# 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: 2nd 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.

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.

Hot
Documents
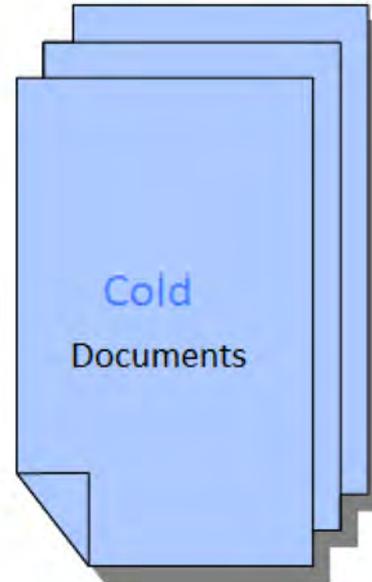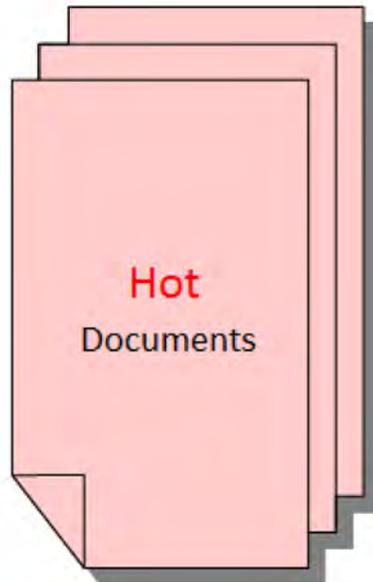
Cold
Documents

**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 For example, supporting documentation from a lobby interview, historical documents, and/or file only documentation.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.**
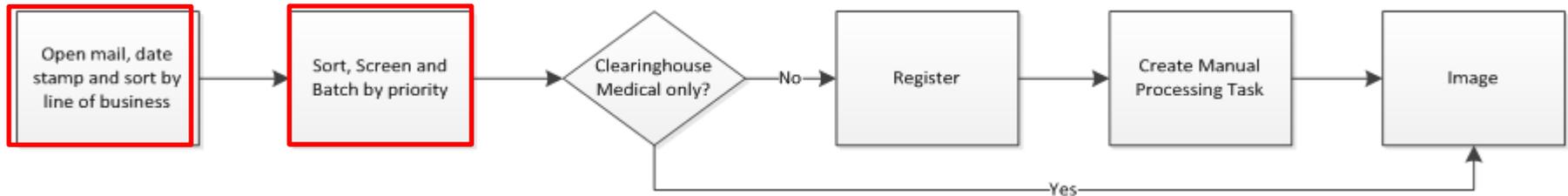
- Open mail, date stamp the front of each page, and then sort by the line of business (e.g. EES, VR, PPS, APS, CSS, Legal, Operations, LIEAP, and Administration).
- EES Documents:
  - Apply screening criteria:
    - Acceptable signature
    - "Big 4" criteria for Medical
    - Expedited Food Assistance
  - 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

## Lesson 1:  KEES Business Process
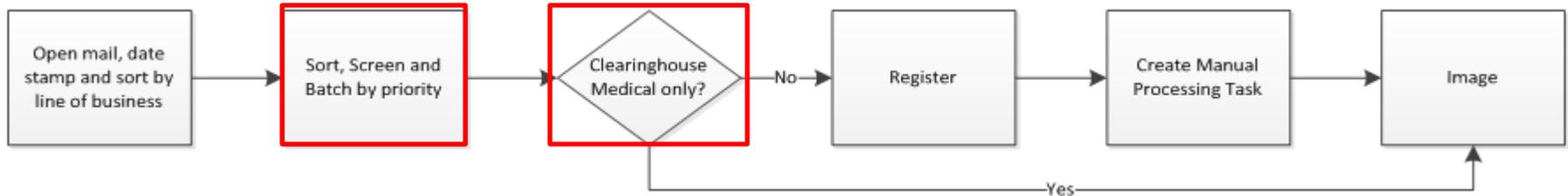


- Batch in groups of 25 (if applicable) with completed Non-Lobby Tracking Sheet
  - Paperclip documents received in the same envelope together (e.g. an application with all supporting documents is considered 1 "envelope", loose mail from the same client includes paystubs, utility bill, and school records, 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

## Lesson 1: KEES Business Process
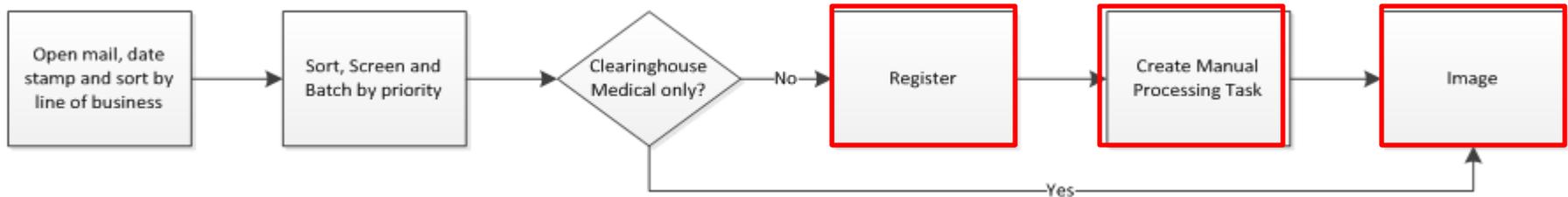


- Register DCF Non-Medical and Medical applications, reviews, and interim reports.
  - Write Case Head and Case # on documents
  - Place document batch in the **HOT Imaging Basket**.

- 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

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

**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**

DCF Non-Medical:
*Image using "DCF Non-Medical" application plan*
☐ Application

DCF Medical:
*Image using "KEES Case" application plan*
☐ Application

Clearinghouse:
*Image using "KEES New Application(s)" application plan*
☐ Expedited PW KanCare Application
☐ KanCare Application
☐ Potential CH Application *Route back to DCF*
☐ Unsigned CH Application
☐ Urgent Need KanCare Application
☐ 3100/3100.1 EXP PW Application
☐ 3100/3100.1 Medical Application
☐ 3100/3100.1 Urgent Medical Application

☐ 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*

RECEIVED DATE:

SCANNED DATE:

PROCESSED BY:

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.

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

| KAECSES | KEES | KSCares |
|---|---|---|
| Case Head: | Case Head: | Case Head: |
| Case #: | Case #: | Case #: |

**PRIORITY:**
- ☐ HOT
- ☐ COLD

*Outstationed Workers Only:*
- ☐ Ready for 60 Day Retention

**AGENCY:** **Image medical before non-medical**
- ■ DCF
  - ☐ DCF Non-Medical
  - ☐ KEES Case
- ■ Clearinghouse
  - ☐ KEES New Application

**DCF Document Types:**
- ☐ Application
- ☐ IR
- ☐ Non-Medical Review
- ☐ Review *Medical
- ☐ Work Programs
- ☐ Loose Mail

*Index to appropriate document type*

**Clearinghouse Document Types:**
- ☐ Expedited PW KanCare Application
- ☐ KanCare Application
- ☐ Potential CH Application *Route back to DCF
- ☐ Unsigned CH Application
- ☐ Urgent Need KanCare Application
- ☐ 3100/3100.1 EXP PW Application
- ☐ 3100/3100.1 Medical Application
- ☐ 3100/3100.1 Urgent Medical Application

RECEIVED DATE:

SCANNED DATE:

PROCESSED BY:

QUANTITY:

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.

- Lesson 1:  KEES Business Process
- **Lesson 2:  ImageNow Basics**
- Lesson 3:  Imaging- CH Application
- Lesson 4:  IN Printing- CAPP Application
- Lesson 5:  2nd 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
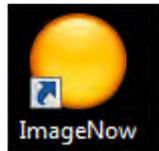


