This Training manual explains concepts and procedures needed to operate the Department of Children and Families ACCESS Document Imaging System (ADI). This system allows ACCESS Florida to provide a cost efficient, easily accessible method of storing documents used to determine eligibility and support benefit recovery, quality control, hearings and ACCESS Integrity findings.

The Document Imaging system allows staff statewide to scan documents and then access those documents as needed from any computer statewide, which has access to the intranet inside the DCF firewall.

There are two parts which make up the ACCESS Document Imaging system
- ESS Document Scanning
- Document Viewing

**ESS Document Scanning**
ESS Document Scanning (ESSScanNET) is a software program that must be loaded onto the computer that is being used to scan the documents. The individual scanning the document assigns a Document Type and Sub-Type thereby identifying what kind of documentation is being submitted. The user will also link the image with individual demographic information. This is known as indexing the document. This allows a method for retrieving the image via Document Viewing.

ESSScanNET allows you to enter the information regarding the scanned images using both a computer keyboard and mouse, or by using a touch screen. Each PC that has the ESSScanNET software is individually set up for desktop or touch screen.

During the indexing process the document is linked with demographic data from FLORIDA, which is retrieved on a nightly basis. For this reason, it is recommended that cases be known to FLORIDA prior to scanning. It is possible to manually index documents when not known to FLORIDA yet.
Document Viewing

Document Viewing is the web-based portion of the system that is accessed through a URL on the Intranet, inside the DCF firewall. Document Viewing provides access to scanned documents throughout the state. Access to certain types of documents is based on User Groups/Profiles.

In addition, Document Viewing provides access to reports that can be used as management tools by supervisory staff.

Confidential Information

The Document Imaging System continues to enforce the department’s standards regarding confidentiality. Therefore any and all images produced from documents received by the clients or representatives are subject to the department’s confidentiality procedures. For this reason, only those individual assigned a confidential profile will be able to access and view the images of documents associated with confidential cases and/or certain confidential Document Types and Sub-Types.
Document Imaging - Scanning

Desktop System

- Upon launching the ESS Scan (ESS Document Storage System), the first thing you will see is the Open File – Security Warning window. Click on Open to start ESS Scan.

![Security Warning Window](image)
Select the red Login button in the upper right side of the screen to logon.

Once you have started ESS Scan, another window called FileMover will open. This window will automatically be minimized in your task bar. This window is a part of the process for scanned documents being sent to the Document Imaging system. Do not close this window unless you are closing out ESS Scan also. Please note that the Move To section must display in green. If it does not, please contact your technical support staff.
After selecting the Login button a new window displays requesting your Usercode and Password.

- The Usercode is your FLORIDA ID. Certain individuals may use their People First ID.
- After entering your Usercode and Password select the Green Check button.
- The very first time you access ESS Scan (also known as ESS Document Storage System) you will be required to change your password. The same is true following a password reset. After three failed attempts, your account will be locked. Your local Security Officer or the DCF Help Desk will need to unlock your account.
- By selecting the red key in the Login box, you are able to change your password at any time.
- After successfully logging in, the Log in button will change to the color green.
The main page has four major entry sections:

1. Client Information
2. Notify Worker and Forward Group
3. Document Type and Sub Type
4. Archive Box

- The **Client Information** fields are used to link the scanned images to individuals known to FLORIDA and/or KidCare system.
- The **Notify Worker** field can be used to notify a user regarding a scanned image. When the Notify is sent, a non-Work Group related inbox message is sent.
- The **Forward Group** field can be used to send the scanned image to a specific Work Group for additional processing. A Work Group related inbox message will be generated to a Work Group member after it has been assigned.
- The **Sub Type** field is used to assign a document type and sub-type to an image for file storage and retrieval purposes.
Indexing of documents is done for each page and by the person with which it should be indexed. This means that documents belonging to a person can be retrieved regardless of any which case they have been or are now listed.

When indexing the following is important to remember:

**ESSScanNET**

**Before documents are scanned, individual demographic information must be obtained and entered into the system.**

- When a user enters either a FLORIDA case number, SSN or Medicaid/PIN a search will be conducted. The search is done against an extract from the FLORIDA system. If the client has never been known to the FLORIDA system, either in a Case or an RFA (CRAD), it will not find a match. You will be able to manually enter new client data.

- If you search using the Case # and a match is found where only one client has been associated with that number then all demographic information retrieved will be automatically populated in these fields.

- If you search using the Case # and there is more then one person associated with that number the system will display all individuals that have ever been associated with that case number by displaying the **Person Search** screen.

- If you search using either the SSN or Medicaid/PIN and a match is found, all demographic information retrieved will be automatically populated in these fields.

- The case number is informational only. Documents are indexed to the person. This way it doesn’t matter which case number the person has been associated with a search using any prior or current case number will retrieve all that person’s documents.

- To clear the Client Information and perform a new search, select the **White Page** icon immediately after the Medicaid # field.

- KidCare staff may enter the KidCare number in the Case # field (Ex: K1234567) and other demographics manually. This way information may retrieved in Imaging with the Kidcare number when there is no FLORIDA case number.
If the FLORIDA Case #, Social Security Number or Medicaid (PIN) numbers are not known by the user, it may be possible to retrieve that information using a person search.

- By clicking on the magnifying glass in the top left portion of the screen, a smaller window, called Person Search, will display.
- Entering Last name, First name and Date of Birth (optional), will allow you to complete the Person Search. It is recommended that you use a few letters in the Last and First Name fields to narrow your search.
- When you are ready to search, click on the magnifying glass on the top right side of the Person Search window. This will perform a search of the nightly FLORIDA extract.

After clicking on the Magnifying glass in the Person Search window, a list of all individuals from the FLORIDA extract that matched your selection criteria will be displayed.

- This will provide a list of all of the FLORIDA case numbers matching the Last Name, First Name, and DOB criteria that was entered.
- This search may bring back several matches.
- After verifying the correct selection, double click on it or click on the green check to populate this information into the Client Information portion of the main page.

**Remember:** This information is pulled from a FLORIDA extract nightly. If a client registration CRAD only or CRAD and ASIA driver has been completed...
today for someone never known to FLORIDA, the client information will not display in the extract until tomorrow.

