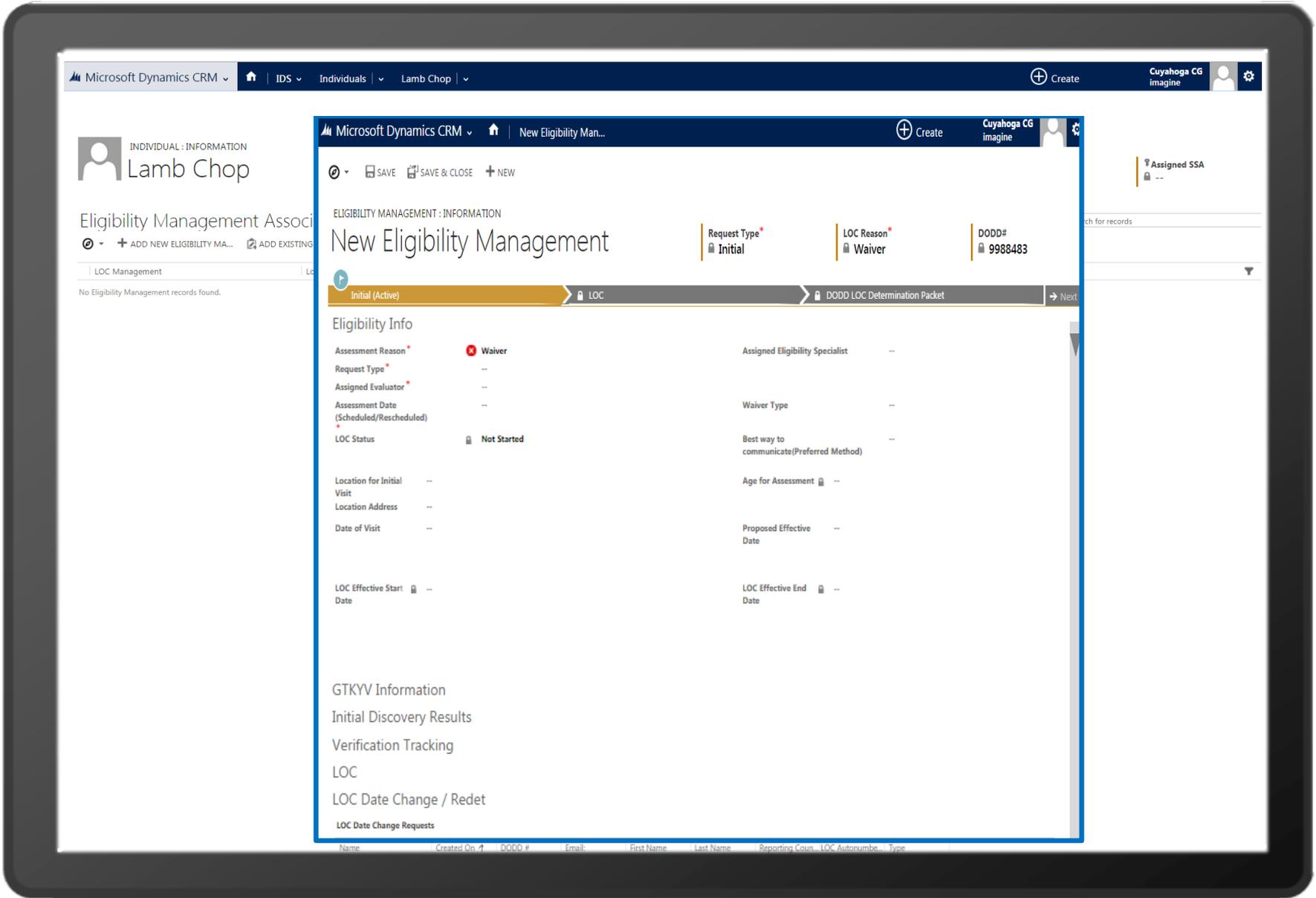


Uploading Documents into the LOC Application

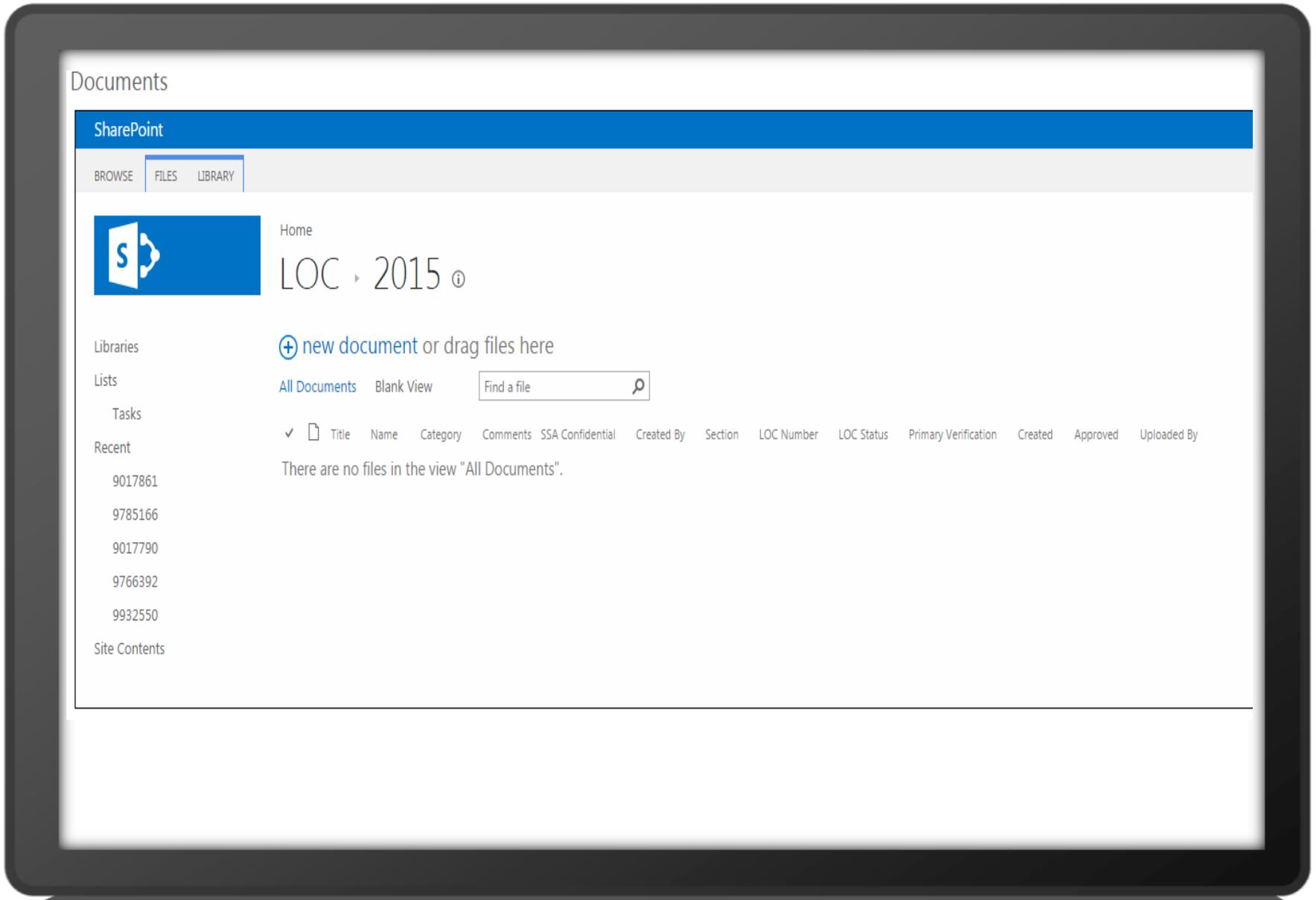


Still in the **Initial** phase, marked by the flag icon , scroll down to the **Documents** tab.

