

KEES Guide for Support Staff ImageNow

1.14.14

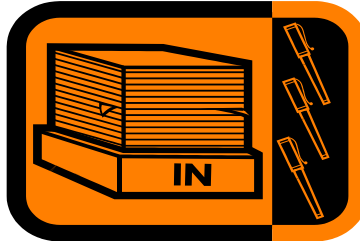
1

Table of Contents

Document Intake <ul style="list-style-type: none"> • Points of Entry • Registration • Hot & Cold Baskets 	Page 3 Non-Lobby Process Lobby Process
ImageNow Fundamentals <ul style="list-style-type: none"> • Launch & Login • Basic Steps • Capture Profile 	Page 12 Application Plans Package Baskets Indexing
Applications <ul style="list-style-type: none"> • Complete List • Medical • Basics 	Page 21 Big 4 Screening Clearinghouse Document Types DCF Document Types
Examples <ul style="list-style-type: none"> • Example 1: Medical Lobby Process • Example 2: Medical Non-Lobby Process • Example 3: Non-Medical Lobby Process 	Page 28 Example 4: Non-Lobby Loose Mail Example 5: Non-Medical Review, Non-Lobby Example 6: Interim Report
Unsigned Documents	Page 72
Unknown Documents	Page 73
Document Search	Page 74

2

Document Intake



3

Document Intake: Points of Entry

2 points of entry

Lobby

- Documents or applications that are received in the office where the consumer stays and meets with an EES Worker.

Non-Lobby

- Documents that are mailed to or received in the office where a consumer does not see an EES Worker.

4

Document Intake: Registration

NEW PROCESS: *Registration will occur prior to imaging.*

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

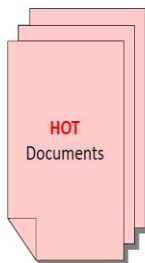


5

Document Intake: Hot/Cold Baskets

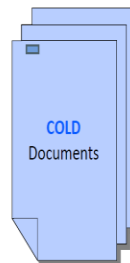
NO CHANGE: *Documents will be placed in applicable imaging basket.*

(Clearinghouse applications; returned mail; loose mail and registered DCF applications, reviews & IRs)



What is HOT?

- Unworked or unprocessed document(s) received
- 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, it is prioritized as **HOT**
- All documents to be routed to the Clearinghouse
- All documents received via non-lobby



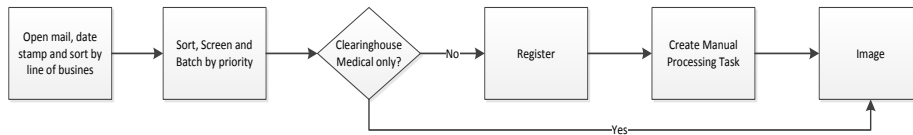
What is COLD?

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

If documents are prioritized as hot for one agency on combination applications, they are prioritized as hot for both.

6

Document Intake: Non-Lobby Process



See next slide for detailed step by step process.

7

Document Intake: Non-Lobby Process

- ✓ Open mail, date stamp front of each page and sort by line of business (VR, PPS, APS, CSS, Legal, Operations, LIEAP, Admin & EES).
- EES documents:**
- ✓ Apply screening criteria and sort according to DCF Applications, Clearinghouse Applications, Expedited Food Assistance Applications, Interim Reports, Non-Medical Reviews, Returned Mail, and Loose Mail.
 - If a Medical and Non-Medical Application is turned in with 1 set of supporting documentation, make a copy of the documentation so each application has a set of documentation.
 - Clearinghouse Application: Write Expedited PW, Potential CH Application, Urgent Need, or Unsigned Application on document if applicable. For example, the batch of Clearinghouse Applications will most likely be a mixture of document types used to route work to the Clearinghouse. The imager will need to know the criteria listed above. Sort and batch Clearinghouse Applications by document type if supported by volume of mail.
- ✓ Batch in groups of 25 (if applicable) with completed Non-Lobby Tracking Sheet
 - Deliver batches to correct location:
 - Clearinghouse Applications, Returned Mail and Loose Mail to Hot Imaging Basket.
 - DCF Applications, Reviews and Interim Reports with submitted supporting documents to Registration Basket. *****NEW*****
 - Cold documents to Cold Imaging Basket.
 - Unsigned documents returned to consumer per policy.
- ✓ After documents are registered, registration Support Staff writes Case Head and Case # on documents and creates a manual processing task and places document batch in the Hot Imaging Basket.
- ✓ All imaged documents are placed in the 60 day retention area.

8

Document Intake: Non-Lobby Process

NON-LOBBY IMAGING TRACKING SHEET – PACKAGE MODE

BATCH IN 25 ACCORDING TO:

Screened Yes for EXPEDITED FOOD ASSISTANCE

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

IR *Image using "DCS DCF Non-Medical" application plan

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

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

REVIEW *Image using "DCS Case" application plan

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

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

RECEIVED DATE:

SCANNED DATE:

PROCESSED BY:

The Non-Lobby Imaging Tracking Sheet

- assists with sorting Non-Lobby documents
- identifies the ImageNow application plan and document type

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

Received Date must match date stamp.

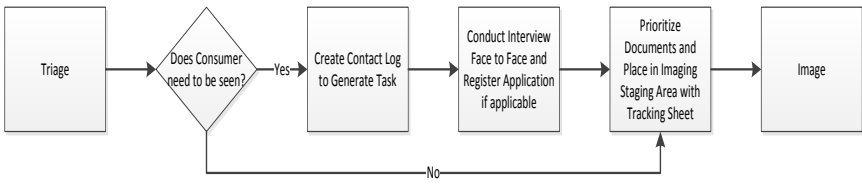
Attach tracking sheet to the documents and place in applicable basket. Maximum of 25 documents per tracking sheet.

Registration staff will return Imaging Tracking Sheet to document batch and place batch in Hot Imaging Basket. In some offices, registration staff will complete the process by imaging the documents at that time.

Imager enters Scanned Date and Processed By.

Tracking Sheet is not imaged.

Document Intake: Lobby Process



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

Document Intake: Lobby Process

03-08-2014

LOBBY IMAGING TRACKING SHEET – PACKAGE MODE

KAECSES Case Head: <input style="width: 50px;" type="text"/> Case #: <input style="width: 50px;" type="text"/>	KEES Case Head: <input style="width: 50px;" type="text"/> Case #: <input style="width: 50px;" type="text"/>	KSCares Case Head: <input style="width: 50px;" type="text"/> Case #: <input style="width: 50px;" type="text"/>
PRIORITY: <input type="checkbox"/> HOT <input type="checkbox"/> COLD	AGENCY: **Image medical before non-medical** <input type="checkbox"/> DCF <input type="checkbox"/> DCF Non-Medical <input type="checkbox"/> KEES Case <input checked="" type="checkbox"/> Clearinghouse <input type="checkbox"/> KEES New Application	
DCF Document Types: <input type="checkbox"/> Application <input type="checkbox"/> IR <input type="checkbox"/> Non-Medical Review <input type="checkbox"/> Review <i>*Medical*</i> <input type="checkbox"/> Loose Mail *refer to appropriate document type	Clearinghouse Document Types: <input type="checkbox"/> Expedited PW KanCare Application <input type="checkbox"/> KanCare Application <input type="checkbox"/> Potential CH Application <i>*route back to dcf*</i> <input type="checkbox"/> Unsigned CH Application <input type="checkbox"/> Urgent Need KanCare Application <input type="checkbox"/> 3100/3100.1 EXP PW Application <input type="checkbox"/> 3100/3100.1 Medical Application <input type="checkbox"/> 3100/3100.1 Urgent Medical Application	
RECEIVED DATE: <input style="width: 50px;" type="text"/> SCANNED DATE: <input style="width: 50px;" type="text"/> PROCESSED BY: <input style="width: 50px;" type="text"/> QUANTITY: <input style="width: 50px;" type="text"/>		

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. Tracking sheet will not be imaged.

ImageNow Fundamentals



ImageNow Fundamentals: Launch/Login

Launch ImageNow




Log In to ImageNow

- > KEES Username
- > Password



All documents will need to be scanned using ImageNow

ImageNow is accessed through the  icon on your computer

See Imaging: Application Components Job Aid

13

ImageNow Fundamentals: Basic Steps

All ImageNow functions have the same basic steps:

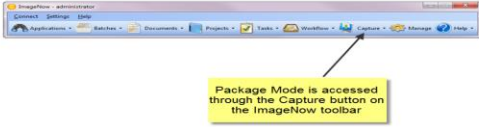
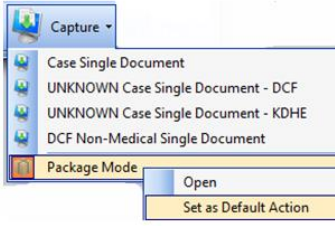
1. Launch ImageNow & log in.
2. Set Capture Profile
3. Set Application Plan
4. Prepare documents to be loaded into scanner
 - No staples, paperclips, or other foreign objects
 - All pages are right-side up and oriented the same. Performing this simple step before scanning the documents will save time within the application.
5. Capture document to the correct package basket and document type.
6. Indexing/re-indexing: Applying values to each document to easily retrieve documents after the point of capture (ex. Document Type, Case Number, Case Name, and Received Date) and for personal identifying information completing second level indexing to the individual.
 - Automatic Indexing: The KEES Case Summary screen will facilitate the action of "Indexing" through ImageNow, if the KEES case is known. Automatically populated information will be loaded via Capture Profile screen (ex. Package mode) per Application Plan selected.
 - Manual: Manual indexing will be available for documents that are not pertaining to Medical applications. Manual Indexing will require specific fields to be populated, ie. Case # and Case Name.
7. Quality Assurance: Visually confirm the captured image(s) are of good quality, all documents are captured and indexed to the correct case number, document type, etc.
8. Save/submit document to finalize imaging.
9. Setting applicable Manual Tasks.
10. Document storage – 60 day retention area

14

ImageNow Fundamentals: Capture Profile

Locate the **Capture Button** on the ImageNow Toolbar. Set **Package Mode** as the default action. DCF will always use Package Mode when capturing physical documents.

