



User Guide

Version 5.1

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1 Introduction

1.1 What is document DNA?

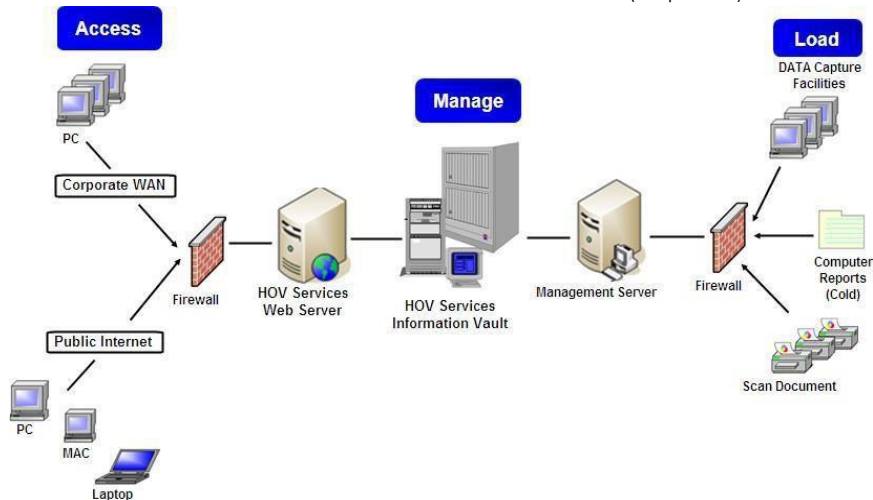
Developed by HOV Services, **document DNA** is an electronic solution for the storage, management and retrieval of large volumes of documents: scanned images or computer-generated text. It is designed to provide companies with value in three ways:

- A reliable filing system (no misfiles or lost documents)
- A secure, web-based document retrieval system
- A set of electronic tools for performing tasks on the documents (i.e., viewing, faxing, emailing, printing, and/or storing on local drives for later use)

1.2 How It Works

There are three stages to the **document DNA** process: Load, Manage and Access.

- Load: Loaded into the HOV Services Information Vault
- Manage: Organized into discrete and secure databases (one per client), tracked, and audited
- Access: Made accessible to user communities via customized web interfaces (one per client)



This manual, the **document DNA** User Guide, details the Access stage, how documents are organized and how to use the **document DNA** web interface to find, retrieve and manipulate documents.

2 Document Organization

Document organization in [document DNA](#) is structured to provide a secure environment at several levels: Client, Report, Document (via Index Keys), and [User](#)

2.1 Clients

The first level of document organization and security in [document DNA](#) is segregation of data by client. BCERS is provided a unique, password-protected FTP account for secure data transfers and a unique web interface for protected access to their documents.

2.2 Reports

Documents are sorted by reports as a means of separating them into logical categories. The reports that are available for you to access are:

- Benefits
- Legacy
- Administration
- Accounting
- Human Resources
- Retirement Savings Plan

2.3 Index Keys

The main role of index keys is to find stored documents quickly. Index keys can also be used to categorize documents into sub-groups and may be used to limit access to one or more sub-groups.

For the most part, index keys are words, phrases, or numbers found on documents (e.g., SSN, Last Name, Pension Number, etc.). The sample below shows the index keys in the Benefits department. By specifying one or more of these values, users can locate a specific document quickly rather than obtaining a broad range of documents.

The *Benefits* report has been indexed with the following keys. To search for a key, fill in the search criteria and click on the Search button above

Wildcard can only be used as suffix. [i.e. William* and not *William]

Pension #	<input type="text"/>	
SSN	<input type="text"/>	
Last	<input type="text"/>	
First	<input type="text"/>	
DOB [mm/dd/yyyy]	<input type="text"/>	To <input type="text"/>
Document Type	<input type="text"/>	
Sub Type	<input type="text"/>	
Effective Date [mm/dd/yyyy]	<input type="text"/>	To <input type="text"/>
Scan Date [mm/dd/yyyy]	<input type="text"/>	To <input type="text"/>
System Import Date [mm/dd/yyyy]	<input type="text"/>	To <input type="text"/>
Source Type	<input type="text" value="FICHE"/>	
Processed By	<input type="text"/>	
Record Status	<input type="text"/>	
DCN	<input type="text"/>	
DOCID	<input type="text"/>	

2.4 Users

- There are (2) different types of users: Super User and Complete User. Each user group has restricted access to either one or more specific reports.
- The Superuser can web upload documents (the audit trail will show the user that initiated the web uploads) email and update indexes.
- The Complete User can view documents, print, create worklists, and export documents.

Note: help desk administrators (HDA) are permitted to unlock user accounts and reset passwords.

Benefits HDA: Adrian Brown, Angela Jackson, Adrian Jones, Stacy Brown, Jonathan Pearce, and Su Huang

3 Document DNA Web Interface

Document organization and security are tied into the document DNA web interface design.

BCERS Proprietary URL:

- Document organization and security are tied into the document DNA web interface design.
- BCERS level security and site organization is created through a unique URL.
- Production: (https://dna1.documentdna.com/index.jsp?URL_CON TEXT=/bcers)



Login Page

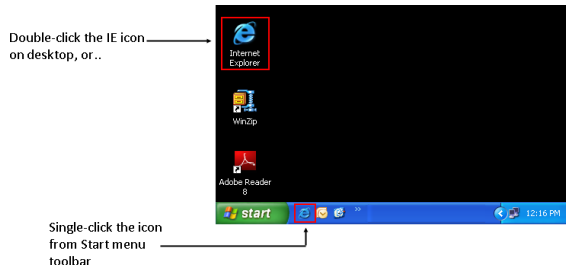
The login procedure serves two purposes:

- a. Validate users
- b. Prepare subsequent website page formats to reflect any access restrictions that apply to the user's profile

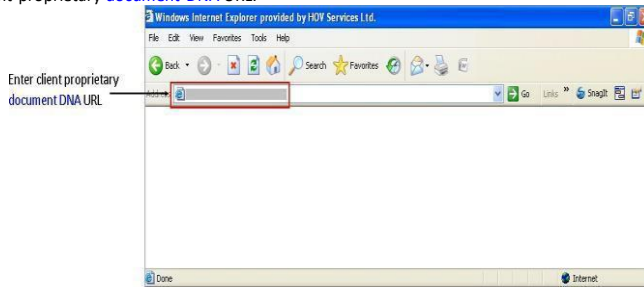


3.1 Login Procedure

Step 1: The document DNA module resides on the web and can be accessed through a browser such as Chrome



Step 2: Access client proprietary document DNA URL.



Step 3: Login


- a. Enter login ID
- b. Enter password
- c. Submit login for validation




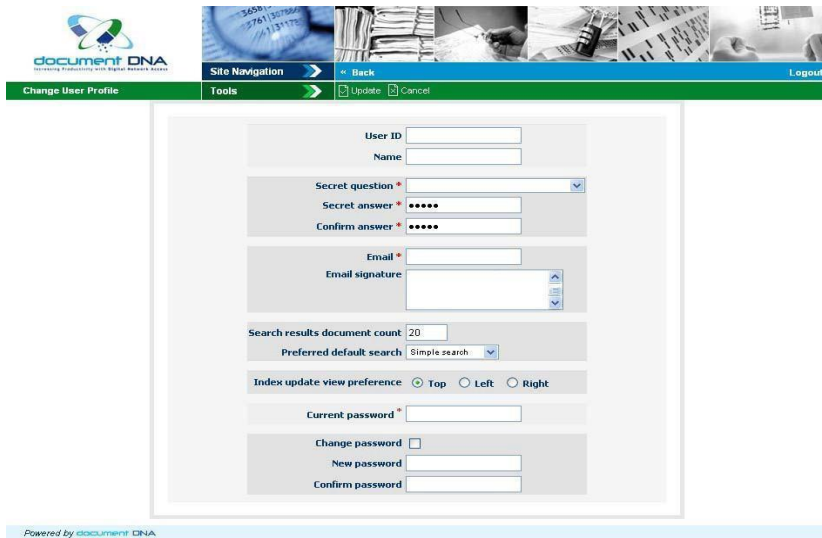
Note: The initial password value for all users is configured per the client's request. After successful login, the user will be prompted to change the temporary password to a confidential value before the system will grant access to the document DNA website.

Note: When the 'Keep me signed in' check box is indicated the system will not completely log the user out from the current session if idle too long. This option will take user back to the Report List page.

3.2 My Profile

Users may update the fields displayed to change their profile, by clicking the  link. This will retain the updated information.

Optional: Click the  link to remove user updates (only if used before clicking update).



document DNA
Site Navigation Back Logout
Change User Profile Tools Update Cancel

User ID
Name
Secret question
Secret answer
Confirm answer
Email
Email signature
Search results document count: 20
Preferred default search: Simple search
Index update view preference: Top Left Right
Current password
Change password
New password
Confirm password

Note: Secret question & secret answer must be completed to utilize the **Forgot your password?** Self-service password reset utility.

3.2.1 Mandatory Password Changes

The system forces a password change under two conditions:

- During the first login
- Every time a password expires

1. Select secret question
 2. Enter secret answer
 3. Enter confirm answer
 4. Enter email address
 5. Enter email signature (optional)
 6. Enter temporary or expired password
 7. Check box to change password
 8. Enter new password
 9. Enter new password again
 10. Click update to finalize changes

To update:

Note: User ID and Name data can only be changed by an Administrator.

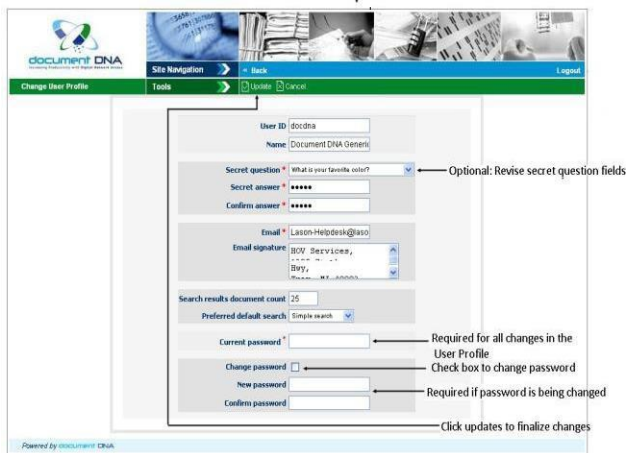
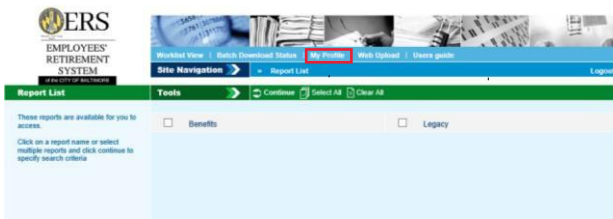
- Step 1: Select a **Secret question** from the drop-down list
- Step 2: Enter the **Secret answer** related to the secret question
- Step 3: Confirm the secret answer by reentering it in **Confirm answer** field
- Step 4: Enter **Email** address
- Step 5: Enter **Email signature** (optional)
- Step 6: Enter temporary or expired password in **Current password** field
- Step 7: Enter **New password**
- Step 8: Confirm the password by reentering it in **Confirm password** field
- Step 9: Click on **Update** to finalize the changes

The Notification window informs the user when the changes have been completed. Users must acknowledge the notification before the system can proceed to the next step. Click on the **Continue** button.