In addition to the person demographics certain case information is also displayed in the Person Search results.

- The **Case Status** column will display the following information:
  - For a Case the results will be either C – Closed, O – Open, P – Pending. For an RFA/Client Registration (CRAD) the results will be either P – Pending, W – Withdrawn, D – Denied, R – Processed.
- The **Person Status** column will display the following information:
  - This is determined by the person’s status in the Case/RFA. A - Active, I – Inactive, PP – Primary information Person.

When the person is not found in the FLORIDA extract the user will need to manually add the person for indexing.

- Once the person demographics have been entered the user will click on the **Add Person** icon and it will display the newly created person in the lower section of the Person Search screen. Once added the new person will be available for selection again.
Worker & Group Information

The Notify Worker and Forward Group fields are used for the following:

1) Notify Worker – Sends an inbox message to a specific worker regarding documents scanned/indexed.
   - and/or -
2) Forward Group - Assigns the scanned/indexed images to a specific Work Group for additional processing.

Customer Call Centers, Circuit Case Maintenance Units, Customer Service Centers and Program Offices may use Work Groups. Work Groups can be specialized to handle certain functions, such as Medically Needy Bill tracking.

When you click in the Worker Notify field, you will be directed to the Worker Search screen.
After you have entered your criteria in the Worker Search box you will click on the Magnifying glass. This will search through all Document Imaging system users.

- Depending on the search criteria, the system may bring back several matches.
- You may enter the message you wish to send to the user in the Message box.
- After verifying the correct line, double click or select the green check to populate this information into the Notify Worker portion of the screen.
- When you select the **Forward Group** field, you will be given the option to select the **Work Group** which will receive the assignment.

- The **Forward Group** assignment creates an inbox message only after a Work Group member has made himself/herself available in the Document Imaging and is assigned that particular document. Work Group assignments are only sent to one user at a time.

- To send the document to a specific Work Group for processing, you will select the **Group Type** and then select the **Group to Notify**. There may be multiple Groups for each Work Group Type.

- You may enter a message you wish to send with the Work Group assignment in the **Message** box.

![Screen Capture of Group Type and Group to Notify Selections]

**Note:** Whatever circuit the user logged on is associated with will be the first **Group Type** to appear in the selection box. All other circuits will display after the user’s own in numerical order.
Document Scanning

After the person/case information is found or entered manually, the documents are ready to be scanned.

- Once the client information has been populated, place the documents to be scanned into the document feeder of the scanning device and click the scanner icon.
After all of the documents have been scanned the first image will appear on the left side of the screen as shown below. This is the image display window.

The icons play an important role in managing the scanned image.

- The **Page Display** icon allows multiple images to be viewed at the same time.
- When scanning multiple documents, the **Paging** arrows above the image display windows allow you to move between the first and the last pages of the scanned images.
- The **Rotate** icon can be used to flip or rotate the image as needed.
- The **Trashcan** icon is used to delete scanned document pages you do not wish to index and submit.
- The **Scanner** icon is selected to begin the scanning process.
- The **Arrow** icons in the middle of the screen are used to move the image from the **Image Display window** on the left to the **Indexing window** on the right. The image can be moved back and forth between the windows.
- The **Blank Sheet** icon allows you to clear out the Image Display window completely.
**Document Types and Sub-Types**

All pages of scanned images must be assigned a Document Type and Sub-Type.

- Once a page has been moved to the Indexing Window the next step is to click in the **Sub Type** field. A new window containing the different Doc Types will be displayed. The user will select which Document Type and Sub Type should be assigned to the page that was moved to the Indexing Window.
- Only one person and one document type can be assigned per page.
- Multiple pages can be assigned to a person and Document Type and Sub-Type.
- A document type must be assigned for all images moved into the **Indexing Window**.
- Whenever scanning a document that is listed under more then one person, the PIP should be selected.
- Documents containing multiple Sub-Types need to be physically separated.
  - For example one page with multiple Social Security Cards.

*There will be a future enhancement to ESS Scan to include the ability to crop images.*

- Once the user has selected the Document Type/Sub-Type they will click the green check mark icon which will bring the information into the Sub Type field.
To complete the indexing of the page(s) the user **must** click on the **Continue** button.

Once the Continue button is clicked, the Document Type/Sub-Type information is added to the **Running List** and in the upper right hand corner of the Indexing Window it will display the words **“Page Indexed”**.
- The **Running List** is what tracks all the indexing information for the document.
- It is recommended that you review the **Running List** to ensure the accuracy of your indexing prior to submission. Click on the **Running List** button to bring up the information.

In this example page 1 was indexed as Permanent Record – Birth Certification and page 2 was indexed as Permanent Record - Driver's License.

- Be sure to change the person information as you index the pages when appropriate so the documents will be indexed with the correct person in Document Imaging.
- When indexing all pages that are for the same household they will be submitted together all at once.
- The exception to this rule is when there is Confidential information. That information would be submitted as a separate document.
  - For example a Doctor’s statement with confidential medical information would be submitted separately from the other household documents, such as income, permanent record, etc.
- When you scan documents at one time for multiple households you must submit them separately.
- Once all pages that need to be indexed have been assigned a Document type, select the **Submit** icon to send the image(s) for processing. After the image is processed it will be viewable in Document Imaging.
The Archive Box Number field will display if the specific scanner has been set up to display this field.

- The archive box is a management tool for quality assurance. It is used to track the location of paper documents that have been scanned.

- Circuits may shred documents on a daily basis provided they are confident that their staff is comfortable with the process and equipment, and they are using the Validation Log monitoring procedure daily.

- Circuits may keep documents longer if they determine that to be appropriate. If they are not shredded immediately, they should be maintained in numbered “archive” boxes.

- If the same box is used over the course of several days, it is recommended that the box be kept until 90 days from the date the last document placed in the box was scanned.
• This allows supervisor staff time to monitor or retrieve documents if needed.

• Once the 90-day period has expired, the paper documents in the “archive” box may be shredded.

When a Box Number is selected for the first time by a scanner it is then locked for use by any other scanner in that circuit. This means that any other scanners in that circuit will not be able to choose that box number in their selection list.