ImageNow Toolbar

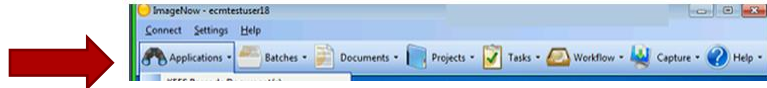



The following steps will set the default Capture mode:

- Step 1. Click the **Capture** drop-down arrow
- Step 2. Right click on the **Package Mode**
- Step 3. Select **Set as Default Action**

15

ImageNow Fundamentals: Application Plans



On the ImageNow Toolbar, navigate to the Applications drop down menu and select the desired Application Plan default.

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

Multiple Application Plans are listed in the ImageNow Practice Environment; however, when using ImageNow production environment you will see significantly fewer options.

16

ImageNow Fundamentals: Application Plans

Application Plans:

1. **KEES Barcode Document:** Use for any document with a KEES Generated Barcode, ie. Medical Review, IR, etc.
2. **KEES Case:** Use for any document tied to a DCF medical program and the KEES case number is known, ie registered DCF medical apps, DCF medical reviews (P3), medical loose mail.
3. **KEES Case LIEAP:** Not used in Phase 2
4. **KEES Case PPS:** Use for any document related to a PPS medical program and the case number is known.
5. **KEES DCF Non-Medical:** Use for any document tied to a non-medical program and the case number known, ie. registered non-medical apps, non-medical reviews, non-medical loose mail, IRs.
6. **KEES Delete Document:** Documents deleted from a KEES document drawer will be re-indexed to this application plan.
7. **KEES New Application:** Always use when routing an application to the Clearinghouse.
8. **KEES Unknown Case – DCF:** Use when a document is received at a DCF Office and cannot be tied to a person and or case number.
9. **KEES Unknown Case – KDHE:** N/A to DCF

17

ImageNow Fundamentals: Package Baskets

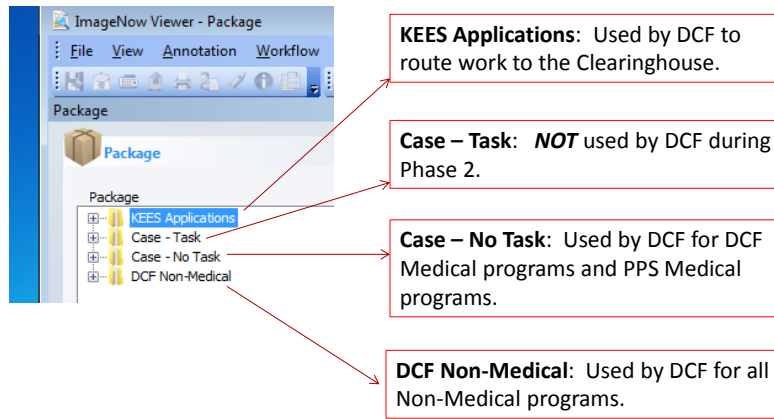
ImageNow Package Baskets:

1. **KEES Applications:** Used by DCF to route work to the Clearinghouse. All tasks will be automatically generated by the image with a due date, task name and assigned queue. See DCF Task Job Aid for Document Type definitions and examples.
2. **Case – Task: Will *not* be used by DCF** during Phase 2.
3. **Case – No Task:** Used by DCF for DCF Medical programs and PPS Medical programs. A manually generated 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. See DCF Task Job Aid for Document Type definitions and examples.
4. **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. See DCF Task Job Aid for Document Type definitions and examples.

Reference: Imaging – Scanning and DCF Tasks Job Aids

18

ImageNow Fundamentals: Package Baskets



Reference: Imaging – Scanning and DCF Tasks Job Aids

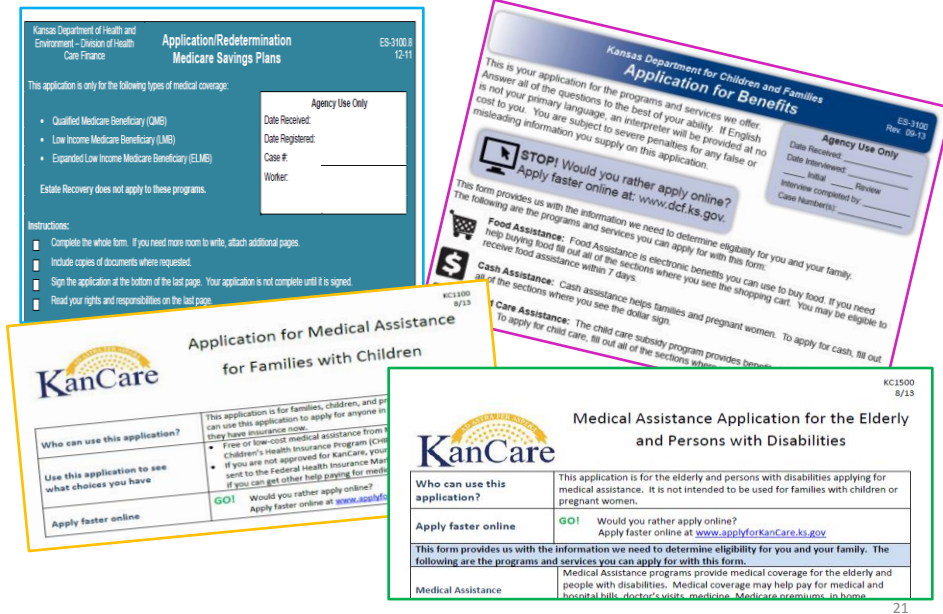
19

ImageNow Fundamentals: Indexing

- If applications, reviews or IRs have supplemental documents attached, such as paystubs, ID, resources, etc. **Support Staff will index the supplemental documents 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.
- **When routing applications to the Clearinghouse, DCF staff are not expected to index supporting documents to specific document types.**
- **Personal Identifying Information, ie. Birth Cert., Driver's License, etc. 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. This feature is not available on non-medical cases as ImageNow cannot access household information from KAECSSES or KsCares. Non-Medical personal identifying information will remain as the Personal Identifying Information document type. This feature will be available when all programs are in KEES.

20

Applications



Applications: Complete List

The following is a complete list of medical application forms:

- KC1100 – Medical assistance application for Families with Children
- KC1500 – Medical assistance application for the Elderly and Persons with Disabilities
- ES-3100.8 – Medicare Savings Program application
- ES-3100.7 – Medical assistance application for Breast and Cervical Cancer
- Applications for TB Medical
- Online applications received through the KanCare Customer Self-Service Portal
- MIPPA applications received through the SSA
- Applications originating at the Federally Facilitated Marketplace (effective 10/1/2013)

With the creation of medical-only application forms, two supplemental forms were also created:

- KC1105: E&D Supplement to the KC1100
- KC1505: Family Supplement to the KC1500

These supplements are used when the applicant has completed the wrong form, and more information is needed to determine the type of medical program that is needed. These forms are not applications and therefore are not readily available to the public.


DCF applications previously used for medical assistance requests have been renamed and reissued.

When the ES-3100 or ES3100.1 is received by DCF, the applications will be imaged.

- ES-3100 - Application for Families (FA, Cash & Child Care): Medical has been removed from this application.
- ES-3100.1 – Application for the Elderly and Persons with Disabilities – This application is obsolete. Human service programs available on this form are included on the ES-3100.

Applications: Medical

The three primary **medical** applications are listed below. Each of these applications is available in English and Spanish.



KC1100	• Families with Children
KC1500	• Elderly and Disabled Persons
ES-3100.8	• Medicare Savings Program

23

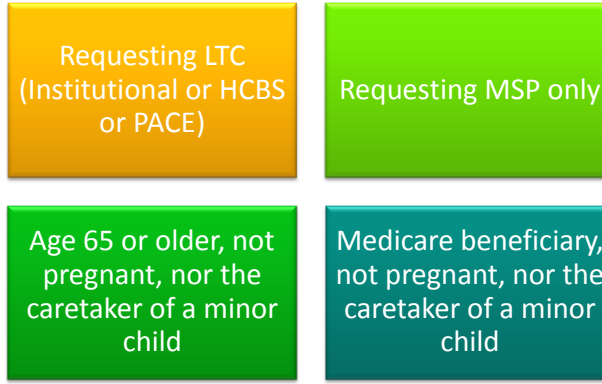
Applications: Basics

- Applications may be received as either a lobby or non-lobby application. Individuals accepting applications at DCF will need to screen the medical applications based on the Big 4 criteria to determine whether an application remains at DCF or is imaged to the Clearinghouse. Non-Medical applications will need to be screened for expedited services.
- Remember to date stamp all documents received by DCF.
- Remember all originals (except applications) are to be copied and the originals given back to the consumer. The document is then prepared for registration or imaging.
- Clearinghouse applications will be placed in the **HOT** basket for imaging, routed to the Clearinghouse through the imaging process and registered by the Clearinghouse.
- All DCF applications will be registered before being imaged. Registration staff will write the Case Head and Case # on the application. After being registered, they will be imaged as **HOT**.
- Always register a non-medical application first. Then register the medical application.
- Always search for a KAECSSES Client ID before registering a KEES case. The KAECSSES Client ID (10 digits) will be entered in the alternate ID field on the KEES Registration Person Detail Page.
- Always image documents to the KEES case (medical) first. Then image the non-medical documents. Use the Copy Function when possible to save time.
- It is important to understand the difference between a MAGI application (CH), a Big 4 application (DCF), hot basket, cold basket and the proper procedure for processing and imaging applications.

