This memo sets forth instructions for implementation of the Document Upload Portal. Unless otherwise indicated, policy and process changes contained within this memo are effective upon receipt.

**A. PURPOSE/BACKGROUND**

Currently, long-term care facilities and external partners such as Presumptive Eligibility entities must submit documents associated with a consumer’s case to the KanCare Clearinghouse by fax, postal mail, or a secured email process. These processes are often problematic and can cause unnecessary delay in the process of associating a document with a specific case.

The Document Upload Portal is a tool that will allow long-term care facilities and Presumptive Eligibility entities to upload documents directly to a consumer’s case and into ImageNow, eliminating the need for documents to be sent through other methods.

**B. IMPLEMENTATION OF THE DOCUMENT UPLOAD PORTAL**

Implementation of the Document Upload Portal will be completed in phases. The initial pilot phase, running April – November 2018, included the participation of only a few specific nursing facilities and all Presumptive Eligibility entities across the state. The second phase, beginning December 1st, will incorporate all nursing facilities in Kansas over a period of several months. During this phase, groups of nursing facilities will be onboarded in a staged rollout, onboarding one group each month. Incorporation of additional providers may be completed as part of a future phase.
C. ACCESSING THE DOCUMENT UPLOAD PORTAL

The Document Upload Portal may be accessed at: https://docuploadportal.kees.ks.gov. The portal may only be accessed by appropriate providers and is not accessible to the general public. Access to the Document Upload Portal is restricted to email accounts which have been validated and included on the white list. Providers accessing the portal are required to have a valid email account associated with the facility (e.g. YourName@Provider.com) to be included on the white list. Unauthorized email domains such as Hotmail or Gmail will not pass email validation and will not be allowed access to the portal. The white list is maintained by KEES Security.

1. ACCOUNT CREATION AND VALIDATION

Providers will create their own user accounts and passwords through the account creation screen within the portal. Upon account creation, an email with a Validation Token will be sent to the provider to complete the final registration of their account. The provider must enter the Validation Token in the Document Upload Portal to complete their registration. Providers may begin uploading documents once they have successfully validated their email account.

Note: Providers with Self-Service Portal accounts may not use the same user name to access the Document Upload Portal.

2. PROVIDER RESOURCES

The following resources are available to aid providers in use of the Document Upload Portal.

a. DOCUMENT UPLOAD PORTAL USER MANUAL

A user manual has been developed as part of implementation of the Document Upload Portal and is attached to this memo. The user manual can also be found on the KDHE Eligibility Policy website by using the following link: http://kancare.ks.gov/policies-and-reports/kdhe-eligibility-policy

The user manual provides a summary of the Document Upload Portal and instruction for use of the portal, account creation, accessing a forgotten user name, and accessing a forgotten password.

b. TECHNICAL SUPPORT
Providers must contact the Help Desk at 1-877-782-7358 for technical support related to account creation and deactivation, password resets, or error messages.

3. **Transition to the Document Upload Portal**

Providers are to begin using the Document Upload Portal immediately following activation. The secured email process is eliminated with this implementation. To allow providers ample time to transition to use of the Document Upload Portal, a period of thirty (30) days will be allowed following the activation of a specific facility. After that time, secured email will no longer be accepted. If a provider should choose not to use the Document Upload Portal, they must submit documents by fax or postal mail.

D. **Use of the Document Upload Portal**

The portal is restricted to document uploading and will not allow providers to access any of the consumer’s program information in KEES.

1. **uploading Documents**

Providers uploading documents must be able to identify the case number and date of birth of the Primary Applicant listed on the Medical program block. The definition of Primary Applicant is someone applying for themselves, their spouse, their minor children, or for other children living in the household. Documents may not be uploaded to Non-Medical cases or program blocks even if the Primary Applicant information matches. Additionally, documents may not be uploaded to Medical Program blocks with a Requested Medical Type (RMT) of ADAP or PPS.

