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

Imaging: DCF

Agenda

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

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

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.

* DCF Service Center

- Statewide Access
- Real-time access to Case File
- Streamlines ICTs
- Cross Program Case Files

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

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

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

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

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

Imaging: DCF

Agenda

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

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

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

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.
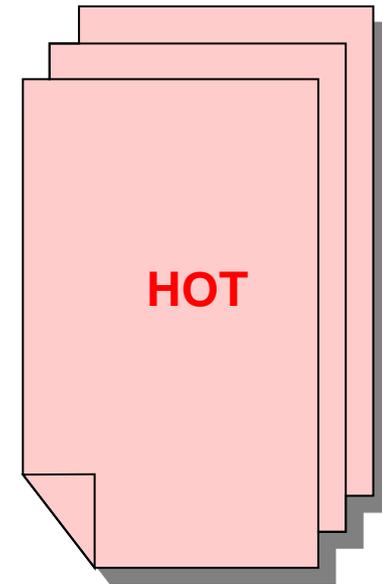
Medical Application

- 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)

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

- 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

Step 1	Step 2	Step 3
Support Staff will Date Stamp the Returned Envelope	Batches it and Delivers to the Purple Area	HSS will process the returned mail in either KAECSES or KEES

Step 4	Step 5	Step 6
Case Number and Case Head is written down on Returned Envelope	Attach the Non-Lobby Imaging Tracking Sheet	Documents are placed in the Cold Basket
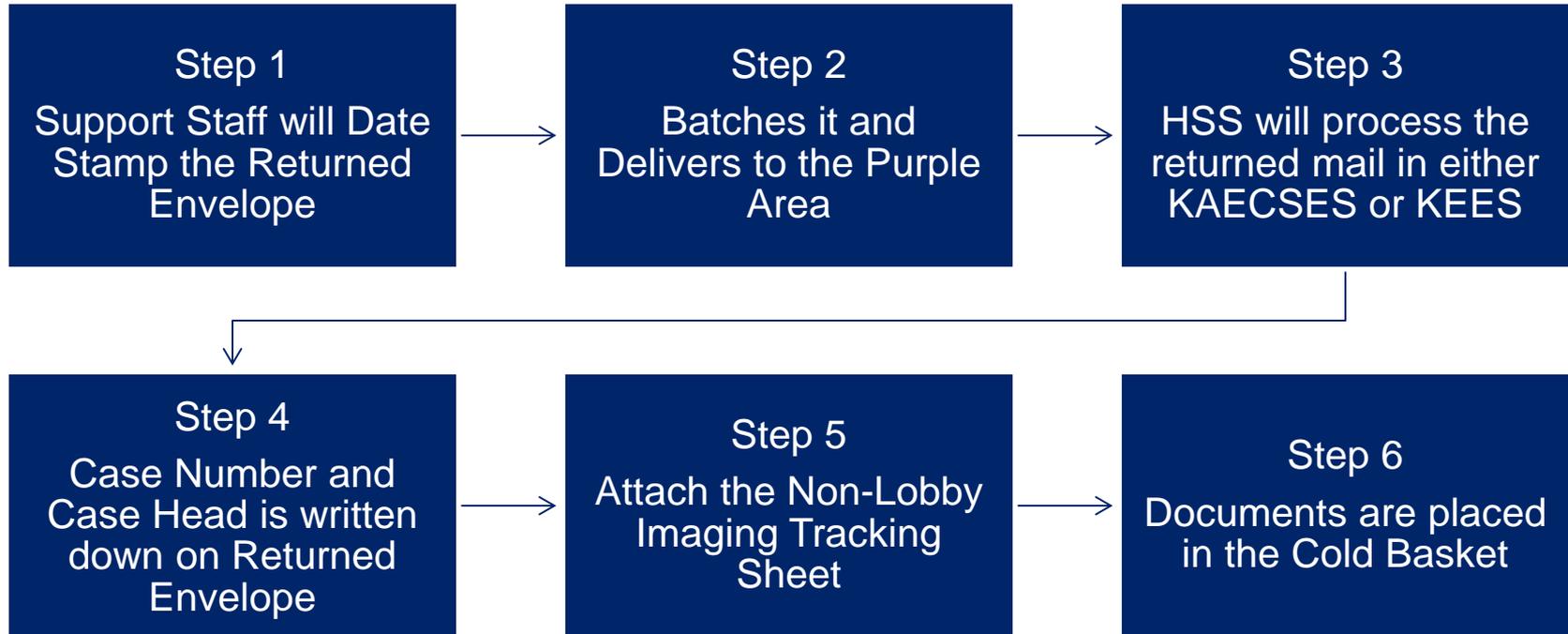
Document Types

Returned mail-in state

Returned mail-out of state

Returned mail-no forwarding address

Returned mail-no forwarding address PR letter

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

Imaging: DCF

Agenda

- 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

Launch ImageNow
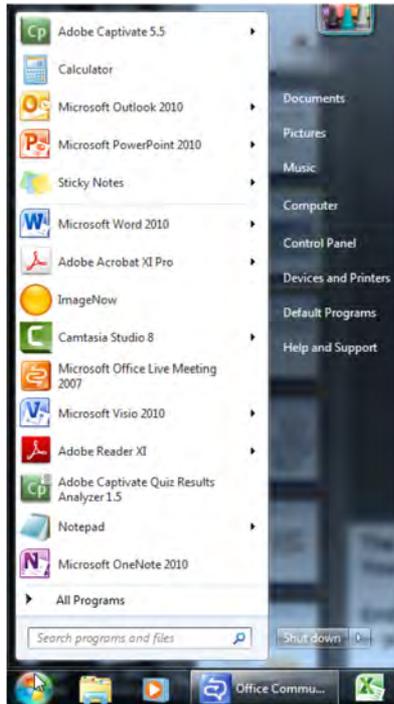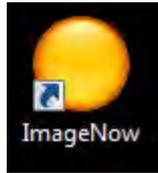
To Log-In to ImageNow
> > KEES Username
> > Password

