# OnBase User Manual

**Kentucky MMIS Project**

**Cabinet for Health and Family Services**

**Department for Medicaid Services**

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**DELIVERABLE TITLE:** Onbase User Manual  
**DATE SUBMITTED:** October 30, 2009

## Table of Roles and Names

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
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</thead>
<tbody>
<tr>
<td>Author</td>
<td>Anita Batten</td>
</tr>
<tr>
<td>Reviewer</td>
<td>HP Enterprise Services Business Analysts</td>
</tr>
<tr>
<td>HP Enterprise Services Management</td>
<td>HP Enterprise Services Management Team</td>
</tr>
</tbody>
</table>
| Client                      | Commissioner Elizabeth Johnson  
|                             | Deputy Commissioner Carrie Banahan        |
|                             | Executive Director/CIO Lorna S. Jones     |
|                             | Chief Technical Officer Sandeep Kapoor    |
|                             | Claims Division Manager Rhonda Poston     |

**LOCATION and FILE NAME:** KY_MMIS_Onbase_User_Manual_V2.2_FINAL_(10-29-2009).Doc  
**AUTHORING TOOL:** MSWord2003
## Document Change Log

<table>
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<tr>
<th>Version</th>
<th>Changed Date</th>
<th>Changed By</th>
<th>Reason</th>
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<tr>
<td>1.0</td>
<td>09/08/2007</td>
<td>Amy Sanders</td>
<td>Creation of new document – 1st draft.</td>
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<tr>
<td>2.0</td>
<td>09/28/2007</td>
<td>Amy Sanders</td>
<td>Revisions made according to Commonwealth comments.</td>
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<tr>
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<td>12/18/2007</td>
<td>Ann Murray</td>
<td>Revised according to comment log</td>
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<tr>
<td>2.2</td>
<td>10/30/2009</td>
<td>Ron Chandler</td>
<td>Replace all instances of “EDS” with “HP Enterprise Services”, while NOT changing table names, email addresses, roles or role names.</td>
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</tbody>
</table>
# Table of Contents

1 Introduction ................................................................................................................................. 1
2 OnBase Overview .......................................................................................................................... 2
  2.1 Data Model .............................................................................................................................. 2
  2.2 External System Interfaces ...................................................................................................... 2
3 Accessing OnBase .......................................................................................................................... 3
4 Navigating in OnBase ..................................................................................................................... 5
5 Searching for and Viewing Images in OnBase ............................................................................. 6
  5.1 Searching for Images in OnBase ............................................................................................ 6
    5.1.1 Searching for a Claim ...................................................................................................... 6
    5.1.2 Searching for a Check .................................................................................................... 10
    5.1.3 Searching for a Prior Authorization Request ................................................................. 12
    5.1.4 Viewing and Manipulating Images in OnBase ............................................................... 18
6 Saving an Image to your PC .......................................................................................................... 19
7 Saving an Image to an Envelope .................................................................................................. 20
8 Printing an Image .......................................................................................................................... 22
9 Searching for and Viewing Reports in OnBase ............................................................................ 24
  9.1 Searching for reports in OnBase ............................................................................................. 24
  9.2 Selecting the report from search results ................................................................................ 28
  9.3 Viewing Reports in OnBase ..................................................................................................... 30
    9.3.1 Using the Text Search Option Within a Report ............................................................... 32
    9.3.2 Locking Columns and Rows .......................................................................................... 33
    9.3.3 Adding an Annotation .................................................................................................... 35
    9.3.4 Printing a Report ............................................................................................................ 37
    9.3.5 Navigating Multiple Report Pages ................................................................................ 38
    9.3.6 Navigating with Document Thumbnails ....................................................................... 41
    9.3.7 Adding Notes ................................................................................................................. 42
    9.3.8 Viewing Notes ................................................................................................................ 44
10 Other Types of Searches ............................................................................................................. 45
  10.1 Wildcard Searches ............................................................................................................... 45
  10.2 Using the Text Search Option to Locate Reports ................................................................... 47
  10.3 Searching Notes and Annotations ......................................................................................... 50
  10.4 Exporting to Microsoft Excel™ ........................................................................................... 52
  10.5 Adjusting the Excel™ file ..................................................................................................... 59
11 Saving and Printing a Report ...................................................................................................... 61
12 Exiting OnBase ............................................................................................................................ 65
13 APPENDIX ..................................................................................................................................... 66
  13.1 Document Type Contents ..................................................................................................... 66
1 Introduction