**Log in** to ImageNow
- KEES User name
- Password
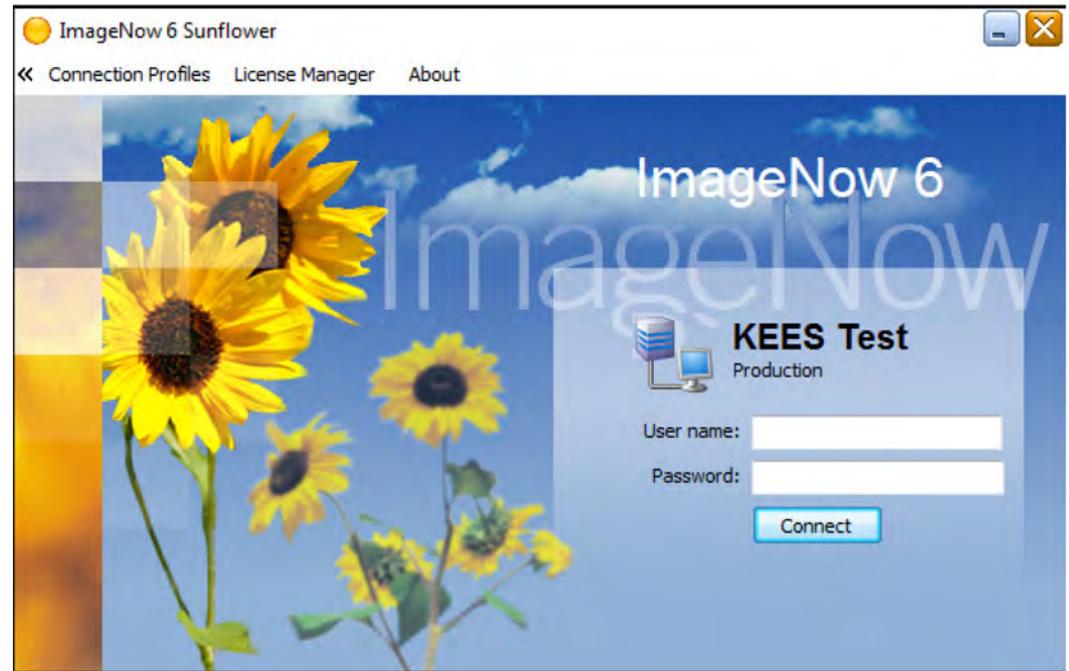
Locate the **Capture** button. Set **Package Mode** as the default. DCF will always use **Package Mode** when capturing physical documents. This allows an individual to scan several types of documents for the same case at one time.
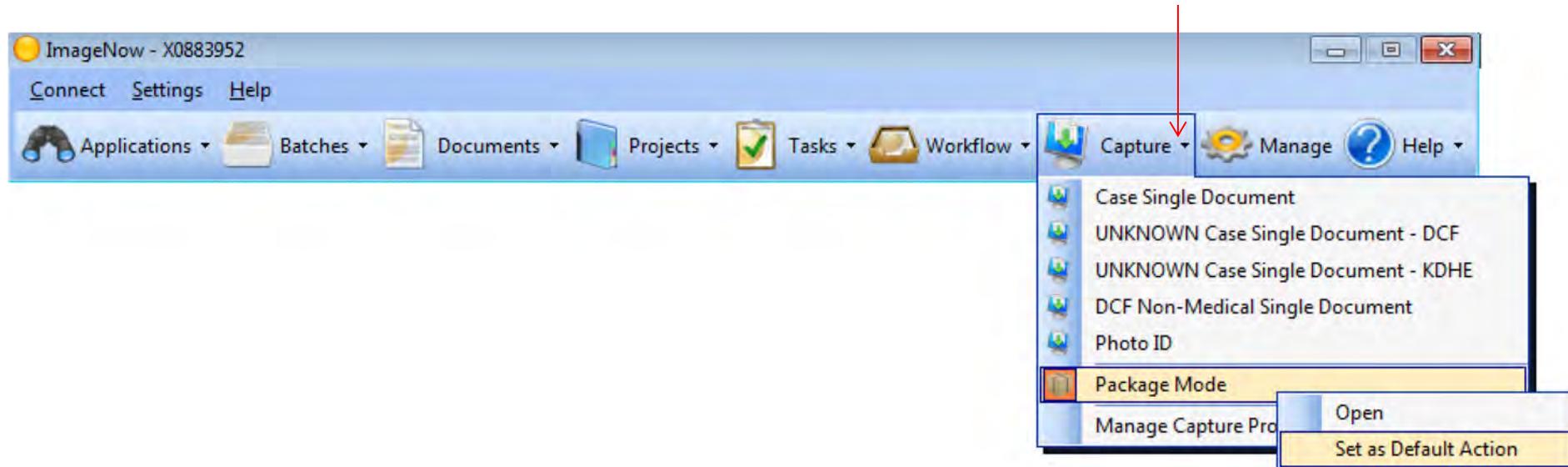


Once "Package Mode" is set as the default, the worker will not need to set this again unless using a different imaging station.

## Application Plan
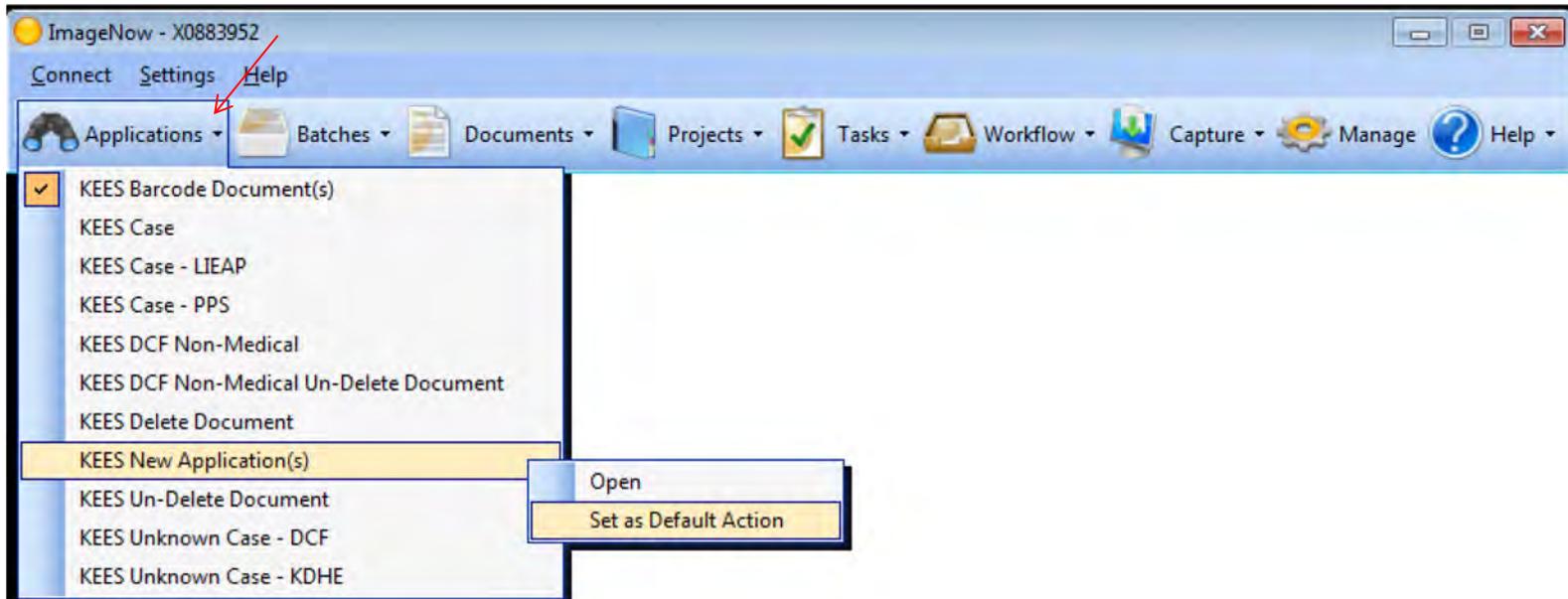


On the ImageNow toolbar, navigate to the **Applications** drop-down menu and click the caret to select the desired Application Plan.

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:**
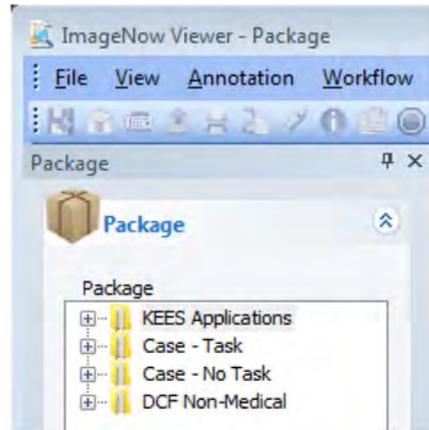


- **KEES Application:**  Used to route work to the Clearinghouse.  All tasks will be automatically generated by the image with a due date, task name and assigned queue.
- **Case- Task:**  Not used by DCF during Medical Go-Live.
- **Case- No Task:**  Used for DCF medical programs and PPS medical programs.  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 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"

## 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: 2nd 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

## 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.

**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

**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**

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☐ 3100/3100.1 Urgent Medical Application