Appropriate use of the portal is for providers to upload requested verifications, report changes, and submit MS-2126 forms. Documents may be uploaded individually or in packages. The Document Upload Portal accepts a maximum file size of 25 MB and the following file types: Microsoft PowerPoint, Microsoft Word, Microsoft Excel, PDF, TXT, HTML, BPM, JPG and JPEG. All documents uploaded via the portal should include a cover sheet.

Applications and reviews shall not be uploaded through the portal as it may cause unnecessary registration and processing delays. Providers must continue to submit applications and reviews by fax, mail, or through the online Self-Service Portal. Providers will be issued a warning if an application or review is uploaded through the portal. If the provider continues to upload applications or reviews, access to the portal may be suspended.
2. **Upload Troubleshooting**

Contact with the HelpDesk is necessary if a provider believes a document was not uploaded successfully. This includes situations where a document was successfully uploaded but not to the appropriate case. See section C.2.b. above for more information about contacting technical support.

---

**E. Receipt of Uploaded Documents**

Upon receipt, uploaded documents are defaulted to the ‘Medical Provider Documents’ Document Type and must be re-indexed to the appropriate Document Type in ImageNow. A chart of Document Types approved for use by Medical staff is attached to this memo.

As indicated in section D.1. above, applications and reviews are the only documents providers may not upload through the Document Upload Portal. When a request for a fair hearing is received, it is important that eligibility staff pay attention to who the request is from. Current policy outlined in Medical KEESM 2111(3) and KFMAM 2010.03 does not allow a Facilitator to request a fair hearing on behalf of an applicant or recipient. The Facilitator may submit the consumer’s request for fair hearing through the Document Upload Portal but may not request the fair hearing themselves.

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**1. Tasks**

Once documents are uploaded through the portal and into ImageNow, an ‘Uploaded Medical Provider Document’ task is created in KEES with the associated case number in the Medical Provider Documents queue. Tasks generated from the Document Upload Portal will use the date submitted as the received date of the document. While multiple documents may be uploaded to a case separately, only one task will be generated per day. If an ‘Uploaded Medical Provider Document’ task with a status of ‘New’ or ‘Assigned’ already exists for a specific case, a new task with the same received date will not be generated. If the case has no associated ‘Uploaded Medical Provider Document’ task or has an existing ‘Uploaded Medical Provider Document’ task that is in completed or rejected status, a new task will be generated.

---

**2. Monitoring the Medical Provider Documents Queue**

It is the responsibility of the mailroom to monitor the Medical Provider Documents queue, review all uploaded documents, and re-index them to the appropriate Document Type. The mailroom must also ensure the appropriate downstream task is created.

Again, as indicated in section D.1. above, providers may not upload applications or reviews through the Document Upload Portal. If an application or review is received through the
portal, mailroom staff must re-index the application or review to the appropriate document type and immediately route to Registration staff to ensure timely processing. The date the application or review was uploaded is considered the date of receipt. The mailroom must also communicate with the manager of the eligibility processing team each time an application or review is incorrectly uploaded through the portal, allowing them to coach the facility regarding appropriate use of the Document Upload Portal.

3. **Responsibility of Eligibility Staff**

   The possibility exists for eligibility staff to access a case where documents have been uploaded through the portal prior to mailroom staff having a chance to review and re-index the uploaded documents to the appropriate type. If this situation occurs, the eligibility worker shall re-index the uploaded documents appropriately and complete any necessary action. If the eligibility worker is unable to complete the actions needed, they must ensure the appropriate task is created based on the type of document received to route the case for processing.

   If an eligibility worker identifies an application or review that has been incorrectly uploaded through the Document Upload Portal, the eligibility worker shall release the task and allow the mailroom to re-index the application/review and generate the appropriate downstream workflow. If the application/review will impact the task currently being worked, the eligibility worker shall place the task on hold and continue processing once the application/review has been registered. Following registration, the eligibility worker shall process both the original task and the review/application. If the application/review will not affect the current task being worked, the eligibility worker shall continue processing.

   To ensure the facility receives coaching on appropriate use of the Document Upload Portal, the mailroom must report to the eligibility manager each time an application or review is uploaded. Upon receipt of this information, the eligibility manager will reach out to the facility to provide coaching on appropriate use of the Document Upload Portal.

