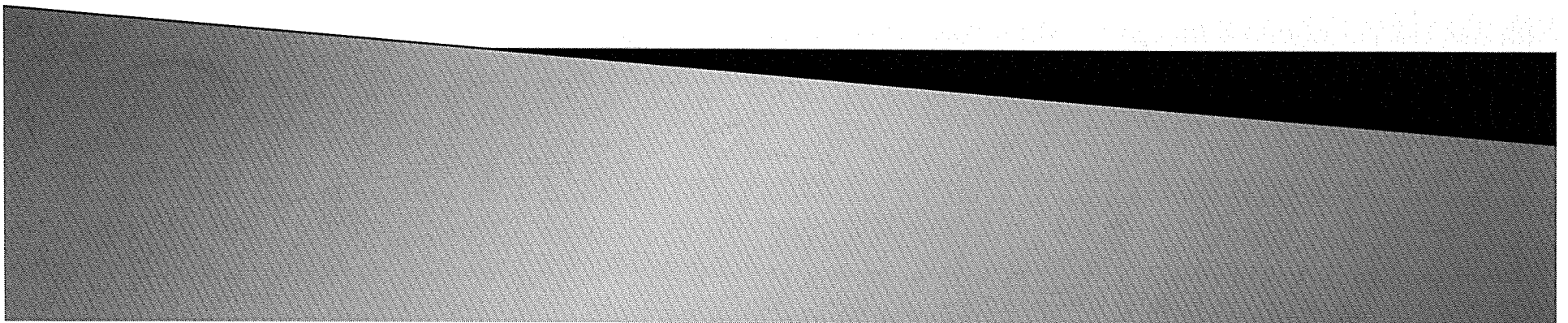
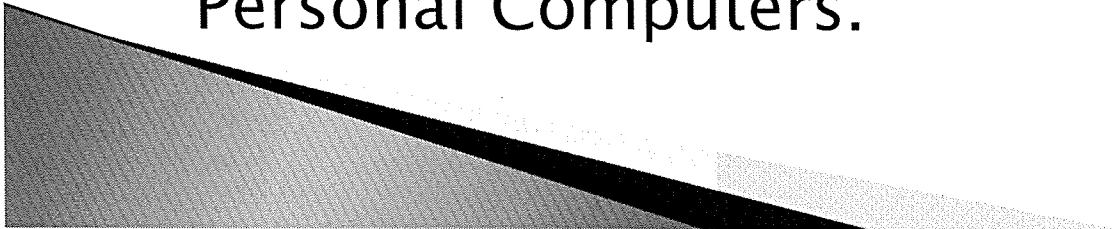


IES Network Scanning

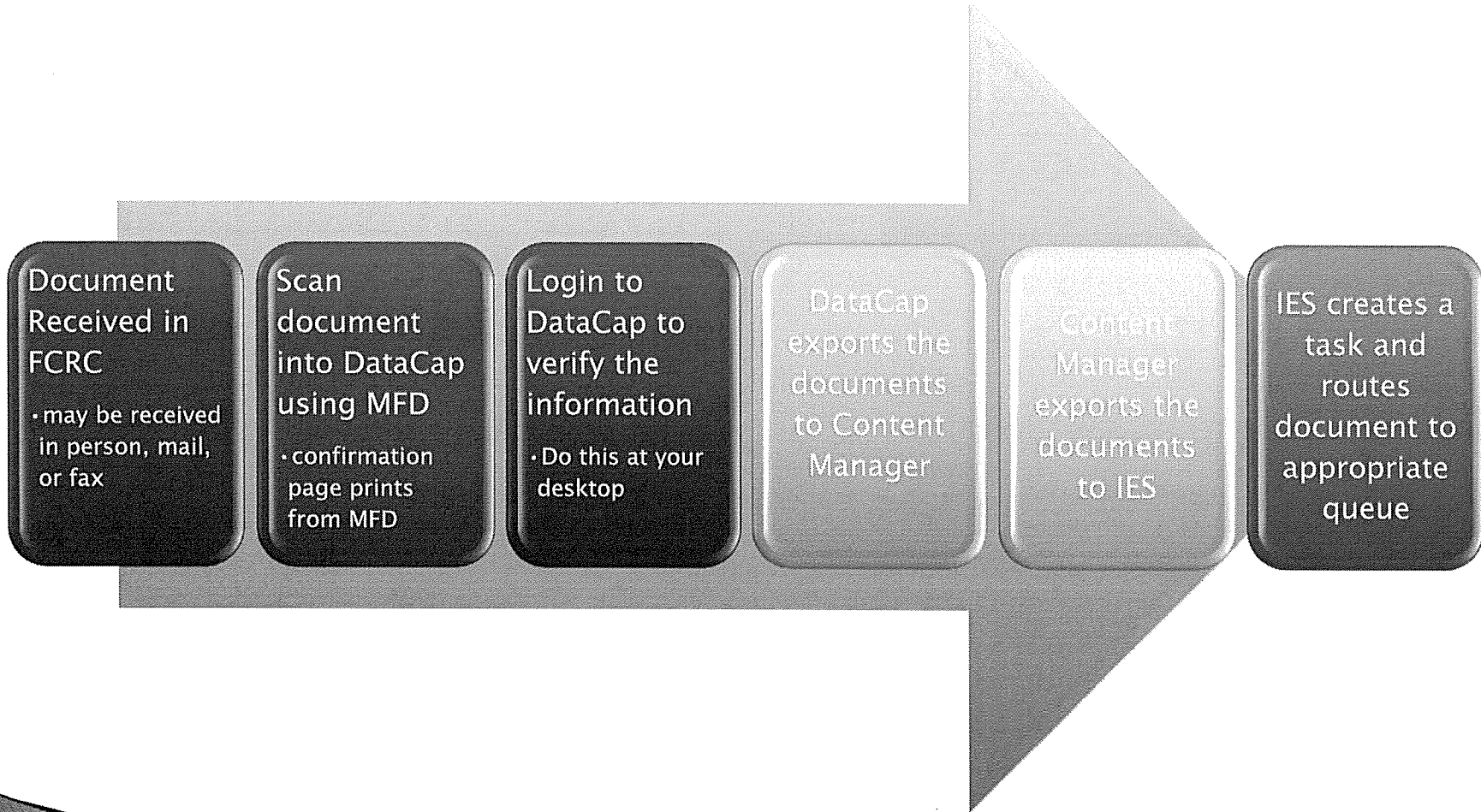
Electronic Routing of Forms and Documents in IES



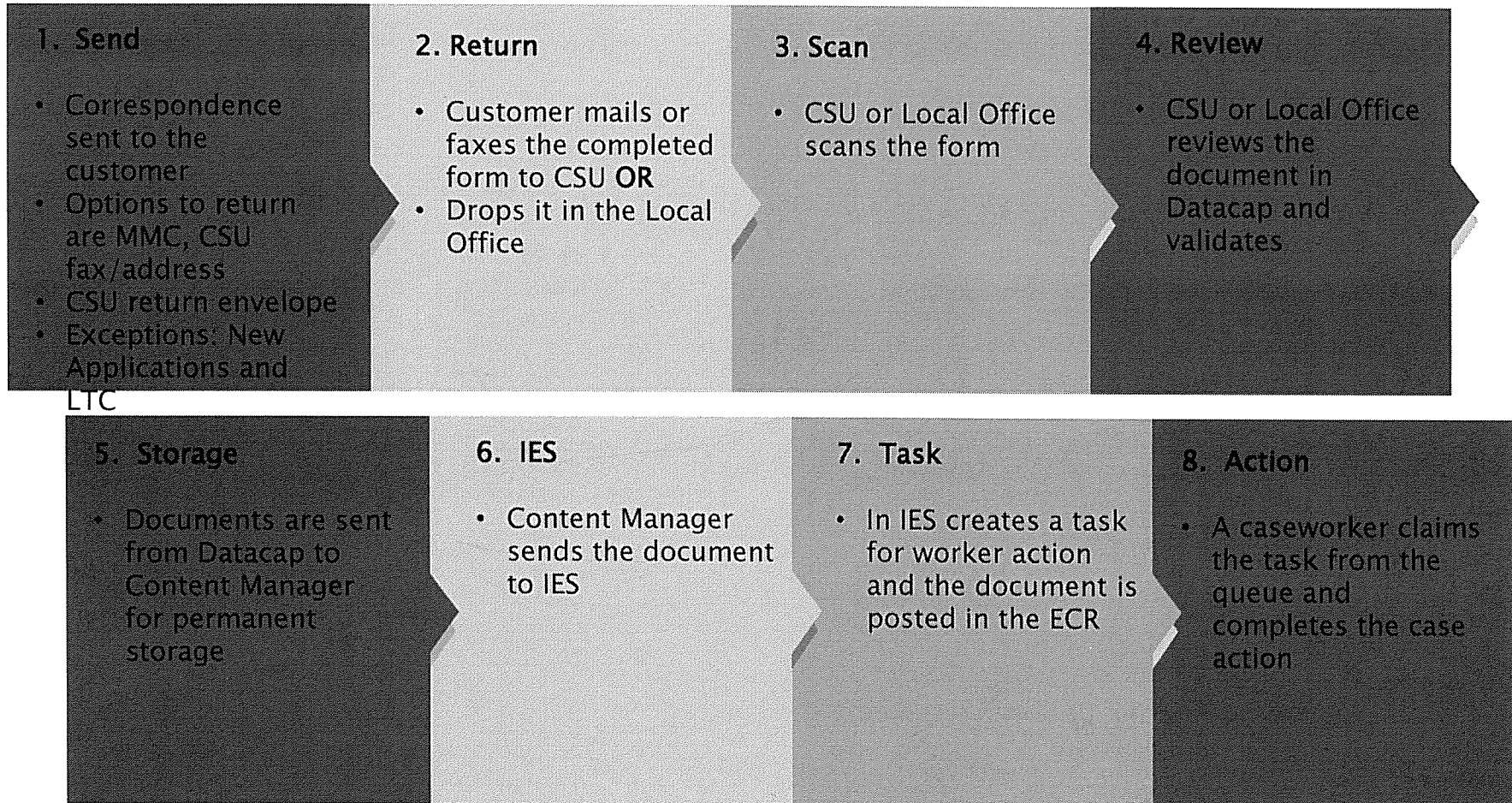
Overview of the Network Scanning Initiative

- ▶ We are deploying a new third-party scanning software called **DataCap** which will interface with IES.
 - ▶ DataCap will be loaded on each person's PC.
 - ▶ DataCap will read **barcodes** on state forms and notices to identify case numbers and type of form.
 - ▶ DataCap will interface with IES to determine case status and will **automatically create and route EDM inbox tasks** base on the information gathered.
 - ▶ This training explains how staff use DataCap software loaded on MFDs (Xerox machines) and Personal Computers.
- 

