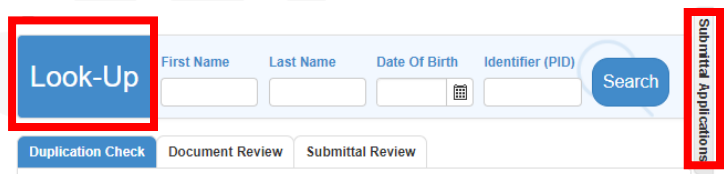
# Document Management

## Summary

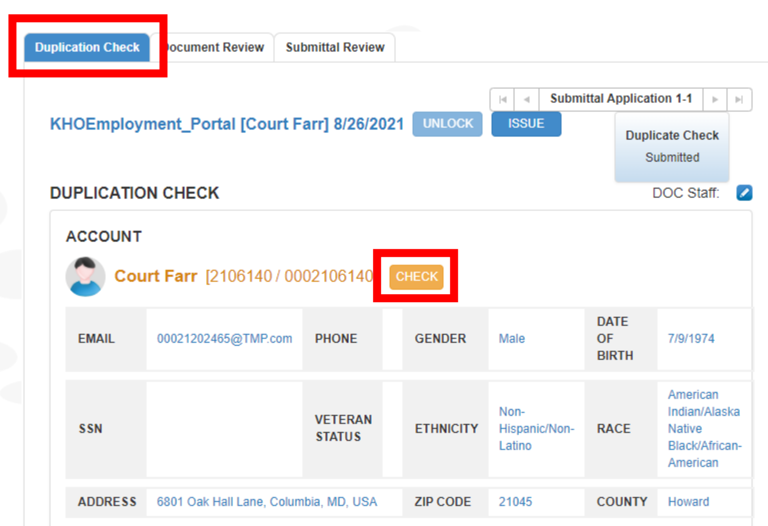
Use the Documents Management page to manage duplication, reviewal and submittal of documents. Document Managers will use the Document Management page, Duplication Check tab to find pending client records and check for duplication. Use the Submittal Review tab of the Document Management framework to review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

Duplication Check → Document Review → Submittal Review

## Duplication Check

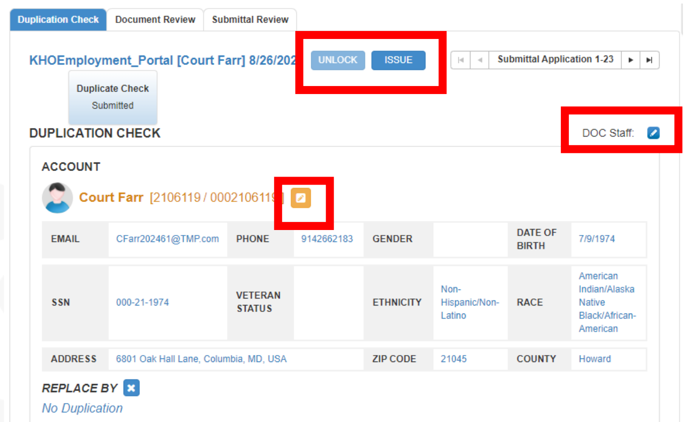



- On Duplication Check Tab, use **Look-Up** to search for a client's application or open **Submitted Applications** Quick Access menu
- In popup window, select search criteria
  - Click **SEARCH**
  - Matching records will be displayed in grid
  - Select record to use
  - More information about this 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 to remove duplication results
  - If the system finds potential duplicates, a popup appears that prompts you to review those



