

FA Customer Service Manual

(ImageNow Full-Client Only)

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Table of Contents

Introduction 3

Printing Documents 4

Capture Profiles 4

Accepting Certain Documents 4

FA Print to WF 5

Processing Documents in FACS Processing Workflow Queues 8

Processing Documents in FACS Review Workflow Queues 12

Drag and Drop Feature 15

Drop as a New Page 15

Drop as a New Document 16

# Introduction

This document will assist you with routing, linking, and processing a document in the customer service processing section of the FA Financial Aid workflow process. There are fourteen (14) workflow queues divided into two (2) sections:

1. **FACS Processing**

This workflow queue will include all customer service documents imported into ImageNow via scan, email, and fax. These documents are awaiting processing.

* 1. **FACS Processing A – B**
  2. **FACS Processing C – Fo**
  3. **FACS Processing Fp – Ji**
  4. **FACS Processing Jj – Mn**
  5. **FACS Processing Mo – Rh**
  6. **FACS Processing Ri – S**
  7. **FACS Processing T – Z**

1. **FACS Review**

This workflow queue is where processed documents are routed and ready for review.

* 1. **FACS Review A – B**
  2. **FACS Review C – Fo**
  3. **FACS Review Fp – Ji**
  4. **FACS Review Jj – Mn**
  5. **FACS Review Mo – Rh**
  6. **FACS Review Ri – S**
  7. **FACS Review T – Z**

This following workflow queues will be accessible from the FACS Processing workflow to route documents to:

1. **FACS Route**

This workflow queue will route documents to/from the processing and review workflow queues.

1. **FA Ready to Archive**

This workflow queue will route all documents processed to ARCHIVE.

1. **FACS Delete Pending**

This workflow queue will include documents that need to be deleted from the system; only Supervisors will have access to process and delete documents in this workflow queue.

1. **FACS Re-Route**

This workflow queue will route documents where the document type has been changed to the appropriate workflow queue.

In addition to processing and routing documents, you can import documents into ImageNow via printing using the **DRAG and DROP** feature. (**\*Note**: There is a virtual printer called ImageNow Printer that can be selected when printing a document.)

# Printing Documents

## Capture Profiles

There is one (1) capture profile for printing:

1. FA Print to WF

This capture printing profile is used when printing a document and requires the user to be logged into BANNER for a particular student 800#.

## Accepting Certain Documents

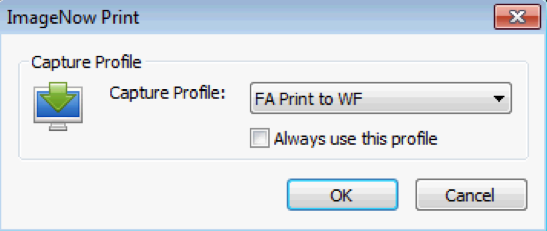
When receiving any of the following document types for students, go to BANNER's RRAAREQ form and mark the student’s record with the specific codes listed below, relative to the document received:

1. Amended Taxes AMTAX
2. Birth Certificate BCERT
3. Consortium Agreement  CONSAG
4. Driver’s License   DRIVE
5. Marriage Certificate  MCERT
6. Medical Records – Parent      MEDICP
7. Medical Records – Student   MEDICS
8. NC Reach Application NREACH
9. OSFA Scholarship Application  OSFA
10. Parent Statement STATMP
11. Receipts RECEIP
12. Student Statement STATMT
13. Verification of Utilization of UCAE Services  UCAE

