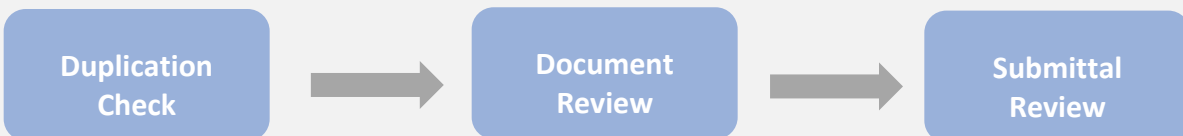


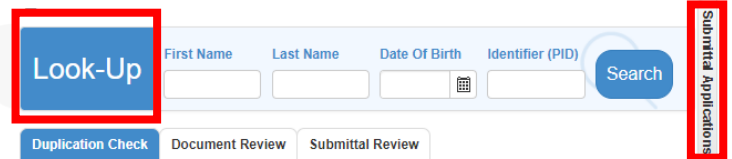
## Summary

Use the Documents Management page to manage duplication, reviewal and submittal of documents. Document Managers will use the Document Management page, Duplication Check tab to find pending client records and check for duplication. Use the Submittal Review tab of the Document Management framework to review application details and to approve or deny an application.



## Duplication Check

- On Duplication Check Tab, use **Look-Up** to search for a client's application or open **Submitted Applications** Quick Access menu
- In popup window, select search criteria
  - Click **SEARCH**
  - Matching records will be displayed in grid
  - Select record to use
  - More information about this record is available by scrolling to the right in the grid, including current Statuses
  - Use the arrows on the page to scroll through all the displayed records
- Selected record will be displayed.
  - Click on **CHECK** to run a search for any duplicated accounts
    - **Replace By** will appear and list either **No Duplication** or list **Duplications**
    - Click on **X** to remove duplication results
  - If the system finds potential duplicates, a popup appears that prompts you to review those

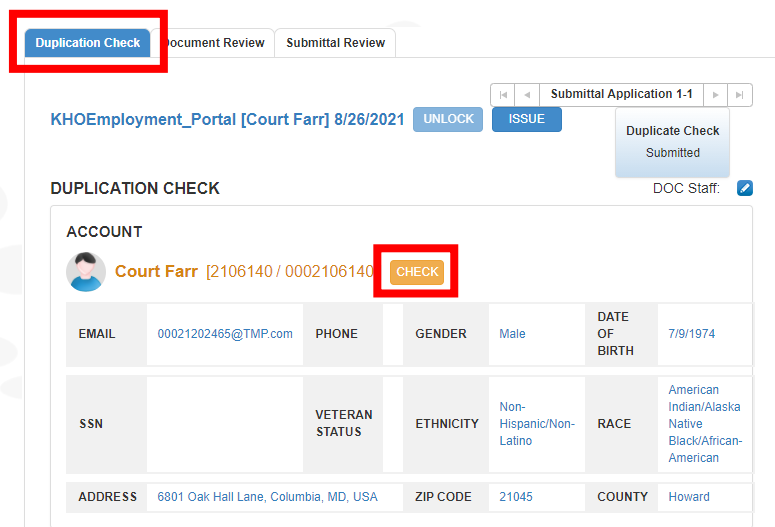


Look-Up

First Name Last Name Date Of Birth Identifier (PID) Search

Duplication Check Document Review Submittal Review

Submitted Applications




Duplication Check Document Review Submittal Review

KHOEmployment\_Portal [Court Farr] 8/26/2021 UNLOCK ISSUE Duplicate Check Submitted DOC Staff: [checked]