This user manual is designed to cover the information necessary to use the OnBase image and document retrieval system.

This manual covers the following areas:

- OnBase Overview,
- Accessing OnBase,
- Navigating and using OnBase,

The Table of Contents (TOC), in the PDF document, contains a user-friendly point and click capability. When the user moves the mouse over a section name in the TOC the pointer changes from a hand to a pointing finger. When the user clicks, while it is a pointing finger, it takes them to that section.
2 OnBase Overview

OnBase is enterprise content management software that combines integrated document management, business process management and records management in a single application. Whether deployed as a hosted or premises-based solution, OnBase allows organizations to automate business processes, reduce the time and cost of performing important business functions, improve organizational efficiency, and address the need for governance, risk and compliance through the management and control of content from virtually any source. OnBase also facilitates the sharing of digital content with employees, business partners, customers and other audiences.

Leveraging a single and secure content repository that can scale to manage billions of content objects, OnBase provides a modular suite of ECM applications including Production Document Imaging, Document Management, COLD/ERM, Business Process Management, and Records Management.

OnBase users can view and print documents via a web browser interface.

2.1 Data Model
The OnBase Application does not use any of the interChange database tables.

2.2 External System Interfaces
3 Accessing OnBase

STEP 1. Login to the MEUPS application.

The MEUPS Home Page will appear.

Users with OnBase access will see a link on their Applications menu (OnBase does not appear on the example above).
4 Navigating in OnBase

Scroll over the icons on the menu bar to see what the function of each is.

The four icons on the top toolbar are:

- **Image Retrieval**
- **Options** allows you to change your password
- **Help**
- **Exit**

Select DOCUMENT TYPE GROUP

Select DOCUMENT TYPE within the group

Set the DATE RANGE (these are not Dates of Service, but archival dates)

The bottom toolbar icons are:

- **Search**
- **Query History**
- **Clear Keywords**
- **Clear All**
5 Searching for and Viewing Images in OnBase

5.1 Searching for Images in OnBase

5.1.1 Searching for a Claim

“DOCUMENT TYPE GROUP” is a drop down menu.

**STEP 1.** Click on the arrow at the right.

**STEP 2.** Under “DOCUMENT TYPE GROUP” select “IMAGES- CLAIMS.”
STEP 3. Select the Document Type.

- Images-Claims are claims imaged at HP Enterprise Services during the “transition” period.
- Images-Claims-DDI KYMMIS are claims imaged after interChange go live.
- If you are searching for a claim with a Julian date earlier than 313 of 2005 (November 8), search in Images-Claims-Unisys. Claims with Julian dates 313 and after are in Images-Claims.
- Images-Claims-Unisys- TCN Only are claims that are not indexed by anything other than TCN.

Note that the = sign appears in the example at the left of each field. This indicates that you are searching for a value that “equals” your search criteria. You may click the “equal” sign to select a “greater than” or “less than” sign instead.

STEP 4. Enter the search criteria and click the binoculars.

Search results are displayed in rows. Your screen should look like this?
**STEP 5.** Select the claim you wish to view by double-clicking the row.

Your screen should show this:
NOTE: Searches by TCN or ICN will return only one document, which will automatically be displayed in the document window.