1. The Archive Box No that was last used will automatically populate in the Archive Box field. If the Archive Box No field was left blank at the last sign off of ESS Scan, then it will be blank at the next login.

2. If you will not be placing the scanned documents in an Archive Box you simply remove the Archive Box No by clicking on the Clear Archive Box Number button (Blank Sheet of paper icon).

Examples of when you may not use the Archive Box number:
   - You are scanning Confidential AIP notes
   - You are scanning originals such as Driver’s Licenses, Birth Certificates, etc.

3. Archive boxes that are Open (for that Scanner id) may be selected from a list. You bring up the list of boxes by clicking your mouse in the Archive Box field.

   You may have more then one archive box for a particular scanner if you are storing confidential information in separate boxes. You also might choose to have each Archive Box designated to individual users as a management tool and/or reporting purposes.
This example shows that for Headquarters (D99) Boxes 3 and 5 are open boxes FOR THIS SCANNER.

4. Once the Archive Box is full (meaning you can no longer place any more physical documents in the box) you will need to close the current Archive Box.

To close an Archive Box you will do the following:

a) **Scan** the document that will be the last one you place in the Archive Box.  
b) **Index** the final document for this box.  
c) **Select** the Archive Box number that you wish to close.  
d) Click the **Close** checkbox. You will receive a warning message to confirm that you wish to close this Archive Box.
Warning message

e) **Submit** the document that will be the last one to go into the Archive Box.

**All of these steps must be completed in order to close an Archive Box number.**

5. Once an Archive Box is closed it will no longer be available to select for use from the Archive Box List. **Remember: it also will not appear if another scanner id has already selected it.**

6. When you are ready to start a new Archive Box number, you will select the **New** box number from the Archive Box list.
If you attempt to scan using a **New** Archive Box number that has already been selected and *used* by another scanner, you will receive the following error message:

*Archive Box Reports*

To bring up the Archive Box reports simply click on the icon with the Paper & Magnifying Glass. The report can be printed, enlarged, minimized, etc. by using the available tool bar.
This will bring up the following selection Window:

![Archive Report Selection](image)

- **Report For Case Number:**
- **Report For Social Security #:**
- **Report For Box Number:**

You have the option to select a report by Box Number, by Case Number (which shows all archive boxes for a particular case) or by Social Security # (which also shows all archive boxes for a particular SSN).

**NOTE:** You will be able to pull reports for current or old Archive Box numbers by entering the box number in the **Report For Box Number** field.
Archive Box Report

- Header title includes the Box Number
- Date the Archive Box was opened and closed (if applicable)
- SSN for the image is on the report
- The scanner id that scanned the image is on the report
- The Scan Date is displayed
- The Document Type is on the report
- Scanned By is on the report

Clicking on the binoculars icon , enables the search function that can be used to locate a specific case number or client’s name
## Archive Report for Case Number

*************** scroll down

<table>
<thead>
<tr>
<th>Scan Date</th>
<th>Box Number</th>
<th>Document Type</th>
<th>Pages</th>
<th>Scanner ID</th>
<th>Scanned By</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/04/2006 04:04 PM</td>
<td>2</td>
<td>Notices</td>
<td>1</td>
<td>HP290CU77T0446</td>
<td>Heather Keegan</td>
</tr>
<tr>
<td>12/08/2006 10:46 AM</td>
<td>4</td>
<td>Quality Control</td>
<td>1</td>
<td>HP290CU77T0446</td>
<td>Heather Keegan</td>
</tr>
<tr>
<td>12/07/2006 03:23 PM</td>
<td>4</td>
<td>Verification</td>
<td>1</td>
<td>HP290CU77T0446</td>
<td>Heather Keegan</td>
</tr>
<tr>
<td>12/12/2006 10:43 AM</td>
<td>99000001</td>
<td>Permanent Record</td>
<td>1</td>
<td>HP290CU77T0446</td>
<td>Heather Keegan</td>
</tr>
<tr>
<td>12/13/2006 11:30 AM</td>
<td>99000001</td>
<td>Permanent Record</td>
<td>1</td>
<td>HP290CU77T0446</td>
<td>Heather Keegan</td>
</tr>
<tr>
<td>12/20/2006 02:26 PM</td>
<td>99000002</td>
<td>Permanent Record</td>
<td>1</td>
<td>HP290CU77T0446</td>
<td>Heather Keegan</td>
</tr>
<tr>
<td>12/22/2006 10:48 AM</td>
<td>N/A</td>
<td>Quality Control</td>
<td>1</td>
<td>HP290CU77T0446</td>
<td>Heather Keegan</td>
</tr>
<tr>
<td>12/25/2006 10:46 AM</td>
<td>N/A</td>
<td>Confidential AIP</td>
<td>1</td>
<td>HP290CU77T0446</td>
<td>Heather Keegan</td>
</tr>
<tr>
<td>11/22/2006 11:43 AM</td>
<td>N/A</td>
<td>RFA</td>
<td>1</td>
<td>HP290CU77T0446</td>
<td>Heather Keegan</td>
</tr>
</tbody>
</table>

Total Scanned Records: 10  
Total Scanned Pages: 10

- Header title includes the name associated with the case number
- The Scan Date is displayed
- Box Number in which each document was placed

**NOTE:** This report shows all information scanned for the Case Number, even if it is not associated with an Archive Box number.

- The scanner id that scanned the image is on the report
- Scanned By is on the report

Note: Items will not appear on any archive report immediately after they have been scanned. They must be in Document Viewing to be included on a report.
Touch Screens may be used in some sites with **ESSScanNet**. The touch screen works the same as a regular keyboard. The only difference is that the user is physically touching the screen to enter information into the system.
Document Imaging - Viewing

The Document Imaging System allows the user to view and manage images stored within the system.