3.2.2 Optional Password Change

To change password or email information at any time, users may open the My Profile window from the document DNA navigation bar.



To update:

- Step 1: Enter current password in **Current password** field
- Step 2: Enter a check mark in the **Change password** field
- Step 3: Enter **New password**
- Step 4: Confirm the password by reentering it in **Confirm password** field
- Step 5: Click on **Update** to finalize the changes

The Notification window informs the user when the changes have been completed. Users must acknowledge the notification before the system can proceed to the next step. Click on the **Continue** button.

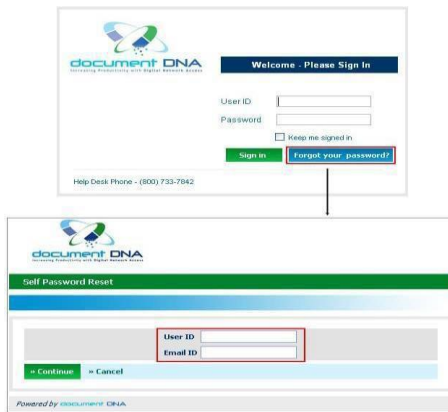


3.2.3 Forgot Password

In document DNA there is a troubleshooting procedure when users are unable to login to the site: **Forgot your password?** This self-service procedure will minimize down time to obtain a password reset.

To utilize the self-service password reset, the user must proceed as follows:

Step 1: Click the **Forgot your password?** button. The Self Password Reset window will display



Step 2: Enter **User ID**

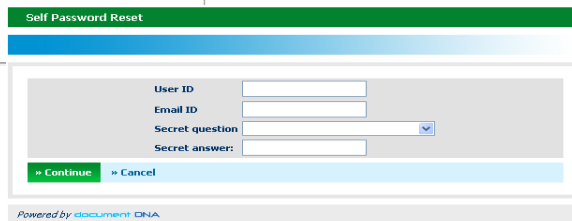
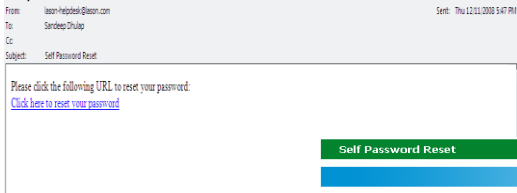
Step 3: Enter **Email ID**

Step 4: Click **Continue**

If the information provided matches the database records; the user will receive an email within two minutes (as displayed below).

Step 5: Click the link displayed in the email to continue.

Step 6: Enter **User ID**



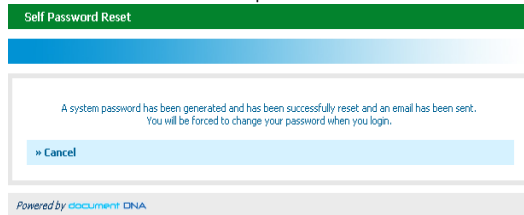
Step 7: Enter **Email ID**

Step 8: Select **Secret question**

Step 9: Enter **Secret answer**

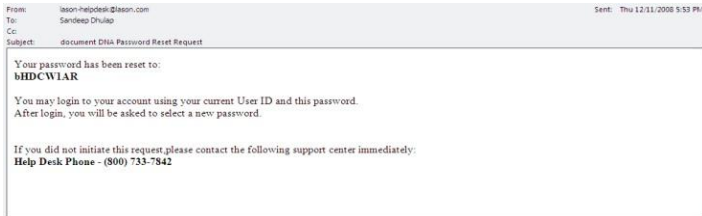
Step 10: Click **Continue**

User will receive another email for the Password Reset request.



Step 11: Click **Cancel**

Note: At login, the user will be forced to complete a mandatory password change (from temporary to a unique user created password).



Note: Contact a benefit help desk administrator if your account is locked and unable to change the password.

3.3 Website Navigation

Navigation within document DNA is best managed within the website by using the navigation bar

» Report List » Search Page » Search Results

Browser webpage navigation

Document DNA webpage navigation

The screenshot shows a web browser window with the URL https://dna1.documentdna.com/index.jsp?URL_CONTEXT=ibces. The browser's address bar and back button are highlighted with a red arrow labeled "Browser webpage navigation". The application's navigation bar is visible, featuring the ERS logo and a menu with options: "Worklist View", "Fetch Download History", "My Profile", and "User Settings". Below this, a blue navigation bar contains "Site Navigation" and "Worklist" menus. A red arrow labeled "Document DNA webpage navigation" points to the "Report List" link in the "Site Navigation" menu. Below the navigation bar, a table displays search results for "REEL DOCS" with columns for Actions, Pension #, Last, First, SSN, Document Type, Sub Type, Effective Date, DOB, and Scan Date.

Actions	Pension #	Last	First	SSN	Document Type	Sub Type	Effective Date	DOB	Scan Date
	24663-24900		PART01		REEL DOCS				
	24663-24900		PART02		REEL DOCS				
	24663-24900		PART03		REEL DOCS				
	24663-24900		PART04		REEL DOCS				

The document DNA navigation toolbar gives users direct access to any page that has been visited during session. If a user has visited all the pages (Report List, Search, and Search Results) the toolbar will list them all as shown:

» Report List » Search Page » Search Results

4 Document DNA Basic User Procedures

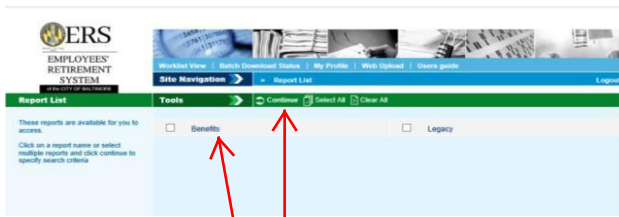
The basic procedure for locating documents within document DNA consists of the following steps:

Step 1: Select one type of reports to search

Step 2: Click on the **Continue** link

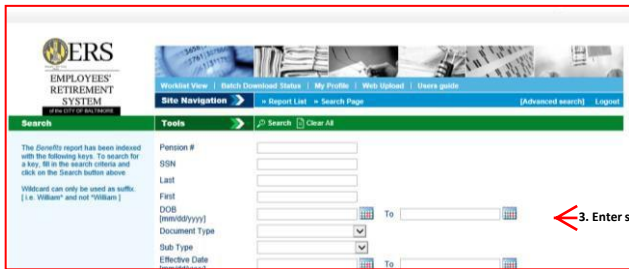
Step 3: Enter search criteria for the applicable index values, and click on the **Search** link Step

4: From the Search Results screen, act on retrieved documents: **View, Export, or Save**

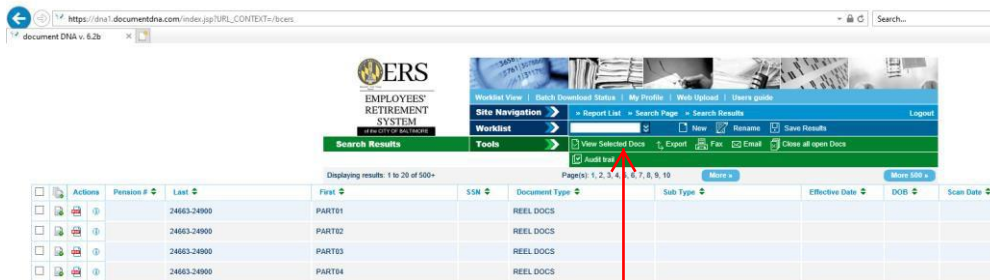


2. Click on continue

1. Select one or more types of report to search



3. Enter search criteria for index values and click on Search.



4. Act on retrieved documents: View, Export, Fax or Save to local disk

4.1 Report Access

- All the reports that a user has access to are shown below
 - [Benefits](#)
 - [Legacy](#)
 - [Administration](#)
 - [Accounting](#)
 - [Human Resources](#)
 - [Retirement Savings Plan](#)

After a successful login, the Report List screen is displayed. All the reports that a user has access to are shown. Reports that are restricted will not appear on the list.

Note: If the customer site has only one report, this screen will be omitted and users will be directed to the Search screen.

About Last Logins:

The last login dialog box displays the Last Successful login and Last Unsuccessful login:

Last Successful login:	Last UnSuccessful login:
------------------------	--------------------------

Last Successful login: Displays the day, date, time, and IP address of the user's last successful login

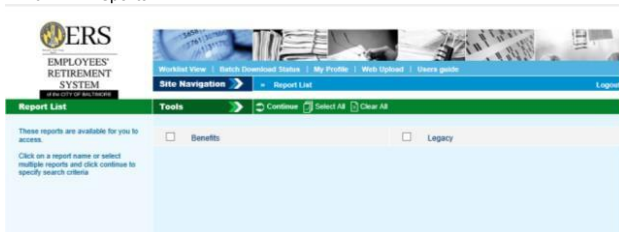
Last Unsuccessful login: Displays the day, date, time and IP address of the user's last unsuccessful login

4.1.1 Report List

The Report List screen appears if there are multiple reports in the website. This page is the start of a document DNA session. Here, the user decides the range of their document search.

Search options are:

- a. A single report
- b. A selected group of reports
- c. All reports



Single Report

To select a single report, click on the name. The name is the hyperlink to the report's index keys.

- ✓ Benefits

Select Reports

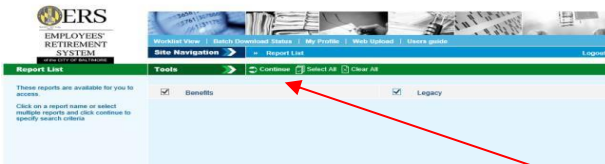
Step 1: Click on the checkbox to select desired reports

- ✓ Human Resources
- ✓ Admin
- ✓ Accounting
- ✓ Benefits
- ✓ Legacy
- ✓ Retirement Savings Plan

Step 2: Click on the link to proceed



Note: The checkboxes are toggle switches. To remove a checkmark, click on it again.



1. Click once in the checkbox to make a selection

2. Click continue to proceed

5 Search

For each report in the Report List screen, there is a corresponding Search screen.

The Search screen lists all the index keys that are available for the report. Index keys can be searched on individually or collectively.