Scanning Overview

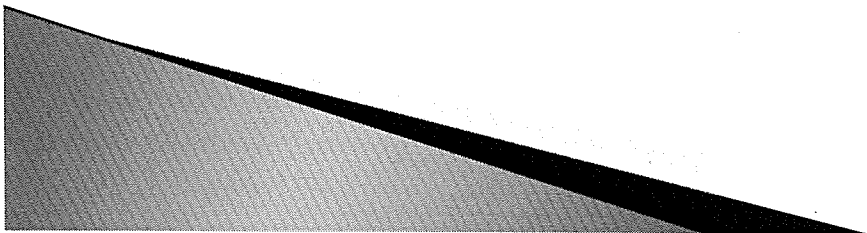


The Role of Scanning in Progressing a Case



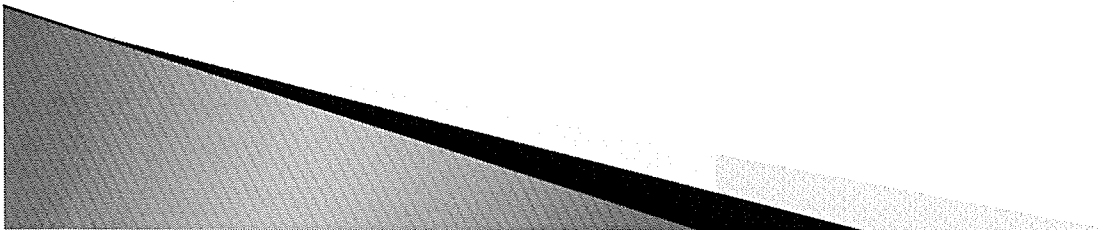
Scanning Overview

1. Documents needing to be scanned at local office can be scanned to the Network Drive or DataCap. Scanners (MFDs) are programmed to enable this option.
2. Scans from the same case are scanned into a batch, so that each batch may represent several documents for the same case.
3. Once scanned, each document in the batch must be verified and correctly named via the DataCap software.
4. DataCap may require scanned batches to be “fixed” if DataCap cannot verify the document.
5. Verified and corrected documents will be uploaded to correct IES queue by DataCap.



Newly Barcoded Forms

- ▶ There are two kinds of forms utilized:
 - **IES Generated Forms** – forms either systematically or manually generated for a case from IES located in the Correspondence section. Often, these are notices that would automatically be generated by the system.
 - **State Library Forms** – forms that are available in the DHS or HFS forms library. These forms can either be typed or manually completed.



IES Generated Forms

- ▶ An IES form is generated and stored in the correspondence section of IES for a particular case.
- ▶ It will auto-populate with data that is found within the case, e.g., the local office, date, case number and case name.

State of Illinois
Department of Human Services

VERIFICATION OF SCHOOL ATTENDANCE

TO: _____ CASE NO. 203851362

FROM: _____ CASE NAME JACQUELINE MORRIS

DATE: April 26, 2015

From: **NORTHERN FCRC**
8020 ST. LOUIS AVE.
SKOKIE, IL 60076
847-745-5200

OFFICE STAMP

INSTRUCTIONS FOR COMPLETION OF THE FORM

TO THE CASEWORKER/REQUESTOR: Complete all applicable sections with all information available for the case needing verification except student status and expected date of graduation for children 18 years of age.

TO THE SCHOOL: The Department of Human Services is required to verify the school attendance of recipients and applicants who are 18 years of age. The Department must also verify that children of any age are living with the person who applied for or is receiving assistance for the children. Please complete those items in each section for which you have verification. Those items which are incorrect or misspelled are to be lined through and the correct information entered.

NAME OF STUDENT	BIRTH DATE	GRADE IN SCHOOL	Is Age 18 or Over? Yes or No	STATE OF RESIDENCE, FEDERAL AND RELATIONSHIP TO STUDENT	ADDRESS OF RESIDENT	STUDENT STATUS (Full Time or Part Time)
				X	1549 JONQUIL CHICAGO	

SIGNATURE OF AUTHORIZED SCHOOL OFFICIAL _____ DATE _____ SCHOOL STAMP _____

IL 444-0541 (R-07-15) Verification of School Attendance Page 1 of 1

State Library Forms

- ▶ Library forms are in an editable Adobe pdf and the user can either print and fill out by hand or type information onto the document.
- ▶ The barcodes on library forms are dynamic, and will change if information is typed into the form.
- ▶ The barcodes contain information as to the kind of form it is and are key in routing the form to the right office, the right case, and the right queue.
- ▶ It is essential to use the new Library Forms so they can be routed and stored to the case ECR and tasks created in the correct queues.
- ▶ Only use State Library forms if there are no available IES forms. State Library forms will not be stored in the Case correspondence history.

State of Illinois
Department of Healthcare and Family Services

**Health Insurance
Premium Payment (HIPP) Referral**

Date of Notice: 04/07/16
Case Number: 604983436

First Name: Kuang
Last Name: Huang
Address 1: 1270 E. Golf Rd.
Address 2:
City: Des Plaines
State: IL ZIP: 60016

Office Name: Northern F.A.C.
City, State, ZIP:
Phone:
TTY:
Fax:

IF YOU HAVE A HIGH COST MEDICAL CONDITION AND GROUP HEALTH INSURANCE AVAILABLE TO YOU YOU ARE REQUIRED TO COMPLETE THIS FORM TO BE ELIGIBLE FOR MEDICAL ASSISTANCE

1. Name of the person with the high cost medical condition: _____
The high cost medical condition is: _____

2. Name of person who has (or can) enroll in the health plan _____
Address: _____
SSN: [] [] [] [] [] [] [] [] Telephone # _____

3. If the person listed in #2 above is not requesting or receiving medical assistance and would be agreeable to enroll the person listed in #1, check here

If possible, ask the person listed in #2 to sign and date the authorization below:

I authorize HFS to obtain, as needed, any information regarding my health insurance coverage which may be used to determine if HFS will pay part or all of my insurance premium.

Signature: _____ Date: _____

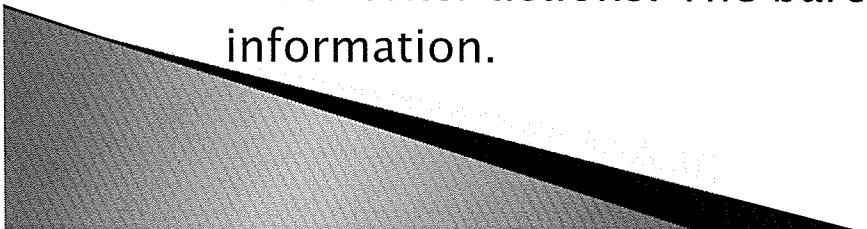
4. Is available health insurance a group through (check one) current employer former employer
 union or group (local #) _____ other group _____

Name and address of current/former employer, union or group _____ Telephone # _____
 an individual policy

Name and address of insurance agent _____ Telephone # _____

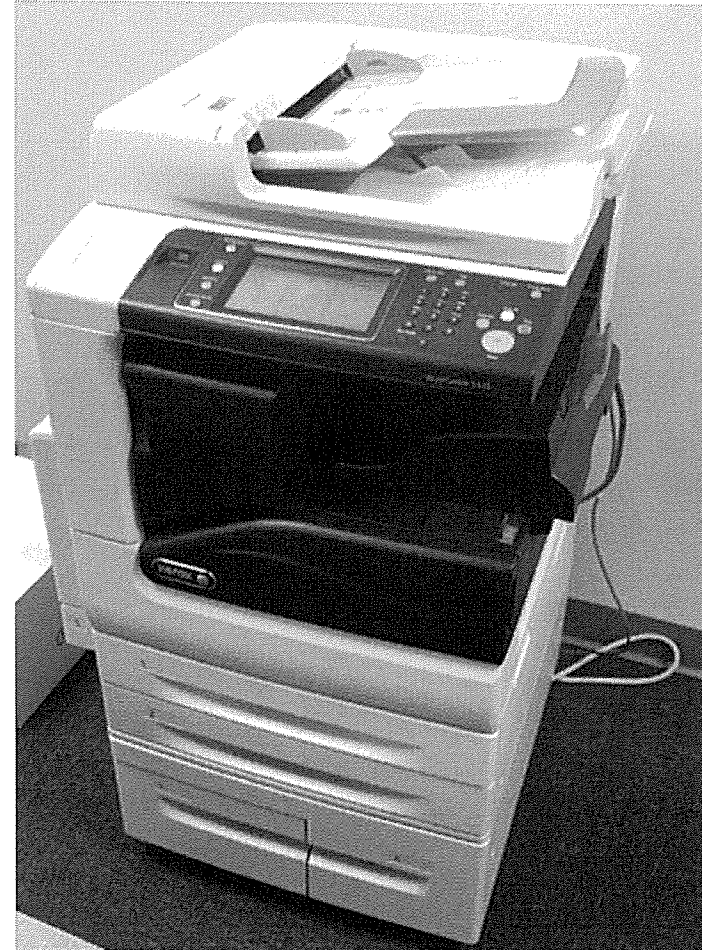
HFS 34595 (R 6-1113) Health Insurance Premium Payment (HIPP) Referral Page 1 of 2

Scanning and IES Processing Steps

1. Your office receives a document in person, mail or fax.
 2. Using the MFD (multifunction device) – otherwise known as the Xerox workstations – scan the form into DataCap.
 3. Scan documents belonging to one case per one batch.
 4. Once scanning is completed, a confirmation page will print out. You will use this to match the ImageID on the confirmation page to the ImageID in the DataCap screen.
 5. Log into DataCap to verify the information.
 6. Once verified, DataCap will export the form to Content Manager.
 7. Content Manager will export to IES and using the barcoded data and data entered in DataCap, will create a task in the correct queue for caseworker actions. The barcode does not contain any personal information.
- 

