

MEDES — End-user Guide

Open a member exchange case, receive and classify evidence, complete independent document and eligibility work, then generate accountable correspondence and inspect its delivery outcome.

Use the current tenant, profile and permitted actions. Screenshots illustrate the application; example records and date fields may differ in your environment.

Contents

1. Operating journey and preparation
2. Choose the procedure for your business task
3. Find the current member and open one exchange case
4. Triage, split and index a PDF packet
5. Request, submit and accept recipient-bound evidence
6. Review evidence and complete assigned case/eligibility work
7. Prepare a complete packet before external delivery
8. Dispatch once, reconcile status and record follow-up
9. Detailed reference · About this guide and availability
10. Detailed reference · MEDES workflow and platform responsibilities
11. Detailed reference · Getting access, signing in and choosing a role
12. Detailed reference · Member context and exchange cases
13. Detailed reference · Find, upload and inspect documents
14. Detailed reference · Intake, PDF splitting and classification
15. Detailed reference · Request and receive secure partner uploads
16. Detailed reference · Independent document review and corrections
17. Detailed reference · Case work, assignments and eligibility decisions
18. Detailed reference · Secure messages and partner mailbox
19. Detailed reference · Templates, fax covers and letter preparation
20. Detailed reference · Queue, track and recover external delivery
21. Detailed reference · Reply to correspondence and record customer follow-up
22. Detailed reference · Role dashboards, reports and analytics
23. Detailed reference · Bell notifications, email links and next actions
24. Detailed reference · Administration and configuration handoffs
25. Detailed reference · Troubleshooting and getting help
26. Detailed reference · Terminology, field sources and record history

- 27. Detailed reference · Appendix A. Complete screen and workflow entry index
- 28. Detailed reference · Appendix B. Proposed role and action access reference
- 29. Detailed reference · Appendix C. Custodia-to-MEDES handoff and operator quick reference
- 30. Cross-module handoffs and the record references to retain
- 31. Problem → responsible action → safe continuation

Operating journey and preparation

Open a member exchange case, receive and classify evidence, complete independent document and eligibility work, then generate accountable correspondence and inspect its delivery outcome.

Worked example and preparation

Use a synthetic current member, one exchange case, a non-sensitive PDF packet, an eligible named upload recipient and distinct document/case/eligibility reviewers. Keep all member and document references within the intended tenant.

Before the live journey

Technical installation and target activation are separate. The last recorded target observation showed ungranted MEDES roles, disabled registered APIs and a disabled review route. Verify reviewed roles, enabled APIs, published workflow dependencies and provider setup before a live business demonstration; document a specific blocker if activation remains incomplete.

Responsibilities

Role	Responsibility
Case operator	Creates exchange cases and maintains member/evidence context.
Intake/document reviewer	Triages, indexes and independently reviews admitted evidence.
Case/eligibility worker	Acts on assigned case work and required eligibility checks.
Communications operator	Prepares and tracks authorized correspondence and external delivery.

Terms used in this module

Term	Meaning
Exchange case	The member-centered business context linking evidence and communication.
Intake state	The document triage/classification stage, separate from security admission.
Review/task	Independent decision and current assigned case work.
Packet / delivery	Generated correspondence and its separate dispatch outcome.

The procedures below explain operation. Application captures use illustrative records. Record actual demonstration and UAT outcomes separately; a written expected result is not a recorded pass.

CHAPTER 2

Choose the procedure for your business task

Business journey	Open the detailed steps
Member case and admitted evidence	<u>Find the current member and open one exchange case</u> <u>Triage, split and index a PDF packet</u> <u>Request, submit and accept recipient-bound evidence</u>
Independent decision and complete correspondence	<u>Review evidence and complete assigned case/eligibility work</u> <u>Prepare a complete packet before external delivery</u>
Accountable delivery and follow-up	<u>Dispatch once, reconcile status and record follow-up</u>

CHAPTER 3

Find the current member and open one exchange case

Open	Who acts
MEDES → member context / exchange cases	Case operator

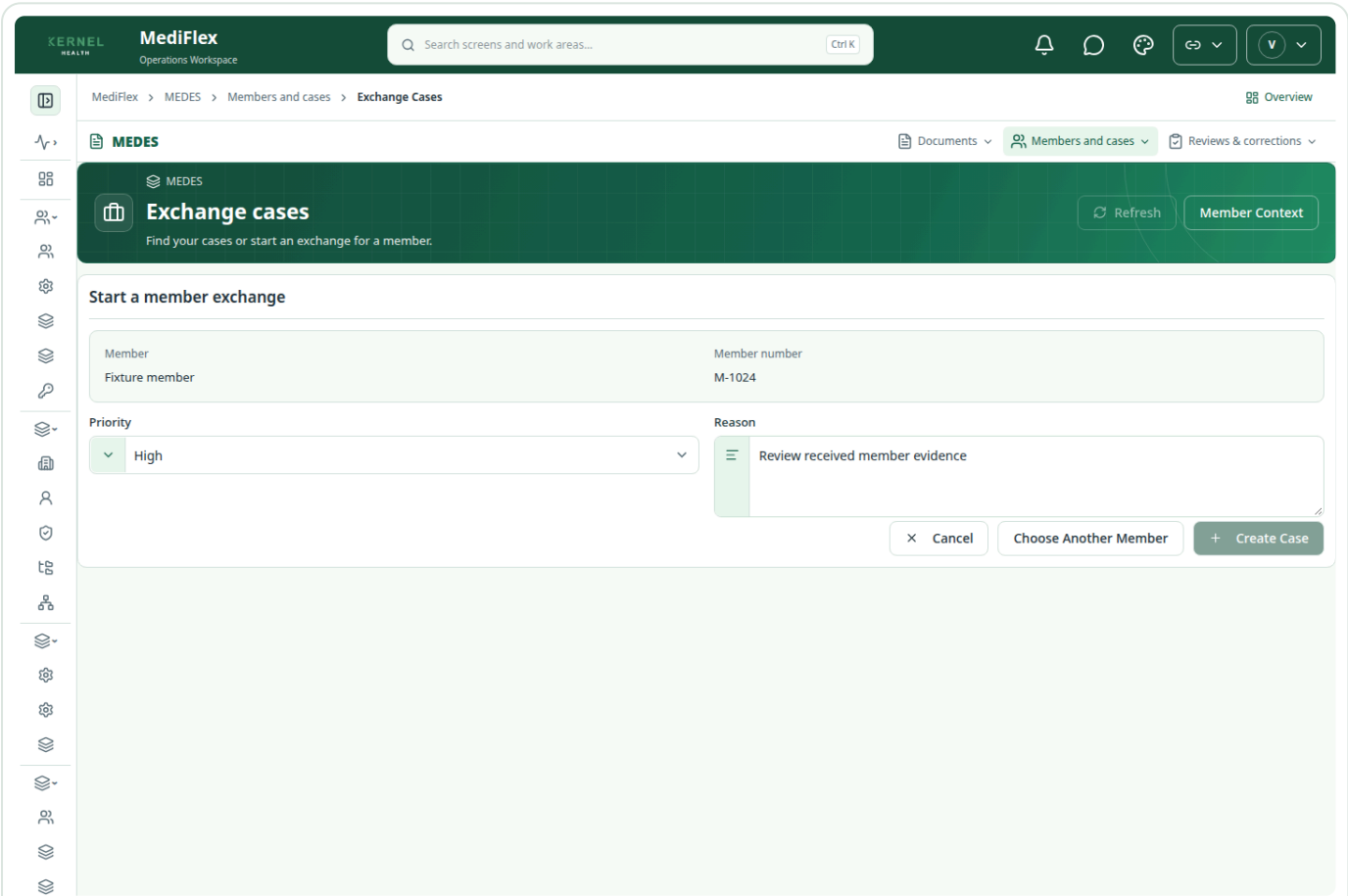
Anchor evidence and communication to the correct member and case before uploading or reviewing documents.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Member reference	The selected current synthetic member	A matching display name alone does not establish identity.
Case purpose / type / reason	The offered business context and clear need	Use the approved controlled values.
Case reference	The returned exchange identity	Keep it distinct from member, workflow instance and document IDs.
Case stage / linked evidence	The current operating context	Creating a case does not approve evidence or decide eligibility.

Procedure and expected result

Step	Action	Expected visible result
1	Search and verify the current member context.	The intended synthetic member is selected.
2	Inspect existing exchange cases before opening another.	A case for the same business purpose can be reused.
3	Create the case with the offered details and reason.	A durable exchange-case reference is issued.
4	Reopen the case and inspect member, stage and linked evidence.	The case context survives navigation.
5	Retain its reference for document indexing and later correspondence.	Each downstream handoff can identify the same case.



SCREEN 2

Create an exchange case for the selected current member.

Illustrative application screen · select to enlarge.

When the result differs

Observation	Next action
MEDES is absent from the menu	Verify native module activation, role grants and APIs; do not insert a static menu as a workaround.
The member/context is stale	Reload and verify the current business context before saving.

Completion check

Show member and case references as distinct identities with no automatic eligibility decision.

Continue

Capture or receive evidence and explicitly bind it to this case during indexing.

CHAPTER 4

Triage, split and index a PDF packet

Open	Who acts
MEDES → Documents → Document Intake Queue	Intake operator

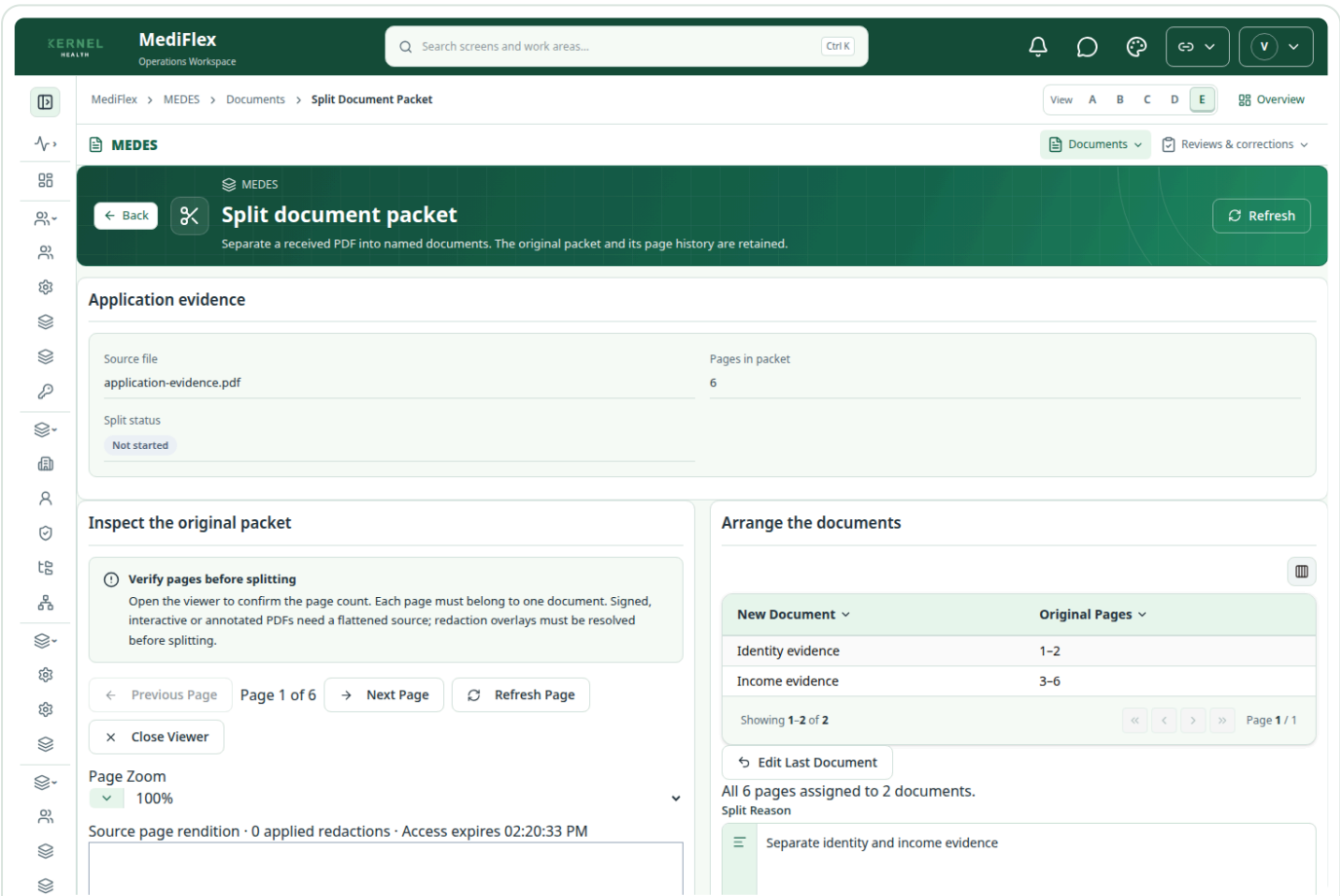
Preserve the original packet while creating correctly bounded child documents and their business classification.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Intake decision / reason	Begin, confirm single document, mark for splitting or reject when offered	The current intake state controls which actions are eligible.
Child title / page start/end	Contiguous groups covering the actual PDF pages exactly once	Verify the viewer's page count; do not guess boundaries.
Classification / metadata	The effective content type and required schema values	Security admission and business classification are separate checks.
Business context	The selected exchange case	Indexing must reference the intended current case/member.

Procedure and expected result

Step	Action	Expected visible result
1	Open the New intake item and inspect its admitted source document.	The actual packet and security state are known.
2	Begin intake, then confirm single document or mark for splitting with a reason.	The triage stage records the chosen path.
3	For a packet, inspect page count and add titled child ranges in page order.	Every page belongs to one contiguous group without gaps/overlap.
4	Review and complete the supported split.	The original is preserved and child documents have their own references.
5	Classify/index each eligible child with required metadata and the correct case context.	Each child can proceed to independent business review.
6	Read back intake and document history.	Source packet, split plan and children remain traceable.



SCREEN 4

Split plan: named child documents and the original PDF page ranges.

Illustrative application screen · select to enlarge.

When the result differs

Observation	Next action
Ranges do not cover the packet correctly	Correct the last group or split plan before execution.
A file is quarantined or unavailable	Resolve admission with the custody/security owner before business processing.

Completion check

Show original packet, exact ranges, child identities and indexed case context.

Continue

Request independent document review for each required admitted/indexed version.

