



Electronic Document Management (EDM)



Module Learning Objectives:

After completing this module, you will be able to:

- Understand the EDM Inbox functionality
- View previously uploaded documents in IES
- Upload a document into IES
- Re-index a document from one case to another



EDM Inbox

EDM Inbox



Electronic Documents Inbox **ABE Application Details** Cold Calling Details

Electronic Documents Inbox ? ★ 📄

IES Train024's Inbox

+ Choose View **Reset** **Search**

Search Electronic Document Inbox

Case/Application #: 🔍 Action Taken By: 🔍

Prefix: First: Middle: Last: Suffix:

Date Received From: Date Received To:

Date Due From: Date Due To:

Document/Task Title: Special Indicator:

0034 Consent to release information

051-Assistance to the Blind, Report of Eye Ex:

1044-Routing

1229A LTC/SLF Rede

CILA

Cash Assistance

DOA

Emergency Medical - Non Citizen

QUEUE:

Show Documents Started by Others: Cold Calling Attempt:

Show Completed/Duplicate:

Reset **Search**

Search Results (Retrieved Results Count : 21 Applications/Cases, 21 Documents)

Case/Application #	Document/Task Title	Office Name	Special Indicator	Name	Received Date	Status	Action Taken By	Action
T10119033	ABE Application	Kane County Elgin FCRC	Medicaid Application,Non Expedited,Cash Assistance	FOREMAN, ANNA	09/15/2014	New		Start ✎
T10119034	ABE Application	Kane County Elgin FCRC	Medicaid Application,Non Expedited,Cash Assistance	VENTURA, ANNA	09/15/2014	New		Start ✎
T10119036	ABE Application	Kane County Elgin FCRC	Medicaid Application,Non Expedited,Cash Assistance	HAMM, ANNA	09/15/2014	New		Start ✎

EDM Inbox



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T10119036	ABE Application	Kane County Elgin FCRC	Medicaid Application,Non Expedited,Cash Assistance	HAMM, ANNA	09/15/2014	New		Start 📄

EDM Inbox



Search Electronic Document Inbox

Case/Application #:

Action Taken By:

Prefix: First: Middle: Last: Suffix:

Date Received From:

Date Received To:

Date Due From:

Date Due To:

Document/Task Title:

Special Indicator:

0034 Consent to release information
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QUEUE:

Cold Calling Attempt:

Show Documents Started by Others:

Show Completed/Duplicate:

List of EDM Inbox Queues



Screen New Application



Screen MPE Application



Expedited



Interview Required – Initiate Data Collection



No Interview Required – Initiate Data Collection



Ready to Certify

EDM Inbox – Screen New Application Queue

The sort order of applications in the **Screen New Application** queue will be listed in the following order:

1. Urgency of an application
2. Special Indicator for ABE Applications

Rank	Special Indicator
1	Expedited
2	Non Expedited
3	Cash Assistance
4	Presumptive (MPE)
4	HPE
5	Medicaid Application
5	Potential AABD/LTC Eligible
5	FFM MAGI Application
5	FFM Non MAGI Application
5	ABE MAGI Application
5	ABE Non MAGI Application

- The best practice is for workers to pull applications in the order they appear in the queue, unless instructed by a manager to do otherwise.
- All tasks/documents have the **Start** or **Continue** hyperlink in the **Action** column and can be claimed in any order
- If two workers attempt to claim the same task at the same time, alert messages display.

3. Application Received date (oldest to newest)

EDM Inbox – Cold Calling

Cold calling is required for all Expedited SNAP applications with a phone number provided by the customer. When a worker claims a task from the Expedited queue, IES displays the Cold Calling Details page for workers to complete Cold Call attempts.

To search for Expedited applications awaiting a First or Second Cold Call Attempt, select the *Expedited* queue from the **Queue** drop-down list on the **Electronic Documents Inbox** page. A worker can also select *First Attempt* or *Second Attempt* from the **Cold Call Attempt** drop-down.