STEP 6. Click on the blue “clear all” arrow to clear all the search fields, return to the main menu and begin a search for another document, or click the gold key with the blue arrow (clear keywords icon) to search for another claim image in the same Document Type.
5.1.2 Searching for a Check

**STEP 1.** Select the DOCUMENT TYPE GROUP “Images- Checks.”

**STEP 2.** Select the DOCUMENT TYPE “Images - Checks – HP Enterprise Services.”

- Checks-Unisys are checks imaged at Unisys.
- Images-Checks-HP Enterprise Services are checks imaged at HP Enterprise Services. If you are searching for a check with a Julian date earlier than 313 of 2005 (November 8), search in Images-Checks-Unisys. Claims with Julian dates 313 and after
are in Checks-HP Enterprise Services.

**STEP 3.** Enter the Cash Control Number in the CCN field.

**STEP 4.** Click the binoculars.

You should see this:
5.1.3 Searching for a Prior Authorization Request
STEP 1. Select the DOCUMENT TYPE GROUP “Images – PA.”

STEP 2. Select the applicable DOCUMENT TYPE:

- Prior Authorization - HP Enterprise Services are PA requests imaged at HP Enterprise Services.
- Prior Authorization-SHPS are PA requests imaged at SHPS.
- Prior Authorization-Unisys no PA are PA requests imaged at Unisys, but not indexed by PA Number.
- Prior Authorization – Unisys are PA requests imaged at Unisys.
STEP 3. Enter additional search criteria.

The search criteria options will differ, depending on your selection of HP Enterprise Services, SHPS or Unisys-imaged PA's.

STEP 4. Click the binoculars.

You may get a warning about the size of the query.

STEP 5. Click “OK.”

Your results should look like this:
STEP 6. Select the first image and double-click to open it in the Document Window. You will see this:
STEP 7. Click the FIT WINDOW icon to view the entire image.
5.1.4 Viewing and Manipulating Images in OnBase
Two tool bars appear above the image. They allow you to manipulate the document and perform annotation functions.

<table>
<thead>
<tr>
<th>TOOL BARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scroll over the tool bar icons to see the pop-up labels.</td>
</tr>
<tr>
<td>TOOL BAR 1</td>
</tr>
<tr>
<td>TOGGLE ANNOTATION</td>
</tr>
<tr>
<td>TOOL BAR 2</td>
</tr>
<tr>
<td>PRINT, OPTIONS</td>
</tr>
<tr>
<td>PAGE FORWARD, BACK, END, BEGINNING</td>
</tr>
<tr>
<td>ZOOM IN, OUT</td>
</tr>
<tr>
<td>ZOOM BY %</td>
</tr>
<tr>
<td>ACTUAL SIZE, FIT WINDOW, FIT WIDTH</td>
</tr>
<tr>
<td>ROTATE PAGE</td>
</tr>
</tbody>
</table>
6 Saving an Image to your PC

**STEP 1.** Right-click anywhere on the document in the document window. Select “Send to” and “File.”

**STEP 2.** Select “image/tiff” and click OK.

**STEP 3.** Select a location and name your file. Click “Save.”
7 Saving an Image to an Envelope

STEP 1. Right-click anywhere on the document in the document window. Select “Send to” and “Envelope.”

STEP 2. Click “New” in the Select Envelope Box.

STEP 3. Enter the name of your envelope and click OK.

STEP 4. The “Select Envelope” box should now show your new envelope name. Click “Add.”

You should see the message displayed to the left.

STEP 5. Click OK.

STEP 6. Click the blue clear All arrow to return to the main menu.

STEP 7. Click the “Envelopes” icon.
Your Envelope will be displayed.

**STEP 8.** Click to open it.

**NOTE:** Your envelope will only be visible to you, on any PC where you log in to OnBase. It will remain until you delete it.

You’ll see this:
8 Printing an Image

STEP 1. Click the Printer Icon
The Print Dialog box will appear.

**STEP 2.** Click the “Preferences” button.

The Printing Preferences box will appear.

**STEP 3.** Click the “Layout/Watermark” tab.

**STEP 4.** Make sure “Portrait” is selected from the “Image Orientation” drop down menu. Click “OK.”

The Printing Preferences box will close.