CHAPTER 5

Request, submit and accept recipient-bound evidence

Open	Who acts
MEDES → Secure Upload Workspace	Receiving operator and named authorized recipient

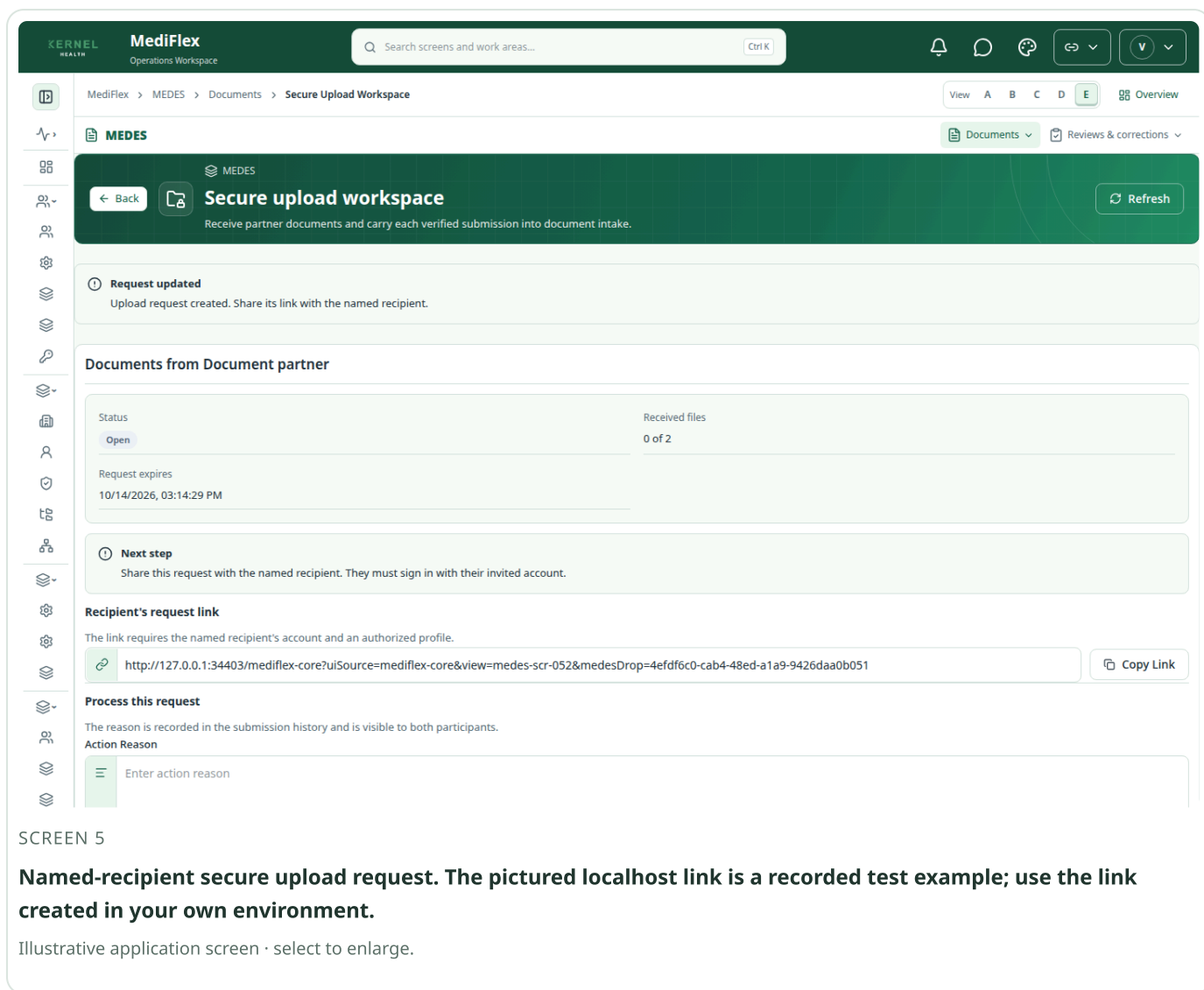
A secure-upload link is bound to an eligible recipient and request; copying it does not grant anonymous upload access.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Recipient	An active account with approved secure-upload access	The actual recipient must sign in with eligible context.
Maximum files / Expires in hours	1–20 files; 1–168 hours in the inspected form	Use the smallest practical training bound.
Requested documents and reason	Precisely explain the evidence needed	The recipient should not have to infer missing business requirements.
Submit documents / Begin intake	Separate recipient and receiving-team actions	Uploading bytes alone does not submit the complete file set.

Procedure and expected result

Step	Action	Expected visible result
1	Find the intended eligible recipient and create the bounded request.	The request identifies recipient, expiry and required evidence.
2	Open the saved request and copy its recipient-bound link through an authorized channel.	Link creation is not evidence that files were submitted.
3	The named recipient signs in, reads the request and uploads the permitted files.	The files remain attached to that request.
4	The recipient verifies the file set and selects Submit documents with a reason.	The receiving team sees Submitted state.
5	The receiving team checks each file's security availability and selects Begin intake when eligible.	The request becomes Accepted and files enter the receiving process.
6	Open each admitted file and classify/index its business context.	The receiving team deliberately establishes the case link.



SCREEN 5

Named-recipient secure upload request. The pictured localhost link is a recorded test example; use the link created in your own environment.

Illustrative application screen · select to enlarge.

When the result differs

Observation	Next action
The link is opened by another account	Use the intended recipient; a copied URL does not expand access.
The request expired or a file failed screening	Resolve the allowed request/file state before attempting acceptance.

Completion check

Show recipient-bound access, upload versus submission, acceptance and intake handoff.

Continue

Continue document review and case work using the admitted files.

Review evidence and complete assigned case/eligibility work

Open	Who acts
MEDES → selected document review; Case work → Work Queue	Independent document reviewer and eligible assigned case/eligibility worker

Carry admitted evidence into an attributable business decision, preserving independent-stage restrictions.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Document version / review reason	The indexed version actually inspected	A later content version may require renewed review.
Review stage / Task status / Assigned to	Current workflow and ownership	Task visibility is not authority to complete it.
Claim / release / hold / resume / request information	Choose the offered action matching the work state	Requesting information does not itself send a message or complete review.
Eligibility outcome / effective date / evidence checklist / decision reason	Complete the stage's actual required checks	An earlier case reviewer may be ineligible for the independent eligibility stage.

Procedure and expected result

Step	Action	Expected visible result
1	Complete required independent document reviews and inspect the case evidence list.	The case uses admitted reviewed evidence.
2	Start case review and inspect its saved workflow handoff.	A case work record and task stage are issued.
3	Open My work or Available to claim and claim only eligible work.	The assignment names the responsible worker.
4	Inspect the case and documents before deciding; use hold/information actions where justified.	Outstanding requirements remain visible.
5	At eligibility, complete the required outcome, date, checklist and reason as an eligible independent worker.	The decision follows the stage's business checks.
6	Read back case stage, task outcome and audit.	Workflow completion and business decision can be correlated.

Prepare a complete packet before external delivery

Open	Who acts
MEDES → case correspondence → templates / fax covers / letter preparation	Communications operator and required reviewer

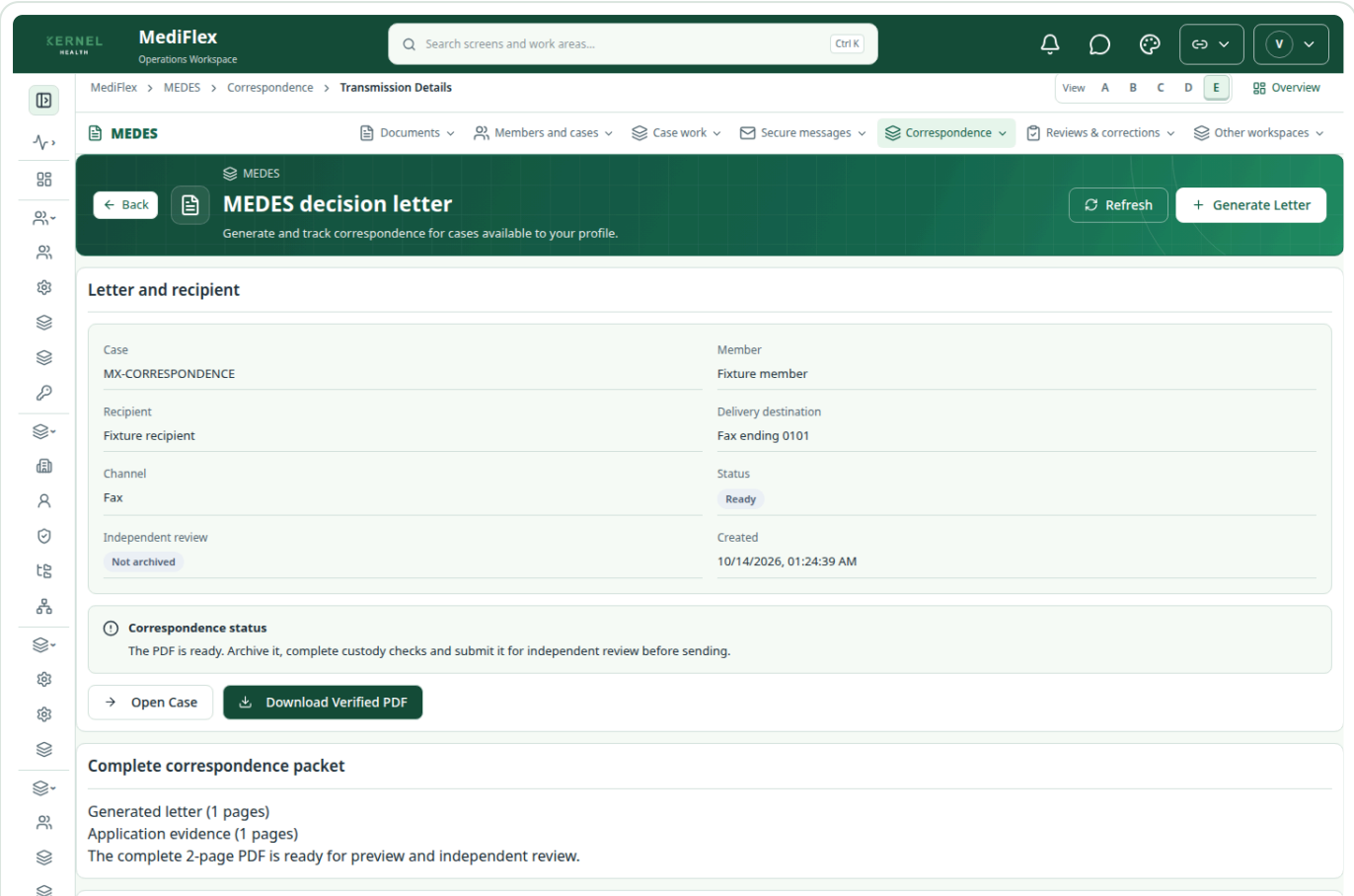
Generate accountable content for the current case and verify the packet's completeness and custody before dispatch.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Case/member / template version	The current case and eligible published Pulse content	A template draft is not publication authority.
Recipient / channel / destination	The intended controlled recipient and supported channel	Verify all destination fields before review/release.
Packet components / cover / attachments	The permitted evidence and complete generated PDF	A partial preview is not a complete ready-to-dispatch packet.
Review / archive state	The required approved and custody results	PDF Ready and Not archived explain different readiness facts.

Procedure and expected result

Step	Action	Expected visible result
1	Open correspondence from the current case and select eligible published content.	The generated narrative is tied to the intended business outcome.
2	Set channel, recipient and destination and inspect included documents.	The packet scope is explicit.
3	Generate and inspect the complete PDF/cover and attachments.	Pages and recipient details are correct.
4	Complete required review and archive/custody handoffs.	The packet satisfies the displayed release gates.
5	Reopen the packet and inspect current readiness before choosing a provider.	Generation, review and archive status are not collapsed into one success label.



SCREEN 8

Generated correspondence packet. PDF Ready and Not archived show why delivery is not yet permitted.

Illustrative application screen · select to enlarge.

When the result differs

Observation	Next action
The packet says Not archived	Complete the Custodia handoff before the permitted dispatch path.
A source/template/recipient changed after review	Obtain the required refreshed packet/review rather than releasing stale content.

Completion check

Show case/template references, full packet, independent review and archive readiness.

Continue

Choose an eligible provider connection and follow its delivery record.

Dispatch once, reconcile status and record follow-up

Open	Who acts
MEDES → approved packet → Delivery history; correspondence reply / customer follow-up	Communications operator and support worker

Separate pending configuration, test-only behavior, provider acceptance and confirmed delivery; preserve the same request when submission is uncertain.

Fields: what to enter and why

Field	Value or selection	Meaning and effect
Provider connection	An offered channel-compatible connection	Disabled/unconfigured/test mode must not be represented as live dispatch.
Queue delivery / Save pending delivery	The action matching current configuration	Pending records intent without claiming external delivery.
Delivery state / provider reference	The actual current outcome	Accepted is not Delivered; Leased/Submitting work may already be in progress.
Retry same delivery request	The supported recovery for uncertain submission	Inspect the existing request before another outbound send.
Reply channel / destination / follow-up reason	The actual supported customer response path	A follow-up task is separate from the prior provider receipt.

Procedure and expected result

Step	Action	Expected visible result
1	Verify the approved complete archived packet and destination.	The dispatch candidate satisfies its current gates.
2	Select a compatible provider and inspect whether it is Live, Test or requires setup.	The offered action matches actual provider availability.
3	Queue live delivery or save the pending/test request as appropriate.	The result describes intent/submission accurately.
4	Inspect Delivery history, provider reference and later status.	Queued, accepted and delivered outcomes are distinguishable.
5	After uncertain confirmation, use Retry same delivery request and read back the existing result.	The operator avoids an unrelated duplicate send.
6	Record the permitted correspondence reply/customer follow-up with its actual channel and reason.	The response is linked to the original business correspondence.

Detailed reference · About this guide and availability

Use this end-user guide for daily tasks. Choose a task below to open its operating procedure. The remaining chapters explain field meanings, lifecycle, approvals, exceptions and related components.

Task route	Open procedure
Open a case and receive evidence	Start this route
Request evidence from a named external partner	Start this route
Review evidence and complete case work	Start this route
Communicate, generate correspondence and follow delivery	Start this route
Monitor work and administer configuration	Start this route

Use this operating guide for MEDES: member and case context, document receipt and processing, independent reviews, case/eligibility work, secure communication, correspondence, delivery tracking, customer responses and reports.

Document control	Value
Audience	Operational users, reviewers, supervisors, correspondence teams, reporting users and authorized administrators.
Scope	All 66 original workflow entry points; 13 source role definitions (11 active in the prepared plan); 14 operational reports; seven owner-platform integrations.
Screenshots	Existing application recorded test captures with illustrative records.

Role names and the role/action matrices describe the prepared MEDES access plan, not verified current Azure grants. Use effective IAM assignments and the owner’s current policies when operating. Two profiles on one account do not create independent reviewer identities.

Follow the operating sequence

Choose the correct member/case → receive evidence → confirm custody admission → classify/index → independently review the document → complete case/eligibility work → prepare and review correspondence → track confirmed delivery → record customer follow-up. Use the task chapters and the full entry index to find the next screen.

Dependencies to confirm before use

Dependency	Required activation / confirmation	Impact
Native configuration	Effective tenant entitlement; reviewed Axis/IAM mappings; Custodia access and policies; published Regulix process/assignment configuration; published Pulse templates.	Missing menus, unavailable reviewer choices or blocked actions can be configuration outcomes.
External delivery	Live provider credential references, sender/return-address configuration and worker activation, followed by real authorized-destination acceptance.	TEST_ONLY and WAITING_CONFIGURATION are not confirmed email/fax/print-mail delivery.
Business acceptance	Real approved roles and complete permitted/denied journeys across the owner platforms.	Local/recorded test screenshots do not certify every production role or integration.

CHAPTER 10

Detailed reference · MEDES workflow and platform responsibilities

MEDES connects documents, member context, case reviews and outbound communication. Each stage preserves its own outcome. A stored file still needs content admission; an admitted document may still need independent business review; an approved letter still needs an external delivery receipt.