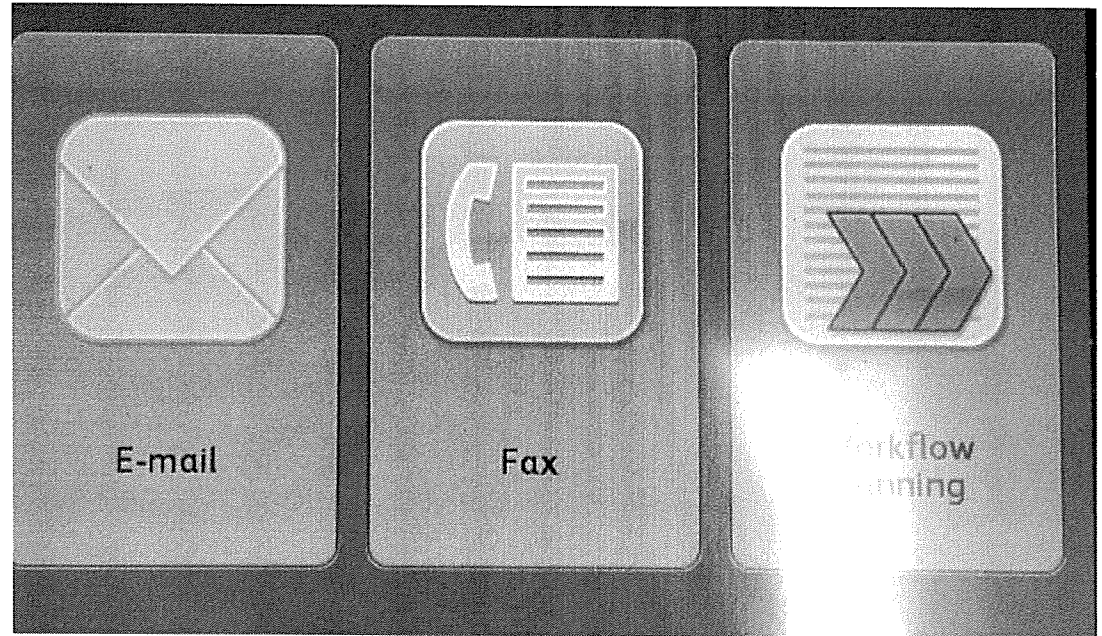
Using the MFD

1. The Xerox workstations (MFDs) are configured to be able to scan the new barcoded forms into DataCap.



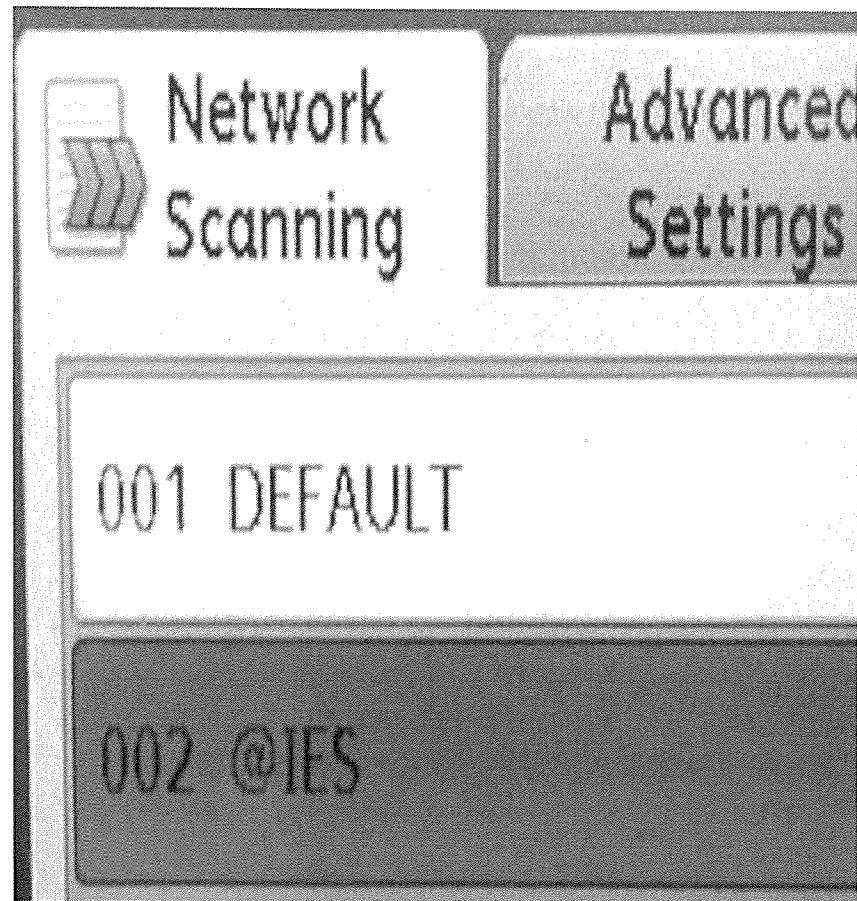
Using the MFD (cont.)

2. On the workstation display screen, select the Network Scanning option.



Using the MFD (cont.)

3. Select 001 Default option to scan the form manually into the Network Folder.
4. Select 002 @IES option to scan the form into DataCap software.
5. Set the form(s) in the feeder tray and press the start button to initiate the scan.



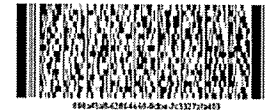
Received Date Batch Cover Sheet

- ▶ By default, DataCap will set the received date of the document to the same date it was scanned.
- ▶ When document cannot be scanned on the same day as the document received date:
 1. Download the Received Date Batch Cover Sheet pdf
 2. Open it in Adobe Reader.
 3. Type the actual document(s) received date for DataCap to use.
 4. Print the coversheet.
 5. Place coversheet as the 1st page before any documents for which you will need to override the received date.
- ▶ When DataCap encounters the Received Date Batch Coversheet, it will set the received date to that entered on the coversheet for all documents that follow until the end of the batch. The Received Date Coversheet can be reused as many times as is appropriate since it is not case specific.

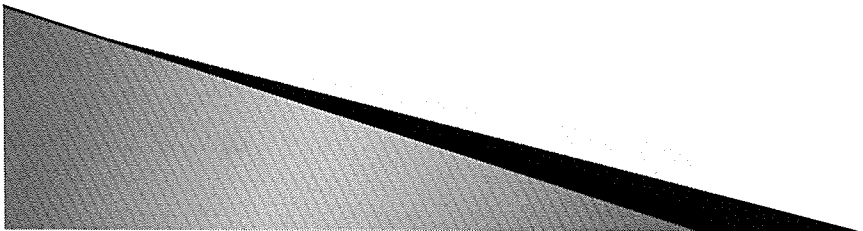


Received Date Batch Cover Sheet

Use this batch cover sheet to set the Received Date for all forms scanned in this batch. The Received Date for all documents in this batch will be set to the date entered below.



Received Date



Logging into DataCap on your Computer Desktop

The screenshot shows the IBM Datacap login interface. At the top, there are navigation tabs for 'Home' and 'Operations', and links for 'Help' and 'Log out'. The main heading is 'Login • IE Test Page'. A central 'Login' dialog box prompts the user to enter their information. The fields are: 'Application' (a dropdown menu set to 'IES'), 'User ID' (text input with 'illinois.gov ID'), 'Password' (text input with masked characters), and 'Station' (text input with 'your local office'). Below the fields is a note about automatic sign-out and two buttons: 'Login' and 'Cancel'. The IBM logo is in the bottom left. Three callout boxes provide instructions: one points to the 'Application' dropdown, another to the 'User ID' and 'Password' fields, and a third to the 'Station' field.

IBM Datacap Home Operations Help | Log out IBM

Login • IE Test Page

Login

Please enter your information

Application IES

User ID illinois.gov ID

Password

Station your local office

Please note, after a period of inactivity, the system will automatically sign you out and ask you to sign in again.

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Copyright © 1994, 2014 IBM Corporation.

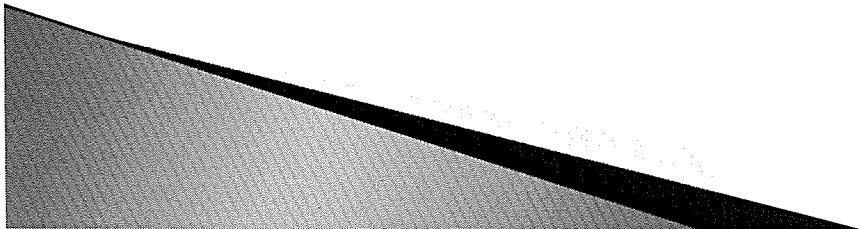
The Application Field should default to IES

Use your illinois.gov User ID and Password

Station will default to your local office name

Job Type

Name	Description
File Job	Import images from your local computer into Datacap
Folder Job	Import images that were scanned at MFD and stored to network file folder
Email Job	Import images received from Datacap email inboxes
Fax Job	Import images received from Datacap fax numbers



Task Options

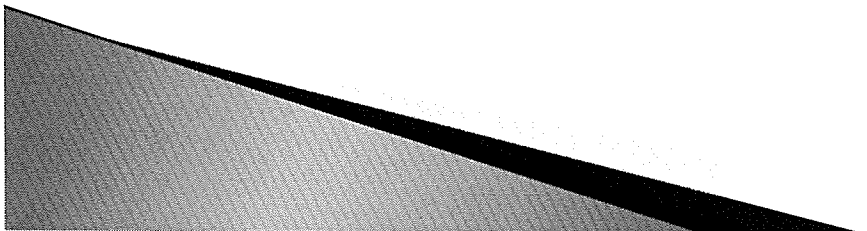
- ▶ Each job is comprised of tasks. The tasks listed below correspond to the seven basic steps of scanning.

Application Step	Task Name
Page input	FileFolder, ScanFolder, EmailScan, FaxScan
Page identification	PrePageID, PageID, ManualPageID
Document assembly	Profiler, DocIntegrityFixup
Data recognition	Profiler
Data validation	Profiler
Data verification	Verify
Data export	PreExport, Export, ExportCM

Operation Status

- ▶ The Status column shows the status of the current operation.

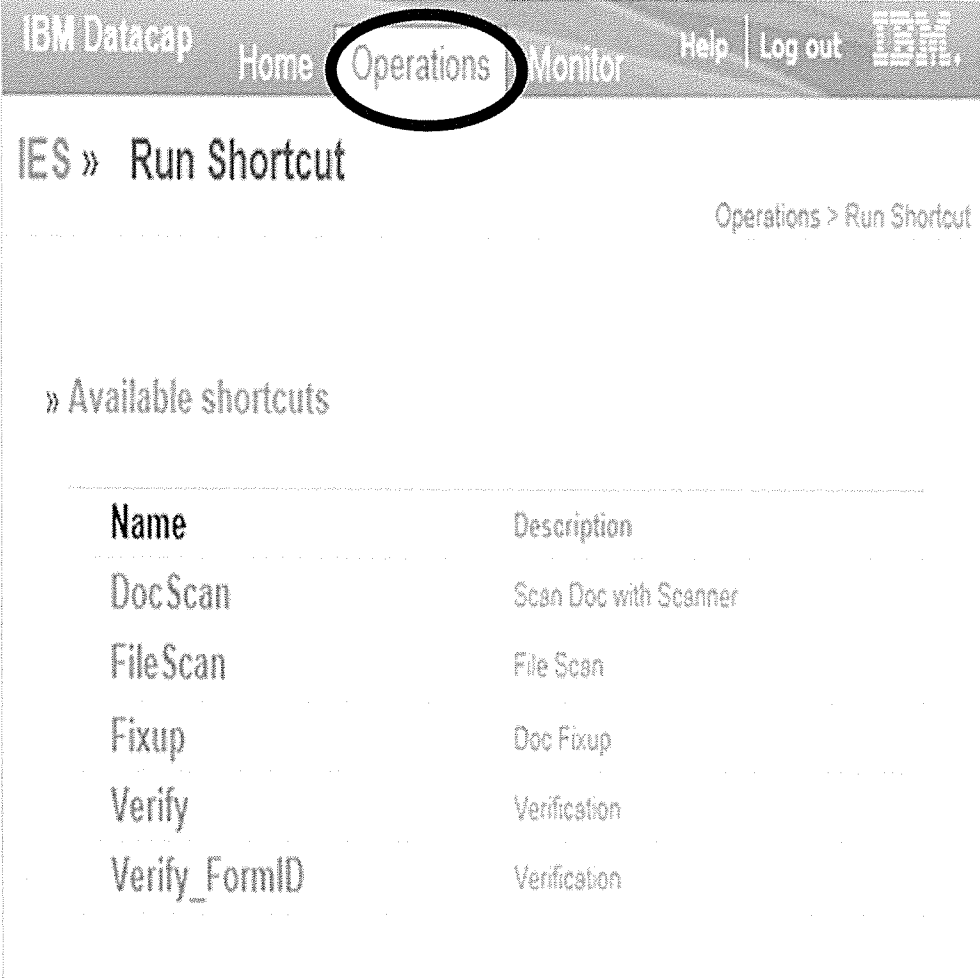
Name	Description
Pending	Waiting to execute
Running	Task is executing currently
Done	Task has completed successfully
Aborted	Task has completed unsuccessfully, error information is in the log files



Using DataCap

The Operations Page

- ▶ Once you log into DataCap, the first screen that you see is the Operations page.
- ▶ This page shows the tasks that DataCap can perform when a document is scanned.
- ▶ All of these tasks won't be done for every document scanned – but they are available options that can be selected.
- ▶ You can choose any of the available task type shortcuts or you can choose the Monitor tab on the top to enable you to see all the scanned documents and their current task status on the Job Monitor Page.