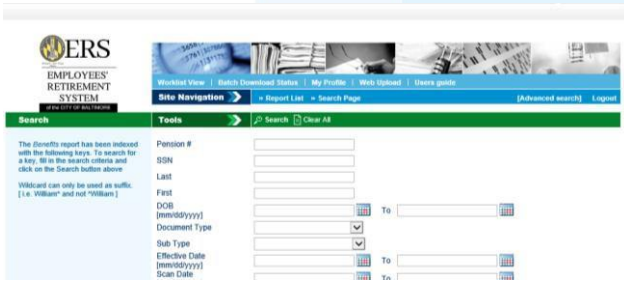
If a single report is selected, the user will see the index keys for only that report.

For Example: Click on Benefits

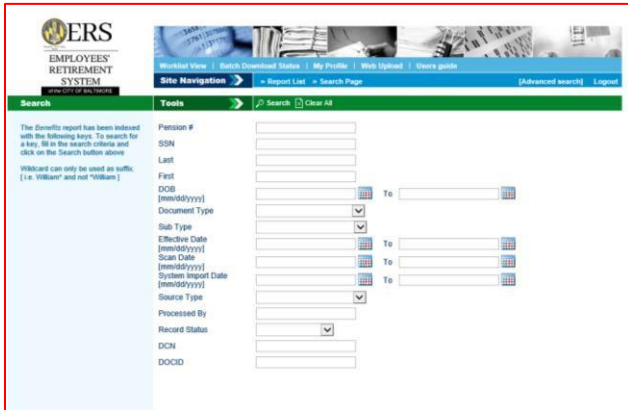
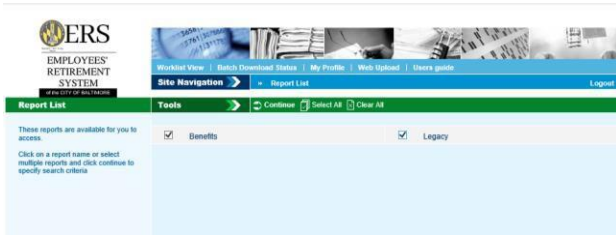
The user will view all indexes for the Benefits department only.

Click on Benefits and Legacy

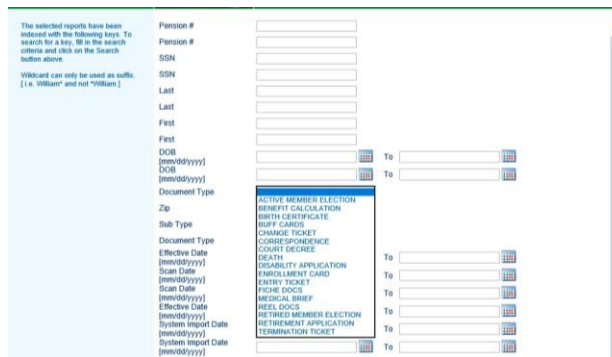
The user will view all indexes for Benefits and Legacy



If multiple reports are selected, the user will see the combined index keys in a single Search screen.



Drop down lists are used in cases where there are multiple selections and may vary in length. If there are too many values for the size of the window, a vertical scrollbar will support user navigation.




5.1 Search Options

There are four index key data types in document DNA: text, date, number and currency. Each type has its own search options.

Text

The most common index key used in reports is text. Text field accepts alpha/numeric values and trailing wildcards.

- a. To search for a text type index key, fill in the search criteria and click on the  link.


Last

For more general searches, users may insert the string substitution asterisk "*" wildcard, however, the wildcard can only be used as suffix, (e.g., W*).

Last

Example: means that the user is searching for every Member Name that begins with a "W" regardless of how many characters there might be in the name.

The reports that the users select have been indexed with keys. To search for a key, fill in the search criteria and click on the Search button. Wildcard can only be used as a suffix.

Pension #	<input type="text" value="401319"/>
SSN	<input type="text"/>
Last	<input type="text"/>
First	<input type="text"/>
DOB [mm/dd/yyyy]	<input type="text"/> 

- Type Pension # in the index box, the system will locate all documents with that pension #
- Type W* (wildcard) in the index box for first name: the user is searching for every member that begins with a "W" regardless of how many characters in the name.
- Type SSN in the index box, the system will locate all documents with the SSN



Type DOB in the index box, the system will locate all documents with the DOB


Date

When a date field is formatted in the document DNA default of MM/DD/YYYY, there are two options:

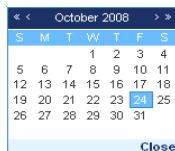
- a. Search on a specific date
- b. Search on a range of dates

Users may type dates into the **From** and **To** fields from their keyboard or use the **calendar tool**.



Date [mm/dd/yyyy]  To 


 **Calendar Tool**

When using the **Calendar Tool**, a calendar window displays to help format the date. The default is the current date.



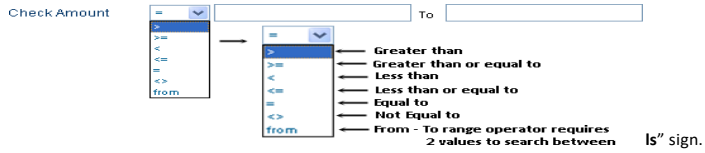
To change the year, click on  to decrease the value or  to increase it

To change the month, click on  to decrease the value or  to increase it

To pick a day, click on the numbered titles, ie. 

Number and Currency

Searches on numbers and currency are assisted by a list of standard relational symbols. To see the list of operators, click on the drop-down arrow next to the highlighted "equals" sign.



The operators listed on the left side of the drop-down list only work with single numerical values. If a second number is entered in the **To** field, it will be ignored. The only operator that needs two numbers is the **From** operator. **From** is the only operator that searches for a range of values. The same relational operators are used for currency data

Error Message

No Documents Found

Pension #	<input type="text" value="1234"/>
SSN	<input type="text"/>
Last	<input type="text"/>
First	<input type="text"/>
DOB [mm/dd/yyyy]	<input type="text"/>
Document Type	<input type="text" value="v"/>

If no documents match the user's search criteria, the message "No Documents Found" will appear above the index keys.

The user can then modify the search criteria in the same screen and click **Search** again. If the new search is successful, the error message will disappear, and results will be returned.

If the message persists, it means that there are no matches to the revised search criteria, or the user is attempting to access restricted data.

Note: Users may exit this page by clicking the [» Report List](#) link on the document DNA toolbar.

5.2 Search Results

The Search Results screen contains documents returned from the search and the tools for working on them. The documents are displayed in a matrix of index values. All index keys are displayed. If there are too many columns for the user's display settings, a horizontal scrollbar is shown to provide access to all the columns.

1. Document Operations Toolbar
 2. Index Key Titles
 3. Index Key Values
 4. View Topic Information
 5. View PDF Image Document
 6. Add Document to a Worklist
 7. Checkbox for selecting a document (View, Export, Fax, Email, etc.)

1. Document Operations Toolbar
 2. Index Key Titles
 3. Index Key Values
 4. View Topic Information
 5. View PDF Image Document
 6. Add Document to a Worklist
 7. Checkbox for selecting a document (View, Export, Fax, Email, etc.)

Document Access Tools:


The Search Results screen can accommodate 20 documents at a time (by default). If more than 20 documents are retrieved, the first 20 are displayed, and links to the remaining groups of 20 are listed below the **Green Document Operations Toolbar**. The default setting can be adjusted in the user's My Profile screen to values between 10-500. However, a value of no more than 250 is recommended as the user may experience a delay for return results.

- Click on the numbered Page(s): [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#), [9](#), [10](#) to update the screen display to the desired documents set.



Click on a numbered hyperlink to update the screen display to the desired document set.

Sorting the Search Results List:

An index key, noted by this icon , is specified for default sorting at the time of report creation. A user can resort the list on any index value by clicking on the arrows in the column header.

Accession	Personnel #	Last	First	SSN	Investment Type
004676	RAY	RAY	WANDA	20040016	FICHAE DODD
014000	RAY	RAY	WELYN	20074100	FICHAE DODD
004676	RAY	RAY	WANDA	21000001	FICHAE DODD
014007	RAY	RAY	ROBERT	21000000	CHARGE TICKET
014007	RAY	RAY	ROBERT	21000000	CHARGE TICKET

Accession	Personnel #	Last	First	SSN	Investment Type
000007	WALSON	WALSON	DEBORAH	21000007	ACTIVE MEMBER ELECTION
011000	WALSON	WALSON	DEBORAH	21000000	ACTIVE MEMBER ELECTION
014007	WALSON	WALSON	MARSH	21000102	ACTIVE MEMBER ELECTION
000004	WALSON	WALSON	YVONNE	21000000	ACTIVE MEMBER ELECTION
007000	WALSON	WALSON	LINDA	20070000	ACTIVE MEMBER ELECTION
007000	WALSON	WALSON	KIMBERLY	21000000	ACTIVE MEMBER ELECTION
009007	WALSON	WALSON	JEFFREY	21000007	ACTIVE MEMBER ELECTION
007100	WALSON	WALSON	CHRISTIE	20000007	ACTIVE MEMBER ELECTION
007000	WALSON	WALSON	ANDREW	21000100	ACTIVE MEMBER ELECTION
007000	WALSON	WALSON	DAVID	21000002	ACTIVE MEMBER ELECTION

6 Advanced Search

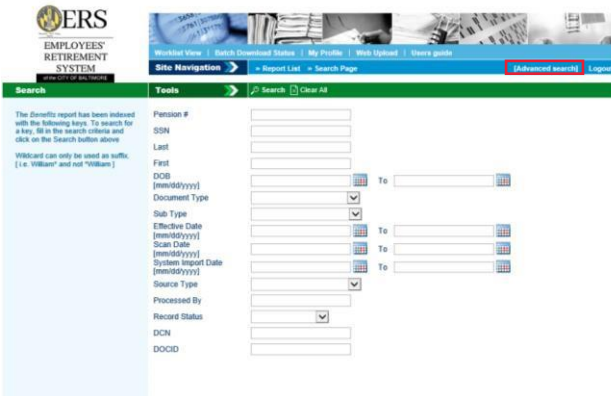
The Advanced Search allows the user to perform a search based on **AND/OR** criteria. The Advanced Search also supports for **IN, NOT IN, NOT EQUAL TO** queries depending on the data and type of indices. It supports blank value search, sort on multiple indices, and has the ability to save queries for future use. Users may also choose their preferred screen, **Simple Search** [default search page] or the **Advance Search** page by updating their profile. To go to the **Advanced Search**, follow the steps noted below:

Step 1: Select any report(s) from the Report List page

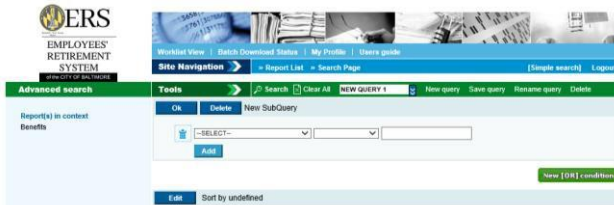
Step 2: Click on the report name link and click  the default Search screen



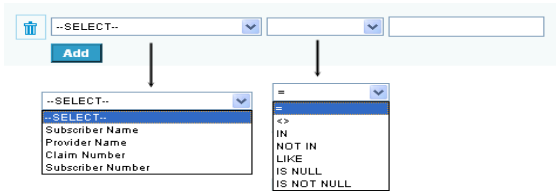
Step 3: The Advance Search option displays at the top right of the default Search screen



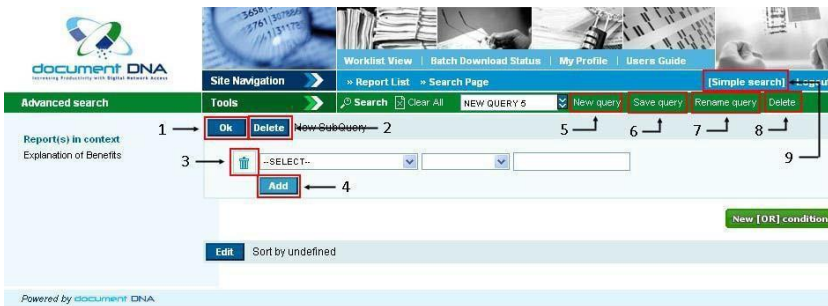
Step 4: Click on the **Advance Search** link, Advance Search page populates



Step 5: The Advance Search allows the user to perform a search based on **AND/OR** criteria. Search criteria can be selected from the drop-down list



Step 6: Advanced Search also supports for IN, NOT IN, NOT EQUAL TO queries depending on the data and type of indices. It supports blank value search, sort on multiple indices, and has the ability to save queries for future use.