☐ 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*

RECEIVED DATE: 04/08/2015

SCANNED DATE: 04/08/2015

PROCESSED BY: Mary Smith

Access ImageNow
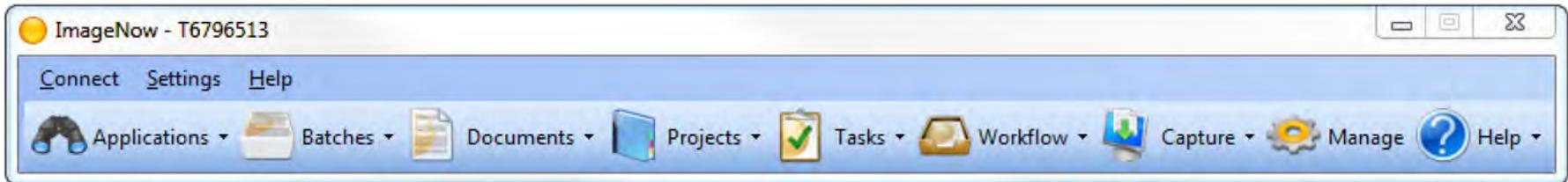


Set **KEES New Application(s)** as the default application plan.
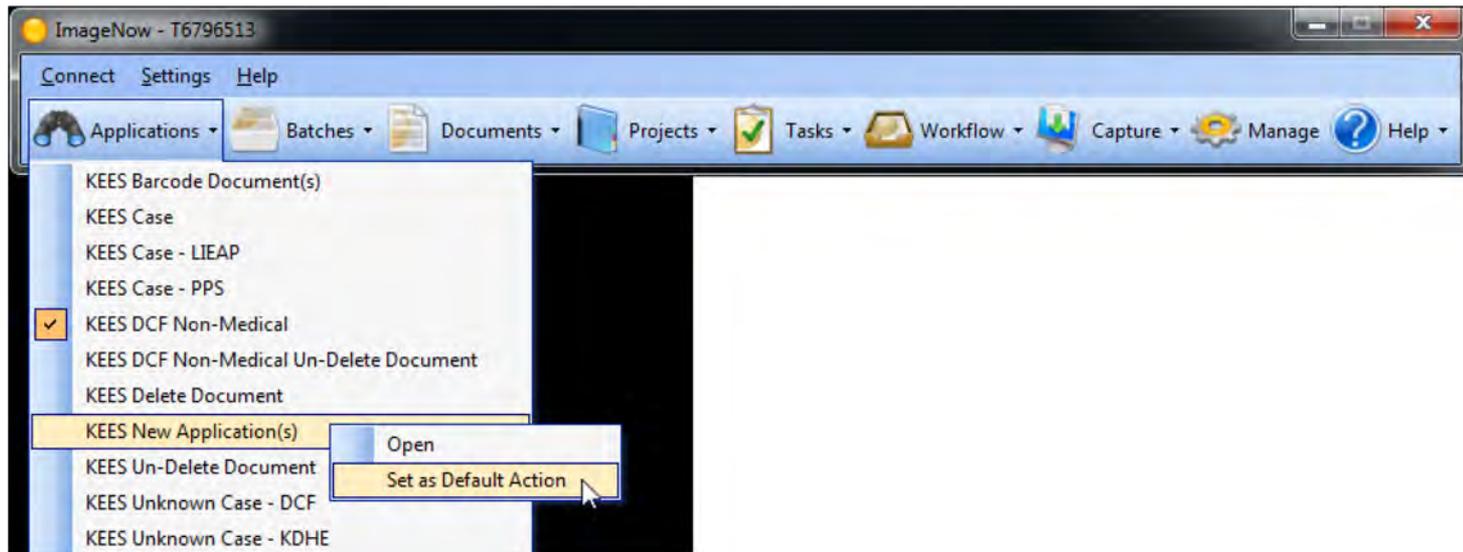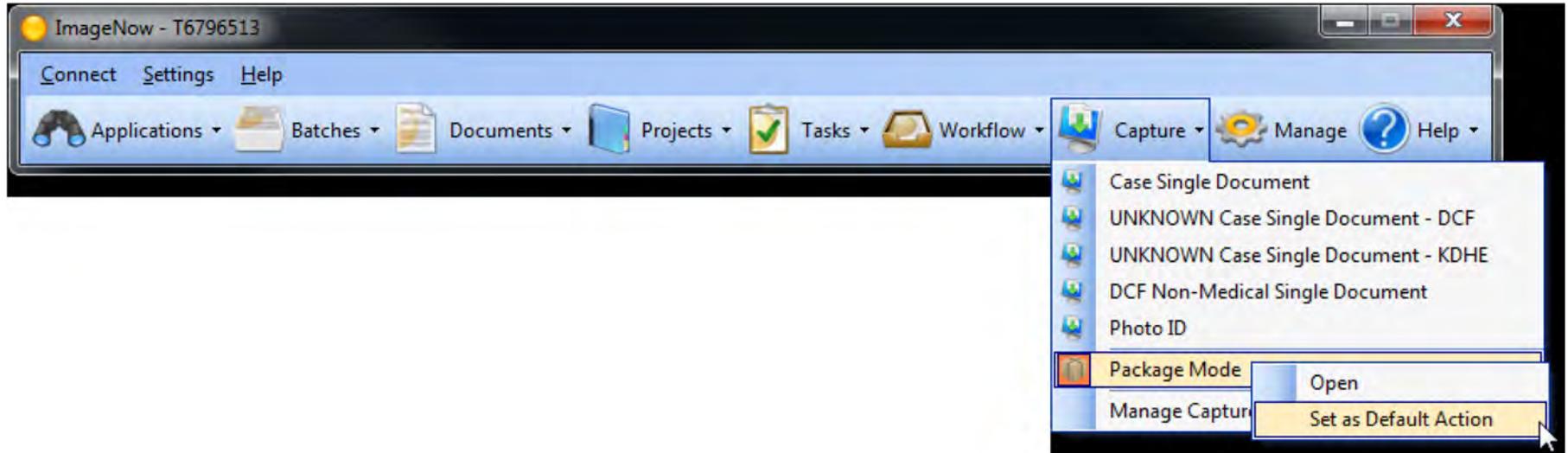
Check the Capture Profile to verify that it is set to Package Mode.

