER RESOURCE CENTER FOR INDEPENDENT LIVING, INC. EMP1001, Lindsay Ray, 516-44-3300.

**Document 120808:**

|                | Regular       | Night Support | Respite/Other | Add-To-Gross  | Earned Income Credit | Current Period | Year To Date  |      |
|----------------|---------------|---------------|---------------|---------------|----------------------|----------------|---------------|------|
| Gross          | 18.5000       | 0.0000        | 0.0000        | 0.00          | 0.00                 | 11.70          | 27.55         |      |
| Deductions     | 185.00        | 0.00          | 0.00          | 0.00          | 0.00                 | 4.65           | 7.14          |      |
| Net            | -400.33       | 0.00          | 0.00          | 0.00          | 0.00                 | 2.00           | 4.00          |      |
|                |               |               |               |               |                      | Medicare       | 2.73          | 6.44 |
| <b>Current</b> | <b>185.00</b> | <b>21.08</b>  | <b>163.92</b> | <b>400.33</b> | <b>45.13</b>         |                | <b>355.20</b> |      |

**Document 122427:**

|                | Regular        | Night Support | Respite/Other | Add-To-Gross | Earned Income Credit | Current Period | Year To Date |      |
|----------------|----------------|---------------|---------------|--------------|----------------------|----------------|--------------|------|
| Gross          | 23.5000        | 0.0000        | 0.0000        | 0.00         | 0.00                 | 14.65          | 42.20        |      |
| Deductions     | 235.00         | 0.00          | 0.00          | 0.00         | 0.00                 | 5.38           | 12.52        |      |
| Net            | 635.33         | 0.00          | 0.00          | 0.00         | 0.00                 | 3.00           | 7.00         |      |
|                |                |               |               |              |                      | Medicare       | 3.42         | 9.86 |
| <b>Current</b> | <b>23.5000</b> | <b>0.0000</b> | <b>0.0000</b> | <b>0.00</b>  | <b>0.00</b>          |                | <b>42.20</b> |      |

The right sidebar contains the following sections:

- Properties:** Application Plan (KEES Case), Document Keys (Drawer: KEES Case, Case Number: 20003328, Case Name: Lindsay Ray, Field 3), Received Date: 02/19/2015, Unique ID: 301V23M\_007993QY1000092, Document Type: Income.
- Custom Properties:** Document Category, Applicable Date: 02/20/2015, Received Date, Created By, isCategory\_Income: True, Barcode ID.
- Notes:** (Empty)

# Imaging: DCF

## Lesson 4: Document Processing > Capture Profiles

Click the “Submit” button. The ImageNow Viewer will close and the document will be indexed to the appropriate case number.

The screenshot shows the ImageNow Viewer application window. The 'File' menu is open, and the 'Save' option is highlighted. The main document area displays two pages of financial data. The first page is for 'DR INDEPENDENT LIVING, INC.' with case number 120808. The second page is for 'SUNFLOWER RESOURCE CENTER FOR INDEPENDENT LIVING, INC.' with case number 122427. A floppy disk icon is overlaid on the second page. The right-hand side of the window contains a 'Properties' panel with sections for 'Application Plan', 'Document Keys', 'Custom Properties', and 'Notes'.

|                             | 185.00 | 400.33 |  | Current Period | Year To Date |
|-----------------------------|--------|--------|--|----------------|--------------|
| Social Security             |        |        |  | 11.70          | 27.55        |
| Federal Tax W/H             |        |        |  | 4.65           | 7.14         |
| State Tax W/H               |        |        |  | 2.00           | 4.00         |
| Medicare                    |        |        |  | 2.73           | 6.44         |
| Earned Income Credit        | 0.00   | 0.00   |  |                |              |
| <b>Current Year to Date</b> |        |        |  |                |              |
| Gross                       | 185.00 |        |  | Gross          |              |
| Deductions                  |        | 21.08  |  | Deductions     | 45.13        |
| Net                         |        | 163.92 |  | Net            | 355.20       |

|                             | 25   | 655.33 |  | Current Period | Year To Date |
|-----------------------------|------|--------|--|----------------|--------------|
| Social Security             |      |        |  | 14.65          | 42.20        |
| Federal Tax W/H             |      |        |  | 5.38           | 12.52        |
| State Tax W/H               |      |        |  | 3.00           | 7.00         |
| Medicare                    |      |        |  | 3.42           | 9.86         |
| Earned Income Credit        | 0.00 | 0.00   |  |                |              |
| <b>Current Year to Date</b> |      |        |  |                |              |
| Gross                       | 25   |        |  | Gross          |              |
| Deductions                  |      | 21.08  |  | Deductions     | 45.13        |
| Net                         |      | 163.92 |  | Net            | 355.20       |

# Imaging: DCF

## Lesson 4: Document Management > Summary

In Lesson 4, you learned:

- Imaging processes and definitions
- Two ways to capture documents
- DCF capture profiles to be used for Phase 2
- The steps used for IN Printer



- Lesson 1: What is Imaging?
- Lesson 2: Sorting Documents
- Lesson 3: ImageNow Fundamentals
- Lesson 4: Document Processing
- **Lesson 5: Document Management**
- Lesson 6: Troubleshooting





# Imaging: DCF

## Lesson 5: Document Management > Introduction

This lesson will walk through the process of retrieving a Document. After which, we will look at splitting and copying documents as well as indexing at the Person Level.



After completing this lesson, you be able to:

- Retrieve a document
- Split and copy a document
- Index a document to the Person Level
- Re-Index a DCF Non-Medical document to the correct case and document type



# Imaging: DCF

## Lesson 5: Document Management > Retrieval in KEES

### Document Retrieval

- The ImageNow Solution utilizes the index values associated to the image to retrieve the correct document(s)
- Two Ways to Retrieve documents
  - By selecting the **Images** button on the certain KEES pages
  - By using the ImageNow Explorer

The screenshot displays the KEES system interface for Case Name: Lindsay Ray, Case Number: 20003328. The page title is 'Employment List'. A red box highlights the 'Images' button in the top right corner. The interface includes a navigation menu with tabs like 'Case Info', 'Eligibility', 'Services', etc., and a sidebar with a tree view under 'Non Financial' and 'Employment'. The main content area shows a 'Search Results Summary' for 'Root Questions' with a table of employment records.

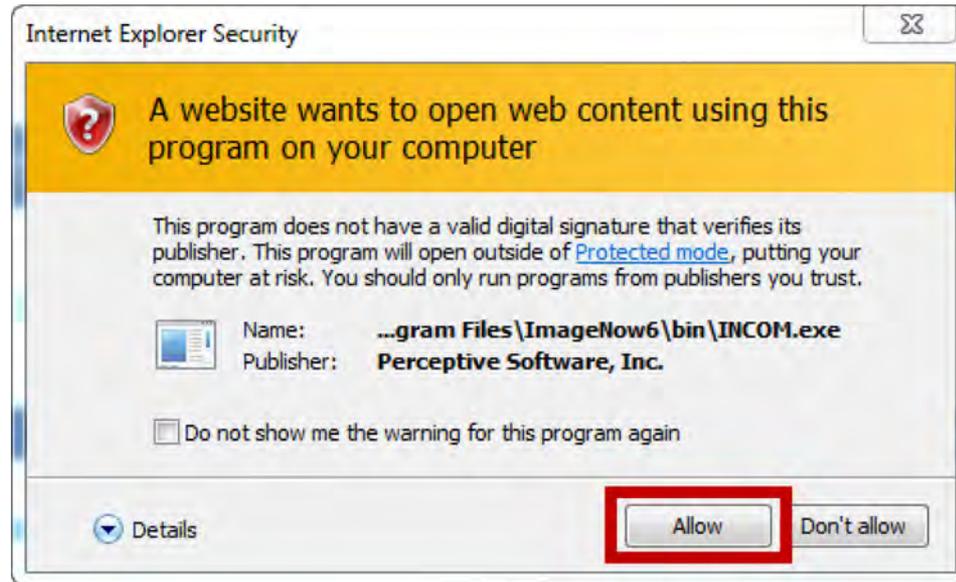
| Employer   | Name         | Date Hired | Termination Date |
|--|--------------|------------|------------------|
| Sunflower Resource Center For Independent Living, Inc. | Ray, Lindsay | 01/16/2015 |                  |



# Imaging: DCF

## Lesson 5: Document Management > Retrieval in KEES

Once you click on the Images Button in KEES, the following pop-up window may appear.





