USING DOCUWARE

NATIONAL WORKFORCE INSTITUTE

Using DocuWare

INTRODUCTION

DocuWare is a web-based document management system that allows Workforce Solutions staff to transmit, share, store, and retrieve documents such as financial aid applications, eligibility documents, and tracking paperwork. Using DocuWare allows staff to assist customers in a timely and efficient manner. It also helps staff throughout the system communicate more effectively regarding customer records.

Glossary of Terms

Area – Areas define the accessibility of documents. For example; confidential documents are stored in the confidential area.

Auto Index – DocuWare automatically puts a document on a particular index based on criterion selected when it's stored.

Core Document – A Label used to ensure customer documents that don't change, such as proof of birth and citizenship, are available anytime the customer applies for financial aid.

Desktop Apps – An application installed from DocuWare that allows additional functionality in DocuWare such as "Drag and Drop Documents."

Document Tray – A holding place for items scanned or imported into DocuWare but not yet stored. A place for Call Center staff or Trackers to manipulate documents.

File Cabinet – The logical container for documents. The name of the File Cabinet is Workforce.

Import – Using the Import button on top of a Tray in DocuWare brings up a windows file explorer window to select a file to import to that Tray.

Import App – Used in the background by an import computer to import PDFs to a Tray specified by the import configuration from a scanner (MFP).

Index – An identifying field, i.e. First Name, Last Name, TWIST ID, SSN.

Index Fields – Used to identify a document so you can search for it in DocuWare. There are up to 50 Index Fields available.

Label – Used to identify and route the document scanned to the appropriate place or team. The Label assigns a document to a specific List. For example; 1817s and 2583s are automatically assigned to the Tracking Unit's List; New Childcare-FA App is automatically assigned to the Call Center team List.

Layers – Layers tell you if there are additional documents clipped to the original document.

Lists – Lists group documents according to specified Functions or Labels. Lists are defined by the group that will work with the document. There are 46 defined Lists in DocuWare and one 'My List' for every Tracker and Call Center user.

Paperclip – Allows you to clip a document to a document consisting of multiple pages stapled together.

Passport Page – A blank page titled Passport used to separate documents when scanning them into DocuWare. The Passport Page triggers DocuWare to create a new document after it is scanned. Always keep a copy in your My Tray. It's also available on the Workforce Solutions website.

Search – A function on the DocuWare home screen. Searches are set up with index criteria based on permissions. Example of set searches are:

- Quick
- Advanced
- Admin

Split – You can split a stapled document to insert a new page in the location of the split. You can then staple the sections back together. Use split instead of staple when you have a large number of pages in a document.

Stamp – Stamps are used to identify actions on a document. Stamps include:

- *Approved*: The Eligibility Team has determined the customer as eligible. The Approved stamp moves the document to the List for the Fulfillment Team to work.
- *Approved Filed*: The Eligibility Team has determined the customer as eligible. The Approved Filed stamp moves the document to the Filed List. No fulfillment is needed.
- *Confidential:* The Confidential stamp puts the document on a List only staff with management permissions can view.
- *Delete:* A page or file is not needed or a duplicate. This does not delete the file, but removes it from basic searches and from a monitor's view. When the stamp is used, the reason for deleting must be documented. A file or document can be permanently deleted only with approval from management.
- *Deny:* The Eligibility Team has determined the customer ineligible. Staff will

be prompted to choose the reason the application is denied.

- *File:* Indicates an application or document has been worked and can be filed. This stamp is mainly used by the Tracking Units but may be used when an application has been completed but does not need to be fulfilled.
- *Fulfill:* When an application has been completed by the fulfilment team, the document is stamped. Fulfill to establish a completion of the process. Documents stamped Fulfill are filed.
- *Move:* Overrides the Auto Index by changing a document's Label or function allowing any open (no completed date) document to move to another List.
- *Office Action Needed:* Used on documents added to the Action Needed List for whichever Career Office initially uploaded the document. Specific actions needed will be recorded in the 'Notes' field. Response from the office will be typed in the 'Office Note' field on the document and an email notification sent to the Call Center or Tracking Unit. Example: Signature Needed.
- *Work:* The Work stamp indicates a document is currently being worked.

Staple – A multi-page document is stored in DocuWare "stapled. Stapled documents can be "unstapled" so additional pages can be added or so pages can be rearranged. The document can then be stapled back together in a specific order by clicking on the pages in the order they should appear.

Wild Card – (*) used for Searching. Fills in beginning or end of a string to tell DocuWare to search. Ex. To look for a customer using only the last four digits of his/her SSN enter *#### in the SSN index field. The star alerts DocuWare that characters are missing.

NOTES

LOG ONTO DOCUWARE

DocuWare functions best when using the Google Chrome web browser and will not function in Linux or Mac browsers.

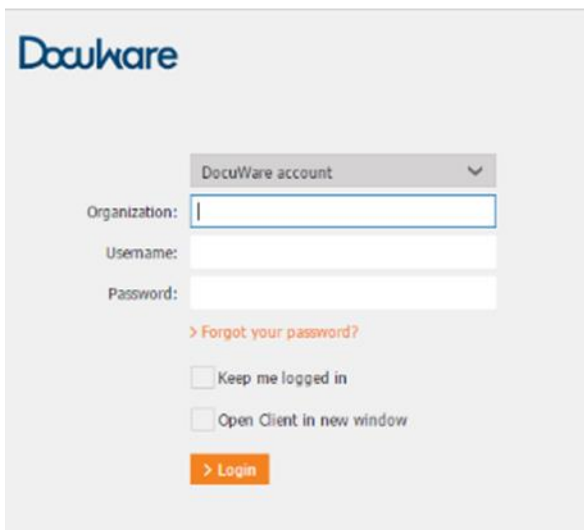
To log onto the DocuWare system, enter https://DocuWare.wrksolutions.com in your web browser address bar. *Save the address on your desktop or as a Favorite on your taskbar.*

1. Leave Organization blank. Enter your Username. Usernames are not case sensitive.

2. Enter your password. Passwords are case sensitive.*

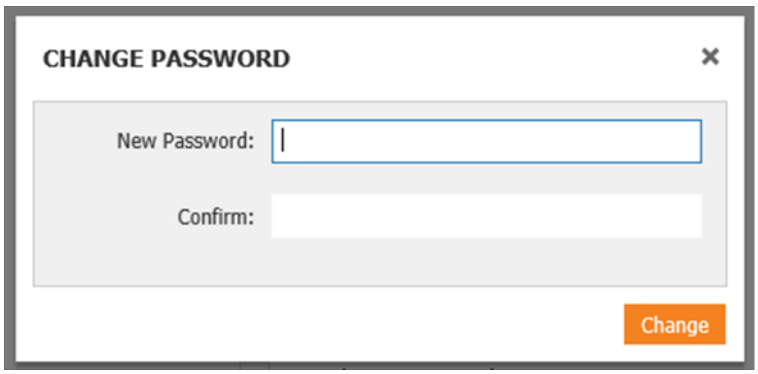
3. Click Login.

You must change your password every 90 days. DocuWare will remind you two weeks prior to that date.



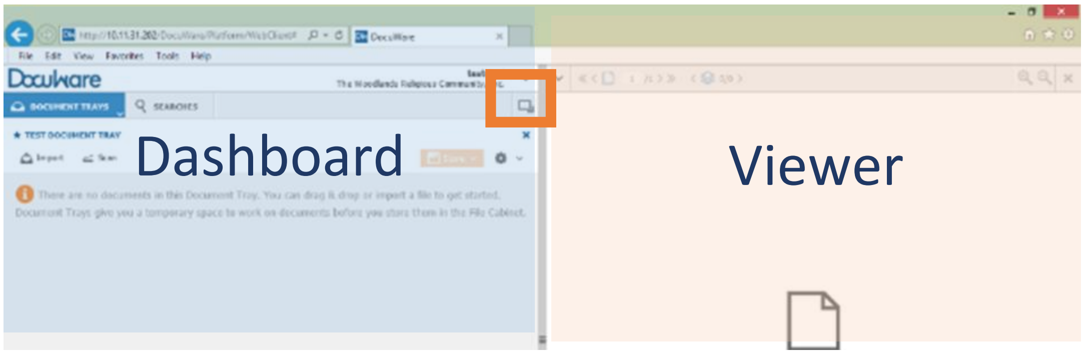
*As a first time user select ">Forgot your password?" to change the setup password.