The **Type Last Name Here:** dialog box will display.  Enter the applicant's last name and click the **OK** button.
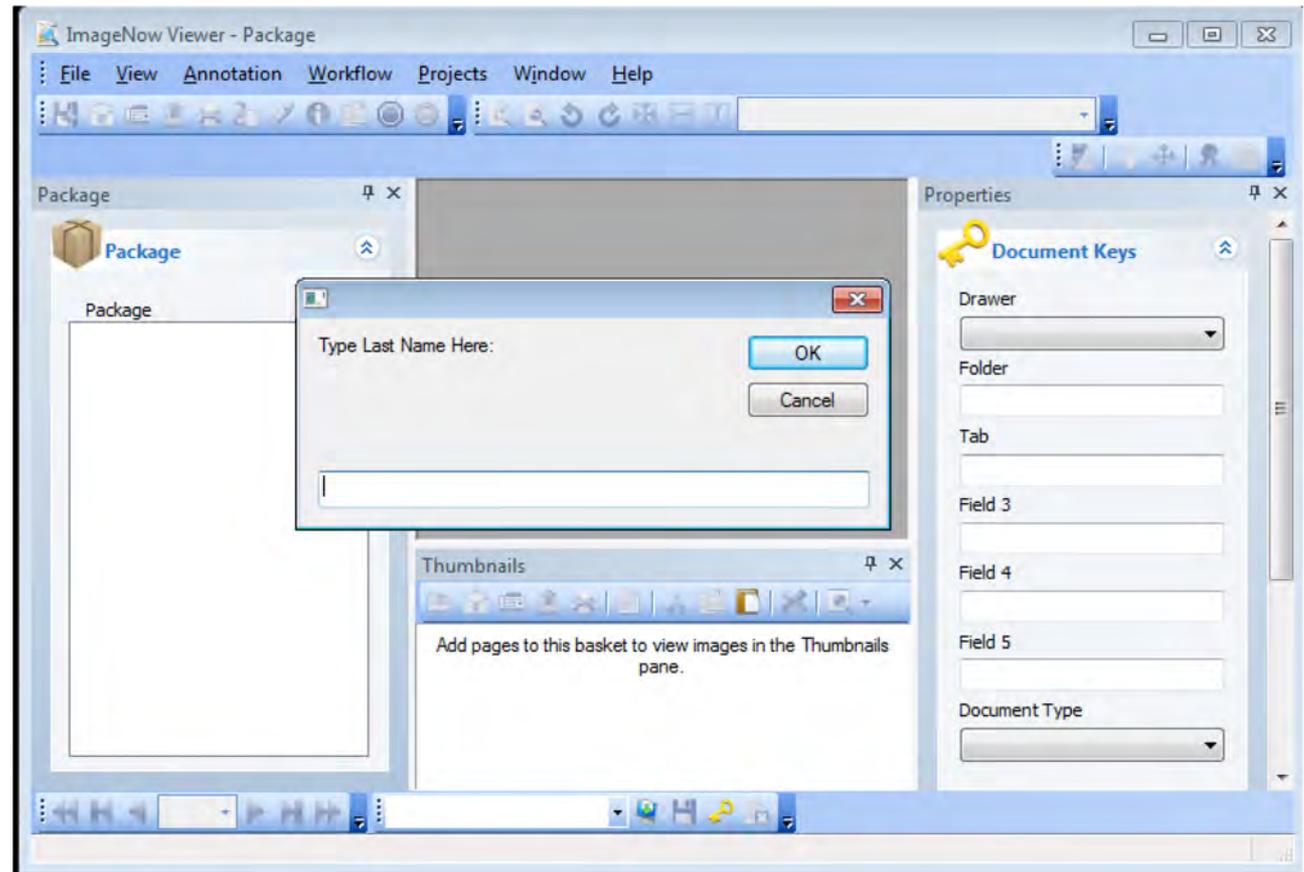
The **Enter Received Date** dialog box will display with the current date populated. Workers will need to update that field to the date that the document was date stamped and then click the **OK** button.
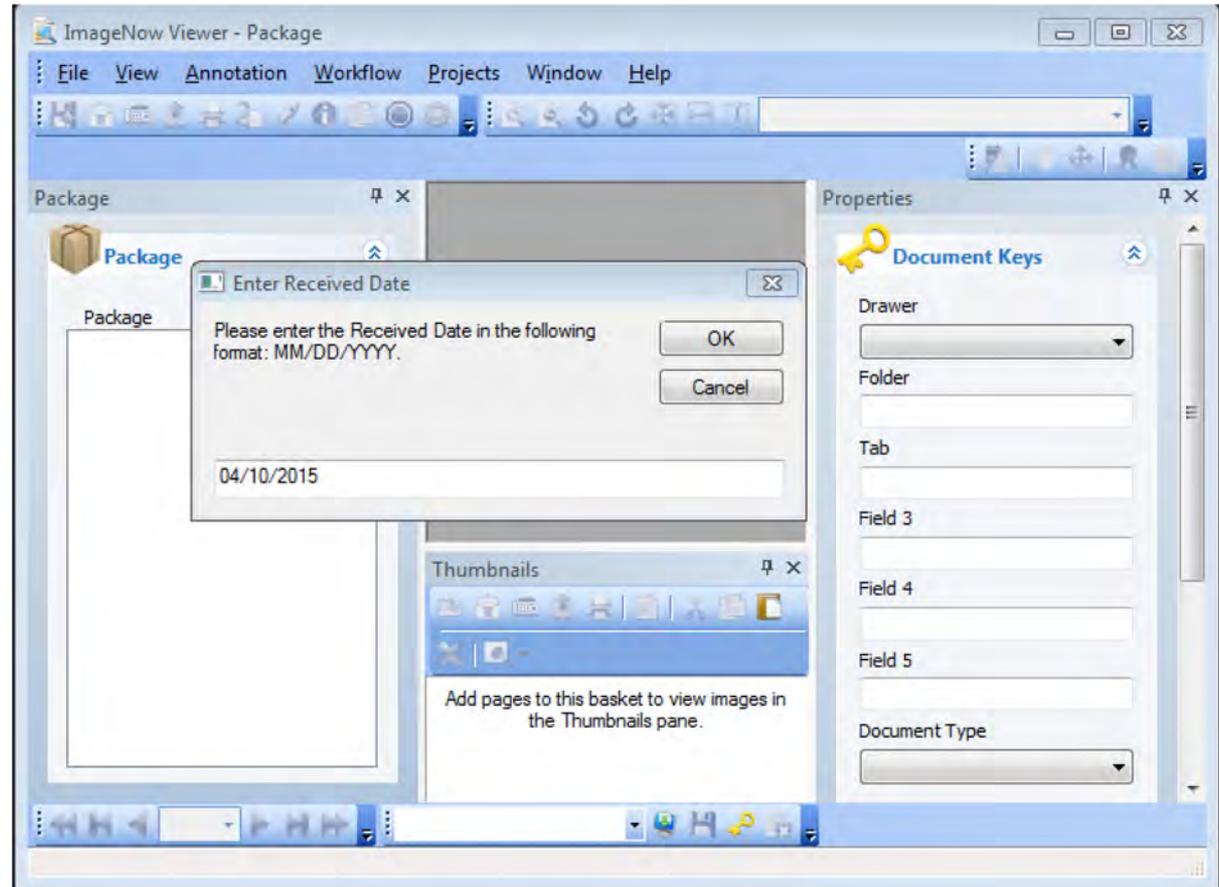
On the **ImageNow Viewer-Package** screen, the **Document Keys** dialog box will display with the Last Name and Received Date boxes filled in. Workers will need to update the date to the correct received date (must match the date stamp) if they did not do so in the previous step.
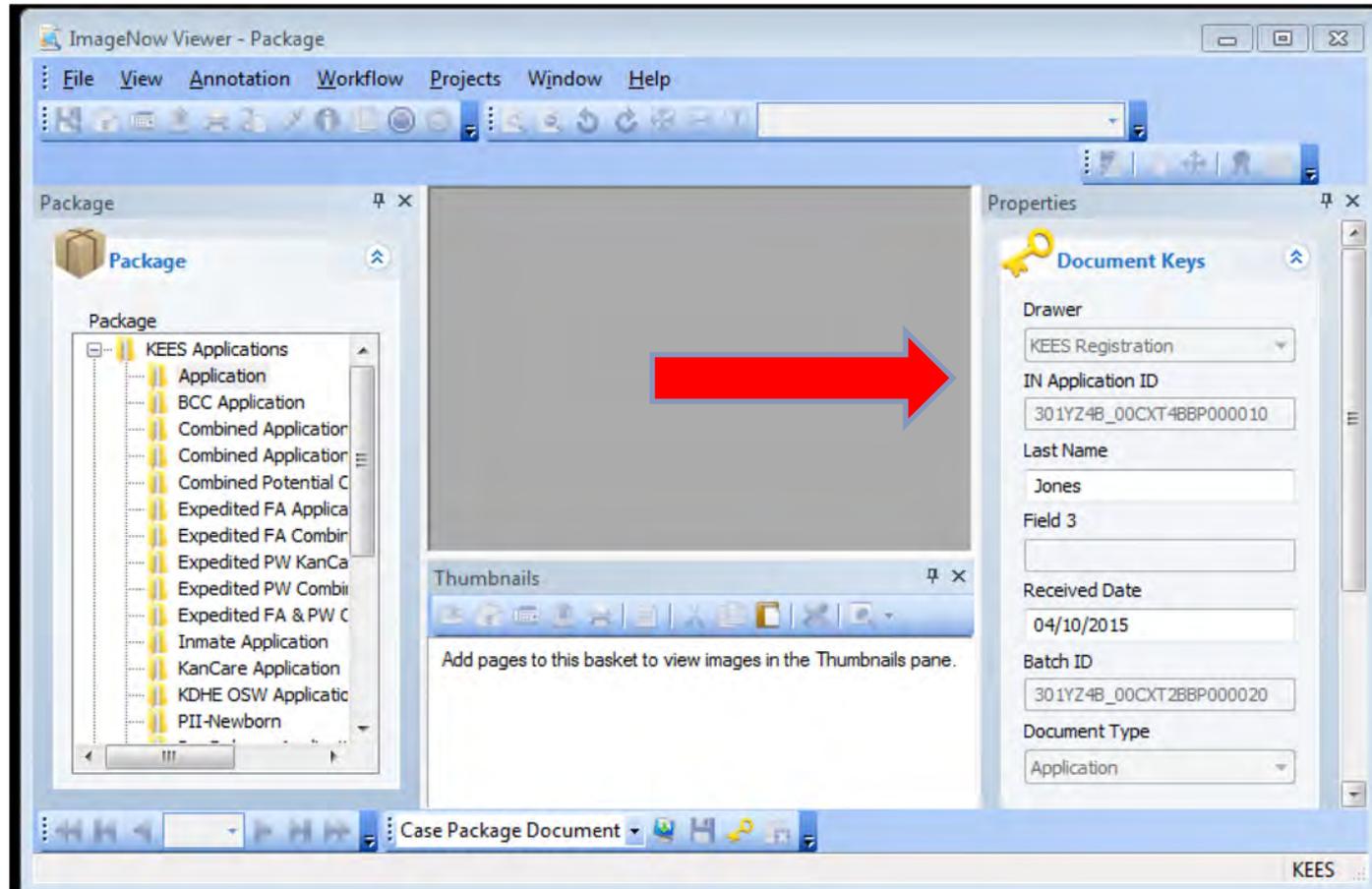
Select the appropriate Clearinghouse Document type in the **KEES Applications** basket (i.e. KanCare Application)
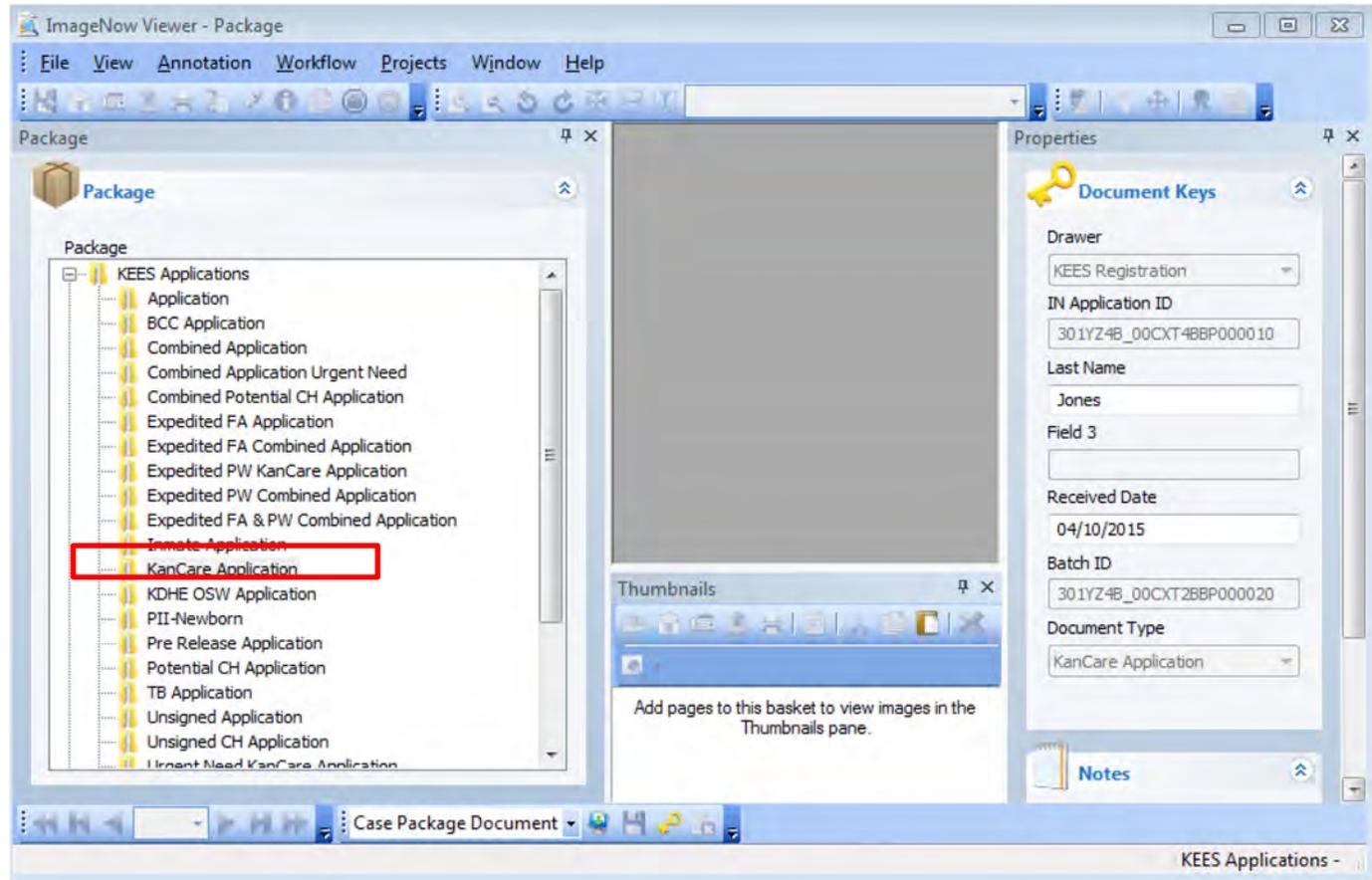
Load the application and all the consumer's supporting paper document in the scanner.