Imaging: DCF

Lesson 3: ImageNow Fundamentals > Toolbar
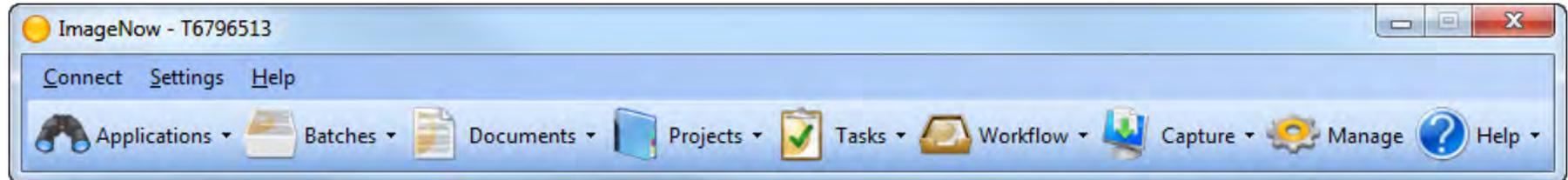
ImageNow Toolbar

> Easy Access to All ImageNow Software

> Configured to Users' Business Role
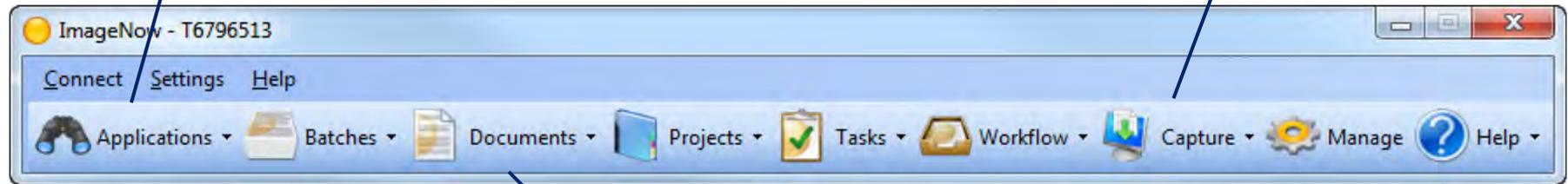
Setting "Default" Capture Profile & Application Plan

A user needs to set the appropriate default Capture Profile and Application Plan to help make document capture most efficient.
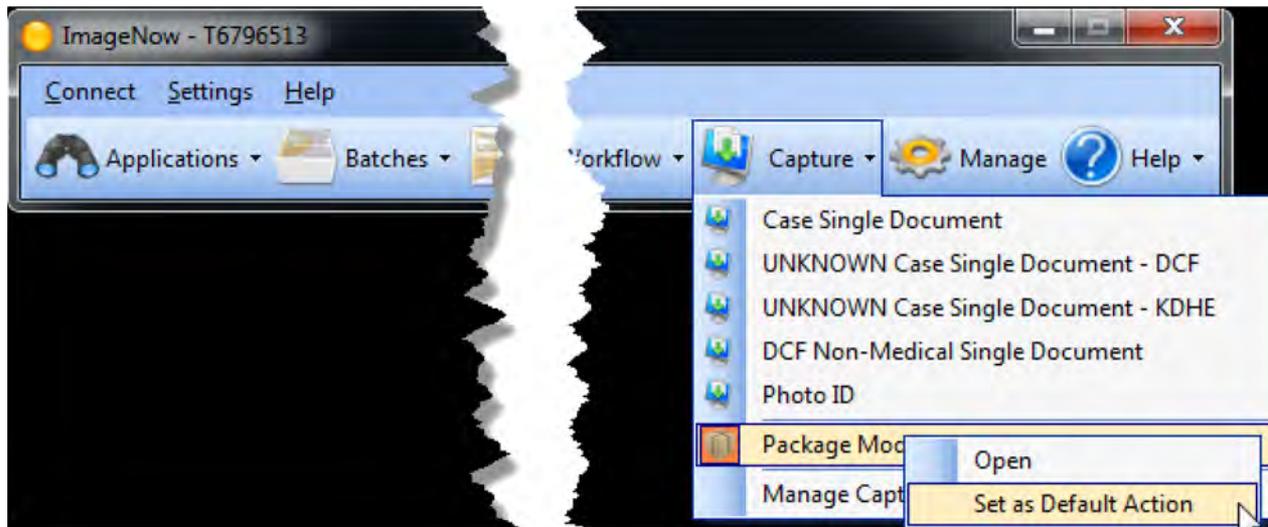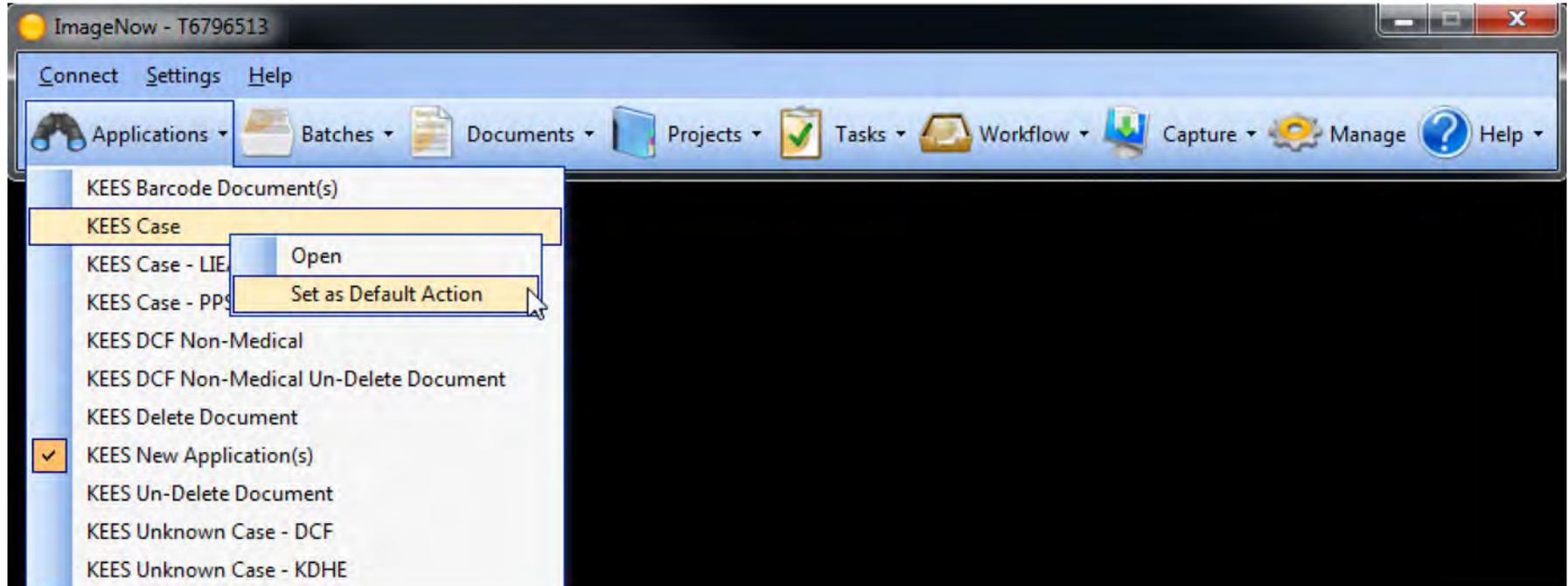
In Lesson 3, you learned:

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

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

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 matter 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

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.

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.

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.	• Case Number • Case Name • Received Date • Unique ID • Document Type	Use on any document tied to a medical program and the Case Number is known.	Registered E&D Applications E&D Reviews Returned Mail Medical Loose Mail

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.	• Case Number • Case Name • Received Date • Unique ID • Document Type	Use on any document related to a PPS medical program and the Case Number is known.	• PPS Forms • PPS Legal Documents • Personal Identifying Information

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.	• IN Application ID • Last Name • Received Date • Batch ID • Document Type	Always use the "KEES New Application(s)" application plan when imaging unregistered applications or when routing an application to the Clearinghouse.	• Unregistered Medical or Non-Medical Applications. • Applications routed to the Clearinghouse.

Manual Application Plan

Application Plan	Description	Indexing Fields	When to use	Document Examples
KEES DCF Non-Medical	To index DCF Non Medical Document.	• Case Number • Case Name • Received Date • Unique ID • Document Type	On any document tied to a non-medical program and the Case Number is known.	• Registered Non-Medical Applications • Non-Medical Review • IR • Returned Mail • Non-Medical Loose Mail.

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.	• First Name • Last Name • SSN • Received Date • Fax Number/Email Address • Document Type	Used when a document is received at a DCF Office and cannot be tied to a person and or Case.	Any document

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

Lesson 4: Document Processing > IN Printer

IN Printer	Definition
IN Printer – Case	Documents that have a Case Number in KEES.
IN Printer – Case No Task	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.
IN Printer – PPS Case	PPS related documents that have a Case Number in KEES.
IN Printer – Unknown Case – DCF	DCF related documents that don't have a Case Number in KEES.
IN Printer – Unknown Case – KDHE	KDHE related documents that don't have a Case Number in KEES.
IN Printer – DCF Non-Medical	Non-medical related documents that are non-medical related documents and have a separate DCF managed Case Number.
IN Printer – UNKNOWN Case – LIEAP	LIEAP related documents that don't have a Case Number in KEES.

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.

