Intelligent Document Processing (IDP) System Guide for Enrollers

Overview

The Intelligent Processing (IDP) provides Covered California a way of electronically verifying documents that have been uploaded by Consumers and Admin users using Google Document Artificial Intelligence (AI). This process allows real-time review of uploaded documents and it's able to match the information needed in CalHEERS.

IDP only reviews verifications for Citizenship, Incarceration, Income, and Lawful Presence documents only.

Adding a Document or Uploading a file

Consumers, Enrollers, and Admin upload documents on the *Documents and Correspondence* page and upload files on the *Eligibility Documents* page.
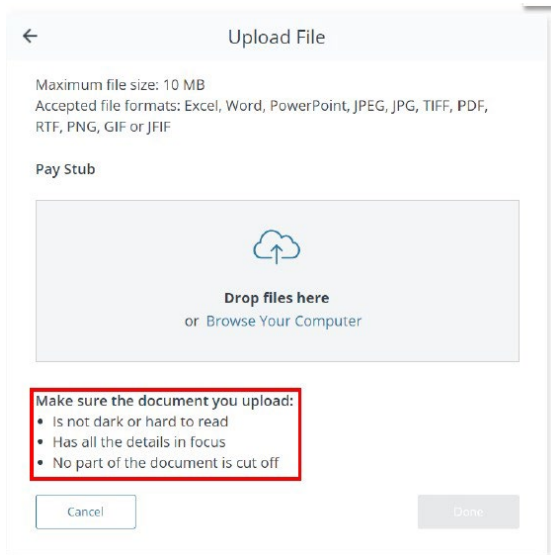
Steps

Once a user had uploaded the requested files, a popup displays the following:

- *Document Preview*: A preview of the uploaded document

- *Document Details* section: Displays the information labels that the IDP is looking for and the correlated information identified in the document

- *Are all your document details correct?* question

  o Yes radio button

  o No, but I want to submit this document anyway radio button

- **Upload New File** button displays the *Upload File* popup without saving the uploaded document

- **Continue** button saves the upload and closes the popup

Note: If the user clicks the **Upload New File** or **Continue** button without selecting a radio button for the *Are all your document details correct?* question, an error message popup appears.

Error messaging displays in the *Review File [#]* popup when the IDP fails to extract information from an uploaded document with the following options:

- **Upload New File** button does not save the current document and navigates the user to the *Upload File* popup.