DUPPLICATION CHECK

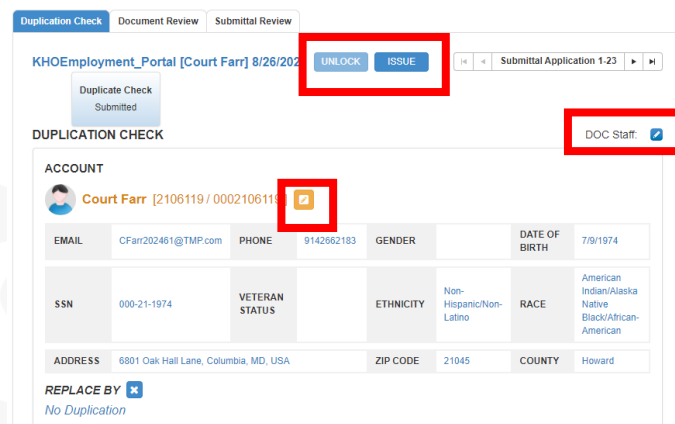
ACCOUNT

 Court Farr [2106140 / 0002106140] **CHECK**

EMAIL	00021202465@TMP.com	PHONE	GENDER	Male	DATE OF BIRTH	7/9/1974
SSN		VETERAN STATUS	ETHNICITY	Non-Hispanic/Non-Latino	RACE	American Indian/Alaska Native Black/African-American
ADDRESS	6801 Oak Hall Lane, Columbia, MD, USA		ZIP CODE	21045	COUNTY	Howard

duplicates and process as needed. In this case, select the appropriate menu option and click **PROCESS**

- In the event
- After Duplication Check has been submitted, you may click on the  next to the account owners name to edit the Identifier number
- Click on **UNLOCK** to unlock Submittal Application
  - Clicking **YES** to Unlock Submittal Application, will remove application from Document Management page
- Click on **ISSUE** to record any issues with the clients account
  - In the popup window, input the issue with selected account(s)
  - Click **SAVE**
- Click on  near **DOC Staff** to select Staff name from dropdown that completed the Duplication Check




KHOEmployment\_Portal [Court Farr] 8/26/2021


UNLOCK ISSUE

Duplicate Check Submitted


DUPLICATION CHECK

DOC Staff 

ACCOUNT

 Court Farr [2106119 / 0002106119]

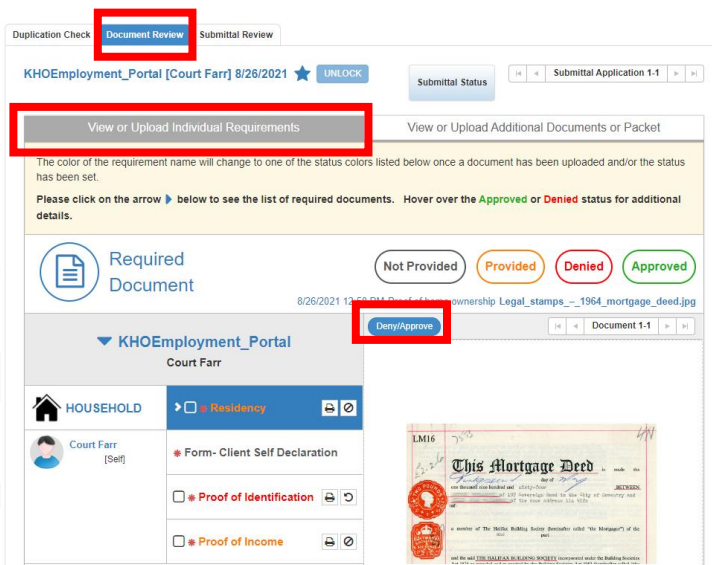
EMAIL	CFarr202461@TMP.com	PHONE	9142662183	GENDER		DATE OF BIRTH	7/9/1974
SSN	000-21-1974	VETERAN STATUS		ETHNICITY	Non-Hispanic/Non-Latino	RACE	American Indian/Alaska Native Black/African-American
ADDRESS	6801 Oak Hill Lane, Columbia, MD, USA		ZIP CODE	21045	COUNTY	Howard	

REPLACE BY  No Duplication

**NOTE: Use the Submittal Application toggle arrows to view other account applications.**

## Document Review

- On Document Review Tab, use **Look-Up** to search for a client's application or open **Submitted Applications** Quick Access menu
- In popup window, select search criteria
  - Click **SEARCH**
- Client's account with document status will be displayed under the **View of Upload Individual Requirements** section
  - Gray- Not Provided
  - Orange – Provided
  - Red – Denied
  - Green – Approved




Duplication Check **Document Review** Submittal Review

KHOEmployment\_Portal [Court Farr] 8/26/2021 UNLOCK

Submittal Status Submittal Application 1-1

View or Upload Individual Requirements View or Upload Additional Documents or Packet

The color of the requirement name will change to one of the status colors listed below once a document has been uploaded and/or the status has been set.

Please click on the arrow  below to see the list of required documents. Hover over the **Approved** or **Denied** status for additional details.