IBM DataCap Home **Operations** Monitor Help Log out

IES » Run Shortcut

Operations > Run Shortcut

» Available shortcuts

Name	Description
DocScan	Scan Doc with Scanner
FileScan	File Scan
Fixup	Doc Fixup
Verify	Verification
Verify_FormID	Verification

Using DataCap The Job Monitor Page

- ▶ The Job Monitor page allows you to see all the documents scanned in one batch and which task step they are in.

Job ID	Batch	Job	Task	Status	Job start	Job time	Task start	Operator	Docs	Pages	ImageID	StationID	OfficeID
3727	20160627000013	Folder Job	Verify_FamiD	pending	2016-06-27 10:05:10	0	2016-06-27 10:43:16		4	6	20160627000027	Folder	20
3726	20160627000012	Folder Job	Verify	pending	2016-06-27 10:04:55	0	2016-06-27 10:43:04		6	6	20160627000014	Folder	20
3725	20160627000011	Folder Job	ExportCM	job done	2016-06-27 10:04:39	0	2016-06-27 10:29:14	IESQARJh3	2	2	20160627000003	Folder	20
3724	20160627000010	Folder Job	Verify_FamiD	hold	2016-06-27 10:03:56	0	2016-06-27 10:50:32	rene.camus	2	2	20160627000018	Folder	20
3723	20160627000009	Folder Job	DocCap	pending	2016-06-27 10:03:53	0	2016-06-27 10:02:23		0	3	20160627000046	Folder	20
3722	20160627000008	Folder Job	Verify_FamiD	running	2016-06-27 10:03:46	0	2016-06-27 10:43:53	ghdythansen-guest	1	1	20160627000030	Folder	20
3721	20160627000007	Folder Job	ExportCM	job done	2016-06-27 09:59:52	0	2016-06-27 10:43:38	IESQARJh2	1	1	20160627000037	Folder	20
3719	20160627000006	Folder Job	ExportCM	job done	2016-06-27 09:58:39	0	2016-06-27 10:46:32	IESQARJh2	1	1	20160627000075	Folder	20
3718	20160627000005	Folder Job	ExportCM	job done	2016-06-27 09:46:12	0	2016-06-27 09:08:56	IESQARJh4	1	1	20160627000051	Folder	20
3718	20160627000004	Folder Job	ExportCM	job done	2016-06-27 09:45:33	0	2016-06-27 09:06:07	IESQARJh2	1	1	20160627000041	Folder	20
3717	20160627000003	Folder Job	ExportCM	job done	2016-06-27 09:44:55	0	2016-06-27 09:02:04	IESQARJh1	1	1	20160627000034	Folder	20
3716	20160627000002	Folder Job	ExportCM	job done	2016-06-27 09:43:02	0	2016-06-27 08:59:15	IESQARJh3	1	1	20160627000036	Folder	20
3715	20160627000001	Folder Job	ExportCM	job done	2016-06-27 09:43:04	0	2016-06-27 08:56:56	IESQARJh1	1	1	20160627000043	Folder	20
3714	20160627000000	Folder Job	ExportCM	job done	2016-06-27 09:42:13	0	2016-06-27 08:54:43	IESQARJh1	1	2	20160627000003	Folder	20
3713	20160626000000	Folder Job	ExportCM	job done	2016-06-27 09:41:21	0	2016-06-27 08:51:01	IESQARJh3	1	1	20160627000005	Folder	20

Using DataCap

The Job Monitor Page (cont.)

- ▶ Refresh rate should be set to 10 sec (1).
- ▶ Office ID should be selected to filter for only your office (2). The #'s in the filter will correspond to your office #.
- ▶ Most of these columns allow you to filter for what you need (further explanation in the following pages)
- ▶ The viewable columns can be changed to your preference by clicking on the show column selection buttons at the bottom of the screen (3).
- ▶ As good practice, the following columns should be viewable: QID(4), Batch ID(5), Job(6), Task(7), Status(8), Operator(9), Docs(10), Pages(11), Image ID(12) and Office ID(2).
- ▶ The page numbers on the bottom of the screen allow you to go between pages(14).

The screenshot shows the 'Job Monitor' page in the IES DataCap application. The page title is 'Job Monitor' and it includes a navigation bar with 'Home', 'Operators', and 'Monitor'. The main content area displays a table of job entries with columns for QID, Batch, Job, Task, Status, Operator, Docs, Pages, Image ID, and Office ID. The table is currently showing 10 items per page, and the refresh rate is set to 10 seconds. The page number 14 is visible at the bottom, along with a 'Show columns' button and a list of available columns for selection.

QID	Batch	Job	Task	Status	Operator	Docs	Pages	Image ID	Office ID
12007	20150012 000003	Folder Job	FolderScan	pending	IESQARule1	0	0		
12006	20150012 000002	Folder Job	Verify	pending		1	1	20150012152611	20
12005	20150012 000001	Folder Job	DirFmap	pending		0	1	20150012152606	20
12004	20150012 000000	Folder Job	Verify	pending		1	1	20150012152556	20
12003	20150011 000040	Folder Job	Verify	pending		1	1	20150012152549	20
12002	20150011 000039	Folder Job	ExportCM	Job done	IESQARule2	1	1	00000020	99
12001	20150011 000038	Folder Job	ExportCM	Job done	IESQARule4	1	1	00000022	99
12000	20150011 000037	Folder Job	ExportCM	Job done	IESQARule3	1	1	00000021	99
12019	20150011 000036	Folder Job	ExportCM	Job done	IESQARule4	1	1	00000020	99
12018	20150011 000035	Folder Job	ExportCM	Job done	IESQARule2	1	1	00000019	99
12017	20150011 000034	Folder Job	ExportCM	Job done	IESQARule2	1	1	00000018	99
12016	20150011 000033	Folder Job	ExportCM	Job done	IESQARule4	1	1	00000017	99
12015	20150011 000032	Folder Job	ExportCM	Job done	IESQARule2	1	1	00000016	99
12014	20150011 000031	Folder Job	ExportCM	Job done	IESQARule4	1	1	00000015	99
12013	20150011 000030	Folder Job	ExportCM	Job done	IESQARule2	1	2	00000014	99

Page 14 of 14 (1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14)

Show columns: QID, Batch, Job, Task, Status, Jobstart, Jobtime, Taskstart, Tasktime, Operator, Station, Priority, Docs, Pages, Serial, ImageID, StationID, OfficeID

Using DataCap

The Job Monitor Page (cont.)

1. Obtain the ImageID from bottom of DataCap Confirmation sheet.
2. Locate the ImageID on the Job Monitor page.
3. Select the QID hyperlink for that record.
4. DataCap will then guide you through the tasks needed to complete each document.

The screenshot shows the 'Job Monitor' page in the IES DataCap application. The page title is 'IES » Job Monitor'. The interface includes a navigation bar with 'Home', 'Operations', and 'Monitor' tabs. The main content area displays a table of job records. The table has columns for QID, Batch, Job, Task, Status, Operator, Docs, Pages, ImageID, and OfficeID. The records are sorted by QID, and the first record is highlighted. The table also includes a 'Show columns' button and a 'Refresh rate' dropdown set to '10 sec'.

4	5	6	7	8	9	10	11	12	13
QID	Batch	Job	Task	Status	Operator	Docs	Pages	ImageID	OfficeID
12007	20160812 000003	Folder Job	FolderScan	pending	IES QA Rule1	0	0		
12006	20160812 000002	Folder Job	Verify	pending		1	1	20160812152611	20
12065	20160812 000001	Folder Job	DocFoup	pending		0	1	20160812152606	20
12084	20160812 000000	Folder Job	Verify	pending		1	1	20160812152636	20
12083	20160811 000040	Folder Job	Verify	pending		1	1	20160812152549	20
12062	20160811 000039	Folder Job	ExportCM	Job done	IES QA Rule2	1	1	00000020	99
12061	20160811 000038	Folder Job	ExportCM	Job done	IES QA Rule4	1	1	00000022	99
12060	20160811 000037	Folder Job	ExportCM	Job done	IES QA Rule3	1	1	00000021	99
12079	20160811 000036	Folder Job	ExportCM	Job done	IES QA Rule4	1	1	00000020	99
12078	20160811 000035	Folder Job	ExportCM	Job done	IES QA Rule2	1	1	00000019	99
12077	20160811 000034	Folder Job	ExportCM	Job done	IES QA Rule2	1	1	00000019	99
12076	20160811 000033	Folder Job	ExportCM	Job done	IES QA Rule4	1	1	00000018	99
12075	20160811 000032	Folder Job	ExportCM	Job done	IES QA Rule2	1	1	00000016	99
12074	20160811 000031	Folder Job	ExportCM	Job done	IES QA Rule4	1	1	00000015	99
12073	20160811 000030	Folder Job	ExportCM	Job done	IES QA Rule2	1	2	00000014	99

14 1 2 3 4 5 6 7 8 9 10

Show columns

3 QID Batch Job Task Status Job start Job time Task start Task time Operator Station Priority Docs Pages Serial ImageID StationUserID OfficeID

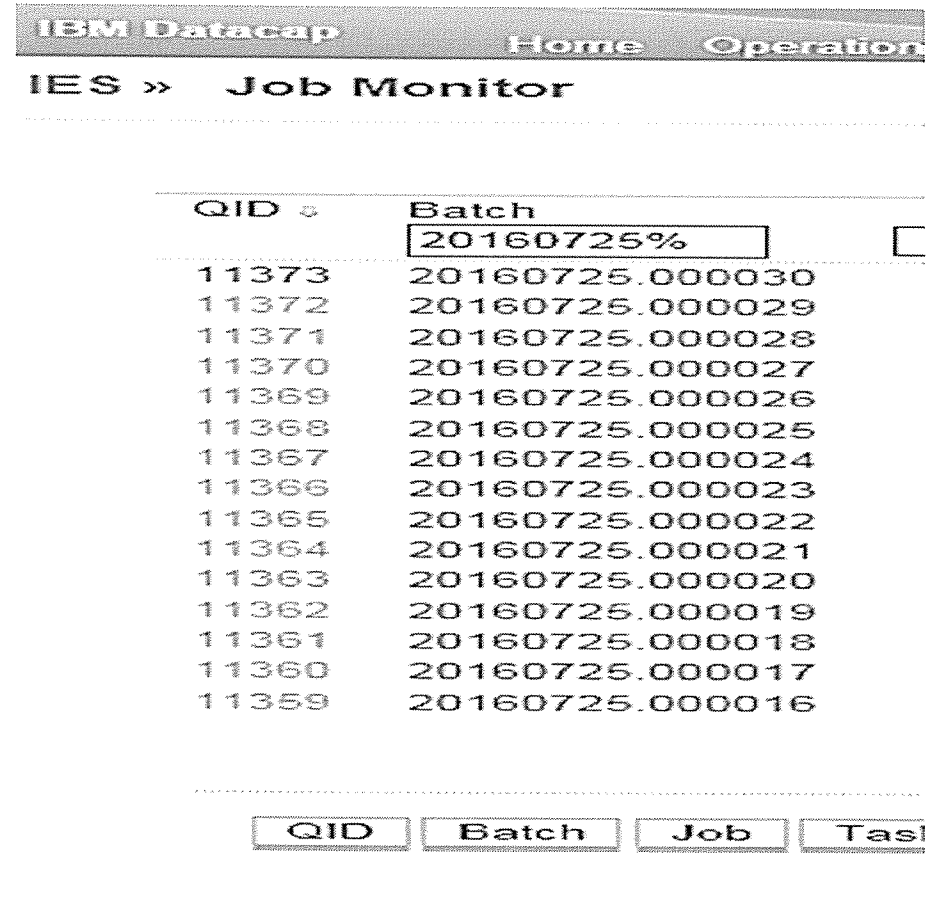
Copyright © 2014 IES Corporation

Note: Only records for your office have active hyperlinks.

