DHS Oregon Department of Human Services

Aging and People with Disabilities

Information Memorandum Transmittal

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Topic: Other

Subject: EDMS Expansion: Implementation Information for AAA/APD

Applies to (*check all that apply*):

- ☐ All DHS employees
- ☒ Area Agencies on Aging
- ☒ Aging and People with Disabilities
- ☐ Self Sufficiency Programs
- ☐ County DD Program Managers
- ☐ ODDS Children's Residential Services
- ☐ Child Welfare Programs
- ☐ County Mental Health Directors
- ☐ Health Services
- ☐ Office of Developmental Disabilities Services(ODDS)
- ☐ ODDS Children's Intensive In Home Services
- ☐ Stabilization and Crisis Unit (SACU)
- ☐ Other *(please specify)*:

Message:

The Electronic Data Management System, known as EDMS, now includes three new query selections on the home screen. These are the three new areas in EDMS that will hold AAA/APD and SSP eligibility and case management documents.

The 3 new query selections are:

1) **Case Information** (accessible to all AAA/APD and SSP EDMS users)- searches within this section will retrieve general "Case Information" documents stored in EDMS, but will not retrieve documents that have been identified as "Secure" by either AAA/APD or SSP.

2) **AAA/APD Case Information Secured*** (accessible by specific roles in AAA/APD)- searches within this section will retrieve documents that have been identified by AAA/APD as "Secure" and documents stored in the general "Case Information" section.

3) **SSP Case Information Secured*** (accessible by specific SSP roles)- searches within this section will retrieve documents that have been identified by SSP as "Secure" and documents stored within the general "Case Information" section.

**More information about what is considered a "Secure" document will be provided at a later time.*

In late August, the Roseburg APD office began piloting the new process of scanning into and retrieving documents from these new query selections in EDMS. Over the next several months, the EDMS Expansion project will be rolling out the processes and software associated with these 3 new query selections to all APD and AAA branches.

Please note: This first release of EDMS ***will ONLY include customer eligibility and case management documents****. It* ***will NOT include*** *the electronic storage of provider documents (including HCW vouchers and HCW provider files), APS documents, OPI case records, licensing documents and any documents related to daily business of the local office.*

When will my office begin finding case documents in the new EDMS query selections?

When the Roseburg APD office began the pilot, they began scanning documents into the new queries in EDMS. As more districts are rolled out, more customer documents will be located in the new Case Information and AAA/APD Case Information Secured query selections.

When a case is transferred to your branch, the local office will use the current practice of notification via the case transfer mailboxes. Until all AAA/APD offices are rolled out, the case transfer email should include the location of the case file. For example, if an office that is scanning into EDMS transfers a case to an office that has not yet rolled out, the email should include information about where to find the case file, such as, "Case documents located in EDMS." If the transferring office has not rolled out, the email should indicate the case file will arrive via secure mail method.

Most AAA and APD field staff will be granted access, depending on role, to AAA/APD Case Information Secured and/or Case Information query selections in EDMS.

When will my office begin using these new sections of EDMS to store customer documents?

The EDMS Expansion project will be providing training regionally to districts that will then begin using the new software and business processes necessary to scan documents into the new areas of EDMS. A rollout schedule is currently being developed and will be announced soon. An introductory communication and conference call kick-off with identified staff from your district will begin the rollout.

What will be rolled-out to my branch as a result of the new areas of EDMS?

- **New EDMS Standardized Data Capture Process:** The new process to capture information for documents stored in the new Case Information sections of EDMS will include using the WEBM Find screen to capture much of the required information, including name, SSN, Prime, DOB, branch number and EBT or UCMS number. Additional search fields will include the most recent date of the document, the category of document, and whether the document is generally available or secure.
- **New Process for Organizing Scan Packets and Categorizing Documents into EDMS:** As documents are scanned into EDMS, they will be organized and labeled with appropriate categories. It will be like having a virtual 7-part hard file at your disposal!
- **New Image Editor Software:** New software will allow for the quality checking of scanned documents and for the capture of required search fields. There will be 14 ways to search for a document in these new sections of EDMS.
- **Deployment of Dedicated Scanners:** Each AAA and APD field office will receive a dedicated scanner.

How will this roll-out of EDMS affect my branch and daily work?

- **Electronic Case Files:** Once your office has the tools in place to scan into the new Case Information sections of EDMS, staff will begin storing customer eligibility and case management documents in the new areas of EDMS, rather than in paper files. As cases are newly created or re-determined for eligibility, the documents and paper file associated with that case will be scanned into EDMS for storage from that point forward.
- **Narration:** When scanning documents into EDMS, you are not required to narrate you scanned the document, just as you would not narrate when drop filing documents into a paper file today.
- **Case Transfers:** When you transfer a case that is stored in EDMS, you will transfer the case online and narrate accordingly, as you do today. An email to the receiving branch's case transfer mailbox will inform them the case file is in EDMS and no paper file will be mailed.

What resources will be available through the course of the roll-out?

- **Training:** In addition to regional trainings across the state, several training resources will be available:

  1) **Web Based Trainings (WBTs)** - Computer based training accessible through the Learning Center. The following Web Based Trainings will be posted for staff to take as needed:

     - *Preparing and Scanning Customer Documents*
     - *Data Capturing Using the WEBM Screen and Combining Documents*
     - *Sending Documents to EDMS*
     - *Case Information Document Searching in EDMS*

  2) **Quick Reference Guides (QRGs) -** Printable desk-side guides for reference as needed for specific processes.

  3) **Demonstration Video –** The video will show the entire process end-to-end and will be available on the Learning Center.

- **Website:** The EDMS Expansion website holds all project related communications and can be accessed here: **https://inside.dhsoha.state.or.us/dhs/businesstransition/edms-expansion.html**

- **FSAM:** The Field Staff Assistance Manual is being updated to include a section on EDMS. Other sections in the FSAM may be modified or deleted as our work changes to an electronic case file model.

- **Email:** The EDMS Expansion project can be reached at **EDMS.Expansion@state.or.us**

- **EDMS can be accessed** by using the Internet Explorer browser and entering **"docmanagement"** in the toolbar**.** User rights to EDMS are granted through the IUP process.

If you have any questions about this information, contact:

Contact(s):	EDMS Expansion Project: EDMS.Expansion@state.or.us APD Field Services: Caryn Whatley Caryn.WHATLEY@state.or.us		
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