# Imaging: DCF

## Lesson 5: Document Management > Retrieval in KEES

Once you are done viewing the document, you can close the windows.

The screenshot shows the ImageNow Viewer application window. The 'File' menu is open, and the 'Close Viewer' option is highlighted with a red box. The main window displays two document pages, each containing a table of financial data for a specific case.

**Document 1: 120808**  
 SUNFLOWER RESOURCE CENTER FOR INDEPENDENT LIVING, INC.  
 EMP1001 Lindsay Ray 516-44-3300  
 Period End Date: 01/29/15, Pay Date: 01/30/2015

|                 | Current Period | Year To Date |
|-----------------|----------------|--------------|
| Social Security | 11.70          | 27.55        |
| Federal Tax W/H | 4.65           | 7.14         |
| State Tax W/H   | 2.00           | 4.00         |
| Medicare        | 2.73           | 6.44         |

**Summary Table:**

| Current |            |        | Year to Date |            |        |
|---------|------------|--------|--------------|------------|--------|
| Gross   | Deductions | Net    | Gross        | Deductions | Net    |
| 185.00  | 21.08      | 163.92 | 400.33       | 45.13      | 355.20 |

**Document 2: 122427**  
 SUNFLOWER RESOURCE CENTER FOR INDEPENDENT LIVING, INC.  
 EMP1001 Lindsay Ray 516-44-3300  
 Period End Date: 02/12/15, Pay Date: 02/13/2015

|                      | Current Period | Year To Date |
|----------------------|----------------|--------------|
| Regular              | 23.5000        | 235.00       |
| Night Support        | 0.0000         | 0.00         |
| Respite/Other        | 0.0000         | 0.00         |
| Add-To-Gross         | 0.00           | 0.00         |
| Earned Income Credit | 0.00           | 0.00         |
| Social Security      | 14.65          | 42.20        |
| Federal Tax W/H      | 5.38           | 12.52        |
| State Tax W/H        | 3.00           | 7.00         |
| Medicare             | 3.42           | 9.86         |

**Summary Table:**

| Current |            |        | Year to Date |            |        |
|---------|------------|--------|--------------|------------|--------|
| Gross   | Deductions | Net    | Gross        | Deductions | Net    |
| 235.00  | 26.45      | 208.55 | 635.33       | 71.58      | 563.75 |

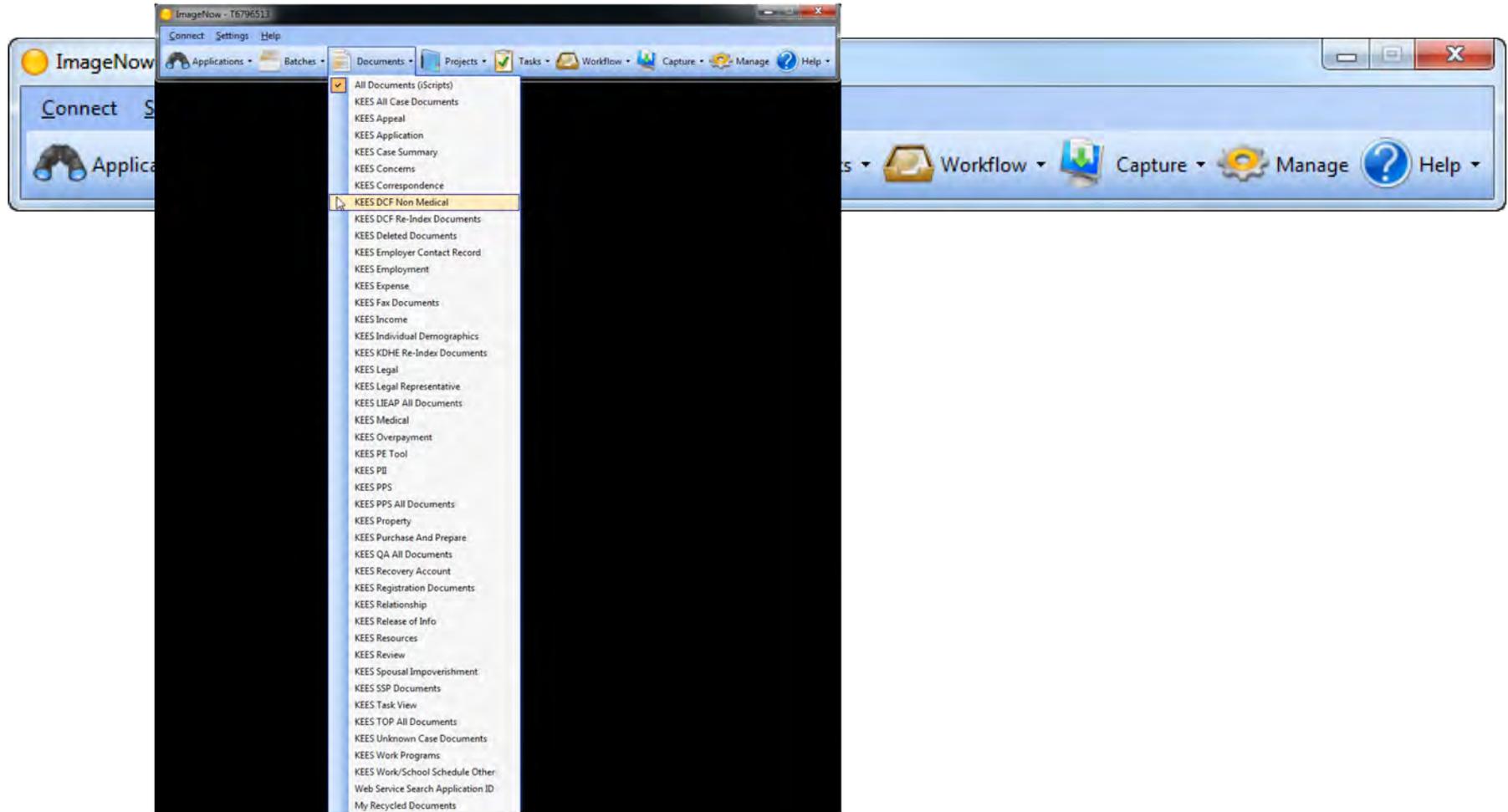
The right-hand pane shows 'Document Keys' and 'Custom Properties' for the selected document, including fields for Case Number, Case Name, Person Name, and Document Type.



# Imaging: DCF

## Lesson 5: Document Management > Retrieval in ImageNow

STEP 2. ImageNow Toolbar will be displayed.





# Imaging: DCF

## Lesson 5: Document Management > Retrieval in ImageNow

The image displays three overlapping screenshots of the ImageNow Explorer software interface. The leftmost screenshot shows the main application window with a 'Views' pane on the left side. The 'Views' pane lists several categories, including 'KEES Concerns', 'KEES Correspondence', and 'KEES DCF Non Medical'. The middle screenshot shows a search filter applied to the 'Income' category. A search criteria box contains the text: 'Case Number is equal to <<Prompt: Please Enter Case Number>>' and 'AND isCategory\_Income is equal to True'. A red box highlights the 'KEES DCF Non Medical' folder in the tree view. The rightmost screenshot shows a 'Select a Search Value' dialog box with a text input field labeled 'Please Enter Case Number' and 'OK' and 'Cancel' buttons.