Check your Capture Profile to verify that it is set to Package Mode.
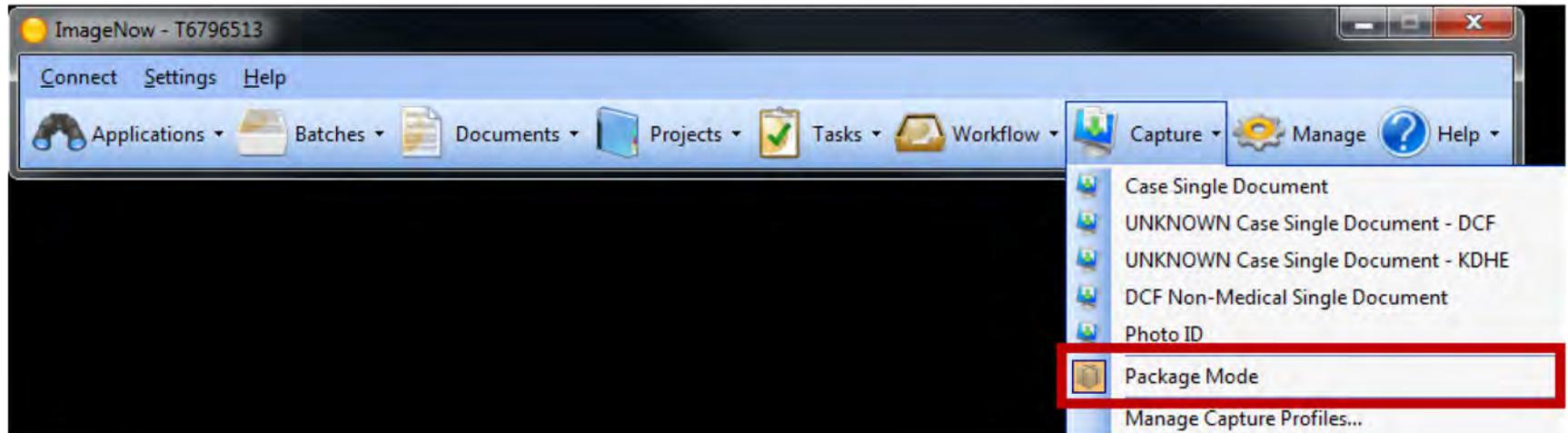
Next, you should make sure your Applications Plan reflects KEES Case for this process.
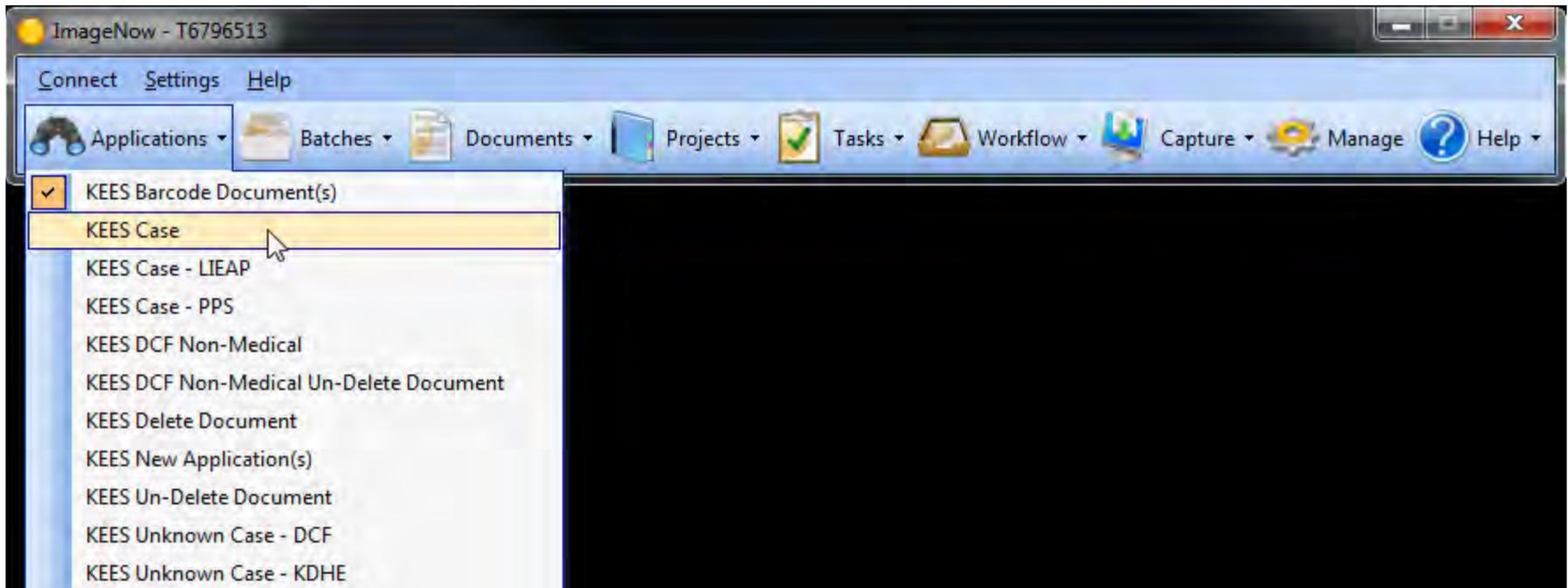
Next navigate to the appropriate case on the KEES Case Summary Page

Select your document from your inbox and open the document.

Select File then Print.

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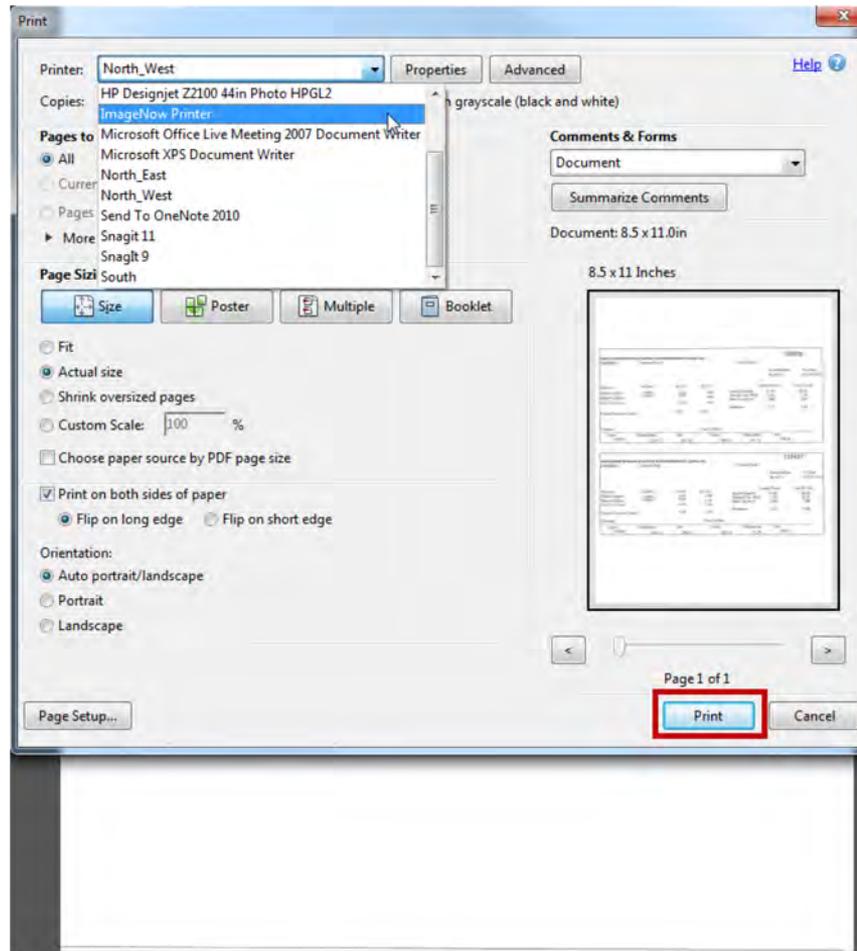
The ImageNow Print box will appear. Select IN Printer-Case from the Capture Profile drop-down. Then click on 'Ok'.