24

Applications: Big 4 Screening

Applying is the key word in this concept.



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.

25

Application: Clearinghouse Document Types

Document Types listed in the **KEES Applications** package basket will be **used by DCF to route work to the Clearinghouse**. Tasks will be automatically generated for the Clearinghouse by the image. No manual tasks are necessary. (See DCF Tasks Job Aid)

Document Type	Definition	Example
BCC Application	Application for Medical Coverage-Breast & Cervical Cancer	ES-3100.7
Expedited PW KanCare Application	Application/Supplement for Medical Program on a KanCare Application with a Pregnant Woman	KC1100, KC1500, KC1105, KC1505
Inmate Application	Application for Medical Assistance to cover inpatient hospital services for an inmate of a correctional facility	ES-3100.1a
KanCare Application	Application/Supplement for Family or E&D Medical Programs on a KanCare Application	KC1100, KC1500, KC1105, KC1505
Potential CH Application	A Medical Application that needs screened for MAGI with the potential to be sent back to DCF for processing	KC1100, KC1500, KC1105, KC1505
TB Application	Application for Medical Assistance to cover cared based on a TB diagnosis	ES-3100.3
Unsigned CH Application	A Medical Application without a signature to be processed by the Clearinghouse	KC1100, KC1500, KC1105, KC1505
Urgent Need KanCare Application	Application/Supplement for Family or E&D Medical Programs on a KanCare Application and one or more applicants has been screened to have an Urgent Need	KC1100, KC1500, KC1105, KC1505
3100/3100.1 Exp PW Application	Application for Medical Programs on a 3100/3100.1 Application with a Pregnant Woman	ES-3100, ES-3100.1
3100/3100.1 Medical Application	Application for Family or E&D Medical Program on a 3100/3100.1	ES-3100, ES-3100.1
3100/3100.1 Urgent Medical Application	Application for Family or E&D Medical Programs on a 3100/3100.1 Application and one or more applicants has been screened to have an Urgent Need	ES-3100 ES-3100.1

26

Application: DCF Document Types

Case – No Task Application document type will be used by DCF for DCF Medical programs. Medical applications will be registered and have a KEES case number before a document is imaged.
(See DCF Tasks Job Aid)

Basket	Document Type	Definition	Example	Queue	Task	Due Date
Case-No Task	Application	Application for Medical Programs Processed by DCF	ES-3100 ES-3100.1 KC1100 KC1500 KC1105 KC1505	See DCF Tasks Job Aid Table 4.5		

DCF Non-Medical Application document type will be used by DCF for all Non-Medical programs. Non-Medical applications will be registered and have a KAECSES/KsCares case number before a document is imaged.
(See DCF Tasks Job Aid)

Basket	Document Type	Definition	Example	Queue	Task	Due Date
DCF Non-Medical	Application	Application for Non-Medical Programs Processed by DCF	ES-3100 ES-3100.1	See DCF Tasks Job Aid Table 4.5		

27

Examples



As you read through the following examples Sarah is the consumer, Linda is the Support Staff, Rebecca is the Red Team Worker, Julie is the Blue Team Worker and Grant is the Purple Team Worker.

28

Example 1: Medical Lobby Process

ROUTING AN APPLICATION TO THE CLEARINGHOUSE

29

Example 1: Medical Lobby Process

Sarah comes into a local DCF office. She is greeted by Linda. Linda triages the request for service and determines Sarah is turning in an application for Medical assistance and does not meet the “Big 4” criteria. Therefore, the Medical application will be routed to the Clearinghouse. Linda informs Sarah her application will be sent to the Clearinghouse for processing and gives Sarah a KanCare card. The application is prioritized as **hot** and routed to the Clearinghouse.

30

Example 1: Medical Lobby Process



The KanCare Card will be given to Medical Assistance applicants when it is determined based on the Big 4 screening process that the application will be transferred to the KanCare Clearinghouse. This process is only applicable when the consumer has come to a DCF lobby with their application not for applications received in the mail.

31

Example 1: Medical Lobby Process

NON-LOBBY IMAGING TRACKING SHEET – PACKAGE MODE

BATCH IN 25 ACCORDING TO:

Screened Yes for EXPEDITED FOOD ASSISTANCE

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

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

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

RECEIVED DATE:

SCANNED DATE:

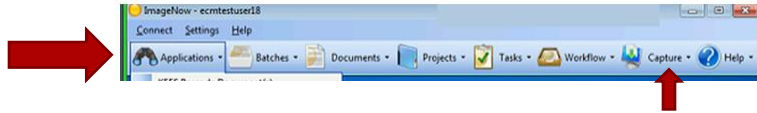
PROCESSED BY:

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

Place documents in the HOT basket.

32

Example 1: Medical Lobby Process



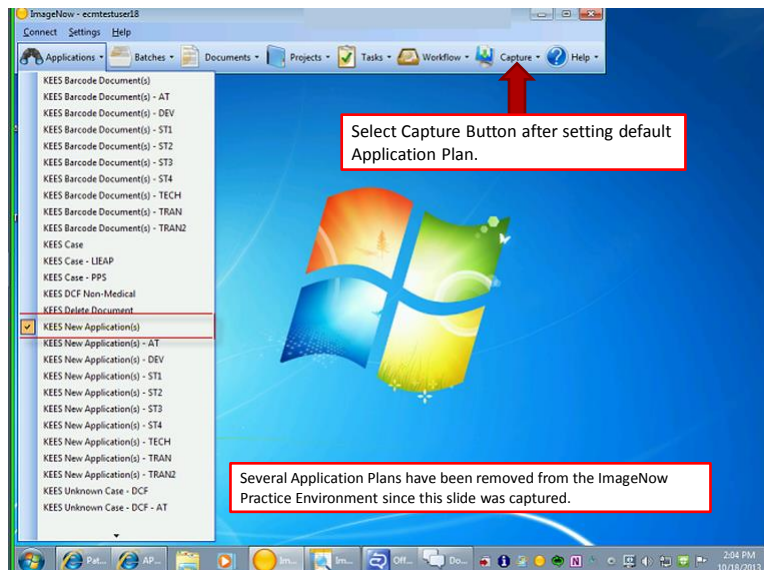
Check that Capture Profile is set to **Package**.

On the ImageNow Toolbar, navigate to the Applications drop down and Select **KEES New Application(s)** as the desired Application Plan default.

Always use the **KEES New Application(s)** application plan when *routing an application to the Clearinghouse*.

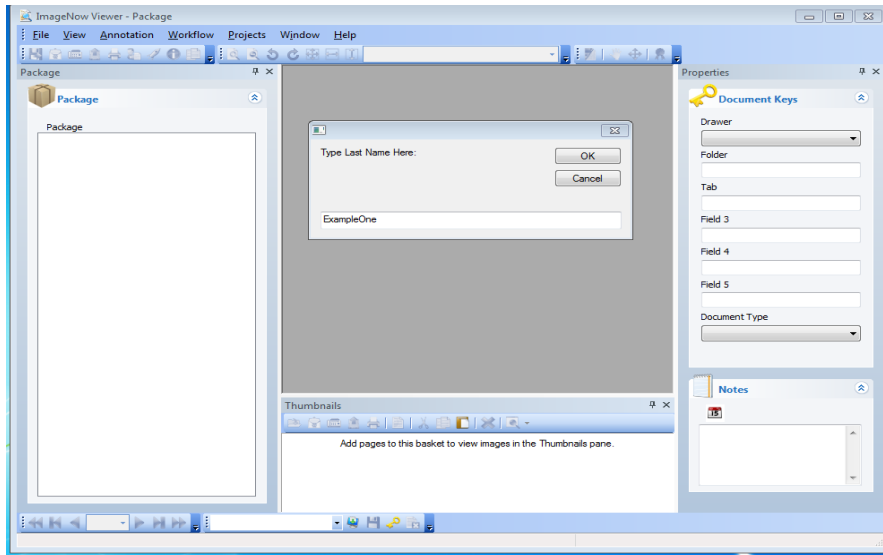
33

Example 1: Medical Lobby Process



34

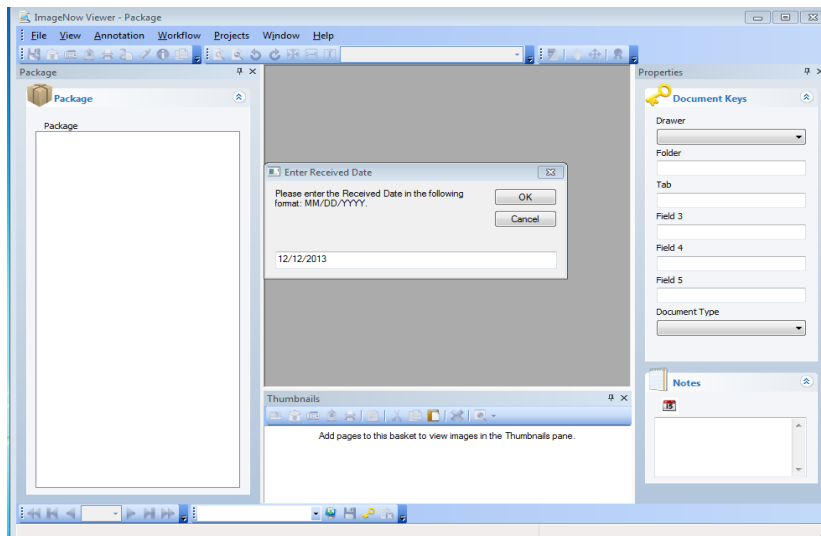
Example 1: Medical Lobby Process



Enter the applicant's last name, click "ok"