1. To apply changes
2. To delete condition
3. To remove topic search definition
4. To add topic search definition
5. To add New query
6. To Save the query
7. To rename the existing query
8. To delete the query
9. Go back to simple search

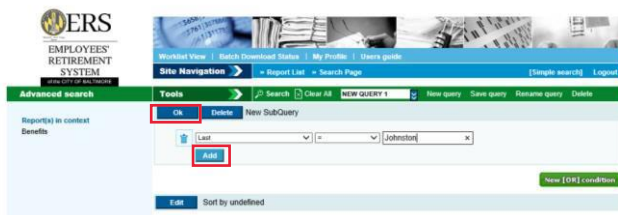
Create a Query:

Step 1: The default setting is set to create a new query; this is displayed in the drop-down list. The default name is 'NEW QUERY 1'. If NEW QUERY 1 has already been used, then the number will be incremented to the next available number.

Step 2: Select the required criteria fields.

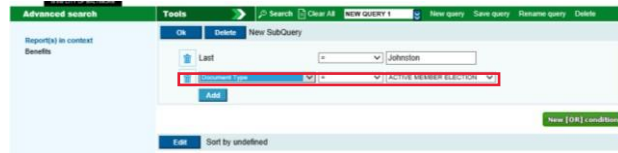
- o Index key (these will be the same default search)
- o Relational symbols (=, <>, IN, NOT IN, LIKE, IS NULL, IS NOT NULL)
- o Identify data from the documents to search, (e.g., Subscriber Name = **Langston**)

Step 3: Click on the **Ok** button to apply



Add a Sub-query:

To add additional criteria within the same sub-query on a different index key, click on the **Add** button (the index keys that were not used in the previous sub-query will appear as choices).



Add the [OR] condition:

Users can create a sub-query with an OR condition by using the **New [OR] condition** button.

Step 1: Create a query

Step 2: Click on the **New [OR] condition** button

Step 3: Select the required criteria fields.

- a. Index key (these will be the same default search)
- b. Relational symbols (=, <>, IN, NOT IN, LIKE, IS NULL, IS NOT NULL)
- c. Identify data from the documents to search, (e.g., Subscriber Name = **Langston**)

Step 4: Click on the **Ok** button to apply

The example below displays a user looking for blank or \$0.00 check amounts:Sub-query 1

- Index key (Check Amount)
- Relational symbols (=)
- Identify data from the documents to search (IS NULL)

Sub-query 2

- Index key (Check Amount)
- Relational symbols (=)
- Identify data from the documents to search (0.00)




Edit a Query

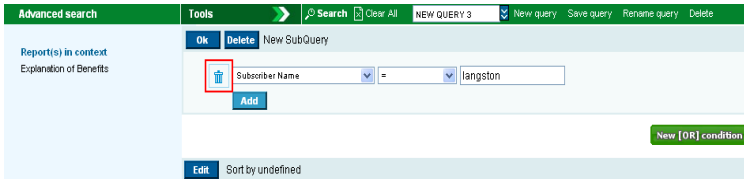
Step 1: To edit the selected criteria, click the **Edit** button that describes the search criteria selected. In the example below the selected parameters are:

- a. Index key (Subscriber Name)
- b. Relational symbols (=)
- c. Data from the documents to search (**Langston**)



Step 2: User will have access to the edit the query

Step 3: To remove a sub-query, click on the  icon. The current topic search condition will be removed, confirm via the dialog pop-up box



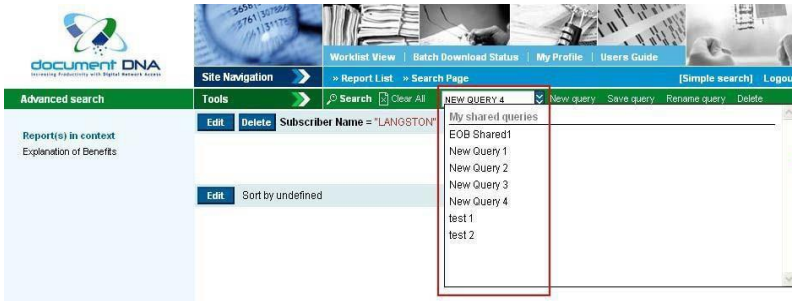
Step 4: Click on the **Cancel** button to remove any changes

Step 5: Click on the **Delete** button to delete the current selected criteria in the sub-query



Save Query:

When the criteria for the query have been completed, click on the **Save query** link. **NEW QUERY 4**



Rename Query:

To rename the query, click on **Rename query** link. The highlighted field becomes activated; enter a unique name to rename the query.

Note: A query cannot be renamed until after the sub-query has been created and saved.



7 Text Search

The **Text Search** function allows the user to search within text documents for specific patterns that are not already designated as index keys. Text Search may be available on the entire document, or solely specific regions of a document as specified during report configuration.

It is important to note that users must specify at least one search criteria (e.g., an index search value) in order to also specify a text search pattern. Use of a date or date range, whenever possible, will reduce query time and will take search priority before the index key search criteria.

Text search (for text-based documents) enables users to search for text patterns across all documents:

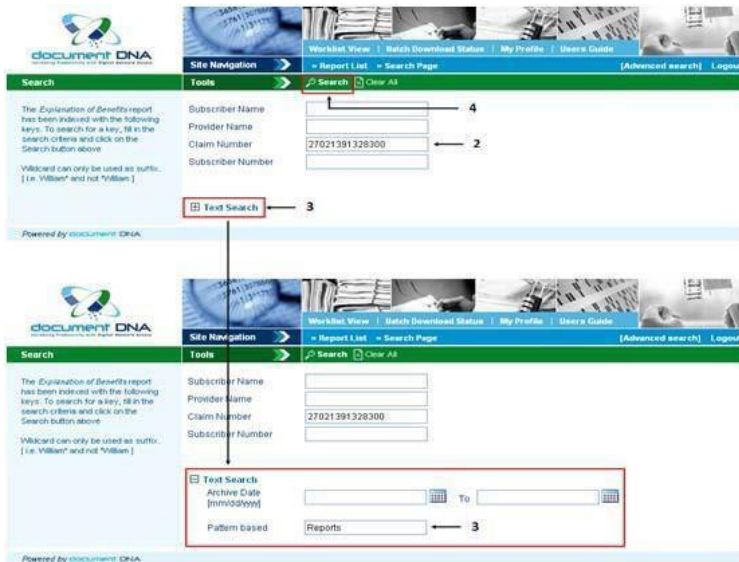
- Returned by search criteria for at least one index field
- Archived in a given date range
- On a specific region of the text page (where a policy or region is defined)

To view the Text Search details follow the steps given below:

Step 1: On the Report list page the user must choose a report that has text documents loaded, and click **Continue**, (the Search Page will display the Text Search option as noted in image below)

Step 2: Enter index key criteria to narrow the query of the document search

Step 3: Enter the Pattern based text search criteria (or date range)




Step 4: Click on **Search** link

Step 5: Search results screen is displayed

Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber
	Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328300	099999901

8 Document Operations

Document Details:

For each document, there is a list of properties or details. To see the properties, click the **information icon**  on the line of the desired document.

Actions	Permissions	Last	First	Document Type
	VIEW	12/15/2020	JACQUES	BUFF CARD
	VIEW	12/15/2020	JACQUES	BUFF CARD
	VIEW	12/15/2020	JACQUES	MEMBERSHIP CARD
	VIEW	12/15/2020	JACQUES	MEMBER TICKET
	VIEW	12/15/2020	JACQUES	MEMBER TICKET

Index Update

Report ID: BCE01
 Report Name: Benefits
 Report Version: 12/15/2020 12:02:37
 Batch ID: NORCE-00330000001
 System ID: 2374661
 Application Name: TDFZ
 Pages: 1




INDEX FIELDS

INDEX FIELDS	CURRENT INDEX VALUE	NEW INDEX VALUE
Report Number, Date, or Currency	2/25/20	2/25/20
Doc Size in pages	210/2653	210/2653
Doc ID	LITTLE	LITTLE
Last	SHELLAE	SHELLAE
First	SHELLAE	SHELLAE
DOB	11/10/1958	11/10/1958
Document Type	ACTIVE MEMBER ELECTION	ACTIVE MEMBER ELECTION
Sub Type		
Effective Date		
Scan Date		
System Import Date	12/15/2020	12/15/2020
Source Type	PAPER	PAPER
Processed By	EXELA	EXELA
DICN	COMPLETE	COMPLETE
DICN	2020350BCERS00000257	

Buttons: Update, Delete, Close

8.1 View Documents

To view a single document present in the report list, users can click on the applicable view document icon in the Actions field. Document types are represented by the following icons:

-  Text Document (TXT, ASP, DJDE, EBCDIC)
-  Associated Documents (documents associated with MS Office, e.g., Word & Excel)
-  Image Document (PDF, TIF, JPG)

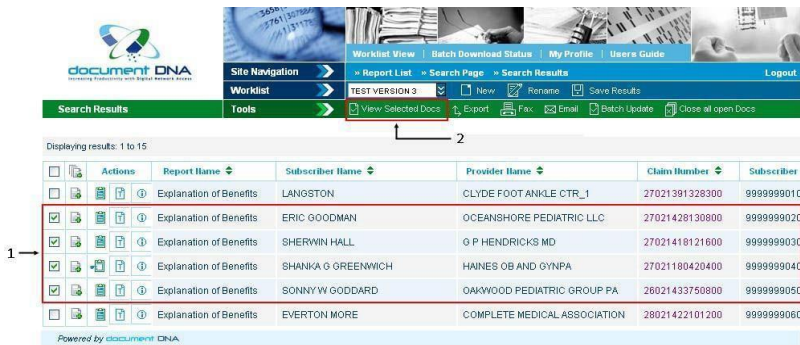
Note: Text documents are viewed in PDF format.