# Imaging: DCF

## Lesson 5: Document Management > Retrieval in ImageNow

The screenshot shows the ImageNow Explorer application window. The title bar reads 'ImageNow Explorer'. The menu bar includes 'File', 'Edit', 'View', 'Workflow', 'Projects', and 'Help'. The address bar shows 'KEES DCF Non Medical'. Below the address bar is a 'Quick Search' section with a search box and a 'Go' button. A search filter is set to 'Case Number' and 'starts with' with the value '02100001'. The main area displays a table with the following data:

| Drawer               | Case Number | Case Name       | Person MPI | Person Name | Batch ID               | Document Type | Received Date | Pages | Workflow Queue |
|----------------------|-------------|-----------------|------------|-------------|------------------------|---------------|---------------|-------|----------------|
| KEES DCF Non Medical | 02100001    | Victoria M Cain |            |             | 301YZ2R_007BZEYW0000BT | Application   | 02/19/2015    | 20    |                |

The left sidebar shows a tree view of document categories under 'Documents', including 'All Documents (iScripts)', 'KEES All Case Documents', 'KEES Appeal', 'KEES Application', 'KEES Case Summary', 'KEES Concerns', 'KEES Correspondence', 'KEES DCF Non Medical', and various sub-categories like 'ADAP', 'Appeal', 'Application', etc. The status bar at the bottom right indicates '1 selected' and '1 documents'.

# Imaging: DCF

## Lesson 5: Document Management > Retrieval in ImageNow

The screenshot shows the ImageNow Viewer interface with a scanned document. The document header includes the Kansas Department for Children and Families logo and the title 'Application for Benefits'. A 'Date Received' stamp is dated FEB 19 2015. A 'STOP! Would you rather apply online?' graphic is present. The document lists assistance programs: Food Assistance, Cash Assistance, and Child Care Assistance. The right-hand side of the viewer shows a 'Properties' panel with 'Document Keys' and 'Custom Properties' sections.

**Document Keys:**

|               |                        |
|---------------|------------------------|
| Drawer        | KEES DCF Non Medical   |
| Case Number   | 02100001               |
| Case Name     | Victoria M Cain        |
| Person MPI    |                        |
| Person Name   |                        |
| Batch ID      | 301YZ2R_007BZEYVW000BT |
| Document Type | Application            |

**Custom Properties:**

|                       |             |
|-----------------------|-------------|
| Document Category     | Application |
| Applicable Date       | 02/24/2015  |
| Received Date         | 02/19/2015  |
| Created By            | X1922111    |
| isCategory_Applicator | True        |
| Barcode ID            |             |

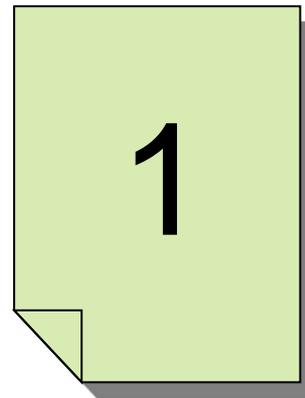
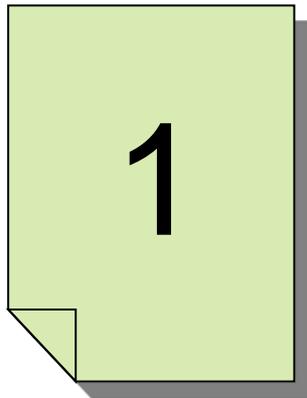
# Imaging: DCF

## Lesson 5: Document Management > Copy A Document

The ImageNow Copy Document function allows a user to:

1. Make a copy of one or more pages of a document, and
2. Change the document keys for those pages

Changing the document keys will distinguish the copied document from the original document.



# Imaging: DCF

## Lesson 5: Document Management > Copy A Document

A document  
Non-Med  
document

ns to a  
e original

**Copy Document**

**Document Keys**

Application plan: (None)  Select the current application plan by default

Drawer: KEES Case

Case Number: 20003337

Case Name: Caron Sample

Person MPI:

Person Name:

Batch ID: 301YZ2R\_007BZNYW00005J

Document Type: Personal Identifying Information

**Content**

Selected region  
 Current page  
 All open pages  
 All pages  
 Page range:  Example: 1,3,5-12

Remove selected pages from current document

**Custom Properties**

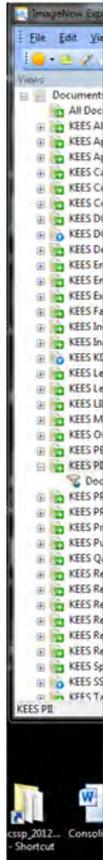
|                   |                              |
|-------------------|------------------------------|
| Document Category | Personal Identifying Informa |
| Applicable Date   | 02/24/2015                   |
| Received Date     | 02/18/2015                   |
| Created By        | T6796513                     |
| isCategory_PII    | True                         |
| Barcode ID        |                              |

Use default values

**Advanced**

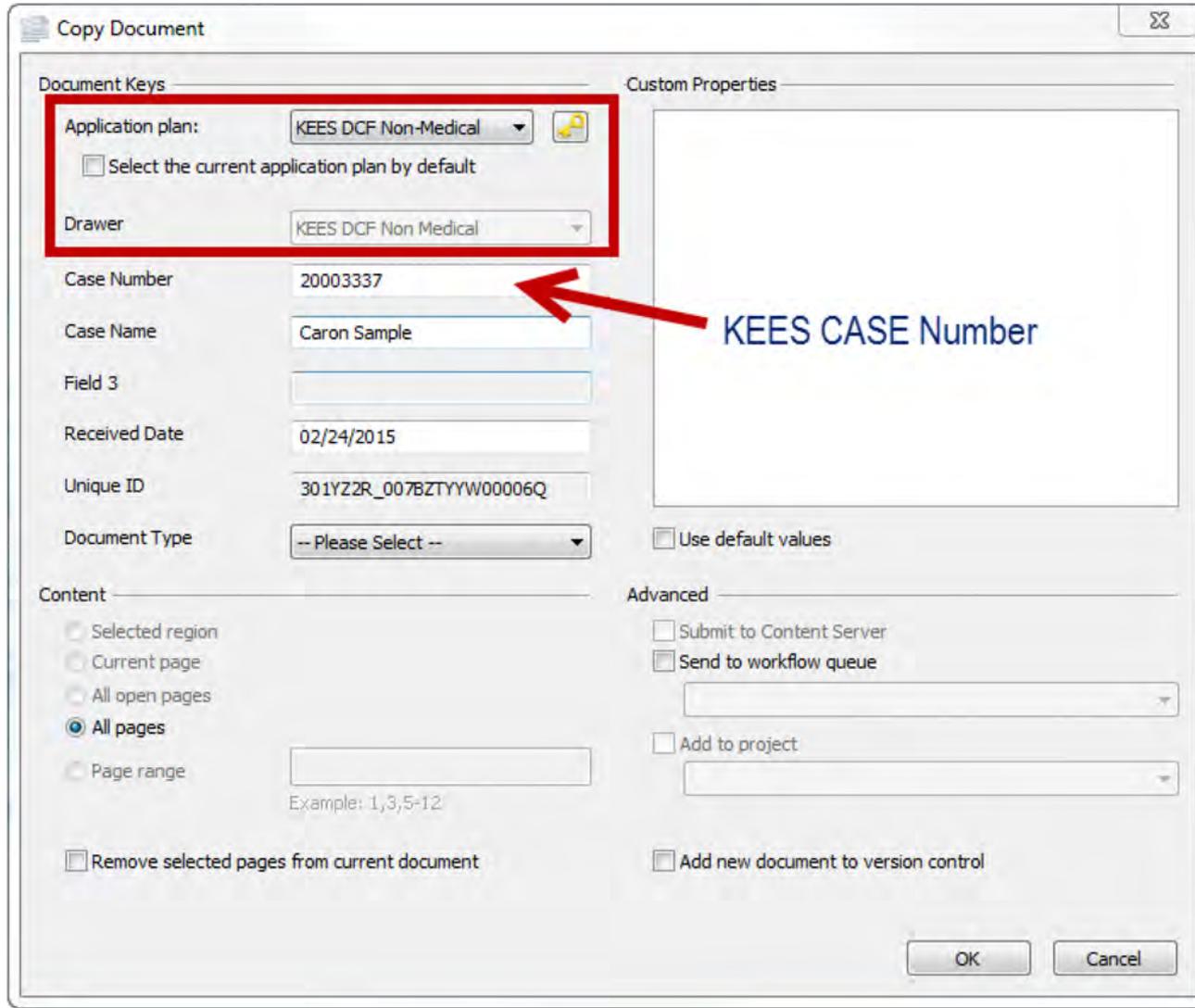
Submit to Content Server  
 Send to workflow queue   
 Add to project   
 Add new document to version control