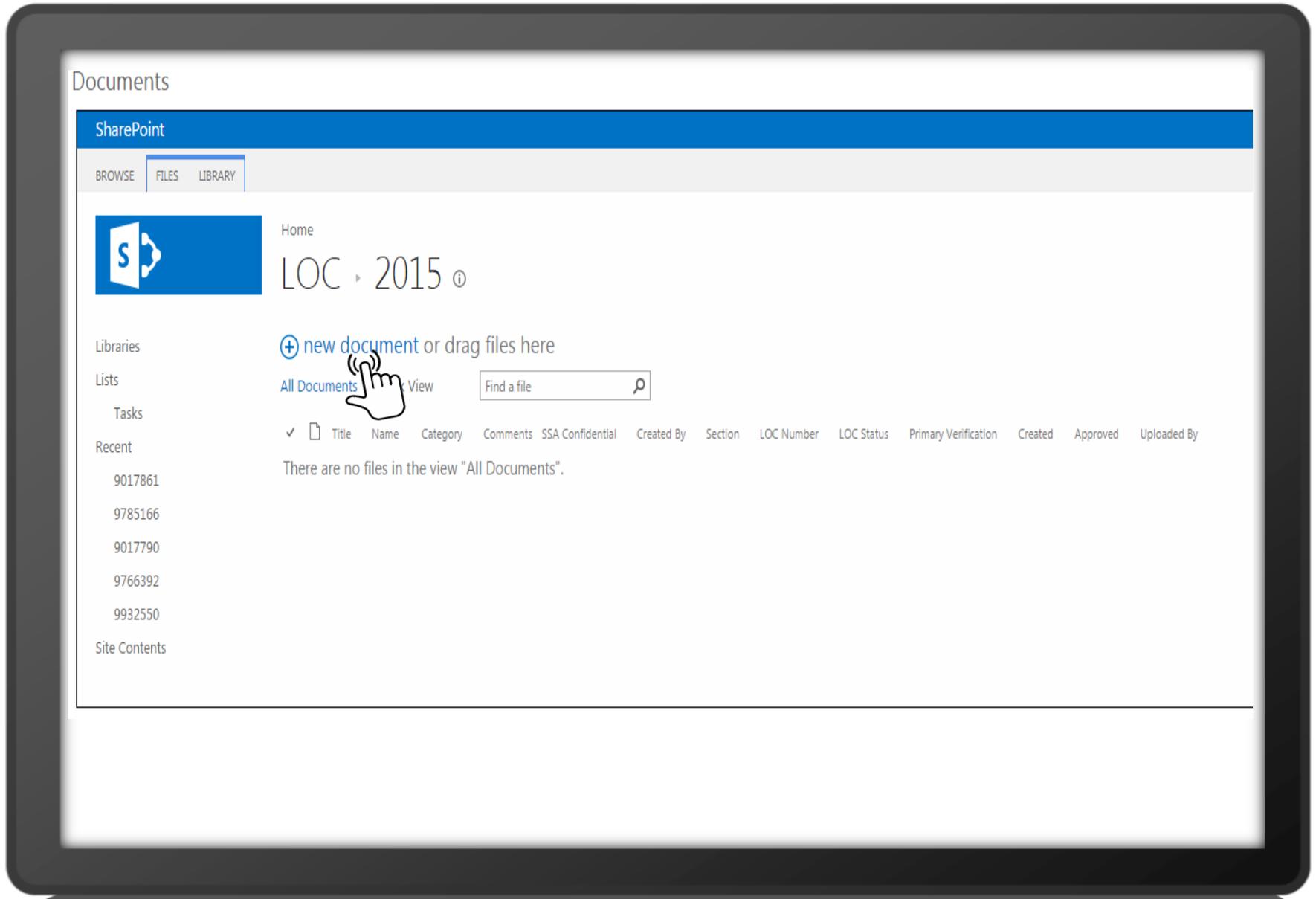


The screenshot displays the Microsoft Dynamics CRM interface for Eligibility Management. The main header shows "Microsoft Dynamics CRM" and "Individuals | Lamb Chop". The left sidebar identifies the user as "Lamb Chop" and the page as "Eligibility Management Association". The main content area is titled "New Eligibility Management" and shows a progress bar with "Initial (Active)" selected. Key fields include "Request Type" (Initial), "LOC Reason" (Waiver), and "DODD#" (9988483). The "Eligibility Info" section lists fields such as "Assessment Reason" (Waiver), "Request Type", "Assigned Evaluator", "Assessment Date", "LOC Status" (Not Started), "Assigned Eligibility Specialist", "Waiver Type", "Best way to communicate", "Age for Assessment", "Proposed Effective Date", and "LOC Effective Start/End Date". A "Documents" tab is visible at the bottom of the page.