**STEP 5.** Click “Print” on the Print Dialog box.

NOTE: The print setup instructions may vary based on the printer used. Be sure to set images to portrait and reports to landscape for optimum printing.
9 Searching for and Viewing Reports in OnBase

9.1 Searching for reports in OnBase

“DOCUMENT TYPE GROUP” is a drop down menu.

STEP 1. Click on the arrow at the right.

STEP 2. Under “DOCUMENT TYPE GROUP” select the type of report you wish to view.

NOTE: Reports are grouped as Mainframe Reports or iCE reports. Reports generated in the legacy MMIS will appear in “Mainframe” report groups. Reports generated in interchange will appear in “ICE” report groups.
STEP 3. After selecting a “DOCUMENT TYPE GROUP,” select the “DOCUMENT TYPE” select the report you wish to view.

If you wish to limit your search to certain dates, you may do so by setting date parameters. Remember these are document dates, not dates of service or payment dates, etc.

STEP 4. Click on the calendar to the right of the “FROM” field.
The “FROM” and “TO” fields should look like this when you have entered date selections.

The search options on the “Keywords” tab may differ, depending on the Document Type selected. For example, when “ICE REPORTS-EPSDT” is the selected Document Type, the search fields are “Report Number” and “Report Name.”

**STEP 5.** You may enter information in either or both fields. Note that the = sign appears in the example at the left. This indicates that you are searching for a value that “equals” your search criteria. NOTE: You won’t need to use these fields for most reports if you made a selection in “DOCUMENT TYPE.”

**Report Number or Report Name must match exactly to return results.**
EXAMPLE - Remittance Advice

When “ICE-Remittance Advice” is the selected Document Type, the search fields are “RA Number” and “Provider ID.”

You may enter information in either or both fields. Note that the = sign appears in the example at the left. This indicates that you are searching for a value that “equals” your search criteria.

NOTE: You must enter information in at least one of the keyword fields to locate a Remittance Advice.

STEP 6. If you selected a “DOCUMENT TYPE GROUP,” but did not make a selection in “DOCUMENT TYPE,” You may add additional values to search criteria by clicking on the field label (note the label “Report Number” is highlighted in the example at the left.)
9.2 Selecting the report from search results

After your search is executed, you will see a screen that looks like this:

An additional field will appear, allowing you to enter another value. For example, if you were searching for remittance advice statements, you could search for two providers’ remittance advice statements in the same search.

STEP 7. After the search criteria have been entered, click the Binoculars on the left side of the bottom toolbar.
STEP 8. Select the desired report by double-clicking on the row in the results window.

The report will be displayed like this:
9.3 Viewing Reports in OnBase

Four tool bars appear above the report. They allow you to manipulate the document, and perform search and annotation functions.

<table>
<thead>
<tr>
<th>TOOL BARS</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Tool Bar 1" /></td>
</tr>
<tr>
<td><img src="image2.png" alt="Tool Bar 2" /></td>
</tr>
<tr>
<td><img src="image3.png" alt="Text Search Options" /></td>
</tr>
<tr>
<td><img src="image4.png" alt="Screen Capture" /></td>
</tr>
<tr>
<td><img src="image5.png" alt="Screen Capture" /></td>
</tr>
<tr>
<td><img src="image6.png" alt="Screen Capture" /></td>
</tr>
</tbody>
</table>
9.3.1 Using the Text Search Option Within a Report

STEP 1. Click the TEXT SEARCH OPTIONS icon on the top tool bar.

STEP 2. When the TEXT SEARCH OPTIONS box pops up, select “Start on Current Page” and click apply.

STEP 3. Enter search criteria in the search field. For best results, use ALL CAPS. “REMITTANCE” is shown in the example.

The second icon, “FIND NEXT” will become active.

STEP 4. Click the FIND NEXT icon.

