

Send an Outbound Fax


This wizard covers how to fax correspondence and notices in IES.

Process Steps:

Faxing a document through Correspondence Fax...


1. From **Left Navigation**, select **Correspondence**, and then select **Correspondence Fax**.

- The **Fax Correspondence-Details** page displays.

	Workers can also send a fax through the Generate Manual page. Follow the steps in the Generate Manual Correspondence wizard and click [Fax] on the Additional Info page. The pop-up page displays and the worker can complete steps 2-3 in this wizard.
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2. In the **Manual Fax** section of the page, complete the following fields:

- Click **[Browse]** to upload the file you want to send to the customer.

	You can only upload one file for each fax. The file must be in PDF format.
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- Enter the recipient's name next to **To** (required)
- Enter the recipient's fax number next to **To Fax #** (required)
- Enter the sender's name next to **From** (required)
- Enter the sender's fax number next to **From Fax #** (required)
- Enter the Message subject next to **RE** (required)
- Enter a brief message next to **Message** (required)

3. Click **[Submit]**.

Results of the Procedure:

The document will be faxed to the customer.

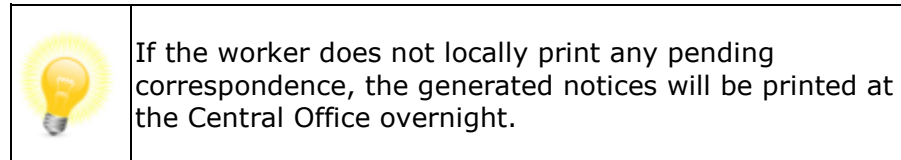
[PRINT](#)

Print Pending Correspondence

Use this Wizard to print pending correspondence documents locally. Unprinted correspondence shows as pending for the batch job that runs nightly. The pending correspondence includes systematically triggered notices, manually generated notices for central print or manually generated notices that are saved as a draft.

Process Steps:

1. Review the [View Pending Correspondence](#) Wizard to follow the steps to view a list of pending correspondence for the case, application or appeal.
2. In the **Search Results** section of the **View Pending Correspondence** page, select the hyperlink of the name of the document you want to print.
 - The **Pending Correspondence Detail** page displays.
3. Click [**Local Print**] to print the document in the office.
 - A PDF of the correspondence displays for printing



Results of the Procedure:

The document was printed locally and now displays on the **View History Correspondence** page.


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View Correspondence History


Use this Wizard to view correspondence history for a case. The **View Correspondence History** page is used to see the name and date for all of the documents that have been printed and mailed to a customer.

Process Steps:


1. From **Left Navigation**, select **Correspondence**, then select **View History**.
 - The **View History Correspondence** page displays.
2. In the **Search Criteria** section, enter one or more of the following search criteria:
 - **Case/Application #**
 - **Appeal #**

	You must search by either Case/Application # or Appeal # . You cannot search by both.
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- **Investigator Case #**
 - **Print Begin Date**
 - **Print End Date**
 - **Print Mode**
 - **Document Task/Title**
3. Click [**Search**].
 - The search results display in the **Search Results** section of the page.
 4. Review the search results:
 - **Issued to:** Displays the name of the recipient to whom the notice was addressed
 - **Document Description:** Displays the document's name
 - **Print Date:** Displays the date the notice was printed
 - **Print Type:** Displays whether the document was an *Original* or a *Reprint*
 - **Print Mode:** Displays Local or Central Print.

	Workers can also view historical correspondence on the Case – Search/Summary page by clicking the CH (Correspondence History) icon.
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5. Click the radio button next to the name of the document you want to review.
6. Click **[Next]**.
 - The **History Correspondence Detail** page displays.
7. Review the **History Correspondence** section of the page:
 - **Issued To:** Name of the recipient to whom the notice was addressed
 - **Document Description:** Displays the documents that have been printed based on the search criteria
 - **Print Date:** Displays the date the notice was printed
 - **Print Type:** Displays whether the document was an Original or a Reprint
 - **Print Mode:** Displays Local or Central Print. For Pending Correspondence, this will default to Central Print

	The History Correspondence Detail page allows workers to: View the document, Central Reprint, or Local Reprint
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8. Click **[Previous]** to navigate back to the **View History Correspondence** page.

	When you click [Previous] to go back to the View History Correspondence page, the search results stay on the page.
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Results of the Procedure:

Workers are able to see documents that have been sent to a customer and the date they were sent.


PRINT

Reprint Correspondence History


Use this Wizard to reprint correspondence previously sent to a customer.

Process Steps:

1. Review the [View Correspondence History](#) wizard to follow the steps to search for correspondence history on a case.
2. In the **Search Results** section of the **View History Correspondence** page, select the radio button next to the document you want to reprint.
 - The **History Correspondence Detail** page displays.

	<p>The History Correspondence Details page displays the Print Mode and Print Type, Date of Request, User ID (state employee who printed document) and Case or Application Number and Name of Recipient.</p> <p>The page also allows you to View the document, Central Reprint, or Local Reprint, and return to [Previous] page.</p>
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3. To reprint the document:
 - Click **[Local Reprint]** to reprint the correspondence in the office.
 - Click **[Central Reprint]** to reprint the correspondence during the nightly batch job.