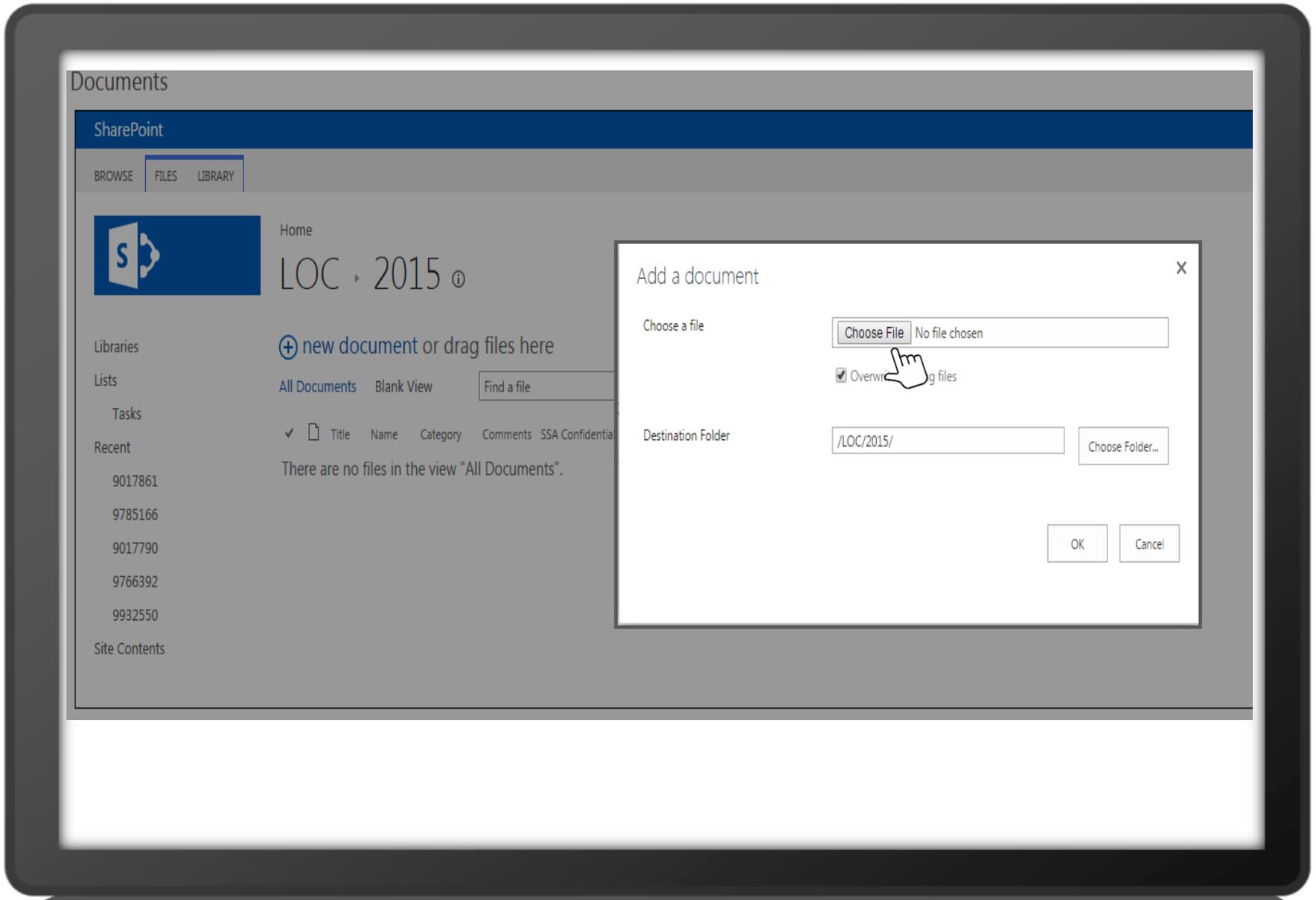
When you click on the **Documents** tab, the section expands. From this screen you can upload supporting documents.



Click  new document.



Then click **Choose File**. Select the document you wish to upload from your computer and click **OK**.



A new screen will pop-up. From here you can add a **Title** to the document and add **Comments**.

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Blank View

Find a file

✓ Title Name Category Comments SSA Confidential

There are no files in the view "All Documents".

9988483 - Clinician verification form,birth to nine,2015.pdf...

