

# Technology Updates

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Presentation to: DHS Board

Date: April 18, 2012



# AGENDA

- Purpose
- Document Imaging System (DIS)
  - Self Service Document Capture
  - Oracle Distributed Document Capture
  - Universal Content Management
  - DIS Review
  - Future Capabilities
- Client Notices

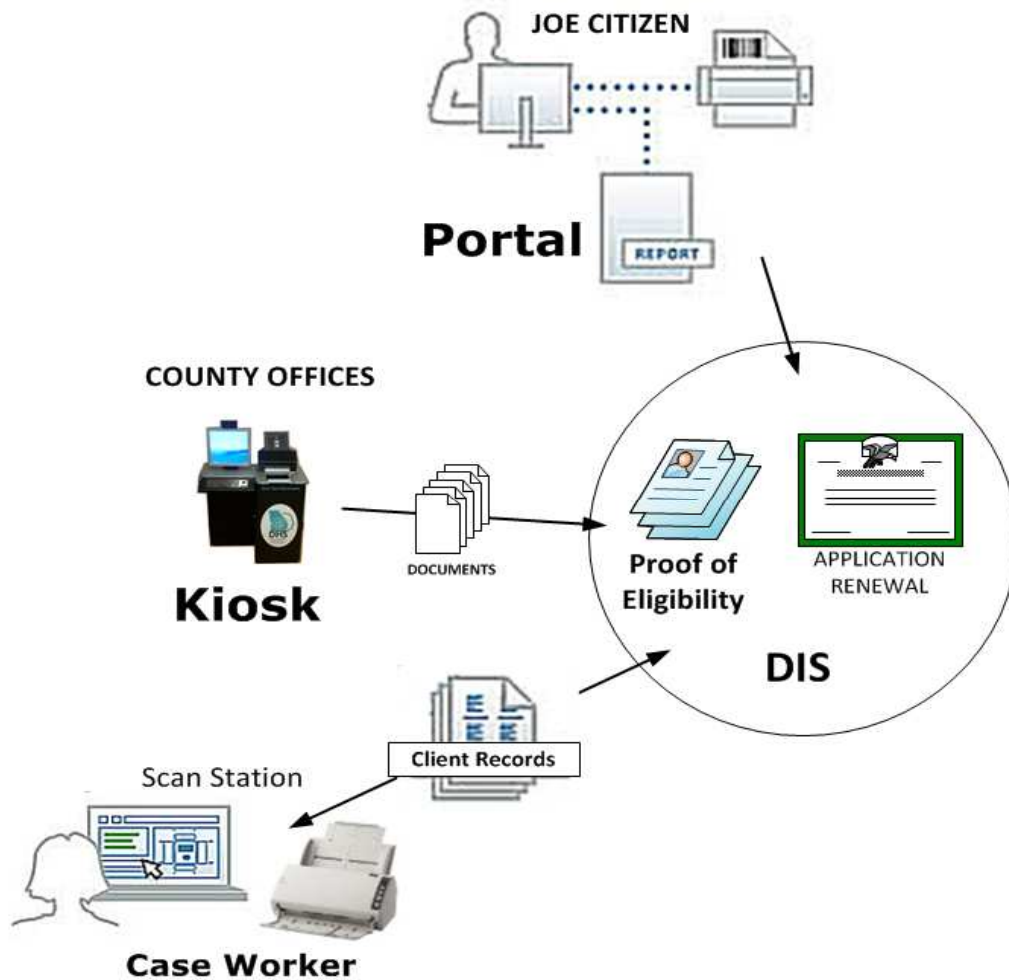
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# Purpose of the Document Imaging System (DIS)

- Provide DHS with a robust Enterprise Content Management Architecture to store documents electronically
- Provide the citizens of Georgia a self-service capability to scan and/or upload the necessary documentation when applying for Human Services programs.