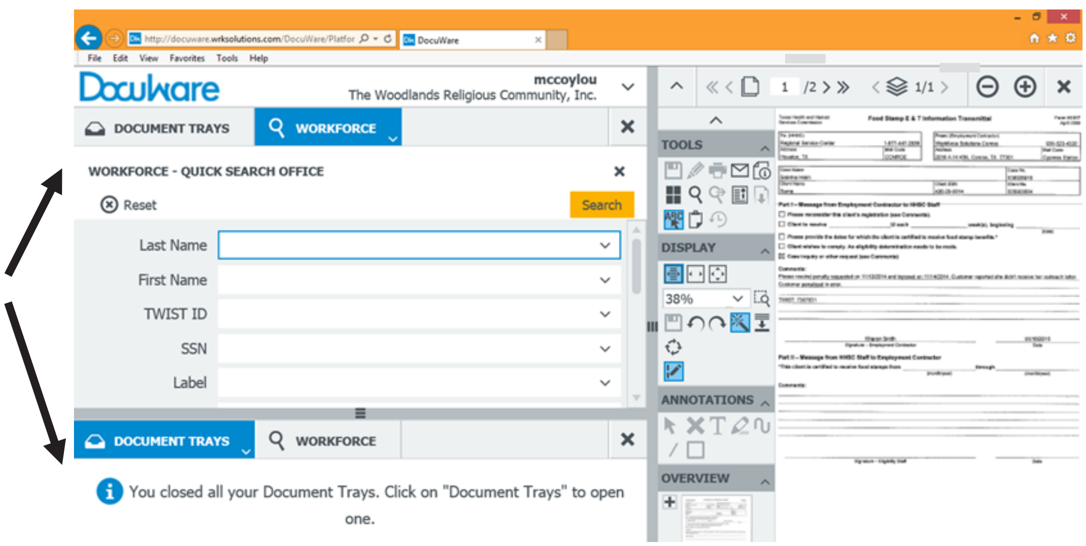
1. Enter your Username.
2. Click Send. DocuWare will send an email link to your wrksolutions email address.
3. Click the link. You will be redirected to a Change Password page.



Your password must be at least six characters long and must contain at least one upper case letter, one lower case letter, and one number. Once your password is changed you'll be prompted to log-on. Enter your Username and Password. Your DocuWare workspace displays. The workspace is unique based on the permissions assigned to you.

You can duplicate your Dashboard by clicking on the Show Split Pane icon at the top right of the Dashboard. This helps when you are storing documents.

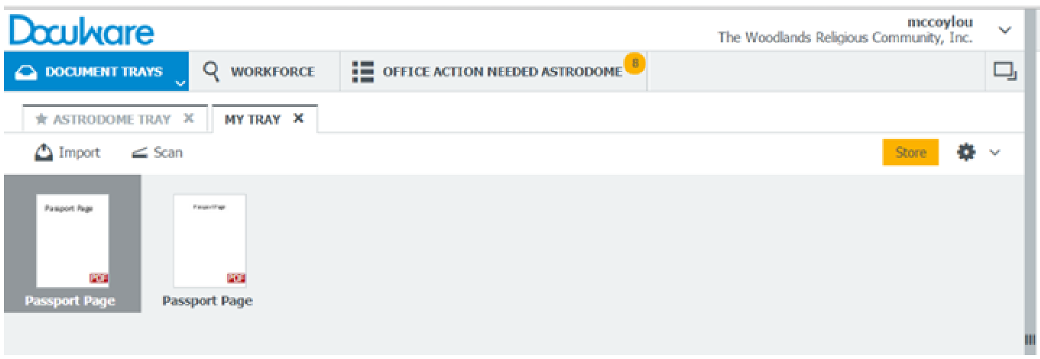




Version 3.9-gc (24), 11/09/16

The Dashboard

Use the Dashboard to store documents, search for records, and view the Office Action Needed List. The tabs at the top of the screen expand, based on your user permissions.



- **Document Trays Tab** – Before a document can be stored it must be scanned, dragged, or imported to a Document Tray. All scanned documents enter DocuWare in Office Tray, while files from a computer can be imported or dragged and dropped into either the Office Tray or 'My Tray'. From here documents are stored and indexed. A document is not accessible to all staff until it is stored. Managers and supervisors also have a Confidential tray. All personal staff documents must be scanned, dragged, or imported into the Confidential tray.

- **Workforce Tab** – The Workforce tab accesses the Workforce File Cabinet and opens your search options. You can perform a search using up to 14 indexes including Name, SSN, and TWIST ID. A document is not in the Workforce File Cabinet or accessible to all staff until it is stored.

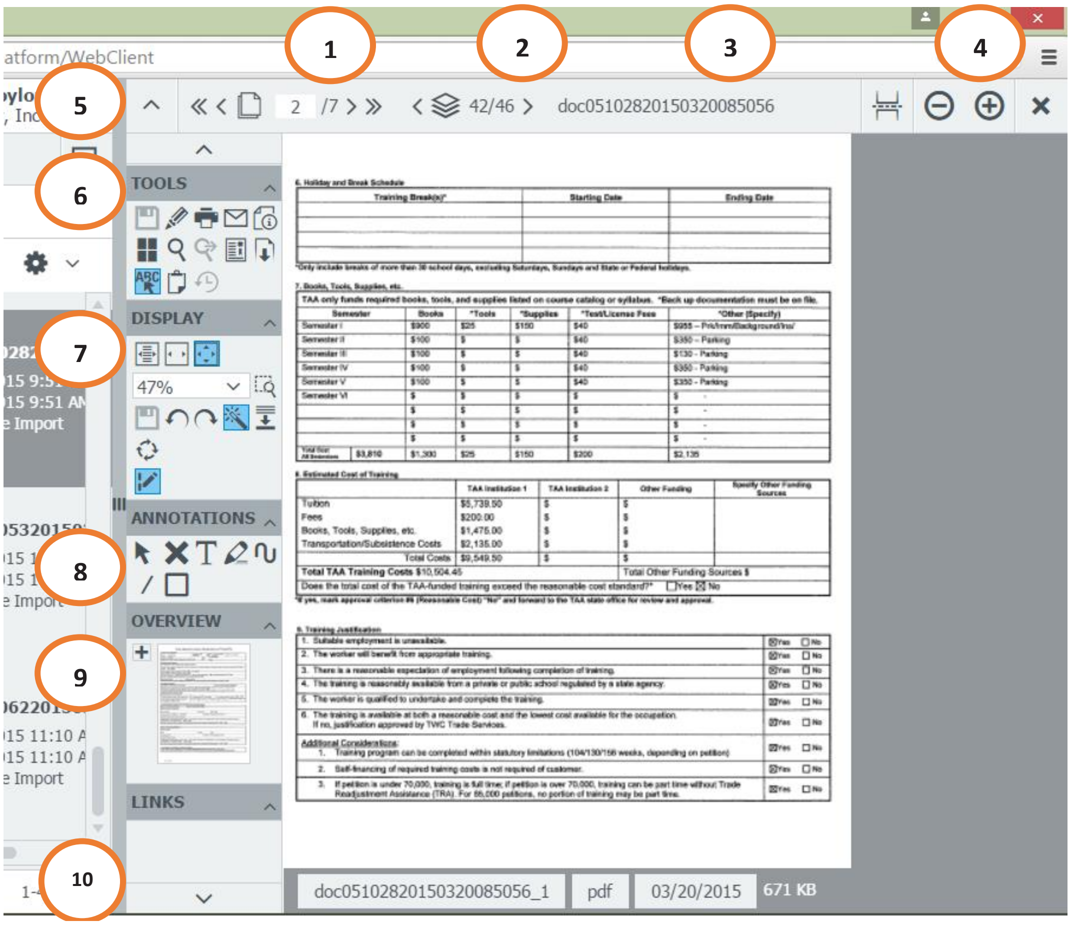
- **Office Action Needed List** – A list of documents which need the attention of office staff before the Tracking Unit or Call Center can take action.