EDIT



Check In



Cancel



Paste



Cut



Copy



Delete Item

Commit

Clipboard

Actions



The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

Name *

Clinician verification form.birth to nine.2 .pdf

Title

Comments

Scroll down. For **Section**, always choose **LOC**.
Then choose the **Category** that this document supports.

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Check In

Cancel

Paste

Cut

Copy

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Commit

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Actions

A summary of this resource

Section * LOC

Category * Choose Section: ▾

LOC Number

Approved Date

LOC Number

LOC Status

Primary Verification

Click **Primary Verification** if the document is the Primary Verification for this LOC. Then click **Save**.

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✓ Title Name Category Comments SSA Confidential

There are no files in the view "All Documents".

9988483 - Clinician verification form,birth to nine,2015.pdf...

EDIT

Check In Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

Category * Choose Section: ▾

Section * ▾

Approved By

Approved Date

LOC Number

LOC Status

Primary Verification

You will see your document listed on the screen.

SAVE SAVE & CLOSE + NEW

Eligibility Management -- (Lamb Chop) (6/22/201...

Request Type
Initial

LOC Reason
Waiver

DODD#
9988483

Initial (Active) LOC DODD LOC Determination Packet Next Stage

Eligibility Info No ✓ Primary Verification Yes
GTKYV Scheduled No
GTKYV Information No

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✓	📄	Title	Name	Category	Comments	SSA Confidential	Created By	Section	LOC Number	LOC Status	Primary Verification	Created	Appr
		Clinician verification form.birth to nine.2015	*	...			cg					About an hour ago	Yes

Once you have uploaded the **Primary Verification**, mark **Yes** at the top of the screen. This serves as a reminder when completing the **Initial** stage.

SAVE SAVE & CLOSE + NEW

Eligibility Management -- (Lamb Chop) (6/22/201...

Request Type
Initial

LOC Reason
Waiver

DODD#
9988483

Initial (Active) LOC DODD LOC Determination Packet Next Stage

Eligibility Info No
GTKYV Scheduled No
GTKYV Information No

Primary Verification Yes



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✓	📄	Title	Name	Category	Comments	SSA Confidential	Created By	Section	LOC Number	LOC Status	Primary Verification	Created	Appr
		Clinician verification form.birth to nine.2015	*				cgc					About an hour ago	Yes

Once all required information has been entered, click **Save** for the **Next Stage** button to become active.

The screenshot displays a web application interface for 'Eligibility Maintenance'. At the top, there are navigation buttons: 'SAVE', 'SAVE & CLOSE', and '+ NEW'. The main title is 'Eligibility Maintenance -- (Lamb Chop) (6/22/201...'. On the right, there are three fields: 'Request Type' with a dropdown set to 'Initial', 'LOC Reason' with a dropdown set to 'Waiver', and 'DODD#' with the value '9988483'. Below this is a progress bar with two stages: 'Initial (Active)' and 'DODD LOC Determination Packet'. A 'Next Stage' button is highlighted in a green box. Below the progress bar is a table with the following data:

Eligibility Info	No	✓ Primary Verification	Yes
GTKYV Scheduled	No		
GTKYV Information	No		

Below the table is a 'Documents' section with a 'SharePoint' header. It shows a file library named 'LOC - 2015'. The library contains a list of documents with the following columns: Title, Name, Category, Comments, SSA Confidential, Created By, Section, LOC Number, LOC Status, Primary Verification, Created, and Appr. The first document in the list is 'Clinician verification form.birth to nine.2015' with a PDF icon, created by 'cgc' about an hour ago.

Click **Next Stage** to continue. From this dropdown, click **Create+** to create a new LOC.

ELIGIBILITY MANAGEMENT : INFORMATION

Eligibility Management -- (Lamb Chop) (6/22/201...

Request Type*
Init

LOC Reason*
Init

DODD#

Initial (Active) → LOC → DODD LOC Determ

Eligibility Info	No	✓ Primary Verification	Yes
GTKYV Scheduled	No		
GTKYV Information	No		

→ Next Stage

Select LOC

No records found.

0 Available **Create +**

Documents

SharePoint

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+ new document or drag files here

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All Documents

Blank View

Find a file

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✓	📄	Title	Name	Category	Comments	SSA Confidential	Created By	Section	LOC Number	LOC Status	Primary Verification	Created	Appr
	📄		Clinician verification form.birth to nine.2015 ✖									About an hour ago	Yes

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