- **Continue** button saves the current document and navigates the user to the *Upload File* popup.
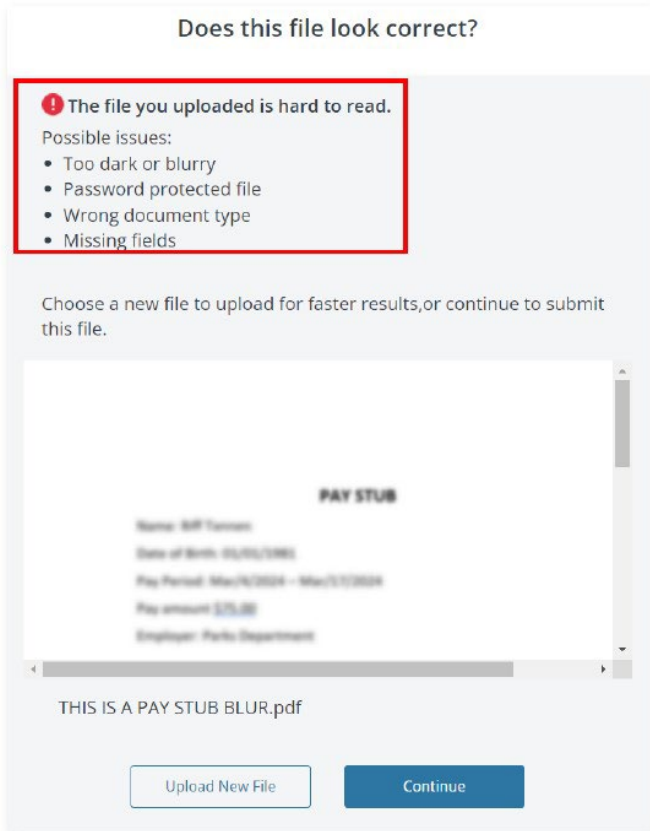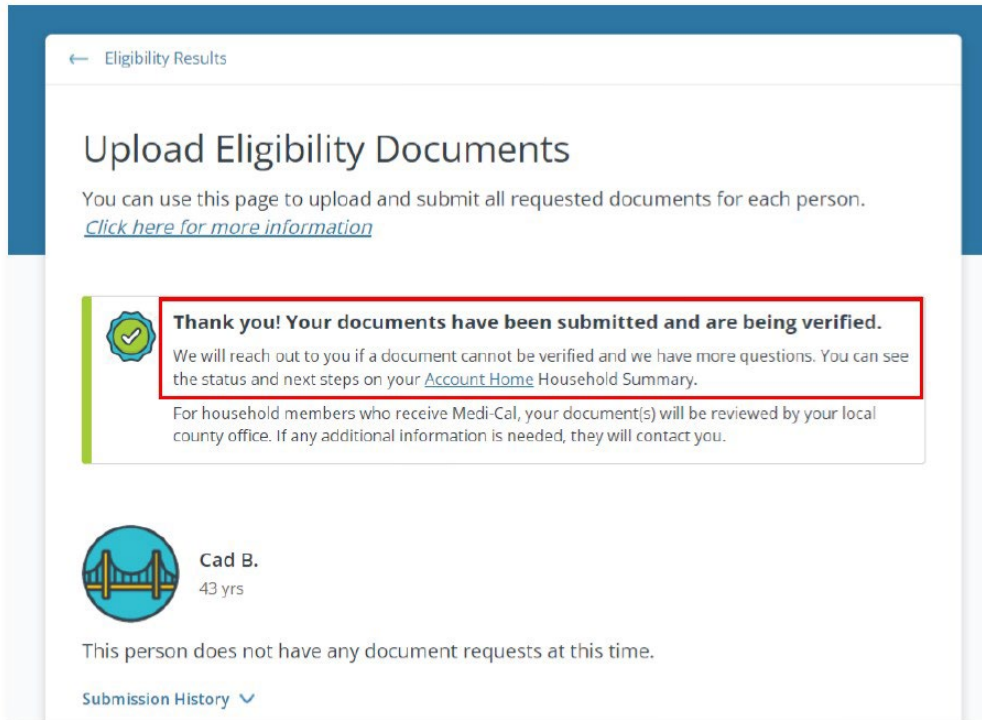
If there are data elements that could not be verified by the IDP, a Reasonable Opportunity Period (ROP) date will be generated for the Consumer to provide that document that has all the data elements required to verify the information.

When an IDP process is unsuccessful, the *Household Summary* popup displays a new *Under Review* actions type.
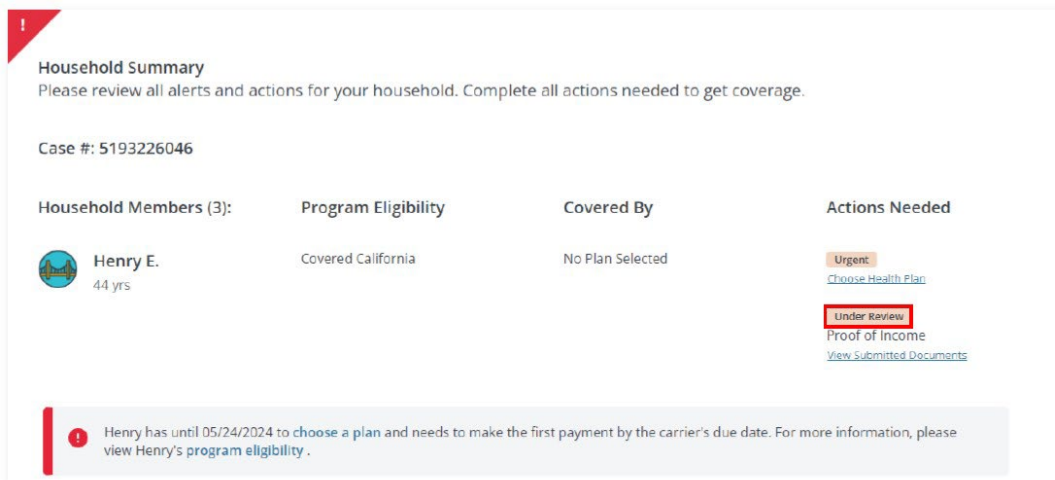
After all verification documents are submitted, a green banner displays on the *Upload Eligibility Documents* page.