OK Cancel



# Imaging: DCF

## Lesson 5: Document Management > Copy A Document



**Copy Document**

**Document Keys**

Application plan: KEES DCF Non-Medical 

Select the current application plan by default

Drawer: KEES DCF Non Medical

Case Number: 20003337

Case Name: Caron Sample

Field 3:

Received Date: 02/24/2015

Unique ID: 301YZ2R\_007BZTYW00006Q

Document Type: -- Please Select --

**Custom Properties**

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

KEES CASE Number

# Imaging: DCF

## Lesson 5: Document Management > Copy A Document

ImageNow Viewer - [Page 1]

File View Annotation Workflow Projects Window Help

Income  
Inmate Application  
IR  
Legal  
Legal Representative  
LIEAP Application  
LTC Communication  
LTC Communication Urgent Need  
Medical  
Online Application  
Online Change  
Online Review  
Overpayment  
PE Tool  
Perm Cust Sub Review  
**Personal Identifying Information**  
PII-Newborn  
Potential CH Application  
PPS  
PPS Forms  
PPS Legal  
Pre Release Application  
Release of Info  
Resources  
Returned Mail-In State  
Returned Mail-No Fwd Address  
Returned Mail-Out of State  
Returned Mail-PR Letter  
Review  
Spousal Impoverishment  
-- Please Select --

Copy Document

Document Keys

Application plan:  
 Select the current app

Drawer

Case Number

Case Name

Field 3

Received Date

Unique ID

Document Type

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

Properties

Document Keys

Drawer  
KEES Case

Case Number  
20003337

Case Name  
Caron Sample

Person MPI

Person Name

Batch ID  
301YZ2R\_007BZNYW00005J

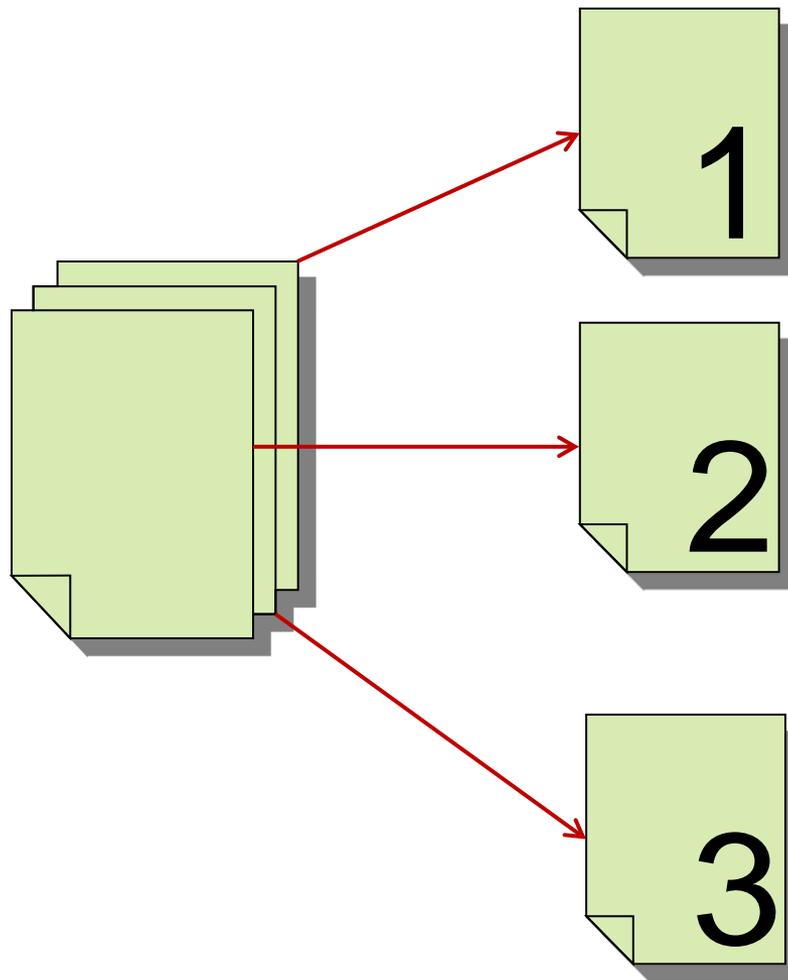
Document Type  
Personal Identifying Information

Custom Properties

| Document Category | Personal Identifying In |
|-------------------|-------------------------|
| Applicable Date   | 02/24/2015              |
| Received Date     | 02/18/2015              |
| Created By        | T6796513                |
| isCategory_PII    | True                    |
| Barcode ID        |                         |

Notes

The KEES Indexing eForm allows users to complete re-indexing and additional indexing when necessary. The indexing options include: Step 2 Person Level indexing, Received Date, and Document Category/Type. The Indexing eForm is only applicable to KEES case numbers because it validates the case number.





# Imaging: DCF

## Lesson 5: Document Management > Document Split

Splitting a document allows a user to move selected pages from the original document and then use those pages to create a new document with unique index values.

We will be using the KEES Indexing eForm for this process for KEES Medical cases only.

The screenshot displays three overlapping windows from the ImageNow software:

- ImageNow Explorer:** Shows a tree view of document folders such as 'Application Plans', 'Batches', 'Documents', and 'All Documents (iScripts)'. The 'Documents' folder is expanded, showing sub-folders like 'KEES All Case Documents', 'KEES Appeal', 'KEES Application', 'KEES Case Summary', 'Document Search', 'KEES Concerns', 'KEES Correspondence', 'KEES DCF Non Medical', 'KEES DCF Re-Index Documents', 'KEES Deleted Documents', 'KEES Employer Contact Record', and 'KEES Employment'.
- ImageNow Viewer - [Page 1]:** Displays two 'Earnings Statement' tables for 'Educational Credit Union' (2808 SW Arrowhead Rd., Topeka, KS 66634).
 

| Income           | Rate | Hours | Current Total   | Deductions            | Current Total  | Year-To-Date    |
|------------------|------|-------|-----------------|-----------------------|----------------|-----------------|
| GROSS WAGES      | 9.25 | 30    | \$277.50        | FICA MED TAX          | \$4.00         | \$4.00          |
|                  |      |       |                 | FICA SS TAX           | \$17.21        | \$17.21         |
|                  |      |       |                 | FED TAX               | \$18.90        | \$18.90         |
|                  |      |       |                 | STATE TAX             | \$4.00         | \$4.00          |
| <b>YTD GROSS</b> |      |       | <b>\$277.50</b> | <b>YTD DEDUCTIONS</b> | <b>\$44.13</b> | <b>NET PAY</b>  |
|                  |      |       |                 |                       |                | <b>\$233.37</b> |

| Income           | Rate | Hours | Current Total   | Deductions            | Current Total  | Year-To-Date    |
|------------------|------|-------|-----------------|-----------------------|----------------|-----------------|
| GROSS WAGES      | 9.25 | 35    | \$323.75        | FICA MED TAX          | \$4.69         | \$8.71          |
|                  |      |       |                 | FICA SS TAX           | \$20.07        | \$37.28         |
|                  |      |       |                 | FED TAX               | \$28.53        | \$42.43         |
|                  |      |       |                 | STATE TAX             | \$6.00         | \$50.00         |
| <b>YTD GROSS</b> |      |       | <b>\$601.25</b> | <b>YTD DEDUCTIONS</b> | <b>\$50.29</b> | <b>NET PAY</b>  |
|                  |      |       |                 |                       |                | <b>\$269.46</b> |
- Document Key:** Shows a 'Document Key' window with fields for 'Driver', 'KEES Case', 'Case Number', 'Case Name', 'Person Name', and 'Person NPI'. A 'Go' button is visible.
- Document Key Table:** A table with columns 'Document Type', 'Received Date', 'Pages', and 'Workflow Queue'.
 