- Production URL: [http://imaging.dcf.state.fl.us/](http://imaging.dcf.state.fl.us/)
- Username is the account used for the FLORIDA system. Some users will log in with their People First ID.
- The Username and password for both Scanning (ESS Scan) and Viewing are the same.
- The password can be changed in either the Document Scanning (ESS Scan) or in Document Viewing.
  - ESS Scan will not allow the use of a special character. Users should not set their password in Document Imaging to include a special character.
- Passwords will be revoked after three incorrect attempts.
The Viewing System has six components: Menu/Inbox,Courtesy Notifications, Reports, Work Group, Maintenance and Support Screens

- **Menu** option provides the user with the ability to search and view documents. From the **Inbox** the user can send and receive messages (Non-Work Group related) regarding scanned images. The user will also receive in the Inbox, Work Group assignment messages.
- **Courtesy Notifications** option allows the user to set up Courtesy Notifications and review the Document List [a list of documents processed in the last 30 days for which the user has a Courtesy Notification set].
- **Reports** option gives users the ability to generate detailed reports on scanned documents, system users, etc.
- **Work Group** option allows a manager or supervisor to manage Work Group users. It allows Work Group members to be Available or Unavailable for assignments.
- **Maintenance** option allows administration the ability to create or inactivate users. *User Groups is only accessible by Headquarter Admin staff.*
- **Support Screens** section is only available to Headquarters Admin staff.

### Menu
- Inbox
- Person Document Search
- Work Group Search
- Document Monitoring
- Logout

### Courtesy Notifications
- Notifications List
- Documents List

### Reports
- Code Table
- Documents by Client
- Documents by Model
- Documents in Queue
- Documents by Scanner
- Documents by Status
- Documents Scanned by User
- Documents by Work Group
- Errors By User
- Missing Children
- Scanner Fax Statistics
- User Statistics
- Users by Profile Group
- Users by Work Group

**Menu** options appear for all users.

**Courtesy Notifications** options appear for all users.

**Reports** options appear for all users, except for Security staff.
**Work Group** option – **Status**: Unavailable / Available <Change Status> appears for all users who have the ability to be assigned to a Work Group.

**Work Group Users** – appears for all Supervisors who have been given the ability to move Work Group users from one Work Group to another.

**Maintenance** options appear for Admin staff. Security and Help Desk also have access to Manage Users under this menu.

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**Menu**

The menu section has four sub-components.

1. Inbox
2. Person Document Search
3. Work Group Search
4. Document Monitoring

**INBOX**

- The **Inbox** allows users to receive and send messages regarding images. Messages may be Work Group related or not Work Group related.

- There are four ways for a user to receive messages:

  1. The user can set up a **Courtesy Notification** to alert them when an image for a specific case is indexed.

  2. A message can be sent from ESS Scan when the document is scanned and indexed using the **Worker Notify**. The same process can be used in Viewing during the indexing process and is called **Notify Circuit/Person**.
3. The user will receive an inbox message when they are given a Work Group assignment.

4. The user can send an internal message to another user in Document Imaging.
- Inbox messages can be sorted by All, Work Group or Non Work Group Messages.

Filter:
- All
- Work Group Messages
- Non Work Group Messages

### Person Document Search

- The **Person Document Search** screen allows the user to search for documents using combinations of the following fields: Case/RFA#, Medicaid ID/PIN, Kidcare ID, SSN, Category/Document Type/Sub-Type, Last Name, First Name, DOB, Document #, Scan/Fax Date & Time From, Scan/Fax Date & Time To.

- Once the desired search criteria have been selected, click on the Search icon to process the request.

The **Person Search Results** will display next, except when the Document # is used or when there is only one possible match. When there is only one possible match it will immediately display the **Document Details Screen**. It is recommended that if a search by one method, for Example: Case #, yields no results, conduct another search using different criteria.
**Person Search Results** fields are as follows: Name (displayed as Last Name, First Name), Case/RFA # associated with that person, SSN, DOB, Sex Race and Medicaid ID/PIN associated with that person.

The **Case Status** field will be one of the following: O – Open, P – Pending (case or RFA), C – Closed, R – for a processed RFA that has not become a Case yet (example is when the driver was started but not moved past AIID), W – for a Withdrawn RFA that never became a case or D – Denied RFA.

The **Person Status** field will be one of the following: A – Active (case), I – Inactive (case), or PP – Pending Person (RFA). A person is Active when they are an Active Case member on AIID, regardless of the Case Status. Inactive indicates that they have been in the case (member # assigned) but are not an active case member on AIID.

The **Select** checkbox allows you to pick which person’s documents you wish to view. You may also use the **Check All** button to select all persons when they are multiple results returned.

When you are ready to see the document results click on the **Get Detail** button.
Document Details Screen has two sections. The top portion is where the user may filter information out. The bottom portion is where the search results are displayed and the document can be accessed.

- PIP LastName and FirstName will only display when the case number is used to search.
- The user can filter the results by the Category to which the document was indexed. The user will click on the desired category and it will automatically filter.
- Additional filter options that were available on the Person Document Search screen are listed again. The additional filter options must have the Apply Filter initiated for the filter to occur.

Document Detail - Results columns:

- **Document #** - this is a link that will open the image when you click on it. Many times a document is indexed with different document types/sub-types and different persons all within the same document.
- **Name** – this is the Last Name and First Name of the person with whom the document was indexed. A document may have specific pages identified with different person(s). Documents are indexed by person and by page.
- **Document Type** – the type that was assigned to identify the document.
- **Sub Type** – the sub-type that was assigned to identify the document.
- **Status** – the document status will be Indexed, Error or Deleted. An Error status document needs some type of action taken. Only staff with certain profiles can view documents that are in a Deleted status.
- **Scan/Fax Date** – this is the date and time that the document was created. For example the date it was scanned, the date it was created as a PDF by staff, the date the document was faxed to the department or the date it was uploaded through My Account.
- **Pages** – this is the number of pages associated with the particular Document Type/Sub Type identified.
● **Assigned** – if the document is part of a Work Group assignment and it is assigned to a user, it will display the user’s name in this column.

● **Work Group** – if the document is part of a Work Group assignment the Work Group name where the document currently resides will be displayed.

● **Messages** icon – when the user clicks on this link any messages associated with this document will be displayed.

● **Document History** icon – when the user clicks on this link it will display the document history report for the document.

● **Error Reporting** icon – if the document needs to be error reported (for correction/deletion) the user will click this icon and direct the document to the appropriate error work group.

**Access to view a document is limited by the user group/profile of the USER logged into the system.**

If the User does not have the proper security for the scanned document a message will display in place of the image.