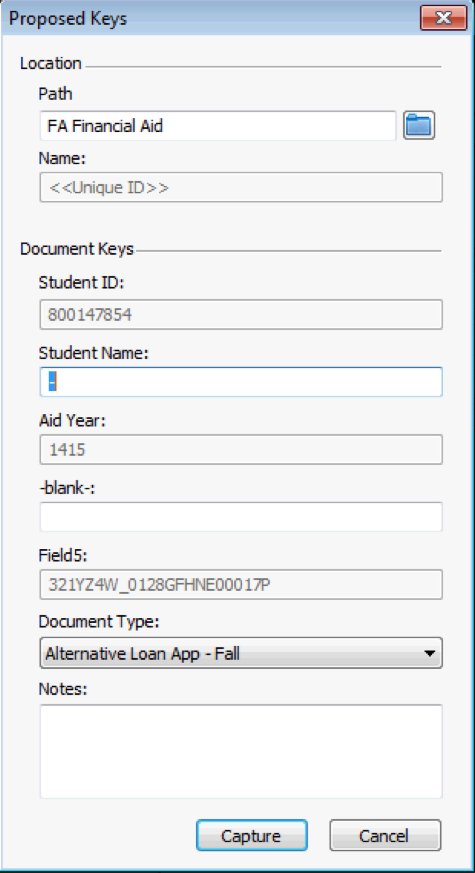
## FA Print to WF

This capture printing profile is used when printing a document. The user must be logged into BANNER and have a particular student 800# on screen.

1. Open the document to be imported into ImageNow in an application like MS Word, Adobe PDF, etc.
2. Select the **PRINT** button to print the document.
3. Select the **IMAGENOW PRINTER** option.
4. Select the **PRINT** button.
5. An **IMAGENOW PRINT** window is displayed, as shown below:



1. Ensure the **ALWAYS USE THIS PROFILE** box is checked.
2. Select the **OK** button.
3. A **PROPOSED KEYS** window will display, as shown below:



**\*Note**: The Student Name will not be populated from Banner automatically; it will contain a “**-**“ in the **STUDENT NAME** box as shown above. The student’s name will be automatically populated before the document is routed to the departmental area workflow queues.

1. Select the appropriate **DOCUMENT TYPE** in the drop-down list.
2. Select the **CAPTURE** button.
3. A **CREATE SHORTCUT** window will display, as shown below. The student’s folder is created from this screen. (\*Note: If a student’s folder already exists this window will not be displayed.)

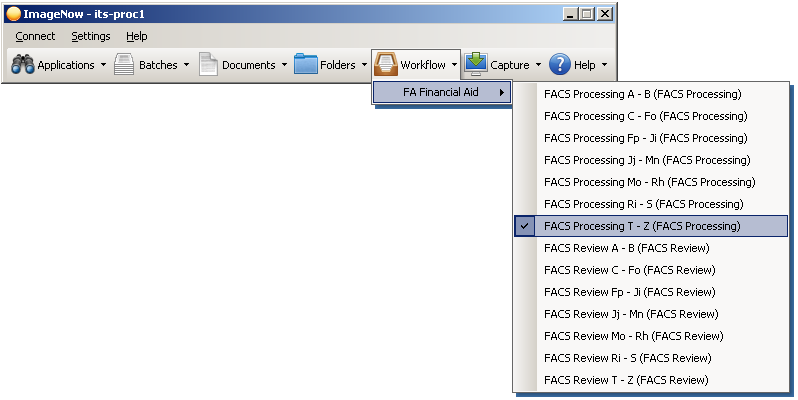


**\*Note**: The Student Name will not be populated from Banner automatically; it will contain a “**-**“ in the **STUDENT NAME** box as shown above. The student’s name will be automatically populated before the document is routed to the departmental area workflow queues.

1. Select the appropriate **Transient Study** (required) and **Unusual Enrollment** (required) values.
2. Select the **OK** button and the document will be routed to the appropriate workflow queue for the document type you selected.

