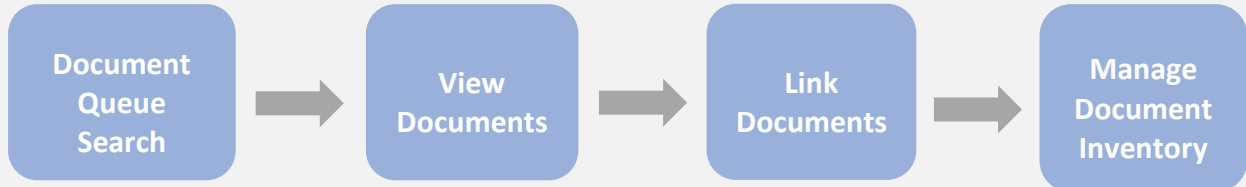


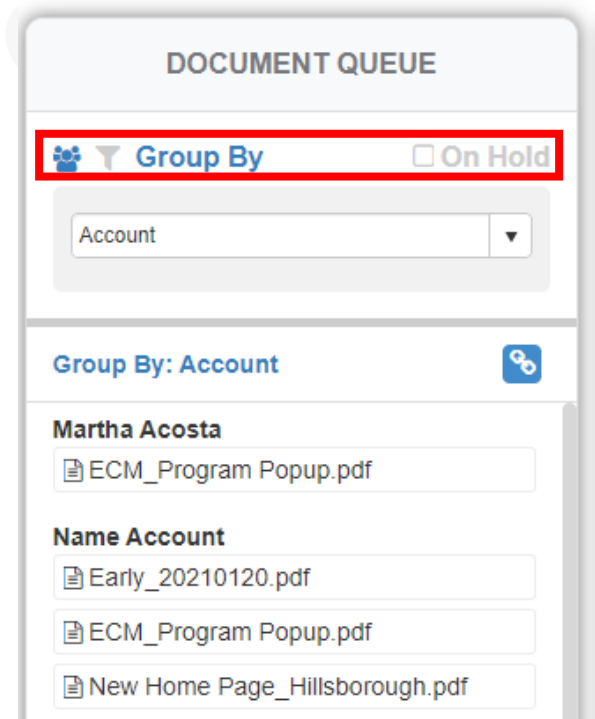
Summary

Use the Documents Queue page to view, link and organize portal documentation. Document Managers are able to search for documents by Grouping and Filtering. Documents can be link to an Individual or Household.



Document Queue Search

- On Document Queue page, search for documents in the **Document Queue List**
 - Not Link and Linked documents will be displayed
- Click **GROUP BY** to search by Group
 - Account
 - Date
- Click **FILTER** to filter by
 - Folder
 - Doc Manager
- Click **ON HOLD** to search documents placed on Hold



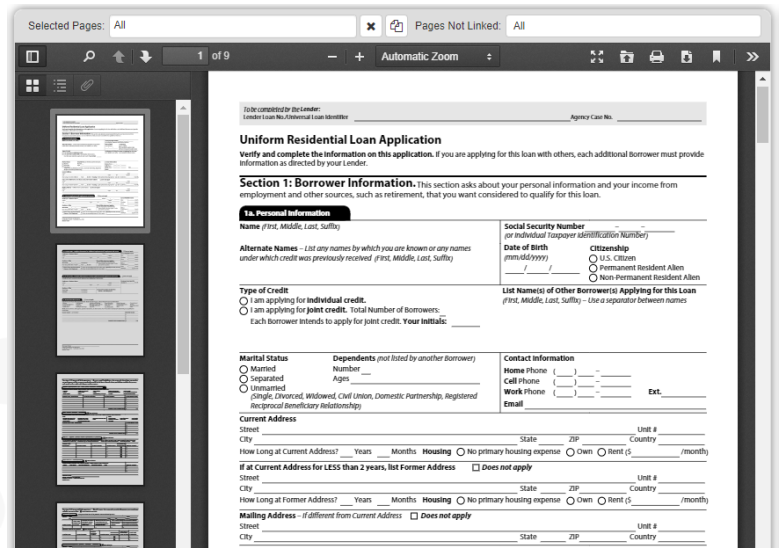
NOTE: ON HOLD documents can be selected by itself or used with GROUP BY and FILTER