![Error Message]

If any part of the document is indexed to a Document Type which is not authorized for the user, it will block them from viewing the entire document.

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**Courtesy Notifications**
Courtesy Notification is a function that allows a user to be notified that an image for a specific case has been scanned into the system. These notifications (messages) appear in the User's Inbox.

Please refer to the

**Courtesy Notifications Guide**

Found at the following website

http://eww.dcf.state.fl.us/~ess/modern/Courtesy.pdf

Please refer to the

**Document Imaging Reports Guide**

Found at the following website

Work Group Search fields:

- **Region** – this is the old District number and the region to which it belongs.
- **Work Group Type** – this is described with the correct circuit name. This is the second level hierarchy for the work group assignments.
- **Work Group (Name)** – this is the last level for the work group assignment.
- **Assigned To** - this is where the user may select a particular work group member and view only that user’s assignments.
- **Scan/Fax Date From** – the search may be limited to a particular date that the document was created.
- **Scan/Fax Date To** – the “To” date may be entered but cannot be entered without a “From” date.

Documents are “assigned” to a work group user by a process call Workload Manager. This happens after the documents are forwarded to a work group at indexing, re-indexing, or when reported as an error.
**Work Group Search** results *(label reads Document Search)*

The results will display with a thumbnail that is created from the first page of the image. New documents created through the Indexing screen will not display a thumbnail. Instead they will display the following image:

![Click Here for Document](image)

Most of the fields displayed on the Work Group Search results are the same as the ones on the Document Details results screen. The following fields are not seen on the Document Details results screen:

**Process Date & Time** - the date and time that the document was processed into the system.

**Kidcare ID** – if the document has been indexed with a Kidcare Case ID it will be displayed here.

**Device Type** – this is the origination source for the document.
The icons that display on the Work Group Search results screen:

- **Process** – this will only appear for the Work Group assignee. This icon (mark this work group assignment as complete) will only appear if the document is already Indexed. It should be clicked when the user wants to clear the assignment and does not need to make any changes to the indexing information.

- **Index** – this will only appear for the Work Group assignee. Clicking this icon will take the user to the Indexing screen.

- **Forward** – this will only appear for the Work Group assignee. Clicking this icon will take the user to the **Forward Document to New Work Group** screen. A document may be forwarded to a non-error reporting work group only. This forward will only be to work groups within the user’s own circuit. To forward to a Work Group in another circuit the user must go to the Indexing screen, index and forward the document.

- **History** – this will appear for all users. Clicking this icon will take the user to the Document History report. The report contains all actions taken on the document.

- **Error** – this will appear for all users. Clicking this icon will take the user to the **Report an Error with this Document** screen. This error report will only be to work groups within the user’s own circuit. To error report to a Work Group in another circuit the user must go to the Indexing screen, **not** index and select an error group to send the document.

- **Messages** – this icon will appear for all users. Clicking this icon will take the user to the **Work Group Message** screen. All Work Group related messages will be displayed. Messages are may be added when Forwarding, Error Reporting and also when using Worker Notify.
Delete – this icon will only appear for the Work Group assignee. This is an option the user has to delete an entire document at once. If only certain pages are to be deleted the user must do so through the Indexing screen. A warning message will appear to confirm the user wishes to change the document to status Deleted.
Work Groups

Overview
Documents that are not scanned but received via some other method (such as Fax, Scan from MFD, Print to PDF, DVSCapture) without indexing information, will be assigned to Work Groups to be indexed. Images already in the system that need action taken on them may also be assigned to Work Groups. Information about how Work Groups work will be covered next.

- Documents that are considered Errors are assigned to an Error Reporting Work Group.
- Unindexed documents are normally assigned to a Main Inbox Work Group. Examples of areas that have a Main Inbox are: Customer Service Centers, Call Centers and Case Maintenance Units.

Additional Work Groups may be created based on need. To request set up of Work Groups please contact:

ACCESS Technology - Document Imaging Administrator
Heather Keegan

Security Officers will add users in the Work Groups as requested by circuit staff.

Work Group Types (Examples)
Circuit XX
CXX Customer Service Center (CSC)
Call Center (CC)
CXX Case Maintenance Unit (CMU)
Benefit Recovery
**Work Group Rule**: Work Group assignments are assigned to one person at a time.

**Work Group Rule**: Users can only be in one Work Group at a time.

A user can be moved from within one Work Group to another Work Group. They can also be moved from within one *Work Group Type* to another *Work Group Type*. This can be done by someone who has been designated as a *Supervisor* in their Document Imaging user profile. The *Supervisor* will go to the Work Group Menu and select the **Work Group Users** option. This will bring up a list of all the users in the same Circuit.

From the list there are two ways to search for the particular user you wish to find.

You can select a *Work Group Type* and the system will automatically give you the Work Group pull down list to make a choice from. Once a Work Group is selected it will automatically perform the search.

You can type in a user’s *Last Name* in the *Name* field and then click on the Search (Binoculars) icon to process the search.

Example: Last Name - **thomas**
This search will bring back all users with the last name **thomas** in this Circuit.

Lastly, you do have the option of looking through all Circuit users by searching each individual page. You get pages by click on the numbers at the bottom of the search results.

The parts of the Work Group User profile that can be changed by a supervisor will appear in the **Edit Work Group User** screen.

To make changes to a user’s Work Group settings you will click on the Edit icon (paper & pencil).
This will bring you to the **Edit Work Group User** screen.

**Work Group Users**

<table>
<thead>
<tr>
<th>Edit Work Group User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Admin, Headquarters</td>
</tr>
<tr>
<td>Work Group Type: Exception Processing</td>
</tr>
<tr>
<td>Work Group: HDQ Error Research</td>
</tr>
<tr>
<td>Available: ☐</td>
</tr>
<tr>
<td>Threshold: 10</td>
</tr>
<tr>
<td>Auto Clear Available: ✔</td>
</tr>
<tr>
<td>Auto Clear Assignment: ✔</td>
</tr>
</tbody>
</table>

The fields that can be changed are: **Work Group Type**, Work Group, Available, Threshold, Auto Clear Available and Auto Clear Assignment.

Example: Headquarters Admin is in the HDQ Error Research group. He needs to be moved to a different group based on workload. Simply click the pull down list and make the selection.