   Consider the following examples:

   a. When processing a review for an individual receiving institutional care, the eligibility worker sees the nursing facility has uploaded a past due and owing expense through the Document Upload Portal earlier that day. The mailroom has not had a chance to address the uploaded documents. The eligibility worker claims the 'Uploaded Medical Provider Document' task and re-indexes the past due and owing expense to the appropriate document type in ImageNow. The eligibility worker processes both the review and the expense at the same time, completing both tasks.

   b. When processing an expense task, the eligibility worker sees the nursing facility has uploaded the consumer’s review through the Document Upload Portal. The eligibility
worker looks over the review and determines it will not impact the outcome of allowing the past due and owing expense. The eligibility worker does not claim the ‘Uploaded Medical Provider Document’ task and allows the past due and owing expense toward the consumer’s monthly share of cost, completing the original task.

c. When processing an income change task, the eligibility worker sees the nursing facility has uploaded the consumer’s review through the Document Upload Portal. The eligibility worker looks over the review and determines it will impact the outcome of the income change task. The eligibility worker does not claim the ‘uploaded Medical Provider Document’ task and places the income change task on hold while the review is registered. Once the review has been registered, the eligibility worker process both the income change and the review.

F. UPDATED FORMS

The following forms/guides have been updated or created with this policy implementation and may be found on the KDHE Eligibility Policy website by using the following link: http://kancare.ks.gov/policies-and-reports/kdhe-eligibility-policy.

1. DOCUMENT UPLOAD PORTAL USER MANUAL

The user manual provides a summary of the Document Upload Portal and instruction for use of the portal, account creation, accessing a forgotten user name, and accessing a forgotten password.

2. IMAGING DOCUMENT TYPES FOR MEDICAL CASES (KC-7200)

The KC-7200 provides a list of document types used for medical assistance, examples of documents that would fall into each document type, as well as the task generated automatically in KEES when a particular document type is used.

G. QUESTIONS

For questions or concerns related to this document, please contact one of the KDHE Medical Policy Staff listed below.

Erin Kelley, Elderly and Disabled Program Manager - Erin.Kelley@ks.gov
Jerri Camargo, Family Medical Program Manager – Jerri.M.Camargo@ks.gov
Jeanine Schieferecke, Senior Manager – Jeanine.Schieferecke@ks.gov
Questions regarding any KEES issues are directed to the KEES Help Desk at KEES.HelpDesk@ks.gov
KEES HELP DESK

Please contact the Help Desk:
- User account Sign Up issues
- Assistance with password security questions
- Other unresolved issues

Help Desk 1-877-782-7358

Locating Case Number on Form

KanCare Clearinghouse
PO Box 3599
Topeka, KS 66601-9738

CASE NAME
Address 1
Address 2
City, KS ZIP

Notice Date: 11/20/2018
Case Name: CASE NAME
Case Number: 00000000
Program: Medical

Verification Request List

The following is a list of verifications that are needed in order to determine and/or maintain your eligibility for benefits or to prove reported information.

Please provide these verifications by the due date listed below. Failure to provide the requested information may cause your benefits or services to be denied, delayed, or closed.
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**LOG OUT**

- Click Log Out in the top right-hand section of the Document Upload Portal home page.
FORGOT USER NAME
• From the Document Upload Portal homepage click the **Forgot User Name** hyperlink.
• The **Forgot User Name** page displays. Enter personal information and click the **Submit** button.
• An email will be sent to the email address on file with your User Name.

FORGOT/CHANGING PASSWORD
• From the Document Upload Portal homepage enter your User Name and click the **Forgot Password** hyperlink.
• The **Verify User** Page displays with the Provider security questions.
• Fill in the answers to the Security questions. Click the **Continue** button.
  **NOTE:** If you do not remember your answers See Page 10.
• The **Reset Password** page displays. Enter a new Password and Confirm Password. Click the **Submit** button.
  **NOTE:** Password cannot be one of the six passwords previously used.
• The Confirmation Message page will display informing you of a successful password change.