# Document Imaging System



## IMPROVEMENTS

### Customers

- Submit documents from home and avoids standing in long lines.
- Quicker turn around of their applications

### State workers

- Automated workflow improving operations
- Better organization of records
- Easier/faster retrieval of documents
- Sharing of eligibility documents with other DHS divisions

# Self Service - Portal

**GEORGIA DEPARTMENT OF HUMAN SERVICES**  
Common Point of Access to Social Services  
Division of Family & Children Services

Georgia.gov > Agencies & Organizations > Department of Human Services > DFCSS > COMPASS

Hello, Mary. You are logged in. [Logout](#)

[Print](#) [Survey](#)

[Manage Account](#)

[Report Changes](#)

[Upload Docs](#)

**Welcome to MyCOMPASS!**  
Welcome to MyCOMPASS. MyCOMPASS allows you to manage your current benefits on-line. If you haven't used a computer very much and would like to practice before you get started, [click here](#).  
We've taken a number of steps to keep your information private and secure. Click on [MyCOMPASS Account](#) to learn more about our security or to manage your account.  
If you have any questions, please call the Online Service hotline at 1-800-869-1150.

**Check Your Benefits**  
Below is a summary of all the programs that you are currently receiving or have received in the last 60 days. To see more details of a program, click on the view details button next to the program.

**Review Your Benefits by Program**

Benefit Type	Case Number	Case Status	View Details	Review Date
Food Stamps	252080111	Closed		11/30/2011
TANF	148494011	Active		06/30/2012

- New applications
- Renewals
- Changes to record

At various stages in the application process the Portal allows constituent to Upload electronic eligibility documents Into the DHS Document Imaging Application

**Thank You!**  
Thank you! Your Change Report has been sent to the Call Center for processing.  
Keep in mind that your worker may ask for proof of some of the things you told us in your Change Report. Listed below are the types of proof that you may need to provide.

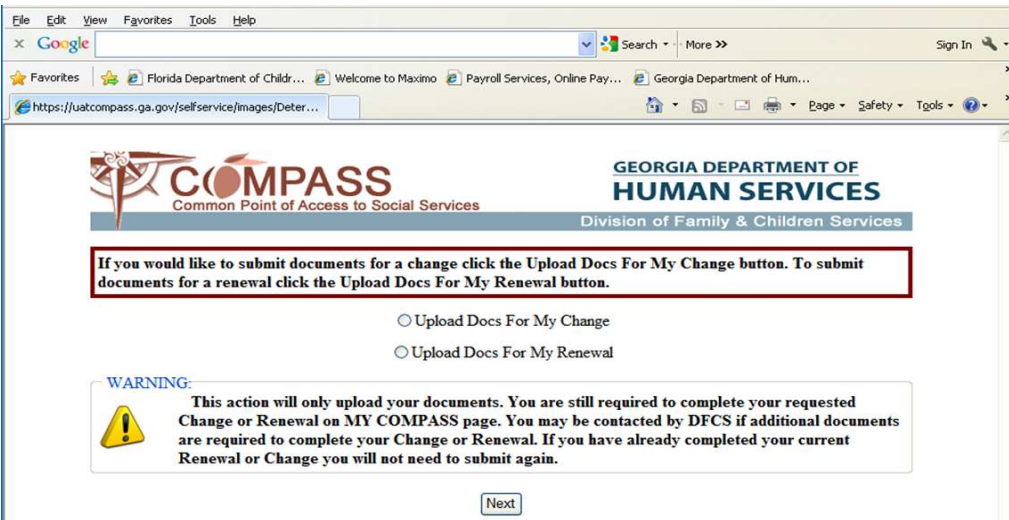
Type of Proof	Examples
Proof of a job	Dated paycheck stubs for the last 30 days, or a statement from your employer.
Proof of other income	An award letter or a current benefit check.
Proof of immigration status (Only for those seeking benefits)	Green Card or registration card.
Proof of citizenship (Only for those seeking benefits)	Birth Certificate, Passport, Certificate of Naturalization, or Certificate of Citizenship.
Proof of Social Security Number	Copy of your Social Security Card or proof of application.
Proof of Dependent Care Payment	Cancelled check, receipt, or statement from provider.
Proof of Pregnancy (Not required for Food Stamps)	A signed and dated note from a doctor or other health care professional. This note needs to say that the person who is applying is pregnant. It should also state her due date.
Proof of Immunization (Not required for Food Stamps)	Certificate of immunization issued by any health care facility that includes the provider's signature and provides the next immunization due date, DHS Form 3231, or Child Care Immunization Certificate.

If you have any documents that you would like to submit to the person working on your reported change, you may upload them now by clicking on the Upload Docs button or go to the MY COMPASS homepage and select the Upload Your Documents button.