35

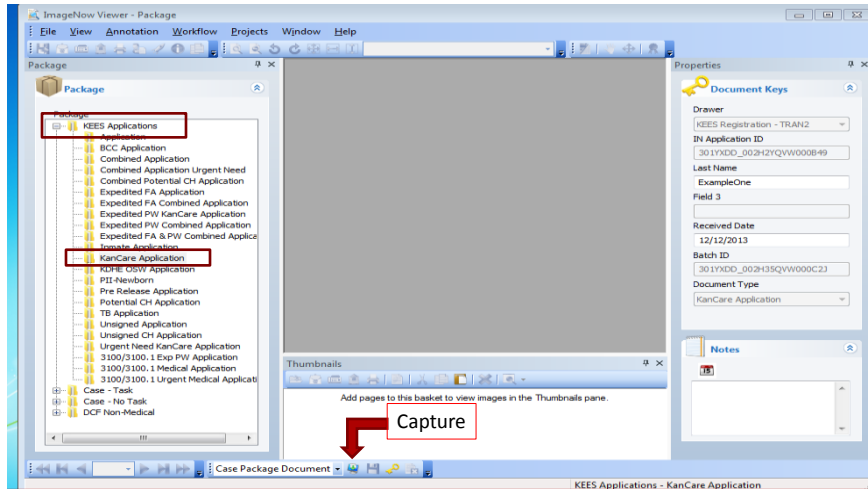
Example 1: Medical Lobby Process



Enter the correct received date (*must match the date stamp*), then OK.

36

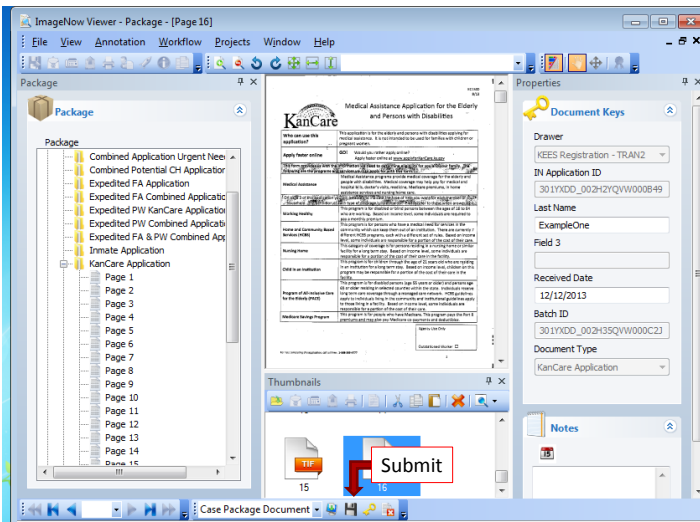
Example 1: Medical Lobby Process



Locate and select the correct Clearinghouse Document type in the **KEES Applications** basket, i.e. **KanCare Application** on the left hand side of the ImageNow Package Mode Screen.
 Note: KanCare Application is an example. The user will need to use different document types based on the Lobby Tracking Sheet. **Prepare documents** to be loaded into the scanner. Select **Capture** button.

37

Example 1: Medical Lobby Process



After submitting, the document will be indexed to the **KEES Registration Documents** drawer and a task will be created for the Clearinghouse to register the application.

- **Application is scanned** and the image of the application appears in the ImageNow Viewer.
- **Quality Assurance (QA)** should be used to visually confirm the captured image(s) are of good quality, all documents are captured and indexed to the correct case information.
- Example 1 scanned image will directly go into the **"KanCare Application"** document type. Select **Submit**.

38

Example 2: Medical Non-Lobby Process

APPLICATION MEETS ONE OF THE BIG 4 CRITERIA

39

Example 2: Medical Non-Lobby Process

Sarah mails in a Medical application to her local DCF office. Linda screens the application for the “Big 4” criteria. It is determined that Sarah meets the “Big 4” criteria and the application will be processed by DCF. Application is included with Non-Lobby Imaging Tracking Sheet batch for DCF Medical and placed in the Registration Basket. Linda registers the application in KEES, documents the KEES case # on the application and creates a manual task in KEES for the orange team. The application is prioritized as HOT. The 'KEES Case' Application Plan is used to index to the 'Application' doc type found under the 'Case - No Task' basket.

40

Example 2: Medical Non-Lobby Process

NON-LOBBY IMAGING TRACKING SHEET – PACKAGE MODE

BATCH IN 25 ACCORDING TO:

Screened Yes for EXPEDITED FOOD ASSISTANCE

Application Document Types	
<p>DCF Non-Medical: <input type="checkbox"/> Application</p> <p>DCF Medical: <input checked="" type="checkbox"/> Application</p> <p><input type="checkbox"/> IR <input type="checkbox"/> NON-MEDICAL REVIEW <input type="checkbox"/> RETURNED MAIL <input type="checkbox"/> REVIEW <input type="checkbox"/> UNSIGNED APPLICATION/REVIEW/IR <input type="checkbox"/> LOOSE MAIL</p>	<p>Cleaninghouse: <input type="checkbox"/> Expedited PW KanCare Application <input type="checkbox"/> KanCare Application <input type="checkbox"/> Potential CH Application *Route back to DCF <input type="checkbox"/> Unsigned CH Application <input type="checkbox"/> Urgent Need KanCare Application <input type="checkbox"/> 3100/3100.1 EXP PW Application <input type="checkbox"/> 3100/3100.1 Medical Application <input type="checkbox"/> 3100/3100.1 Urgent Medical Application</p>

RECEIVED DATE:

SCANNED DATE:

PROCESSED BY:

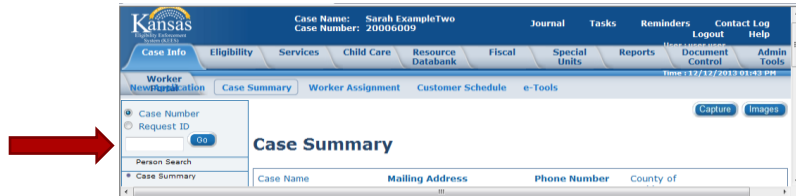
Place tracking sheet with application in the Registration location.

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.

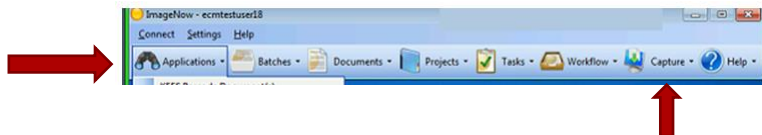
41

Example 2: Medical Non-Lobby Process

- Within KEES, locate the **Case Summary** using the KEES Case# assigned during registration.

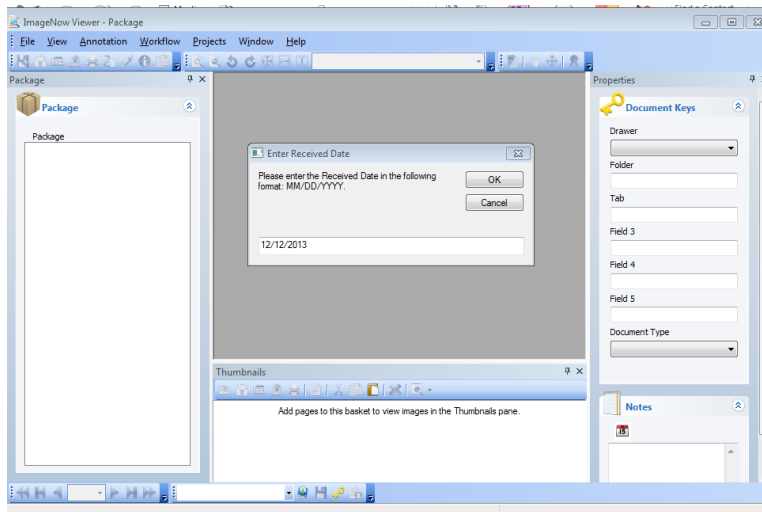


- On the ImageNow Toolbar, navigate to the **Applications** drop down and select **KEES Case** as the desired Application Plan default.
 Always use **KEES Case** application plan for any document tied to a DCF medical program when the KEES case number is known, ie registered DCF Medical app, DCF Medical reviews (P3), Medical loose mail.
- Select **Capture Button** after setting default Application Plan.