Click the **Capture** icon on the bottom of the screen.
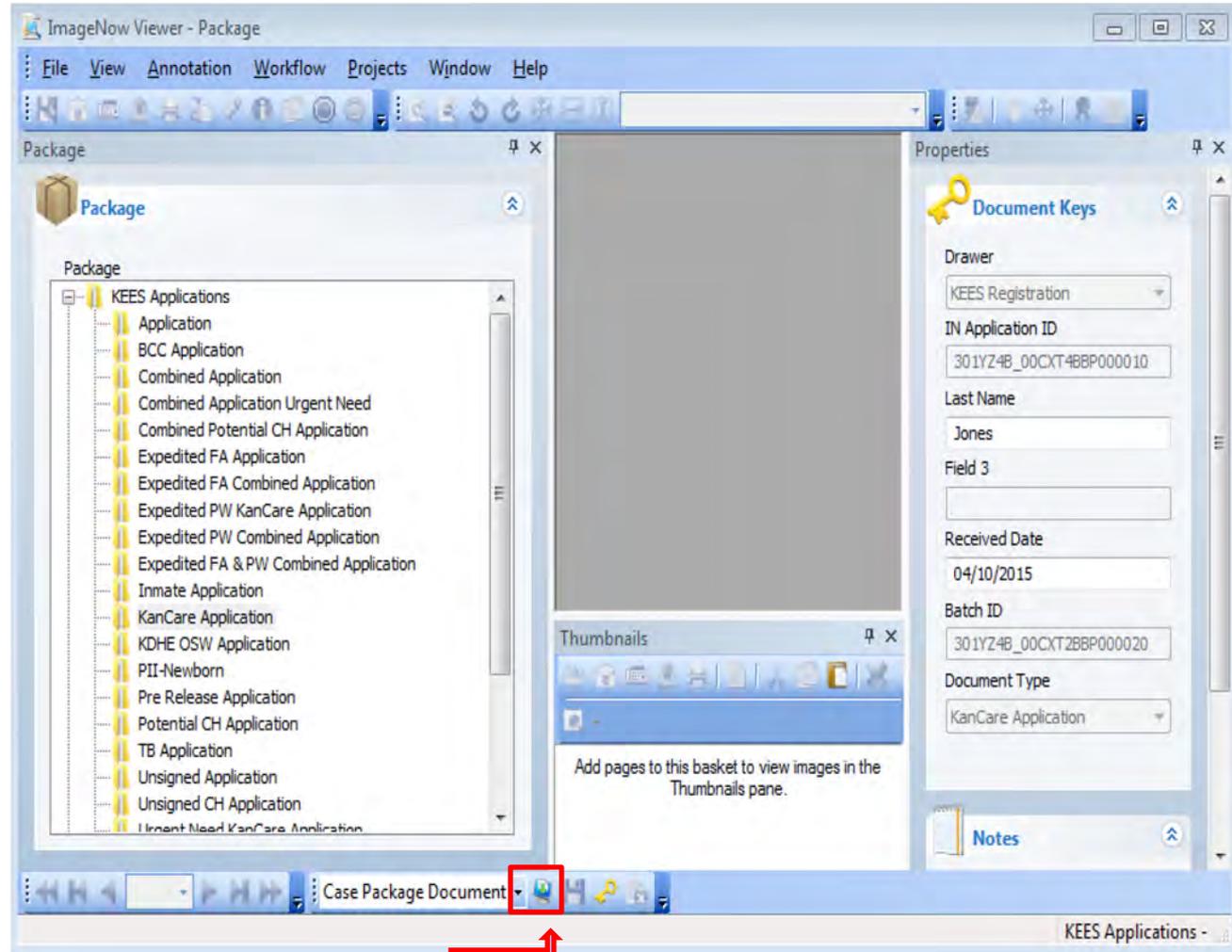
The scanned image will go directly into the document type that was selected and will appear in the ImageNow Viewer. Quality Assurance should be used to visually confirm the captured image(s) are of good quality and that all documents are captured and indexed to the correct case information.
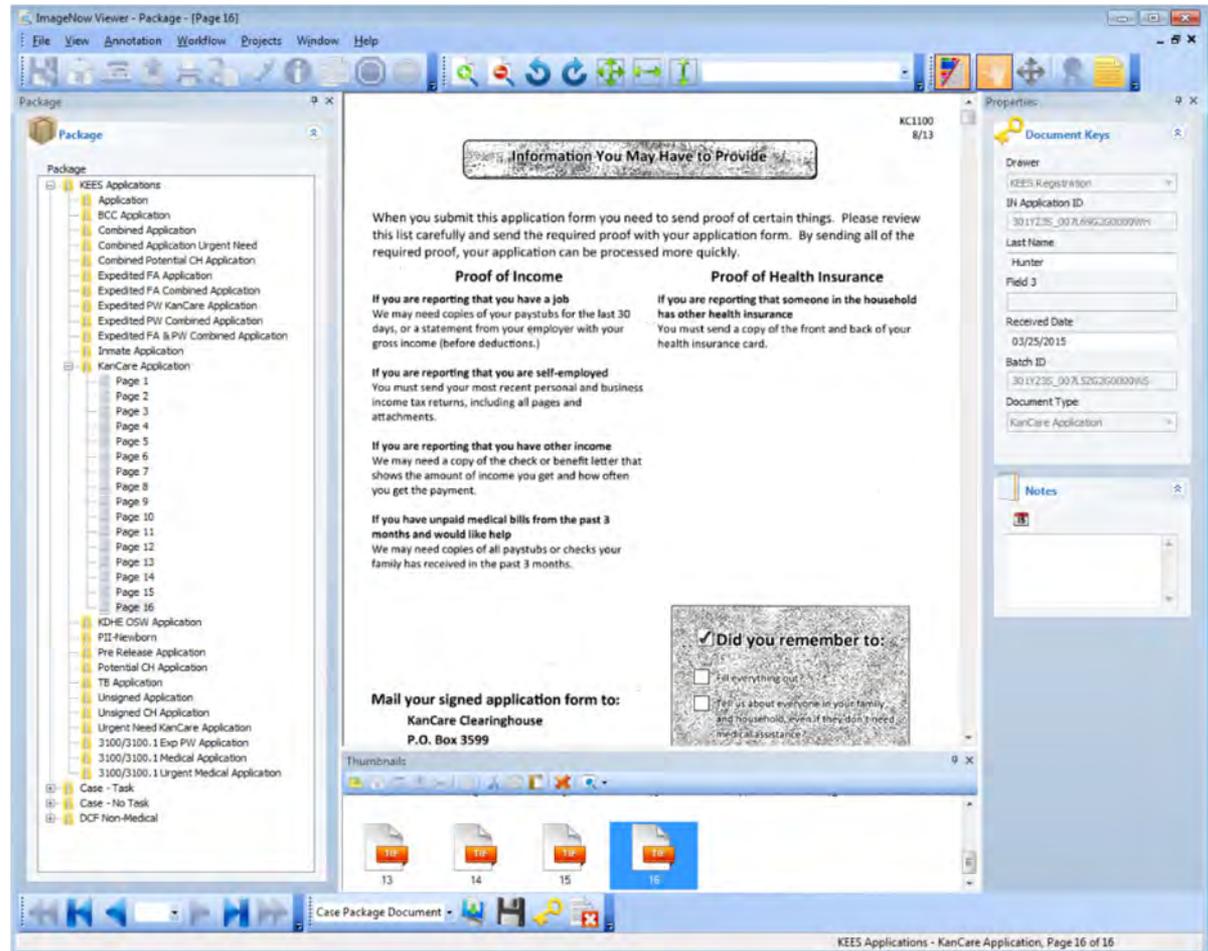
Click the **Submit** button. The document(s) will be indexed to the **KEES Registration Documents** drawer and a task will be created for the Clearinghouse to register the application.

**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.*

#### Application Document Types

**DCF Non-Medical:**
*Image using "DCF Non-Medical" application plan*
☐ Application

**DCF Medical:**
*Image using "KEES Case" application plan*
☒ Application

**Clearinghouse:**
*Image using "KEES New Application(s) application plan*
☐ Expedited PW KanCare Application
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☐ 3100/3100.1 Medical Application
☐ 3100/3100.1 Urgent Medical Application

☐ 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*

RECEIVED DATE:

SCANNED DATE:

PROCESSED BY:

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.