Document Upload Portal

GENERAL INFORMATION
The Document Upload Portal is a web based password secured public portal that allows providers to upload documents for an existing medical case.

- Supporting Documentation

To use the Document Upload Portal, you will need to sign up.
SYSTEM SUMMARY

User Access

https://docuploadportal.kees.ks.gov

URL to access the Document Upload Portal Homepage.

Let’s get started

• From the Document Upload Portal homepage click Sign Up.

• The Welcome page displays with instructional text.

• Click Continue.

Important – The providers should include a cover sheet containing beneficiary’s name and date of birth with each document uploaded.

The Document Upload page will display the case number the documents will be uploaded to. If the case number is incorrect, click the Cancel button.

Documents cannot exceed 25MB. The Portal only accepts PowerPoint, Word, Excel, PDF, TXT, HTML, HTM, BMP, JPG, and JPEG file types.

• To Upload a document click Browse; this allows you to search your computer for a document to upload.

• Select the document to upload. The file will populate on the Document Upload page.

• Click the Upload button.

• The Document Upload Success page will display.

NOTE: Click the Upload Another Document button up Upload another Document to the same case number. Click the Close button to Upload a Document to a different case number.
USING THE SYSTEM

• Sign into the Document Upload Portal
• Click the Upload Document hyperlink.
• The Consumer Search page will display.

Consumer Search

The Consumer Search page allows providers to identify consumers for document upload.

• Enter the Medical Case Number. See page 10 to locate Case Number on Form.
• Enter the Primary Applicants Date of Birth.
• Click the Search Button.
  If no match is found it will display; Error! The information you entered does not match our records. Please try again.
• If a match is found the Document Upload page displays.

Provider Information

• The User Online Account Credentials page displays. This page captures credentials required for account setup.

User Name cannot contain special characters. The Password cannot contain the User Name. Password must be at least eight characters and contain all the following four characteristics:
  • Upper Case
  • Lower Case
  • Numerical
  • Special Character

To Sign Up as a New User and request access complete the following information:

First Name
Last Name
Date of Birth (mm/dd/yyyy)
Phone Information
Email Address Must be a Valid Email and associated to a provider facility
Select Security Questions

NOTE: Select Security Questions you know the answer. You will be asked to answer these questions to recover your password.
Provider Information, cont.

- Once you have all the required information complete click on the **Save and Continue** button.

- The **Verify User Account Credentials** Page displays.

- Use the **Back** button to change any information.

- Verify all details are accurate. Click the **Sign-Up** button to create an account.

- The **Thank you for signing up** page displays.

E-Mail Confirmation

To complete your account setup, you need to validate your email address. A validation email containing a **Validation Token** will be sent to the email address used to create your **Document Upload Portal** account.

- Access your email account and locate the email from KEES.

- Open the email, the **Validation Token** will display.

- Enter the **Validation Token** on the **Thank you for signing up** page and click the **Continue** button.

**NOTE**: If needed click the **Resend** button to resend the validation email.

- The **Email Validation Success** page displays.
KDHE – Document Types and Definitions Used for Imaging on Medical Cases

KanCare Staff who utilize ImageNow for ‘ImageNow Print’ or ‘Scanning’ should use this Guide to identify the appropriate Document Type for the item capturing.

The purpose of this document is to show the tasks that are automatically generated by KEES when a particular document type used. If an automatic task is not generated, the expectation is that a task will be generated manually.

- Capturing documents can create a task when assigning to the Case-Task Basket. Staff should be cognizant of the Document Type selected. Selecting an inaccurate Document Type could create an inaccurate task.

- It is imperative staff are consistent when assigning Document Types so future staff can easily access and locate documents associated to a person, case or resource.

