

Indexing Documents in OnBase

Purpose: This job aid details the process of indexing documents in OnBase after they have been scanned or uploaded into the system.

Contents

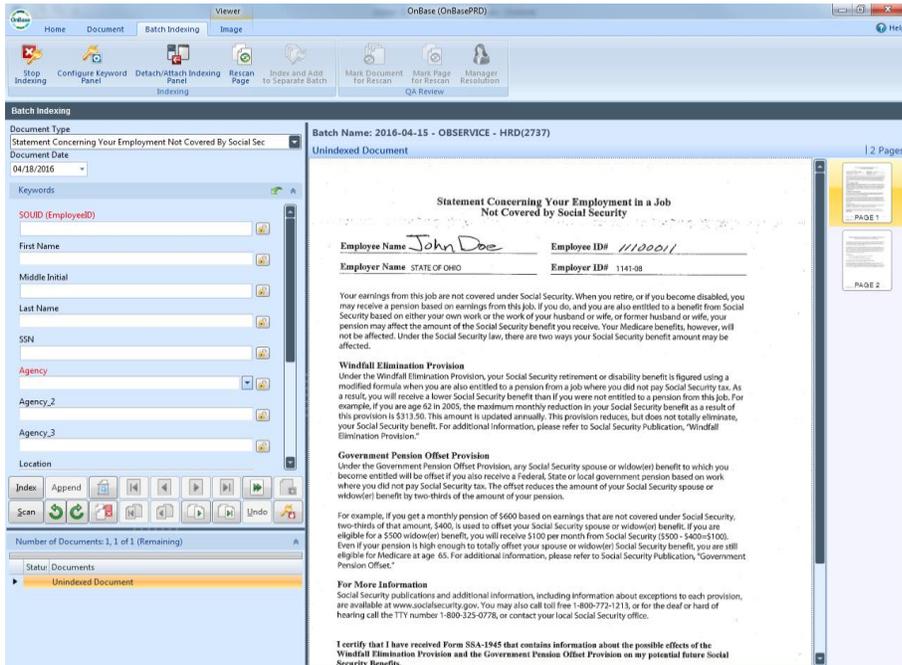
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INDEXING DOCUMENTS

1. Upload or scan the document into OnBase (refer to the **Uploading Documents to OnBase** job aid).
2. From the document indexing page, select the document type from the drop down menu (see **Appendix A: Document Type Glossary**).

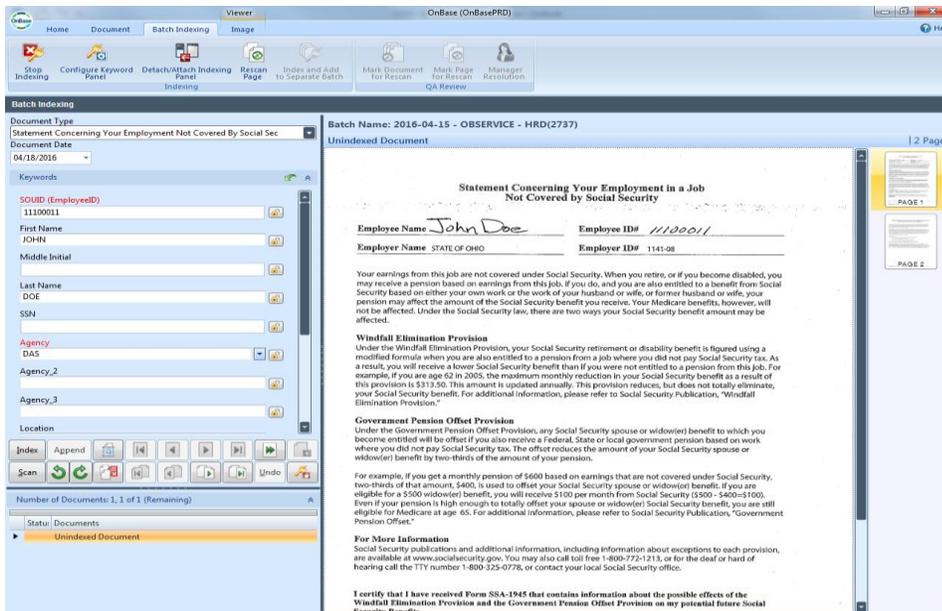
The screenshot shows the OnBase (OnBasePRD) interface. The top navigation bar includes 'Home', 'Document', 'Batch Indexing', and 'Image'. The 'Batch Indexing' tab is selected, showing a toolbar with icons for 'Stop Indexing', 'Configure Keyword Panel', 'Detach/Attach Indexing Panel', 'Rescan Page', 'Index and Add to Separate Batch', 'Mark Document for Rescan', 'Mark Page for Rescan', and 'Manager Resolution'. Below the toolbar, the 'Batch Indexing' section displays 'Batch Name: 2016-04-15 - OBSERVICE - HRD(2737)' and 'Unindexed Document'. A list of document types is shown on the left, with 'Statement Concerning Your Employment Not Covered by Social Sec' selected. The main preview area shows the document content, including fields for 'Employee Name John Doe' and 'Employee ID# 1110001', and sections for 'Windfall Elimination Provision' and 'Government Pension Offset Provision'. The document is displayed as two pages, with 'PAGE 1' and 'PAGE 2' visible on the right side.