Main operating sequence

Order	Work	Completion evidence
1	Choose the authorized tenant/domain/profile and find the current member or exchange case.	Correct workspace and current member/case reference.
2	Upload evidence or receive a named recipient's secure upload submission.	Each file has a confirmed storage receipt.
3	Wait for Custodia security admission; begin intake; split a packet when necessary.	Accessible admitted source or admitted child documents.
4	Complete metadata, choose business context and confirm indexing.	Indexing shows Indexed against current evidence.
5	Request an independent document review using an approved reviewer grant.	Recorded Approve, Return or Reject decision against the exact version.
6	Start and complete case review, then independent eligibility review where required.	Workflow checkpoint and recorded eligibility outcome.

Order	Work	Completion evidence
7	Use secure messaging or prepare a published letter for the case.	Saved message or generated exact PDF with recipients and context.
8	Archive and independently review the full correspondence packet; queue delivery.	Approved PDF/destination followed by provider status and, ultimately, a confirmed receipt.
9	Link the confirmed response to a customer-support activity and inspect reports.	Recorded closure evidence and reports reflecting the current authorized records.

Which platform owns which part

Platform	What you use it for	Practical consequence
IAM	Sign-in, user accounts, domains, profiles, role/action permissions and independent access approval.	Seeing a page does not automatically permit its edits, decisions or document downloads.
Tenant Engine / TCP	Module entitlement, effective configuration, branding and environment bindings.	Settings and records are scoped to the selected authorized tenant context.
Axis	Shared page layouts, fields, controls, tables and action visibility.	Common header, Back, chips and record presentation are reused; configuration can affect what is shown.
Custodia	File storage, admission, viewing, metadata, document grants, retention and protected PDF operations.	A review assignment or message attachment does not grant access to a file.
Regulix	Document and case workflow, assignment, independent decisions and deadlines.	A saved request can need a workflow handoff before the next person can act.
Pulse	Published templates, generated correspondence, notification messages and delivery operations.	Creating a PDF and delivering it are distinct actions.
Vista	Role dashboards, operational reports, analytics and saved report outputs.	Reports show records permitted by the current role and data access.

Distinguish these outcomes

Message or status	What it confirms	What still needs checking
Stored	File bytes have a recorded storage receipt.	Security admission, intake, indexing and business review.
Admitted	The content passed the applicable admission checks.	Business correctness and case relevance.

Message or status	What it confirms	What still needs checking
Indexed	Metadata and business context were confirmed.	Independent review, where required.
Approved document	The assigned reviewer approved that exact evidence version.	Case and eligibility stages.
PDF Ready	A generated PDF is available.	Packet assembly, archiving, admission, indexing and fulfillment review.
Provider Accepted	The provider accepted the request.	Recipient delivery confirmation.
Delivered	The provider supplied a confirmed delivery outcome.	Recipient understanding or a business response is not implied.
Support activity Closed	A customer follow-up outcome was recorded.	The case/eligibility process has its own completion state.

CHAPTER 11

Detailed reference • Getting access, signing in and choosing a role

Before you begin

- An active MediFlex account with the organization's approved sign-in method.
- An approved domain membership and profile assignment containing the required MEDES role and actions.
- MEDES enabled for the tenant, with published screen mappings and the necessary owner-platform access.
- Access to the member/case records and any approved purpose-based Custodia document grants needed for the task.
- For outbound work, published MEDES templates and the appropriate provider connection. For review, an independent reviewer and a published workflow policy.

Sign in and select the workspace

1. Open the organization-provided MediFlex portal and complete the sign-in flow presented for your account. A registered or administrator-created account may still need activation, credential setup or approved access before MEDES appears.
2. Open the user profile menu in the application header and choose Switch profile when you need a different authorized workspace.
3. Select the correct domain and profile. Check the displayed workspace before opening any member record.
4. Use the screen search or the MEDES module navigation. Open your assigned landing workspace or one of the available work areas.

5. If the dashboard offers Dashboard role, choose only from the roles already supplied by your profile. The selector changes report context; it does not grant another role.

When a session ends, sign in again through the normal application flow. Reopen the record and verify the most recent saved outcome before resubmitting a business action. A saved draft or recorded receipt is stronger evidence than an unsaved form left open in a browser tab.

Role definitions and starting points

Role definition	Proposed landing	Intended duties
State User	MEDES dashboard	Document search, uploads, intake/splitting and secure communication; fax/case capabilities follow the approved action cells.
Case Worker	Case workload dashboard	Assigned case work, case review, current evidence and secure communication.
Eligibility Specialist	Case work queue	Independent eligibility tasks and evidence review, with the permitted upload/message actions.
Document Reviewer	Document reviewer dashboard	Independent document review, correction feedback and reviewer statistics; approved intake/indexing actions where assigned.
Support Agent	MEDES dashboard	Intake, member/case support, secure uploads, messaging and customer-response evidence.
Supervisor	Case work queue	Team assignment, escalation and independent decision work within the approved scope.
Correspondence Manager	Fax correspondence	Published letter/fax preparation, reviewed delivery operations and correspondence status.
Tenant Administrator	MEDES administration dashboard	Authorized tenant settings, assignments and reporting; separate owner-platform permissions still apply.
Security Administrator	Inactive source definition	Inactive source definition; no proposed MEDES grants or landing.
Reporting Analyst	MEDES dashboard	Authorized operational reports, saved outputs and permitted exports.
Compliance Officer / Auditor	MEDES dashboard	Authorized audit/review/report evidence; current content grants remain required.
Integration Administrator	Inactive source definition	Inactive source definition; no proposed MEDES grants or landing.

Role definition	Proposed landing	Intended duties
Platform Administrator	MEDES platform dashboard	Approved platform handoffs and support actions; the name is not a blanket access grant.

Role boundaries: The implementation has 11 active role proposals and two inactive definitions: Security Administrator and Integration Administrator. The names Platform Demo Maker, Platform Demo Checker and Reports Admin belong to the wider platform and are not interchangeable with MEDES roles. Their effective MEDES access must be explicitly approved. Administrator titles do not imply all document, message, decision or delivery rights.

Missing screens or disabled actions

1. Confirm the selected domain and profile. The same account can legitimately see different work under a different assignment.
2. Check the release version and tenant entitlement if MEDES or the work area is absent entirely.
3. If a page opens but an action is absent, check the record state, ownership, current assignment and the separate action permission.
4. If a document cannot be opened from a visible review or message, ask its owner to verify the approved Custodia grant and its expiry.
5. Give the administrator the screen name, record reference and visible error. Do not request unrestricted administrator access as a substitute for the specific required permission.

CHAPTER 12

Detailed reference · Member context and exchange cases

Task context	Details
Screen / entry	MEDES → Members and cases → Member context, or use Client Information / Related Documents where that entry is available.
Who acts	Authorized operator / eligible independent reviewer as specified below

Use Members and cases to establish the correct person and exchange before processing documents. MEDES links current member information from its authorized source. It does not use the case screen to overwrite the source member facts.

Find a member and link the current context

1. Open MEDES → Members and cases → Member context, or use Client Information / Related Documents where that entry is available.

2. Search by the member name or number. Review the returned identity, number, source and Updated timestamp.
3. Open the member. If Link member is available, enter a meaningful Reason and confirm Link member.
4. Verify Member reference updated. The member reference can now be selected by document upload/indexing when your current permissions allow it.
5. If you are authorized to create a case, choose Start case from this member or New case from Exchange cases.

Create an exchange case

1. Open Exchange cases and choose New case.
2. Use Find member to search the authorized member source. Select the correct person by name and member number.
3. Choose Priority: Low, Normal, High or Urgent. Enter the required Reason for starting the exchange.
4. Choose Create case. If confirmation is interrupted, use Retry same action.
5. Open the resulting case and check its number, member, priority and status. Retain the case number as the reference for document and communication work.

Field	Source / purpose	What to check
Member / Member number	Current authorized member source, used to identify the person.	Match both before creating the case.
Member information updated	Timestamp of the member reference used by MEDES.	A changed source reference must be refreshed before further work.
Priority	Your selected business urgency for a new case.	Choose an accurate value; urgency does not bypass reviews.
Reason	Your explanation, recorded with the operation.	Describe why this case or linkage is needed; maximum 2,000 characters.
Case number / Status	Assigned or maintained by the case workflow.	Use the number for navigation; follow the state's available actions.

Continue work from a case

- Show documents expands the member's documents that you are permitted to read. Open the appropriate document; unrelated or restricted records are not made available by the expansion.
- View messages and Send message carry the case/member context into secure messaging.
- Respond to customer opens an activity that tracks follow-up and confirmed response evidence.
- Open case review leads to the case task or to Start case review if no current review has been started.
- When Member information changed appears, return to Member context and refresh/link the current reference. Dependent actions remain blocked until the source is current.

Existing case search: Search Exchange cases by the available case/member criteria before creating another case. If a record is missing, first check your domain, profile and member access. Creating a duplicate does not resolve a permission problem.

SCREEN 2

Create an exchange case for the selected current member.

Illustrative application screen · select to enlarge.

Expected result: The case has a saved number, the correct current member reference, priority and state.

CHAPTER 13

Detailed reference · Find, upload and inspect documents

Task context	Details
Screen / entry	MEDES → Documents → Documents / Search Documents.
Who acts	Authorized operator / eligible independent reviewer as specified below

Search existing evidence

1. Open MEDES → Documents → Documents / Search Documents.
2. Enter Document name or file name. Set Document access to All my accessible documents, My uploads or Assigned to me.
3. Narrow Business review and the Received from / Received through date range as needed, then run the search.
4. Open the document row. Check its title, Access, Business review, version and security admission before using its content.
5. Select the available tab: Details, View document, Metadata or History. Owned documents may also show Processing, Security, Retention and Storage.

The search is scoped to your accessible documents, including your uploads and assigned reviews. It is not an unrestricted search of every repository object. Some original entries such as Search Results, Document Viewer, View Metadata and Document History open the same document workspace at a different tab.

Upload files

1. Open Upload documents. In Select Files, choose files or drag them into the upload area.
2. Remove unwanted files before continuing. Confirm the selected files and choose Continue.
3. In Enter Details, select the approved content class/type and review the title for each document. The selected class can restrict size and formats further.
4. Set Related to to Existing business context or No direct link. For an existing context, use Search contexts, select Business context and verify the selected reference.
5. Enter the Received date and optional Description. The date must be valid and not in the future. These business details apply to every file in the batch.
6. Choose Continue to review the files and their shared business details. Return with Back if they are wrong.
7. Choose Upload [number] Files. The queue stores one file at a time and reports the result per file.
8. If necessary, choose Pause Queue; it pauses after the current file. Use Retry Remaining Files for unconfirmed/failed files in the same dialog.
9. Choose Done or View uploads and verify each stored record. A successful upload begins Custodia screening; continue only when the relevant content is admitted.

Input or limit	Current candidate behavior
Formats	PDF, DOCX, DOC, PNG, JPEG, TIFF, text and ZIP, subject to the approved content class. Upload acceptance does not guarantee every format can be previewed or split.
File size	1 byte to 25 MiB per file; the approved class may impose a lower maximum.
Batch size	Up to 20 files and 100 MiB in total. A secure-upload request can impose a lower file count.

Input or limit	Current candidate behavior
Filename / title	Filename up to 180 characters; no path separators or control characters. Document title up to 200 characters.
Received date	The date evidence was received; future dates are rejected.
Description	Optional, up to 500 characters. Applies to the batch.
Business context	A current existing reference available to the selected profile. A case-linked upload keeps the case context fixed.

Follow upload results

Upload state	Meaning	Next action
PREPARED	The upload request exists but storage has not been confirmed.	Resume/retry the saved upload request.
UPLOAD_FAILED	The storage step did not complete.	Read the error and retry the remaining file in the existing dialog.
STORED	Storage has a confirmed receipt.	Check security screening, then begin intake.
QUARANTINED	Content is waiting for admission or requires attention.	Inspect the custody result; ask the content administrator if it does not progress.
ADMITTED	Content is available for the permitted next operations.	Proceed to intake/indexing and independent review as required.

Metadata, viewing and history

Metadata fields come from the approved Custodia schema for the selected content class. Their labels and required values can differ by document type. Complete the fields shown rather than inventing an unrelated value. Editing requires separate permission and an editable version.

After a document version has been submitted for review, its metadata can be locked to preserve the reviewed evidence. Correct that evidence using a replacement upload and a linked new review. History identifies recorded events and sources; a document's business history and file security history describe different parts of its lifecycle.

Viewing, downloading and printing follow the current document grant. A review preview does not imply download/print permission. If content access is unavailable, ask the owner to check the exact version, purpose and grant expiry instead of copying the file through another channel.

Expected result: The authorized document list and selected document show the intended member/case, version, access, admission and business-review state.

Detailed reference · Intake, PDF splitting and classification

Task context	Details
Screen / entry	MEDES → Documents → Document Intake Queue
Who acts	Authorized operator / eligible independent reviewer as specified below

Triage a received document

1. Open MEDES → Documents → Document Intake Queue. Search by Document name or file name and Intake status, then choose Search intake.
2. Open a New record, inspect its document and select Begin intake. Enter Decision reason and choose Save intake decision.
3. Inspect all of the available source content. For one complete document choose Confirm single document. For a packet containing multiple documents choose Mark for splitting.
4. Enter the reason for the selected decision and save it. Reject intake is available for the allowed nonterminal intake states when evidence cannot be processed.
5. For Ready for indexing, choose Classify and index. For Needs splitting, choose Split document packet.

Current intake state	Permitted path shown by the workflow
New	Begin intake → Intake in progress; or Reject intake with a reason.
Intake in progress	Confirm single document → Ready for indexing; Mark for splitting → Needs splitting; or Reject intake.
Needs splitting	Complete a verified split; or Reject intake while permitted.
Split into documents	The original packet is preserved. Process each admitted child document.
Ready for indexing	Complete metadata and context in Classify and index.
Rejected	Read the recorded reason and follow the replacement process; the prior record remains in history.

Split a PDF packet

1. Open a permitted, unreviewed PDF packet marked Needs splitting. Select Split document packet.
2. Open the viewer and verify the actual page count. The split form uses that confirmed count.
3. Enter New document title and Include pages [start] through [end] for the first child, then choose Add document.
4. Repeat in page order. Every page must belong to exactly one contiguous group. Use Edit last document to correct the latest group.
5. Verify that all pages are assigned to at least two documents. Enter Split reason.