[Upload Docs](#)

**Keep Track of Your Change Report**  
Your tracking number for your Change Report is **8000503689**.  
Be sure to write this number down or print this page for your records. If you have questions about your Change Report, having this number will help you get answers more quickly.  
Keep in mind that it will take some time for your changes to be made, but in most cases, your changes will be processed within 10 days.

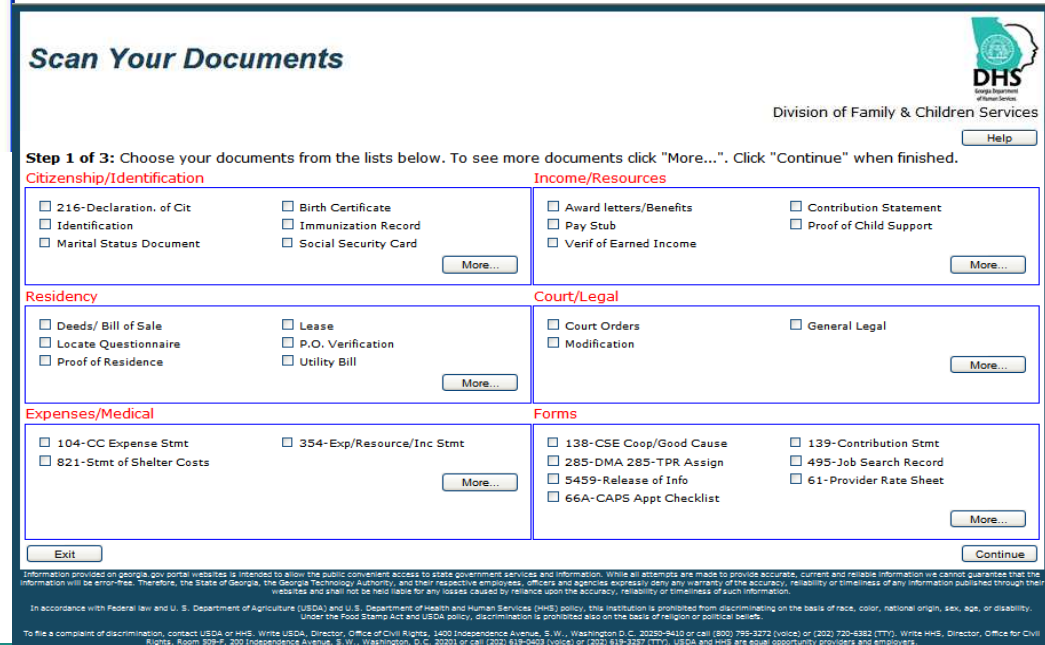
# Self Service Portal - Continued



This page will display after:  
The user clicks Upload Docs button from the Thank you Submission Page or the Application Status Check page



This is the page that displays when a user clicks the upload docs button from the MY COMPASS Home Page



# Self Service - Kiosk



**Scan Your Documents**

Para Espanol, haga [click aqui](#) Department of Human Services

the DHS Scanning Station Help

Welcome to the Georgia Department of Human Services Scanning Station

Please select the service you are scanning items for.

(Temporary Assistance for Needy Families)

Information provided on georgia.gov portal websites is intended to allow the public convenient access to state government services and information. While all attempts are made to provide accurate, current and reliable information we cannot guarantee that the information will be error-free. Therefore, the State of Georgia, the Georgia Technology Authority, and their respective employees, officers and agencies expressly deny any warranty of the accuracy, reliability or timeliness of any information published through their websites and shall not be held liable for any losses caused by reliance upon the accuracy, reliability or timeliness of such information.

Customers are given:

- Choice of DHS Division
- Choice of Document to Scan
- Step by Step Instructions
- Average Scan time is 15 min.

**Scan Your Documents**

Division of Family & Children Services Help

**Step 1 of 3:** Choose your documents from the lists below. To see more documents click "More...". Click "Continue" when finished.