3. Once the document type is selected; the Keywords Field will appear.

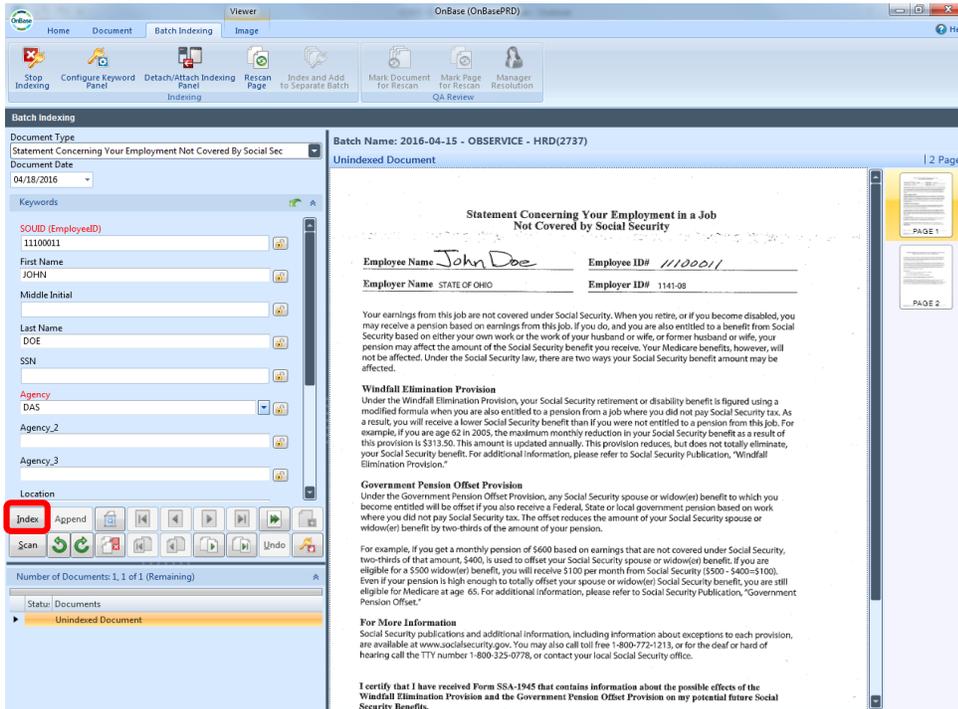


7. Enter the employee's SQUID and hit the Tab Key. This will auto populate the employee's information.

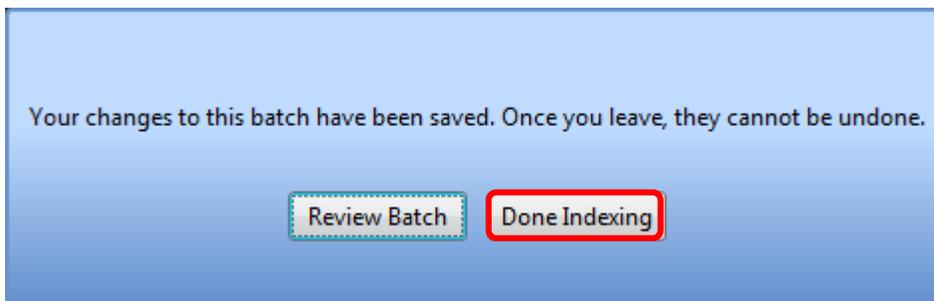
Note: Some Document Types are configured to require Keyword Values to be entered in order to create and/or retrieve documents. Required Keyword Values are displayed in red for these operations, which may include the following: Document Retrieval, Upload, and Add/Modify Keywords.



- When you have finished adding the keywords, click the **Index** button to import the document into the DMS.



- If you are indexing documents from a batch, the following prompt may appear once all documents have been indexed. Click **Done Indexing**.



APPENDIX A: DOCUMENT TYPE GLOSSARY

Document Type	Document Type Group	Reference
Application Certification	HR-Administrative	
Background Check	HR-Administrative	Any type of acknowledgement/consent, limited tax waiver & results
Civil Service Application	HR-Administrative	
Computer/Network Access	HR-Administrative	
Disability Separation Agreements	HR-Administrative	
Drug Testing Acknowledgement	HR-Administrative	Any type of acknowledgement/consent, results, & chain of custody
Employment Eligibility Verification Form (I9)	HR-Administrative	
ePerformance - Ad-hoc Evaluations	HR-Administrative	
ePerformance - Annual	HR-Administrative	
ePerformance - Career Development Plans	HR-Administrative	
ePerformance - Performance Evaluation Appeals	HR-Administrative	
ePerformance - Performance Improvement Plan	HR-Administrative	
ePerformance - Probationary	HR-Administrative	
ePerformance Attachment	HR-Administrative	
Fraud Hotline Acknowledgement (HV 66)	HR-Administrative	

Human Trafficking Acknowledgement	HR-Administrative	
Letters/Correspondence (to HR, From HR, etc.)	HR-Administrative	
Licensure, Certifications	HR-Administrative	
Military Leave Forms	HR-Administrative	
New Hire/Orientation/Policy Acknowledgements	HR-Administrative	