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.
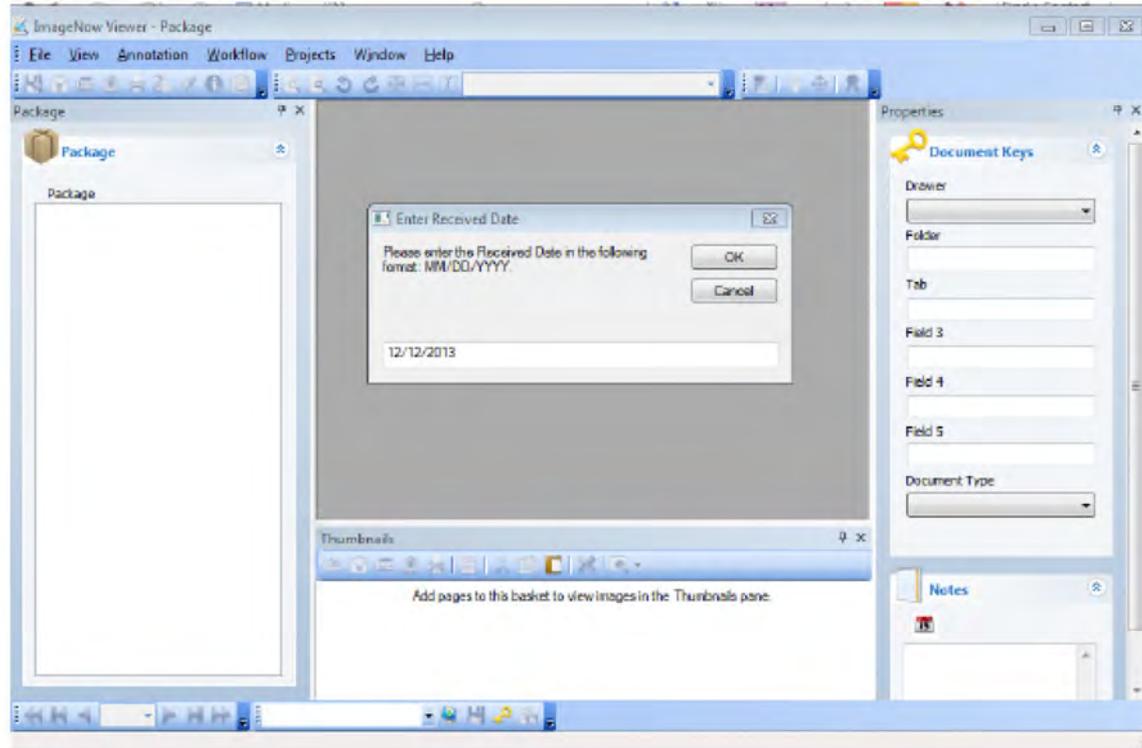
Enter Received Date- must match date stamp.

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.
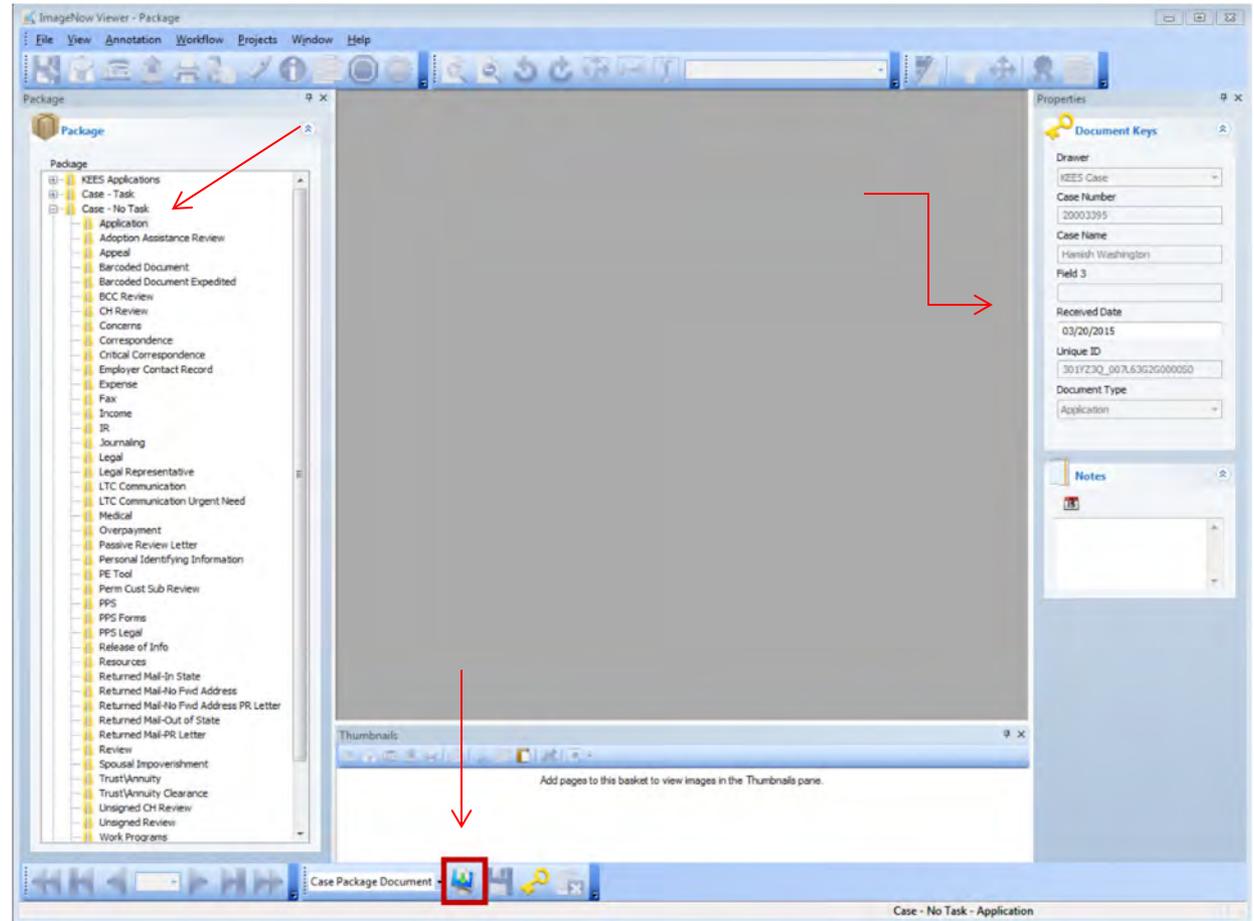
The image of the application displays in the **ImageNow Viewer**. Quality Assurance should be used to confirm the image(s) are of good quality and all documents are captured and indexed to the correct case.
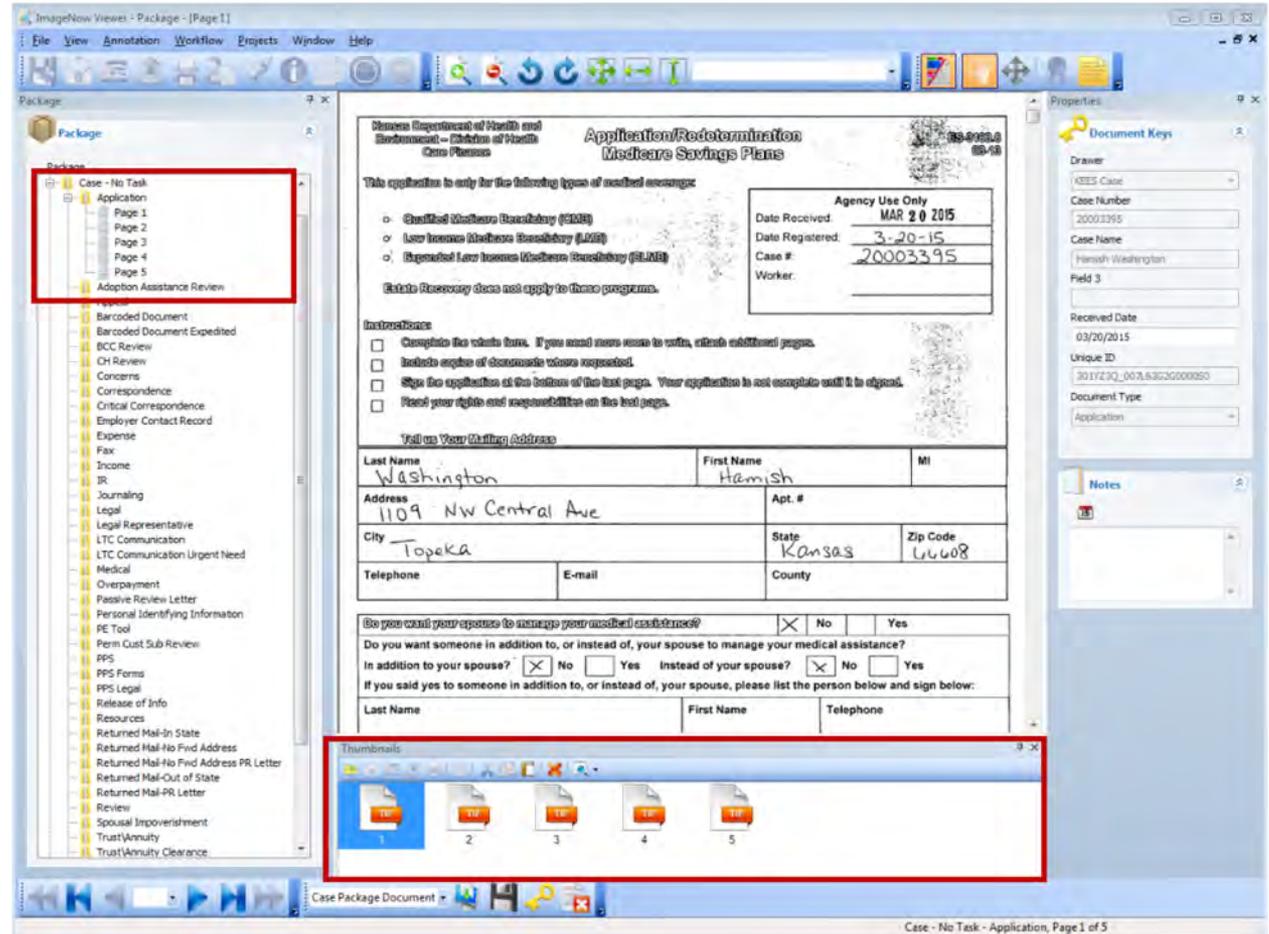
If needed, drag and drop the supporting document(s) to their appropriate document type(s). Once everything is correct, click the **Submit** icon on the bottom of the screen.