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




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

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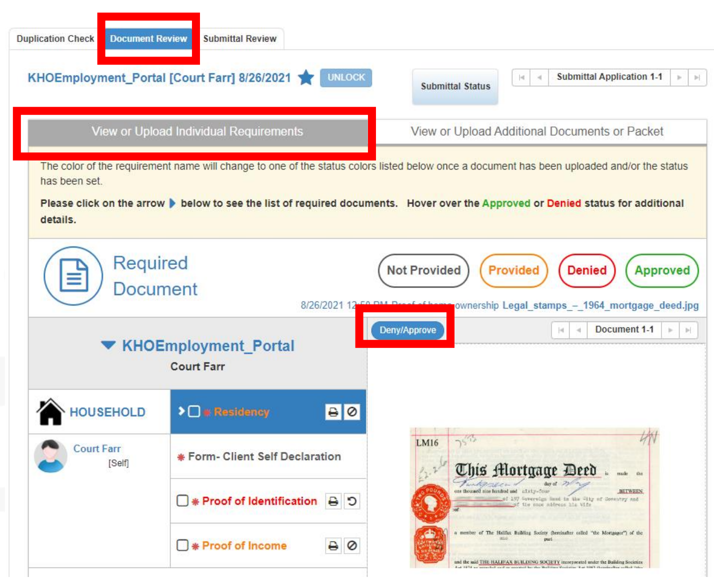
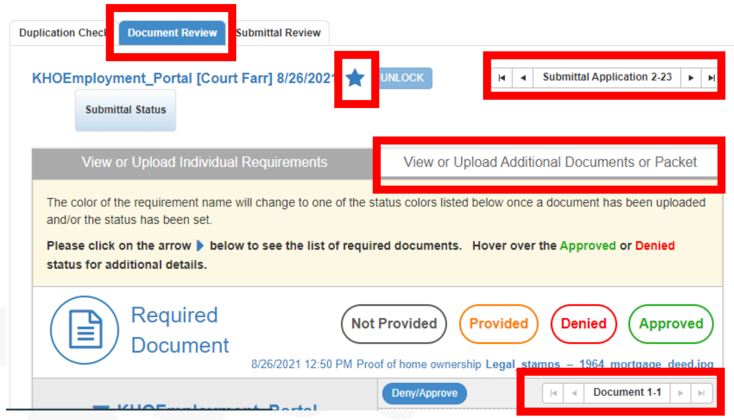
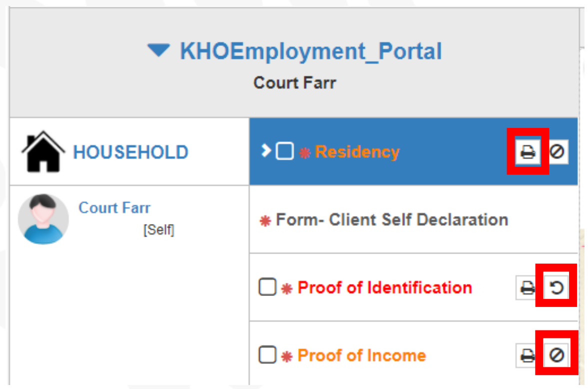
# Document Review

- 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






- 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 ***

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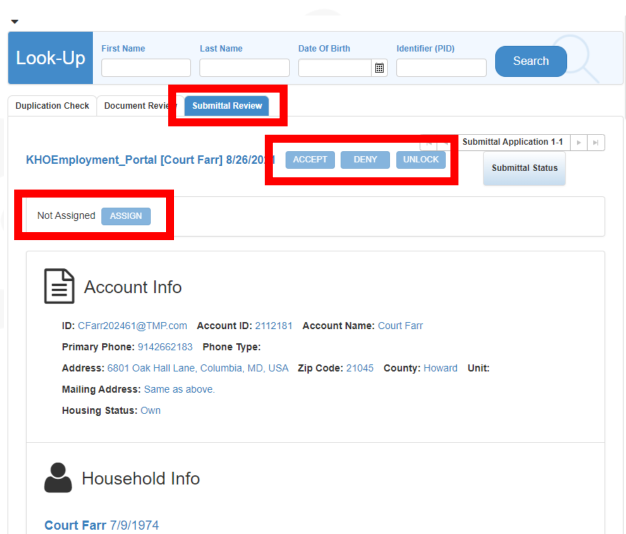
# Submittal Review

- 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

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