<b>Citizenship/Identification</b> <input type="checkbox"/> 216-Declaration of Cit <input type="checkbox"/> Identification Document <input type="checkbox"/> Marital Status	<input type="checkbox"/> Birth Certificate <input type="checkbox"/> Immunization Record <input type="checkbox"/> Social Security Card	<b>Income/Resources</b> <input type="checkbox"/> Award letters/Benefits <input type="checkbox"/> Pay Stub <input type="checkbox"/> Verif of Earned Income	<input type="checkbox"/> Contribution Statement <input type="checkbox"/> Proof of Child Support
<b>Residency</b> <input type="checkbox"/> Deeds/ Bill of Sale <input type="checkbox"/> Locate Questionnaire <input type="checkbox"/> Proof of Residence	<input type="checkbox"/> Lease <input type="checkbox"/> P.O. Verification <input type="checkbox"/> Utility Bill	<b>Court/Legal</b> <input type="checkbox"/> Court Orders <input type="checkbox"/> Modification	<input type="checkbox"/> General Legal
<b>Expenses/Medical</b> <input type="checkbox"/> 104-CC Expense Stmt <input type="checkbox"/> 821- Stmt of Shelter Costs	<input type="checkbox"/> 354-Exp/Resource/Inc Stmt	<b>Forms</b> <input type="checkbox"/> 138-CSE Coop/Good Cause Assign <input type="checkbox"/> 285-DMA 285-TPR	<input type="checkbox"/> 139-Contribution Stmt <input type="checkbox"/> 495-Job Search Record

**Scan Your Documents**

Division of Family & Children Services Help


You have selected a Income/Resources document to scan. Follow the instructions below to scan your Award Letters/Benefits document.

**Step 2 of 3:**

1. Remove any staples or paper clips.
2. Place pages in the slot upside down and face down.
3. If two-sided, place first page face down.
4. Select who you are submitting this document for below.
5. Click "Scan".

Who are you submitting this document for?

CHANTELL F GRAYSON  
 KENDRA GRAYSON  
 CHARLES M GRAYSON  
 LAMAR GRAYSON



## Kiosks

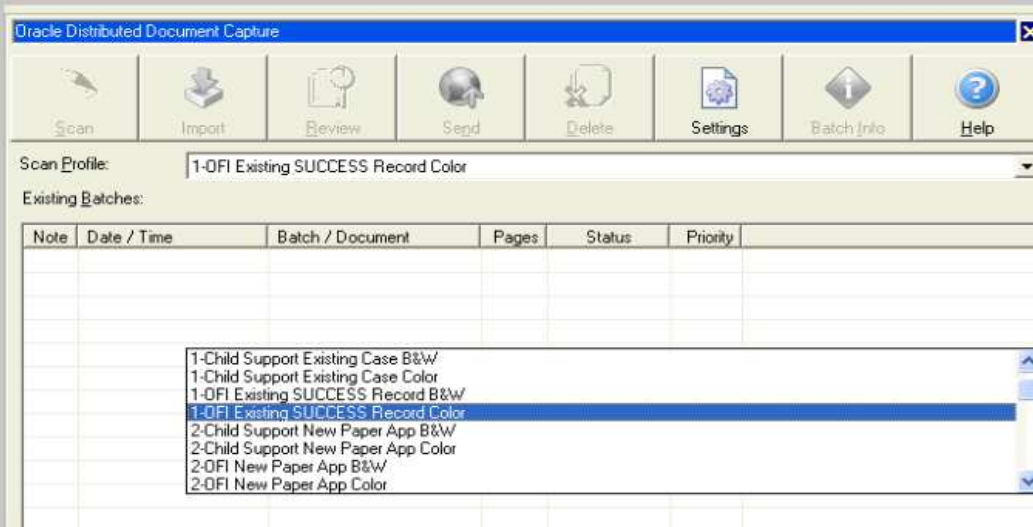
- County Office Lobbies
- Presently have 75 Kiosks
- 100 more Planned



# Benefits of Self-Service

- Better Customer Service: Citizens can submit required documents from home or at the office kiosk which cuts down on office foot traffic and customer wait times
- Eliminates manual process: Citizens are given the ability to scan and index the documents thus enabling workers to spend their time in processing applications and renewals thus increasing productivity

# Back Office Automation



- Document Toolbar
- Document Page Layout
- Indices Dropdown boxes
- Document Viewer



Scanning Profiles that determine

- Color of image
- Program
- Document Meta-data



# Benefits of Back Office Automation

- Eliminates the need to request the same document again. Scan once keep forever. Across Programs.
- Eliminates physical filing of documents. State Employees electronically file and catalog the document into repository.
- Automates subsequent manual business processes by facilitating workflow.