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: 2nd Level Indexing/Copy a Document

**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

Access the CAPP system to pull up the application.
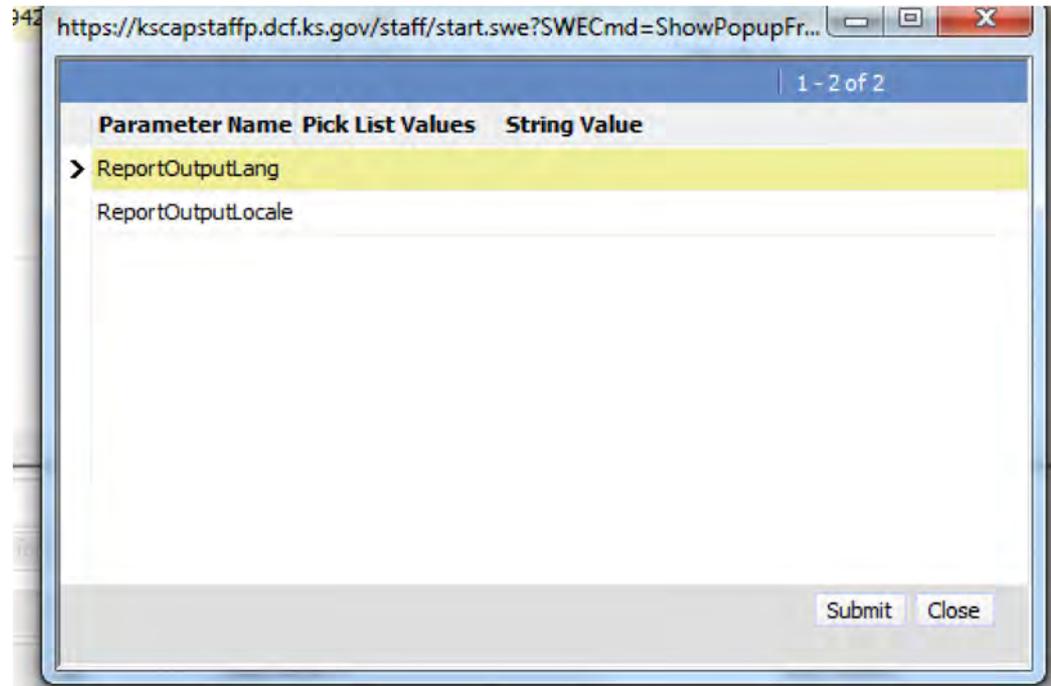
Click the **Submit** button.
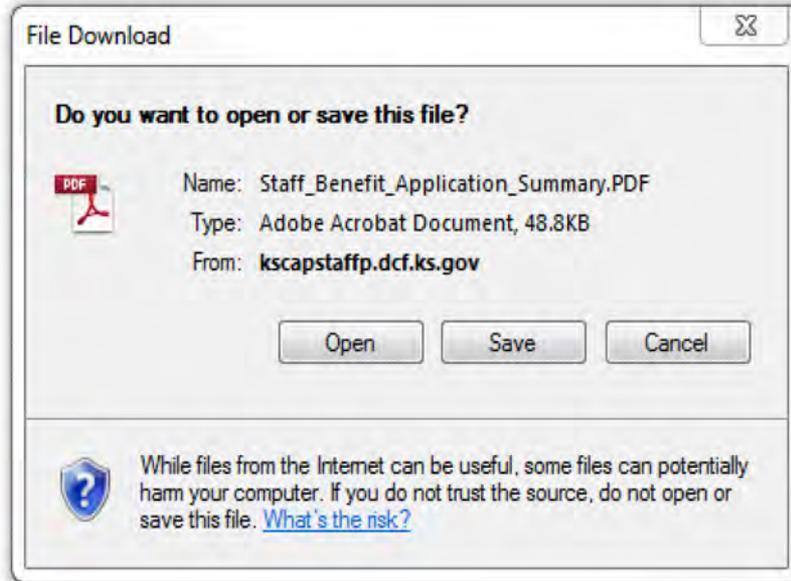
The **File Download** dialog box displays.  Click **Open**.  The image of the application displays.

A worker will need to change their printer to "ImageNow Printer" and then click the **Print** button on the bottom of the page.
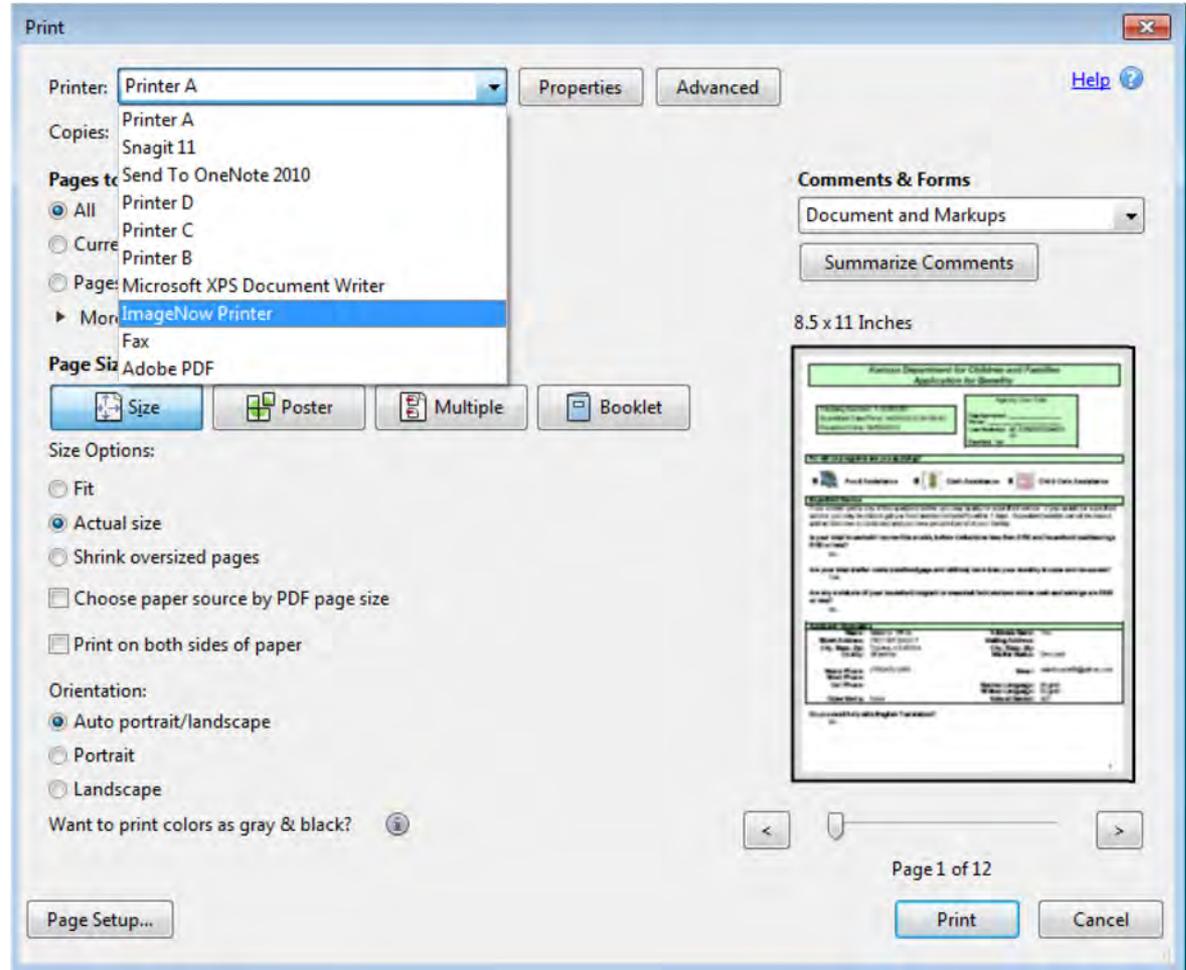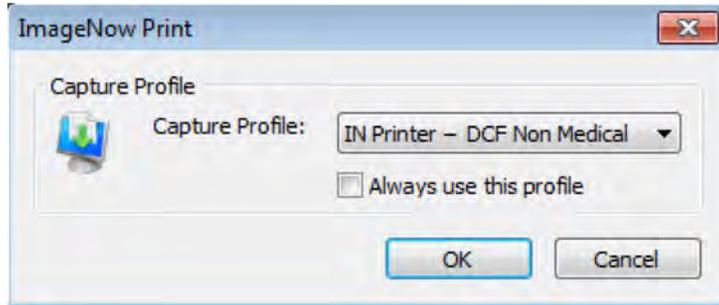
The Capture Profile dialog box will display. Choose "IN Printer- DCF Non Medical" from the menu drop-down and click the **OK** button.