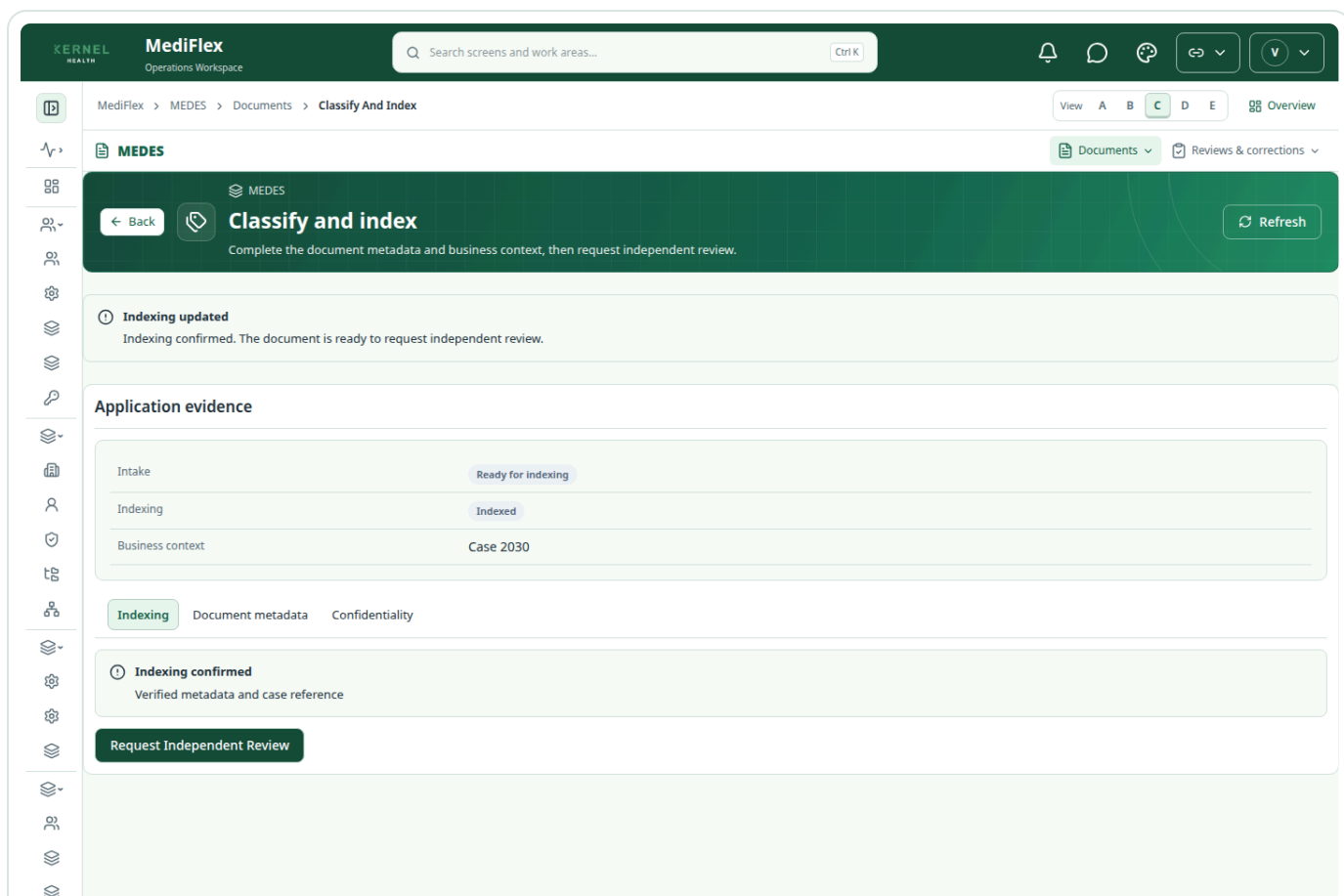
6. Choose Create documents from pages. If interrupted, choose Retry saved split to preserve the same groups and child identities.
7. Review the child records and their custody state. When a child is admitted and accessible, open its intake and continue indexing. Keep the original packet for traceability.

PDF limits and preparation: The split contract supports 2–200 source pages and 2–40 child groups, with a title of up to 200 characters per child. Signed, interactive, annotated or protected/redacted sources need an appropriately approved flattened source before splitting. The application blocks operations that would lose protected overlays. Obtain that source through the document owner; do not discard security markings.

Classify and confirm indexing

1. Open Classify and index from the intake record. Confirm the intake is Ready for indexing.
2. Open Document metadata and complete the current approved schema. The required document type, category, source channel and other class-specific values must be present.
3. Inspect Confidentiality. It reflects Custodia classification and current permissions; this tab is not a way to weaken the content policy.
4. Return to Indexing. Search and choose the current Business context, then enter Indexing reason.
5. Choose Confirm indexing. Verify Indexing confirmed / Indexed before requesting review.
6. Choose Request independent review when available. If metadata or context changes later, review the current values and confirm indexing again when Needs rechecking is shown.

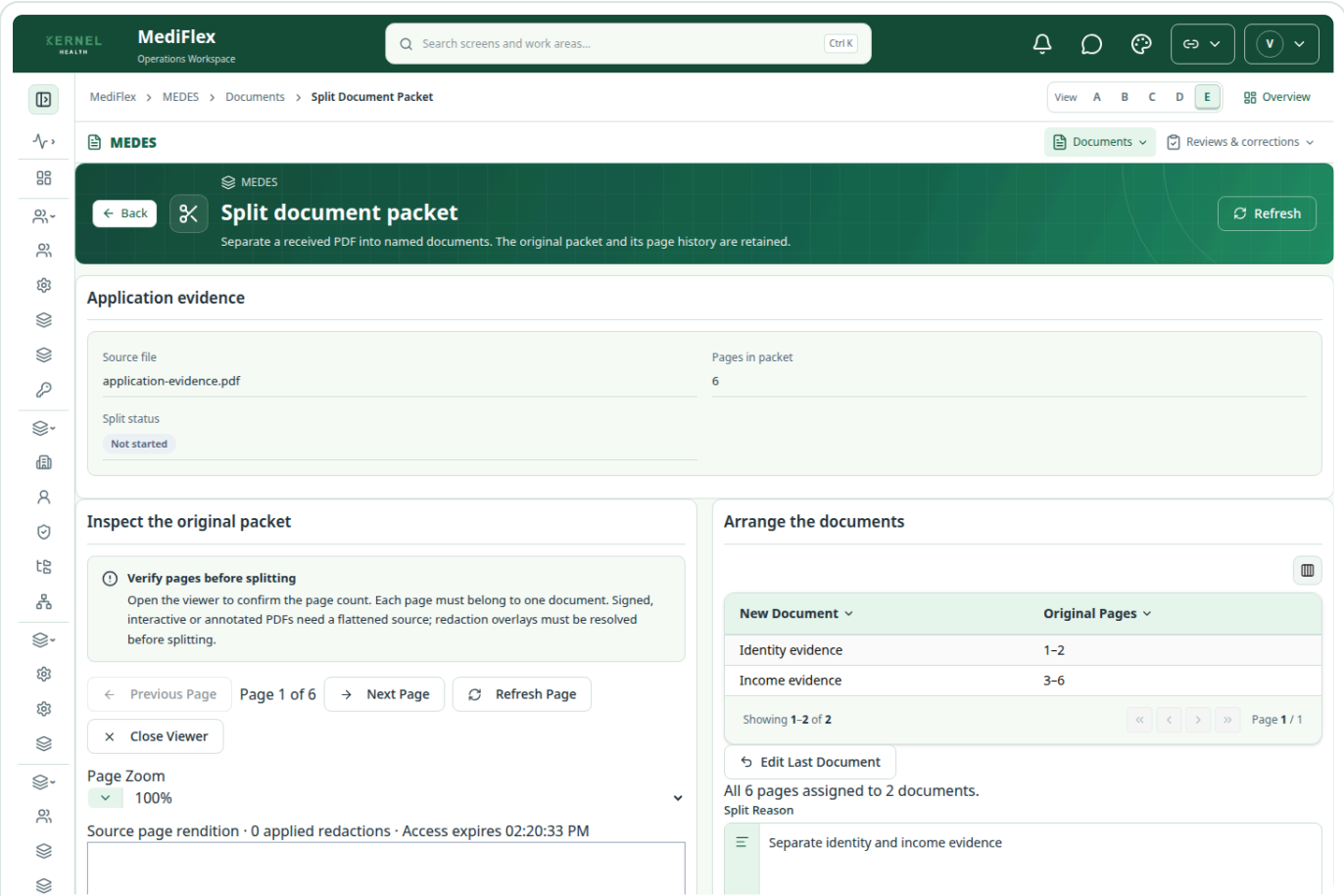
Indexing state	Meaning	Resolution
Needs metadata / NOT_READY	Required schema or values are missing.	Complete metadata; an administrator must publish a missing schema.
Ready to confirm / READY	Evidence can be checked for indexing.	Confirm the current business context and reason.
Indexed / INDEXED	The metadata/context evidence was confirmed.	Request review when the custody grant and workflow are ready.
Needs rechecking / STALE	Metadata or linked context changed.	Inspect the new values and reconfirm; do not rely on the old confirmation.



SCREEN 3

Indexed document ready to request independent review. The sample uses an existing case reference.

Illustrative application screen · select to enlarge.



SCREEN 4

Split plan: named child documents and the original PDF page ranges.

Illustrative application screen · select to enlarge.

Expected result: The original and any split child documents remain linked; indexing and the independent-review stage are visible.

CHAPTER 15

Detailed reference · Request and receive secure partner uploads

Task context	Details
Screen / entry	MEDES → Documents → Secure Upload Workspace and choose Request documents.
Who acts	Authorized operator / eligible independent reviewer as specified below

Secure upload is a named-recipient workflow. The recipient signs in with an eligible active account and authorized profile. Copying a request link does not make it an anonymous upload link or grant another person access.

Receiving team: create a request

1. Open MEDES → Documents → Secure Upload Workspace and choose Request documents.
2. Use Find recipient to search active accounts with approved secure-upload access. Choose the intended Recipient.
3. Set Maximum files between 1 and 20 and Expires in hours between 1 and 168.
4. Enter Requested documents and reason, explaining the required evidence clearly. Create the request.
5. Open the saved request. Use Copy link to share its recipient-bound link through an authorized channel. Notifications depend on the published Pulse setup.
6. Track the request and submitted files. Do not treat a copied link or notification as proof of submission.

Named recipient: upload and submit

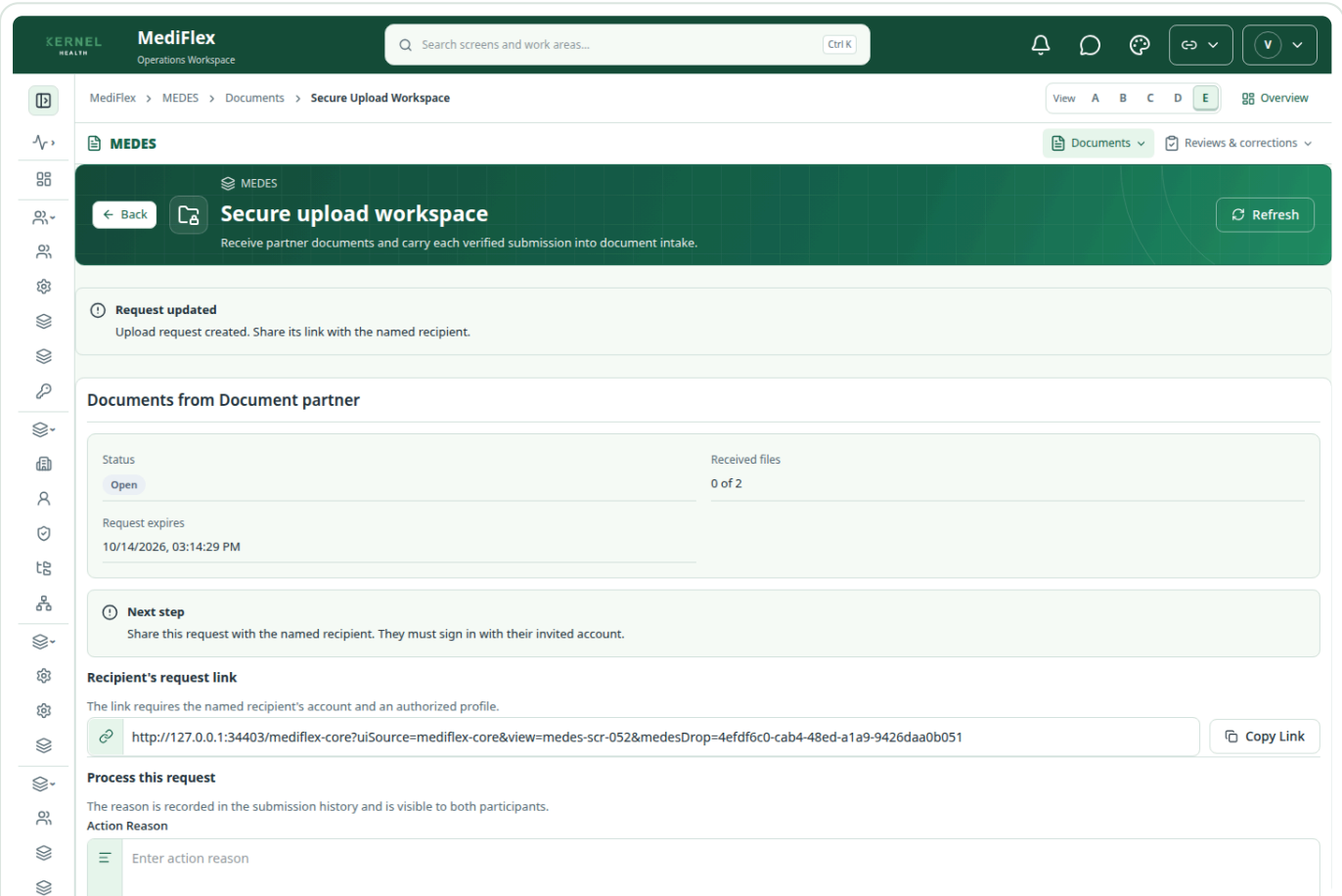
1. Open the request link and sign in using the named recipient's account and an authorized profile.
2. Read the requested evidence, maximum file count and expiry.
3. Choose Upload files and complete the upload wizard. The files remain attached to this request; the receiving team assigns the business context during indexing.
4. Return to the request and verify the uploaded files. Enter Action reason and choose Submit documents when the submission is complete.
5. Verify Submitted. Refresh later to see the receiving team's progress. Uploading files alone does not submit the completed file set.

Receiving team: accept into intake

1. Open a Submitted request and inspect each file's security state.
2. When all files have passed screening and are available to your profile, enter Action reason and choose Begin intake.
3. Verify Accepted, then open each available file's intake. Perform triage, splitting if needed, indexing and independent review.
4. If the submission is unusable, use Reject submission with an explanation. A rejected/expired request requires a new request for corrected files.
5. Use Close request where permitted when no further upload should be accepted. The request history remains visible to its participants.

State	What the user should do
OPEN	Recipient uploads the requested files and submits the completed file set.

State	What the user should do
SUBMITTED	Receiving team waits for complete admission and begins intake.
ACCEPTED	Receiving team completes intake/indexing of the files. This is not case or eligibility approval.
REJECTED	Read the recorded reason; request a new submission link for corrections.
REVOKED	The receiving team closed the request. No further upload is accepted.
EXPIRED	Ask the receiving team for a new request.



SCREEN 5

Named-recipient secure upload request. The pictured localhost link is a recorded test example; use the link created in your own environment.

Illustrative application screen · select to enlarge.

Expected result: The request is addressed to the intended eligible recipient with its expiry and purpose. Any accepted upload is linked to its request and case; missing or expired access remains blocked.

Detailed reference · Independent document review and corrections

Task context	Details
Screen / entry	Document reviews → Requested by me to track the submission
Who acts	Authorized operator / eligible independent reviewer as specified below

A document review applies to an exact admitted version. It requires an eligible independent reviewer, an approved Custodia preview grant with an appropriate purpose, and the published Regulix review configuration. The assignment itself does not supply document access.

Request review as the document owner

1. Complete intake and indexing. Open the upload, indexed document or correspondence archive that is ready for review.
2. Choose Request independent review. Select Reviewer and approved purpose from the available grant choices.
3. Enter Review reason, up to 2,000 characters, stating what the reviewer should assess.
4. Choose Submit for review. If confirmation is interrupted, use Retry review request.
5. Open Document reviews → Requested by me to track the submission. If it shows a saved handoff, choose Resume review submission rather than submitting a duplicate review.

No eligible reviewer grant: Ask the document owner or Custodia administrator to establish the correct approved preview grant for a different reviewer and the exact admitted version. Then choose Refresh reviewers. A role name or task assignment alone is insufficient.