42

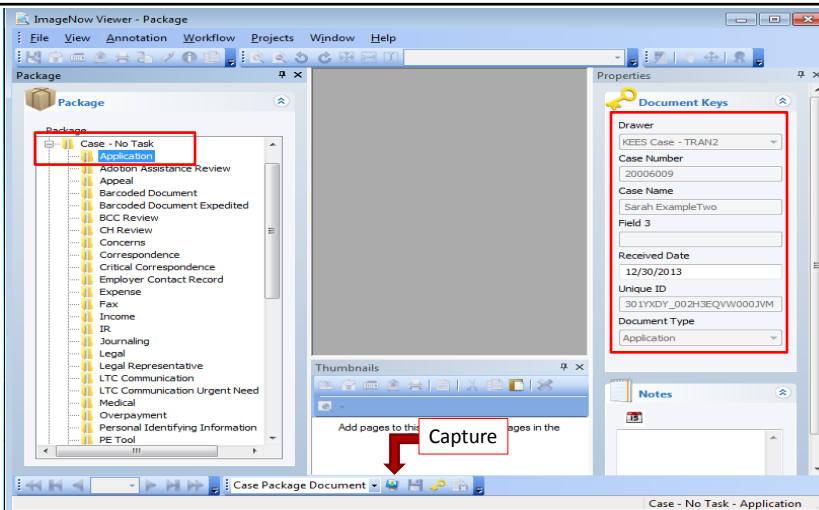
Example 2: Medical Non-Lobby Process



Enter Received Date - must match date stamp.

43

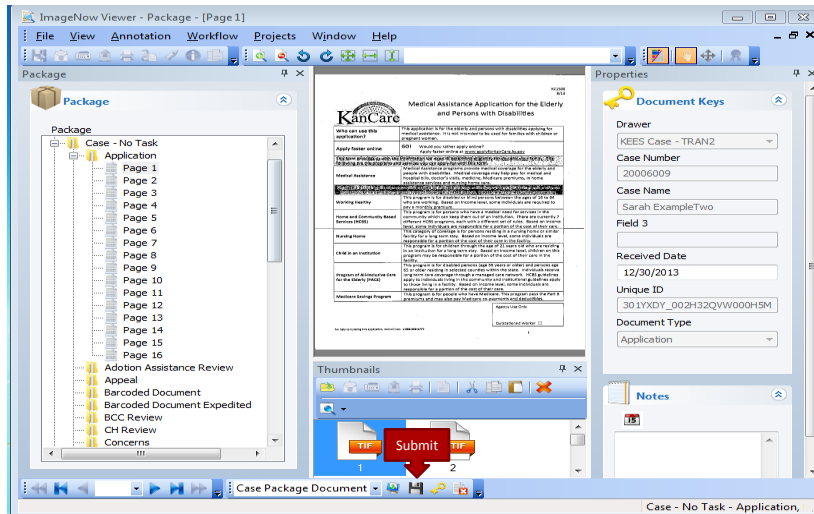
Example 2: Medical Non-Lobby Process



Select the **Case – No Task** drawer and **Application** document type. Verify that the **KEES Case#**, **Case Name** and **Received Date** are correct. ImageNow is accessing the information on the KEES Case Summary to complete the Case # and Case Name fields. **Prepare documents** to be loaded into the scanner. Select **Capture**.

44

Example 2: Medical Non-Lobby Process



- **Application is scanned** and the image of the application appears in the ImageNow Viewer.
- **Quality Assurance (QA)** should be used to visually confirm the captured image(s) are of good quality, all documents are captured and indexed to the correct case information.
- Example 2 scanned image will directly go into the **Application** document type. Select **Submit**.

45

Example 3: Non-Medical Lobby Process

NON-MEDICAL TANF APPLICATION

46

Example 3: Non-Medical Lobby Process

Sarah comes into a local DCF office. She is greeted by Linda. Linda triages the request for service and determines Sarah is turning in an application for TANF. Linda documents the contact on the Contact Log. She tells Sarah her approximate wait time and asks Sarah to be seated. Rebecca claims the task from the Task Inventory page and takes Sarah to an interview room. Rebecca registers and processes the application in KAECSSES. Sarah turned in some verifications used to process her TANF application however, Rebecca still needs additional information to complete a determination. Rebecca makes copies of these verifications on hand and informs Sarah of the information being requested. She completes a Lobby Imaging Tracking Sheet and places the verifications and application in the designated imaging area. The application and verifications will be prioritized as "hot" because a determination has not been made. Rebecca updates the task status reason to "Pending" in KEES.

Linda checks the hot basket and finds the Lobby Imaging Tracking sheet with Sarah's application and verifications attached. Linda images all documents to the KEES DCF Non-Medical application plan which is used for any document tied to a non-medical program and the case number is known (Rebecca registered Sarah's non-medical application during the interview).

47

Example 3: Non-Medical Lobby Process

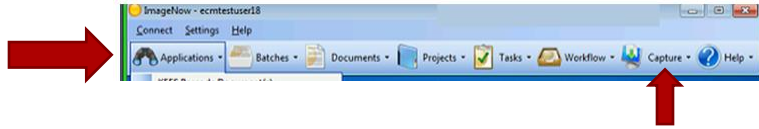
LOBBY IMAGING TRACKING SHEET – PACKAGE MODE 01-06-2014

KAECSSES Case Head: Sarah Training3 Case #: 01278845	KEES Case Head: <input type="text"/> Case #: <input type="text"/>	KSCares Case Head: <input type="text"/> Case #: <input type="text"/>
PRIORITY: <input checked="" type="checkbox"/> HOT <input type="checkbox"/> COLD	AGENCY: <small>**Image medical before non-medical**</small> <input type="checkbox"/> DCF <input checked="" type="checkbox"/> DCF Non-Medical <input type="checkbox"/> KEES Case <input type="checkbox"/> Clearinghouse <input type="checkbox"/> KEES New Application	
DCF Document Types: <input checked="" type="checkbox"/> Application <input type="checkbox"/> IR <input type="checkbox"/> Non-Medical Review <input type="checkbox"/> Review <small>*Medical*</small> <input type="checkbox"/> Loose Mail <small>*Order by appropriate document type*</small>	Clearinghouse Document Types: <input type="checkbox"/> Expedited PW KanCare Application <input type="checkbox"/> KanCare Application <input type="checkbox"/> Potential CH Application <small>*Route based to dcf*</small> <input type="checkbox"/> Unsigned CH Application <input type="checkbox"/> Urgent Need KanCare Application <input type="checkbox"/> 3100/3100.1 EXP PW Application <input type="checkbox"/> 3100/3100.1 Medical Application <input type="checkbox"/> 3100/3100.1 Urgent Medical Application	
RECEIVED DATE: <input type="text"/> SCANNED DATE: <input type="text"/> PROCESSED BY: <input type="text"/> QUANTITY: <input type="text"/>		

Worker will complete the Lobby Imaging Tracking Sheet after completing the interview & will place documents in the imaging HOT basket.

48

Example 3: Non-Medical Lobby Process

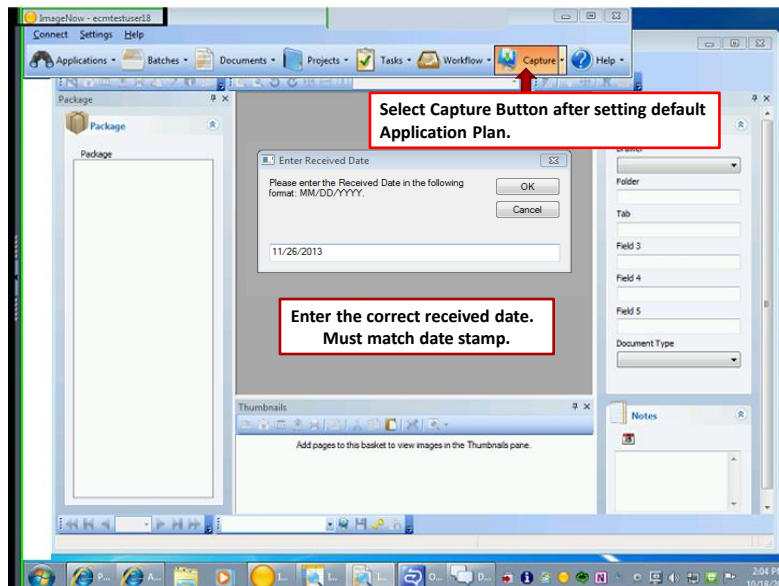


On the ImageNow Toolbar, verify the Capture Profile is **Package** then navigate to the Applications drop down and Select **KEES DCF Non-Medical** as the desired Application Plan default.

Always use **KEES DCF Non-Medical** for any document tied to a non-medical program and the case number is known, ie. registered non-medical apps, non-medical review, non-medical loose mail, IR.