- **Settings** – Change the way you view documents on your Dashboard by clicking on the Settings icon. Click on the arrow next to your name to set up your default settings and to log out.

The Viewer

When you double click on a document on your Dashboard it displays in the Viewer.

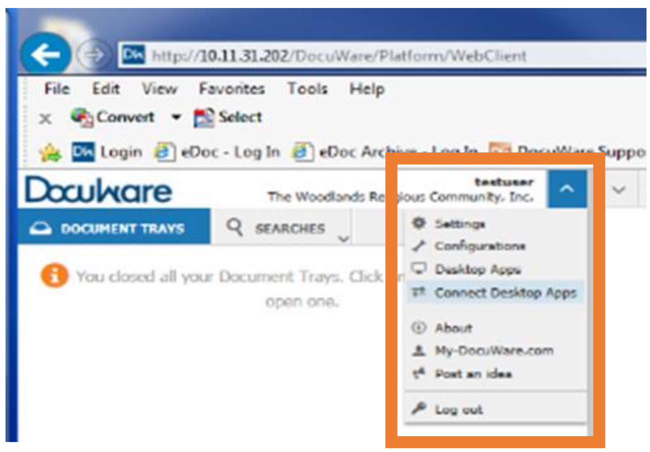
1. Displays the number of pages in the document and the page you are currently on.
2. Displays the number of documents in the List on your Dashboard and the document number of the one you are viewing.
3. Displays the document name. Documents scanned into DocuWare are given a DocuWare number, shown here, and those imported from a computer retain the name of the document as it is stored on the computer.
4. This tool allows you to split the document in two pieces at the current page.
5. This arrow shows and hides the tool bar.
6. Displays tools available to manipulate the document. Tools to note:
    a. Edit Index Entries allows you to change the indexes once the document has been stored
    b. One Click Indexing lets you select text on the document while open in the Viewer to populate index fields when storing the document.
7. Use Display tools to improve the quality of the document.
8. Annotations: DO NOT USE.
9. Overview displays a thumbnail of the first page of the document. If multiple documents are clipped together the first page of each document will display.
10. Links to other documents. For example, click on the TWIST ID link to conduct an automatic search in the Workforce File Cabinet for all documents with the same TWIST ID.


1
2
3
4
5
6
7
8
9
10
atform/WebClient
2 /7
42/46
doc05102820150320085056
TOOLS
DISPLAY
47%
ANNOTATIONS
OVERVIEW
LINKS
doc05102820150320085056_1
pdf
03/20/2015
671 KB

Connect DocuWare Desktop Applications

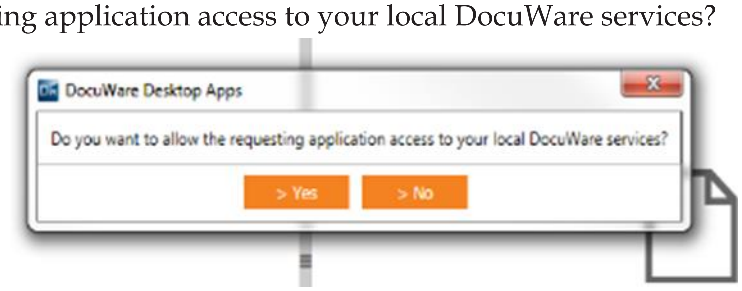
DocuWare provides additional applications (apps) for download that allow actions such as dragging documents directly into DocuWare, using Windows Explorer to manage documents, and importing files directly from network scanners. While the apps are not required to use DocuWare, they make some tasks easier and more efficient. The apps must be downloaded to your computer by your contractor IT department. The first time you log into DocuWare after the apps are installed, you must connect to the apps to use them. If you use multiple computers, repeat the process for each computer you use.

1. Click on the arrow to the right of your user name. A dropdown menu displays.

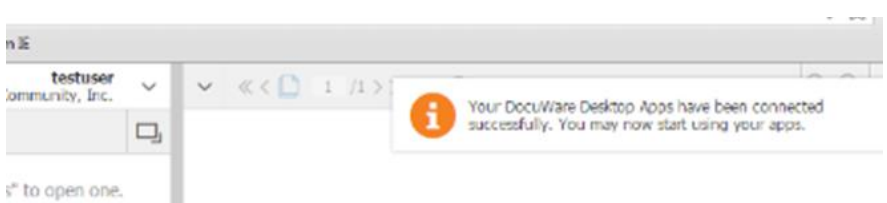


2. Select Connect Desktop Apps from the dropdown menu.

3. A pop-up window displays with the message: Do you want to allow the requesting application access to your local DocuWare services?



4. Select Yes. A pop-up displays acknowledging your successful connection.



NOTES

ENTER DOCUMENTS INTO DOCUWARE

You are ready to begin using DocuWare.

Documents can be entered into DocuWare several ways. The method you use depends on your preference and the method available for a particular document or user:

- Scan from your office scanner
- Import from your computer
- Drag from your computer and drop into the Document Tray
- Managers and supervisors can also scan, import, or drag a document into the Confidential tray.

Scan

The scanner in your office is set up with a selection to scan documents directly into the office document tray in DocuWare. While each scanner is unique, use the following steps as a guide to scan documents into DocuWare. Remember, scanning only puts the documents into the document tray. You must store the document from your computer for it to be accessible by anyone else.

1. Begin by putting the document into the document feeder or on the glass.
2. From the home screen on the scanner, select the designated DocuWare option.
3. Select the type of document you are scanning:
   a. Select Confidential if you are a manager or supervisor scanning documents for internal applicants or their family members.
   b. Select DocuWare for any other documents.

Documents can be one page or multiple pages. The documents go directly into the DocuWare system in a portable document format (.pdf) to the DocuWare Office Document Tray assigned to the scanner used. Confidential documents are sent to the Confidential Office Tray, which only managers and supervisors can view. When scanning documents, remember:

- When you scan multiple documents together, DocuWare handles them as one stapled packet.

- A Financial Aid Application and all supporting documentation is considered one document.
- Cash Sub requests should always be stored separately from other documents unrelated to the cash sub or check request.
- Scan a customer's medical documents separately and Label them Medical, which allows only designated staff to view the documents.
- Managers and Supervisors scan confidential documents, staff or staff family member documents, as separate documents using the Confidential button on the scanner.

IMPORTANT NOTE:

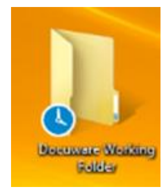
If you have any problems connecting to the system, connecting to your Desktop Apps, or ideas on ways the system could work better for you, please contact your IT department.

Drag and Drop

Set up

DocuWare accepts most common file types such as a Word document, Excel spreadsheet, TWIST letter, picture, or other common types; however, documents manipulated in Microsoft OneNote must be converted to PDF format before dragging them into DocuWare. When you receive an electronic document from a customer, or create one from TWIST, save it to your computer first; then drag it into DocuWare. To work with documents not scanned into the system, set up a DocuWare Working Folder on your desktop to streamline the process.