Review as the independent reviewer

1. Open Document reviews, set Reviews to Assigned to me and select Open reviews. A notification may open the same exact review.
2. Open the review and inspect its reason, due time, document identity and current access.
3. View the document through the available preview. For correspondence, also inspect the case, recipient, delivery channel and destination alongside the complete PDF.
4. Select Decision: Approve document / Approve correspondence delivery, Return for correction, or Reject document.
5. Enter Decision comments explaining the outcome. Choose Confirm decision.
6. Verify the recorded review state and comments. If the decision was saved but confirmation failed, use Resume decision.

Outcome	Meaning	Owner's next step
APPROVED	Independent review approved the exact evidence/version and, for a letter, the exact fulfillment information.	Continue the permitted business workflow or delivery preparation.
RETURNED	Corrections are required.	Read the comments; provide a new linked replacement or corrected correspondence draft.
REJECTED	The reviewer rejected the submitted evidence.	Read the reason and follow the authorized business resolution. Do not rewrite the original decision.
AWAITING_START	The request exists, but its workflow handoff is not confirmed.	Resume the existing submission with the permitted owner action.
IN_REVIEW	An active independent review is in progress.	The assigned eligible reviewer completes it.

Replace a returned document

1. Open Requested by me → Awaiting correction, or use the Corrections and returned reviews entry.
2. Read the decision comments before changing anything.
3. Choose Upload replacement and upload corrected evidence in the same business context. Complete its required admission/intake/indexing steps.
4. Return to the original returned review and choose Submit replacement for review.
5. Choose a new admitted upload without an existing review, select its eligible reviewer/purpose, and submit with a reason.
6. Check the new review and its link to the previous review. The old file and decision remain in history.

Correct a returned generated letter

For a correspondence review, choose Open letter for correction. In the letter, select Prepare corrected letter. This creates a separate draft linked to the prior review. Correct it, save it, generate a new PDF and repeat packet preparation, archiving and independent review. Approval of the old PDF does not approve the replacement.

If the review period has ended or document access was revoked, contact the document owner. If the current profile has no permitted decision, switch to the correctly assigned reviewer profile; do not attempt self-approval. Document review history is accessed through the review queue's completed/all filters and the linked review records.

Expected result: The decision references the intended saved document/version; a returned item remains available for correction.

Detailed reference · Case work, assignments and eligibility decisions

Task context	Details
Screen / entry	the correct exchange case and confirm that the member reference is current.
Who acts	Authorized operator / eligible independent reviewer as specified below

The case workflow carries reviewed evidence into case review and then eligibility review. The eligibility stage uses an independent eligible worker; completing an earlier stage does not authorize the same person to approve the next independent stage.

Start case review

1. Open the correct exchange case and confirm that the member reference is current.
2. Complete the required document reviews first. Choose Open case review.
3. If the case has no current review, enter Review reason and choose Start case review.
4. Verify that the workflow handoff has completed and the case work record opens. If interrupted, use Retry saved start.
5. Read Review stage, Task status, Assigned to, Priority, Due and Editing before deciding what to do.

Find and claim work

1. Open MEDES → Case work → Work Queue.
2. Choose Queue: My work or Available to claim. Supervisors with the appropriate permission can use All authorized work.
3. Optionally filter Find work, Review stage and Task status; choose Apply filters.
4. Open the task. Check the case/member and the current stage.
5. Choose Claim when offered, enter Action reason and confirm. Verify your assignment before performing the review.
6. Use Open case and documents to inspect the supporting case and evidence.

Choose the correct task action

Action	Use and expected result
Claim	Take an available task that the current profile is eligible to own.
Release	Give up the current assignment so another eligible worker can take it.
Hold	Pause current work with a reason; the task shows On hold.

Action	Use and expected result
Resume	Continue work after the reason for its pause has been resolved.
Request information	Record that more information is needed. Use a secure message or customer-support activity for the follow-up; this action is not itself a completed customer response.
Escalate	Record the reason the task requires supervisor attention.
Reassign	An authorized supervisor chooses an eligible assignee and records a reason. Eligibility and current member access are checked.
Lock / Unlock	An authorized supervisor controls editing of the current work item. Unlocking does not grant additional business permissions.
Complete case review	Record completion of the case stage and advance to eligibility review when its workflow conditions are met.
Record eligibility decision	Complete the independent eligibility stage using an outcome, effective date, evidence checklist and reason.
Cancel interrupted action	Authorized recovery of a pending action where offered. Inspect the saved request and history before using it.

Only actions allowed by your role, assignment and the current record state appear. Most task actions require a reason of up to 2,000 characters. The task history preserves the action, reason and recorded time.

Record an eligibility decision

1. As the independently eligible reviewer, open an available Eligibility review task and claim it if required.
2. Inspect the case, current member context and reviewed documents. Verify that the earlier case-review stage has completed.
3. Choose Record eligibility decision.
4. Select Eligibility outcome: Approved or Denied. Enter the required Effective date.
5. Complete the Evidence reviewed checklist: Identity, Residency, Citizenship, Income and Medical records. Check each only after carrying out the applicable review.
6. Enter Decision reason and confirm Record eligibility decision.
7. Verify the final Eligibility decision panel, recorded outcome/date/reason and completed workflow checkpoint. The result is a MEDES decision; it does not overwrite member-source facts.

Recover interrupted work

Saved action awaiting confirmation means that the application has retained a specific request. Use Retry saved action, or Refresh task to inspect its current result. Repeatedly creating new requests can obscure which outcome is current. If the task is locked or no longer assigned to you, ask the supervisor to resolve the assignment. No due date set means a deadline was not recorded; it does not mean that a service-level target was met.

SCREEN 6

Eligibility task with outcome, effective date, evidence checklist and decision reason. The implementation requires the applicable form checks before confirmation.

Illustrative application screen · select to enlarge.

Expected result: The assigned task records the permitted outcome and supporting evidence against the correct case.

CHAPTER 18

Detailed reference · Secure messages and partner mailbox

Task context	Details
Screen / entry	MEDES → Secure messages → Inbox / Secure Messages.
Who acts	Authorized operator / eligible independent reviewer as specified below

Secure messages are application conversations. Email notifications can alert a recipient, but the message is read inside the authorized workspace. Messages can link to a document, member, case or task without changing access to that underlying record.

Read and organize messages

1. Open MEDES → Secure messages → Inbox / Secure Messages.
2. Choose the appropriate folder: Inbox, Sent, Drafts, Archived or Trash where available.
3. Use Find messages to search the subject, message or sender. Additional filters include sender, priority, read/responded status, attachments, read-receipt request, recent period and sort order.
4. Open the conversation and read its sender, recipients, content and linked context.
5. Open a linked case or document only through an available action. A restricted attachment requires a current owner grant.
6. Use Mark as read / Mark as unread, archive, trash or restore actions as permitted. Folder organization affects your mailbox; it does not erase the shared audit record.

Compose a secure message

1. Choose Compose message / Send message, or start from a document or case so the relevant context is already linked.
2. Add To recipients. You may also add CC recipients. Search Recipient type as People, Role audience or Workgroups.
3. Select only the intended current audience. The recipient list records the resolved audience at send time; it is not a permanent grant to anyone who later joins a role.
4. If needed, use Choose related record to select Case, Member or My task. Recipients must have the applicable current member access for a linked conversation.
5. Enter Subject, Priority and Message. Enable Request read receipts if required.
6. Use Choose documents to attach permitted admitted documents. Review the complete recipient and attachment list.
7. Choose Save draft to pause privately, or Send message to record the message and recipients.
8. Verify the sent conversation. If confirmation is interrupted, use Retry saved action. Check the Sent folder before creating another message.

Field / limit	Significance
To / CC	Up to 20 selected recipient entries. Choose People, Role audience or Workgroups from the eligible directory results.
Subject	Required for a new message; up to 200 characters.
Message	Required text; up to 10,000 characters.
Documents	Up to 10 linked documents. Existing custody/access rules continue to apply.
Priority	Helps recipients prioritize the conversation; it does not change authorization.
Read receipts	Requests a recorded read indication; it is not a case decision or evidence of external email receipt.

Field / limit	Significance
Related record	The selected case/member/task context. Remove it before sending only when the message should be independent of that context.

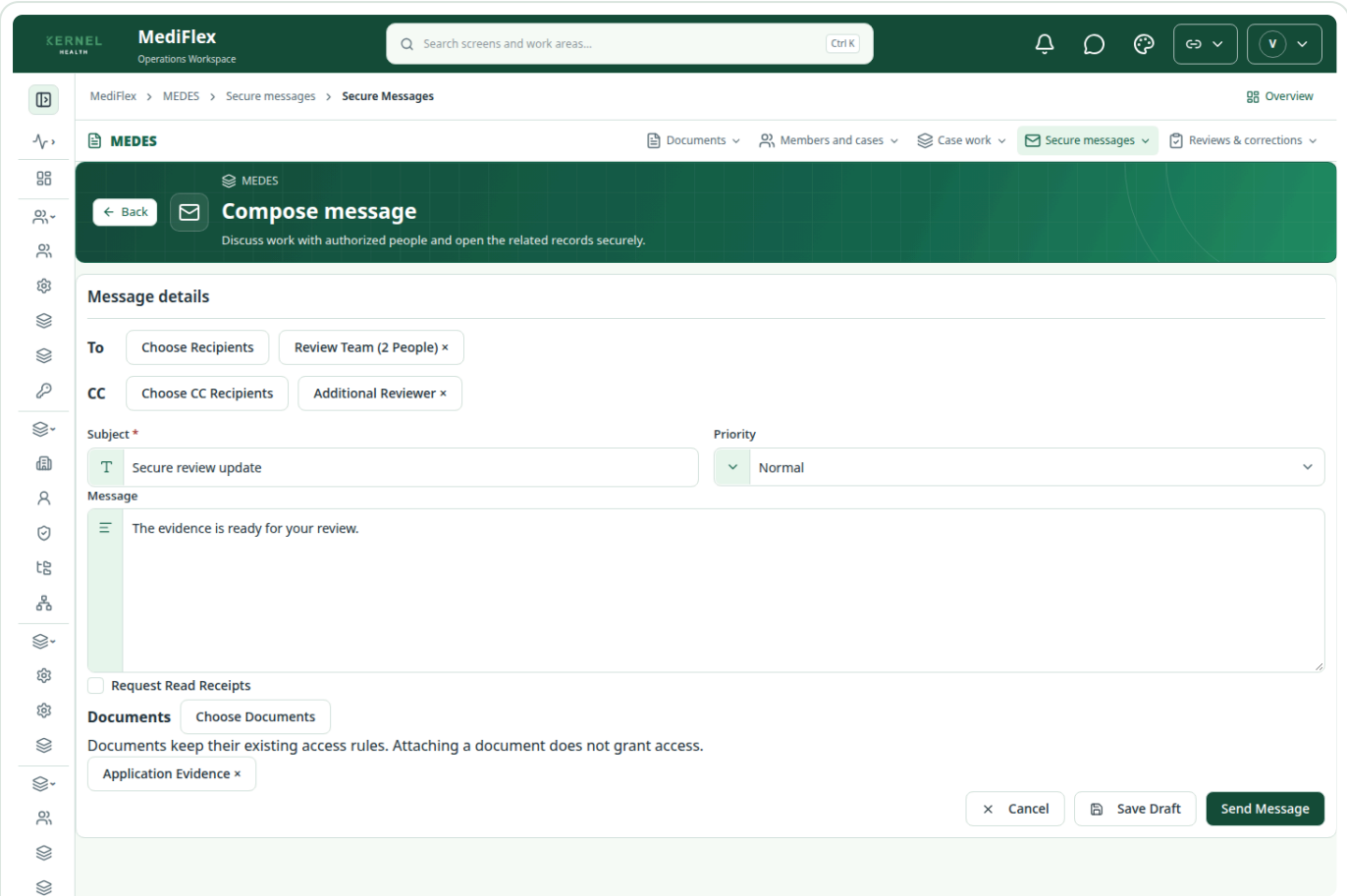
Reply, reply all and forward

Command	Audience and behavior
Reply to [sender]	Responds to the sender of the selected message.
Reply all	Uses the selected message's sender and recipients. Participants in other private replies are excluded.
Forward	Copies the selected message into a new conversation. Choose documents separately when needed and recheck the authorized user.
Save / edit draft	Stores a private draft that can be opened from Drafts. A saved draft has not been sent.
Discard draft	Removes the unsent saved draft through the permitted action.

Partner mailbox and sender permissions

Partner Mailbox uses the secure-message workspace with an additional tenant entitlement. It is not a general public partner portal. If it is unavailable, the administrator must check both the module feature entitlement and the profile's message permissions.

The proposed sender role set is State User, Case Worker, Eligibility Specialist, Document Reviewer, Support Agent and Supervisor. The other MEDES role definitions are not automatically secure-message senders. Letter-generation and external-delivery permissions are separate from this secure-message sender rule.



SCREEN 7

Compose a secure message with recipients, document references and optional read receipts.

Illustrative application screen · select to enlarge.

Expected result: The saved or sent message has the intended case context, resolved permitted recipients and authorized document links. A draft is not counted as sent; sending is not a recipient acknowledgment.

CHAPTER 19

Detailed reference · Templates, fax covers and letter preparation

Task context	Details
Screen / entry	MEDES → Correspondence → Published correspondence templates for the published MEDES generation choices.
Who acts	Authorized operator / eligible independent reviewer as specified below

Correspondence is tied to an authorized case and current member reference. The document is generated from a reviewed, published MEDES Pulse template. Its recipient, channel, exact PDF and any attachments must complete the required review before external delivery.

Find templates and existing correspondence

1. Open MEDES → Correspondence → Published correspondence templates for the published MEDES generation choices.
2. For authoring or governance, use MEDES settings → Communications to open Pulse Letter templates, Email templates or the relevant review workspace if your profile has access.
3. Use On-demand correspondence or Fax correspondence to locate existing work by case, recipient or letter name.
4. Open a letter to inspect Letter and recipient, generated PDF state, Independent review and Delivery history.
5. Use Pending correspondence for items without confirmed completion and Transmission details for the exact delivery record.

Which template is needed?: A Pulse letter template produces the business PDF. A Pulse email notification template produces an alert and its action link. A Vista report template produces a report output. These are different catalogs. MEDES generation lists only eligible published MEDES letter templates; a draft or another module's template is not a generation choice.

Create a letter or fax cover

1. Open Generate a letter or Create fax cover, or choose Generate letter from correspondence.
2. Use Find a case, choose the correct authorized case and verify its member. A stale member reference must be refreshed first.
3. Select Published letter template and check its current published version.
4. Choose Delivery channel: Fax, Email or Print and mail. The dedicated fax-cover view keeps Fax selected.
5. Enter Recipient name and the destination fields appropriate to the channel. Check the address printed on the letter as well as the electronic destination.
6. For fax, complete the cover fields and notification preferences described below.
7. Optionally choose case-document attachments and put them in the intended order.
8. Choose Save draft if incomplete. When all required inputs are correct, choose Generate PDF.
9. Wait for the generated PDF to become Ready. Use Refresh to check its progress, then Download verified PDF if your action permissions permit it.

Channel	Required destination information	Validation / practical check
Fax	Recipient name, US fax number and address printed on the letter.	Use +1 followed by the 10-digit number, for example +15125550101. Verify the actual recipient; the example is not a delivery destination.
Email	Recipient name, recipient email and address printed on the letter.	Use the intended authorized mailbox. A generated PDF is not automatically emailed.
Print and mail	Recipient name, street address, city, two-letter US state and ZIP code.	The implementation uses US postal addresses; ZIP supports five digits or ZIP+4. Verify the physical address and return-address configuration.