| Document Type        | Received Date | Pages | Workflow Queue |
|----------------------|---------------|-------|----------------|
| Identifying Infor... | 02/18/2015    | 1     |                |
| Identifying Infor... | 02/18/2015    | 1     |                |
|                      | 02/18/2015    | 2     |                |
|                      | 02/18/2015    | 2     |                |



# Imaging: DCF

## Lesson 5: Document Management > Document Split

The screenshot displays the 'KEES Indexing eForm' interface within an 'ImageNow Viewer' window. The main form area shows the 'Kansas Eligibility Enforcement System (KEES) Indexing eForm' header. Below the header, there are input fields for 'Case Number' (20003337) and 'Case Name' (Caron Sample). A 'Document Category' dropdown menu is open, listing various categories such as 'Appeal', 'Application', 'Barcoded Document', 'Concerns', 'Correspondence', 'Employer Contact Re', 'Expense', 'Income', 'Legal', 'Legal Representative', 'Medical', 'Overpayment', 'PE Tool', 'Personal Identifying', 'PPS', 'Release of Info', 'Resources', 'Review', 'Spousal Impoverishm', 'Trust/Annuity', 'Work Programs', and 'Work/School Schedu'. The 'Income' category is currently selected in the dropdown. To the right of the dropdown, there is a 'Doc Type' dropdown menu with 'Income' selected. Below the dropdowns, there are 'Copy' and 'Remove' buttons. On the far right, a vertical sidebar contains a table with the following data:

|            |
|------------|
| Income     |
| 02/24/2015 |
| 02/18/2015 |
| T6796513   |
| True       |

At the bottom of the sidebar, it says 'Page 1 of 2'.



# Imaging: DCF

## Lesson 5: Document Management > Document Split

ImageNow Viewer - [Page 1] Forms

Select a form: KEES Indexing eForm

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

Refresh Submit

Case Number: 20003337 Case Name: Caron Sample

Pages: 1 | 2 Document Category: Employer Contact Doc Type: Employer Contact

Applicable Date: 02/25/2015 Received Date: 02/18/2015

Selected Case Member Information  Mark for Delete

New Copy Remove

Document Keys

Document Properties

|                   |            |
|-------------------|------------|
| Document Category | Income     |
| Effective Date    | 02/24/2015 |
| Date              | 02/18/2015 |
| Key               | T6796513   |
| Yearly Income     | True       |
| Document          |            |

Page 1 of 2



### Re-Indexing

- When
  - A user captures a document with an unknown case number
  - A user mistakenly scans a document while viewing the wrong Case Summary Page in the KEES system
- Who
  - Users with access to the ImageNow Indexing eForm will have the ability to re-index documents
  - Other users may come across misplaced index documents
- Users should always be on the KEES Case Summary Page that corresponds to the case number where you want the document to end up before opening the document that requires re-indexing in the ImageNow Viewer.



# Imaging: DCF

## Lesson 5: Document Management > Re-Indexing

Step 1. Navigate to the Case Summary page for the case you want to associate to the documents.

The screenshot shows the 'Case Summary' page for Lindsay Ray (Case Number: 20003328). The page includes a navigation menu with tabs for Case Info, Eligibility, Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Document Control, Admin Tools, and Worker Portal. The main content area displays case details, including mailing and home addresses, companion cases, and medical programs. A sidebar on the left contains a search bar and a list of navigation options.

**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** **Capture** **Images**

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

**Home Address**  
1216 WOODLAND ST  
EMPORIA, KS 66801

**Companion Cases**

| Case Number | Case Name |
|-------------|-----------|
|             |           |

**Add**

**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="#">DW5502G102</a>         | <b>Language:</b>                    | English     |
| <b>Program Status:</b> | Pending                            | <b>Phone Number:</b>                |             |
|                        |                                    | <b>Application Date:</b>            | 02/17/2015  |

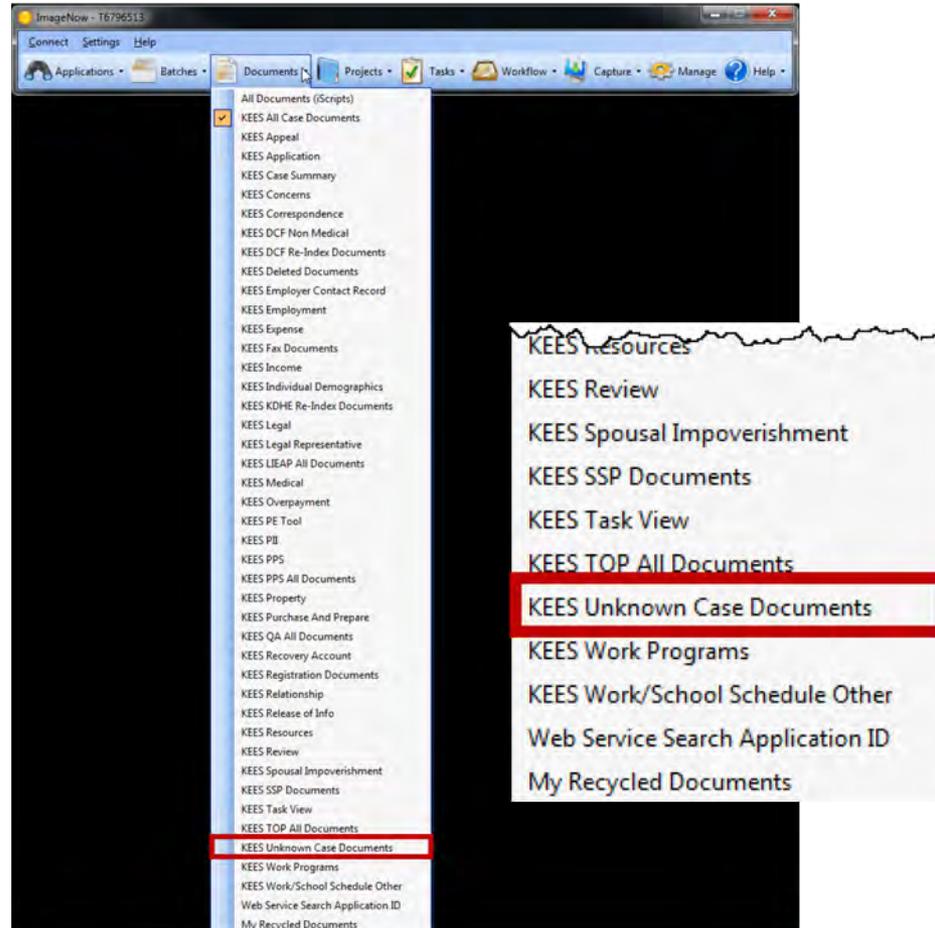
| Name | Requested Medical | Review Month | Relationship To Primary | Role | Role | Status | Status Reason |
|------|-------------------|--------------|-------------------------|------|------|--------|---------------|
|      |                   |              |                         |      |      |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



# Imaging: DCF

## Lesson 5: Document Management > Re-Indexing

Step 2. Click the drop-down caret next to the Documents button on the ImageNow toolbar and select KEES Unknown Case Documents as the desired Document View Filter.