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

The Proposed Keys window will appear.
You will validate the Case Number and Case Name from the KEES Case Summary page.

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

The ImageNow Viewer window will appear with your attachment showing.

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

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

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

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

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

The Image [...] at KEES pag [...] he ImageNow [...]

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

STEP 2. ImageNow Toolbar will be displayed.
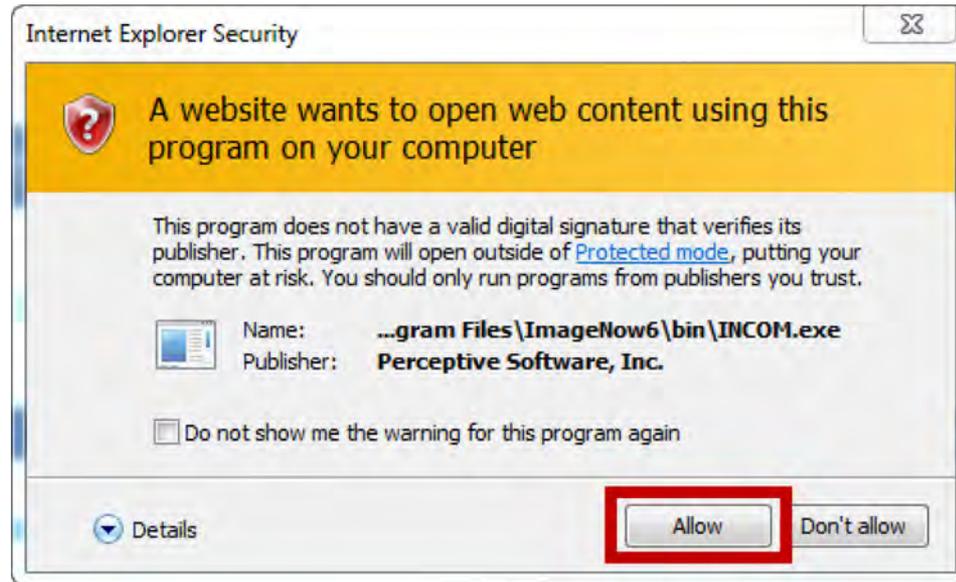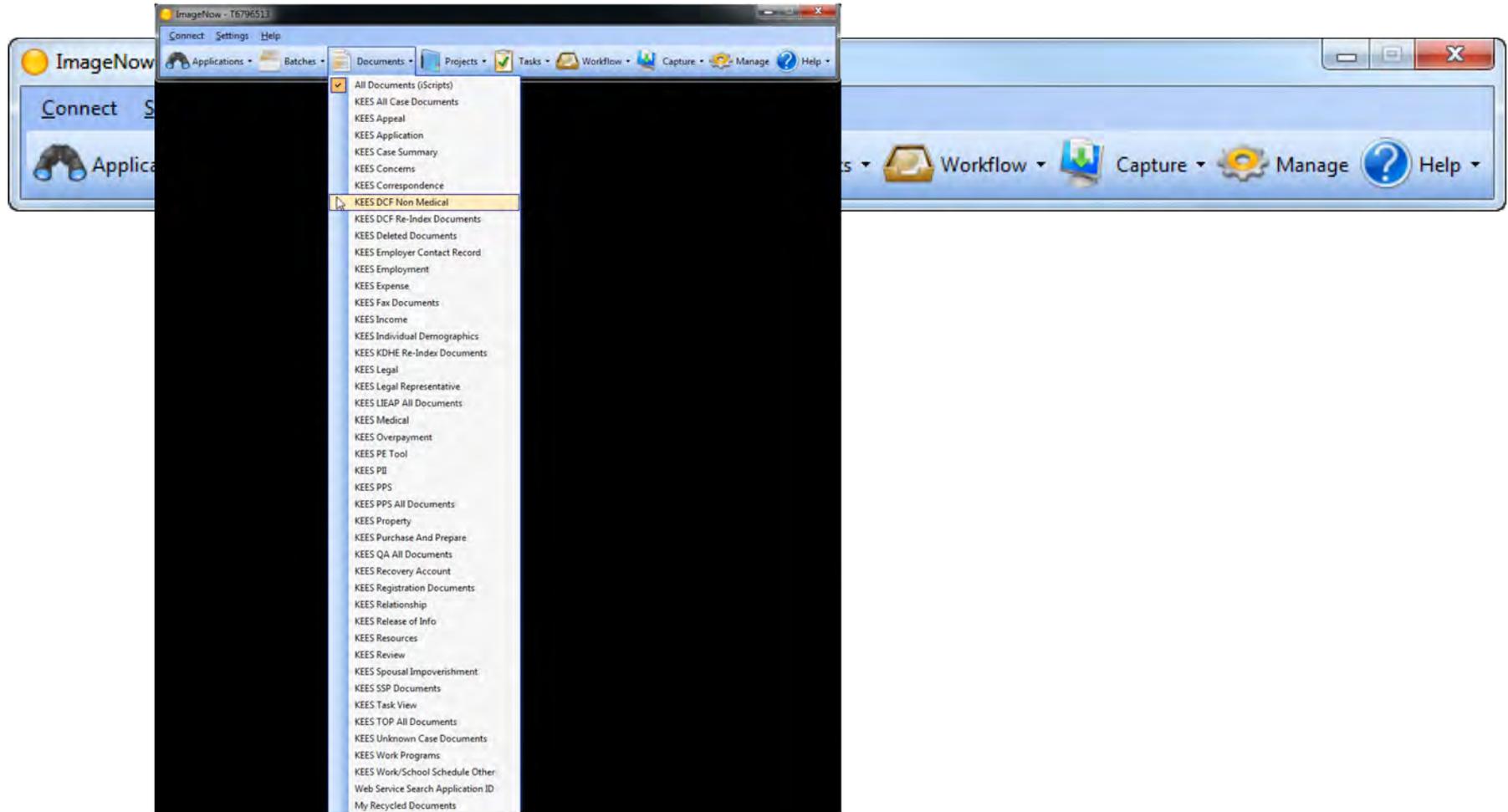
Imaging: DCF