Fax cover field reference

Field	Meaning
Subject / reference	Required cover subject, up to 200 characters. Use a meaningful business reference.
Department / Attention to	Optional routing information for the receiving organization, up to 200 characters each.
Cover comments	Optional cover instructions, up to 2,000 characters.
Priority	Normal, High or Urgent.
Confidentiality	Standard, Sensitive or Restricted; review this together with the applicable document policy.
Include confidentiality notice	Controls inclusion of the cover notice. It does not replace content-access controls.
Notify me on delivery / failure	Records your delivery-notification preferences; approved Pulse notification setup is required.
Sender	Taken from the current account rather than arbitrary typed sender identity.

Cover text and correspondence reply text do not accept template-token braces. Enter the final business text; template authoring and placeholder configuration belong in the published Pulse template.

Save, reopen and discard a draft

1. Choose Save draft after selecting a case and entering the available details.
2. Open My drafts in the correspondence workspace to find the saved private draft.
3. Open Edit draft and verify the case, template, destination and attachments. Save changes before generating a PDF from an already-saved draft.
4. Choose Generate PDF only after the edited draft is saved. The generated item is a separate durable result.

5. If the unsent draft is no longer needed, choose Discard draft and Confirm discard. This does not send a letter. Keep draft cancels the discard.

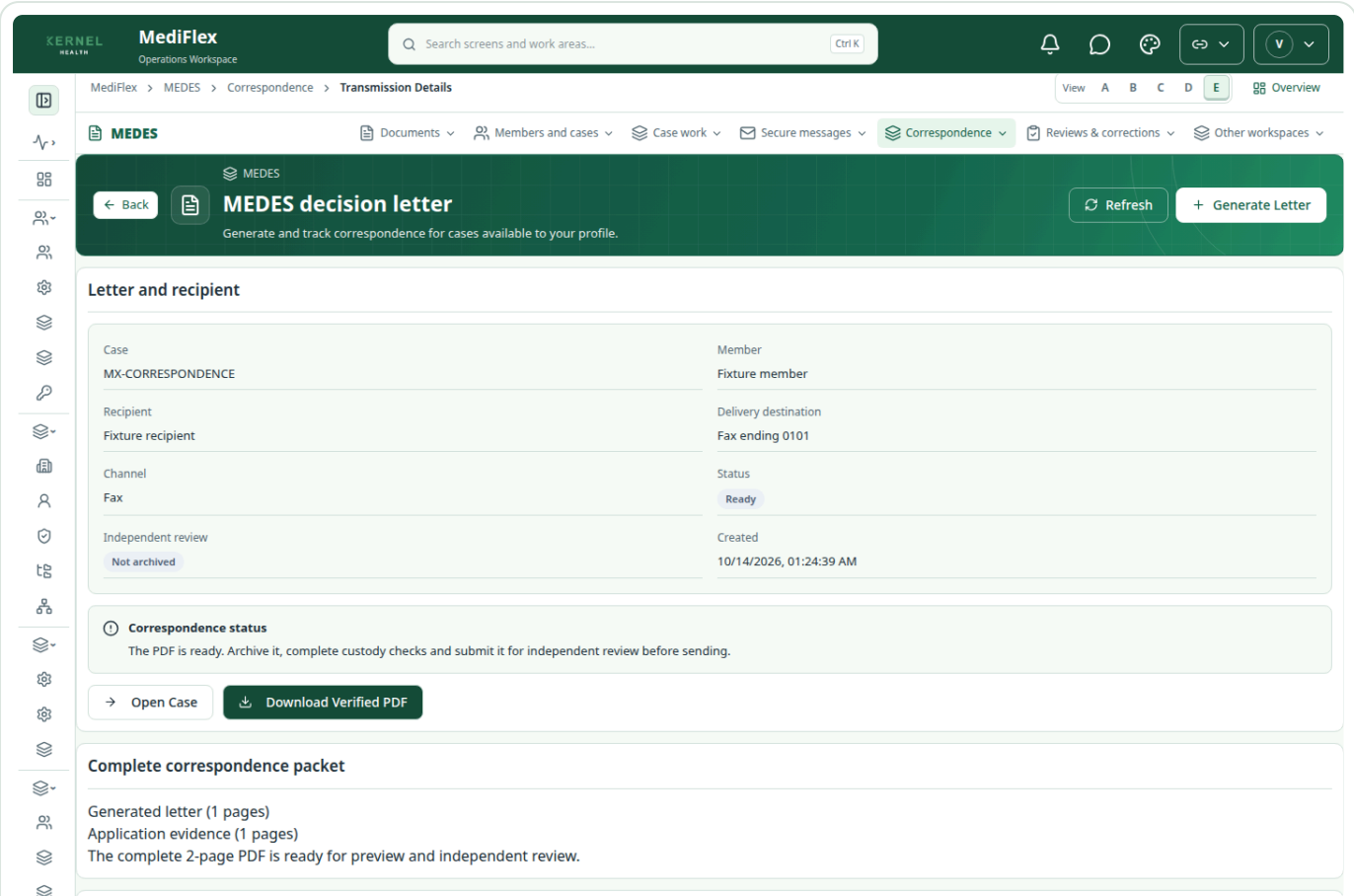
Assemble an attachment packet

1. In Case document attachments choose up to 10 admitted, accessible PDF documents from the case.
2. Use Up, Down and Remove to set the order. The generated letter comes first, followed by the selected documents.
3. Generate the letter and wait for its PDF. When prompted, choose Assemble packet.
4. Verify the complete packet page count and inspect its PDF before requesting review.
5. If assembly was interrupted, choose Retry packet assembly. If an attachment version or access changed, refresh access or prepare a new letter with current documents.

Packet assembly preserves the original source versions. Encrypted, signed, interactive or annotated PDFs require an appropriately approved flattened copy. The exact selected versions must remain available through preparation, review and delivery. Do not treat the unassembled letter as approval of the complete packet.

Archive and independently approve the exact PDF

1. In Document archive select an approved PDF Content class and enter Document title.
2. Choose Archive generated PDF. If a prepared archive is pending, use Retry same archive request.
3. Verify PDF stored and the custody state. Choose Open document intake to complete the required intake, metadata and indexing.
4. When the archive is Admitted and Indexed, choose Request independent review.
5. Select the approved reviewer/purpose, enter the reason and submit. The independent reviewer checks the exact complete PDF, recipient, case, channel and destination.
6. After approval, return to the letter and verify Ready for delivery. Only then select the provider connection and queue external delivery.
7. If returned, use Prepare corrected letter and create a new reviewed version linked to the original review.



SCREEN 8

Generated correspondence packet. PDF Ready and Not archived show why delivery is not yet permitted.

Illustrative application screen · select to enlarge.

Expected result: The exact generated document, recipient and channel are inspected; required case-specific review remains separate from template publication.

CHAPTER 20

Detailed reference · Queue, track and recover external delivery

Task context	Details
Screen / entry	the approved letter and verify its current recipient, destination, complete PDF and review outcome.
Who acts	Authorized operator / eligible independent reviewer as specified below

Select a connection and submit once

1. Open the approved letter and verify its current recipient, destination, complete PDF and review outcome.

2. Select Provider connection. The choices are limited to the letter's channel and show whether setup is required, disabled, Test mode or Live.
3. For a configured enabled live connection choose Queue delivery. For a test/unconfigured connection, Save pending delivery records the request without claiming live dispatch.
4. Open Delivery history and note the current status and provider reference.
5. Use Refresh to inspect later changes. Background provider checks are designed for five-minute intervals; repeated manual refresh does not make the provider deliver faster.
6. If submission confirmation fails, use Retry same delivery request. Check the existing record before creating any new outbound request.

Delivery status dictionary

State	Meaning	Action / owner
WAITING_CONFIGURATION	A connection lacks required setup or is disabled.	Communications administrator configures it; operator then releases the approved pending request.
TEST_ONLY	The selected connection is in test mode.	No external delivery has occurred. Use an approved live setup for actual dispatch.
QUEUED	A delivery request is waiting for processing.	Monitor history; cancellation may be available before external submission.
LEASED	The worker has claimed the delivery request.	Wait for the recorded processing result; do not create another send.
SUBMITTING	An external submission is in progress.	Inspect the eventual provider result.
ACCEPTED	The provider accepted the request.	Await confirmed delivery; accepted is not delivered.
DELIVERED	The provider confirmed delivery.	Inspect the receipt/history; use it as delivery evidence where appropriate.
FAILED	Rendering or delivery needs attention.	Read the specific error. Correct the source/configuration before another authorized attempt.
UNKNOWN	The provider's response was not confirmed.	Reconcile with the provider's actual record before sending again. Escalate to delivery operations.
NEEDS_REVIEW	Connection settings changed after queuing.	Review the connection and release only after the required checks.
CANCELLED	The pending request was cancelled.	Inspect the recorded cancellation; no completion should be inferred.

Release and cancel pending delivery

When provider setup has been completed and the exact letter remains approved, use Release after provider setup if offered. The current access and provider configuration are checked again. Use Cancel pending delivery only while the application permits it. It is not a recall of an already-submitted fax, email or physical letter.

For UNKNOWN, do not work around the warning by generating a duplicate letter. Give delivery operations the correspondence reference, provider reference if present, channel and recorded time. They must determine whether the first submission exists at the provider.

Where to monitor each channel

Work area	Use
Transmission log / Transmission details	Inspect the recorded status and history of the exact correspondence delivery.
Fax correspondence / Fax recipient status	Follow fax work and recipient destinations.
Print and mail tracking	Inspect the print/mail request and the latest provider-confirmed status.
On-demand correspondence	Locate generated letters and email correspondence across permitted channels.
Pending correspondence	Identify outstanding items needing preparation, review, provider setup or confirmation.
Pulse Delivery operations	Authorized operator recovery and provider/job investigation. The MEDES case and content permissions still apply.

Provider availability in this edition: The implementation includes adapter support for RingCentral/Phaxio fax, Lob print/mail, and Graph/SendGrid/SMTP email. Six local test connections were prepared without live credentials or activation. An available adapter is not an active provider account. Final external delivery remains subject to real configuration and acceptance.

Expected result: The latest attempt has an attributable provider state or an explicit configuration blocker; generation is not counted as delivery.

CHAPTER 21

Detailed reference · Reply to correspondence and record customer follow-up

Task context	Details
Screen / entry	the original correspondence and choose Reply to correspondence, or open Reply – On-demand Correspondence and select the original item.
Who acts	Authorized operator / eligible independent reviewer as specified below

Prepare a reply linked to original correspondence

1. Open the original correspondence and choose Reply to correspondence, or open Reply – On-demand Correspondence and select the original item.
2. Verify Original correspondence and the associated case/member. Enter Reply subject and Reply message.
3. Choose one or more Delivery channels: Secure portal, Fax, or Print and mail.
4. For Secure portal, Add recipient from the eligible directory and optionally Request a read receipt.
5. For Fax or Print and mail, choose a Published template and enter Recipient name and the required fax/postal destination. Select case-document attachments if needed.
6. Choose Prepare and send reply. If confirmation is interrupted, use Retry same reply.
7. Review Response by channel. Open each result to continue its own next step. The portal branch records a secure message; fax/print-mail branches create correspondence requiring PDF preparation and independent review before external delivery.

Reply subject supports up to 200 characters and Reply message up to 4,000 characters. The published letter is followed by the reply text. Check the whole PDF before approval. This particular reply screen offers portal/fax/print-mail; direct email correspondence is prepared in the letter-generation workflow.

2. If no response is needed, an authorized user may select No further action needed and record the explanation.
3. Enter the final Activity note and choose Close support activity.
4. Verify the recorded closed outcome. If further follow-up is required later, choose Reopen activity with a new note.
5. Inspect the preserved activity and response history. Reopening a support activity does not rewrite a prior case or eligibility decision.

Follow-up versus decision: Customer-support activity tracks the response to a customer. It does not approve eligibility, complete a document review or override the external delivery state. Those outcomes remain in their respective workflows.

Expected result: The reply or follow-up is linked to its original case/item and the required response evidence is retained.

CHAPTER 22

Detailed reference • Role dashboards, reports and analytics

Task context	Details
Screen / entry	the configured MEDES landing workspace
Who acts	Authorized operator / eligible independent reviewer as specified below

Start from your role workspace

1. Open the configured MEDES landing workspace. State/support/reporting/compliance users have general-dashboard proposals; case workers have a case-workload dashboard; document reviewers have a reviewer dashboard. Some operational role proposals land directly in their work queue or correspondence list.
2. Confirm the displayed domain/profile and Dashboard role, where available.
3. Read the current report cards. A card can be an authorized total or explicitly labeled Records in this preview.
4. Choose Open report for the record list, or a Next actions link for operational work.
5. Choose All MEDES reports to browse the reports permitted by the role. The role selector does not assign new access.

Operational report catalog

Report	Purpose	Entry
My document uploads	Uploads created by you in the current tenant. Storage, security screening and business review are separate steps.	My uploads
My document review work	Open reviews assigned to you. Open Document reviews to inspect the document and record your decision.	Document reviews
My review requests	Reviews you requested in the current tenant, including their recorded outcomes.	Document reviews
My documents to correct	Your returned reviews awaiting a replacement upload. Reviews already linked to a replacement are excluded.	Document reviews
My case work	Case work you requested, reviewed or currently own in this workspace.	Case work queue
Available case reviews	Unclaimed case reviews available to your current profile.	Case work queue
Available eligibility reviews	Independent eligibility reviews available to your current profile. Your own case reviews are excluded.	Case work queue
Team case work	Supervisor view of case work within your current member and tenant access.	Assignment management
Escalated case work	Escalations visible to your supervisor profile. Open the queue to inspect the reason and route the next step.	Assignment management
Outstanding correspondence	Correspondence without confirmed delivery, excluding cancelled requests. Provider acceptance does not confirm delivery.	Pending correspondence
Fax transmissions	Fax requests and their current provider status within your current case and member access.	Transmission log
Email correspondence	Email delivery requests. An accepted submission does not establish receipt by the destination mailbox.	On-demand correspondence
Print and mail tracking	Print and mail requests with the latest provider status. Only confirmed deliveries appear as delivered.	Print and mail tracking
Deliveries to reconcile	Uncertain provider submissions requiring review before another delivery is attempted.	Transmission details

Open and export operational report data

1. Open MEDES reports and use Find a report to search its name or purpose.
2. Open the report and check Updated time and the matching-record count.
3. Use the page controls to inspect additional records. Open source record where provided, or Open work area to use the owner workspace's filters/actions.
4. Choose Refresh report for a new read of the current data.
5. When permitted, choose Export displayed page. This CSV contains the currently displayed page, not every matching record in the system.

Reviewer and case-workload statistics

Workspace	What the figures mean
Document reviewer dashboard / My review statistics	Current assigned, pending and overdue reviews; approved/returned/rejected outcomes within the selected 7-, 30- or 90-day period; on-time completions; average request-to-decision time; oldest pending request.
Case workload dashboard	Current authorized tasks by state, completed tasks in the period, high/urgent open work, overdue and due-soon tasks, and tasks without a recorded deadline.
Workload scope	My case work is personal. Authorized team work is offered only with the team permission.
Completed work by day	The chart and table use the same recorded completion dates in UTC. The current workload count and a period's completion count measure different things.