# Pilot Status

## DFCS DIS Pilot

- Region 10
- 14 Counties
- next region rollout in June

## DCSS DIS Pilot

- Gwinnett County
- uploaded images from the SMI repository
- next county rollout in June

## Pilot Documents in Repository

### OFI & Child Care

Total thru 4/13/2012		
Application	Transaction Count	Document Count
Back Office	38287	77579
SSDC-Import	371	1310
SSDC-Kiosk	455	1473
<b>Totals</b>	<b>39113</b>	<b>80362</b>

### Child Support

Total thru 4/13/2012		
Application	Transaction Count	Document Count
Back Office	476	1150
SMI Migration	760843	760846
<b>Totals</b>	<b>761319</b>	<b>761996</b>

# Overview of the Universal Content Management Tool

Navigation: My Content Server | Browse Content | Content Management | Administration

### Search

Head of Household   
Client ID (CRS/IRN)   
AU #   
Caps ID   
CSS ID   
Release Date: From  (mm/dd/yy)  
To  (mm/dd/yy)  
Sort By: Date  Descending

### Saved Queries

Global Saved Searches

- [Global Office Search](#)
- [Global Client Search](#)
- [ChildCare Case Search](#)
- [ChildSupport Non 4D Search](#)
- [ChildSupport Case Search](#)
- [OFL Case Search](#)

[My Saved Searches](#)

### All Active Workflows My Workflow Queue (0)

Queue	Queue Description	Aging	Tasks
<a href="#">DHS_ChildCareCOMPASSApp</a>	Workflow queue for supporting documents submitted with a new COMPASS-based application	3	9
<a href="#">DHS_ChildCareChange</a>	Workflow queue for supporting documents submitted with a change to benefits	0	1
<a href="#">DHS_ChildCarePaperApp</a>	Workflow queue for new paper-based applications and supporting documents	0	0
<a href="#">DHS_ChildCarePending</a>	Workflow queue for supporting documents submitted with a pending application	58	84
<a href="#">DHS_ChildCareRenew</a>	Workflow queue for supporting documents submitted with an application for benefits renewal	263	308
<a href="#">DHS_SocialServicesCOMPASSApp</a>	Workflow queue for supporting documents submitted with a Social Services COMPASS application	0	0
<a href="#">DHS_SocialServicesChange</a>	Workflow queue for supporting documents submitted with a Social Services change to benefits	0	0

Repository for Documents with two major features

- Robust search engine
- Document Queues for business workflows

# Universal Content Management – Search Result

Search New Check-In Client Search

My Content Server Browse Content Content Management Administration

### Workflow Task

All Active Workflows --> DHS\_OFIPending --> ID166250

**Program:** FM  
**App/Rpt/Rev Date:** 02/23/2012  
**Date of Entry:** 02/23/2012

Match found. Head of Household ID\*: 250039146 [Validate]

**Capture Source:** Back Office  
**County:** Dougherty County  
**Capture Office #:** OFI-057  
**Capture ID:** tahines  
**Transaction ID:** OFIX05342960

AU #	Case Load #	Supervisor ID
27115260		
451235803		
339323611		

Total Documents: 1

Content ID	Document Category	Document Type	AU #*	SUCCESS Client Name*	SUCCESS CRS #
ID166234	Forms - OFI	94-Medicaid Application	451235803	ANGELA D JACKSON	2500391

Showing 1 to 1 of 1 entries

\* Required Field

[Complete] [Cancel] [Reassign]

- Search results show document(s)
- Each document is defined
- Capture information is displayed

# Universal Content Management - Worker Queue

Workflow Content Items  
All Active Workflows --> DHS\_OFIPending

The Workflow Queue was last refreshed at Apr 12, 2012 2:49 PM EDT. [Refresh This Workflow Queue](#)

Client ID:

TO  TO

Transaction	Program	County	Case Load ID	Supervisor ID	Date of Entry	App/Rpt/Rev Date
OFIX03846713	FS Multiple	Douglas County	2/9/12 3:30	029W	02-08-2012	01-27-2012
OFIX04633753	FM	Dougherty County	543e	029W	02-16-2012	02-07-2012
OFIX04733525	FM	Dougherty County	700A	029W	02-17-2012	02-16-2012
OFIX04750925	FM	Dougherty County	700A	029W	02-17-2012	02-15-2012
OFIX05155694	FM	Colquitt County	700A	029W	02-21-2012	02-21-2012
OFIX05156176	FS Expedited	Colquitt County	700A	029W	02-21-2012	02-21-2012
OFIX05162669	FM	Dougherty County	700A	029W	02-21-2012	02-14-2012