Lesson 5: Document Management > Retrieval in ImageNow

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.
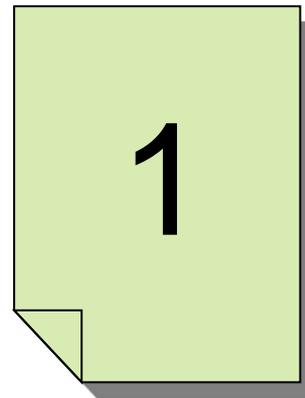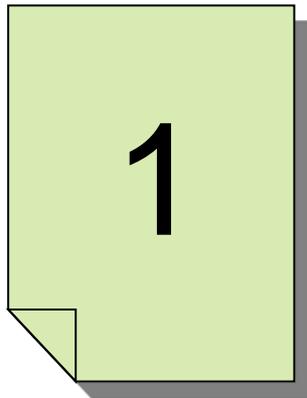
A docume[...]ns to a
Non-Med[...]e original
document[...]

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.

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.
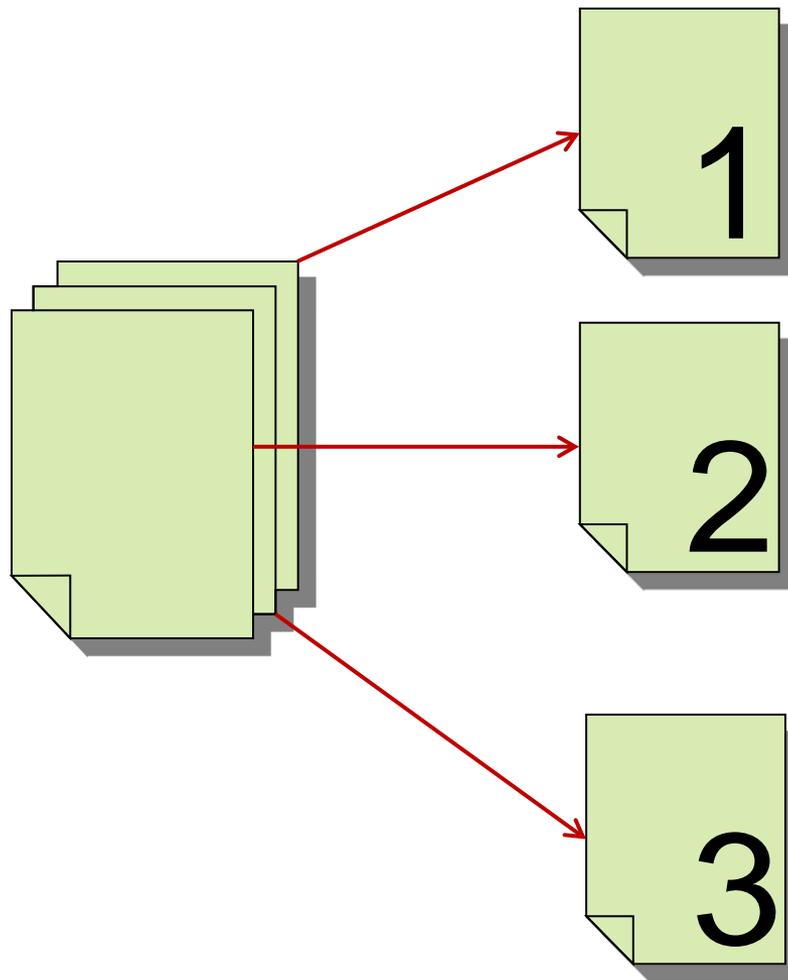
Lesson 5: Document Management > Document Split

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.

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

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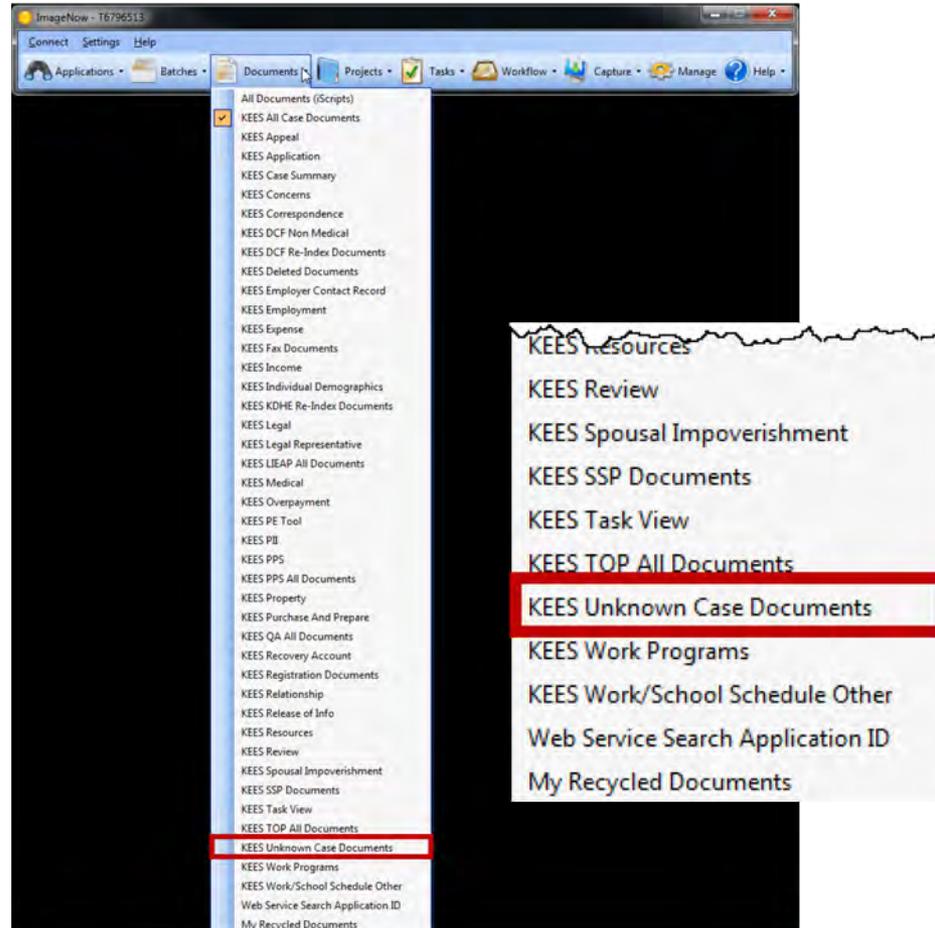
Step 4. Use the Quick Search parameters to retrieve desired document to re-index.

