



# 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.

Add Document

Upload New Document | Link ECM Document

Document Category  
Select Option

Document Type  
Select Option

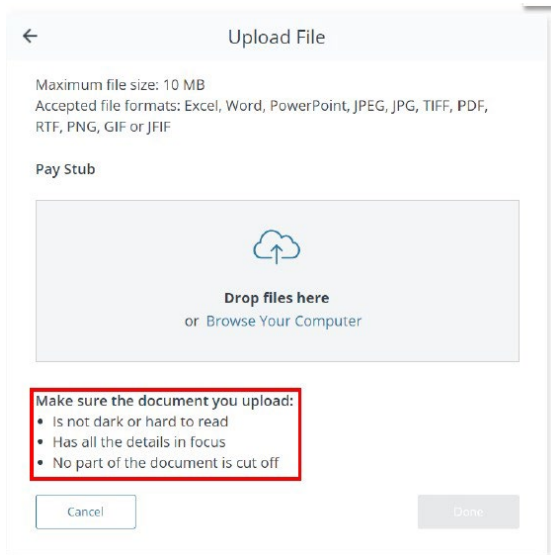
Maximum file size: 10 MB  
Accepted file formats: Excel, Word, PowerPoint, JPEG, JPG, TIFF, PDF, RTF, PNG, GIF or JFIF

Drop a file here  
or [browse your computer](#)

**Make sure the document you upload:**

- Is not dark or hard to read
- Has all the details in focus
- No part of the document is cut off

Cancel | Upload



## 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
  - Yes radio button
  - 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

Does this file look correct?

Document Preview

PAY STUB

Name: Cad Bane  
Date of Birth: 01/01/1981  
Pay Period: Mar/4/2024 - Mar/17/2024  
Pay amount \$750.00  
Employer: Parks Department

THIS IS A PAY STUB.pdf

Document Details

Employee Name: Cad Bane	Paystub Type: Unable to Extract
Pay Start Date: Mar/4/2024	Gross Earnings: Unable to Extract
Pay End Date: Mar/17/2024	Pay Date: 01/01/1981
Employer Name: Unable to Extract	SSN: Unable to Extract

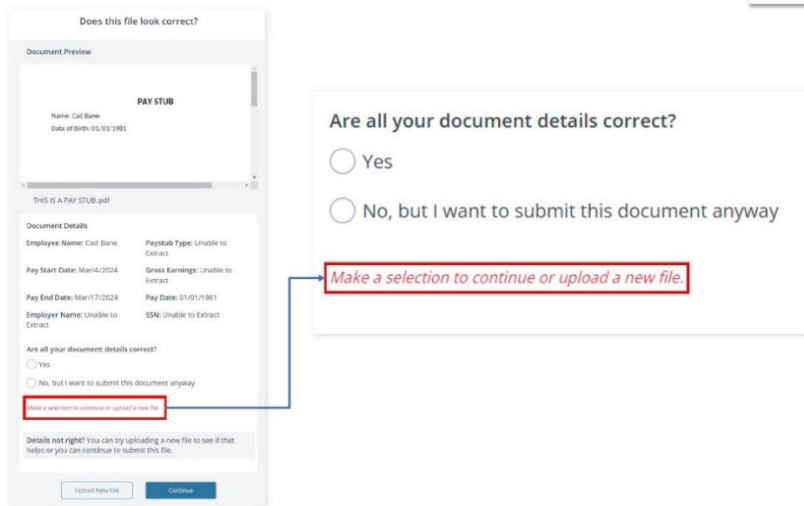
Are all your document details correct?

Yes

No, but I want to submit this document anyway

Details not right? You can try uploading a new file to see if that helps or you can continue to submit this file.

**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.



Does this file look correct?

Document Preview

**PAY STUB**

Name: Cal Bone  
Date of Birth: 03/03/1981

THIS IS A PAY STUB.pdf

Document Details

Employee Name: Cal Bone	Paystub Type: Unable to Extract
Pay Start Date: Mar14/2024	Gross Earnings: Unable to Extract
Pay End Date: Mar17/2024	Pay Date: 01/01/1981
Employer Name: Unable to Extract	SSN: Unable to Extract

Are all your document details correct?

Yes

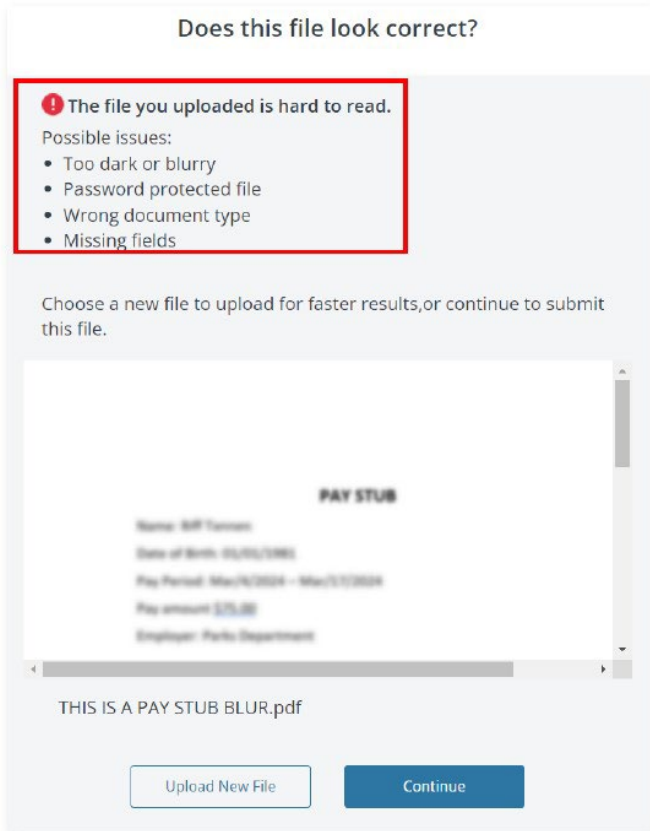
No, but I want to submit this document anyway

**Make a selection to continue or upload a new file.**

Details not right? You can try uploading a new file to see if that helps or you can continue to submit this file.