First change the **Work Group Type** (if necessary)
Next change the Work Group

A **Supervisor** can change the user’s availability status for Work Group Assignments. The screen reflects the user’s current availability status and allows the supervisor to change the status by either selecting or deselecting as appropriate.

The **Supervisor** can modify the number of assignments that a user can receive at one time by choosing from the **Threshold** pull down. You can choose from 5 to 25 in increments of five. *Unlimited can only be assigned by Headquarters Admin staff.*

Being in a Work Group is like having your own private room for processing. When you become Available the door is open. You can only receive the number of documents that are equal to your threshold. If you remain Available, your door is still open and the system will continue to assign documents to your room. If you do not wish to receive any more documents in your room, then you need to close your door – make yourself Unavailable. Just click on Change Status to go from Available to Unavailable.

**Auto Clear Available** – when checked, this means Auto Clear Available is activated and the user will be made unavailable by the system each evening.
The user will need to change the status to Available the following day to receive new assignments.

**Auto Clear Assignment** – when checked, this means Auto Clear Assignment is activated and each evening the system will automatically take any unprocessed assignments for the user and put them back into the pool for redistribution the following day.

It is highly recommended that both of these options are selected for all system users. Some Work Group users may be set to keep their assignments until they have been completed. An example might be a user that processing medical bills – bill tracking assignments.

The **Save** option will save any changes made by the supervisor.

If the user already has (or may have) assignments and the **Supervisor** wants to move them to a different Work Group, they should perform the following steps in this order:

1) Make the user Unavailable.
2) Use the **Clear Inbox** icon.  

This will bring up a window

![Windows Internet Explorer](image)

Are you sure you want to clear the inbox?

[OK] [Cancel]

3) Click OK
4) Move the user to the new Work Group

If the user had any Work Group assignments this will ensure they are properly unassigned and can be distributed to another available work group user.

**Work Group Processing**

**Work Group Processing Rule:** Work Group assignments may be in Error status or Indexed status then **Error Reported** without indexing ONLY to an error processing group.
**Work Group Processing Rule:** Work Group assignments may be in either Error status or Indexed status and **Forwarded** without indexing ONLY to a non-error processing group.

You can **Notify** a specific user regarding a document that is being indexed via the Indexing screen. This will send them an inbox message that is non-Work Group related (it is not a work group assignment).

You can **Forward** a document that is assigned to you to another Work Group. This can be done from the Work Group Search results screen *(labeled Document Search)* or from the Indexing screen. If it is done via the Indexing screen the document must be indexed at that time. The Forward action will be part of the document’s history.

It is up to the supervisor to communicate to the user to which work group they have been assigned and the specific function of the group. It is up to the user to make himself or herself either “Available” or “Unavailable” to receive work group assignments. The supervisor can also change the user’s status if needed.

To process documents assigned to you as a work group member, you may access them through your inbox or the **Work Group Search** screen. Documents are assigned to a Work Group user by the Workload Manager part of the system.

The user may use the Filter to display Work Group related or Non-Work Group related inbox messages. *(Select the option from the drop down list)*

琢 The View icon will take the user to the Document Search results screen. *Once you are at the Document Search Results, it’s the same steps as if you went from the Work Group Search screen. The only difference is from the inbox you only see one at a time. Work Group Search you see 10 per page.*

ẳ The paper clip icon will only open the document for viewing without any other functions available
The delete icon only deletes the inbox message. This action **does not** process the work group assignment. This might be used if you have assignments left over that you will not be able to finish and you won’t be in the following day. After making yourself Unavailable, you could delete the assignments so they’ll be redistributed.

Click on the thumbnail image to view the document. The document will load and be visible in another window. Be sure to look at all the pages of the document, as there may be more than one case involved.

The other icons were previously discussed in the Work Group Search section of this guide.

**Error reporting of documents**

A document may be identified as an error if the following has occurred:
- It is a duplicate image or incomplete
- The Document Type/Sub-Type is incorrect
- The image has been indexed to the incorrect person(s)
- The image contains documents that were not “split up” (multiple cases in one image)

To report an error with a document you simply need to click on the phone icon (Report an Error with this Document)

**How do you delete a duplicate or bad image?**

After the document has been reported as an Error and assigned to the Error Reporting Work Group (with comments in the message area regarding the reason for error reporting) it may be deleted by using the Delete icon found on the Work Group Search results screen (labeled Document Search). No image is ever truly deleted from the system. It will be changed to a Status of Deleted and is still viewable by Administrative staff. The history of the document will also record the date/time and user that “deleted” the image. Note that if the document has never been indexed and is already in error status you may delete using the same process.

**How do you split up images apart if they belong to multiple cases?**

Once the user accesses the document from their assignments they can then proceed with indexing only certain pages of the image and then submit the image. The user will continue this process, updating the demographics as needed along the way, until the document has been completely split up and submitted correctly.
The first section of the Indexing screen is where you perform the search for the person(s) with which you will be indexing.

You may enter any of the following to search the FLORIDA extract information (FLODS). **Case ID, Medicaid/PIN, SSN, DOB, Last Name, First Name.** If the Case ID is entered it will display all persons that have ever been associated with that case number. To search using the customer's name entries in both Last and First Name are required. **DOB** cannot be used alone.

When selecting the person and there are multiple matches for the same person, it is not critical that the correct case number be selected. The critical step is selecting the correct PIN/person. When a user does a Document Search any case number that the person has ever been associated with will bring up all documents for that person.

The results will be displayed in the next section called **FLODS Results**

The fields displayed in this section are: **Last Name, First Name, Case ID, SSN, DOB, Medicaid ID, Case Status** and **Person Status**. There is a Radio button at the far left of this data. You will use that button to select the person for which you'll be indexing page(s). The Case Status will be listed I;kJ;kJ

The **Case Status** field will be one of the following: **O** – Open, **P** – Pending (case or RFA), **C** – Closed, **R** – for a processed RFA that has not become a Case yet (example is when the driver was started but not moved past AIID), **W** – for a Withdrawn RFA that never became a case or **D** – Denied RFA.