The **Enter Received Date** dialog box will display with the current date populated. Update the date to the received date as applicable.
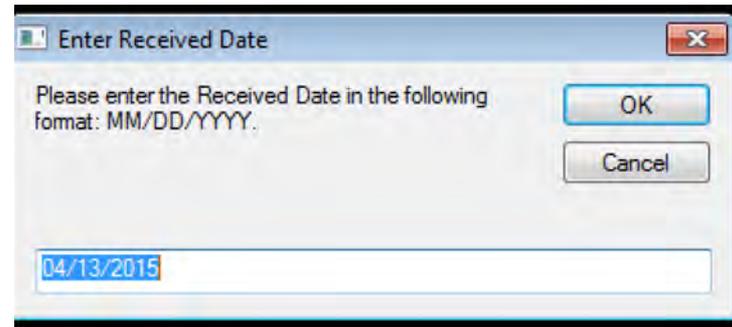
## Lesson 4: IN Printing > CAPP Application



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.

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.
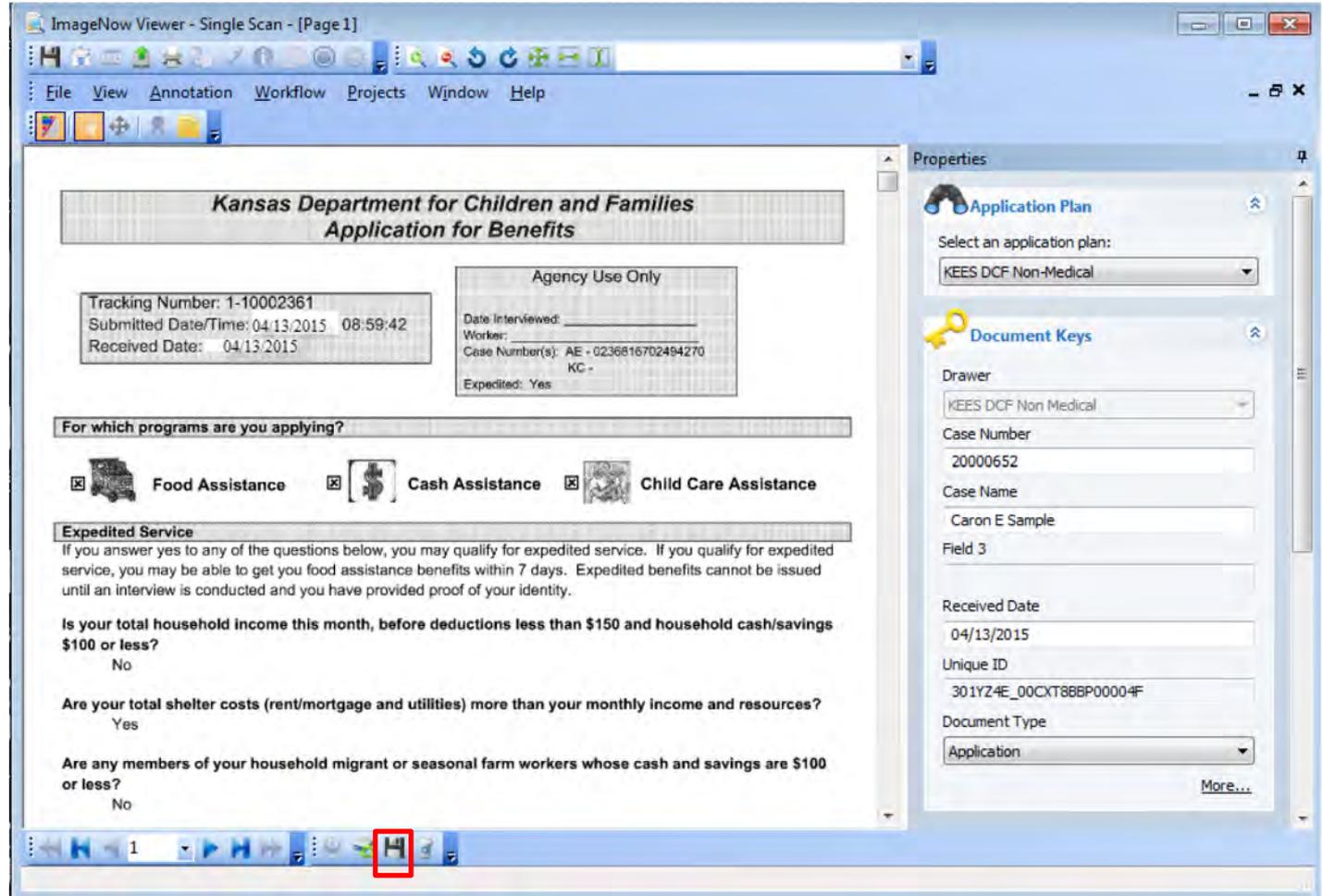
## Summary

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

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

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

**2nd 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.

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

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.

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.

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

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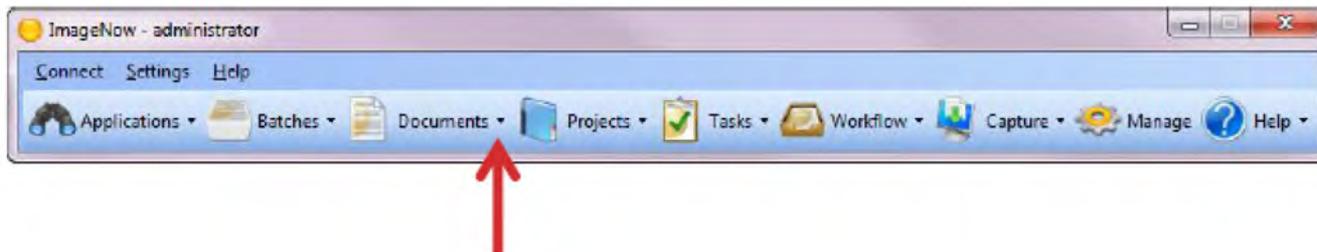


Click on **Documents** to retrieve all documents stored in ImageNow. Document View allows the user to search for documents that are within a specific, pre-determined criteria and/or security group.

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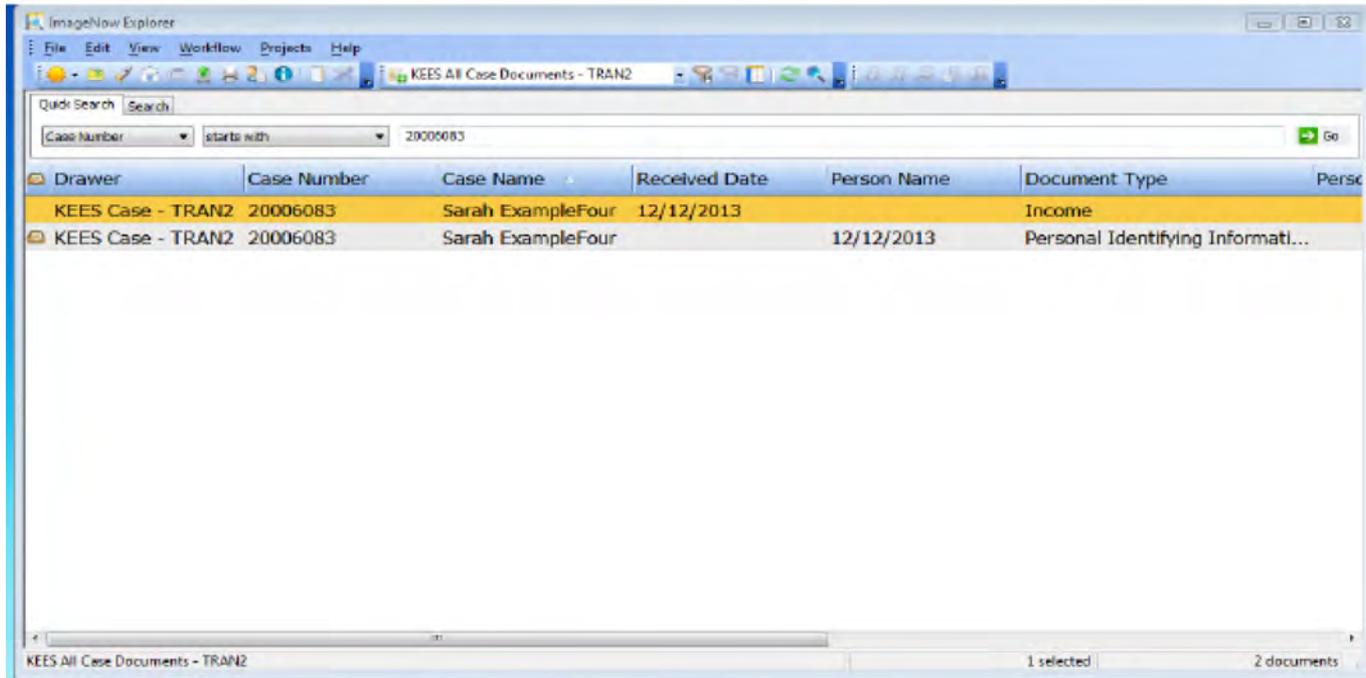
Using ImageNow Document Search, **KEES All Case Document** document view, locate documents imaged to the KEES case. Enter the KEES case number and click **Go**. From ImageNow Explorer, open income **Document Type** by double clicking on the document.

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 KAECSES 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.

## Summary

- We have just learned how to index to the 2$^{nd}$ level for personal identification information on medical cases.

- We have also looked at how to locate, retrieve and copy a document.

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?