	<p>If you click [Central Print] the correspondence document appears on the View Pending Correspondence page.</p>
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4. The **View History Correspondence** page displays with an "*Update Successful*" message at the top of the page.

Results of the Procedure:


Workers reprinted the document that previously had been printed and mailed to customers.

PRINT


Generate Manual Correspondence


Use this Wizard to generate a manual correspondence in IES. Once created, the correspondence can be printed or faxed through IES.

Process Steps:

	Refer to the Correspondence Job Aid to identify which notices are systematically triggered and which notices are manually generated.
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1. From **Left Navigation**, select **Correspondence**, and then select **Generate Manual**.
 - The **Search Case Information** page displays.
2. In the **Search Criteria** section:
 - Enter the **Case/Application #** or;
 - Enter the **Appeal #**.
3. Click **[Search]**.
 - The **Search Results** display at the bottom of the page with the **Individual Name(s)** and the **Program(s)** requested.
4. Select the checkbox next to the EDG for whom you want to generate the notice.
5. Click **[Next]**.
 - The **Search Document Information** page displays.
6. Type the document number or the name of the document in the **Document Name** field.
7. Click **[Search]**.
 - A hyperlink to the requested document displays in the **Search Results** section of the page.
8. Select the hyperlink of the document to generate.
9. The **Additional Info** page displays.
 - Complete the fields for any additional information needed on the page.

	Click the [Save Draft] button to save the document as a draft if additional research is needed for the case. The draft is saved as a pending correspondence on the View Pending Correspondence page.
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	If a form does not require additional information, you will see this message: <i>This document/notice does not require any additional information</i> displays on the Additional Info page.
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10. To Print or Fax the document:

- Click **[Local Print]** to print locally if the customer is in the office.
- Click **[Central Print]** to print centrally.

	If workers click [Central Print] , the document is saved as a <i>Pending Correspondence</i> waiting to be printed in the nightly batch job.
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- Click **[Fax]** to fax the document. Refer to the [Send an Outbound Fax](#) wizard for additional details.

Results of the Procedure:

Specific correspondence documents are selected by the user and manually filled-in with information pertaining the to case and/or clients through IES. The documents are previewed, and printed locally, centrally or faxed, as appropriate.

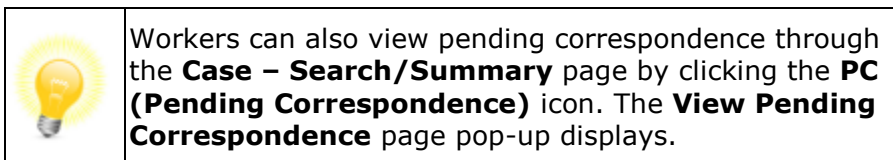
PRINT

View Pending Correspondence

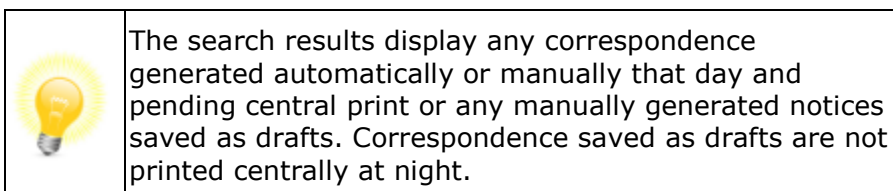
Use this Wizard to view pending correspondence through the Correspondence module. The **View Pending Correspondence** page is used to search for and view any correspondence that is saved as a draft or waiting to be printed centrally by IES, in the nightly batch job.

Process Steps:

1. From **Left Navigation**, select **Correspondence**, then select **View Pending**.
 - The **View Pending Correspondence** page displays.
2. Enter the **Case/Application #**
3. Click **[Search]**.
 - The **Search Results** display all pending correspondence for that day.





4. Review the **Search Results** section:
 - **Document Description:** Displays the name of the documents scheduled for printing
 - **Request Date:** Displays the date the notice was generated.



5. Click the document name hyperlink to view the correspondence details for that document.
 - The **Pending Correspondence Detail** page displays.
6. Review the **Search Results** section:
 - **Document Description:** Displays the name of the documents scheduled for printing
 - **Request Date:** Displays the date the notice was generated.
7. Review the **Pending Correspondence Detail** section:

- **ID Type:** Displays the type of case, application, appeal or investigator case the document was created for
- **Case or Application#, Appeal# or Investigator Case#:** Displays the case, application, appeal or investigator case number
- **Print Mode:** Displays the way the correspondence was printed either centrally, locally or faxed
- **Recipients:** Displays the customer's name who will receive the notice
- **Date Requested:** Displays the date the notice was generated
- **User ID:** Displays the User ID that triggered the notice
- **Print Type:** Displays if the correspondence is original or a reprint

	If needed, LOAs can delete pending correspondence.
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	A worker can print pending correspondence locally from the Pending Correspondence Detail page and then the document appears on the View History Correspondence page.
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Results of the Procedure:

View the pending correspondence documents that will print in the nightly batch run and print locally, if needed.

[PRINT](#)