# Imaging: DCF

## Lesson 5: Document Management > Re-Indexing

Step 4. Use the Quick Search parameters to retrieve desired document to re-index.

The screenshot shows the ImageNow Explorer interface. The left sidebar displays a tree view of folders under 'Documents', with 'KEES Income' selected. The main window shows a search results table for 'KEES Income'. The search criteria are 'Case Name' starts with 'Lindsay Ray'. The results table has the following data:

| Drawer    | Case Number | Case Name   | Person MPI | Person Name | Batch ID    | Document Type | Received Date | Pages | Workflow Queue | isCategory_Income |
|-----------|-------------|-------------|------------|-------------|-------------|---------------|---------------|-------|----------------|-------------------|
| KEES Case | 20003328    | Lindsay Ray |            |             | 301YZ2M_... | Income        | 02/19/2015    | 1     |                | True              |
| KEES Case | 20009999    | LINDSAY RAY |            |             | 301YZ2S_... | Income        | 02/25/2015    | 2     |                | True              |

The 'Go' button in the top right corner of the search area is highlighted with a red box. The status bar at the bottom indicates '1 selected' and '2 documents'.



# Imaging: DCF

## Lesson 5: Document Management > Re-Indexing

Step 6. Double Click the document you want to view. The document will open the ImageNow Viewer.

**ImageNow Viewer - [Page 1]**

File View Annotation Workflow Projects Window Help

Select a form: **KEES Indexing eform**

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

Refresh Submit

Case Number: **12588706** Case Name: **LINDSAY RAY**

Pages: 1 | 2 Document Category: **Income** Doc Type: **Income**

Applicable Date: **02/25/2015** Received Date: **02/25/2015**

Selected Case Member Information  Mark for Delete

New Copy Remove

**SCHEDULE E** Supplemental Income and Loss (Form 1041) **2014**

Income or Loss From Rental Real Estate and Royalties. Use this form to report rental real estate income or loss from Form 988 or page 11 of all Schedule E or E-SE 1041-ES returns. If you are an individual, report both rental income or loss from Form 988 or page 11 of all Schedule E or E-SE 1041-ES returns and any other income or loss from Form 988 or page 11 of all Schedule E or E-SE 1041-ES returns.

| Type of Property | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9  | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 32 | 33 | 34 | 35 | 36 | 37 | 38 | 39 | 40 | 41 | 42 | 43 | 44 | 45 | 46 | 47 | 48 | 49 | 50 | 51 | 52 | 53 | 54 | 55 | 56 | 57 | 58 | 59 | 60 | 61 | 62 | 63 | 64 | 65 | 66 | 67 | 68 | 69 | 70 | 71 | 72 | 73 | 74 | 75 | 76 | 77 | 78 | 79 | 80 | 81 | 82 | 83 | 84 | 85 | 86 | 87 | 88 | 89 | 90 | 91 | 92 | 93 | 94 | 95 | 96 | 97 | 98 | 99  | 100 |
|------------------|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|-----|-----|
| 1                | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 32 | 33 | 34 | 35 | 36 | 37 | 38 | 39 | 40 | 41 | 42 | 43 | 44 | 45 | 46 | 47 | 48 | 49 | 50 | 51 | 52 | 53 | 54 | 55 | 56 | 57 | 58 | 59 | 60 | 61 | 62 | 63 | 64 | 65 | 66 | 67 | 68 | 69 | 70 | 71 | 72 | 73 | 74 | 75 | 76 | 77 | 78 | 79 | 80 | 81 | 82 | 83 | 84 | 85 | 86 | 87 | 88 | 89 | 90 | 91 | 92 | 93 | 94 | 95 | 96 | 97 | 98 | 99 | 100 |     |

**Properties**

Document Keys

Drawer: **KEES Case**

Case Number: **20009999**

Case Name: **LINDSAY RAY**

Person MPI:

Person Name:

Batch ID: **301VZ25\_007BZLYW00008C**

Document Type: **Income**

**Custom Properties**

Document Category: **Income**

Applicable Date: **02/25/2015**

Received Date: **02/25/2015**

Created By: **T6796513**

isCategory\_Income: **True**

Barcode ID:

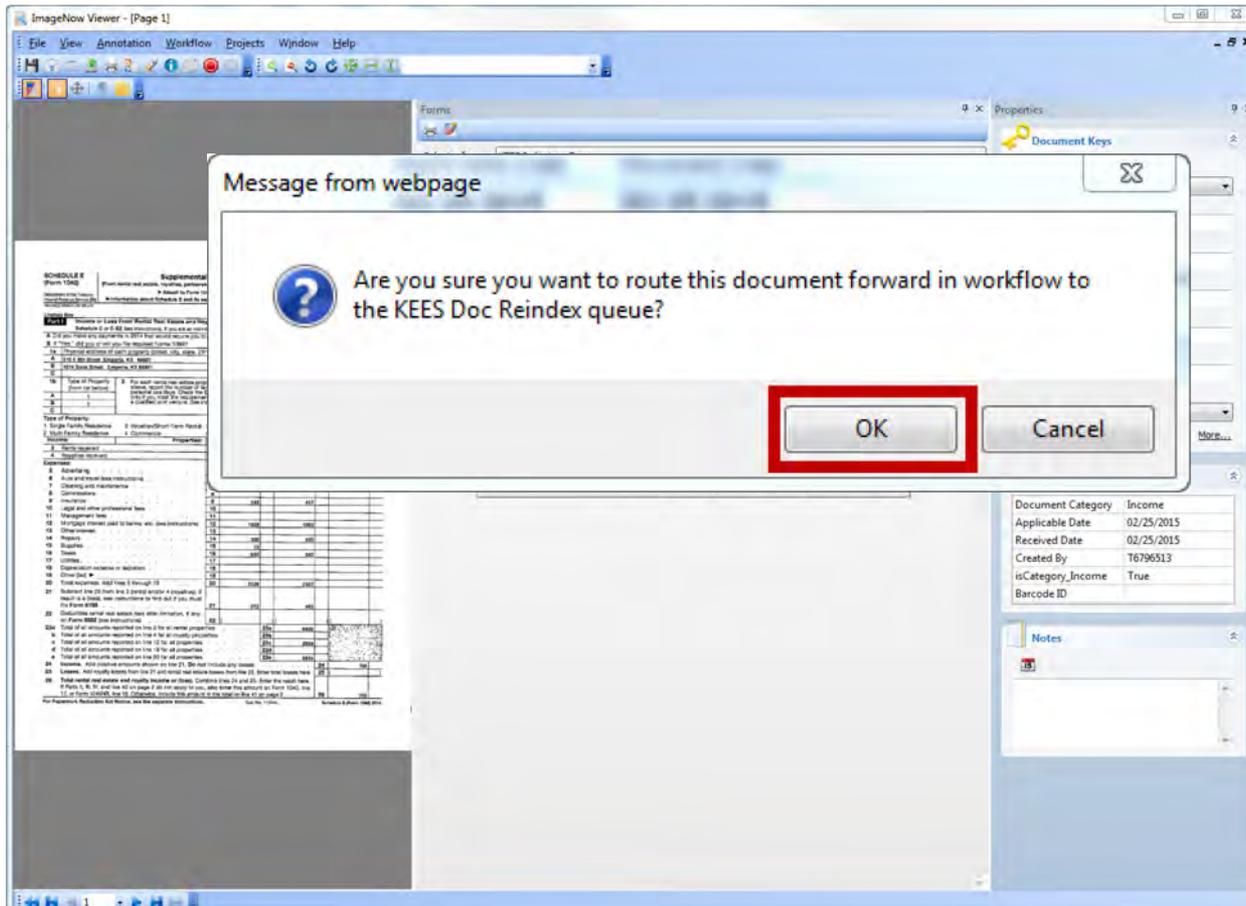
**Notes**



# Imaging: DCF

## Lesson 5: Document Management > Re-Indexing

Step 8. Update the values in the appropriate eForm fields. Click the Submit button.