Using DataCap

The Job Monitor Page (cont.)

- ▶ Batch column will display the Batch# for your document.
 - The Batch# format is yyyyymmdd.000###,
 - e.g.. If the day you scan is 07/25/2016, your batch will resemble 20160725.000001
 - The Batch field can be filtered for a specific date.
 - e.g. To search a specific date of 07/25/2016, enter 20160725% in the search box at the top of the column. (% = a wildcard symbol for unlimited characters to be used at the beginning or end of search criteria).



The screenshot shows the IBM Datacap Job Monitor interface. At the top, there are navigation links for "Home" and "Operations". Below that, the page title "IES » Job Monitor" is displayed. A search box for the "Batch" column contains the text "20160725%". The main table lists QID and Batch values. At the bottom, there are buttons for "QID", "Batch", "Job", and "Task".

QID	Batch
11373	20160725.000030
11372	20160725.000029
11371	20160725.000028
11370	20160725.000027
11369	20160725.000026
11368	20160725.000025
11367	20160725.000024
11366	20160725.000023
11365	20160725.000022
11364	20160725.000021
11363	20160725.000020
11362	20160725.000019
11361	20160725.000018
11360	20160725.000017
11359	20160725.000016

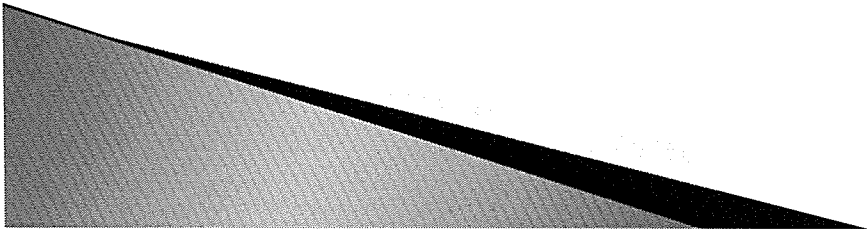
Using DataCap

The Job Monitor Page (cont.)

- ▶ **Job column** will display the document import type, e.g.. File, Folder, Fax or Email Job.
- ▶ **Task column** will display the task status of the document, e.g.. DocFixup, VerifyFormID, Verify and ExportCM
- ▶ **Status column** will display whether the task is Pending, Running, On Hold or Job Done

Job	Task	Status
Folder Job	ExportCM	Job done
Folder Job	ExportCM	Job done
Folder Job	ExportCM	Job done
Folder Job	ExportCM	Job done
Folder Job	ExportCM	Job done
Folder Job	ExportCM	Job done
Folder Job	ExportCM	Job done
Fax Job	ExportCM	Job done
Fax Job	ExportCM	Job done
Folder Job	ExportCM	Job done
Fax Job	ExportCM	Job done
Fax Job	Verify	hold
Fax Job	Verify	pending
Folder Job	ExportCM	Job done
Folder Job	ExportCM	Job done

... 41 42 <



Using DataCap

The Job Monitor Page (cont.)

- ▶ **Operator column** displays who is working on a task and who has placed a document on hold.
- ▶ **Docs column** will display how many separate documents types/forms that were scanned together in one batch.
- ▶ **Page column** will display the total # of pages in the batch that were scanned together in one batch.

Items per page Delete batches

Operator	Docs	Pages
<input type="text" value=""/>		
IES.QA.Rule1	0	0
IES.QA.Rule1	1	1
gladys.hansen-guerra	0	1
aaron.favreau	1	1
irene.ramos	1	1
IES.QA.Rule2	1	1
IES.QA.Rule4	1	1
IES.QA.Rule3	1	1
IES.QA.Rule4	1	1
IES.QA.Rule2	1	1
IES.QA.Rule2	1	1
IES.QA.Rule4	1	1
IES.QA.Rule2	1	1
IES.QA.Rule4	1	1
IES.QA.Rule2	1	2

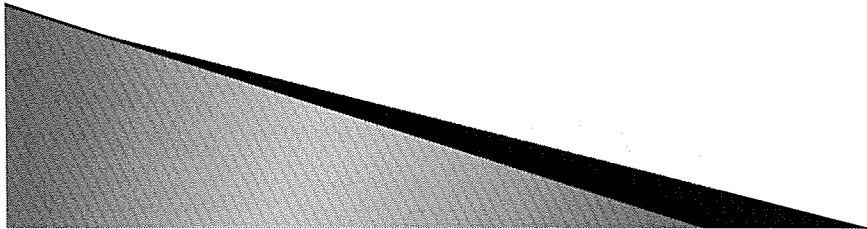
9 10 ...

Using DataCap

The Job Monitor Page (cont.)

- ▶ ImageID column displays the image ID # from the cover page at time of scanning.
- ▶ OfficeID column displays the different offices using DataCap. It should be filtered to display your office #, e.g.. 20 for Christian County, 79 for Ogle County and 237 for Northwest FCRC

Filter...	Refresh rate	10 sec ▼	Default
	ImageID	OfficeID	
	<input type="text"/>	<input type="text" value="▼"/>	
	20160616083103	79	
	20160615145325	20	
	20160615145320	20	
	20160615144807	20	
	20160615144212	237	
	20160615143750	20	
	20160615123454	237	
	20160615100126	20	
	20160615092656	20	
	20160615092647	20	
	20160615092332	20	



Using DataCap

The Job Monitor Page (cont.)

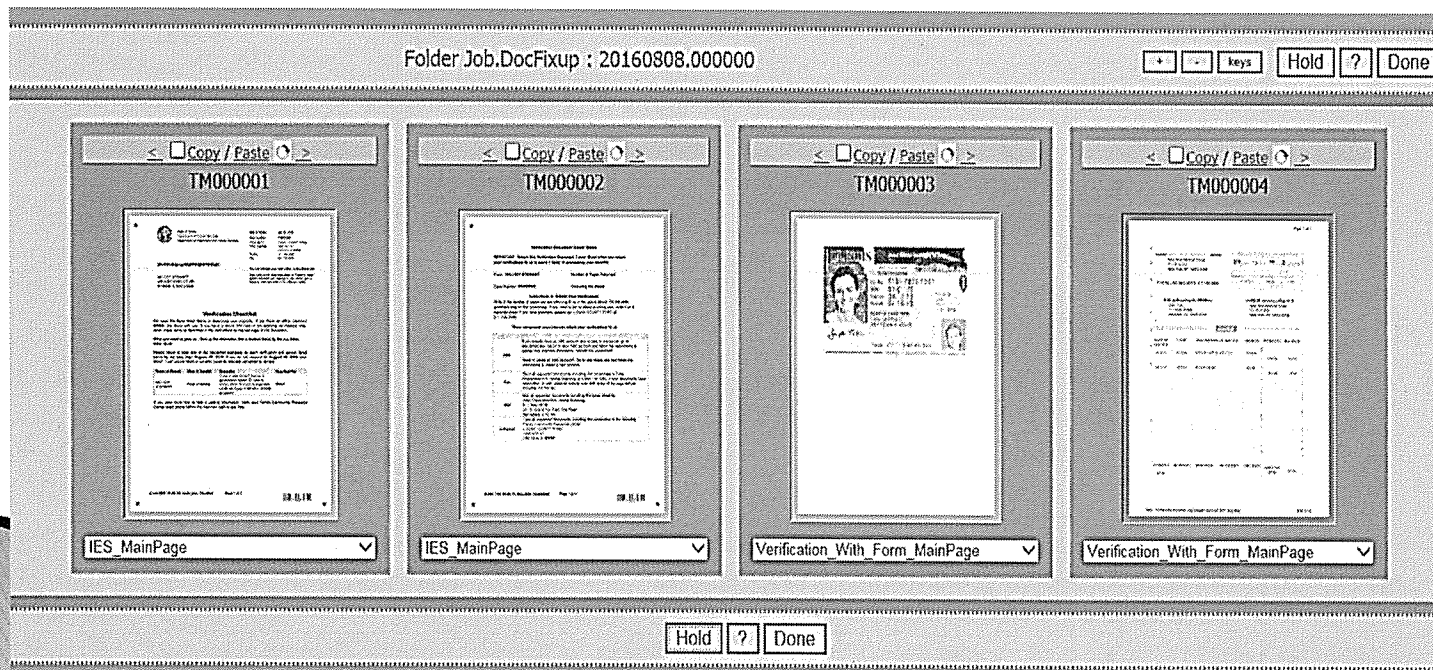
- ▶ After completing each individual task, DataCap will return you to the monitor screen where you will select the same QID link once again to move onto the next step process in the task.
- ▶ The task is complete when the task column reads ExportCM and the status column reads Job Done

QID	ESN	Job	Task	Status	Jobstart	Job Taskstart	Operator	Cors	Psys	InpayID	StatusID	I	
377	21602700019	False	VerifyFunD	pending	2160627102010	0	2160627102010		4	4	21602700019	False	79
378	21602700019	False	Verify	pending	2160627102010	0	2160627102010		6	6	21602700019	False	79
375	21602700014	False	ExportCM	Job Done	2160627102010	0	2160627102014	ESCARA02	2	2	21602700014	False	79
374	21602700010	False	VerifyFunD	hold	2160627102010	0	2160627102010	esrcar02	2	2	21602700010	False	79
373	21602700009	False	DefExp	pending	2160627102010	0	2160627102009		0	1	21602700009	False	79
372	21602700006	False	VerifyFunD	running	2160627102010	0	2160627102003	galykhanov-pers	1	1	21602700006	False	79
371	21602700007	False	ExportCM	Job Done	2160627102010	0	2160627102008	ESCARA02	1	1	21602700007	False	79
370	21602700005	False	ExportCM	Job Done	2160627102010	0	2160627102006	ESCARA02	1	1	21602700005	False	79
369	21602700005	False	ExportCM	Job Done	2160627102010	0	2160627102005	ESCARA04	1	1	21602700005	False	79
368	21602700004	False	ExportCM	Job Done	2160627102010	0	2160627102007	ESCARA02	1	1	21602700004	False	79
367	21602700003	False	ExportCM	Job Done	2160627102010	0	2160627102011	ESCARA01	1	1	21602700003	False	79
366	21602700002	False	ExportCM	Job Done	2160627102010	0	2160627102005	ESCARA02	1	1	21602700002	False	79
365	21602700001	False	ExportCM	Job Done	2160627102010	0	2160627102006	ESCARA01	1	1	21602700001	False	79
374	21602700000	False	ExportCM	Job Done	2160627102010	0	2160627102004	ESCARA01	1	2	21602700000	False	79
371	21602700000	False	ExportCM	Job Done	2160627102010	0	2160627102010	ESCARA02	1	1	21602700000	False	79

Using DataCap

The DocFixup Screen

- ▶ You will only be prompted to use DocFixUp if DataCap requires further clarification as to the document type and document order, e.g.. Main page, trailing page.
- ▶ The DocFixup task screen is where you will choose the type of document you have scanned using the drop down menu.
- ▶ For each IES generated form, you will need to select from the drop down menu either IES main page or IES trailing page.
- ▶ For each State Library form, you will need to select from the drop down menu the form # that corresponds to the document, e.g.. 2378B Main Page, 2378B Trailing Page.
- ▶ The pages that need to be verified in DocFixup will be highlighted in blue.