The first occurrence of the search criteria will be highlighted.
STEP 5. Click “FIND NEXT” again. The “FIND PREVIOUS” icon will become active, and the second occurrence of the search word will be highlighted. Clicking “FIND PREVIOUS” will return you to the previous occurrence.

9.3.2 Locking Columns and Rows

If the document you are viewing is formatted as a text report, you can lock columns or rows of text into position to create easy reference points when you scroll through a page.

- Locking text columns locks the specified number of character positions at the far left of the page.
- Locking text rows locks the specified number of lines at the top of the page.

When you lock rows or columns, the system inverts the colors in the locked area to make reference even easier. If the Pages toolbar is open, the colors in the locked areas of the thumbnails are also inverted.

Locks apply to the complete current document and only the current document and they apply only as long as it remains the current document. If you leave the document and return, all the text will be unlocked.

The “LOCKS COLUMNS” and “LOCK ROWS” icons are on the second toolbar.

The first icon is the “LOCK COLUMNS” icon. Enter a number in the box to the right of the “LOCK COLUMNS” icon.

STEP 1. Click the “LOCK COLUMNS” icon.
Your screen should look like this; the locked columns are black.

**STEP 2.** Click the “LOCK COLUMNS” icon again to unlock.

**STEP 3.** Delete the entry in the box next to the “LOCK COLUMNS” icon and enter a number in the box to the right of the “LOCK ROWS” icon.

**STEP 4.** Click the “LOCK ROWS” icon.

Your screen should look like this; the locked rows are black.
STEP 5. Click the “LOCK ROWS” icon again to unlock.

9.3.3 Adding an Annotation

STEP 1. Click the arrow for the Annotation drop-down menu and select the Annotation Type.

*The only choice at this time is “MedRec-Approved Signature”

STEP 2. Click on the TOGGLE ANNOTATION icon.

STEP 3. When you put your mouse in the document window, click and hold it. Crosshairs will appear.
STEP 4. Left-click the mouse button and hold. Drag the mouse to create a box around the desired area of the report.

When you let go, a pink-shaded box will appear over the area marked.

STEP 5. Click the TOGGLE ANNOTATION icon again when you have placed your annotation.

You must now open the note attached to the annotation to add your text.

STEP 6. Right-click anywhere on the document. Select “Notes” and “View Notes.”

STEP 7. Select the Annotation you wish to view and click “OK.” Each annotation has a date, to help you identify it.
STEP 8. Click in the white area of the note and add text. Note the User’s ID appears on the note.

STEP 9. To delete the annotation, right-click in the header portion of the note and select “Delete Note.”

NOTE: An annotation is visible to any user, and may be deleted by other users. It will remain until deleted.

9.3.4 Printing a Report

STEP 1. Click the Print icon on the toolbar.

A Print dialog box appears.

STEP 2. Click “Preferences.”
STEP 3. Select the Layout tab and click “Landscape” under Orientation.

STEP 4. Click OK.

STEP 5. Click “Print.”

NOTE: The print setup instructions may vary based on the printer used. Be sure to set Images to portrait and reports to landscape for optimum printing.

9.3.5 Navigating Multiple Report Pages

Click the right-pointing triangle to page forward one page.

Click the right-pointing double arrows to go to the last page of the report.

Click the left-pointing triangle to page back one page.
Click the left-pointing double arrows to go to the first page of the report.

Click the plus sign to zoom in, or magnify the report page.

Click the minus sign to zoom out, or reduce the report page.

Use the drop-down menu or enter a percentage amount to set the magnification amount numerically.

Click the equal sign button to display the report page in “actual size.”

Click the button with two arrows to fit the report to the width of the document window.

Click the button with four arrows to fit the report page to the size of the document window.

Click the left arrow to rotate the page to the left 90 degrees.
Click the right arrow to rotate the page to the right 90 degrees.

Click the “cog” button to set display options.

The Viewer Options box will open.

Setting changes will apply any time you are logged into OnBase.
9.3.6 Navigating with Document Thumbnails

Look at the document thumbnails on the right side. Note that on Page 129, the upper left side of the thumbnail is black. That indicates the portion of the page you are viewing in the document window.