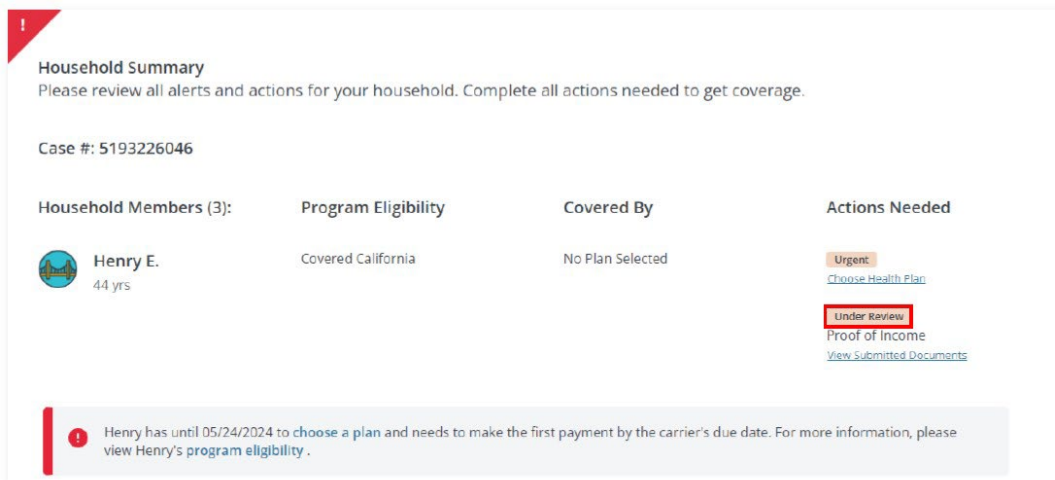
Error messaging displays in the *Review File [#]* popup when the IDP fails to extract information from an uploaded document with the following options:

- **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.

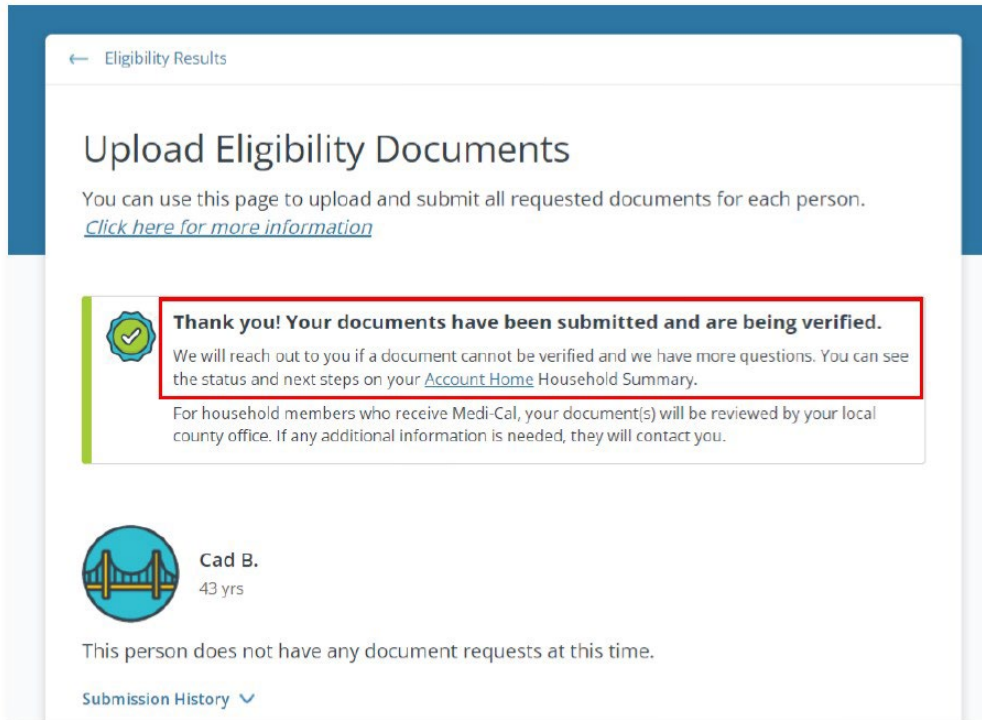


If there are data elements that could not be verified by the IDP, a Reasonable Opportunity Period (ROP) date will be generated for the Consumer to provide that document that has all the data elements required to verify the information.

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.



← Eligibility Results

## Upload Eligibility Documents


You can use this page to upload and submit all requested documents for each person.  
[Click here for more information](#)



**Thank you! Your documents have been submitted and are being verified.**

We will reach out to you if a document cannot be verified and we have more questions. You can see the status and next steps on your [Account Home](#) Household Summary.

For household members who receive Medi-Cal, your document(s) will be reviewed by your local county office. If any additional information is needed, they will contact you.



**Cad B.**  
43 yrs

This person does not have any document requests at this time.

[Submission History](#) ▾