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

Step 8. Update the values in the appropriate eForm fields. Click the Submit button.
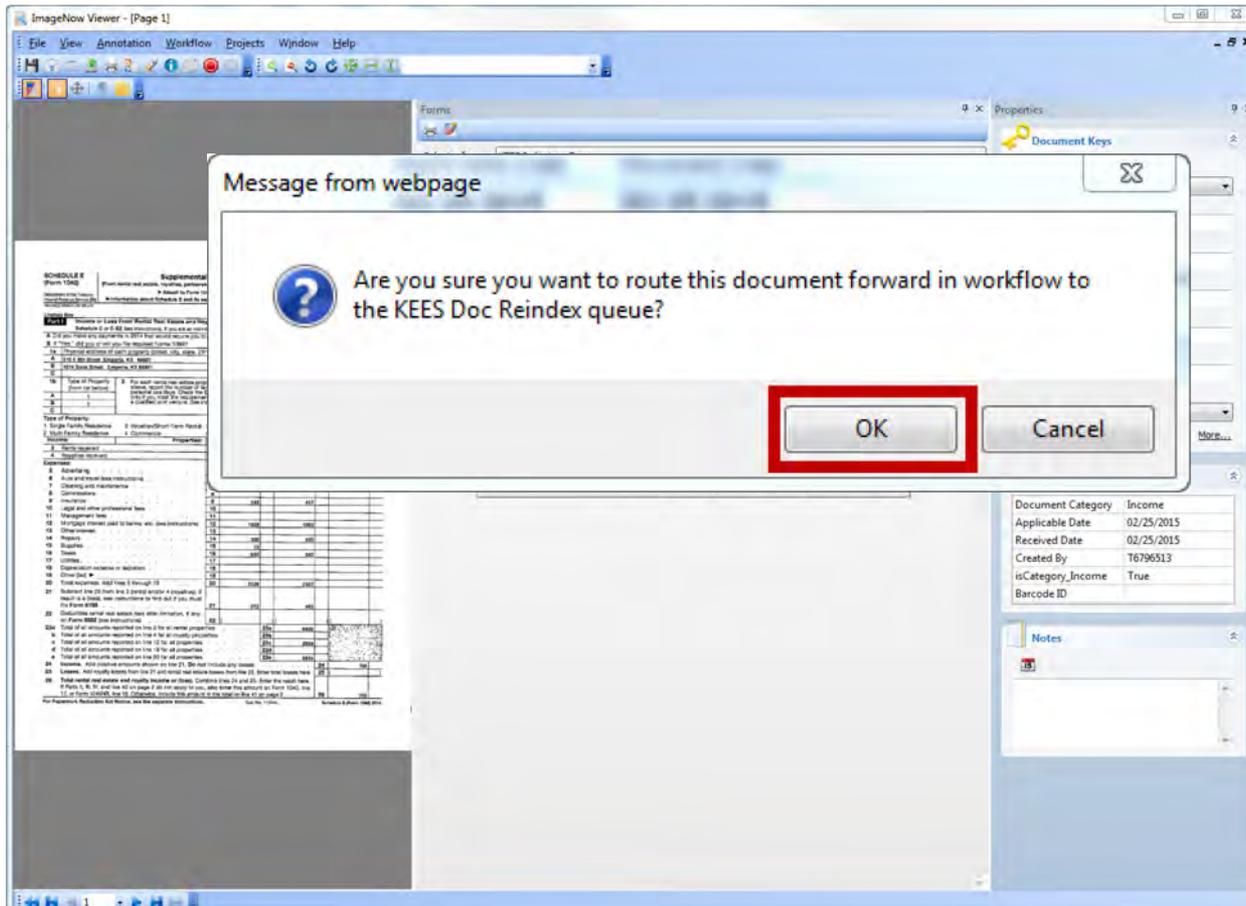
Initially all documents are associated to a case. For personal identifying information (PII) do second level indexing to the individual using Indexing eForm.