Use the light blue scroll bars to move to the left and down.

Note that the black box on the thumbnail moves as you scroll.

You may also place your cursor on the black box, left-click and drag. Note the page display changes as you move the black box.
9.3.7 Adding Notes

STEP 1. Right-click anywhere on the document within the document window.

STEP 2. Select “Notes” and “Add Note.”

STEP 3. An “Add Note” dialog box will appear.
STEP 4. Highlight the NOTE TYPE and click “OK.”

**“General Note” is the only type currently in use.**

A “sticky note” box will appear.

STEP 5. Enter the content of your note.

STEP 6. Click one time anywhere on the yellow bar to close the note window.

STEP 7. Another click will re-open it.
9.3.8 Viewing Notes

STEP 1. To view Notes, right-click anywhere on the document window. Select “Notes” and “View Notes.”

A menu pops up.

STEP 2. Select the Note you wish to view and click “OK.”

STEP 8. Right-clicking on the top bar of the Note will allow you to delete it.
10 Other Types of Searches

10.1 Wildcard Searches

A Wildcard search allows you to search for wildcards in a report name (within a Single Document type Group). For instance, you could search for all the Provider reports with “ENROLL” in the report name. This would return all enrollment-related reports.

**STEP 1.** Select the desired “DOCUMENT TYPE GROUP.”

**STEP 2.** Highlight the first report under “DOCUMENT TYPE.”

**STEP 3.** Hold down the “Shift” key, scroll down and highlight the last report under “DOCUMENT TYPE.”

**STEP 4.** Using the calendars on the “FROM” and “TO” fields, select the desired date span.

**STEP 5.** Enter your search string in the “REPORT NAME” field.

Be sure to put an asterisk (*) before and after your search string.
STEP 6. Click the binoculars at the bottom left side of the left-hand navigation.

Your screen should look like this:
10.2 Using the Text Search Option to Locate Reports

A Text search allows you to search for a report based on text which appears within the report. For example, you might want to search for all reports where a particular provider appears, so you could search using the provider’s name or number as search criteria.

**STEP 1.** Select the desired “DOCUMENT TYPE GROUP.”

**STEP 2.** Highlight the first report under “DOCUMENT TYPE.”

**STEP 3.** Hold down the “Shift” key, scroll down and highlight the last report under “DOCUMENT TYPE.”

**STEP 4.** Using the calendars on the “FROM” and “TO” fields, select the desired date span.

**STEP 5.** Click on the “TEXT” tab on the left-hand navigation.
STEP 6. Enter your criteria in the “Search String” field.

STEP 7. Click the binoculars.

Search results will be displayed at the top. Your screen should look like this:

The search results will show you:

1. Number of hits
2. Page in the report on which they appear
3. Report number and name
**STEP 8.** Left-click on a hyperlinked page number to open the report and view the information.

The information will be highlighted.
10.3 Searching Notes and Annotations

STEP 1. Select the DOCUMENT TYPE GROUP.

STEP 2. Select the DOCUMENT TYPE.

STEP 3. Click the “Note” tab.

STEP 4. Select the NOTE TYPE you are searching for.
STEP 5. Enter the SEARCH STRING and click the binoculars.

Search results will be displayed. If only one document is returned, it will be open in the document window along with the note.
10.4 Exporting to Microsoft Excel™

STEP 1. Under “DOCUMENT TYPE GROUP,” select “REPORTS-PROVIDER.”

STEP 2. Select the desired report from “DOCUMENT TYPE” menu.
STEP 3. Click on the binoculars at the bottom left side of the left-hand navigation.  

Your screen should look like this:

![Binoculars screen](image)

STEP 4. Select the desired report and double-click on it.
STEP 5. RIGHT-click anywhere on the document window (must be in the window, not on a toolbar).
STEP 6. Highlight “Send To” and click on “File.”