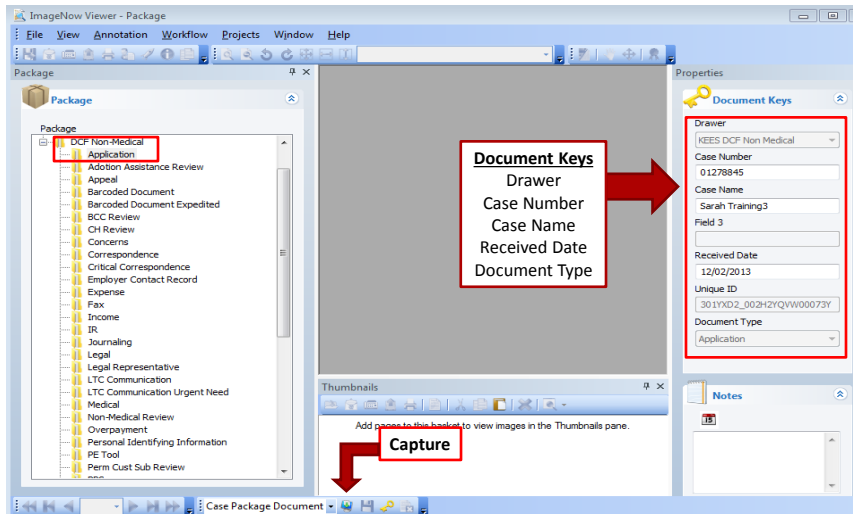
49

Example 3: Non-Medical Lobby Process



50

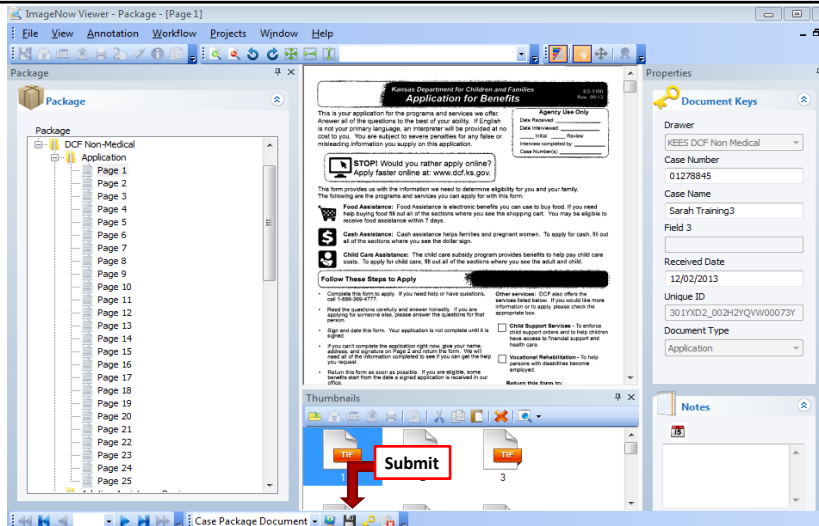
Example 3: Non-Medical Lobby Process



Select the correct **DCF Non-Medical** Document type of **Application**. Check Document Keys: verify drawer is **KEES DCF Non-Medical**, copy/paste **KAECSES Case #** from KAECSES, enter **Case Name** (First Name, Last Name) as it appears in KAECSES, verify **Received Date**. **Note: Application** is an example. The user will need to use different document types based on the Lobby Tracking Sheet. **Prepare documents** to be loaded into the scanner. Select "Capture" button.

51

Example 3: Non-Medical Lobby Process



Sarah's application also has supplemental documents attached (paystub and ID). Support Staff will index the supplemental documents to the appropriate document type within the DCF Non-Medical Drawer before submitting the image. Drag the paystub to the **Income** doc type and the ID to the **Personal Identifying Information** doc type. Click **Submit**. **NOTE: Person Level Indexing of ID is not available for non-medical Cases.**

52

Example 4: Non-Lobby Loose Mail

Medical & Non-Medical

53

Example 4: Non-Lobby Loose Mail

- Remember to keep all supporting documents with the application, review or IR for imaging. Do not separate.
- Keep each consumer's documents together for imaging.
- Research in KAECSES/KsCares & KEES for case information on all returned mail and loose mail documents prior to imaging. Case numbers should be documented on applications, reviews and IRs during the registration process.
- Image documents
 - use applicable ImageNow Application Plan: **KEES Case** or **KEES DCF Non-Medical** for loose mail.
 - index to appropriate package basket and document type
 - copy documents from medical to non-medical drawers as needed for DCF documents.
 - 2nd level or Person Level index Personal Identifying Information on Medical cases.
- Create manual task using the Manual Tasks process for appropriate team to process document.
- Original documents will be sent back to the consumer .
- File paper documents in 60 day retention area

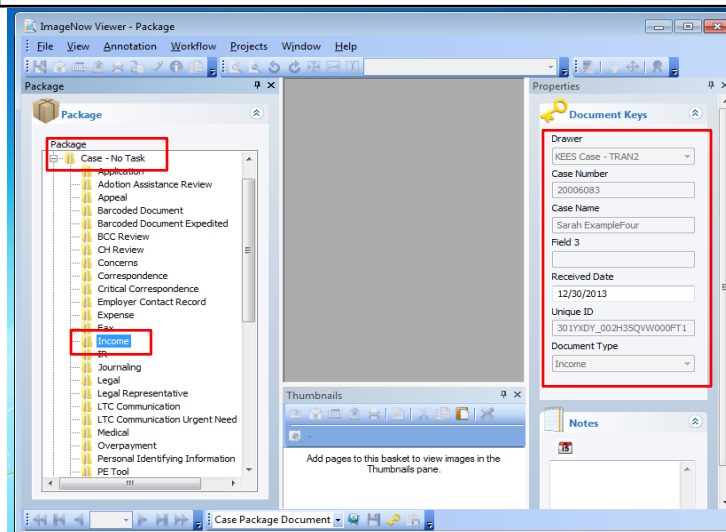
54

Example 4: Non-Lobby Loose Mail

Sarah mails in her Employment Verification Form and Driver's License for her Food Assistance and Medical case. Linda dates stamps documents, batches with Non-Lobby Imaging Tracking Sheet. Batch is taken from hot basket, KAECSSES and KEES are searched to identify which case and agency the verification belongs to. Linda verifies that the verifications are for DCF cases. The verification is imaged and indexed to the correct case number(s) and appropriate doc type. Linda creates a manual task for the Purple Team.

55

Example 4: Non-Lobby Loose Mail



Remember

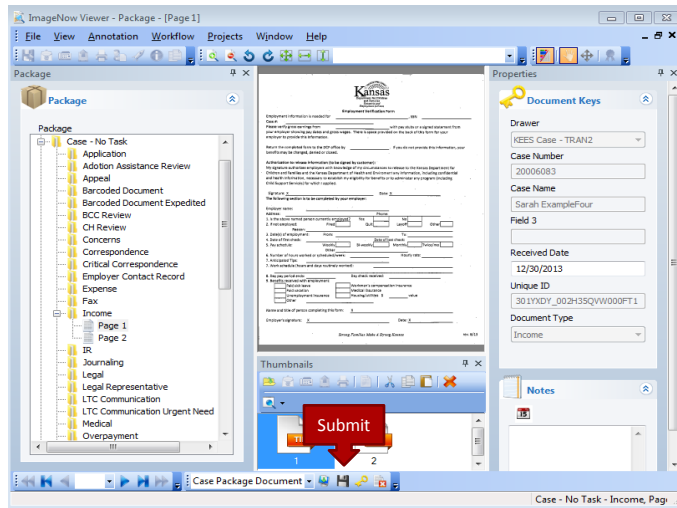
First search KEES for case information. ImageNow will auto populate **Case Number** and **Case Name** from KEES if you have the KEES Case Summary page open for the consumer. Also, search KAECSSES & KsCares to locate case numbers needed to copy documents to non-medical drawer.

Capture Profile: **Package**

Application Plan: **KEES Case**. Select **Capture**. Enter **Received Date**.

Package: **Case – No Task** and Document Type **Income** for Employment Verification Form
Select **Capture**

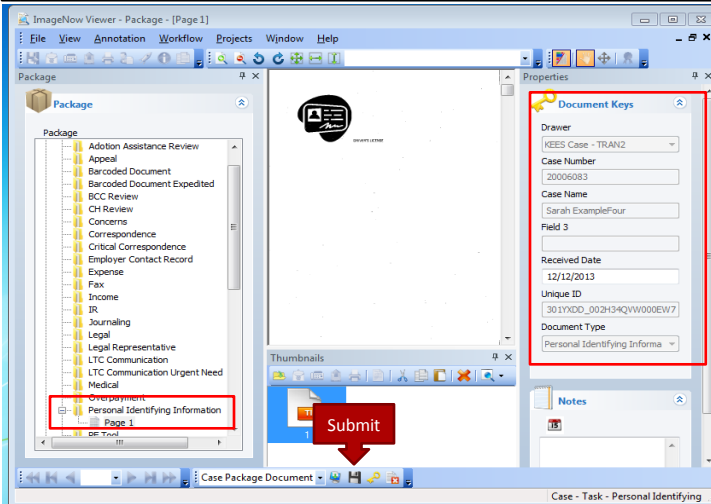
Example 4: Non-Lobby Loose Mail



QA images and indexing , then select **Submit**.