Delivery and recipient analytics

1. Open Fax Transmission Summary, Recipient delivery analytics or Recipient correspondence analytics.
2. Set Period (Today, last 7, 30 or 90 days), Outcome and available Channel. Search by case, letter, recipient or transmission reference, then Apply filters.
3. Read Delivery outcomes: created, confirmed delivered, preparation/review, pending provider delivery, accepted awaiting confirmation, failed, unconfirmed and cancelled.
4. Inspect Daily activity and Recipients. Open a recipient to filter totals and records to that destination. The recipient table shows up to the 20 busiest destinations; narrow search for others.
5. Open a Matching correspondence record to resolve an exception in the source workspace.
6. Use Export daily summary if permitted. This exports the daily aggregate table, not all underlying correspondence records.

Confirmed delivery rate is based on confirmed delivery, not provider acceptance. Average queue-to-delivery time measures queueing through confirmation; it is not fax call duration. Daily counts use correspondence creation dates in UTC and include days with zero activity.

Find and export saved Vista outputs

1. Choose Find generated reports / Search Reports or the permitted Vista runs workspace.
2. Enter Report name or status and optional Run from (UTC) / Run through (UTC), then choose Search outputs.
3. Open a saved output and inspect its report name, published version, generated time and record count.
4. Read the Recorded output. This is the saved result of a recorded run, not a newly executed query.
5. If export is permitted, enter Export reason (8–1,000 characters) and choose Export CSV or Export Excel.
6. To create or change a report definition, use Published Vista templates or Report studio with the separate authoring/publication permissions.

The generated-output search follows current dataset access and can include outputs from other permitted modules. It is broader than the MEDES operational catalog. Do not assume an old saved report proves the current status of a task; open the live work area for that.

Expected result: The report uses the selected role/domain and filter scope. Its rows and totals can be traced to the corresponding authorized case or operational records.

CHAPTER 23

Detailed reference · Bell notifications, email links and next actions

Task context	Details
Screen / entry	the bell in the application header and select the relevant MEDES notification action.
Who acts	Authorized operator / eligible independent reviewer as specified below

A notification is an invitation to inspect a business record. Opening it, marking it read, or receiving an email does not approve or complete that record. The authoritative status and action remain in the destination workspace.

Act on a notification

1. Open the bell in the application header and select the relevant MEDES notification action.
2. Read the event and its reference. Use the action link rather than guessing which record to search for.
3. If sign-in is required, complete it with your own authorized account and select the correct profile.
4. At the destination, verify the record identity, current status and permitted next action. The record may have changed after the notification was generated.

5. Complete the actual business action in that screen, then return to the notification list and mark the notification read if needed.

Event	Email action / destination	Expected next step
Document submitted / review required	Open document review	Owner follows progress; assigned independent reviewer inspects the exact document and decides.
Review approved / rejected / changes requested	Open document review	Read the outcome; for returned evidence, create a replacement or corrected letter.
Secure documents requested	Upload requested documents	Named recipient signs in, uploads and selects Submit documents.
Documents submitted	Review submission	Receiving team checks screening and begins intake when ready.
Secure-upload accepted / returned / closed	View submission status	Read progress or the recorded reason. Request a new link where needed.
Case work updated / completed	Open case work	Inspect assignment, stage, task status and history.
Secure message available	Read secure message	Open the authorized conversation and respond as appropriate.
Correspondence status changed	View correspondence	Check preparation, review, provider status or confirmed delivery.

Email and access behavior

The prepared Pulse notification templates include action links to the particular work item. They require correct publication and notification routing. Links remain subject to recipient, session, role and record-access checks. The MEDES flows documented here do not promise a temporary token that bypasses sign-in or document grants. A forwarded email does not transfer access.

If an alert arrives without a useful link, report its event/reference and template to the Pulse administrator. If the link opens an unavailable record, check profile, assignment, expiry and current record access. If an event produces no email, first check the authoritative work record; the event may still have completed while notification delivery needs attention.

Desktop push: Visible desktop push and notification-click acceptance were explicitly deferred from the current completion scope. This guide covers the application bell and prepared email deep links; it does not claim desktop push has passed live acceptance.

Expected result: The notification opens the intended authorized item or its required sign-in path. The user performs the business action separately from marking the notification read.

Detailed reference • Administration and configuration handoffs

Task context	Details
Screen / entry	MEDES → Administration → MEDES settings.
Who acts	Authorized operator / eligible independent reviewer as specified below

MEDES settings links to the platform that owns each setting. This avoids maintaining a second set of users, policies or templates inside MEDES. A visible MEDES settings page does not automatically authorize changes in the destination platform.

Open the owner workspace

1. Open MEDES → Administration → MEDES settings.
2. Find the configuration area by name or description.
3. Choose an available owner link. If no links are shown for an area, the current profile lacks access to those settings.
4. Review the current effective configuration and submit changes through the owner's normal approval workflow.
5. After independent approval/publication, return to MEDES and refresh the affected workspace. Verify the actual intended behavior with the appropriate operational profile.

Need	Owner and starting point	Verification in MEDES
Users / domains / profiles / roles	IAM User accounts, Domains, Profiles, Roles and Approval queue.	Correct user can select the intended profile and only the permitted screens/actions.
Page layout, fields or controls	Axis Experience versions / Screens and controls; IAM Role and menu access.	The intended screen/control is published and its action rules are correct.
Logo / theme	Tenant Engine Current branding / Propose branding.	The published tenant branding appears in the workspace.
Document classes / metadata	Custodia Document classes, Metadata templates and Extraction and indexing.	Approved class appears in upload; required metadata can be completed; admission and indexing progress.
Reviewer document access	Custodia approved purpose/content grants.	The independent reviewer can preview the exact version without extra download/print rights.
Workflow / assignment / deadline	Regulix published process, assignment policies, SLA/calendar settings; MEDES Assignment management.	Review starts, correct independent worker is eligible, and due times reflect the published policy.

Need	Owner and starting point	Verification in MEDES
Letters / notifications / delivery	Pulse Letter templates, Email templates, Channel setup, Notification rules and Delivery operations.	Published MEDES template can generate; event reaches the intended user; live delivery has a verified receipt.
Entitlement / environment	Tenant Engine Effective settings and Configuration changes; TCP Environment control / Module subscriptions.	MEDES is available only in the authorized tenant context.
Reports / datasets	Vista Published reports, Report studio and Data sources.	Role sees appropriate reports and the result remains subject to current dataset access.
Retention / export / audit	Custodia Document retention / Governed exports; IAM User audit / Session history.	Policy and audit evidence can be inspected by the intended role.

User administration uses the IAM pattern

MEDES user administration opens the shared IAM User accounts functionality. Create, activation, sign-in setup, domain/profile assignment and independent access approval remain IAM operations. MEDES does not create a parallel identity record. An account can be active while its requested profile access still awaits approval.

For a new staff or partner user, the administrator establishes the account, completes the applicable activation/sign-in setup, proposes the domain/profile access, and obtains the required independent approval. The user then signs in and selects that authorized profile. Check the effective assignment rather than assuming that creating the account enabled the module.

Status and scope reference

MEDES status reference explains upload, intake, document-review, case-work, delivery and secure-message states and offers permitted links to the relevant work area. Use it when a chip's meaning is unclear. It is reference material; selecting a status does not perform a state transition.

MEDES scope reference preserves three source qualifications: a full external partner self-service UI was not established by the R1 mailbox/API notes; page-level fax quality scoring depends on gateway capability; automated legal-hold expiry requires compliance approval. The reference is not a release-date commitment or a switch that enables those features.

Expected result: The settings entry leads to the appropriate owning module and permitted configuration. Unavailable owner links remain an access/configuration issue rather than an implied completed setup.

Detailed reference • Troubleshooting and getting help

Start with the current record, selected profile and exact visible message. The same symptom can arise from missing configuration, a changed record, a permission boundary or an external provider. The table identifies the first check and the owner who can resolve it.

Symptom	First action	Escalation owner
MEDES or a screen is missing	Confirm current profile, module release/version and tenant entitlement.	IAM / Tenant Engine / release administrator.
Page opens, action is missing	Check assignment, ownership, state and separate action permission.	IAM plus the business supervisor.
Session ended / access could not be confirmed	Sign in again, select the correct profile and verify saved work before submitting.	IAM support if it repeats after a fresh sign-in.
No documents or cases in results	Clear filters, check domain/profile and current member/document access.	Member source or document owner.
No upload content class	The class must be approved and available to the current profile.	Custodia administrator.
File rejected before upload	Check format, class rules, 25 MiB file limit, 100 MiB batch total and filename.	Content owner for an acceptable source file.
Some files stored, others failed	Retry Remaining Files in the existing wizard; inspect My uploads before reselecting files.	Custodia operations if storage failures persist.
Stored but cannot open document	Inspect custody admission and the exact version's access.	Custodia owner/administrator.
Intake is awaiting a decision	Begin intake, then confirm a single document, split, or reject with a reason.	Intake operator.
Split unavailable	Verify PDF, preview access, Needs splitting state and unreviewed source.	Document owner / intake operator.
Split pages do not validate	Assign every page once in contiguous groups, with at least two groups.	Intake operator.
Split/packet warns about signatures, annotations or redactions	Obtain an approved flattened source that preserves required protections.	Document owner / Custodia.
Metadata setup required	A published metadata schema is missing.	Custodia schema administrator.
Indexing needs rechecking	Review updated metadata/context and confirm indexing again.	Indexer.
Member information changed	Refresh/link the current member context before starting dependent work.	Member-source owner / authorized case user.
No eligible reviewer grant	Confirm admission, exact version, independent recipient, purpose and grant validity.	Custodia owner and review administrator.

Symptom	First action	Escalation owner
Review cannot start / Awaiting start	Resume the saved review submission; check published workflow and assignment policy.	Regulix administrator.
Review assigned but document unavailable	Task assignment did not create a content grant. Check current preview access.	Document owner / Custodia.
Review period ended	Contact the owner; do not force a decision through an expired assignment.	Review owner / supervisor.
Task cannot be claimed or decided	Check stage, current assignee, independent-review rules and lock status.	Supervisor / IAM.
Saved action awaiting confirmation	Use Retry saved action or Refresh task to reconcile the current result.	Workflow operations if it remains unresolved.
Eligibility button disabled	Complete outcome, effective date, reason and all required evidence confirmations; verify assignment.	Eligibility supervisor.
Recipient or workgroup not found	Search current active eligible people/roles/workgroups; verify context access.	IAM / workgroup owner.
Message attachment cannot open	Attaching a file did not grant access. Request its approved current grant.	Document owner.
Partner request expired or closed	Ask the receiving team for a new request.	Receiving team.
No published letter template	Publish an eligible MEDES Pulse letter template; an email alert template is different.	Pulse template owner/reviewer.
PDF remains queued or failed	Read the rendering detail and verify the approved renderer/template configuration.	Pulse operations.
PDF Ready but no delivery button	Complete packet, archive, admission, indexing and exact fulfillment review.	Correspondence owner / reviewer.
Attachment changed or unavailable	Refresh current access or create a new letter using current admitted documents.	Document owner / correspondence operator.
Waiting configuration / Test only	Have the provider connection and live sender setup completed; test requests are not external sends.	Pulse communications administrator.
Accepted but not delivered	Inspect later provider status/receipt; allow the configured status-check interval.	Delivery operations if delayed beyond expected provider behavior.
Unknown delivery	Reconcile the existing request with the provider before a second send.	Delivery operations.
Provider settings changed / Needs review	Review current connection and release only the still-approved exact letter.	Communications administrator and letter owner.

Symptom	First action	Escalation owner
Customer activity cannot close as responded	Open each linked record and finish pending delivery or document processing.	Support agent / responsible operations team.
Report missing or has different totals	Check role, scope, filters, period, authorized access and preview versus total labeling.	Vista / IAM administrator.
CSV contains fewer records than expected	Export displayed page exports only the current page; use authorized saved report output for the intended scope.	Reporting user / Vista owner.
Notification lacks a link or email never arrives	Keep the event/reference, check the work record, then inspect published template/routing and delivery attempts.	Pulse administrator.
Request JSON / schema validation error	Record the exact screen and error; changing roles will not repair an incompatible request contract.	Application support / release team.

What to include in a support request

- Screen/work area and the action selected; record/case/review/correspondence reference.
- Selected domain/profile, the observed status and the approximate date/time with timezone.
- Exact visible error and a screenshot restricted to the relevant area, with unnecessary personal information removed.
- Whether the action was confirmed, pending, or retried using the saved request; include the provider reference for a delivery issue.
- Never include passwords, session cookies, one-time codes, provider secret values or unrestricted document contents in the request.

CHAPTER 26

Detailed reference · Terminology, field sources and record history

Term	Meaning in MEDES
Tenant / domain / profile	The organization/configuration boundary, authorized workspace and selected bundle of responsibilities used for this session.
Role / action permission	A defined responsibility and its explicit allowed operation. A page view and a decision permission are separate.
Business context	A current member/case reference linking a document or activity to the right business work.
Content class	Custodia's approved classification governing upload rules, metadata and content handling.

Term	Meaning in MEDES
Metadata	Structured descriptive values defined by the current approved content schema.
Security admission	Custodia's content acceptance stage following storage.
Indexing	Confirmation that required metadata and business context match the document's current evidence.
Grant / purpose	Approved permission for a particular person/purpose to access the relevant document version.
Independent review	A decision made by an eligible person separate from the submitting/prior-stage actor as required by the workflow.
Version / revision	A particular document version or current record revision. Changed evidence may invalidate a previously prepared action.
Workflow handoff	Transfer of a saved business request into the native workflow process and its next checkpoint.
Idempotent retry	The application retries the same saved operation so an interrupted response does not create duplicate business work. Users use the named retry action.
Correspondence packet	Generated letter plus ordered admitted case-document PDF attachments, reviewed as one complete output.
Fulfillment review	Independent approval of the exact PDF, recipient, channel and destination before outbound delivery.
Provider reference	Identifier for the external fax/email/print-mail provider's request or delivery record.
Saved report output	The recorded results from a prior Vista run. Refreshing a source report is a different operation.
Source entry / shared workflow entry	An original UI entry which may open a full workspace or a specific step/tab in another shared workspace.

Where selectable values come from

Value	Authoritative source	Why an option may be absent
Members	Authorized current member source exposed to MEDES.	Current member access or source reference unavailable.
Business contexts	Current eligible member/case references.	Inactive/stale reference or missing case/member access.
Content classes and metadata choices	Published Custodia content configuration.	Draft/unpublished schema or class not allowed for profile.

Value	Authoritative source	Why an option may be absent
Reviewers and approved purposes	Current approved Custodia preview grants and workflow eligibility.	No independent recipient, expired grant, unadmitted source or unpublished workflow.
Task assignees	Current IAM eligibility and Regex assignment rules.	User not eligible for stage/member scope or independence conflict.
Message audiences	Current active IAM users/roles and governed workgroups.	Missing sender/recipient eligibility or related-record access.
Letter templates	Reviewed, published MEDES Pulse template versions.	Draft, wrong module, unavailable revision or missing permission.
Provider connections	Pulse/outbound configuration for the selected channel.	Unconfigured, disabled, test-only or unavailable channel connection.
Reports / dashboard roles	Vista report requirements and the selected IAM assignment.	Role lacks report/source access or no applicable published definition.

Read the right history

Use Document history for file/version events, Document reviews for independent evidence decisions, Work history for task actions and eligibility checkpoints, conversation receipts for messages, Delivery history for external submissions and confirmations, and Recorded responses for customer follow-up. A later workflow stage should point back to the relevant evidence rather than replace it.