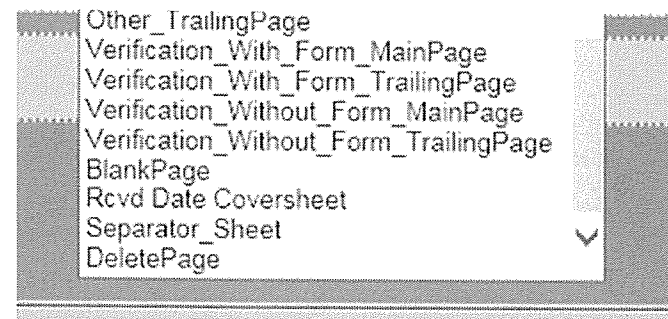


Using DataCap

The DocFixup Screen (cont.)

- ▶ **Verifications** – For each verification* in the batch, use the drop down menu to choose:
 - Verification_With_Form_MainPage;
 - Verification_With_Form_TrailingPage;
 - Verification_Without_Form_MainPage;
 - Verification_Without_Form_TrailingPage.
- ▶ **Blank Pages** – For blank pages in DocFixUp, select “Blank Page” from the drop down menu to remove from your batch.

*Verifications refers to supporting documentation submitted by the client, e.g.. Birth Certificate, ID, bank statements.

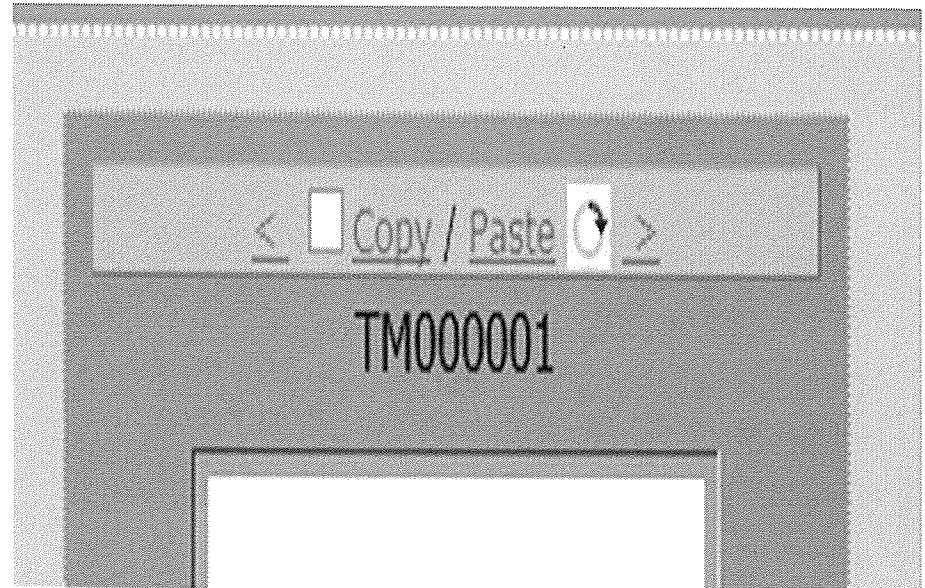


Using DataCap

The DocFixup Screen (cont.)

- ▶ Reorder Documents – In DocFixup, documents can be reordered by choosing the left and right arrows above the page to be moved.

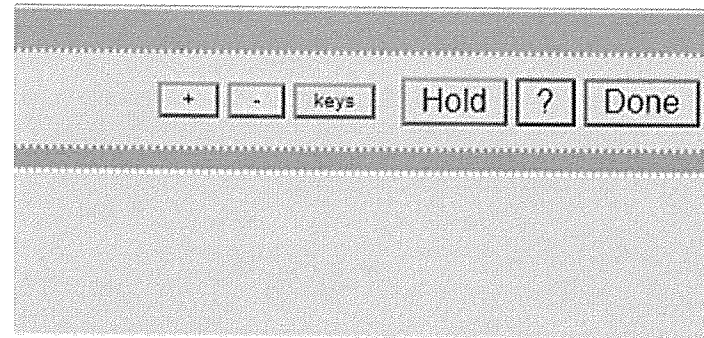
- ▶ Rotate Documents – In DocFixup, documents can also be rotated by using the rotate icon above the page to be rotated. This will rotate the document in 90 degree intervals.



Using DataCap

The DocFixup Screen (cont.)

- ▶ **Hold Button** – If you are unsure about any of the documents or cannot finish the verification process, you can place the batch on hold by selecting the Hold button at the top of the page. This function is available to you during any of the DataCap tasks.
- ▶ **Done Button** – Once you are finished verifying all the pages in DocFixup, you can submit by using the Done button at the top of the page. You will then be returned to the monitor screen, where the next task will be VerifyFormID or Verify.



Using DataCap

The VerifyFormID Screen

- ▶ The VerifyFormID task will only occur if DataCap does not recognize the document FormID, Form Version, or PageID.
- ▶ The Form ID, Form Version and Page ID can be either entered manually or by hovering the mouse pointer over the required field on the form.
- ▶ This may need to be done for several pages where these fields are not recognized by DataCap.

This form only applies to persons who are U.S. citizens.

Because of a new federal law, we must ask people who are United States citizens to show documents that prove they are citizens. The law does not affect people who are not U.S. citizens.

The new law affects most children and adults if they are citizens who request medical benefits or get medical benefits. U.S. citizens who get SSI (Supplemental Security Income), Social Security Disability or Medicare do not have to show documents.

This form tells you what documents we need to see for all persons who are citizens who are requesting medical benefits or are named on your medical card.

If you have the following documents for anyone on your medical card, take them to your local Illinois Department of Human Services office:

- U.S. Passport
- Certificate of Naturalization (N-550 or N-570)
- Certificate of Citizenship (N-560 or N-580)

If you do not have one of the documents listed above, then we need to see two documents for each person on your medical card. You need to bring one item from EACH box for each person.

If anyone's name is different than the name on the documents that prove they are citizens, we need to see another document that caused the name change. For example, this could be a certificate of marriage, or court order, or other official document.

Papers that show Place of Birth

- Certified copy of a birth certificate from the state or county where the person was born.
- Final Adoption Decree.
- Official military record that shows a place of birth, or
- Papers showing the person was employed by the U.S. government before 1979.

ID Card with Photo or other information that identifies the person.

- Driver's license.
- State issued ID card.
- School ID.
- U.S. Military ID.
- U.S. Military dependent card (ID).
- Other government ID (city, county or U.S. state issued).
- Photo (children under age 16 school or day care records).

Take this page over to read more information on the back.

HFS-3859A (R-09-15) Help Sheet for US Citizenship and Identity Documents Page 1 of 2

Form ID: HFS-3859A
Form Version: (R-09-15)
Page ID: 1

20160006 000003	IES	2
20160506 000003 01	IES_Form	1
TM000001	1_MainPage	1
TM000002	1_TrainingPage	1

Prev Next + ecoWords + courses | Zoom In Zoom Out Quarter Width Height

Using DataCap The Verify Screen

- ▶ The worker will always be routed to the Verify Screen as the **final task**.
- ▶ Depending on what is required, DataCap may prompt worker to enter:
 - Correspondence ID (IES barcode)
 - The Case number or Application number
 - First Name
 - Last Name
 - The Received date

The screenshot displays a web-based verification interface. At the top, there is a navigation bar with buttons for 'Submitt', 'Prev', 'Next', and 'Hold'. Below this, a 'Verification Checklist' section provides instructions and a table of required documents. The main area contains several input fields with labels and values:

- Correspondence ID:** 5373427
- Case Number:** 103800340
- First Name:** MELODY
- Last Name:** STEWART
- Received Date:** 08/08/2016

At the bottom of the page, there is a footer with navigation options: 'Prev', 'Next', '+ controls', '+ columns', 'Zoom In', 'Zoom Out', 'Quarter', 'Width', and 'Height'.

Using DataCap

The Verify Screen (cont.)

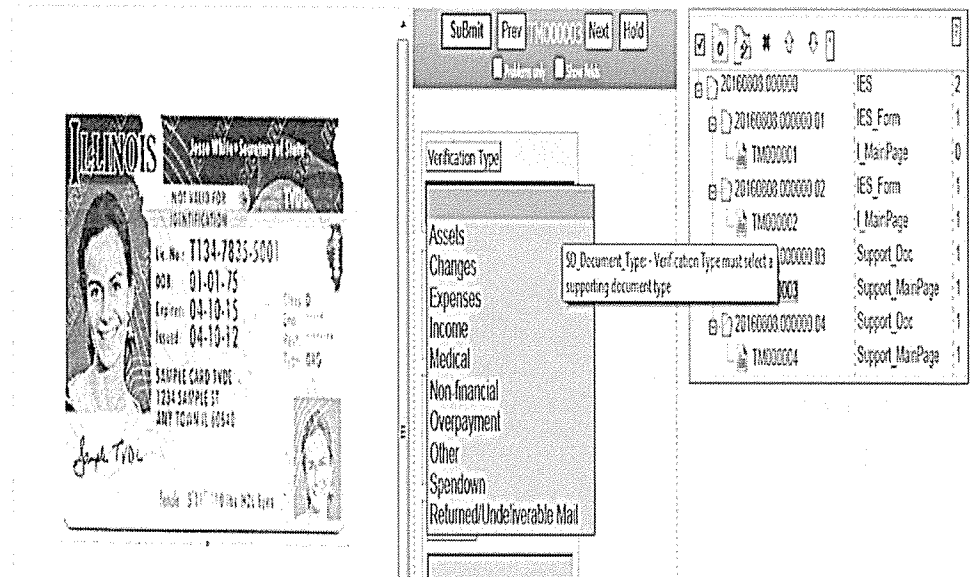
- ▶ Note: Document Batch tree on the lower Right Hand side of the screen has red and blue page icons.
 - **Red page icons** – documents that will need to be verified.
 - **Blue page icons** – documents that do not require any further verification
 - The icons will change from red to blue if verification was successful.