The **Person Status** field will be one of the following: **A** – Active (case), **I** – Inactive (case), or **PP** – Pending Person (RFA). A person is Active when they are an Active Case member on AIID, regardless of the Case Status. Inactive indicates that they have been in the case (member # assigned) but are not an active case member on AIID.
When no match is found in FLODS you will receive the message 

No Records Retrieved

Just like in ESS Scan if the person is not found in FLODS you have the option to manually Add the person to Document Imaging. The information for a manually added person will appear in the Manual Add section.

<table>
<thead>
<tr>
<th>Manual Entry</th>
<th>Last Name</th>
<th>First Name</th>
<th>SSN</th>
<th>DOB</th>
<th>Medicaid ID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Jones</td>
<td>John</td>
<td></td>
<td></td>
<td>9/05/1980</td>
</tr>
</tbody>
</table>

The next section on the indexing screen is the Current Index information.

<table>
<thead>
<tr>
<th>Current Index Information</th>
<th>Doc Number</th>
<th>Last Name</th>
<th>First Name</th>
<th>SSN</th>
<th>Medicaid ID</th>
<th>Case ID</th>
<th>Pages</th>
<th>Document Type</th>
<th>Sub Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>647174937</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Unknown</td>
<td>(Unknown)</td>
</tr>
</tbody>
</table>

The first field displayed is Doc Number which is the unique identifier for a specific document.

If the document is Unindexed then the Last Name, First Name, SSN, Medicaid ID and Case ID will be blank. Pages will always display the number of pages contained within the document. The Document Type and Sub Type will display Unknown if the document has never had indexing information associated with it. If the document has been indexed it will display the current indexing information by person and by page.
The next section you will see is the Document Window toolbar. Directly under that are the Thumbnail View and the Document Window.

When you select the thumbnail by clicking on it with your mouse it will have an orange highlight surrounding the thumbnail. Multiple Thumbnails can be selected at one time by holding down the shift key and selecting as many as desired. You can select all thumbnails by clicking the first one, scroll down to the last thumbnail, hold down the shift key and click the last thumbnail.

You can also pick specific pages by clicking on a thumbnail and then holding down the Ctrl key you can click on the thumbnails you wish to index, regardless of the order they appear in.

The toolbar functions are as follows:

- [ ] This will decrease the size of the image
- [ ] This will increase the size of the image
- [ ] This will display the image at its full size
- Pan Changes the mouse pointer to pan on drag
- Zoom Changes the mouse pointer to zoom in and out
- Changes the mouse pointer to zoom into the selection rectangle
- Crop Crop the image to the desired selection. When clicked it will change the mouse pointer into a plus sign +. When you click on the image, hold and drag it...
will make a selection rectangle. Once you have the selection you desire, un-click the mouse and it will create a new page out of the part of the image you cropped.

The crop feature is used when you need to separate parts of an image due to the fact that they belong to different persons and/or different document types.

For example: an image contains a doctor's slip confirming a pregnancy and portion of the image contains the person’s State ID. Using the Crop feature, you can select the pregnancy statement and it will create a brand new page. Next select the State ID and again it will create another new page. You will then need to delete the original page with the combined information. Now you'll be able to index the pregnancy statement as Medical and the State ID as Permanent Record.

Example of the selection window

Example of the new page created from using crop

Click **Delete** to delete the selected thumbnail(s)
After the indexer has selected the person and the page(s) they will be indexing the next step is to identify what type of document is contained within the selected pages. The portion to the right of the Document Window section is where the Document Type and Forward/Notify information is completed.

**Category** is automatically completed by the system based on what Document Type and Sub-Type is entered by the user. The different categories are:

- Assets
- Expenses
- Income
- Other
- Technical

*Prior Document Types* is not used for indexing but can be used when performing a Document Search and entering the Category pull-down list. Documents that were indexed prior to 6/3/2011 will be filed under this category.

Refer to the Job Aid at the end of this guide for the list of the different Document Types and Document Sub-Types.
**Case ID** - If there was a Case ID displayed for the person you selected that case number will display in this field. The number may be removed or it may be changed.

**Forward Circuit**
**Forward Work Group Type**
**Forward Group**

From the Indexing screen you can forward an indexed document to a non-error processing group. You can forward an unindexed document to an error processing group. To send an unindexed document to an error group outside your own circuit it must be done from the indexing screen. You must complete all three fields in order to send a document to a work group.

You can **Notify** a specific user regarding a document that is being indexed via the Indexing screen. This will send them an inbox message that is non-Work Group related (it is **not** a work group assignment).

The **Continue** button is used when you have identified the person with the page(s) and document type. Once the Continue button is clicked, all of the indexing information is added to the **Running List**. The indexer will continue indexing the document until they have identified all of the pages.

Each time a page or pages are indexed the information is sent to the Running List at the bottom of the screen.

If multiple pages are identified with the same person and same Document Type/Sub-Type, those pages will be listed together. If the user has indexed a page incorrectly they can click the **delete** icon and that will remove the index information for that page(s). If the user also has the option to Cancel out of the screen, which will cancel out any indexing that has been done on the screen thus far.

When the indexing information is for more than one household/case you will index all of the pages for that case and then use the Submit icon. Now complete the indexing for the next household/case and Submit. This should be done until the entire document has been submitted.
If the user is forwarding the document to a work group and/or sending a Notify Person they always have the option of adding messages that will be sent along with Forward/Notify. Click on the **Messages** icon and it will open the **Reindex Information-Message(s)** part of the indexing screen.

![Reindex Information-Message(s)](image)

The user may type in the text they wish to send along with the Work Group assignment or Notify Person. Click on **Add to list** to save the information. Any existing message will display at the very top of this section. It will display the Date the message was entered, **Updated On**. Who the message was **From** and what group or person to which it was sent. The **Type** is Forward, Notify or Forward/Notify. Then the **Message** is listed.