This box will pop up:

Make sure “text/plain” is selected under “Content Type.”

STEP 7. Click the “Advanced…” button.

STEP 8. In the “Advanced Options” box, click “Convert.” Enter “2” in the spaces field. NOTE: You may try different numbers here, depending on the report type. Two or four spaces usually works best.

STEP 9. Click “OK.”
STEP 10. Click “OK” in the “Save to File” box.

STEP 11. Choose the folder to save the document, and name the document or use the default name.

STEP 12. Click “Save.”

STEP 13. Launch Microsoft Excel™

You should see a window like this:
STEP 14. Go to “File, Open”

STEP 15. When your file menu appears, select “All Files (*. *)” in the “Files of type.” box.

STEP 16. Locate the text file you saved from OnBase and highlight it.

STEP 17. Click “Open.”
When the Microsoft Excel Text Import Wizard pops up, make sure “Delimited” is selected under “Original Data Type.”

**STEP 18.** Click “Next.”

Make sure “Tab” is selected under “Delimiters”

**STEP 19.** Click “Next.”

**STEP 20.** Click “Finish.”
You should see this screen:

![Excel Screen]

### 10.5 Adjusting the Excel™ file

Where you see “#####,” Excel is telling you the column isn’t wide enough to display the entry, the columns need to be wider.

To widen the column:

1. Highlight the column.
2. Click on “Format”.
3. Select “Column” and “AutoFit Selection”.

Now you should see this screen:

You may adjust the headings to match the original report.
11 Saving and Printing a Report

**STEP 1.** Using the mouse, left-click on the document window.

A menu appears.

**STEP 2.** Select “Send to- File.”

A dialog box appears.

**STEP 3.** Select “application/pdf.”

**STEP 4.** Click “OK.”

Another dialog box appears.
STEP 5. Select the desired location to save the file.

STEP 6. Click “Save.”

STEP 7. Locate the saved PDF file and double click to open it. (You must have Acrobat Reader installed).

The report will be displayed.

STEP 8. Select “Print” from the “File” menu.
STEP 9. Click the “Properties” button.

STEP 10. Click the “Layout/Watermark” tab.

STEP 11. Select “Landscape” under “Image Orientation.”
STEP 12. Click “OK.”

The document properties dialog box will close and the print dialog box will reappear.

STEP 13. Click “OK.”

NOTE: The print setup instructions may vary based on the printer used. Be sure to set Images to portrait and reports to landscape for optimum printing.
12 Exiting OnBase

When you are finished using OnBase, click the EXIT icon to log off.
## 13 APPENDIX

### 13.1 Document Type Contents

<table>
<thead>
<tr>
<th>Document Type Group</th>
<th>Document Type</th>
<th>Contents</th>
<th>Search Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>iCE Faxes-Electronic FAX Data</td>
<td>UM-28- Provider Enrollment Utilization Management Fax</td>
<td>Faxes received by the UM department</td>
<td>Provider ID PA Number Case Number CTN</td>
</tr>
<tr>
<td>iCE Letters</td>
<td>Please refer to iCE subsystem User Manuals for complete listing of letters</td>
<td>Letters generated in interChange</td>
<td>Criteria depends on letter type selected</td>
</tr>
<tr>
<td>iCE Reports</td>
<td>Please refer to iCE subsystem User Manuals for complete listing of reports</td>
<td>Reports generated in interChange</td>
<td>Criteria depends on report type selected</td>
</tr>
<tr>
<td>Images-AR/Financial</td>
<td>Images- ARFin- HP Enterprise Services</td>
<td>A/R documents scanned at HP Enterprise Services</td>
<td>AR TCN Provider ID Letter Date Generation</td>
</tr>
<tr>
<td>Images- Adjustments</td>
<td>Images Adjustments</td>
<td>Adjustments scanned at HP Enterprise Services</td>
<td>TCN</td>
</tr>
<tr>
<td>Images- Adjustments</td>
<td>Images Adjustments-New KYMMIS</td>
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