Set up a DocuWare Working folder on your desktop:



1. Right click on your desktop and select New>Folder.
2. Rename the folder DocuWare Working Folder.
3. Press Enter on your keyboard. Your new folder displays on your computer desktop.

Move files here when you receive them so you can convert them to .pdf when needed and drag them into DocuWare.

Set the default location for downloaded items to your DocuWare Working folder:

1. From your Internet browser select Tools from the menu bar.
2. Click on View Downloads. The View Downloads pop-up window displays.
3. Click on the Options link on the bottom left. The Download options pop-up displays. Change the Default location by clicking on the Browse button and navigating to your DocuWare Working folder on you desktop.
4. Click Ok.
5. Click Close.

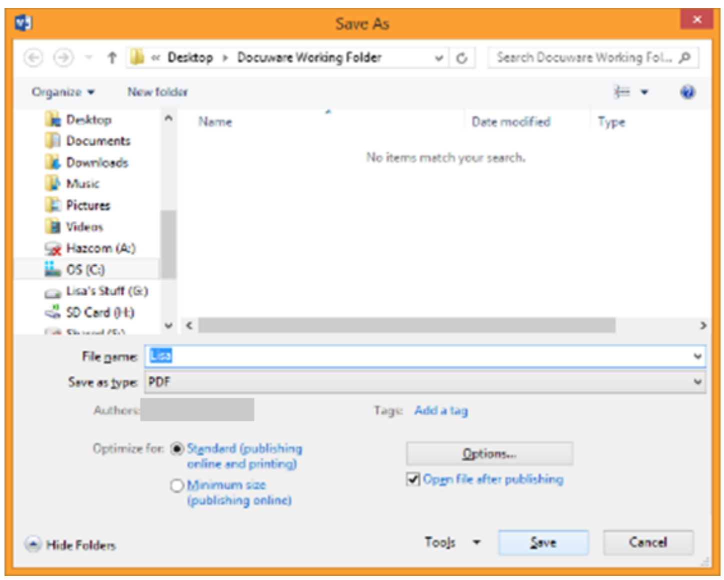
Set Adobe PDF as your default printer:

1. Click on the Windows Start icon on the bottom left of your computer.
2. Select Control Panel and click on Devices and Printers
3. Right click on the icon for Adobe PDF and select Set as default printer.

Convert Microsoft Office files to Adobe files:

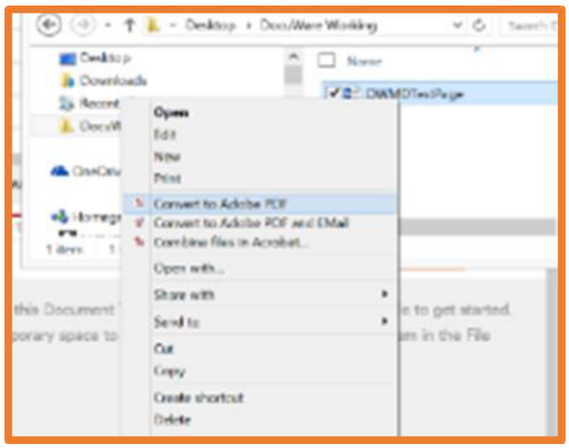
If you do **not** have Adobe Acrobat Pro on your computer,

1. Save the original document to your DocuWare Working Folder.
2. Open the file to convert and select "Save As" from the menu option.
3. Select your DocuWare Working Folder by double clicking on it.
4. Name the document and select "PDF" as the Save as File Type.
5. Save.



If you have Adobe Acrobat Pro on your computer,

1. Save the original document to your DocuWare Working Folder.
2. Right click the document and select "Convert to Adobe PDF."
3. Select your DocuWare Working Folder as the Save As location.
4. Rename the file as needed.
5. Save.



A document can be dragged and dropped into the DocuWare Document Tray. You have access to Document Trays based on your permissions. Career Office staff have access to one shared Tray for the office. Career Office managers and supervisors have access to two Trays -- the Office Tray and a Confidential Tray. Every Customer Tracking Specialist (Tracker) and Call Center staff has an individual Tray called, "My Tray" used to manipulate documents for specific applications and files they are working. There are also additional Trays set up to assist with Call Center and Tracking Unit workflow.

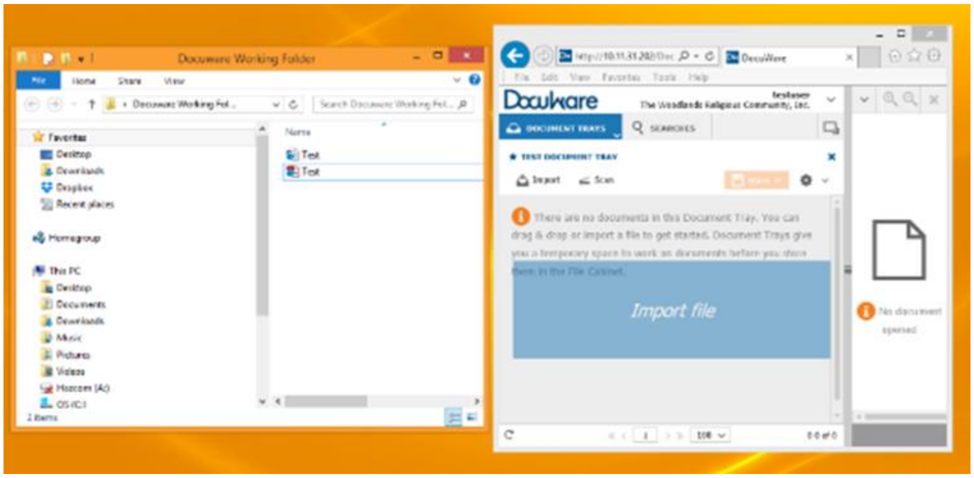
IMPORTANT NOTE:

Financial aid applications and supporting documentation for Workforce Solutions staff and their family members should be scanned and stored into the office Confidential tray in DocuWare by an office manager, only.

To drag a document into a DocuWare Tray:

1. Open DocuWare.

2. Navigate to the file you want to move to DocuWare in Windows Explorer.



3. Click on the file to import. Remember, the file must be in a PDF format to drag into DocuWare.

4. While holding your left mouse button, drag the file to the DocuWare Document Tray until "Import File in the Tray" appears; then release the mouse button.

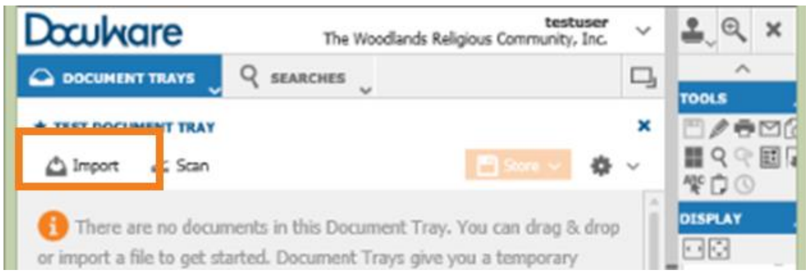
5. DocuWare imports the file and displays it in the Document Tray for your office.