OAKS ID Form	HR-Administrative	Any information needed to create OAKS ID
OPERS Forms	HR-Administrative	All OPERS related forms
Other Administrative Documents	HR-Administrative	To be used for Agency Specific documents that do not have a Doc Type. Agencies should keep a list for doc types that should be filed under this Doc Type for easy searching
Outside Employment Notification	HR-Administrative	To be used when an employee notifies agency of secondary employment
Outside Employment Requests/Responses	HR-Administrative	To be used for public records requests
Poll Workers Forms	HR-Administrative	
Position Description	HR-Administrative	To be Indexed by PN
Position Description (Emp. File)	HR-Administrative	To be Indexed by SOUID when adding to an employee file
Pre-Employment Packet	HR-Administrative	Can consist of any documents User deems applicable. Not to be used for documents that will need to be ePar attachments
Prior Service Form & Information	HR-Administrative	
Promotion/HQ Change/Changes in Position Acknowledgements	HR-Administrative	Can also use for Tranfer Consents
Reference Checks	HR-Administrative	

Resume/CV/ Cover Letter	HR-Administrative	
Security Access Sheet	HR-Administrative	Can include building or ID Badge access, or software requirements
Statement Concerning Your Employment Not Covered by Social Security	HR-Administrative	
Supplemental Employment Agreement	HR-Administrative	
Supplemental Nepotism Statement (ADM 4173)	HR-Administrative	
Training, Education documents	HR-Administrative	
Unemployment Compensation	HR-Administrative	
Unclassified Services Explanation & Acknowledgement	HR-Administrative	
Accident or Illness Form	HR-FMLA/Workers Comp/Disability	
ADA	HR-FMLA/Workers Comp/Disability	
Adjudication Order	HR-FMLA/Workers Comp/Disability	
Agency Disability Questionnaire	HR-FMLA/Workers Comp/Disability	
Application for Disability - Employee Statement (ADM 4310)	HR-FMLA/Workers Comp/Disability	
Application for Disability - Employer Statement (ADM 4312)	HR-FMLA/Workers Comp/Disability	