8.1.1 Adobe Acrobat Options / Viewing Documents

The **View Selected Docs** function makes it possible to review documents more efficiently by giving user the ability to open several documents for viewing at one time by:

- a. Reviewing them as separate documents
- b. Navigating through individual documents by groups of pages rather than one page at a time

Step 1: Select documents for viewing by clicking in the applicable check boxes



Step 2: Click the **View Selected Docs** link to open the View Selected Documents – Options window

In the **View as** section users choose:

Step 3: Which **data type** to open the documents

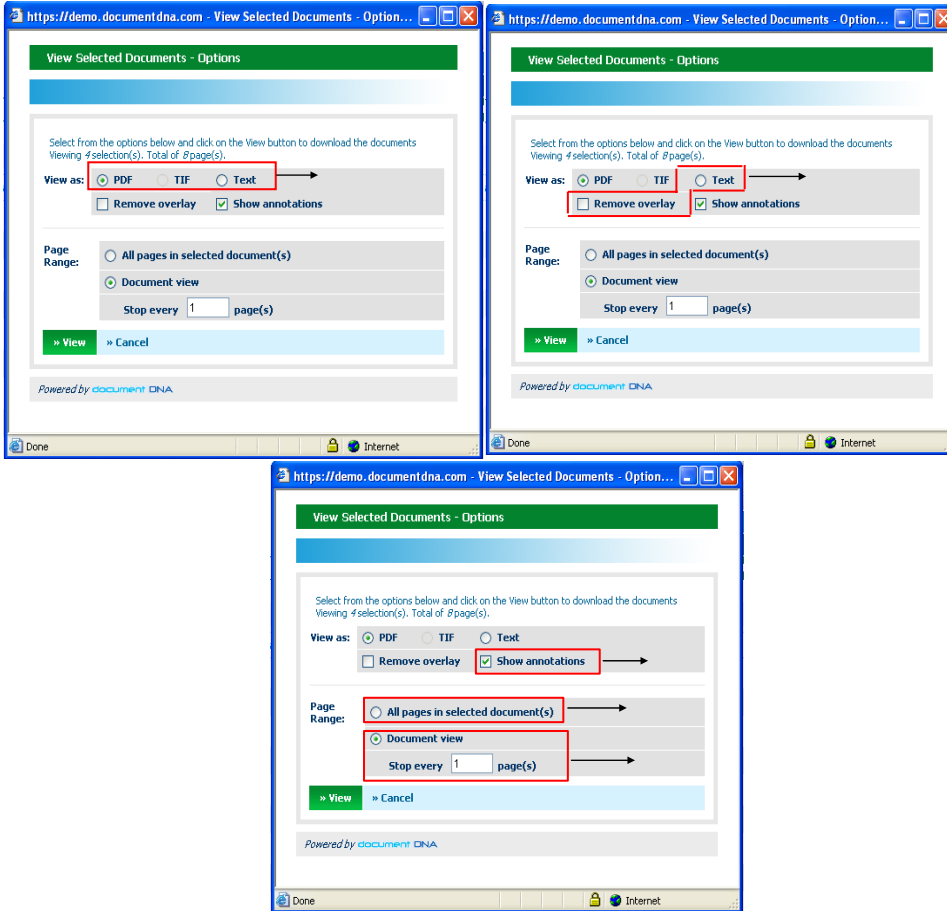
In the **Page Range** section users choose:

Step 4: All pages in selected document(s), (merges all docs selected into one PDF)

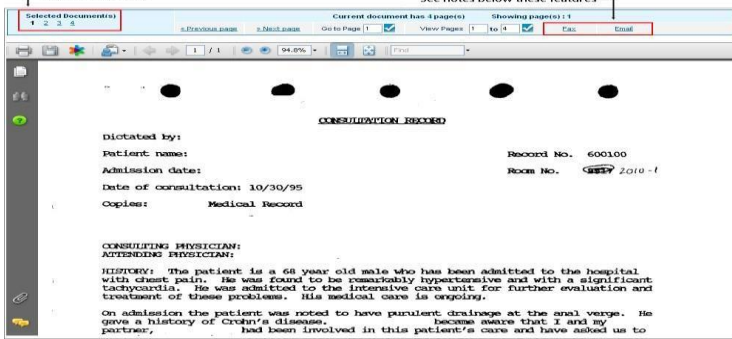
Step 5: **Document view**, (view each document as a separate PDF)

Stop every page(s). (if data is on a specific page in a group, select a reference page)

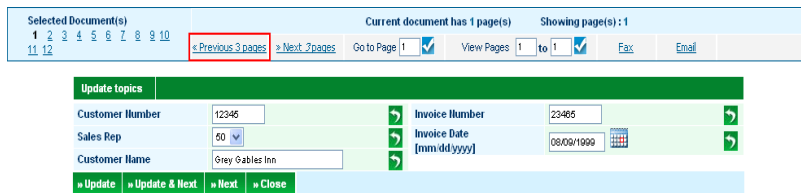
Step 6: Click **View** button



Step 9: The first page of the first document is displayed. Click on the **Next** button to see the second page in the first document.

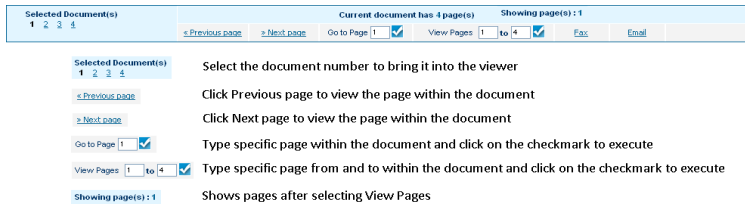


Example of Document View with Stop Every 3_Pages:



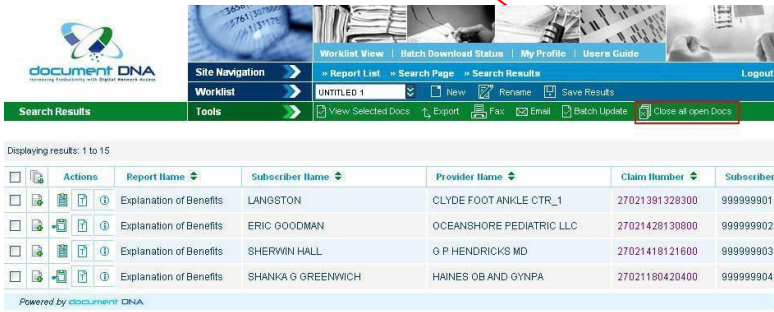
Note: If the customer has requested the Fax or Email features to be enabled, users will be able to perform these functions from this screen.

Document View Features















Close All Open Documents

To close all open documents, click on the  link as shown below:



The screenshot shows the document DNA interface. At the top, there is a navigation bar with the following items: Site Navigation, Report List, Search Page, Search Results, and Logout. Below this is a Worklist section with a dropdown menu showing 'UNTITLED 1' and buttons for New, Rename, and Save Results. At the bottom of the Worklist section, there is a 'Tools' bar with buttons for View Selected Docs, Export, Fax, Email, Batch Update, and Close all open Docs. The 'Close all open Docs' button is highlighted with a red box and a red arrow pointing to it from the text above.

Displaying results: 1 to 15

Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber I
  	Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328300	9999999010
  	Explanation of Benefits	ERIC GOODMAN	OCEANSHORE PEDIATRIC LLC	27021428130800	9999999020
  	Explanation of Benefits	SHERWIN HALL	G P HENDRICKS MD	27021418121600	9999999030
  	Explanation of Benefits	SHANKA G GREENWICH	HAINES OB AND GYNPA	27021180420400	9999999040


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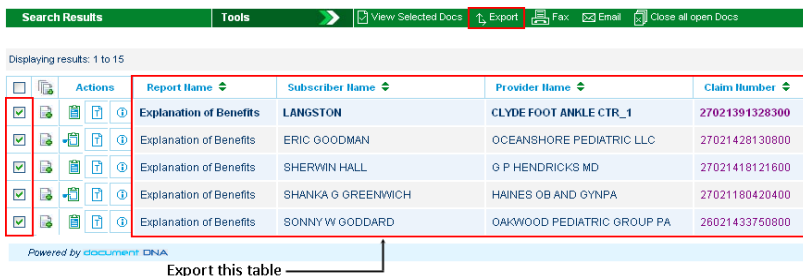
8.2 Export Data

The Export tool provides two options for exporting document DNA data as CSV files and XML files:

- Export the search results list (entire search results or selected documents)
- Export data extracted from the documents (COLD data only, not scanned images)

Export Search Results List:

Step 1: Select the desired documents by indicating the check boxes and click on the  link.



Search Results Tools View Selected Docs Export Fax Email Close all open Docs

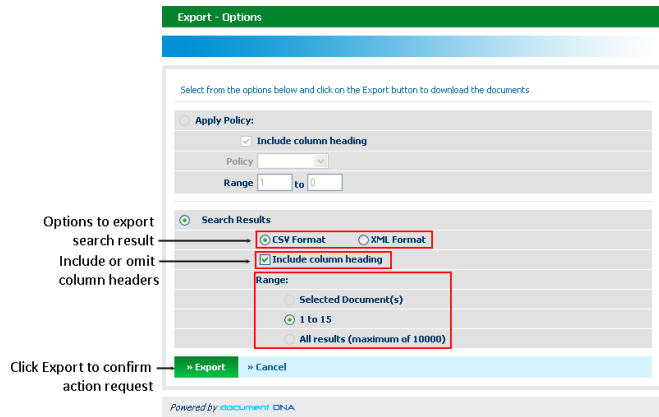
Displaying results: 1 to 15

Actions	Report Name	Subscriber Name	Provider Name	Claim Number
<input checked="" type="checkbox"/>	Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328300
<input checked="" type="checkbox"/>	Explanation of Benefits	ERIC GOODMAN	OCEANSHORE PEDIATRIC LLC	27021428130800
<input checked="" type="checkbox"/>	Explanation of Benefits	SHERWIN HALL	O P HENDRICKS MD	27021418121600
<input checked="" type="checkbox"/>	Explanation of Benefits	SHANKA G GREENWICH	HAINES OB AND GYNPA	27021180420400
<input checked="" type="checkbox"/>	Explanation of Benefits	SONNY W GODDARD	OAKWOOD PEDIATRIC GROUP PA	26021433750800

Powered by document DNA

Export this table

Step 2: **Export** - Options screen will populate.