Import

To import files from your computer to DocuWare while in DocuWare:

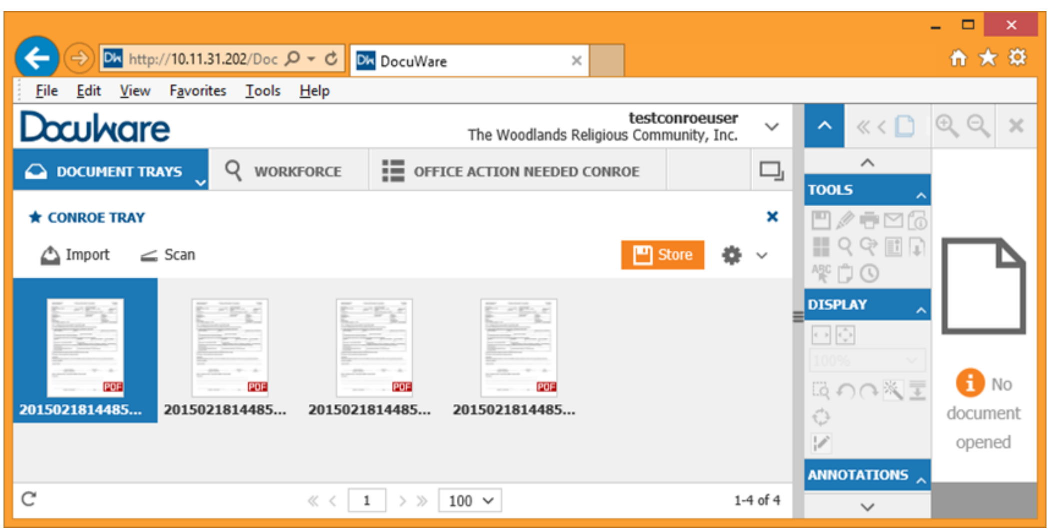
From your DocuWare Dashboard,

1. Select the Document Tray to which you wish to import the file by clicking on the Document Tray dropdown at the top left of your screen. The Document Tray displays.



2. Click Import on the top left of the screen. Windows Explorer opens.

3. Select the file to upload and click Open, or double click on the document. The document uploads to the system and appears in the Document Tray.

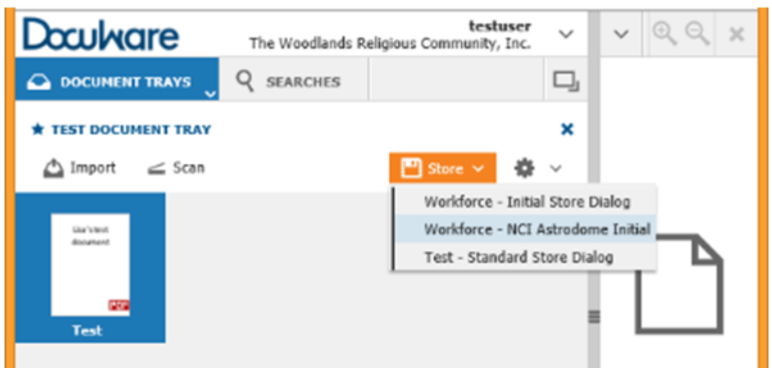


To view documents in DocuWare, simply double click on the thumbnail or record line of the document to open it in the Viewer. You can also right click the line and select Open in New Viewer Window to open an additional Viewer with the document displayed.

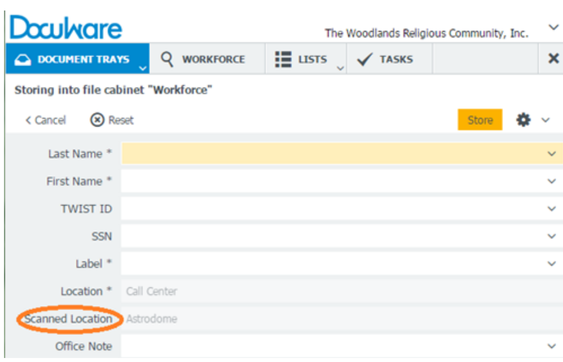
Store Documents

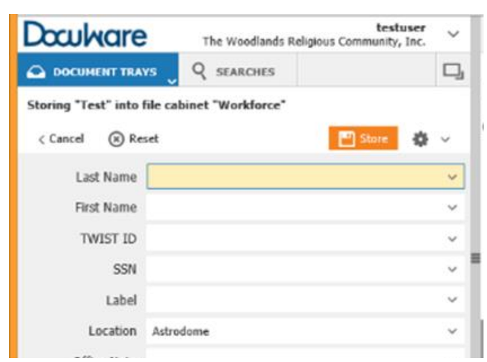
Now that you have documents in DocuWare, you must store them in the DocuWare File Cabinet with the appropriate identifiers or indexes. These identifiers allow anyone to locate the files in the system and they help organize the workflow for the Career Office, the Call Center, FAPO, and the Tracking Units. Once files are stored they cannot be removed and can only be stamped "Deleted" by Call Center or Tracking Unit staff.

1. With the document highlighted, click on the Store button. A dropdown list displays your storage options. Managers and supervisors have the option to store a document as Confidential.



2. Select the appropriate option by clicking on it. The index screen for the File Cabinet displays. If the document was scanned from an NCI customer scanner the index shown below left displays. If a document is entered any other way the index shown below right, displays.





3. Complete all fields.
    a. Last Name and First name are required.
    b. TWIST ID is required appropriate for the customer.
    c. SSN is optional, but complete it if you have it. Enter without dashes.
    d. Label is required. See important note about Labels below.
    e. Location auto populates based on your permissions.
    f. Scanned Location auto populates with the office location when a document is scanned from an NCI career office.
    g. Office Note is for use by Career Office Staff only.
4. Click Store. The document saves in the File Cabinet.

A NOTE ABOUT LABELS:

The Label assigned alerts Call Center or Tracking staff of the document in the system. If the Label is incorrect, the process for approving an application or recording information may be delayed or the document may be missed altogether. Refer to the Appendix for a list of document Labels and an explanation of when to use each. If you make a mistake before saving, remove the Label by clicking on the "X" in the Label field and selecting the correct Label. You cannot change a Label once it has been stored.

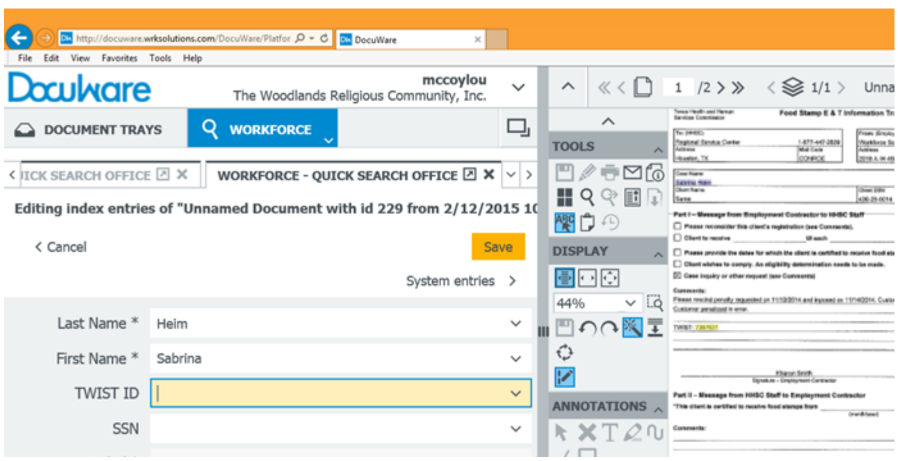
One Click Indexing allows you to complete index fields by clicking on text on the document in the Viewer.

1. Before you select Store, open the document in your Viewer.

2. Click on the One Click Indexing icon on the tool bar.

3. Move your cursor to the text in the document where you want to populate the field highlighted on the Index, and click. The information populates the field.