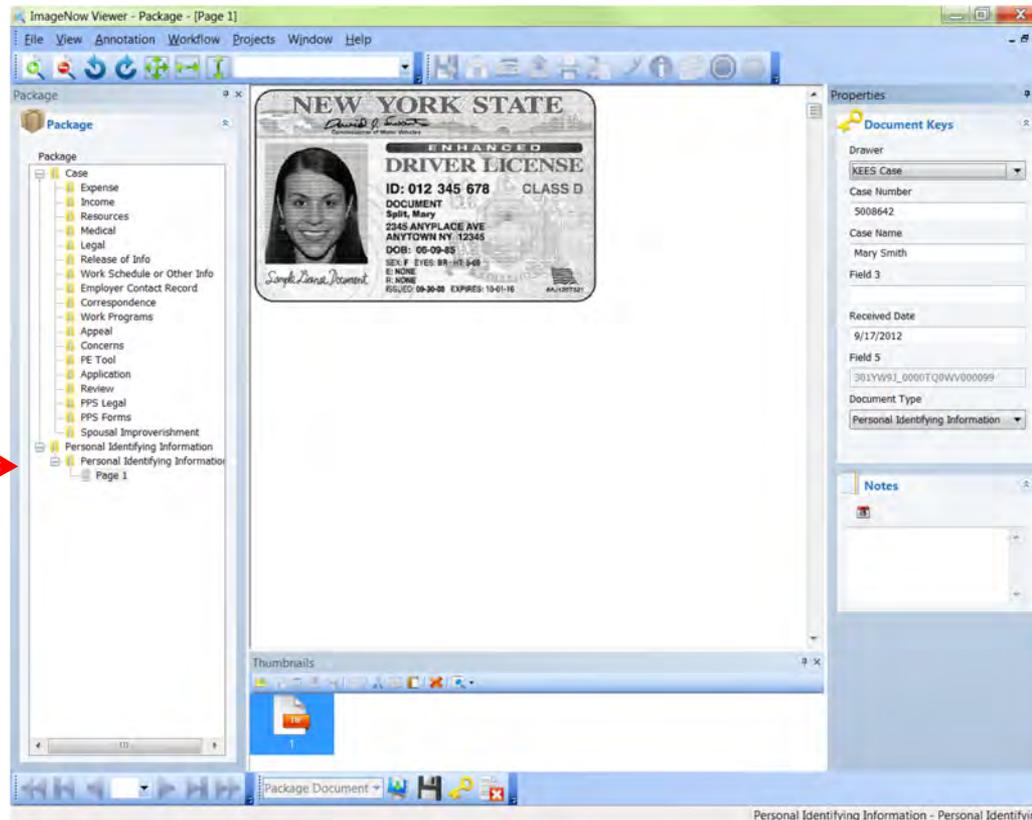
# Imaging: DCF

## Lesson 5: Document Management > Case vs Person

Initially all documents are associated to a case. For personal identifying information (PII) do second level indexing to the individual using Indexing eForm.

Case  
Indexing

Person  
Indexing



# Imaging: DCF

## Lesson 5: Document Management > Case vs Person

### Case Level Indexing:

Case Documents will be Indexed to the Case Number, Case Name and Document Type.

Example: 1234, Jane Doe/Income

The following describes and displays the index fields for Case Level Documents.

The screenshot shows a 'Properties' window titled 'Document Keys' with a key icon. It contains the following fields:

- Drawer:** A dropdown menu with 'KEES Case' selected.
- Case Number:** A text input field containing '5006278'.
- Case Name:** A text input field containing 'Catherine O'Brien'.
- Field 3:** An empty text input field.
- Received Date:** A date input field containing '08/15/2013'.
- Unique ID:** A text input field containing '301YX8G\_001P42XY100000S'.
- Document Type:** A dropdown menu with 'Application' selected.

| Feld / Property      | Description                                 |
|----------------------|---|
| <b>Drawer</b>        | Auto Populated to KEES Case by ImageNow.    |
| <b>Case Number</b>   | Case Number in KEES. Verify during QA step. |
| <b>Case Name</b>     | Person Name in KEES                         |
| <b>Field 3</b>       | <Undefined Field>                           |
| <b>Received Date</b> | Date document is received.                  |
| <b>Unique ID</b>     | Temporary Unique ID for system.             |
| <b>Document Type</b> | Categorizes a document.                     |



# Imaging: DCF

## Lesson 5: Document Management > Case vs Person

Person level documents follow the person from case to case.

Some of examples include personal identifying documents such as birth certificates, driver's licenses, passports, and social security cards. These documents are indexed at the person level.

The screenshot displays the ImageNow Viewer application. The main window shows a scanned document of a New York State Enhanced Driver License for Mary Split. The license details include: ID: 012 345 678, CLASS D, DOCUMENT, Split, Mary, 2345 ANYPLACE AVE, ANYTOWN NY, 12345, DOB: 05-09-85, SEX: F, EYES: BR, HT: 540, E: NONE, ISSUED: 09-30-08, EXPIRES: 10-01-16. The interface also features a left-hand navigation pane with a tree view of document categories, a top menu bar, and a right-hand properties panel. A pop-up window in the foreground shows the 'Kansas Eligibility Enforcement System (KEES) Indexing eForm' with fields for Case Number (01297096), Case Name (LINDA G O'BRIEN), Document Category (Correspondence), and Doc Type (Correspondence). It also includes a table for applicable and received dates, and buttons for 'New', 'Copy', and 'Remove'.

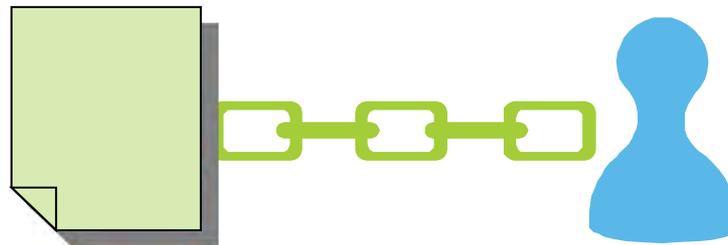
## Imaging: DCF

### Lesson 5: Document Management > 2<sup>nd</sup> Level Person Indexing

2<sup>nd</sup> Level Person Indexing is required for documents containing Personal Identification. These documents are applicable to multiple cases and deemed “durable and portable.”

To complete 2<sup>nd</sup> Level Person Indexing:

- Enter or update the indexing information on the KEES Indexing eForm for all fields that apply.
- May require document splitting.
  - Complete this by selecting the eForm’s New or Copy button and entering the person level information accordingly.





# Imaging: DCF

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

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

The screenshot shows the ImageNow Explorer interface. On the left is a tree view of document categories. The main pane displays a table of documents for the selected 'KEES Case Summary' folder. The table has columns for Drawer, Case Number, Case Name, Person MPI, Person Name, Batch ID, Document Type, Received Date, Pages, and Workflow Queue. The first row is highlighted in red.

| Drawer    | Case Number | Case Name    | Person MPI | Person Name | Batch ID          | Document Type             | Received Date | Pages | Workflow Queue |
|-----------|-------------|--------------|------------|-------------|-------------------|---------------------------|---------------|-------|----------------|
| KEES Case | 20003337    | Caron Sample |            |             | 301YZ2R_007BZN... | Personal Identifying I... | 02/18/2015    | 1     |                |
| KEES Case | 20003337    | Caron Sample |            |             | 301YZ2R_007BZN... | Income                    | 02/18/2015    | 2     |                |
| KEES Case | 20003337    | Caron Sample |            |             | 301YZ2R_007BZN... | Income                    | 02/18/2015    | 2     |                |

At the bottom right of the window, it indicates '1 selected' and '3 documents'.