Cold Calling Details ? ☆ 📄 📞

Application: T00097386 Date Received: 09/16/2014

Individual Information

Name:	Ndsf,Jill	What is the best way to get in contact with you during the weekday:	N/A
Home Phone#:	N/A	What is the best time to call you during the weekday:	N/A
Work Phone#:	N/A	If you are deaf or hard of hearing and you have asked us to get in touch by phone, what method do you use:	N/A
Phone Other#:	788-146-8795		

Cold Call Attempts

Did you make a First Cold Call Attempt?	YES ▾	Date/Time Attempted:	09/16/2014
First Attempt Contact Method:	(788) 146-8795 ▾	Attempted By:	rt2.test007
First Attempt Call Outcome:	No Answer ▾		
First Attempt Application Comment:	<div style="border: 1px solid gray; height: 40px;"></div>		

Did you make a Second Cold Call Attempt?	▾	Date/Time Attempted:	09/16/2014
Second Attempt Contact Method:	▾		
Second Attempt Call Outcome:	▾		
Second Attempt Application Comment:	<div style="border: 1px solid gray; height: 40px;"></div>		

Submit and Schedule an Appointment
Submit and Go to Data Collection
Back To Inbox

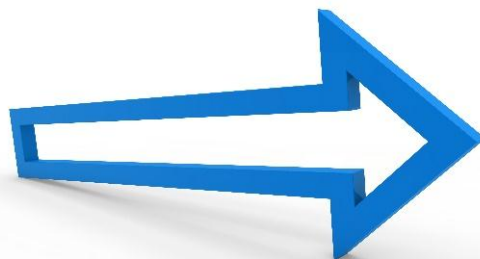
EDM Inbox – Interview Required– Missed Interviews

Applications requesting both SNAP / TANF and Medical will be moved from the **Interview Required – Initiate Data Collection** queue to the **No Interview Required-Initiate Data Collection** queue when the following happens:

1. The appointment was scheduled and the scheduled appointment date in IES has passed
2. Each night the appointment status on applications will be updated from Scheduled to No Show when the scheduled appointment date has passed.
3. The Intake Appointment status is changed to No Show
4. The application task is automatically closed in the Interview Required – Initiate Data Collection queue and a task with the status of New is created in the No Interview Required – Initiate Data Collection queue.



Interview Required –
Initiate Data Collection



No Interview Required –
Initiate Data Collection

View a Document

Document Inquiry



Electronic Documents Inquiry and Re-index Re-Index Details

Electronic Documents Inquiry and Re-index ? ★ 📄

Reset Search

Search Criteria

Prefix: First: Middle: Last: Suffix:

Case/Application #: Individual ID:

Date Received From: Date Received To: Show Documents in all Offices:

Search for Non-IES Documents:

Document/Task Title: Status: Queue:

0034 Consent to release information
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Reset Search

Search Results

▶ Case/Application #	▶ Document/Task Title	▶ Name	▶ Received Date	▶ Status	▶ Action Taken By
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Document Inquiry – Re-Indexing

Re-Index from Re-Index Details page

Electronic Documents Inquiry and Re-index | Re-Index Details

Re-Index Details ? ☆ 📄

Reset Update

Document Search

Individual ID: 1000165521 | Case #: 110007161
 Office Name: LaSalle | Application #:
 MPE Provider ID: | Document/Task Title: Proof-Age

Re-Index

Individual ID: 🔍 | Case #: 🔍
 Processed: | Application #:
 Queue: | Document/Task Title:

0034 Consent to release information
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 1229A LTC/SLF Rede

Reset Update

Re-Index from the EDM Inbox

Search Results (Retrieved Results Count : 21 Applications/Cases, 21 Documents)

Case/Application #	Document/Task Title	Office Name	Special Indicator	Name	Received Date	Status	Action Taken By	Action
T10119033	ABE Application	Kane County Elgin FCRC	Medicaid Application, Non Expedited, Cash Assistance Medicaid	FOREMAN, ANNA	09/15/2014	New		Start 

Illinois IES -- Webpage Dialog

https://10.28.112.3/ControllerServlet?REQUESTED Certificate error

Re-Index to Queue

ReIndex To Queue:

Mark Task As Complete

Mark Task As Complete:

Submit

Upload a Document/
Create EDM Inbox Task



Upload Documents/Create EDM Tasks

Upload Documents/Create EDM Tasks

Upload Documents/Create EDM Tasks

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Document/Task Group level Information

* Requested Action:

Case/Application #: Assigned To: Case/ Application Status:

Legacy Case # - - -

RIN #:

Set Due Date:

Document/Task level Information

* Individual:

* Document Category:

* Document/Task Title:

* Received Date:

* Route to Queue:

Comments:

* Choose Document:

Results

Individual	Document/Task Title	Received Date	Queue	Comments
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NEXT STOP