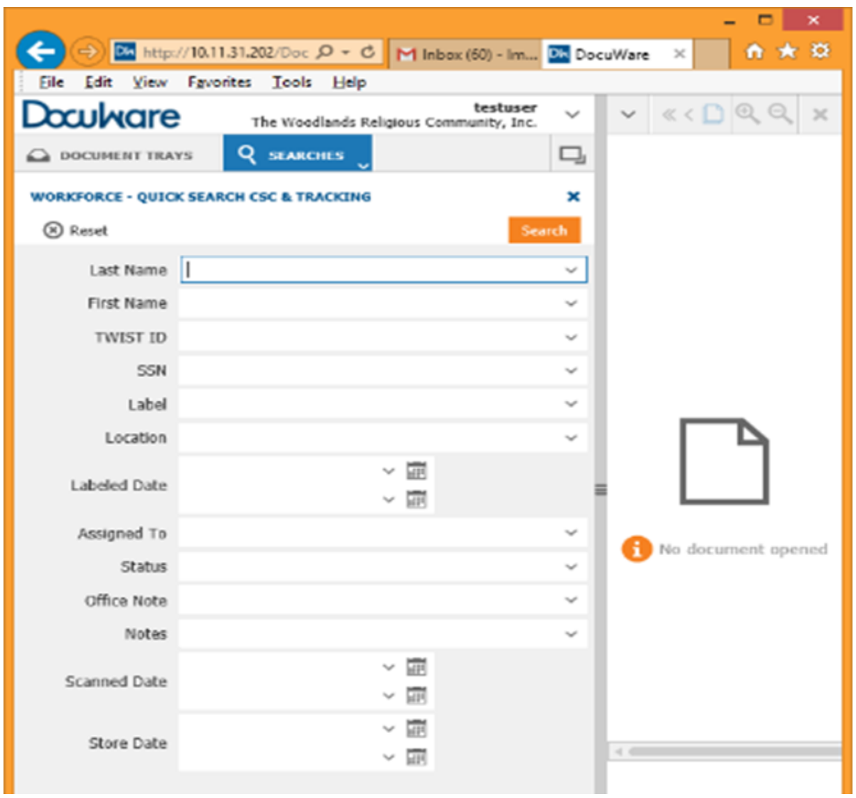
Note: Since the SSN field in DocuWare has only nine characters, a SSN with dashes will not fit the field.



LOCATE CUSTOMER RECORDS

Use the Search tab in DocuWare to locate customer records. DocuWare stores records with up to fifty key indexes which allow you to broaden or narrow your search results. There are two methods to search -- Quick Search and Advanced Search. Quick Searches are set up for different permissions with specific fields available to search. Only staff with certain permissions have access to Advanced Search.

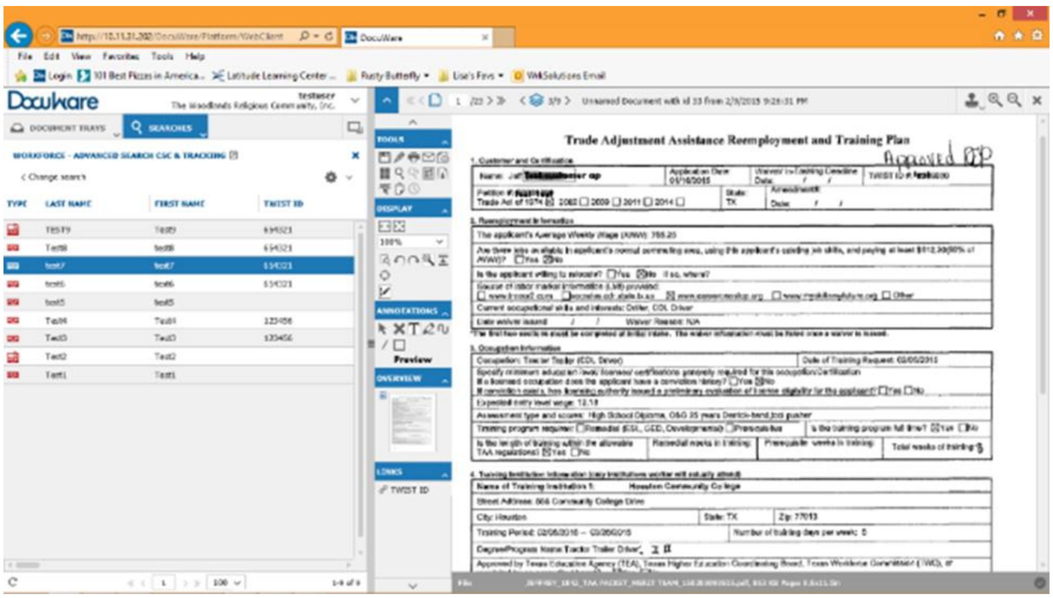
1. Begin your search by clicking on the Searches tab at the top of the screen. The Search screen displays your default search. Click on the Searches dropdown option to choose from the list of your most recent searches.



2. Enter the search criteria you wish to use. You can search using one or multiple indexes. You can search last name and first name with partial information. Other search criteria must be entered completely and accurately. Use an asterisk (*) to indicate missing characters when using search criteria other than name.

3. Double click the line to display the document in your document Viewer on the right side of your screen. You can also right click and choose Open in Viewer. The document displays in the Viewer. Use the arrows on the top left of the Viewer to scroll through the document pages. Use the scroll slider on the bottom of the search window to scroll through the indexes for the search results.

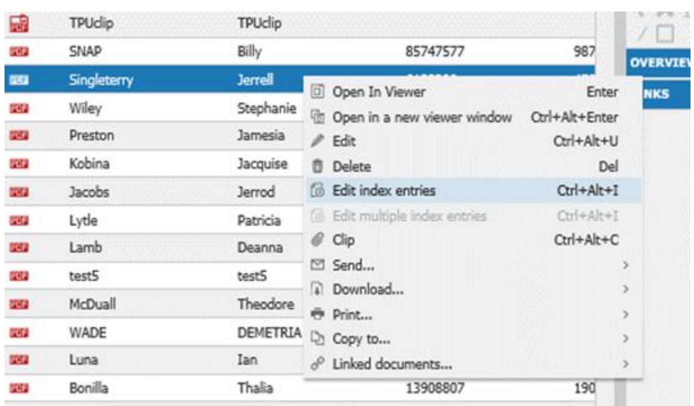
4. To open the document in a new window, right click and choose Open in a New Viewer Window.



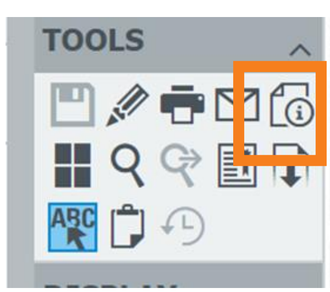
EDIT INDEXES

When you store a document you add information to identify which customer it belongs to and how it should go into the workflow, i.e. is it a new financial aid application for a scholarship or is it a missing document for a customer to continue receiving child care. Occasionally, something will be entered incorrectly or need to be redirected. You can edit the indexes for documents saved in the file cabinet, based on your permissions. Most staff can only edit the First Name, Last Name, TWIST, Social Security Number, and Office Note fields so check with your supervisor if something needs to change which you don't have access to.

1. Select the document to change by clicking on the line.
2. Right click your mouse.
3. Select Edit index entries.
4. Make changes to the fields, as necessary.



If you have the document open in your Viewer, click on the Tool icon Show Index Entries.



IMPORTANT NOTE:

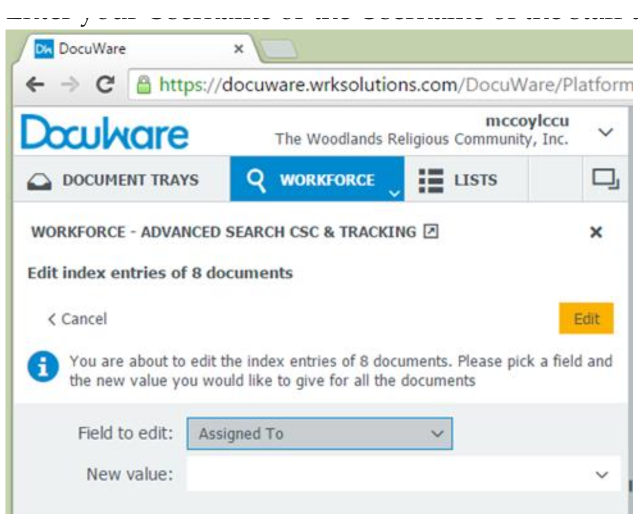
If you discover a customer with multiple TWIST IDs, take the proper steps to have the records merged and notify the Call Center or Tracking Unit of the duplication.