Export - Options

Select from the options below and click on the Export button to download the documents

Apply Policy:

Include column heading

Policy: [dropdown]

Range: [1] to [0]

Search Results

CSV Format XML Format

Include column heading

Range:

Selected Document(s)

1 to 15

All results (maximum of 10000)

Options to export search result

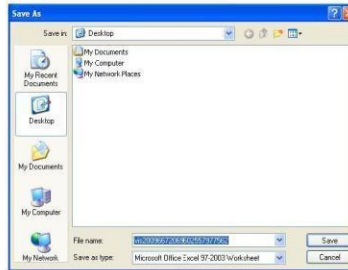
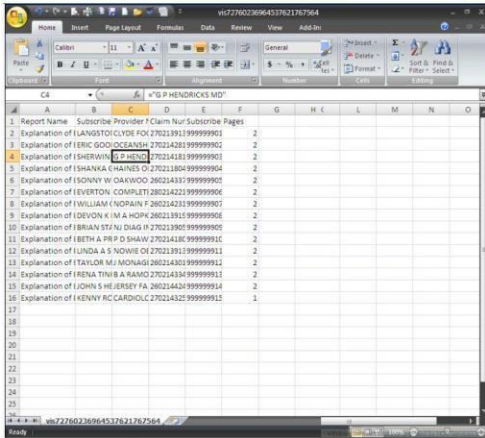
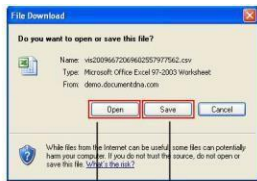
Include or omit column headers

Click Export to confirm action request

Powered by document DNA

Note: The **Export** option can accommodate a maximum of 10,000 documents at a time.

Step 3: Choose from Open, Save and Cancel



Export COLD Document Data:

If available, this optional feature performs a second level search into documents selected from the search results list and extracts pre-defined fields of text data. The data is then formatted as a CSV file and can be downloaded using the same procedure as for the Search Results List.

The set of search rules for this option is called a policy. One or more policies can be defined per report. Each policy contains instructions for identifying and reading different sets of data fields. For example, a bank report contains documents that are formatted as shown below.

NORTH AMERICAN BANKING CO												PAGE 1	
DAILY PENDING TRANSACTION RELEASE REPORT												PRINTED ON 06-25-94	
												TIME - 01:36	
CO	ACCT	COBT	TRN	TRN	TRAN	EFF	EMPL-VEND	EXEC-EMPL	EXTERNAL	SRC	TRANSACTION	TRANSACTION	INTERNAL
NO	NUMBER	CENTER	CODE	TYPE	DATE	DATE	NUMBER	NUMBER	DOC	NBR	AMOUNT	DESCRIPTION	DOC NBR
10	109042	1099	01	0	062494	062494	0	0	1769024	500	35.19	FROM CL POSTING	941750001
10	242404	1099	02	0	062594	062494	0	0	1769031	600	712.75		941750002
10	242537	1099	02	0	062594	062494	0	0	1769023	200	79.68		941750003
10	411058	1095	02	0	062494	062494	0	0	1769025	500	29.02	FROM CL POSTING	941750004
10	411256	1095	02	0	062494	062494	0	0	1769027	500	6.17	FROM CL POSTING	941750005
10	620203	1095	01	0	062594	062494	0	0	1769032	200	79.68	INTEREST BARNED TODAY 000	03941750006
10	650804	1060	01	0	062594	062494	0	0	1769028	600	271.50		941750007
10	652008	1060	01	0	062594	062494	0	0	1769029	600	77.95		941750008
10	653063	1060	01	0	062594	062494	0	0	1769030	600	363.30		941750009
n TOTALS DEBIT = 827.62 CREDIT = 627.62 RETRO-DR = .00 RETRO-CR = .00													

8.3 Email Documents

This feature is optional based on customer requirements, and may therefore not be available for all users.

There are 2 ways to email documents from document DNA:

- a. As an attachment with user's email, or
- b. As a link to the document

Attachments are sent as PDF files, one PDF file per email. If more than one document is selected, all the documents are merged into one PDF file.

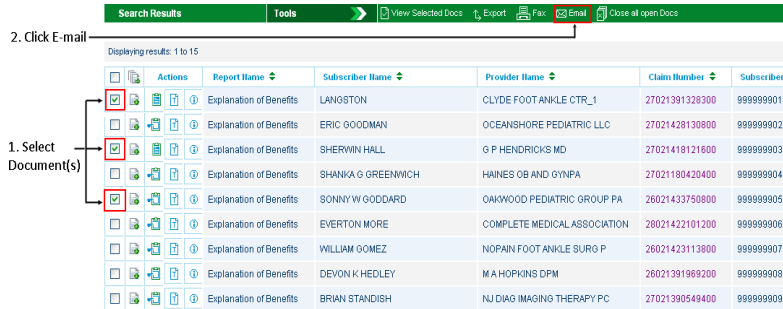
If there is an attachment size limit imposed on the email recipient, it is best to send URL links for documents that may exceed the limit. If several documents are selected, each document will have its own link. The secure link restricts the recipient to viewing only the document specified and provides no access to view any other documents on the document DNA site.

Email Attachments:

Step 1: Select documents to be emailed

Step 2: Click the  link

2. Click E-mail



1. Select Document(s)

Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber
	Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328300	9999999010
	Explanation of Benefits	ERIC GOODMAN	OCEANSHORE PEDIATRIC LLC	27021428130800	9999999020
	Explanation of Benefits	SHERWIN HALL	G P HENDRICKS MD	27021418121600	9999999030
	Explanation of Benefits	SHANIKIA G GREENWICH	HAINES OB AND GYNPA	27021180420400	9999999040
	Explanation of Benefits	SONNY W GODDARD	OAKWOOD PEDIATRIC GROUP PA	26021433750800	9999999050
	Explanation of Benefits	EVERTON MORE	COMPLETE MEDICAL ASSOCIATION	26021422101200	9999999060
	Explanation of Benefits	WILLIAM OOMEZ	NOPAIN FOOT ANKLE SURG P	26021423113800	9999999070
	Explanation of Benefits	DEVON K HEDLEY	M A HOPKINS DPM	26021391989200	9999999080
	Explanation of Benefits	BRIAN STANDISH	NJ DIAG IMAGING THERAPY PC	27021390549400	9999999090

Step 3: To set options for sending documents as **attachments**:

The screenshot shows the 'Email Selected Documents - Options' dialog box. Annotations include:

- Sender's e-mail address taken from "My Profile"**: Points to the 'From' field.
- Separate multiple recipients with commas or semicolons**: Points to the 'To', 'CC', and 'BC' fields.
- Enter a subject line**: Points to the 'Subject' field.
- Select to send attachment as PDF file**: Points to the 'Send documents as attachments' radio button.
- Enter a message**: Points to the 'Comments' text area.
- Optional: Add e-mail signature (taken from "My Profile")**: Points to the 'Add Signature' checkbox.
- Select to send the PDF attachment in zip format. Users can also protect the zip file with a password, (10 characters or less).**: Points to the 'zip format' and 'Password protect' options.

For [Address Book](#) instructions click the link.

Optional: Select to send the PDF attachment in zip format. Users can also protect the zip file with a password, (10 characters or less).

Step 4: Click **Send**

Step 5: Close confirmation window

The screenshot shows a confirmation window titled 'Email Sent Successfully' with a green header and a 'Close' button.

The recipient will receive an email as shown below with a PDF attachment. Use Adobe Acrobat to open the PDF attachment for viewing.

The screenshot shows an email received in a client. The header includes: From: Document DNA Generic user [autogenemail@documentdna.com], To: Richard Houston, Subject: test, and Sent: Wed 10/29/2008 2:31 PM. The body contains the text 'Test' and a message icon for '1323.pdf (60 KB)'.

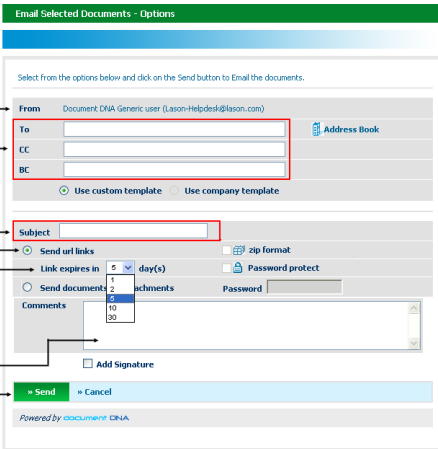
Email URL Links:

The procedure for emailing documents with URL links is the same as sending attachments, with the exception of changing the delivery mode from attachment to URL link.

Step 1: Select documents to be emailed

Step 2: Click the  Email link

Step 3: To set options for sending documents as **attachments**:

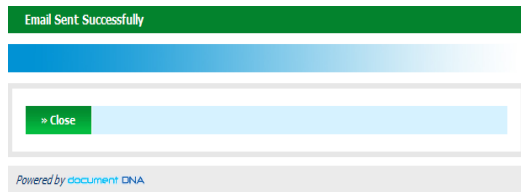


The screenshot shows the 'Email Selected Documents - Options' dialog box. Annotations on the left side point to various fields and options:

- Sender's e-mail address taken from "My Profile"**: Points to the 'From' field.
- Separate multiple recipients with either commas or semicolons**: Points to the 'To', 'CC', and 'BC' fields.
- Enter a subject line**: Points to the 'Subject' field.
- Select the URL link option**: Points to the 'Send url links' radio button.
- Set the number of days before the link expires. (Default= 5 calendar days)**: Points to the 'Link expires in' dropdown menu.
- Enter a message**: Points to the 'Comments' text area.
- Click Send to proceed**: Points to the 'Send' button.

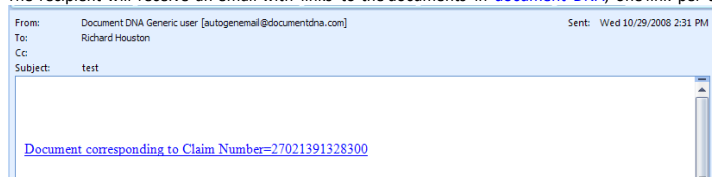
Step 4: Click **Send**

Step 5: Close confirmation window



The screenshot shows a confirmation window titled 'Email Sent Successfully'. It features a green header bar, a light blue background, and a single 'Close' button. At the bottom, it says 'Powered by document DNA'.

The recipient will receive an email with links to the documents in **document DNA**, one link per document.