C+84	HR-FMLA/Workers Comp/Disability	
C86	HR-FMLA/Workers Comp/Disability	
C-9	HR-FMLA/Workers Comp/Disability	
Certified Letter - Acknowledgement of Appeal - 7 Day Letter	HR-FMLA/Workers Comp/Disability	
Childbirth/Adoption	HR-FMLA/Workers Comp/Disability	
Common Pleas Notification	HR-FMLA/Workers Comp/Disability	
Common Pleas Order	HR-FMLA/Workers Comp/Disability	
Decision Letter	HR-FMLA/Workers Comp/Disability	This is the DAS Disability generated letter that goes in file, to Agency & to employee
DHO/SHO Orders	HR-FMLA/Workers Comp/Disability	
Disability Agreement (ADM 4313)	HR-FMLA/Workers Comp/Disability	
Disability Request for Appeal	HR-FMLA/Workers Comp/Disability	
Doctor Letter for Light Duty	HR-FMLA/Workers Comp/Disability	
Email	HR-FMLA/Workers Comp/Disability	
FMLA Certifications	HR-FMLA/Workers Comp/Disability	
FMLA Designation Notice	HR-FMLA/Workers Comp/Disability	
FMLA Notice of Eligibility and Rights Responsibilities	HR-FMLA/Workers Comp/Disability	

Functional Capacity Evaluation	HR-FMLA/Workers Comp/Disability	
Green Card - Acknowledgement of Hearing	HR-FMLA/Workers Comp/Disability	
Green Card - Returned Mail	HR-FMLA/Workers Comp/Disability	
Green Card Receipt	HR-FMLA/Workers Comp/Disability	
Hearing Docket Form	HR-FMLA/Workers Comp/Disability	
IME - Agency	HR-FMLA/Workers Comp/Disability	
In-House Copying Sheet	HR-FMLA/Workers Comp/Disability	
In-House Medical Review	HR-FMLA/Workers Comp/Disability	
Initial Application	HR-FMLA/Workers Comp/Disability	To be considered a complete initial application, the ADM 4310, ADM 4312 & PD must be submitted together. It may also include psychiatric questionnaire, work capacity form, agency questionnaire, etc. in addition to the required forms.
Injury/Illness Report (ADM 4303)	HR-FMLA/Workers Comp/Disability	
Medco-14s	HR-FMLA/Workers Comp/Disability	
Medical Records from Healthcare Provider	HR-FMLA/Workers Comp/Disability	
Medical Report	HR-FMLA/Workers Comp/Disability	
Medical Report - Office Notes	HR-FMLA/Workers Comp/Disability	
Medical Report - Operative Report	HR-FMLA/Workers Comp/Disability	

Mental Health	HR-FMLA/Workers Comp/Disability	
Miscellaneous	HR-FMLA/Workers Comp/Disability	
Ohio EAP Agreements	HR-FMLA/Workers Comp/Disability	
Other Medical	HR-FMLA/Workers Comp/Disability	
Physician Verification Notice	HR-FMLA/Workers Comp/Disability	
Report and Recommendation	HR-FMLA/Workers Comp/Disability	
Report of Contact	HR-FMLA/Workers Comp/Disability	
Retirement Application	HR-FMLA/Workers Comp/Disability	
Return Mail	HR-FMLA/Workers Comp/Disability	
RTW Notice	HR-FMLA/Workers Comp/Disability	
Salary Continuation request/extension	HR-FMLA/Workers Comp/Disability	
Statement of Psychiatric Disability- Psyche Questionnaire(ADM 4316)	HR-FMLA/Workers Comp/Disability	
Supplemental Application	HR-FMLA/Workers Comp/Disability	
Supplemental Report - Employee Statement (ADM 4311)	HR-FMLA/Workers Comp/Disability	
Supplemental Report - Employer Statement	HR-FMLA/Workers Comp/Disability	