You can use the Edit index entries to assign multiple files to yourself or other staff.

1. Select the document or documents to assign by clicking on the line, or holding the CTRL or Shift key on your keyboard and clicking on multiple lines.

   Note: Hold the CTRL key to select non-adjacent lines and hold the Shift key to select adjacent lines.

2. Right click your mouse.
3. Select Edit Multiple index entries.
4. Select the Index "Assigned To."
5. Enter your Username or the Username of the staff to assign the documents.



ADD NOTES TO A DOCUMENT

Use the Notes Index to communicate with the Career Office. You can add Notes at any time by editing the index fields. To add Notes after a document is saved:

1. Locate the document to which you want to add notes and click on it to highlight or double click to open in the Viewer.
2. Right click and select Edit Index Fields or click on the Edit Index Entries icon in the Viewer toolbar.
3. Click the Notes field. Add comments.
4. Save.

Do not remove notes. Add notes to the end of the previous note.

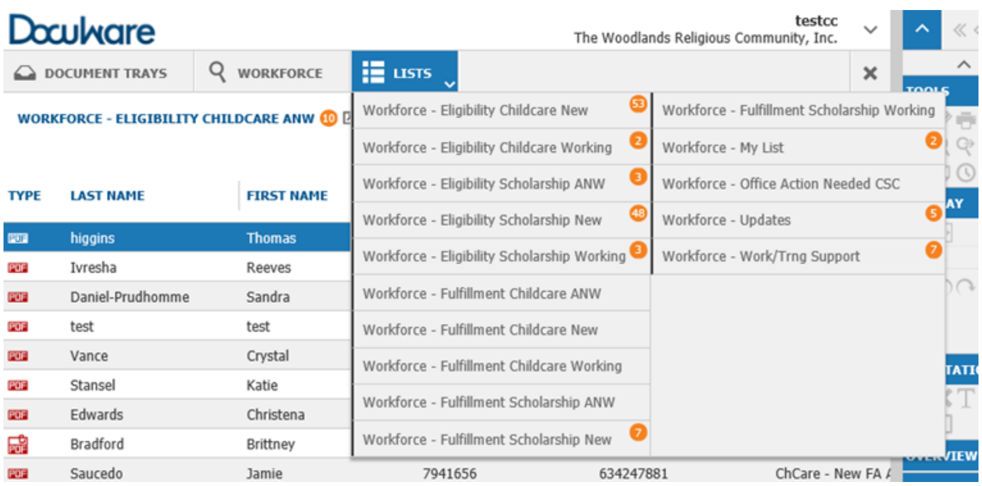
NOTES

LISTS

Lists are used to group documents according to specific Functions or Labels. Lists are defined by the group that will work with the document. Labels and Stamps determine which list a document(s) goes on. There are over forty defined Lists in DocuWare and a “My List” for each Call Center and Tracking Unit staff. Users have access to Lists based on their permissions in the system. For example, a Career Office user has access only to the Office Action Needed List. To view Lists:

1. From your home screen click on the Lists tab. If you have a List or Lists open in the search window it will not display on the dropdown.

2. Select the List to view by clicking on it.



- ELIGIBILITY - Displays a list of documents stamped ‘Ready’ or ‘Not Approved’, waiting on an initial or redetermination of eligibility.

- MY LIST - Displays a list of documents assigned to you or documents you’ve stamped “Work”.

- NEW - Displays new documents requiring action by the designated team.

- RECEIVING - Displays stored documents which the receiving team staff must review to verify the documentation is present for an eligibility determination to be made. Once reviewed the item is stamped ‘Ready’ which moves it to the Eligibility list.

- UPDATES - Includes items such as updated school schedules, certain OAG information, suspensions, suspension updates, new job, etc. Sometimes there are updates that need to go to eligibility staff and cannot be worked by fulfillment.

- WORK/TRNG SUPPORT - The Work/Trng Support List includes cash subs, but is not exclusively cash subs. These documents require immediate attention and must be completed on the same day if FAMS data entry is required for Career Offices to balance their card inventory. Documents on this List will typically be assigned to staff to work to ensure cards are entered and Chase cards are loaded timely.

- OFFICE ACTION NEEDED CSC - The Office Action Needed List is a shared List which displays documents previously stamped Office Action Needed by the Call Center or Tracking Unit. "Office Action Needed" indicates a document requires action by Career Office staff for the Call Center or Tracking Unit to move it through the workflow. When corrections are made, the Career Office staff will enter an Office Note to notify the Call Center or Tracking Unit. They will also enter TWIST notes, when applicable. Once the Career Office takes the needed action you must remove it from the List by using a Stamp – "File" to retain the document, or "Delete" if the original document is not needed. This changes the status of the Document.

WORKING IN THE DOCUMENT TRAY

The Document Tray is where documents "land" before they are stored in the File Cabinet. The Call Center or Tracking Tray is a public area where scanned documents land before they are stored. Anything in an Office Tray is not visible by staff outside of your office or group (Tracking Unit or Call Center). My Tray is a private Tray you can use to manipulate documents without other documents getting in the way. Always clear the Tray by storing documents before moving to your next task.

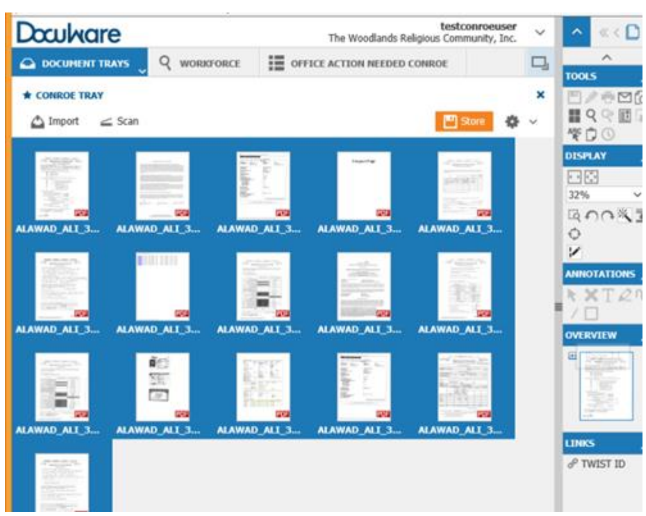
Combine and Separate Documents

Once documents are in your Document Tray you can manipulate them in a number of ways. Multiple documents (scanned together) enter the Tray as a "Stapled" packet. When .pdf documents/packets need to be separated so they can be stored as individual documents, use the Unstaple/Staple functions or Adobe Pro to separate and put together pages. Only .pdf files can be manipulated using the Unstaple/Staple function.

Unstaple and Split

1. Right click on the document in your Tray.

2. Select Unstaple. The pages are separated in the Tray



You can also separate documents using the Split tool. Splitting a document separates it into two sections at the point the split is made. To split a document:

1. Open the document in the Viewer.
2. Navigate to the page you want to be the first page of the split.
3. Click the Split tool on the top right of the Viewer.
   The document splits and displays as two documents in your Tray. The second document will have the same name as the first with (2) after it.

4. Store each document with the appropriate indexes.

Staple

Stapling documents together creates a single new document which you can store with new indexes. Original indexes are retained in the copied document unless you change them. You can only staple together files in .pdf format.

Use the staple function to connect pages of .pdf documents in your Tray.