View Documents



- View Document Images on the center of Document Queue page

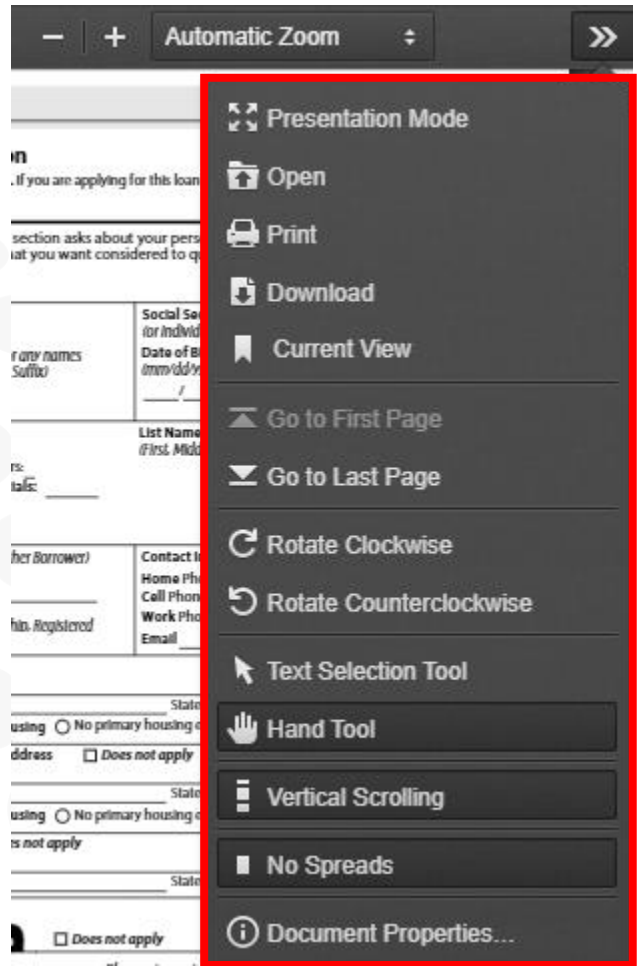


- Use **SELECTED PAGES** to select All pages or specific pages
 - Use the dropdown to select multiple pages
 - Click on to **Clear** selection
 - Click on to **Split** selected documents from rest of documents shown
 - **PAGES NOT LINKED** will be displayed in field
- Use the **Toggle Sidebar** for overview of all pages
 - Click to view **Thumbnails**
 - Click to show **Document Outline**
 - Click to show **Attachments**
- Use the to **FIND** word matches
 - Select criteria:
 - Highlight All
 - Match Case
 - Whole Words
 - Use **Left and Right Arrows** to view Previous and Next occurrence of word or phase
 - Use the **Up and Down Arrows** to view previous or next page
 - Enter page number in the Page Field to view a page quickly
 - Use to **Zoom In and Zoom Out** of Document












- Select from dropdown of **Automatic Zoom** for preset views
- Use  to **Copy or Open In A New Window**
- Click on  for **Tools** to
 - Presentation Mode
 - Open
 - Print
 - Download
 - Current View
 - Go to First Page
 - Go to Last Page
 - Rotate Clockwise
 - Rotate Counterclockwise
 - Text Selection Tool
 - Hand Tool
 - Vertical Scrolling
 - No Spreads
 - Document Properties



Link Documents

- Select a document from the **Document Queue List**
 - **Not Link Documents** will have an empty box icon  before the document name
 - Hover over  to click on  to **DISCARD** document or  to place document on **HOLD**
 - **Linked Documents** will have a document icon  before the document name
 - Hover over  to click on  to **Lock** and remove

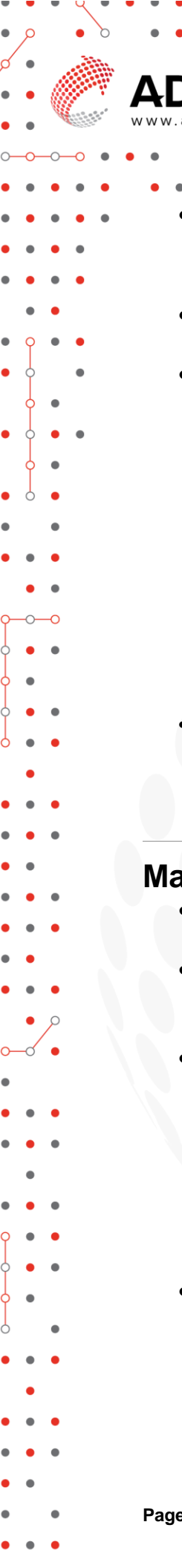
Group By: Account Filt... 