Required Document





Not Provided Provided Denied Approved

8/26/2021 12:00 PM Court Farr Residency Legal\_stamps\_-\_1964\_mortgage\_deed.jpg

Deny/Approve




KHOEmployment\_Portal Court Farr

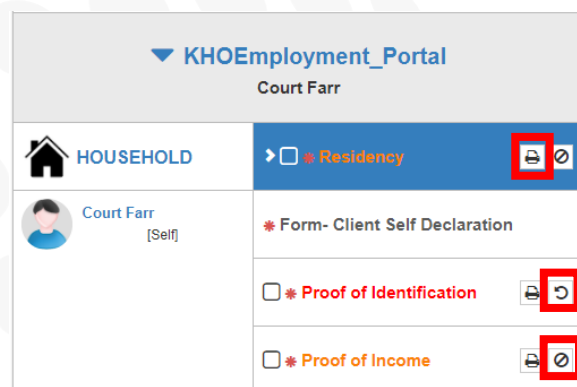
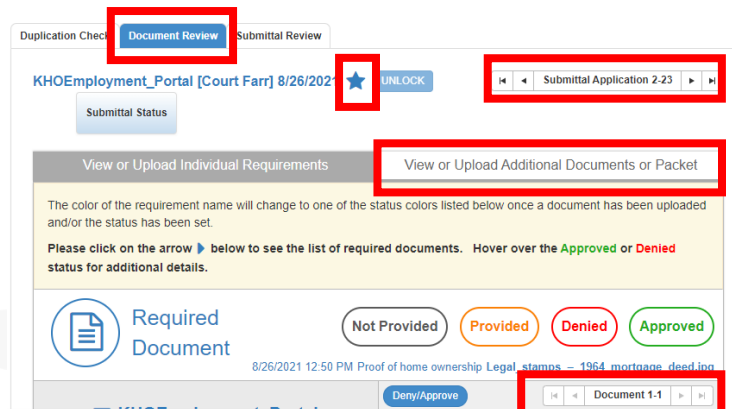
HOUSEHOLD  Residency  

- \* Form- Client Self Declaration
- \* Proof of Identification  
- \* Proof of Income  

LM16

This Mortgage Deed

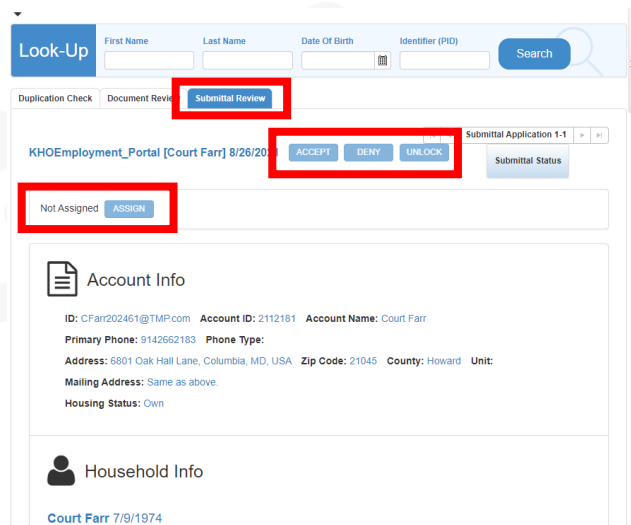
- Click on Document type to view Documentation
  - Click on **Deny/Approve**
  - If Deny, select Reason from dropdown and enter a comment then click **SAVE**
  - If Approve, select **Approve** and click **SAVE**
- Use the Submittal Application toggle arrows to view other account applications
- Use the Document toggle arrows to view other uploaded documents within that document type
- Click on ★ next to Application name to view **Submittal Application Details**
- Click on  to **Print** documentation
- Click on  to **Deny** documentation and enter requested criteria
- Click on  to **Undo** Denied documentation
- Use **View or Upload Additional Documents or Packets** section to upload client documents all at once
  - Client will not be able to view uploaded documents under this section



**NOTE: Required documents will be marked with a red asterisk \***

## Submittal Review

- Locate a Client using the **Look-Up** search function at the top of the page or use the **Submittal Applications** Quick Access menu
- Once client account is located, review application details
- After review, if all submittal details are acceptable, then click **ACCEPT**
  - If not, then click **DENY**
- If a submittal has already been accepted, but changes need to be made, click **UNLOCK**





- **UNLOCK** is available when Application Status = Submitted
  - After an application is accepted, then a Case Manager can be assigned
    - Click **ASSIGN** and select from the dropdown list
    - Click **SAVE** when finished
-