**NOTE:** This document is searchable; to search for a form or specific phrase select Ctrl + F. A Find window will display in the top of this document. Enter search criteria and hit the Enter key on the computer keyboard. If the search criteria is found it will be highlighted on this document. Use the Previous and Next keys on the Find window to navigate findings.
<table>
<thead>
<tr>
<th>Document Type</th>
<th>Definition</th>
<th>Examples</th>
<th>Queue/Task created/ PRIORITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>BCC Application</td>
<td>An application for Breast and Cervical Cancer.</td>
<td></td>
<td>Registration/BCC Application</td>
</tr>
<tr>
<td>Expedited PW KanCare Application</td>
<td>An application for medical assistance where one or more individuals indicated they are pregnant.</td>
<td>Application form with the Expedited box checked or the pregnancy question answered &quot;yes&quot;</td>
<td>Data Entry/Application/ Expedited</td>
</tr>
<tr>
<td>Inmate Application</td>
<td>Application for an Inmate application</td>
<td>Correctional Facility Inmate-Qualifying Event</td>
<td>Registration/Inmate Application</td>
</tr>
<tr>
<td>Pre-Release Application</td>
<td>Application for Pre-Release application</td>
<td>Pre-Release Application</td>
<td>Registration/Pre-release application</td>
</tr>
<tr>
<td>KanCare Application</td>
<td>An application for medical Assistance.</td>
<td>KC-1100 and KC-1100S Medical Assistance Application for Families with Children, EN and SP&lt;br&gt;KC-1500 and KC-1500S Medical Assistance Application for the Elderly and Persons with Disabilities, EN and SP&lt;br&gt;ES-3100.8 and ES-3100.8S Medicare Savings Program application, EN and SP</td>
<td>Data Entry/Application</td>
</tr>
<tr>
<td>Document Type</td>
<td>Definition</td>
<td>Examples</td>
<td>Queue/Task created/ PRIORITY</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>PII- Newborn*</td>
<td>Documents received pertaining to a birth</td>
<td>Birth Confirmation Letter</td>
<td>Eligibility/PII-Newborn</td>
</tr>
<tr>
<td></td>
<td>*Mailroom only use</td>
<td>Birth Certificate</td>
<td></td>
</tr>
<tr>
<td>Potential CH Application</td>
<td>Used for medical applications that need an Accelerated Priority</td>
<td>KC-1100 and KC-1100S Medical Assistance Application for Families with Children, English and Spanish versions.</td>
<td>Data Entry/DCF Application Form</td>
</tr>
<tr>
<td></td>
<td></td>
<td>KC-1500 and KC-1500S Medical Assistance Application for the Elderly and Persons with Disabilities, English and Spanish versions.</td>
<td></td>
</tr>
<tr>
<td>TB Application</td>
<td>Application for Tuberculosis treatment</td>
<td>ES-3100.3 Certification of Need for Hospital</td>
<td>Registration/TB Application</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tuberculosis Treatment</td>
<td></td>
</tr>
<tr>
<td>Unsigned CH Application</td>
<td>An application for medical assistance where there is no signature, or the signature page is missing.</td>
<td>Application form with no signature or with the signature page missing</td>
<td>Registration/Unsigned Application</td>
</tr>
<tr>
<td>Urgent Need KanCare Application</td>
<td>An application for medical assistance with notation of urgent need</td>
<td></td>
<td>Data Entry/ Application / Urgent Need</td>
</tr>
<tr>
<td>Document Type</td>
<td>Definition</td>
<td>Examples</td>