Case Indexing

Person Indexing
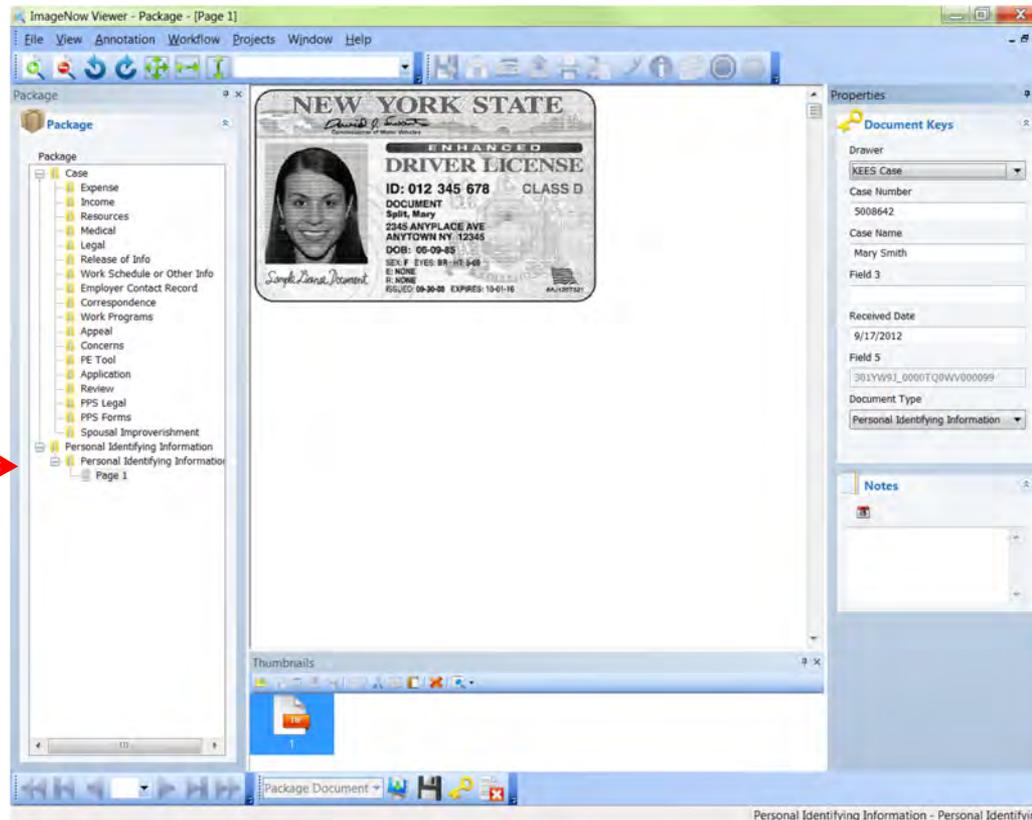
Case Level Indexing:
Case Documents will be Indexed to the Case Number, Case Name and Document Type.
Example: 1234, Jane Doe/Income

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

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

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.

2nd Level Person Indexing is required for documents containing Personal Identification. These documents are applicable to multiple cases and deemed "durable and portable."

To complete 2nd 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.
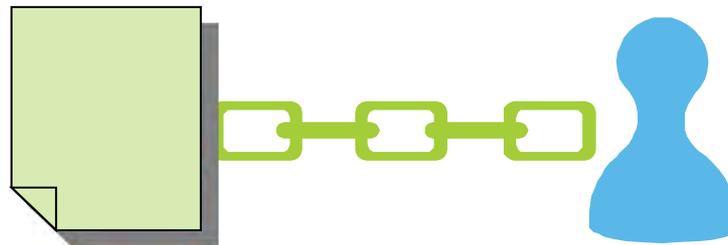
Imaging: DCF

Lesson 5: Document Management > 2nd Level Indexing

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

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

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

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

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"*

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.
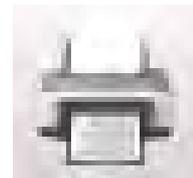
In Lesson 5, workers learned:

- 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**

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.
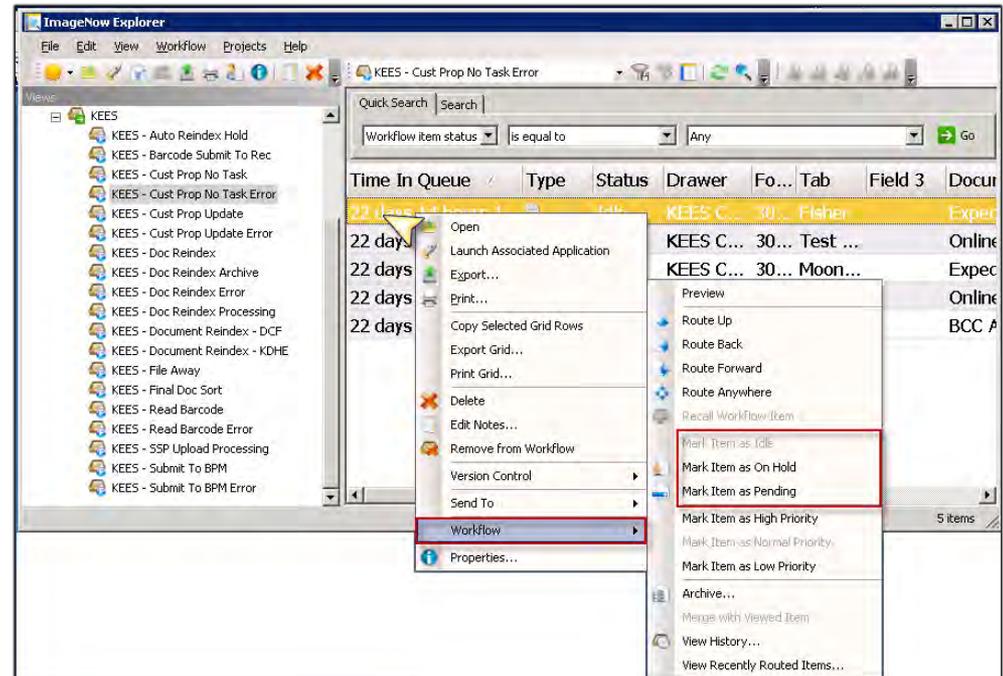
Issue 2: ImageNow Cannot Find The KEES Screen

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

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