# Processing Documents in FACS Processing Workflow Queues

1. Go to the appropriate **FACS Processing** workflow queues, as shown below:



1. Open the first document by double-clicking the document item in the ImageNow Explorer window grid.
2. Verify the document keys for the selected student as shown below:



1. Perform your due diligence.
2. If the document is linked to the wrong student:
   1. Identify the student ID and name and login to BANNER. Go to one of the following BANNER forms using the student’s 800# and Aid Year, if applicable:

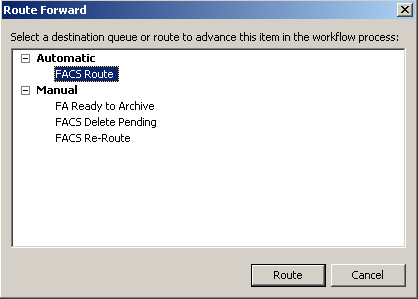
* RBAPBUD
* RHACOMM
* RNANA\*
* ROARMAN
* ROASTAT
* RPAAWRD
* RRAAREQ
* SFAWDRL
  1. Link the document to Banner by clicking the link icon; the document key fields will be populated with the Banner information.
  2. If necessary, select the appropriate **DOCUMENT TYPE** in the drop-down list.

1. Click the **ROUTE FORWARD** link or icon.
2. A **CREATE SHORTCUT** window will display as shown below. This window will create the student’s folder. (\*Note: If the student’s folder already exists, this window will not be displayed.)



**\*Note**: The Student Name will not be populated from Banner automatically; it will contain a “**-**“ in the **STUDENT NAME** box as shown above. The student’s name will be automatically populated before the document is routed to the departmental area workflow queues.

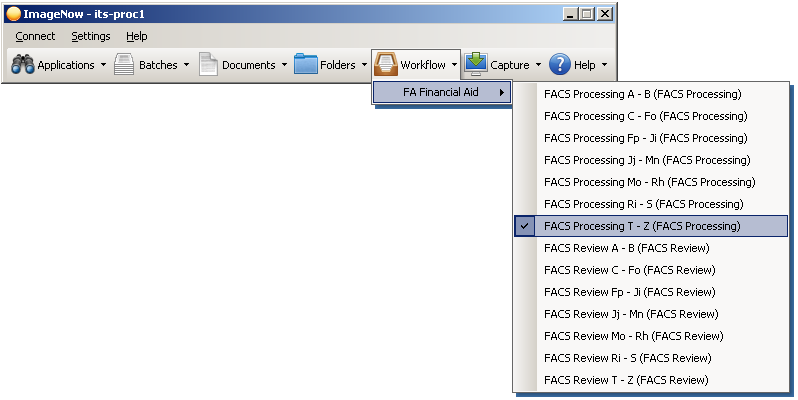
1. Select the appropriate **Transient Study** (required) and **Unusual Enrollment** (required) values.
2. Select the **OK** button.
3. A **ROUTE FORWARD** window will display, as show below:



1. If the document type was changed or you had to re-link the document, select the **FACS Re-ROUTE** workflow queue and the document will be routed to the appropriate workflow queue for the document type you selected.
2. Else, select the **FACS ROUTE** workflow queue and the document will be routed to the appropriate **FACS Review** workflow queue for review.
3. Select the **ROUTE** button.
4. The next document in the grid will open in an ImageNow Viewer.
5. Repeat steps 2 thru 13 for the remaining documents.

# Processing Documents in FACS Review Workflow Queues

1. Go to the appropriate **FACS Review** workflow queues, as shown below:



1. Open the first document by double-clicking the document item in the ImageNow Explorer window grid.
2. Verify the document keys for the selected student, as shown below:



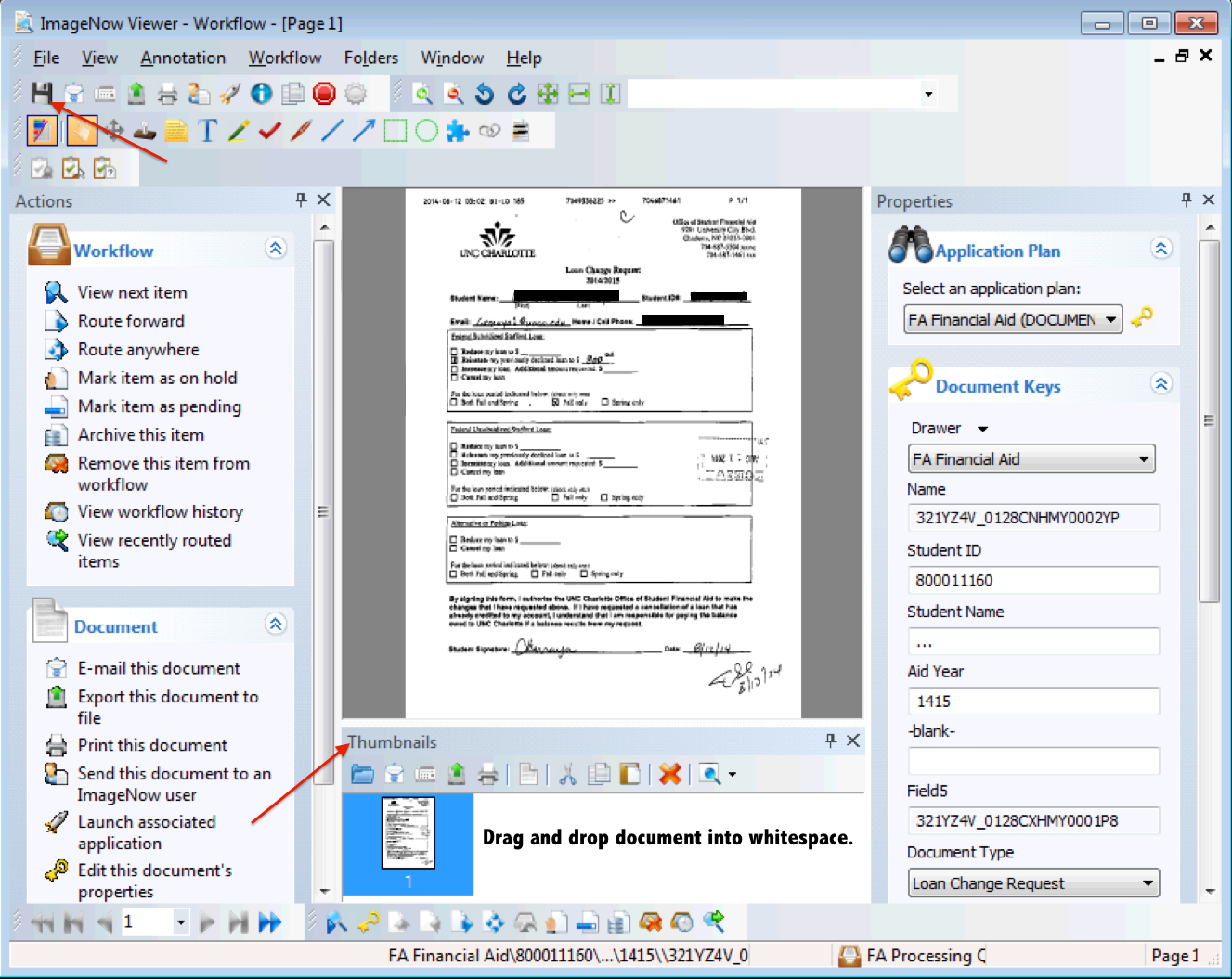
1. Perform your due diligence.
2. To return the document to the corresponding processing workflow queue, click the **ROUTE BACK** link or icon .
3. If processing is completed, click the **ROUTE FORWARD** link or icon to **ARCHIVE** the document.

# Drag and Drop Feature

Using the Drag and Drop feature, a user can select a document from the desktop and drop the document into a particular ImageNow workflow queue or document.