<td>Queue/Task created/ PRIORITY</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------</td>
<td>---------------------------------------</td>
</tr>
<tr>
<td>Barcoded Document</td>
<td>Review application with a barcode</td>
<td>KC-1200 Family Medical Pre-Populated Review</td>
<td>Registration/Review</td>
</tr>
<tr>
<td></td>
<td></td>
<td>KC-1600 Elderly and Disabled Medial Pre-Populated review</td>
<td></td>
</tr>
<tr>
<td>Barcoded Document Expedited</td>
<td>Review application with a barcode where one or more individuals indicated they are pregnant.</td>
<td>Pre-Populated review form with the Expedited box checked or the pregnancy question answered &quot;yes&quot;</td>
<td>Registration/Review/Expedited</td>
</tr>
<tr>
<td>BCC Review</td>
<td>Review form for Breast and Cervical Cancer program</td>
<td>ES-3822A Statement of Continuing Cancer Treatment</td>
<td>State/Process BCC Review</td>
</tr>
<tr>
<td>CH Review</td>
<td>Review application that does not contain a barcode</td>
<td>Application form with a review sticker on the lower left-hand side of the first page.</td>
<td>Registration/Review</td>
</tr>
<tr>
<td>Passive Review Letter</td>
<td>A passive review letter returned by the consumer</td>
<td>*Eligibility/Passive Review Response</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*The system automatically determines the queues to create the task in based on the type of program blocks that exist on the Medical case.</td>
<td>Passive Review Letter</td>
<td>*E&amp;D Eligibility/Passive Review Response</td>
</tr>
<tr>
<td>Working Healthy 6 Month Review</td>
<td>Working Healthy 6-month Review</td>
<td>E&amp;D Eligibility/WH-Review Registration</td>
<td></td>
</tr>
<tr>
<td>Unsigned CH Review</td>
<td>A review application for medical assistance where there is no signature, or the signature page is missing.</td>
<td>Review form with no signature or with the signature page missing</td>
<td>Registration/Unsigned Review</td>
</tr>
<tr>
<td>Document Type</td>
<td>Definition</td>
<td>Examples</td>
<td>Queue/Task created/ PRIORITY</td>
</tr>
<tr>
<td>---------------</td>
<td>------------</td>
<td>----------</td>
<td>-----------------------------</td>
</tr>
</tbody>
</table>
| Appeal        | Documents relating to an appeal  
*Always scanned at the Clearinghouse under the No Task bucket since process is completed prior to imaging. | Agency Appeal Summary  
Request for a Fair Hearing  
Withdrawal of Appeal | No task |
| Concerns      | Documents received where a consumer states dissatisfaction or concerns. | | Concerns/GR-Other |
| Correspondence| Correspondence that cannot be classified in any other document type. | Emails  
Letters  
Medical Application supplements | No task |
| Critical Correspondence | Correspondence that needs to have action taken and cannot be classified in any other document type.  
*The system automatically determines the queues to create the task in based on the type of program blocks that exist on the Medical case. | | *Eligibility/ LTC correspondence  
*E&D Eligibility / LTC correspondence  
*LTC E&D Eligibility/ LTC correspondence |
| Expense       | Documents indicating expenses paid by the consumer excluding medical expenses. | Cable/Internet Bills  
Health Insurance Bills  
Homeowners Insurance Statement  
Property Tax Statement  
Medical Bills  
Medicare Supplement Bills  
Rent/Mortgage Statement  
Utility Bill | No task |
### Supporting Documents continued