- DemographicInformation...
- EA-1-Application-for-the-...
- Early_Head_Start_Annua...

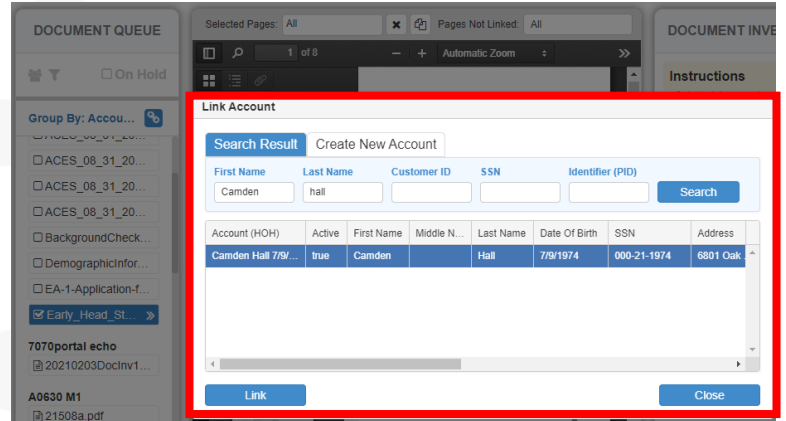
Group By: Account Filt... 

Camden Hall


- URLA_2019_Borrower... 

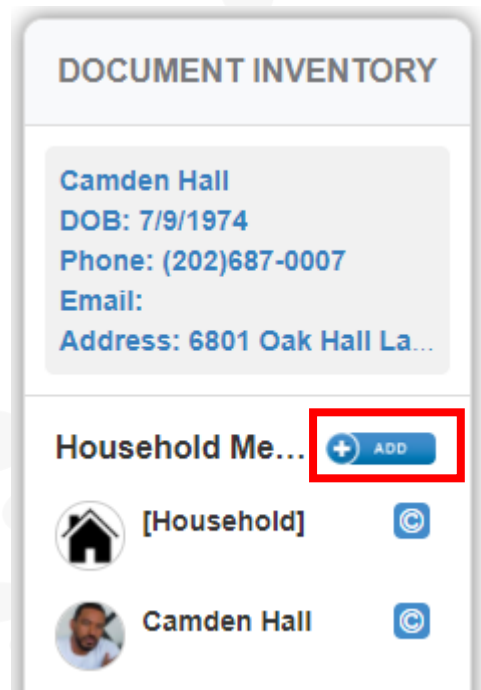


- document from queue or click on  to **Undo Link**
- Selected document will have a box with a checkmark before the document name
- Click on  to **Link** the document to the selected account
- In **LINK ACCOUNT** popup window search for account
 - Enter Account Information
 - First Name
 - Last Name
 - Customer ID
 - SSN
 - Identifier (PID)
 - Click **SEARCH**
 - Select Account from search results
 - Click **LINK**
- The selected account has been added to the **Document Queue List** with the Linked document




Manage Document Inventory

- Select document from the **Document Queue List**
- Selected document **Contact** and **Household Members** information will display under **Document Inventory**
- Click on **ADD** to Add **Household Member**
 - In **Add Member** popup window, enter required information
 - First Name
 - Last Name
 - Date of Birth
 - SSN
 - Click **SAVE**
- Selected document(s) can also be **Linked** to **Individual** or **Household**
 - Select document or pages and click on  next to **Household** or **Individual** to **Link** document or pages





- In the **LINK DOCUMENT** popup window, complete required fields
 - Select **Document Type** from dropdown menu
 - Enter **Expiration Date**
 - Checkmark the box if Document will be used as the New Default Document Type
- Click **LINK**
- Document or selected pages are now Linked to the Individual or Household
 - Click  **UNDO** to undo linked document(s)

NOTE: If selected pages were Linked, the pages not Linked will be displayed in "Pages Not Linked" field box.

Link Document

Please select a document type, default status, and expiration date for this document being linked to [Camden Hall](#)

Source Document: URLA_2019_Borrower_v28.pdf

Selected Pages: 1,2

Document Type *
Application [LIHEAP] ▼

Expiration Date * Is Default ⓘ

Link

Cancel