# Imaging: DCF

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

After double clicking on the Personal Identification Information (PII) document and access the eForm.

The screenshot shows the ImageNow Viewer application with the following components:

- Image Viewer:** Displays a sample Kansas Driver's License for Caron Elizabeth Sample. The license includes the following details:
  - DOB: 11/15/1966
  - SAMPLE CARON ELIZABETH
  - 123 NORTH STREET
  - APT. 2
  - TOPEKA, KS 66612-1234
  - DL LIC. NO. K1234-5678
  - DL EXP. 11/15/2012
  - DL CLASS: A
  - SEX: F
  - HGT: 5-06
  - EYES: I
  - HAIR: BROWN
  - SC12MCF1615A9
- Forms Window:** Titled "Kansas Eligibility Enforcement System (KEES) Indexing eForm". It shows:
  - Case Number: 20003337
  - Case Name: Caron Sample
  - Document Category: Personal Identifying
  - Doc Type dropdown menu with "Driver's License" selected and highlighted in red.
  - Applicable Date: 02/25/2015
  - Received Date: 02/18/2015
- Properties Window:** Shows document keys including:
  - Case Number: 20003337
  - Case Name: Caron Sample
  - Person MPI: [Empty]
  - Person Name: [Empty]
  - Batch ID: 301Y2ZR\_00762EYVW000051
  - Document Type: Personal Identifying Information
- Custom Properties Window:** Shows:
  - Document Category: Personal Identifying Inf
  - Applicable Date: 02/24/2015
  - Received Date: 02/18/2015
  - Created By: T6796513
  - isCategory\_PII: True
  - Barcode ID: [Empty]



# Imaging: DCF

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

Click on the magnifying glass to search for the Selected Case Member Information.

Select a form: KEES Indexing eForm

Refresh Submit

Case Number: 20003337 Case Name: Caron Sample

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

1 results found. Ok Cancel

Selected C



# Imaging: DCF

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

Verify that your case member matches your image. Then select the “Submit” button.

The screenshot shows a web browser window titled "Forms" with a dropdown menu set to "KEES Indexing eForm". The main content area displays the "Kansas Eligibility Enforcement System (KEES) Indexing eForm" logo and title. A "Message from webpage" dialog box is open, asking: "Are you sure you want to route this document forward in workflow to the KEES Doc Reindex queue?". The "OK" button in this dialog is highlighted with a red rectangle. Below the dialog, a table of case member information is visible, with its header row also highlighted by a red rectangle.

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

Buttons: New, Copy, Remove

### The UNKNOWN Drawer

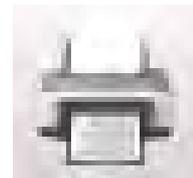
- **First Name** and **Last Name** are required indexing fields. If First and/or Last name is unknown, staff are to enter “Unknown” in the corresponding field(s).
- DCF also has a need to search on location since the UNKNOWN drawer is Statewide and stretches across multiple offices.
- Staff are to enter the Office Location in the First Name field along with the name, for example:
  - *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”*

## Imaging: DCF

### Lesson 5: Document Management > Document Management

The agency will be able to print documents from the ImageNow solution when a consumer has requested them.

**Print Document:** If needed, a document can be printed upon request through the File Menu or Print icon options from the ImageNow Viewer Toolbar.



In Lesson 5, workers learned:

- Document retrieval
- Splitting and copying a document
- Indexing a document to the 2nd Person Level
- Re-Indexing a DCF Non-Medical document to the correct case and document type



- Lesson 1: What is Imaging?
- Lesson 2: Sorting Documents
- Lesson 3: ImageNow Fundamentals
- Lesson 4: Document Processing
- Lesson 5: Document Management
- **Lesson 6: Troubleshooting**



# Imaging: DCF

## Lesson 6: Troubleshooting > Introduction

This unit provides an overview of document management and troubleshooting in the KEES Imaging System.



After completing this lesson, you will learn ways to Troubleshoot issues.



### Troubleshooting

A large part of efficiently mastering any application is learning how to troubleshoot problems effectively.

The first step of any troubleshooting scenario is identifying exactly what the problem is. From there, the end-user can then decide on how best to resolve that issue.

We will detail issues you may come across:

1. Document in Working Status
2. Cannot Find Appropriate KEES Screen for Linking

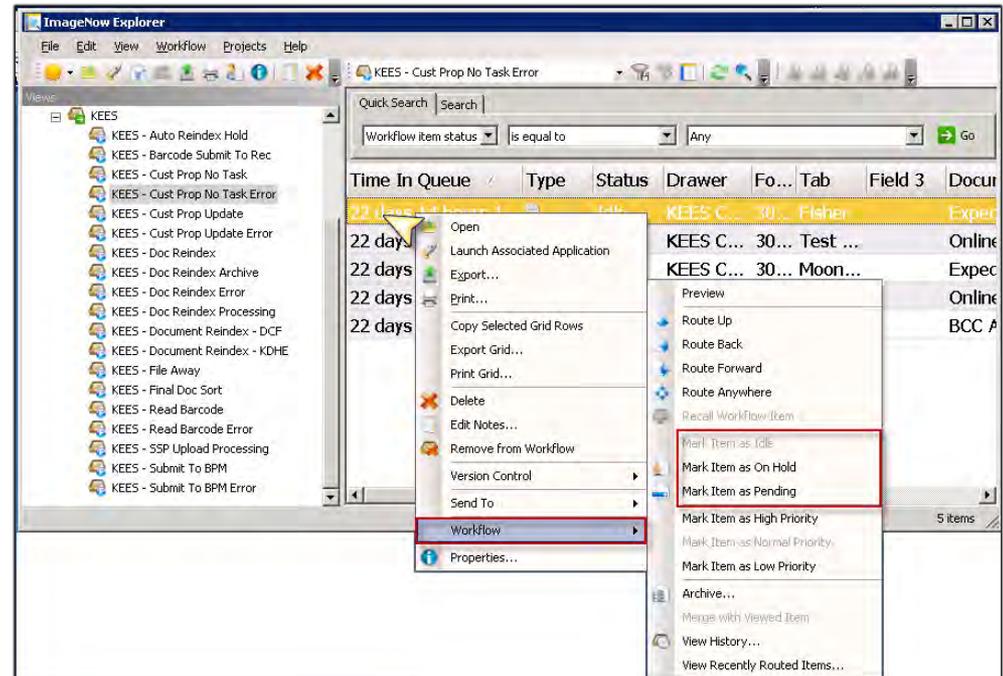




### Issue 1: Document is stuck in Working Status:

This means that a document cannot pass through the workflow because it is locked by another user. There are a few reasons why this may happen.

1. A user may have had this document open when their computer crashed leaving it in a working status.
2. A user may have opened the document, and then left their workstation for an extended period.



### Issue 2: ImageNow Cannot Find The KEES Screen

This issue can be alerted to the user in a variety of ways. The user may receive a dialog box that says something similar to:

*“Could not find an application window or the application plan is trying to use an invalid drawer...”*



In the event that you may see this error you can check the following:

- The Application Plan in ImageNow
- Are you still logged in KEES?
- Check the Unknown Drawer
- Check the specific document drawer

# Imaging: DCF

## Course Summary

In this course, we have looked at:

- The benefits of the KEES Imaging Solution
- Understanding the basic functionality and how it affects day-to-day tasks
- Hot versus Cold document processing
- Lobby processes and cover sheets
- Non-Lobby processes
- Why and how to index to the Unknown drawer

In this course, we have also learned:

- Imaging processes and definitions
- The two ways to capture
- DCF capture profiles to be used for Phase 2
- Setting Default Capture Profiles
- Viewing Applications and Supporting Documents
- Document Management
- Troubleshooting

# Imaging: DCF

## Questions