Third Party Copying Sheet	HR-FMLA/Workers Comp/Disability	
Third Party Medical Review	HR-FMLA/Workers Comp/Disability	
Transitional Work Program (TWP) / Book Rehab / BRV Referral	HR-FMLA/Workers Comp/Disability	
Work Capacity Form (ADM 4317)	HR-FMLA/Workers Comp/Disability	
Work Related	HR-FMLA/Workers Comp/Disability	
Workers' Comp Correspondence- Letters from BWC, etc.	HR-FMLA/Workers Comp/Disability	
Investigation Docs	HR-Labor	Can include video, audio and any document compiled during Investigation
MOUs	HR-Labor	
Oral Reprimands	HR-Labor	
Pattern Abuse Notice	HR-Labor	
Written Reprimands	HR-Labor	
Benefit enrollment/change form	HR-Payroll and Benefits	
Benefit Refunds	HR-Payroll and Benefits	
Benefits - Eligibility Appeal Packet	HR-Payroll and Benefits	
Change of Address Cards	HR-Payroll and Benefits	
Deferred Compensation	HR-Payroll and Benefits	
Dependent Eligibility Documents	HR-Payroll and Benefits	

Direct Deposit Forms	HR-Payroll and Benefits	
Final Payroll Certification	HR-Payroll and Benefits	
Healthcare Waiver Form	HR-Payroll and Benefits	
Insurance Enrollment Forms	HR-Payroll and Benefits	
Jury Duty - Copy of Check and Subpoena	HR-Payroll and Benefits	
Leave Conversion Form	HR-Payroll and Benefits	
Other Benefit Documents	HR-Payroll and Benefits	To be used for Agency Specific documents that do not have a Doc Type. Agencies should keep a list for doc types that should be filed under this Doc Type for easy searching
Other Payroll Documents	HR-Payroll and Benefits	To be used for Agency Specific documents that do not have a Doc Type. Agencies should keep a list for doc types that should be filed under this Doc Type for easy searching
Over/Under Payments & Financial Settlements	HR-Payroll and Benefits	
Payroll Deduction Cards and Agreements	HR-Payroll and Benefits	
Proof of dependent eligibility	HR-Payroll and Benefits	Any student affidavit, proof of divorce/marriage
Request for Refunds	HR-Payroll and Benefits	
Tax Forms (Federal, State, City)	HR-Payroll and Benefits	Any tax form related document
Union Authorization Cards	HR-Payroll and Benefits	

Verification of Employment/Income	HR-Payroll and Benefits	
ePAR - Data Change Current Employee	HR-Personnel Actions (ePar)	
ePAR - Discipline	HR-Personnel Actions (ePar)	
ePAR - Hire-Rehire	HR-Personnel Actions (ePar)	
ePAR - Termination	HR-Personnel Actions (ePar)	
ePAR Attachment	HR-Personnel Actions (ePar)	
ePAR Attachment - Discipline	HR-Personnel Actions (ePar)	
Other Personnel Action	HR-Personnel Actions (ePar)	<p>To be used for Non ePAR/Paper PAs:</p> <p>(DTA) Data Change- (CPN) Cancel-Promotion</p> <p>(DTA) Data Change- (FCE) CBU Exemption (Fid/Confiden)</p> <p>(DTA) Data Change- (GTA) Grievance Term Adjustment</p> <p>(DTA) Data Change- (STR) Step Reduction</p> <p>(DTA) Data Change- (STX) Step X (90)</p> <p>(LOA) Leave of Absence- (EED) Exempt Educational Leave</p> <p>(PAY) Pay Rate Change-(EID) Elect Office Increase Declined</p> <p>(PAY) Pay Rate Change- (SDN) Step Denied</p> <p>(PLA) Payroll Leave Action- (BEL) BU Educational Leave</p>