CHAPTER 27

Detailed reference • Appendix A. Complete screen and workflow entry index

This index covers all 66 source entry points. Labels in the original UI are retained for traceability; the current implementation may present a clearer workspace title or consolidate the entry into a shared flow. Two distinct source entries used SCR-060 and have separate named routes. A direct link to a detail step requires the relevant record context and current permissions.

Original entry / label	Current entry	Task / chapter
SCR-001 · Dashboard	medes-scr-001	MEDES dashboard: authorized role reports and next actions. See chapter 15.
SCR-002 · Search Documents	medes-scr-002	Documents: search accessible evidence; open details, content, metadata and history. See chapter 6.
SCR-003 · Search Results	medes-scr-003	Shared document search/results workspace; retain filters and select the record. See chapter 6.

Original entry / label	Current entry	Task / chapter
SCR-004 · Document Viewer	medes-scr-004	Shared document workspace at View document; requires the selected document. See chapter 6.
SCR-005 · Send Message from Grid	medes-scr-005	Compose a secure message from a document/grid context. See chapter 11.
SCR-006 · View Message from Grid	medes-scr-006	Open the conversations related to the selected grid record. See chapter 11.
SCR-007 · Message Link Detail View	medes-scr-007	Follow a message-linked document/case while preserving current access checks. See chapter 11.
SCR-008 · View Metadata of Selected Document	medes-scr-008	Shared document Metadata tab in read mode. See chapter 6.
SCR-009 · Edit Document Metadata	medes-scr-009	Shared document Metadata tab; edit only with permission and an unlocked version. See chapter 6.
SCR-010 · Document Split - Fax	medes-scr-010	Split an unreviewed admitted PDF packet into verified named page groups. See chapter 7.
SCR-011 · Client Information / Related Documents	medes-scr-011	Member context and related documents; link current member information or start an exchange case. See chapter 5.
SCR-012 · Reply - On-demand Correspondence	medes-scr-012	Reply to original correspondence using portal, fax and/or print/mail channels. See chapter 14.
SCR-013 · Document History	medes-scr-013	Shared document History tab for the selected document. See chapter 6.
SCR-014 · View Letter / Correspondence	medes-scr-014	Generated letter: inspect the selected correspondence and exact PDF. See chapter 12.
SCR-015 · Messages Toolbar / Notification Entry	medes-scr-015	Secure-message entry from toolbar/notification context. See chapter 11, 16.
SCR-016 · Inbox - Secure Messages	medes-scr-016	Secure messages: inbox, sent, drafts, organization and conversation search. See chapter 11.
SCR-017 · View Message Content	medes-scr-017	Read the selected conversation and permitted reply/forward actions. See chapter 11.
SCR-018 · Send / Compose Message	medes-scr-018	Compose a new secure message, pick recipients and link authorized documents. See chapter 11.

Original entry / label	Current entry	Task / chapter
SCR-019 · Open Document from Inbox or Grid	medes-scr-019	Open a linked document from a conversation with current content checks. See chapter 11, 6.
SCR-020 · Upload Documents	medes-scr-020	Upload documents through Select Files, Enter Details, Review and Upload. See chapter 6.
SCR-021 · Upload Documents - Enter Details	medes-scr-021	Shared upload wizard; details step remains within the validated flow. See chapter 6.
SCR-022 · Upload Documents - Validate	medes-scr-022	Shared upload wizard; validation does not bypass earlier required steps. See chapter 6.
SCR-023 · Upload Documents - Confirm	medes-scr-023	Shared upload wizard; confirmation uses the same validated batch. See chapter 6.
SCR-024 · View Uploaded Documents	medes-scr-024	My uploads: inspect storage, custody and business review; request review where permitted. See chapter 6, 9.
SCR-025 · Fax Cover Sheet List	medes-scr-025	Fax correspondence: existing fax work, draft preparation and tracking. See chapter 12, 13.
SCR-026 · Create Fax Cover Sheet	medes-scr-026	Create fax cover with current case, published template, cover fields and destination. See chapter 12.
SCR-027 · Fax Cover Sheet Preview and Send	medes-scr-027	Fax preview and delivery: exact PDF preparation, fulfillment review and provider selection. See chapter 12, 13.
SCR-028 · Manage Cover Sheet Templates	medes-scr-028	Published MEDES correspondence templates. Author/edit/review in the separate Pulse owner workspace. See chapter 12, 17.
SCR-029 · Transmission Log	medes-scr-029	Transmission log: inspect existing correspondence delivery states. See chapter 13.
SCR-030 · Transmission Details	medes-scr-030	Transmission details: exact request, provider state and history. See chapter 13.
SCR-031 · Fax Status by Recipient	medes-scr-031	Fax recipient status: locate fax requests and inspect their recipient/delivery state. See chapter 13.
SCR-032 · Fax Transmission Summary	medes-scr-032	Fax transmission summary: aggregated fax outcomes and matching source records. See chapter 15.

Original entry / label	Current entry	Task / chapter
SCR-033 · Admin Assignments - Lock / Unlock	medes-scr-033	Assignment management: permitted supervisor routing, reassignment, lock/unlock and recovery. See chapter 10.
SCR-034 · Reports Catalogue	medes-scr-034	MEDES reports: the role-filtered operational catalog. See chapter 15.
SCR-035 · Report Details	medes-scr-035	Current report details: pagination, source work area and displayed-page export. See chapter 15.
SCR-036 · Search Reports	medes-scr-036	Find generated reports: current access to saved Vista run outputs and audited exports. See chapter 15.
SCR-037 · Work Queue	medes-scr-037	Case work queue: My work, Available to claim and authorized team filters. See chapter 10.
SCR-038 · Task Details	medes-scr-038	Task details: current assignment, state, next action and work history. See chapter 10.
SCR-039 · Action Menu	medes-scr-039	Shared task action workspace; actions depend on the selected task and state. See chapter 10.
SCR-040 · Route To	medes-scr-040	Shared routing/assignment workspace; choose an eligible assignee when permitted. See chapter 10.
SCR-041 · Statuses Reference	medes-scr-041	MEDES status reference: meanings, next actions and work-area links. See chapter 17, 19.
SCR-042 · Dashboard	medes-scr-042	MEDES administration dashboard: authorized reports and owner work links. See chapter 15.
SCR-043 · Admin User Management	medes-scr-043	MEDES user administration: reuse shared IAM User accounts, lifecycle and access proposals. See chapter 17.
SCR-044 · System Settings	medes-scr-044	MEDES settings: owner links across the seven platforms and TCP. See chapter 17.
SCR-045 · Features Not in DMP	medes-scr-045	MEDES scope reference: source qualifications, not feature activation or a release commitment. See chapter 17.
SCR-046 · Document Intake Queue	medes-scr-046	Document intake: inspect, begin, confirm single document, split or reject. See chapter 7.

Original entry / label	Current entry	Task / chapter
SCR-047 · Document Classification & Indexing	medes-scr-047	Classify and index: schema-driven metadata, current context, confirmation and review request. See chapter 7.
SCR-048 · Document Review Queue	medes-scr-048	Document reviews: assigned/owned filters, exact review, decisions and replacements. See chapter 9.
SCR-049 · Correction / Rejection Queue	medes-scr-049	Shared reviews with Requested by me / Awaiting correction; rejected outcomes remain available through completed/all filters. See chapter 9.
SCR-050 · Member / Case Context Panel	medes-scr-050	Member/case context: current source facts, documents and permitted case actions. See chapter 5.
SCR-051 · Eligibility Decision	medes-scr-051	Eligibility task: independent outcome, effective date, evidence checklist and reason. See chapter 10.
SCR-052 · Secure Upload Workspace	medes-scr-052	Secure upload: named recipient, expiring request, file submission and receiving-team intake. See chapter 8.
SCR-053 · Partner Mailbox	medes-scr-053	Partner mailbox: secure messaging plus separate tenant entitlement. See chapter 11.
SCR-054 · Respond to Customer	medes-scr-054	Respond to customer: support activity, response handoffs, evidence links, closure and reopening. See chapter 14.
SCR-055 · Exchange Case Search	medes-scr-055	Exchange cases: search, create and open the member-bound case. See chapter 5.
SCR-056 · Print/Mail Tracking	medes-scr-056	Print and mail tracking: inspect provider progress and receipt. See chapter 13.
SCR-057 · On-demand Correspondence List	medes-scr-057	On-demand correspondence: letters across permitted channels and private drafts. See chapter 12, 13.
SCR-058 · Pending Correspondence Queue	medes-scr-058	Pending correspondence: preparation, review and delivery work without confirmed completion. See chapter 12, 13.
SCR-059 · Generate Letter	medes-scr-059	Generate a letter for a current case using a published template. See chapter 12.
SCR-060 · Recipient Analytics	medes-recipient-correspondence-analytics	Recipient correspondence analytics: cross-channel totals and matching correspondence. See chapter 15.

Original entry / label	Current entry	Task / chapter
SCR-060 · Recipient Analytics Dashboard	medes-recipient-delivery-analytics	Recipient delivery analytics: fax-default outcomes and recipient drilldown; available channel filtering. See chapter 15.
SCR-061 · Dashboard	medes-scr-061	MEDES platform dashboard: currently authorized role reports and actions. See chapter 15.
SCR-062 · Dashboard	medes-scr-062	Document reviewer dashboard: assigned work, recent decisions and trends. See chapter 15.
SCR-063 · Document Review History	medes-scr-063	Shared reviews with Assigned to me / All reviews; inspect recorded history/outcomes. See chapter 9.
SCR-064 · My Review Statistics	medes-scr-064	My review statistics: current workload and period outcomes. See chapter 15.
SCR-065 · Dashboard	medes-scr-065	Case workload dashboard: personal/team scope, deadlines and completion trends. See chapter 15.

CHAPTER 28

Detailed reference · Appendix B. Proposed role and action access reference

The reference below is generated from the prepared role permission plan. P means the implementation proposes the action; a dash means it is not in that role's prepared action set. This is not evidence that the grant is effective in Azure. Native review and profile assignment are required, and owner/data permissions and record-state rules still apply.

Role	Selected proposed capabilities	Reference status
State User	Upload, Intake, Split, Create case	Proposed only; complete named actions in Role_Action_Access.csv.
Case Worker	Create case	Proposed only; complete named actions in Role_Action_Access.csv.
Eligibility Specialist	Upload, Create case, Eligibility	Proposed only; complete named actions in Role_Action_Access.csv.
Document Reviewer	Intake, Index, Document review	Proposed only; complete named actions in Role_Action_Access.csv.
Support Agent	Upload, Intake, Split, Index, Create case	Proposed only; complete named actions in Role_Action_Access.csv.
Supervisor	Document review, Create case, Eligibility	Proposed only; complete named actions in Role_Action_Access.csv.

Role	Selected proposed capabilities	Reference status
Correspondence Manager	None in this selected capability summary	Proposed only; complete named actions in Role_Action_Access.csv.
Tenant Administrator	Saved-output export, Settings page	Proposed only; complete named actions in Role_Action_Access.csv.
Security Administrator	None in this selected capability summary	Proposed only; complete named actions in Role_Action_Access.csv.
Reporting Analyst	Saved-output export	Proposed only; complete named actions in Role_Action_Access.csv.
Compliance Officer / Auditor	Saved-output export	Proposed only; complete named actions in Role_Action_Access.csv.
Integration Administrator	None in this selected capability summary	Proposed only; complete named actions in Role_Action_Access.csv.
Platform Administrator	Upload, Intake, Index, Document review, Create case, Eligibility, Settings page	Proposed only; complete named actions in Role_Action_Access.csv.

The companion Role_Screen_Access.csv lists every entry against every role using the proposed page-view cells. Role_Action_Access.csv lists the proposed named actions by role and entry. Dependency page views included for a shared workflow are retained rather than silently removed. These reference files are read-only guide outputs; importing them does not provision access.

CHAPTER 29

Detailed reference · Appendix C. Custodia-to-MEDES handoff and operator quick reference

The document owner and the business workflow each preserve their own evidence. Keep these references together when teaching the complete journey.

Stage	Reference to retain	Next responsible person
Custodia capture	Document ID, version, storage/admission outcome.	Intake operator.
MEDES intake and indexing	Intake/split lineage and current member/case context.	Document reviewer with a valid content grant.
Independent document review	Exact reviewed version, decision and task history.	Case worker.
Case / eligibility work	Case/task reference, required evidence and recorded decision.	Independent eligibility reviewer where required.
Correspondence	Published template version, generated complete PDF, archive/admission/indexing and fulfillment review.	Correspondence operator.

Stage	Reference to retain	Next responsible person
External delivery	Delivery request, configured channel/provider, attempts and confirmed provider outcome.	Response/support owner.
Reporting and close	Report source/snapshot and support-response evidence.	Supervisor/auditor.

Document processing batches, a queued MEDES delivery and a general enterprise Scheduler job are different things. Use only the installed Scheduler's registered eligible operations for automation; this guide does not assert that every MEDES button is schedulable.

1. At the start of a shift, confirm the selected profile and open assigned work/review queues.
2. Before making a decision, inspect current evidence and exact object/version.
3. After a save/submit, retain the request reference and verify the confirmed result.
4. For lost responses use the offered saved-request recovery, not a duplicate new case/message/delivery.
5. At handover, record pending owner, state, due time and missing configuration/evidence.
6. For support, provide the time, operation, current profile and correlation/request ID without copying credentials or patient document content.

CHAPTER 30

Cross-module handoffs and the record references to retain

Next module	What to carry across	Open the related guide
Custodia	Preserve exact evidence versions, processing, review and archive receipts.	Custodia
Regulix	Correlate native instance/task assignment with the owning case.	Regulix
Pulse	Select eligible published content and separate generation from delivery.	Pulse
IAM	Activate intended MEDES roles/APIs before presenting a live business journey.	IAM

CHAPTER 31

Problem → responsible action → safe continuation

Procedure	Observed problem	Recovery
Find the current member and open one exchange case	MEDES is absent from the menu	Verify native module activation, role grants and APIs; do not insert a static menu as a workaround.
Find the current member and open one exchange case	The member/context is stale	Reload and verify the current business context before saving.
Triage, split and index a PDF packet	Ranges do not cover the packet correctly	Correct the last group or split plan before execution.
Triage, split and index a PDF packet	A file is quarantined or unavailable	Resolve admission with the custody/security owner before business processing.
Request, submit and accept recipient-bound evidence	The link is opened by another account	Use the intended recipient; a copied URL does not expand access.
Request, submit and accept recipient-bound evidence	The request expired or a file failed screening	Resolve the allowed request/file state before attempting acceptance.
Review evidence and complete assigned case/eligibility work	Start confirmation was interrupted	Use Retry saved start and inspect the existing case work record.
Review evidence and complete assigned case/eligibility work	Approve/complete is missing	Check assignment, stage, subject independence and current permissions rather than changing status directly.
Prepare a complete packet before external delivery	The packet says Not archived	Complete the Custodia handoff before the permitted dispatch path.
Prepare a complete packet before external delivery	A source/template/recipient changed after review	Obtain the required refreshed packet/review rather than releasing stale content.
Dispatch once, reconcile status and record follow-up	Waiting configuration / Test only	Have the communications owner configure approved live provider references; do not claim delivery.
Dispatch once, reconcile status and record follow-up	Provider accepted but recipient has no confirmed delivery	Inspect provider receipt/history and permitted follow-up before resending.