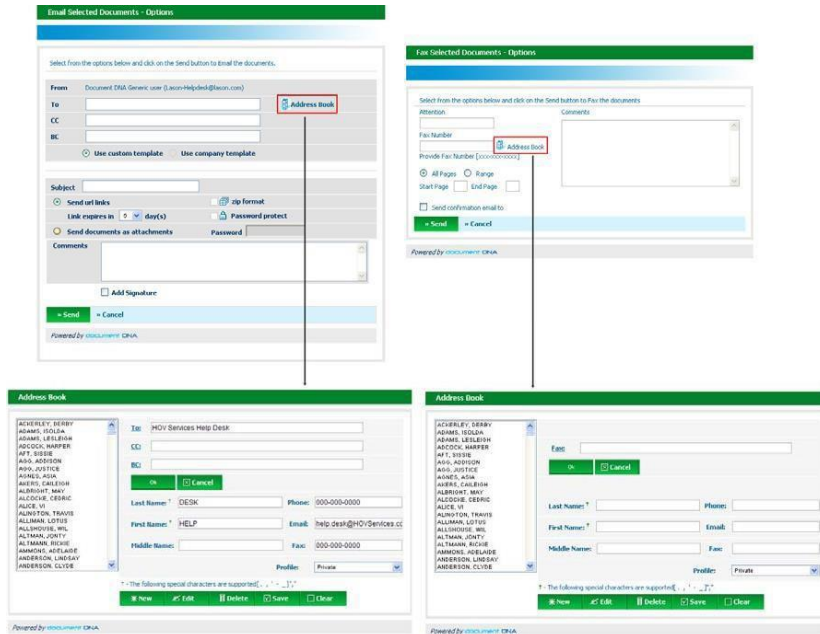
The screenshot shows an email header with the following details:

- From:** Document DNA Generic user [autogenemail@documentdna.com]
- To:** Richard Houston
- Cc:**
- Subject:** test
- Sent:** Wed 10/29/2008 2:31 PM

The body of the email contains a single blue hyperlink: [Document corresponding to Claim Number=27021391328300](#)

8.4 Address Book

The Address Book feature allows the user to store frequently used email addresses and fax numbers.



Create New Profile

To create a New contact, perform the following steps:

Step 1: Enter the contact information in the applicable fields

Step 2: Select the Profile Type (Public/Private) from the drop-down list

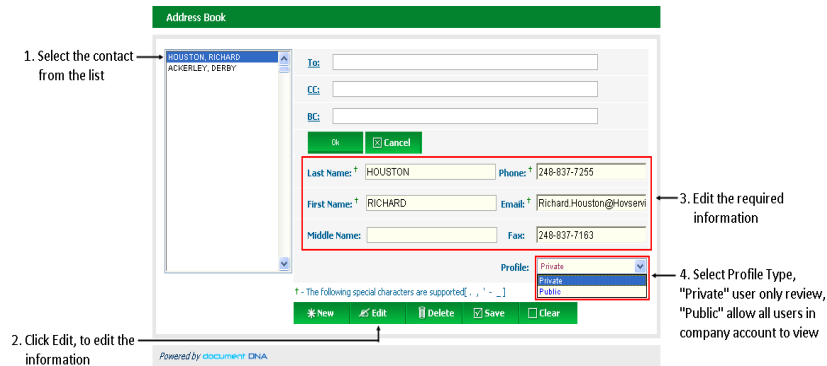
Step 3: Click **New** to add to the address book



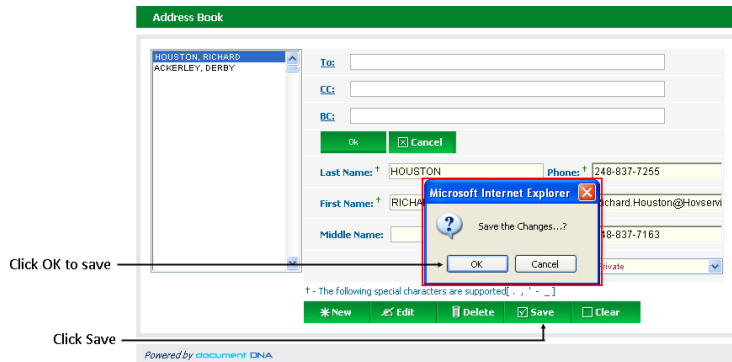
Edit Profile

To Edit a contact, perform the following steps:

- Step 1: Select the contact from the list
- Step 2: Click to the **Edit** button
- Step 3: Edit the applicable information
- Step 4: Edit the Profile Type if desired



Step 5: Click **Save**

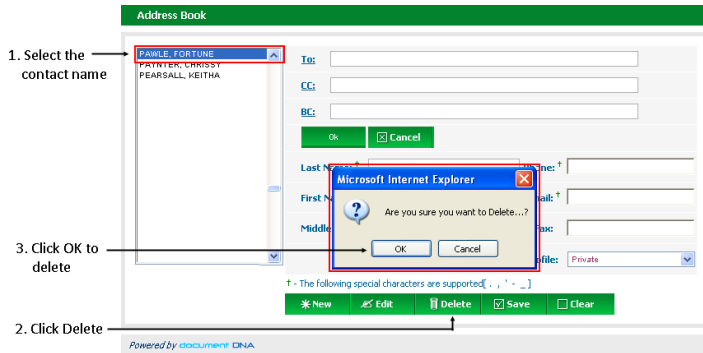


Note: Users can click on the **Clear** button when creating a new profile or while editing an existing profile to remove current updates.

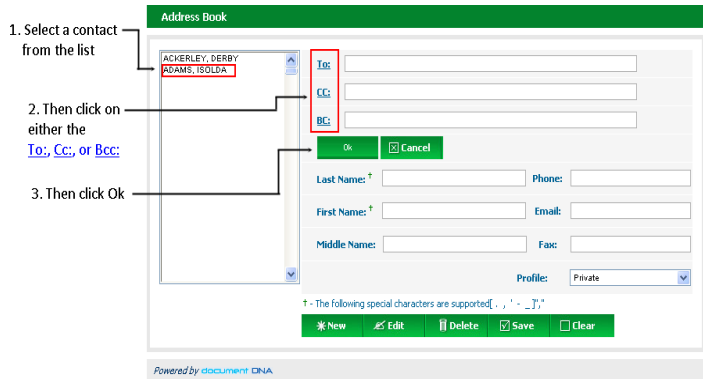
Delete Profile

To Delete contact information from the address list, perform the following steps:

- Step 1: Select the contact name
- Step 2: Click the **Delete** button
- Step 3: Delete dialogue box will display, click Ok to confirm deletion

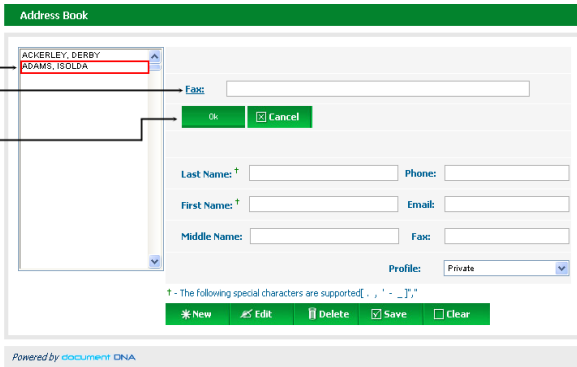


Email – Address Book Page



Fax – Address Book Page

1. Select a contact from the list
2. Then click on the [Fax](#)
3. Then click Ok



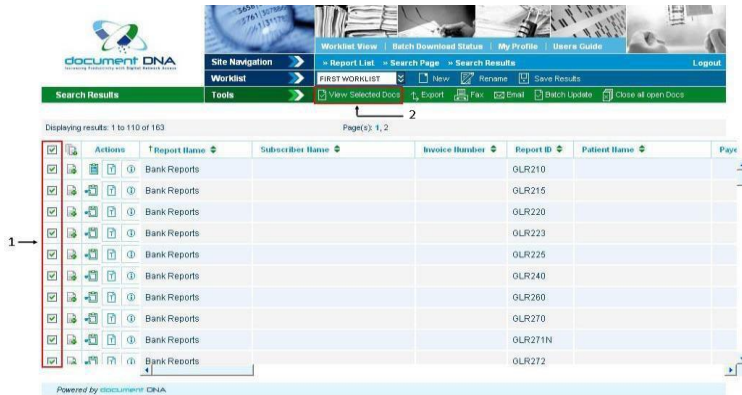
The screenshot shows the 'Address Book' interface. On the left, a list of contacts is displayed with 'ADAMS, ISOLDA' selected. On the right, a form for editing contact details is visible. The form includes fields for Last Name, First Name, Middle Name, Phone, Email, and Fax. There are also 'Ok' and 'Cancel' buttons. At the bottom, there are icons for 'New', 'Edit', 'Delete', 'Save', and 'Clear'. A note at the bottom of the form states: '* - The following special characters are supported: [, ' - _] *'. The footer of the page reads 'Powered by document DNA'.

8.5.1 Batch Download

Users can download a maximum of 500 pages at one time. If users would like to view a large number of images (more than 500 pages) they will be processed through a batch download request so the user can continue working in document DNA while waiting for the batch to process.

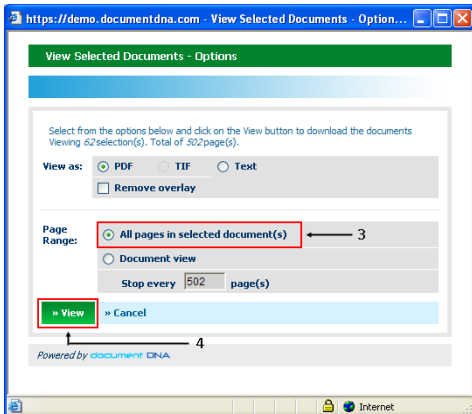
Step 1: Select documents (more than 500 pages)

Step 2: View Selected Docs



Step 3: In the **View Selected Documents - Option** pop up, click on the radio button for All Pages in Selected documents

Step 4: Click on the **View** button



Step 5: The Batch Download Notification window will display; enter a title in the **Enter request description** field.

Batch Download Notification

The maximum number of pages that can be downloaded interactively is limited to <500 pages.

Your request for 500 pages will be handled as a batch download request.

The request will be processed and is estimated to be available in the next 3 minutes and 8 seconds.

Enter a description in the space below to assist you in locating your request once it is completed.

Once the batch download is completed, you can view the document by clicking on the "Batch Download Status" link in the upper right hand corner of any document DNA screen. You will see the "request description" on that screen to help in identification.

You may view this document any number of times the next 30 days without delay by clicking the "Batch Download Status" link and selecting the document.

Enter request description:

» Continue
» Cancel

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Step 6: Users will receive a Batch Download Notification with a **request ID** at submission.

Batch Download Notification

Your request has been successfully submitted. Your request ID is "1961".

» Close

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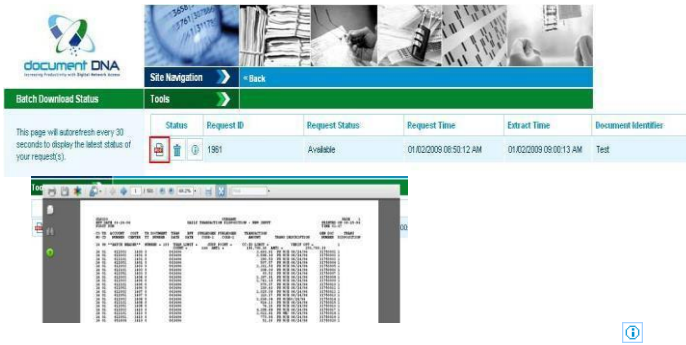
Step 7: The user must check on the status of the batch by clicking on the **Batch Download Status** link.