Folder/Item	Type	Count
20160808.000000	IES	2
20160808.000000.01	IES_Form	1
TM000001	_MainPage	0
20160808.000000.02	IES_Form	1
TM000002	_MainPage	1
20160808.000000.03	Support_Doc	1
TM000003	Support_MainPage	1
20160808.000000.04	Support_Doc	1
TM000004	Support_MainPage	1

Using DataCap

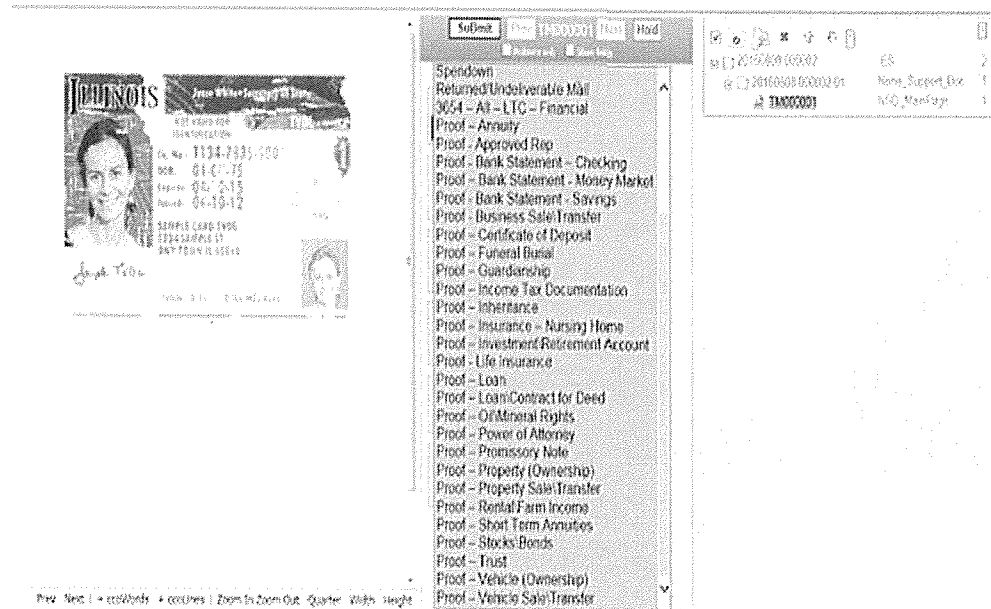
The Verify Screen with Verifications

- ▶ If the batch contains verifications, use the verification type dropdown and select the correct type of verification.
- ▶ Your menu options are:
 - Assets
 - Changes
 - Expenses
 - Income
 - Medical
 - Non-financial
 - Overpayment
 - Other
 - Spenddown
 - Returned/Undeliverable Mail



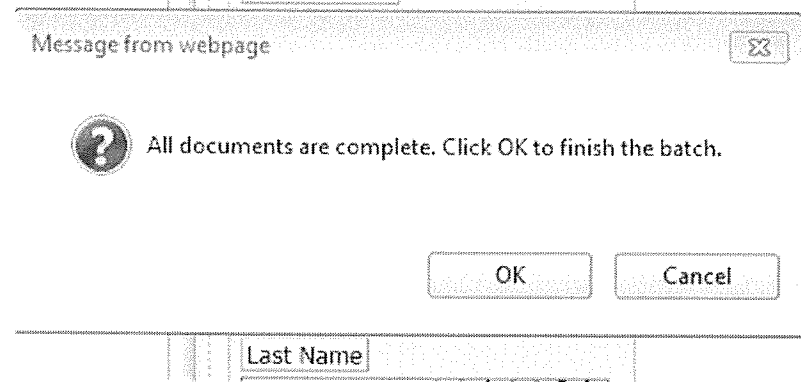
Using DataCap The Verify_FormID Screen with Verifications – LTC Offices

- ▶ LTC offices will have more options for verifications



Using DataCap The Verify Screen

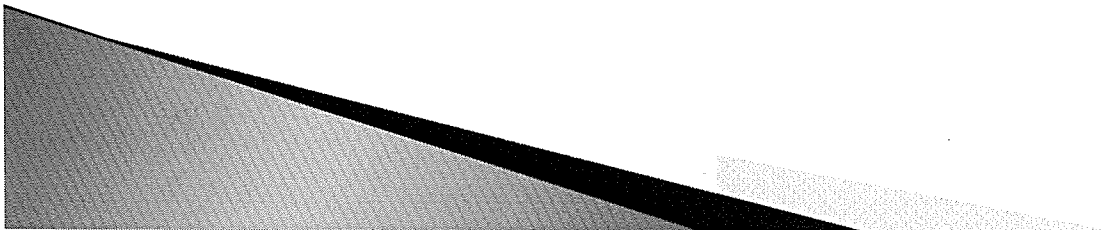
- ▶ Once the verification process is complete, a pop-up message will prompt the worker to either click “OK” to submit the documents or “Cancel” to make edits.
- ▶ Once the worker has clicked “Ok” to submit, the batch is routed to Content Manager
- ▶ Once DataCap has finish processing the batch, it should appear on the Monitor Screen as Task = Export CM and Status= Job Done.



Content Manager

- ▶ Content Manager sends the batch to IES, routing it to the correct case and IES EDM inbox queue.

```
11671 20160805.000017 Folder Job ExportCM Job done 2016-08-05 14:10:37 IES.QA.Rule4 1 1 20160805141401 20
44270 20160805.000040 F U L L F I L L 2016-08-05 14:10:37 IES.QA.Rule4 1 1 20160805141401 20
```



IES Verification

- ▶ You will now be able to log into IES and find your documents in the EDM inbox.
- ▶ Batches usually take 15 minutes to move from CM to IES.

The screenshot displays the 'Search Electronic Document Inbox' web application. On the left is a navigation menu with options like 'Home', 'Documents & Site', 'EDM Tasks', 'Unprocessed', 'Document Search', 'Admin Registration', 'Help', 'SAP', 'Collection', 'My', 'E-Source', 'Recovery', 'MS', 'Non-Drive', 'E', 'Merge', 'Reminders', and 'Office'. The main search area includes fields for 'Doc Application #', 'Perks', 'Date Received from', and 'Date Due From'. Below these are 'Document Task Title' options: '171-C Initial Address Change & Change Info', '172-Apply for Driver's License', '173A - Preparing Report', and '173B - Approval'. There are also sections for 'QUEUE' (Change Date), 'Auto Registration Eligible', and 'Child Eligible Amount'. The 'Search Results' section shows '(Retrieved Results Count: 1 Applications/Cases)' and a table with columns: Case/App/Agent, Document/Task, Office, Name, and Indicator. One result is visible: '15100140', 'Non-Facsimile', 'Logan County', and 'FAC'. The right side of the screen shows a document preview of a 'ILLINOIS' driver's license for 'Jason White Sangster of State'. The license is marked 'NOT VALID FOR IDENTIFICATION' and includes details: 'Lic. No.: T134-7835-5001', 'DOB: 01-01-75', 'Expires: 04-10-15', 'Issued: 04-10-12', and 'SAMPLE CARD INFO: 1234-SAMPLE ST, ANY TOWN, IL 60630'. A signature 'Jason White' is visible at the bottom left of the license image.

Using Datacap Example 1 New Application (cont.)

4. Obtain ImageID – use the Image ID that is on your confirmation page to locate the Image ID in DataCap.
5. Select QID # – You will now follow the Image ID ending in 113517 to the batch# 20160808.000001 and QID# 11674 and select the hyperlink.

conn	Result
aacap_test\uat\Scan\Input\79\AE9123127\20160808113517.	Completed

11674

20160808 000001

Folder Job DocFixup

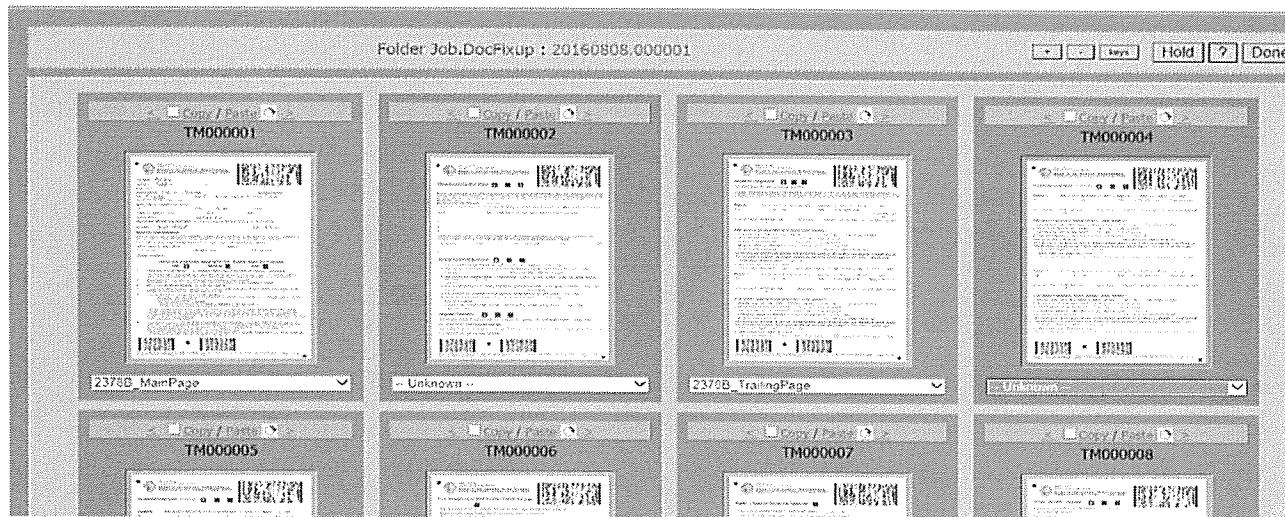
pending

0

20160808113517

Using Datacap Example 1 New Application (cont.)

6. Complete DocFixup (if needed) –
 - Start the DocFixup task and verify your documents using the drop down menu.
 - The pages that need to be verified will be highlighted in blue.
 - When finished verifying in DocFixup, you will Done.
 - You will be returned to the Job Monitor Page to continue the verification process and once again select the QID hyperlink.



Using Datacap Example 1 New Application (cont.)

7. Complete Verify –

- This is where you will enter the applicants first name, last name, date of application
- Click Submit when done to Export to CM.

