

## Job Aid-KEES 2<sup>nd</sup> Level Indexing

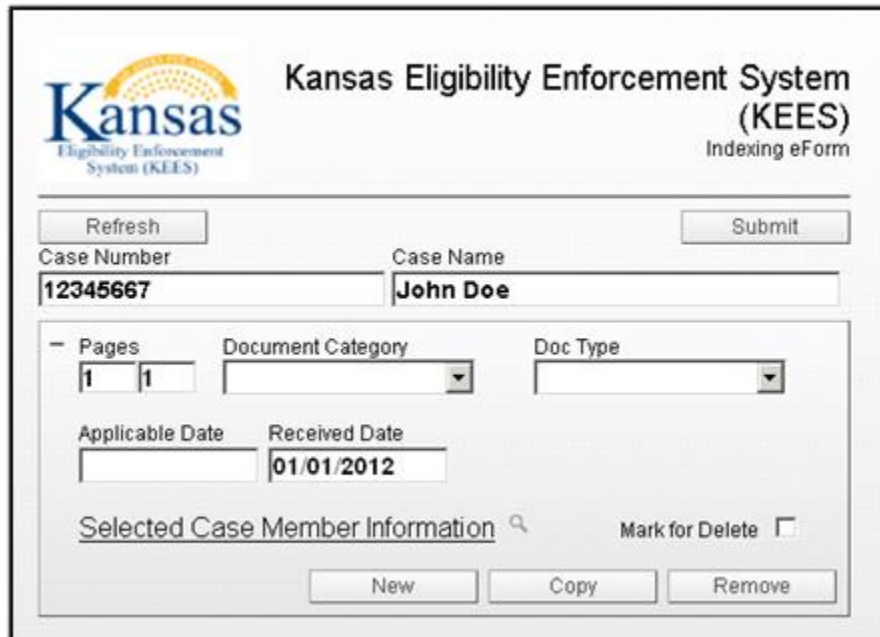
**Objective:** The objective of this job aid is to assist the worker with 2<sup>nd</sup> level indexing of PII (Personal Identifying Information) documents.

**Overview:** Initially all documents are associated to a case. However, KEES was designed to be able to also associate documents with a person. These documents will follow that person from case to case. Examples of PII documents: birth certificates, driver’s licenses, passports, and social security cards. In order to link the PII documents to a person, the worker will need to use the following process:

Use the E-form in ImageNow to re-index the document from the case level to a person level.

### Process of Re-indexing:

1. Open the document that needs to be re-indexed on one monitor. On a second monitor open a KEES instance and pull up the case and navigate to the Case Summary page.
2. In ImageNow, while viewing the document, **press the F12 key on the keyboard**. This should then display the E-form pop-up window in the center of the screen.



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

Refresh Submit

Case Number: 12345667 Case Name: John Doe

Pages: 1 | 1 Document Category: [Dropdown] Doc Type: [Dropdown]

Applicable Date: [Field] Received Date: 01/01/2012

Selected Case Member Information  Mark for Delete

New Copy Remove

3. The Application ID should pre-populate where the case number is located if you are not already in the context of the case in ImageNow. If you are already in the correct case number in ImageNow, the case number will already be populated. Type in the correct case number as appropriate. The case name should then update/pre-populate. If it does not, **click on the Refresh** button until it displays the appropriate case name.

**Note:** Often, the PII documents are imaged as one complete document with multiple pages. Therefore, the ES will need view each page in the document to ensure that the correct pages are associated with the correct case person.

4. Confirm the page number(s) the user would like to re-index. Enter the page number(s) into the Pages section of the E-form window.
5. Select the Document Category: **PII Personal Identifying Information**.
6. Select one of the following document types in the **Document Type** dropdown menu.

Birth Certificate	Driver's License
Social Security Card	Immunization Record
Photo ID	Birth Verification Information
Indian Tribal Document	Military Record
Certificate of Naturalization	Declaration of Citizenship
Passport	Immigration Document
Personal Identifying Information	

7. **Click the search icon next to the Selected Case Member Information hyperlink.** A Case Member Search window will pop up.