- Eight (8) filters to sort documents in queue
- Can filter by one or all filters at once
- Displays 100 entries (documents) at a time

# Benefits of UCM

- Reduced Storage
- Flexible Indexing, Easier Search & Retrieval
- Sharing of Documents by different Programs or Divisions
- Controlled and Improved Document distribution
- Improved Security
- Disaster Recovery
- No Lost Files
- Improved Regulatory Compliance
- Improved Internal Operations
- Improved customer service and satisfaction



# REVIEW – CURRENT STATE

## DHS Document Imaging System

### Document Submission Channels



Self-Service



MFD



Scanner



Computer

### Oracle Capture

- Imaging

### Oracle Universal Content Management

- Document Management
- Search & Retrieval
- Workflow
- Reporting
- Records Management

### Oracle Database

## Integrated Systems



COMPASS



SHINES



SUCCESS

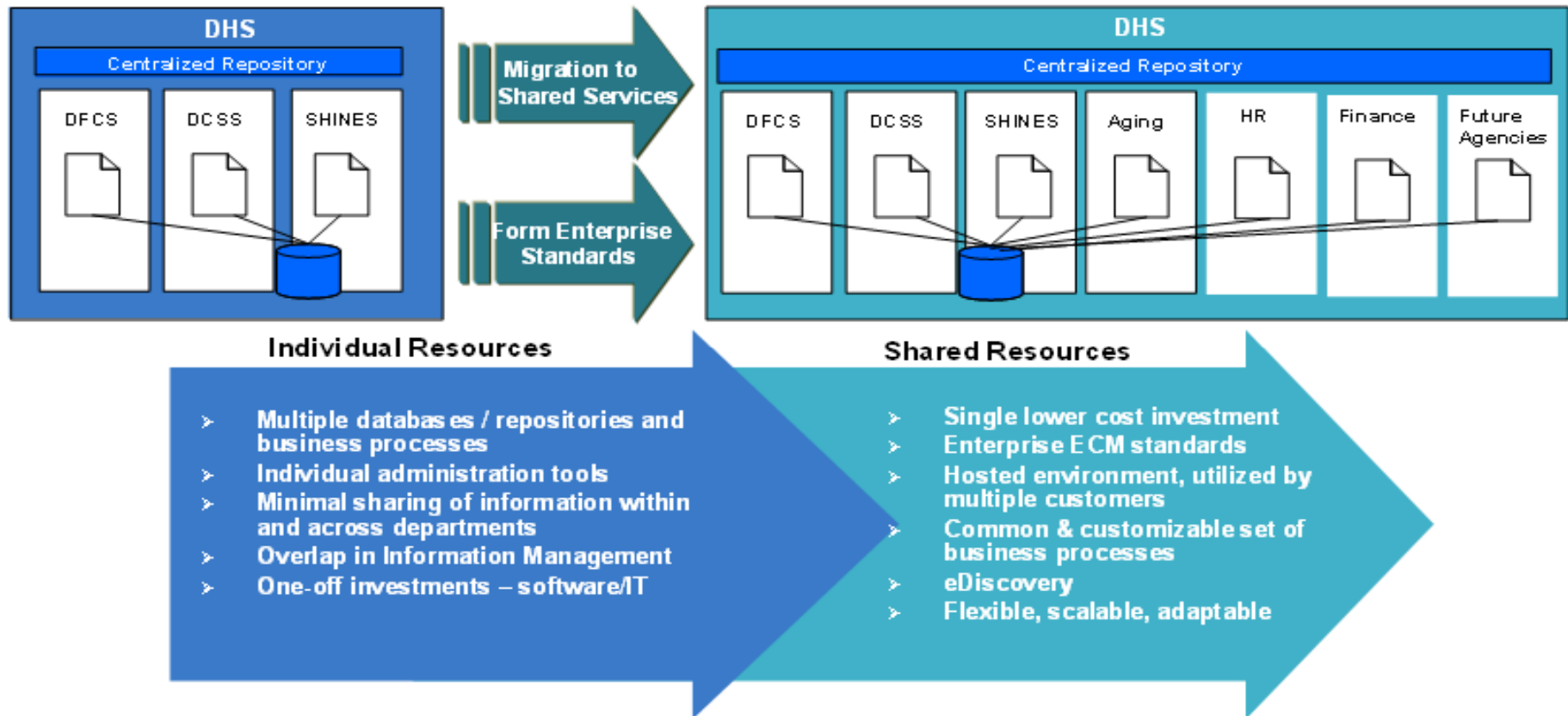


\$TARS



CSPP

# Future Capabilities



# AGENDA

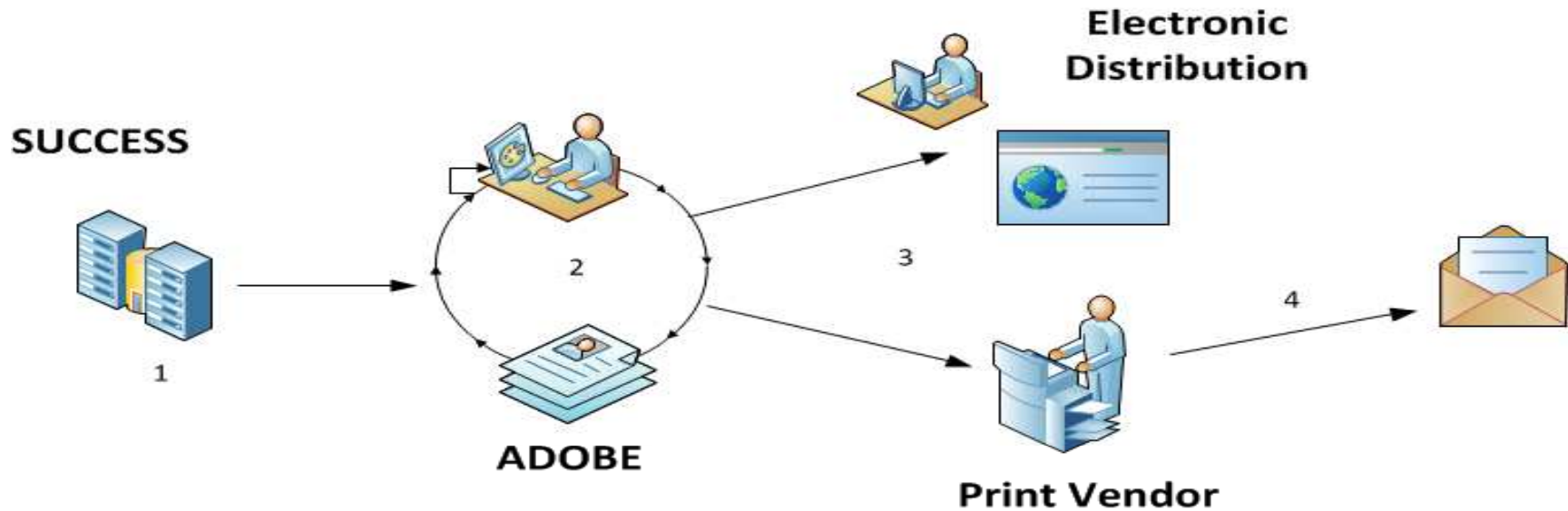
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# Client Notices in SUCCESS

## PROBLEMS WITH CURRENT TECHNOLOGY

- Any changes to the Notice is time consuming – Any wording changes to Notice Template requires reprogramming in Cobol
- Hard to Read - Notice to clients notifying them of their eligibility for more than one program results in disjointed and fragmented notice.
- Renewal notice process too cumbersome – Currently the client is required to review their entire application for changes

# New Technology – ADOBE Lifecycle Production Print



1. Success still maintains and provides client notice data
2. Adobe designs notice template and merges data into final output format
3. Notice distribution alternatives:
  - Provides current mail out capability
  - Electronic notices distribution (client portal account, email, or web sites)

# Benefits of ADOBE Lifecycle Production Print

- Easily author electronic forms. Not dependant on programmers to make changes to notice templates.
- Has a high-performance document composition engine
- Integrates with spell-check system and customizable dictionaries
- Can group documents so that notices going to the same person or family can be batched and sent together.
- Delivers complex jobs involving multiple output types simultaneously