**Department of Human Services
Request for Cash Assistance - Medical Assistance - Supplemental Nutrition Assistance Program (SNAP)**

Last Name: Bright
First Name: Down
Maiden Name: _____
Approved Applicant: Yes No
City: Chicago State: IL Zip Code: 60607 County: Cook
Are you homeless? Yes No
Mailing Address (if different from above):
City: _____ State: _____ Zip Code: _____ County: _____
Telephone (include home, office, cell): _____
Days/Evening phone: _____
Signing here will start your application. You must sign Page 48 before we approve you for any benefits.
Client ID: Down Bright Date: 8/8/16
Approved Representative
When you sign to have an approved representative sign for you, you give permission for the person to sign your application for you. Go to receive actual information about this application, and to allow you to see others with the agency.
Do you want to name an approved representative? Yes No. If yes, check the following:
Name of approved representative: _____ Address: _____
Phone Number: _____
Signature of representative: _____
Date of signature: _____

Instructions to person(s) applying for Cash, Medical, and/or SNAP benefits
Cash Medical SNAP
1 Please print all of your answers on this application form so that we can read and process your answers.
2 You must sign and date immediately after the application as long as the top of this page (page 48) is completed with your name, address and signature. The "day of this signed page (page 48) starts the application processing timeline."
3 Read pages 16 & 17 to know you sign to accept responsibility for SNAP benefits.
4 Read pages 18, 17 and 18 to know your rights and responsibilities for Cash and Medical benefits.
5 **Before you can get any benefits, you must sign page 48.**
6 If applying for cash benefits, a decision on your eligibility will be made within 30 days. If you qualify for the SNAP benefits, we'll be issued from the date the application is filed.
7 You may be entitled to receive SNAP benefits even if:
- your gross non-welfare income and liquid assets are less than your monthly net or net wage payment and the applicable asset limit;
- you have assets of \$100 or less and
- your gross monthly income for the month of application is less than \$150 or
- at least one certifying signatory is a migrant who is "out of funds."
8 You may complete forms at a Department of Human Services (DHS) office. Another method is the successful completion of an online application. You will receive an email notification to complete the application. If you have any questions for the Department of Human Services, please call 1-800-342-7343. For information on SNAP, visit the DHS website at www.dhs.gov. For information on SNAP, visit the DHS website at www.dhs.gov.
9 If you want to register to vote, fill out the attached Illinois State Registration Application (ISRA) and give it to your DHS office or your state election office. For this step, please see the instructions on page 48 of your DHS Family Community Resource Center. You may also call the helpline at 1-800-342-7343 or 1-800-342-7343 for more information.
For administrative contact, see page 48 of this application form.

Prev Next | + ccoWords + ccoLines | Zoom In Zoom Out Quarter Width Height

Using DataCap Example 1 New Application (cont.)

- ▶ Example: Content Manager has exported your new application to IES and assigned a T#, Dawn Bright T05384387.
- ▶ You should be able to find your application in the EDM inbox, screen new application queue, using applicant first and last name.
- ▶ Start application registration.

The screenshot displays the IES system interface, specifically the Electronic Documents Inbox search results. The interface includes a navigation menu on the left, a search area at the top, and a results table at the bottom.

Search Results: (Retrieved Results Count : 1 Applications/Cases, 1 Documents)

Case/Approved	Document/Task Title	Office Name	Special Indicator	Name	Received Date	Status	Action Taken by	Action
00184387	2710 - Application For Assistance	10400	10400	Bright, Dawn	06/08/2015	New		Print

Additional interface elements include a 'Start Read Document' button and a 'Records 1 of 1' indicator at the bottom right.

Using Datacap Example 2 Redetermination Form

1. Rede Received—
While most redeterminations will be sent to CSU for scanning, local office may still receive via in person, mail or drop off.

2. Scan Rede –

- scan redetermination and any verifications into DataCap together and obtain a confirmation page

The job has been sent
Job Date & Time: 08/10/2016 11:20 AM

State of Illinois
Department of Human Services
Division of Financial Services
Charles F. Faulhaber
19 MILLINGTON RD
MORTONSHIRE, IL 62553-2907

Open Dates: July 01, 2016
Case Number: 4124784
DPA Number: 1-800-843-6154
DPA System: WISCONSIN
Phone: 630-232-8100
Fax: 630-232-8100

Medical Benefits Renewal Form

You must respond to this form by September 01, 2016 to continue getting medical benefits after September 2016.

To find out if you qualify for medical benefits beginning October 2016, let us about your household. You can do this one of four ways:

- Complete the electronic version of this form on the IBM Manage My Care at ibm.managemycare.com.
- Complete your redetermination over the phone by calling 1-800-843-6154 (TTY: 1-800-457-6444).
- Fill out, sign, and mail us this form and all verifications we ask for. You may drop the form by mail at the:
 - Mail to P.O. Box 28788, Springfield, IL 62702; or
 - Fax the form to 1-844-735-3053; or
- If you want to complete your redetermination in person, call 1-800-843-6154 (TTY: 1-800-442-6444) to find help near you.

1. Do these people still live with you?
 CHARLES FAULHABER 08/10/2016 Yes No

2. Are there other people living with you and date of birth if they still live here?

Full Name	Birth Date	Relationship
.....
.....
.....

For additional persons, please attach a separate sheet.

See the paper over to read more information on the back.
COMPLETE AND SEND

FE 423 (8-08-14) Medical Benefits Renewal Form Page 1 of 6

Date & Time Sent	Recipient Information	Result
08/10/2016 11:21 AM	0 Illinois gov\UES\datacap_test\test\ScanData\LTCVA\9901309_20160810113029_XSMF0030001.FIX	Completed

Using Datacap Example 2

Redetermination Form (cont.)

4. **Obtain ImageID** – use the Image ID that is on your confirmation page to locate the Image ID in DataCap.
5. **Select QID** – follow the Image ID ending in 112029 to the batch# 20160810.000257 and QID# 12031 and select the hyperlink.

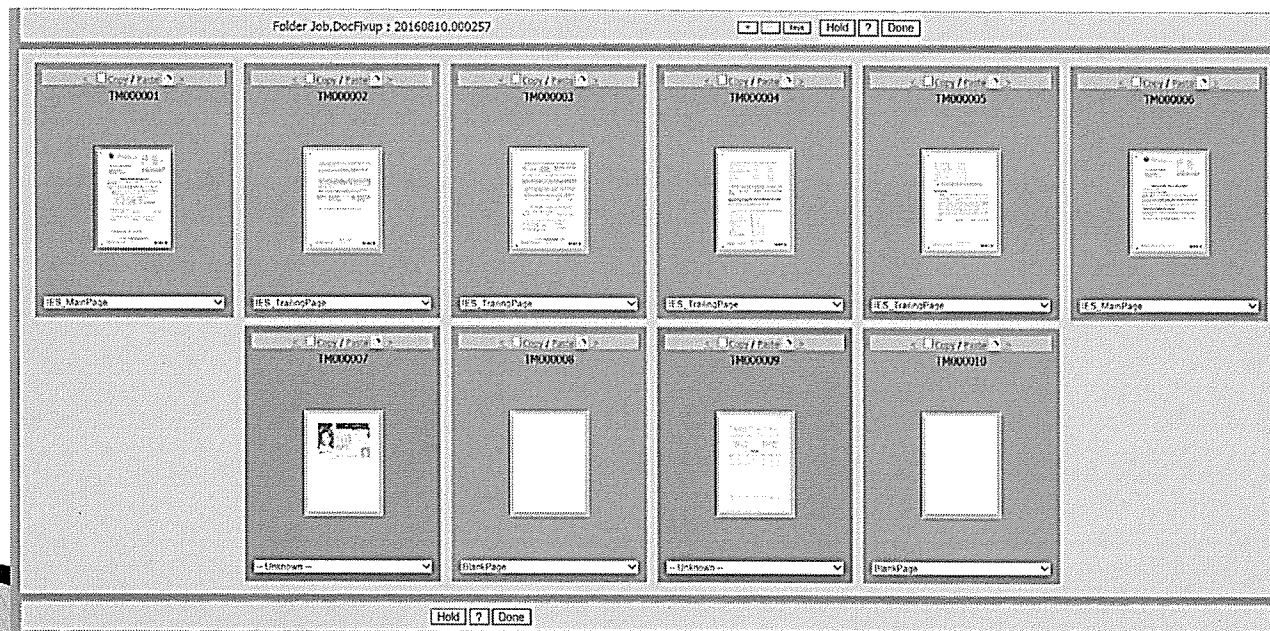
Date & Time Sent	Recipient Information	Result
08/10/2016 11:21 AM	Willinois.gov\IES\datacap_test\uat\Scan\Input\LTC\AE9901309_20160810112029.XSM\00000001.TIF	Completed

12031	20160810.000257	Folder Job	DocFixup	pending	2016-08-10 11:17:30	0	10	20160810112029	20
-------	-----------------	------------	----------	---------	---------------------	---	----	----------------	----

Using Datacap Example 2

Redetermination Form (cont.)

5. Complete DocFixup – start the DocFixup task and verify your documents using the drop down menu.
 - The pages that need to be verified will be highlighted in blue.
 - When you are finished verifying in DocFixup, you will enter Done.
- ▶ You will be returned to the Job Monitor Page to continue the verification process and once again select the QID hyperlink.



Using Datacap Example 2 Redetermination Form (cont.)

- Complete Verify** – start the Verify task.
 - This is where you will enter the Correspondence ID, Case #, Client first and last name, and date noticed was received.
 - For verifications that are submitted with the redetermination, you will verify the verifications type, you can leave the correspondence ID blank, complete Case #, client first and last name and date.
 - Click Submit when done to Export to CM.

The screenshot displays a Datacap interface with several components:

- Medical Benefits Renewal Form:** A document on the left with instructions for renewal.
- Correspondence List:** A table in the center showing a list of items with columns for ID, Name, and Page.
- Client Photo:** A photo of Charles Faulhaber on the right side.
- Form Fields:** A form on the far right for entering verification details, including:
 - Applicant Type: Non-Financial
 - Correspondence ID: (blank)
 - Case Application Number: 603427846
 - First Name: Charles
 - Last Name: Faulhaber
 - Received Date: 06/10/2016

Using Datacap Example 2 Redetermination Form (cont.)

- ▶ Content Manager has exported your redetermination and verifications to IES.
- ▶ You should now be able to find your redetermination in the EDM inbox using the customer's case number and selecting either the interview required– initiate rede or no interview required–initiate rede queue.
- ▶ You will now be able to start the redetermination task.

Electronic Document Inbox

UAT test267's Inbox

Choose View

Reset Search

Search Electronic Document Inbox

Case/Application # [233427845] Appeal # [] Action Taken By []

Prefix [] First [] Middle [] Last [] Suffix []

Date Received From [mm/dd/yyyy] Date Received To [mm/dd/yyyy]

Date Due From [mm/dd/yyyy] Date Due To [mm/dd/yyyy]

Document/Task Title

602 - Medical Rede

Special Indicator

602 - Cash Assistance
Appeals ADH
Appeals All Kids
Appeals Child Care

QUEUE: Interview Required - Initiate Rede

Show Documents Started by Others

Auto Registration Exception

Show Documents in all Offices

Cold Calling Attempt

Show Completed/Duplicate

Show tasks with no appointments Rescheduled

Reset Search

Search Results

(Retrieved Results Count : 1 Applications/Cases, 1 Documents)

Case/Appel #	Document/Task Title	Office Name	Special Indicator	Name	Received Date	Status	Action Taken By	Action
602427845	602 - Medical Rede	IHFS	H39D	FAULHABER, CHARLES	08/10/2016	New		Start

Record Set 1 of 1