After a Work Group assignment has been indexed either through the index screen or by using the **Process** icon from the Work Group Search results screen (*labeled Document Search*) it will remove the inbox message/assignment.
Indexing staff

- How to become available and be assigned documents from the Work Group.
- How to check FLORIDA and identify status of case before indexing documents (pending, cert period ending).
- How to determine if documents need to be forwarded to other Work Groups (for example: Changes, Bill Tracking) for further action.
- How to identify applications and the process for forwarding these to the correct Customer Service Center for processing.
- How to delete unnecessary documents (blank pages, advertisements, duplicates).
- Need to make an attempt to call to get case number for documents that don’t have a case number but there’s a phone number.
- How to report documents that need to be corrected or need further research.
- Documents that cannot be located and need further research should be sent to the appropriate Error Reporting/Research Work Group.
- How to index documents to a person when there is a brand new case/Client Registration in FLORIDA (created same day).
- What to do with housing requests and the difference between a housing verification and a housing request.
- Importance of checking all pages of a document for identifying information.
- How to obtain the customer’s case number in AMS if they only provided their Access number.
- How to separate documents that include information for more than one customer.
- How to read the date/time of receipt on the image screen.
- Importance of protecting the date of receipt for all documents.
- Importance of processing all documents electronically and NO printing.
- Need to scroll down on the Document Search (called Work Group Search in this guide) and check for possible duplicates.
- When scanning need to ensure that File Mover is on and working properly, if any problems contact the Help Desk for assistance.
- Documents for pending cases need to be indexed to the person(s), no need to forward a document to a worker (Notify Person) since they should have a Courtesy Notification set.
- Document indexing time standards.
- Customers can view the date/type of scanned/faxed/uploaded documents that have been submitted to the Agency on their My Account.
- How to utilize MNOV and search for information when customers report birth of a baby and there is no other identifying information available.
- How to check if documents are for a pending case, recently denied case or submitted for an upcoming recertification application.
Supervisor Information

Supervisors who will be monitoring the indexing staff should be shown the following information:

- How to check the various reports in the Document Imaging system (Documents in Queue, Documents by Scanner, and Documents by Work Group).
- How to check the History of a document.
- How to look at all documents in a Work Group to see the date of the oldest document.
- Need to ensure that the indexing staff has a QUERY profile or IC [Interviewing Clerk] profile (if they will need to complete Client Registration) in FLORIDA as well as access to the AMS system.
- How to change Work Group users as needed by workload demands.
- How to monitor the indexing staff by using an indexing review sheet. Reviews must include deleted documents. Indexing supervisors should be sure they have access to view deleted status documents.
- How to handle documents placed in the Main Inbox incorrectly.

Suggested training materials

Document Imaging User Guide
FLORIDA Inquiry Screens list
FLORIDA Transactions Screens List
Document Type / Sub-Type Job Aid (found at the end of this guide)
MNOV instructions
Any Regional/Circuit procedural guides
## Document Type Security by Profile

http://eww.dcf.state.fl.us/~ess/modern/profiles_usergroups_chart.pdf

<table>
<thead>
<tr>
<th>User Group/Profile</th>
<th>View Deleted</th>
<th>Benefit Recovery</th>
<th>BPP Confidential</th>
<th>Child in Care (CIC)</th>
<th>Confidential AIP</th>
<th>Confidential DDO</th>
<th>Confidential Employee</th>
<th>Hearings</th>
<th>Institutional Care Program (ICP)</th>
<th>Notices</th>
<th>OSH Records</th>
<th>OSS Documents</th>
<th>Quality Control</th>
<th>Relative Caregiver</th>
</tr>
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<tbody>
<tr>
<td>Admin*</td>
<td>Yes</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td>X</td>
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<tr>
<td>Confidential AIP</td>
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<td>X</td>
<td>X</td>
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<tr>
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* Assigned only by Headquarters Admin Staff  # Confidential Supervisor was created to allow Supervisors in C11 to view Deleted documents (p60)
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* Assigned only by Headquarters Admin staff      # Confidential Supervisor was created to allow Supervisors to C11 to view Deleted documents (pilots)
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<th>User Group/Profile</th>
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<td>BRP – Benefit Recovery Worker</td>
<td>No</td>
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<td>BRP Sup – Benefit Recovery Supervisor</td>
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<td>ESS Admin – Person in charge of service center (POA, CPA, OMCID)</td>
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<td>Confidential DDD - SSA/DDD staff</td>
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<td>Confidential Supervisor - profile created to allow Supervisors to view deleted status documents</td>
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<td>ESS CIC Supervisor - Child in Care Supervisor</td>
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<td>ESS Confidential Medical - staff that access Confidential Medical documents</td>
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<td>ESS Worker – Regular ESS worker</td>
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<td>Medical Only - AHCA staff</td>
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<td>OSII Staff - Office of Appeal Hearings</td>
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<td>Security - Region Security Officers</td>
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"Supervisor" is given to profiles that need access to the Work Group Users. Viewing reports is determined by the user's profile. They are None, State and Region. **Region** allows reports for only the user's own Region. **State** allows for reports to be run from any Region.
### Document Type / Sub-Type Job Aid

<table>
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<th>Category</th>
<th>Document Type</th>
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<tr>
<td>Assets</td>
<td>Asset Verification</td>
<td>Asset Verification</td>
<td>Bank Account/Investment Statement, Trusts, Credit Card Bills, Life Insurance Policies/documents, Property documentation such as Rental Property, Personal Property, Sales Listings. Burial Contract, Cemetery Lot, Vehicle documentation such as Dealer Statement, Title, Registration</td>
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<td>Expenses</td>
<td>Daycare/Shelter/Utility</td>
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<td>Childcare/Tuition/Daycare receipts, Child support paid outside the household, Adult Care expenses, Lease, Rent Receipt, Mortgage Statement, Electric Bill, Gas Bill, Phone Bill, Shelter Assistance</td>
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<td>Hospital Bill, Pharmacy Bill, Doctor Bill</td>
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<td>Documents containing sensitive medical information, such as HIV status, mental conditions, terminal illness.</td>
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<td>Protective Payee Agreement, Guardianship Papers, Adoption Records, Marriage and Divorce Documents, Divorce Papers/Decree, Separation Papers, Marriage License/Certificate, Financial Information Release Form, Appointment of a Designated Representative, Authorized Representative, Power of Attorney,</td>
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Document Imaging User Guide
Last Updated 11/17/2011
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*The Document Type Institutional Care Program (ICP) would include: Nursing Home Facility, Adult Living Assistance, CARES and Hospice*

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*This Document Type is only used by OSIH staff.*

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