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Definition</th>
<th>Examples</th>
<th>Queue/Task created/ PRIORITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal</td>
<td>Legal documents received not pertaining to citizenship or identity.</td>
<td>Court Documents to include Custody papers, Divorce decrees</td>
<td>No task</td>
</tr>
<tr>
<td>Legal Representative</td>
<td>Legal documents authorizing a party to act on the behalf of an individual.</td>
<td>Conservatorships, Durable/Power of Attorney, Guardianship Papers, Notarized forms authorizing someone other than the parents to apply for children</td>
<td>Administrative-CH/Admin Role Update/Legal Representative</td>
</tr>
<tr>
<td>LTC Communication</td>
<td>Forms pertaining to Long Term Care. *The system automatically determines the queues to create the task in based on the type of program blocks that exist on the Medical case.</td>
<td>ES-2126, ES-3160, ES-3161, ES-3164, Care Score</td>
<td>*Eligibility/ LTC correspondence, *E&amp;D Eligibility / LTC correspondence, *LTC E&amp;D Eligibility/ LTC correspondence</td>
</tr>
</tbody>
</table>
## Supporting Documents Continued

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Definition</th>
<th>Examples</th>
<th>Queue/Task created/ PRIORITY</th>
</tr>
</thead>
</table>
| LTC Communication Urgent Need     | Forms pertaining to Long Term Care with an Urgent Medical Need *The system automatically determines the queues to create the task in based on the type of program blocks that exist on the Medical case. | ES-2126  
ES-3160  
ES-3161  
ES-3164, Care Score | *Eligibility/ LTC correspondence / Urgent need  
*E&D Eligibility / LTC correspondence/ Urgent Need  
*LTC E&D Eligibility/ LTC correspondence Urgent Need |
| Medical                            | Documents pertaining to medical care or medical bills received by the consumer.                                                                                                                                 | Insurance Cards  
Pregnancy Verification  
Proof of health insurance coverage  
Medical Records  
Medical Card  
Medicare Card and Supplement cards  
Other Health insurance ID cards | No Task                                                                                                                     |
<table>
<thead>
<tr>
<th>Document Type</th>
<th>Definition</th>
<th>Examples</th>
<th>Queue/Task created/ PRIORITY</th>
</tr>
</thead>
</table>
| Personal Identifying Information (PII)* | Documents received pertaining to citizenship or identity.  
*Category that requires second level indexing | Birth confirmation Letter  
Birth Certificate  
Driver's License  
Immunization Records  
SAVE Verification  
School ID  
Social Security Cards  
School Records  
Web IZ Forms  
VRV Web Form | No task                                                                   |
<p>| PE Tool                          | PE tool used for determination of benefits                                  |                                                    | No task                     |</p>
<table>
<thead>
<tr>
<th>Document Type</th>
<th>Definition</th>
<th>Examples</th>
<th>Queue/Task created/ PRIORITY</th>
</tr>
</thead>
</table>
| Release of Information | Documents signed by the consumer allowing a specified party access to PHI on the consumer’s case. | KC-6100 & KC-6100S Medical Representative Form  
KC-6200 & KC-6200S Facilitator Authorization Form  
Authorization for Release of Protected Health Information (has legal department address in upper left corner)  
ES-3904 HIPAA Compliant Authorization to Disclose Information to KDHE  
DD-1103 Authorized to Disclose Information to KDHE-DDS | Administrative-CH/Admin Role Update |
| Resources           | Documents that verify consumer assets.                                    | AVS Results  
Statements for investment accounts  
Bank statements  
CD paperwork  
Titles to property/Deeds  
Life insurance policies  
Funeral Agreements/Burial Plans  
Kelly Blue Book Values  
Lease Agreements | No task |
## Supporting Documents continued

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Definition</th>
<th>Examples</th>
<th>Queue/Task created and PRIORITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spousal Impoverishment</td>
<td>Documents generated by Clearinghouse staff to demonstrate Spousal Impoverishment.</td>
<td>Spousal Tool, ES-3162, ES-3163, M-2, M-3</td>
<td>No task</td>
</tr>
<tr>
<td>Trust/Annuity</td>
<td>Documents pertaining to Annuities or Trust funds</td>
<td>ES-3167 and ES-3167A, Annuity policies, Three letters refusing to purchase annuity, Trust documents, Reinstatement of Trust documents, Certificate of Trust</td>
<td>No task</td>
</tr>
<tr>
<td>Trust/Annuity Clearance</td>
<td>Used by KDHE Central office for documentation of clearances</td>
<td></td>
<td>No task</td>
</tr>
<tr>
<td>Document Type</td>
<td>Definition</td>
<td>Examples</td>
<td>Queue/Task created and PRIORITY</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Returned Mail-In State        | Documents returned by the post office with a forwarding address within the state.  
                              | Two tasks are generated in two queues.                                    | Contact Updates/Returned Mail -- In State                 |
|                               |                                                                            |                                                                          | Mailroom/Re-mail Returned Mail                           |
| Returned Mail-Out of State    | Documents returned by the post office with a forwarding address outside the state.       |                                                                            | Contact Updates/End Coverage - Program                   |
| Returned Mail-No Fwd Address  | Documents returned by the post office without a forwarding address.         |                                                                            | Contact Updates/Returned Mail - No Forwarding            |
| Returned Mail-No Fwd Address PR Letter | Passive Review Letters returned by the post office without a forwarding address. |                                                                            | Contact Updates/End Coverage                             |