**Case Member Search**

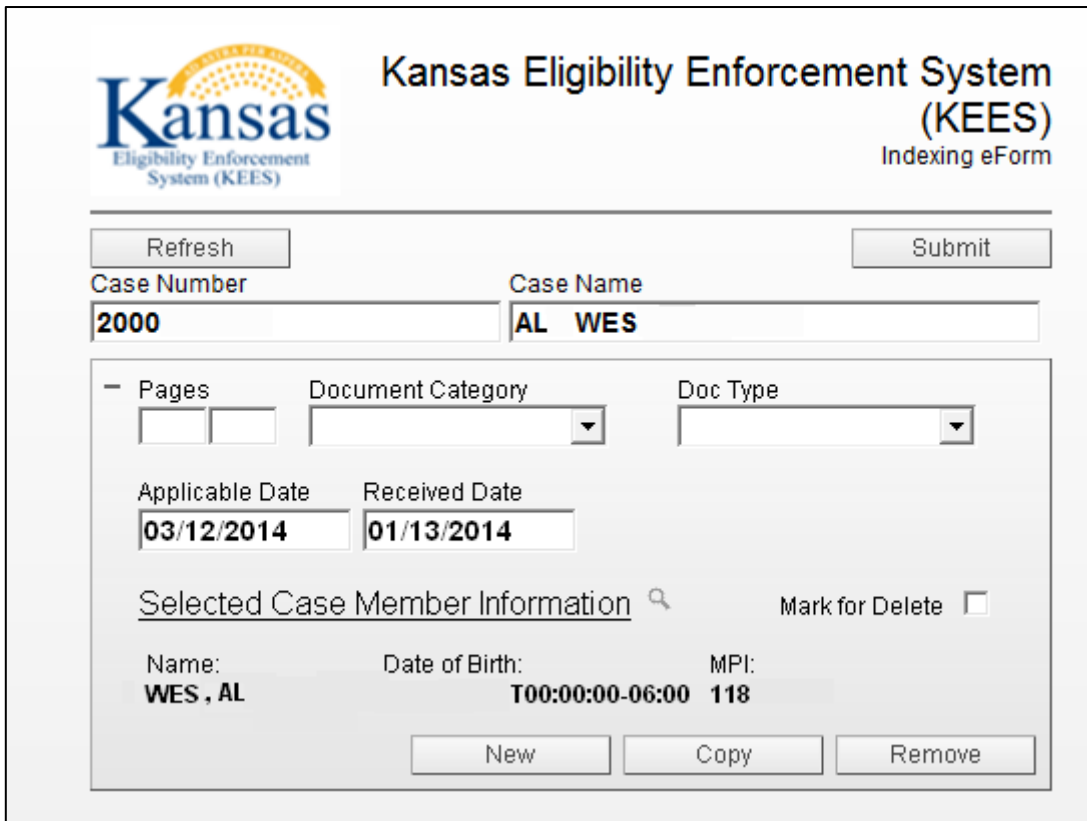
First Name	Middle Name	Last Name	DOB	MPI	SSN
AL		WES	T00:00:00-06:00	118	
MAI		MAR	T00:00:00-06:00	187	

2 results found.

Ok

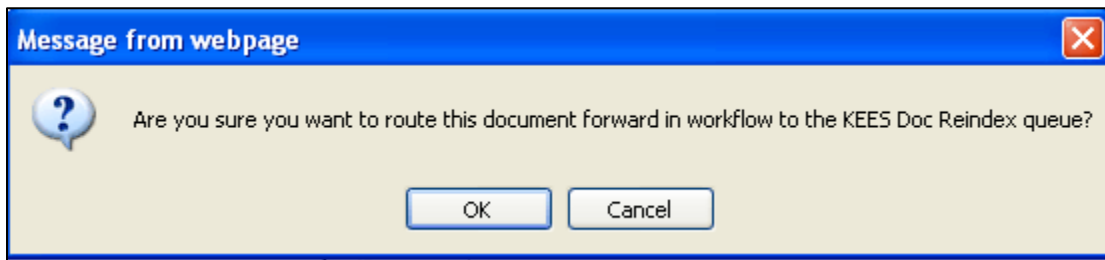
Cancel

8. Click on the individual's name the document will be indexed to. Then Click OK  
The E-Form window will then update to reflect the individual's name at the bottom of the window.



The screenshot shows the 'Indexing eForm' interface for the Kansas Eligibility Enforcement System (KEES). At the top left is the KanCare logo, and at the top right is the text 'Kansas Eligibility Enforcement System (KEES) Indexing eForm'. Below this are 'Refresh' and 'Submit' buttons. The form contains two input fields: 'Case Number' with the value '2000' and 'Case Name' with the value 'AL WES'. A section titled 'Selected Case Member Information' includes dropdown menus for 'Pages', 'Document Category', and 'Doc Type'. Below these are date fields for 'Applicable Date' (03/12/2014) and 'Received Date' (01/13/2014). A search icon and a 'Mark for Delete' checkbox are also present. At the bottom of this section are three buttons: 'New', 'Copy', and 'Remove'. The member information displayed is: Name: WES, AL; Date of Birth: T00:00:00-06:00; MPI: 118.

9. Once complete **click the submit button.**
10. **Select OK** in the next pop-up window. This should be the confirmation that the user wants to re-index this document.



Confirming this process will then prompt ImageNow to move the document to the re-indexing queue and then to the subsequent folder that it should be in.

**11. End of Process.**