## Drop as a New Page

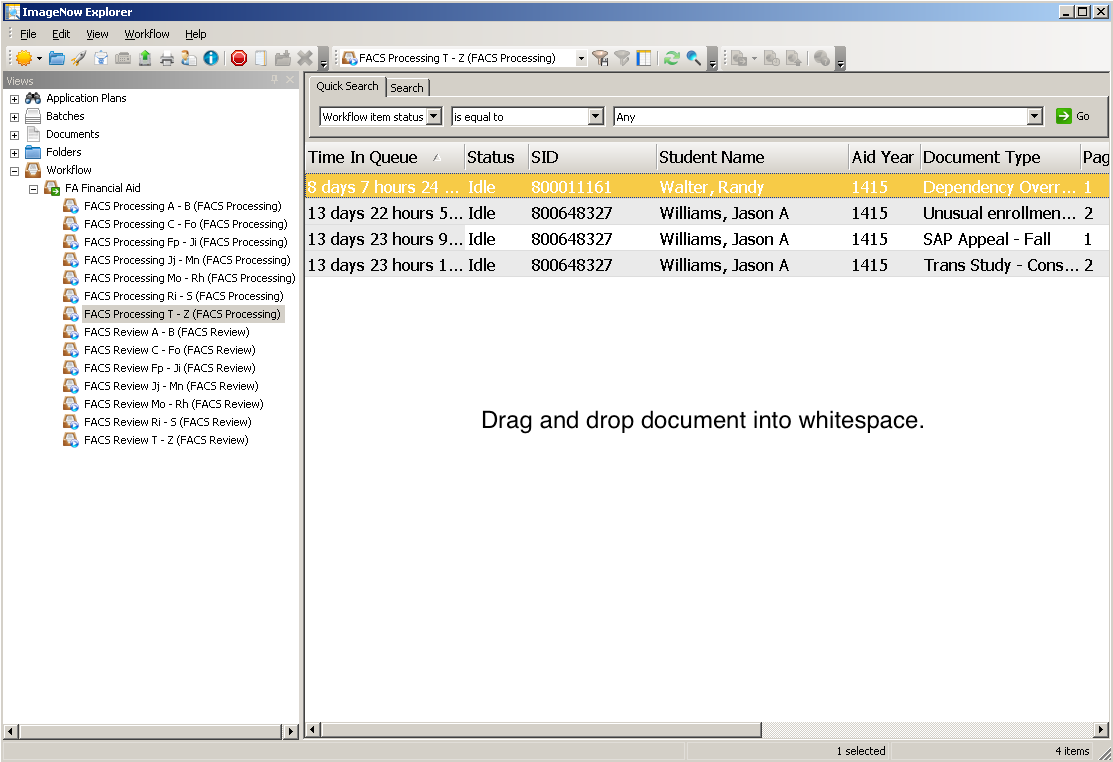
1. Open a document by double-clicking the document item in the ImageNow Explorer window grid.
2. Ensure the **THUMBNAILS** view is evoked.
3. Drag and drop a document from your desktop or selected drive into the whitespace in the **THUMBNAILS** view as show below:



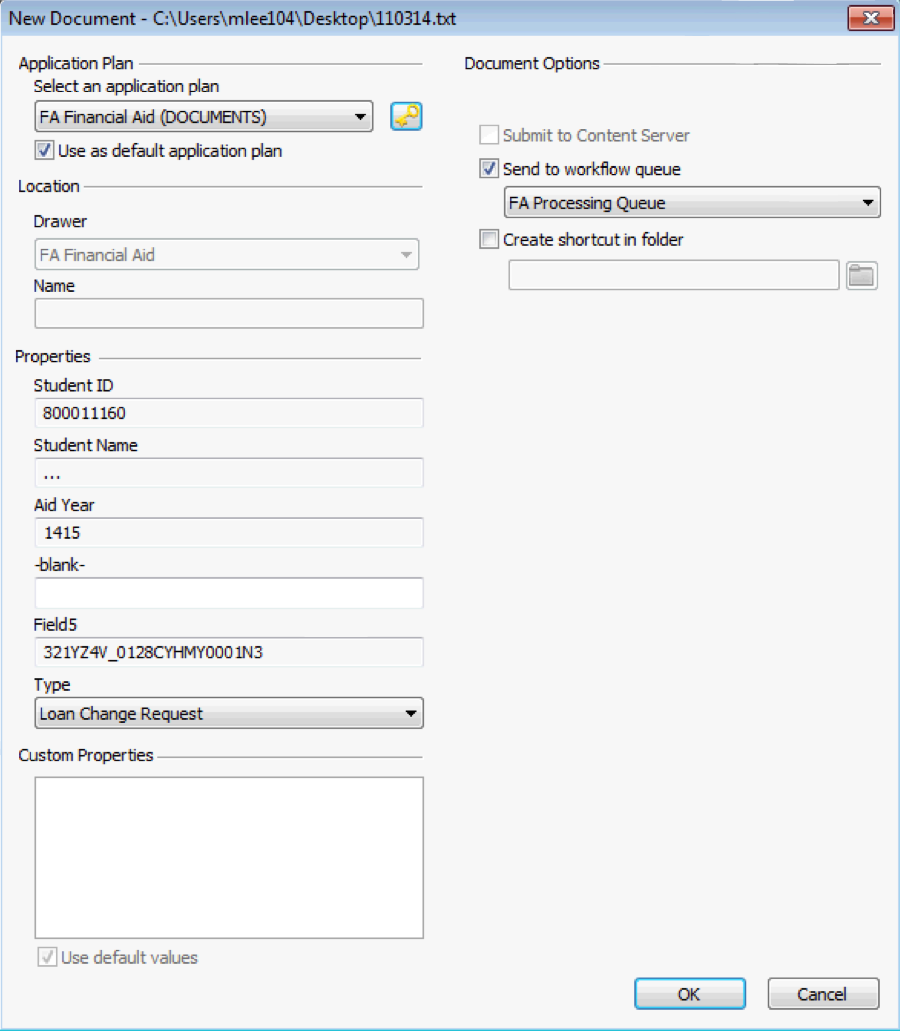
1. Click the **Save** icon  to save the added document as a new page.

## Drop as a New Document

1. In the ImageNow Explorer window, drag and drop a document from your desktop, or selected drive, into the whitespace in the grid as show below:



1. A **New Document** window will display, as shown below:



1. Login to BANNER and go to one of the following BANNER forms using the student’s 800# and Aid Year, if applicable:

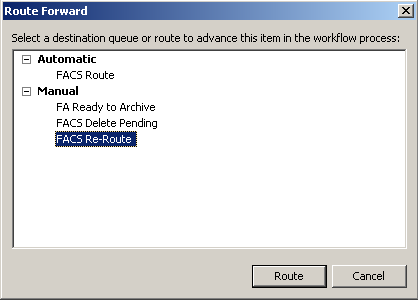
* RBAPBUD
* RHACOMM
* RNANA\*
* ROARMAN
* ROASTAT
* RPAAWRD
* RRAAREQ
* SFAWDRL

1. Link the document to Banner by clicking the link icon; the document key fields will be populated with the Banner information.
2. Select the appropriate **DOCUMENT TYPE** in the drop-down list.
3. Select the **OK** button.
4. A **CREATE SHORTCUT** window will display, as shown below. This window will create the student’s folder. (\*Note: If a student’s folder already exists, this window will not be displayed.)



**\*Note**: The Student Name will not be populated from Banner automatically; it will contain a “**-**“ in the **STUDENT NAME** box as shown above. The student’s name will be automatically populated before the document is routed to the departmental area workflow queues.

1. Select the appropriate **Transient Study** (required) and **Unusual Enrollment** (required) values.
2. Select the **OK** button.
3. Next, select the **ROUTE FORWARD** link or icon Vonda's MacMini:Users:mlee104:Desktop:Screen Shot 2015-02-11 at 7.03.18 PM.pngand the **ROUTE FORWARD** window will display, as show below:



1. Select the **FACS Re-ROUTE** workflow queue.
2. Select the **ROUTE** button and the document will be routed to the appropriate workflow queue for the document type you selected.