57

Example 4: Non-Lobby Loose Mail

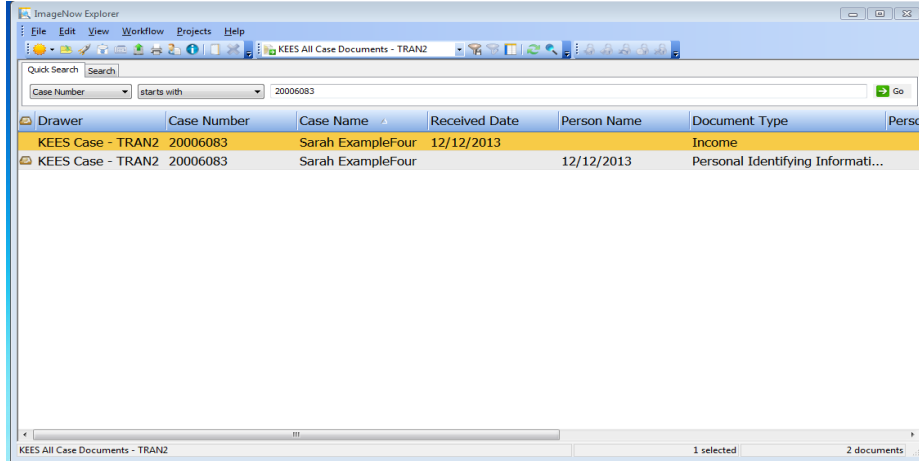


****To save time, both Documents could be imaged at the same time to the Income doc type. Then, drag Driver's License thumbnail to Personal identifying Information.**

Load copy of Driver's License in scanner. Capture Profile: Package Application Plan: KEES Case. Select Capture. Enter Received Date. Package: Case - No Task Document Type = Personal Identifying Information Select Capture, QA images then select Submit.

58

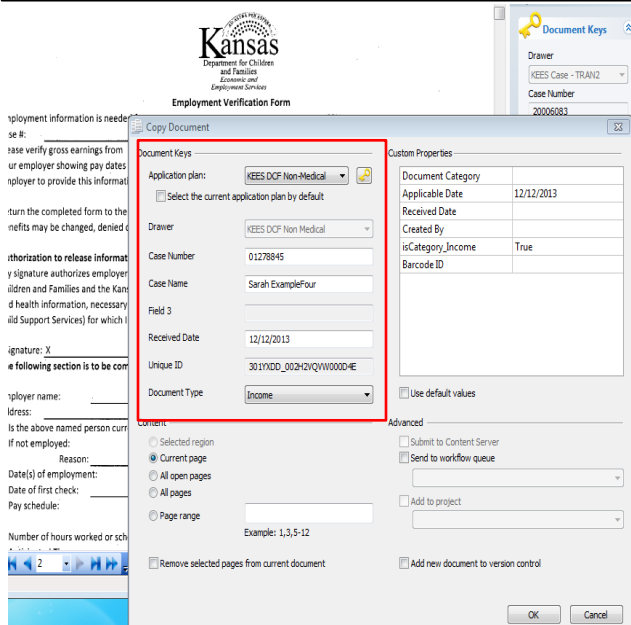
Example 4: Non-Lobby Loose Mail



Using ImageNow Document Search, KEES All Case Document document view, locate documents imaged to the KEES Case. Enter KEES case number, then GO. From ImageNow Explorer, open Income document type by double clicking on document.

59

Example 4: Non-Lobby Loose Mail



Copy document to Non-Medical drawer by using **File** on ImageNow Viewer, then **Copy document**.

Change Application Plan to **KEES DCF Non-Medical**. Enter Received Date.

Paste **KAECSSES case#** copied from system. **Verify Case Name**.

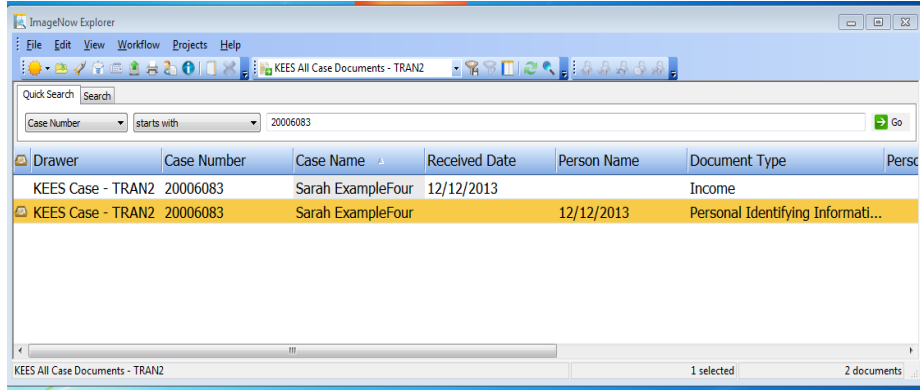
Verify appropriate **Document Type of Income**.

Select OK. Close ImageNow Viewer to return to ImageNow Explorer.

Employment Verification Form has been copied to Non-Medical income drawer.

60

Example 4: Non-Lobby Loose Mail

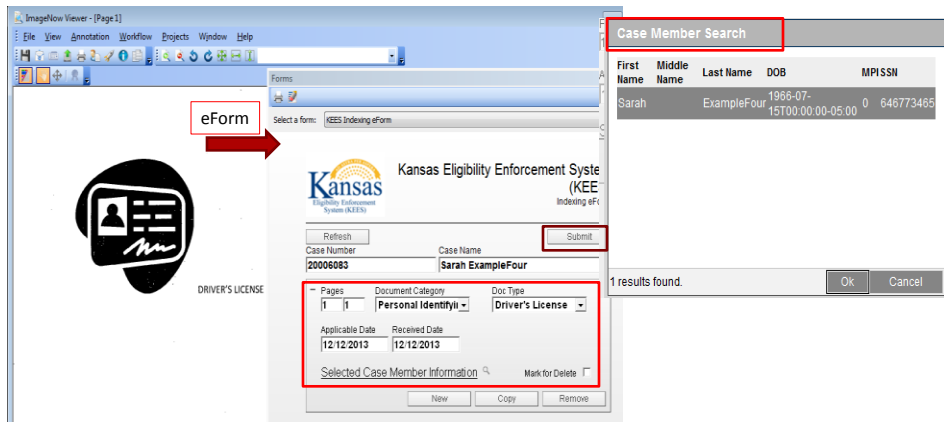


Return to the **ImageNow Explorer**. Locate the **Personal Identifying Information** document imaged to KEE Case. Open by double clicking on document. Repeat previous steps to **copy Driver's License to Non-Medical drawer**: Application Plan = **KEES DCF Non-Medical**; paste **KAECSES case#** copied from system; verify **case name**; select appropriate **Document Type of Personal Identifying Information**. **Select OK**. Driver's License will be copied to Non-Medical Personal Identifying Information drawer.

While still on **ImageNow Viewer with Driver's License** complete 2nd level Person indexing for Medical case, **F12**. **Personal Identifying Information can only be indexed to the "person level" on Medical Cases**. This feature is not available on Non-Medical cases. Non-Medical Personal Identifying Information will remain as the Personal Identifying Information document type. This feature will be available when all programs are in KEEES.

61

Example 4: Non-Lobby Loose Mail



On the **eForm**, select the **Doc Type of Driver's License** for the Personal Identifying information. Next to **Selected Case Member Information** select the magnifying glass to access the Medical **Case Member Search**. On the Case Member Search window, select the correct case member for the ID, then **OK**, then **Submit**. Close ImageNow Viewer. The Employment Verification form is now located in both the medical and non-medical income drawers and the Driver's License has been copied to the non-medical Personal Identifying Information drawer and Person Level indexed on the medical case. Final step is to **set manual tasks** for the purple team and **file the documents** in the 60 day retention area.

62

Example 5: Non-Medical Review, Non-Lobby

NON-MEDICAL REVIEW

63

Example 5: Non-Medical Review, Non-Lobby

Key Process Considerations:

- Non-Lobby Review: Reviews will be attached to the applicable Non-Lobby Imaging Tracking sheet and placed in the Registration location. All reviews will be registered then imaged as HOT.
- Imaging Document Types:

Medical Reviews =	Reviews
Non-Medical Reviews =	Non-Medical Reviews.
- Tasks will be manually generated for the Blue Team. Complete the 'Review Due' field when creating a manual application processing task for the Blue queue. This will ensure reviews can be prioritized according to 'Review Due' date in the Blue queue.

64

Example 5: Non-Medical Review, Non-Lobby

Sarah mails in her Food Assistance review. Review is sorted and bundled with Non-Lobby Imaging Tracking Sheet and placed in the Registration location. Linda registers the review in KAECSES and creates a manual task in KEES for the blue team. She images the review and any supporting documents as hot to the appropriate Non-Medical Review document type and indexes any supporting documents. Julie claims the task, cold calls Sarah, makes collateral contacts, and processes the review in KAECSES. Julie updates the task status reason to complete in KEES.

65

Example 5: Non-Medical Review, Non-Lobby

- Locate **Non-Medical Case** in KAECSES. Copy case#. Be sure the review is registered.
- Set ImageNow Capture Mode to **Package**.
- Set ImageNow Application Plan to **KEES DCF Non-Medical**.
- Select **Capture**
- Enter **Received Date**

66

Example 5: Non-Medical Review, Non-Lobby

Document Keys:

- Drawer = **KEES DCF Non-Medical**
- Copy and paste **KAECSES Case#** to the Case Number field.
- Enter **Case Name** in Case Name field as it appears in KAECSES.
- Verify **Received Date**.

Package:

- Select **DCF Non-Medical**
- Within **DCF Non-Medical**, select **Non-Medical Review** document type.
- Index the paystub to **Income** doc Type and the bank statement to **Resources** doc Type
- Select **Capture**
- Select **Submit**
- Create a manual task in KEES for the blue team to **process Review**
- File documents in 60 day retention area.