The screenshot shows the 'Report List' page with a navigation bar at the top. The navigation bar includes 'Site Navigation', 'Login', 'Report List', 'My Profile', 'User Guide', and 'Logout'. Below the navigation bar, there are several tool buttons: 'Continue', 'Select All', and 'Clear All'. The main content area is titled 'Report List' and contains a list of report types with checkboxes: 'Explanation of Benefits', 'Claims', 'Invoices', 'Proof of Delivery', 'Bank Reports', 'Patient Records', and 'EOP Vouchers'. The 'Batch Download Status' link is highlighted in the top right corner of the page.

Step 8: From the Batch Download Status screen, the Request Status will change from Pending to Available.



Step 9: Click on the PDF icon to open the documents in Adobe Viewer.



Note: If the user would like to view the details of the requested documents, they can click on the **topic information** icon to display the Request Details window as shown below.

Request Details

These documents are part of the request "1961".

Report Name	Report ID	Claim Number	Payee Number	Payee Name
Bank Reports	GR220			
Claims		27021418121600		
Claims		27021180420400		
Claims		26021433750800		
Claims		28021422101200		
Claims		26021423113800		
Claims		26021391969200		

9 Worklist

This feature is optional based on customer requirements, and may therefore not be available for all users.

A Worklist is used to store references to documents from the Search Results screen so that a user may return to the documents later without the need to search for them again.



Worklists are created from the Search Results screen, and managed from the Worklist View. Users can have up to 64 worklists and each worklist can have up to 500 documents.


All functionalities of Search Results are supported in Worklist

- Users can include all the documents in a worklist for batch operations such as View Selected Docs, Fax, Email, etc.
- Users can copy some or all documents from a worklist to a new or an existing worklist

























If a worklist has not been accessed for more than a year, then it will be purged automatically. Worklists are displayed in a drop-down list. Changing the worklist from the drop down will change the Worklist view for the current session.

Note: Worklist icons show the status of documents in the search results as they relate to a worklist.

-  Add this document in current worklist
-  Checkmark indicates that the document is available in the current worklist



Displaying results: 1 to 15

Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber
   	Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328300	9999999010
   	Explanation of Benefits	ERIC GOODMAN	OCEANSHORE PEDIATRIC LLC	27021428130800	9999999020
   	Explanation of Benefits	SHERWIN HALL	O P HENDRICKS MD	27021418121600	9999999030
   	Explanation of Benefits	SHANKA O GREENWICH	HAINES OB AND GYNPA	27021180420400	9999999040
   	Explanation of Benefits	SONNY W GODDARD	OAKWOOD PEDIATRIC GROUP PA	26021433750800	9999999050
   	Explanation of Benefits	EVERTON MORE	COMPLETE MEDICAL ASSOCIATION	28021422101200	9999999060

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Create a Worklist from the Search Results Screen:

Step 1: Click in the check boxes for the documents to add to the worklist.

Step 2: Click on the **New** link. The default title is 'Untitled 1'. If Untitled 1 has already been used, the number will be incremented to the next available number.


Step 3: Click on the **Rename** link and type in the text field to create a unique title for the newly created worklist.

Note: Clicking on the **Save Results** link, will save ALL the search results returned from the index key criteria search into the current worklist, NOT solely the checked items.

Add Documents to a Current Worklist

To add documents to a current Worklist, users must access from the Search Results Screen

Step 1: Click on **Add Document** into current Worklist link

Note: If the document is already present in the Worklist, it is indicated by  icon.

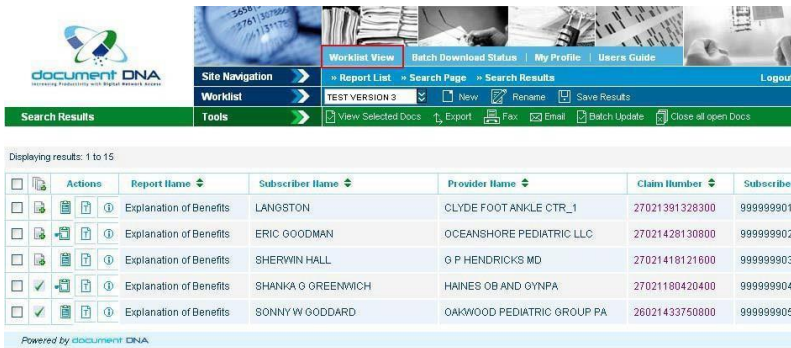


The screenshot shows the document DNA interface with a search results table. The table has columns for Report Name, Subscriber Name, Provider Name, Claim Number, and Subscriber. The first two rows have their checkboxes checked. A red box highlights the 'Add Document' icon in the Actions column of the second row. A red box also highlights the 'Add Document' icon in the Actions column of the third row. Labels on the left side of the screenshot point to these icons: 'Document available in current Worklist' points to the checked checkbox in the first row, and 'Add Document in current Worklist' points to the 'Add Document' icon in the second row.

Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber
Explanation of Benefits	LANGSTON	CLYDE FOOT ANKLE CTR_1	27021391328200	999999901
Explanation of Benefits	ERIC GOODMAN	OCEANSHORE PEDIATRIC LLC	27021428130800	999999903
Explanation of Benefits	SHERWIN HALL	O P HENDRICKS MD	27021418121600	999999903
Explanation of Benefits	SHARVA G GREENWICH	HANES OB AND GYNPA	27021180420400	999999904
Explanation of Benefits	SONNY W GOODARD	OAKWOOD PEDIATRIC GROUP PA	26021433750800	999999909
Explanation of Benefits	EVERTON MORE	COMPLETE MEDICAL ASSOCIATION	28021422101200	999999908
Explanation of Benefits	WILLIAM GOMEZ	NOPAIN FOOT ANKLE SURG P	26021423113800	999999901

Copy Documents:

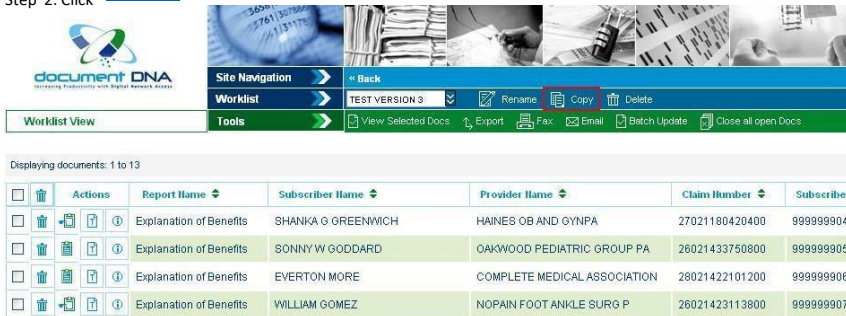
From any screen click on the Worklist View link



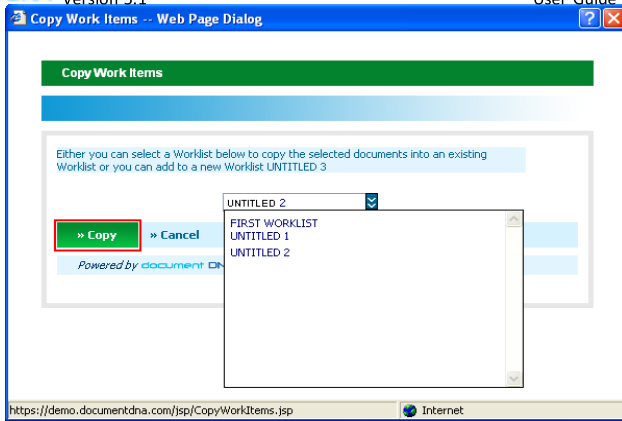
The contents of worklist can be copied to another using the Copy link.

Step 1: Click in the check boxes for the documents to be copied to the new worklist.

Step 2: Click Copy



Step 3: Choose from the existing worklists to move copies of the selected document into; or create a new worklist to copy the documents into a default titled worklist.




Note: Using the **Copy** option returns the user back to original worklist

Step 5: If creation of a new worklist with a default title was chosen, the user can rename the worklist by clicking on the Worklist drop down menu, and selecting the new worklist

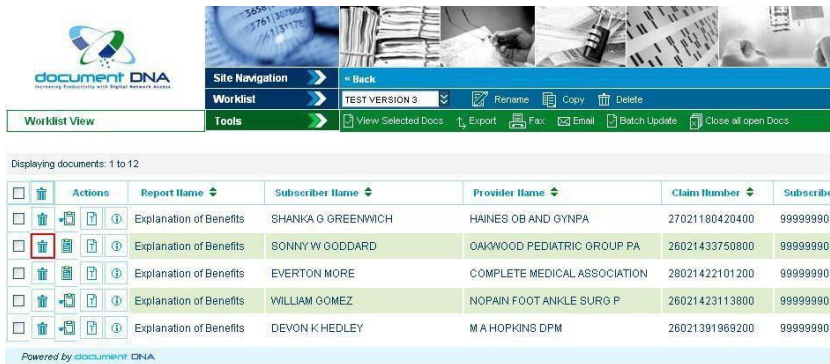
Step 6: Click on the **Rename** link and type in the text field to create a unique title for the newly created worklist.

Actions	Report Name	Subscriber Name	Provider Name	Claim Number	Subscriber
	Explanation of Benefits	SHANKA G GREENWICH	HAINES OB AND GYNPA	27021180420400	9999999040
	Explanation of Benefits	SONNY W GODDARD	OAKWOOD PEDIATRIC GROUP PA	26021433750800	9999999050
	Explanation of Benefits	EVERTON MORE	COMPLETE MEDICAL ASSOCIATION	28021422101200	9999999060
	Explanation of Benefits	WILLIAM GOMEZ	NOPAIN FOOT ANKLE SURG P	26021423113800	9999999070
	Explanation of Benefits	DEVON K HEDLEY	M A HOPKINS DPM	26021391969200	9999999080

Delete Documents

- Step 1: Click on the  Remove this Document icon
- Step 2: The user will be asked to confirm the delete

Note: This will not delete the physical document from the document DNA system.




Rename Worklists

Current worklists may be renamed from either the Search Results screen or the Worklist View.

- Step 1: Click on the  Rename link
- Step 2: Enter data in the text field to create a unique title for the worklist

Delete Worklist

- Step 1: Select the worklist from the Worklist drop down menu
- Step 2: Click on the  Delete link
- Step 3: The user will be asked to confirm the delete

Note: This will not delete the physical document from the document DNA system.