1. Click on the page you would like to appear first in the document.
2. Hold down the CTRL button on your keyboard.
3. Continue holding the CTRL button down, and click on subsequent pages in the order they should be in the documents.
4. Release the CTRL button.
5. Right click.
6. Select Staple. The stapled document appears in your Tray.
7. Store the document with the appropriate Indexes.

Staple Two Documents Not Yet Stored

1. In your Document Tray hold down the CTRL key on your keyboard and click on each page in the order you want them to appear.
2. Release the CTRL key.
3. Right click within the highlighted section and select Staple.
4. Double click on the document highlighted to view the pages in the packet.
5. Store the document using the appropriate Labels.

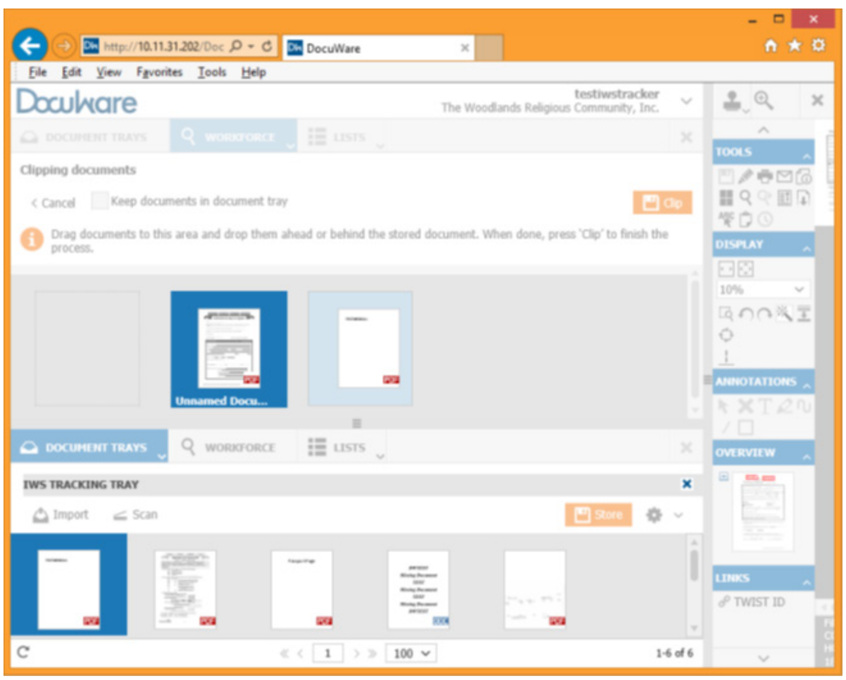
Add a Page to the End of a Document in the Tray

1. Import the page to add into your Tray.
2. Select the document in your Tray you wish to add the page to
3. Hold down the CTRL key on your keyboard and click on the new Page.
4. Release the CTRL key.
5. Right click within the highlighted section and select Staple.
6. Double click on the document highlighted to view the pages in the packet.
7. Store the document using the appropriate Labels.

Join a Document in the Tray With a Stored Document

New items received which relate to a customer's application/file should be part of documents already stored in DocuWare. To join the items:

1. With DocuWare in split-pane mode, search for the existing stored document,
2. Left click and drag the new document over the existing document (Works best when top left corner of new document touches line of stored document)
3. Release mouse button. A confirmation pop-up displays.
4. Click Store. The indexes of the stored document are copied to the new item.
5. Verify and/or change appropriate indexes.
6. Click Store. The document will be placed on the appropriate list for processing.



Use Adobe Pro to Manipulate Documents (Call Center Only)

Call Center staff have Adobe Acrobat Pro software which allows them to take a document out of DocuWare, edit it, and save it back into DocuWare. This is helpful when financial aid application missing documents are stored in DocuWare and when a document must be rescanned.

Join Two Stored Documents

1. Locate the document for which you do not need to maintain the indexes.
2. Right click, select Download PDF with Annotations. Document will download into your Docuware working folder.
3. Delete the downloaded document from DocuWare. Double click the document to open it. Stamp it Delete with the reason, Duplicate.
4. Locate the document for which you wish to maintain the indexes. Note: Use this method only if the document has a status of Labeled or Denied. Right click and select Edit. The document will open in Adobe Pro.
5. Select thumbnail view and drag the first document into Adobe PRO.
6. Arrange documents in proper order, deleting any unnecessary pages.
7. Select File, Click Save. The manipulated document is returned to DocuWare.
8. Delete the document from your working folder.

Separate Items from a Document

Core documents such as birth certificates, social security cards and other I-9 documentation should be separated from other documents in a customer's financial aid packet and stored in DocuWare for future use. To do this:

1. Select the document in DocuWare.
2. Right click, select Download as PDF without Annotations. The document will download into your DocuWare working folder.
3. Open the document using Adobe PRO and select thumbnail view.
4. Delete any non-core documents.
5. Select File, click Save.
6. Drag the saved document into My Tray in DocuWare.
7. Store with the appropriate indexes, use proper Proof of label.

USING STAMPS TO MANAGE DOCUMENTS

Stamps are used to identify the status of a document in the workflow. All Stamps display the username of the staff who applied the Stamp and a time stamp. Stamps should be applied to the first page of a document in a blank area when possible. Once a Stamp is applied, there is no way to remove it. Each Stamp affects a document differently.

- APPROVED: The Eligibility Team has determined the customer as eligible. The Approved stamp moves the document to the List for the Fulfillment Team to work.
- APPROVED-FILE: Indicates the Eligibility Team has determined the customer as eligible but the file doesn't need to be fulfilled. For example a Financial Aid application for scholarship when the Cost Obligation form has not been received or when school begins later.
- CONFIDENTIAL: Moves a document to the Confidential area in DocuWare. It puts the document on a List only staff with management permissions can view.
- DENY: Indicates the Eligibility Team has determined the customer ineligible. Staff will be prompted to choose the reason the application is denied. Choose one of the options from the dropdown, or type in your own reason.
- DELETE: Designates document that need to be removed from DocuWare, i.e. duplicates, unneeded documents. Stamping a document with the Delete Stamp doesn't actually delete the file, it removes it from basic searches. When this Stamp is used you must provide a reason for deleting the document before you can Stamp.
- FILE: Indicates tasks related to a document have been completed and the document is ready to be filed. Documents stamped "File" do not move to another List. For example: a cash sub has been entered in FAMS and TWIST.
- FULFILL: When an application has been completed by the fulfilment team the document is stamped "Fulfill" to establish a completion of the process. When a document is stamped "Fulfill" is it filed.
- MOVE: Use Move when a document needs to move to a different List, but needs to retain its original Label.

Version 3.9-gc (24), 11/09/16

- NOT APPROVED: Used by the Fulfillment team to indicate an approved document needs to have the calculations used to make an eligibility determination reviewed for accuracy. Using this stamp returns the document to the list of the staff who stamped the document Approved.

- NOT READY: Used when a document makes it to the Eligibility team but does not have all the documentation needed to make an eligibility determination. Using this stamp begins the denial process for the application and returns it to the Receiving team to review, attempt to retrieve missing documents, or deny the application.

- OFFICE ACTION NEEDED: Used when Career Office staff must take action or provide more information for a document to be processed, i.e. signature needed, missing pages for cash subs or Job Search Logs. This Stamp moves the document to the Office Action Needed List. Marking a document "Office Action Needed" is a two part process:

  1. Stamp the document "Office Action Needed."

  2. Edit Index Entries to add Notes telling the Career Office what needs to be done.

  Using this stamp requires a follow up action on your part once the Career Office has taken the needed action.

- READY: The document contains all required forms and documentation for an eligibility determination to be made.

- RELABEL: Use the Relabel Stamp when a document is stored with the incorrect Label, for example when an application is labeled for Child Care but should be for Scholarship.

- WORKING: Alerts other staff working on the file by changing the status to "Working."