The screenshot displays the 'ImageNow Viewer - Package - [Page 1]' interface. The main window shows a 'Review Form' for the 'Kansas Department for Children and Families'. The form includes sections for 'Agency Use Only', 'Household Information', and a table for listing household members. The 'Package' pane on the left shows a tree view with 'DCF Non-Medical' and 'Non-Medical Review' highlighted. The 'Properties' pane on the right shows document keys for 'KEES DCF Non Medical', 'Case Number 01278845', 'Case Name Sarah Trainings', 'Field 3', 'Received Date 12/03/2013', and 'Document Type Non-Medical Review'. The bottom toolbar shows a 'Submit' button highlighted with a red box.

Example 6: Interim Report

FOOD ASSISTANCE INTERIM REPORT

Example 6: Interim Report

Sarah mails in her Food Assistance Interim Report with no changes or attached documents. The IR is sorted, attached to the Non-Lobby Imaging Tracking Sheet for IRs and placed in the Registration location. Linda accesses Sarah's case in KAECSES, registers the IR and creates a manual task in KEES for the Blue team. The IR is imaged as hot to the DCF Non-Medical Drawer. Julie claims the task and processes the IR in KAECSES. Julie updates the task status reason to complete in KEES.

69

Example 6: Interim Report

- Locate **Non-Medical Case** in KAECSES. Copy case#. Be sure IR is registered.
- Set ImageNow Capture Mode to **Package**.
- Set ImageNow Application Plan to **KEES Non-Medical**.
- Select **Capture**
- Enter **Received Date**

70

Example 6: Interim Report

Document Keys:

- Drawer = **KEES DCF Non-Medical**
- Copy and paste **KAECSES Case#** to the Case Number field.
- Enter **Case Name** in Case Name field as it appears in KAECSES.
- Verify **Received Date**.

Package:

- Select **DCF Non-Medical**
- Within DCF Non-Medical, select **IR** document type.
- Select **Capture**
- Select **Submit**
- Create a **manual task** in KEES for the blue team to **process IR**.
- **File documents** in 60 day retention area.

The screenshot displays the 'ImageNow Viewer - Package - [Page 2]' interface. The main window shows a 'FOOD ASSISTANCE INTERIM REPORT FORM' (ES-3114 01-1) with fields for Name, Case Number, Address, and City/State/Zip. Below these are instructions and a list of questions to be answered. The left sidebar shows a document tree with 'DCF Non-Medical' selected, and 'IR' and 'Page 1' highlighted. The right sidebar contains a 'Document Keys' section with fields for Drawer (KEES DCF Non Medical), Case Number (01278945), Case Name (Sarah Training6), Field 3, Received Date (12/06/2013), Unique ID (301YXD6_002H38QYW000BQF), and Document Type (IR). A 'Notes' section is also visible at the bottom right.

Unsigned Documents

- Unsigned documents should **not be date stamped** with a received date.
- Unsigned documents staying with DCF will **not be imaged** and receipt of the documents will **not be logged in KEES**.
- **Unsigned DCF applications will be mailed to the consumer** with an “Unsigned Application” letter.
- Clerical Staff will be responsible for mailing unsigned documents back to the consumer.
- The Mail Receiver/Imager will need to **utilize imaging to route unsigned documents to the Clearinghouse**. Clearinghouse unsigned documents should be indexed to the Unsigned CH Application document type.

Unknown Documents

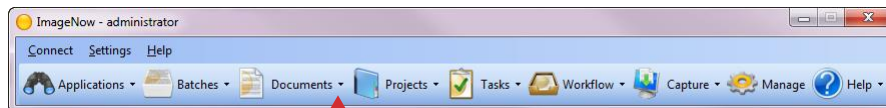
When an image cannot be associated to a person or a case it will be stored within the "KEES Unknown Case - DCF" document drawer within ImageNow.

- The Unknown Document drawer will be **shared statewide** among all DCF KEES users.
- **Person First Name and Person Last Name are required indexing fields.** If First and/or Last name is not known, staff are to enter "Unknown" in the corresponding field(s).
- Staff should **enter the office location in the name field along with the name** as shown below.
 - Unknown documents will be imaged using the location, first name, and last name. First name = Hays Jane Last Name = Hays Doe
 - Unknown documents where only the first or last name is known
First name = Hays Jane Last Name = Hays Unknown
First name = Hays Unknown Last Name = Hays Doe
 - Unknown documents where the name is not known
First name = Hays Unknown Last Name = Hays Unknown

Imaging Job Aid: Capture, Retrieve & Re-Index Unknown Case Documents

73

Document Search



To retrieve documents use the ImageNow toolbar. 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.

NOTE: Users should be encouraged to perform searches within the specific Document View Filters to avoid performing an "empty" search.

74

Document Search

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

75

Document Search

The screenshot shows the ImageNow Explorer interface with a search for Case Number 5006781. The results table is as follows:

Drawer	Case Number	Case Name	Person MPI	Person Name	Batch ID	Document Type	Received Date
KEES DCF Non ...	5006781	Bolton			301YX8W_001S1...	Application	08/28/...
KEES DCF Non ...	5006781	Orville Bolton		9/25/2013	301YX9S_001Y5...	Income	
KEES DCF Non ...	5006781	Orville Bolton		9/25/2013	301YX9S_001Y5...	Income	

Annotations in the image include:

- A red box with an upward-pointing triangle and the text "Use sorting ▲ to sort column results." pointing to the Case Number column header.
- A red box with an upward-pointing arrow and the text "Click on the document to view." pointing to the first document row.

Job Aids

Imaging: Document Views
 Imaging: Quick Search
 Imaging: Search by Received Date

76



Register

Non-Medical then Medical

Image

Medical then Non-Medical

77

Additional Resource Information

KEES Job Aids are currently located on the KansasTrain website but will be moved to the KanCare website:

- <https://ks.train.org>
- <http://www.kancare.ks.gov/kees-train/Info/Training/Content/KEES-Info-Training.htm>

Information can also be found on the DCF intranet site.

- KEES information is located under current events
- Checkout the EES Change Discussion Guide for additional information:

<http://srsnet/commissions/ees/kees/Change%20discussion%20guides/changediscussionmain.htm>

78



Questions & Answers from Webinar

- A Clearinghouse Application was received and imaged to the Clearinghouse. A week later client follows up on the application by bringing in information for the Clearinghouse to the local DCF Office. Would this information then be faxed or imaged to the Clearinghouse?
 - ✓ The Clearinghouse has requested DCF fax this information to them.
- Is 2nd person indexing needed if only one person is on case?
 - ✓ Person Level indexing (2nd level indexing) will follow the person wherever they go. Always person level index documents on Medical cases. Person level indexing cannot be done on Non-Medical Cases during P2
- Will support staff be doing indexing?
 - ✓ Support Staff will be indexing documents to the applicable document type and 2nd level indexing personal identifying information on medical cases. Workers can also complete these functions as needed when it is identified that the process was not initially completed during imaging.
- In ImageNow will workers have to search thru documents to find documents?
 - ✓ On the ImageNow Explorer, workers can locate the documents by case #, then use the sort features on the column headings to sort the documents by received date. This will allow workers to easily identify documents received on the same date or shortly after the received date if additional supporting documents were turned in after the initial application but before the worker processes the case.
- Is Eform used for identifying data for non-medical cases only?
 - ✓ The Eform can only be used on Medical Cases (KEES Cases) at this time.
- Applications received for Medical and Non-medical will you use Eform?
 - ✓ Copy supporting documents for both applications. Register non-medical first then medical. Image to medical first and to nonmedical case. Support staff can image both applications and support documents separately. For loose mail, image the documents to the medical case then copy to non-medical. 2nd level index Personal identifying information for the medical case. Cannot 2nd level index on non-medical.
- Is there a specific document type for Work Programs?
 - ✓ Use DCF Non-Medical package basket and Work Program document type. Use KAECSES case# for work program documents.
- Should a task be created before imaging?
 - ✓ Based on the non-lobby document process, the setting the manual processing tasks occurs between registration and imaging. However, in some offices, setting the manual task will occur after imaging. Regardless of when the task is set what is most important is to make sure the task is created so the worker is notified that documents are ready for processing. Speak with local leadership to determine whether task is created prior to or after imaging.

79



Questions & Answers from Webinar

- Are SSI medical applications with no Medicare sent to the Clearinghouse?
 - ✓ Yes, if the applicant does not meet the Big 4 criteria, the application will be imaged to the Clearinghouse with a document type of Potential CH application, and may be routed back to DCF.
- Is income indexed to person level?
 - ✓ No, only personal identifying information receives person level indexing.
- What does quantity mean on tracking sheet for imaging? Is an application considered one?
 - ✓ Quantity means how many, for example, how many applications, etc. This is not a hard fast 25, if you have 26 of one type, do not need a new sheet. An supporting documentation stays with the application counts as 1. Three pieces of loose mail from the same client would be paper clipped together and count as 1.
- Has the ID scanning been fixed yet?
 - ✓ EES CO directive is to image the Driver's License with all other documents. Photocopy the ID first. We do recognize sometimes it may be hard to read but with other supporting documents, we should be ok. You may need scan and InPrint image as an alternative. Remember all personal identifying information should be photocopied and imaged with one form of ID per page so the document can be person level indexed to each household member.

80