

Last Updated: September 1, 2021

# DocuPhase User Guide

Navigation & Utilization in DocuPhase





# Welcome

## About DocuPhase

DocuPhase is a secure place to store, organize, and access information. It will be used as a document repository for incoming rental assistance applications. Applications will be transferred from the centralized Cognito to DocuPhase for application processing.

### What you can do with DocuPhase:

- ✓ Open and view documents online
- ✓ Document repository tool
- ✓ Ability to annotate a file
- ✓ See version history – monitor who updated or touched a document and when
- ✓ Search – documents, people
- ✓ Application and documents specific to each RAA

## About This Guide

This document walks through using the DocuPhase platform. Follow this guide for instructions and best practices for working in DocuPhase to process Central Applications.

## Still have Questions?

Several resources are available to help you learn:

1. Your Resources posted on the [RAA Resource Portal](#) under [Central Application](#)
2. Direct policy and process questions to your supervisor who can contact the RAA support inbox, if necessary, ([dhcdraaraft@mass.gov](mailto:dhcdraaraft@mass.gov)) as a point of escalations for questions.
3. For Central App technical issues, please submit a ticket via your Central App portal account.



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# Getting Started





# Getting Started

## Browser

Browsers such as Internet Explorer (Version 10 or above), Microsoft Edge, Apple Safari, Google Chrome, and Mozilla Firefox are fully supported for DocuPhase online. Use one of these browsers for the best experience with the platform.

## Access/Login

Users can access the RAA-specific DocuPhase by logging in with a username and password. If you have questions about gaining access, contact your supervisor or your IT department.

## Bookmarking

As a best practice, bookmark the DocuPhase page in your preferred browser as a means of easy access for use on a regular basis. Bookmarking holds the place for a web page, allowing for quick access instead of searching for it. Clicking the bookmark directs you to the desired page immediately.

Learn more here: <https://mycomputerworks.com/how-to-bookmark-webpages-browser/>

### ***Notice these call-out icons in the document***



Pay Attention! This is an important reminder



Best Practice. This will show you a valuable tip

# DocuPhase Basics



## DocuPhase Login

The image shows a login form for the DocuPhase system. At the top left is the DocuPhase logo, which consists of a stylized blue 'd' and 'p' followed by the word 'DOCUPHASE' in black. Below the logo, there are two input fields. The first is labeled 'Login' and contains a single vertical bar as a placeholder. The second is labeled 'Password'. To the right of these fields is a blue button with the word 'Login' in white text.

 **DOCUPHASE**

Login

|

Password

Login

1. Start your preferred browser and enter the appropriate Web address for the DocuPhase system
2. Click Go or press Enter.
3. At the Login screen in the browser window, enter your **Login ID** and **Password** and click **Login**.

# DocuPhase Structure - Search

1. **Application** is the workspace location holding the files, RAAs will only be able to see the applications assigned to their RAA
2. **Indexes** are the fields by which documents may be searched/filtered
3. **Search** opens the page(s) of documents (applications and related documentation submitted by clients)

The screenshot shows the DocuPhase Search interface. At the top, there is a blue header bar with the DocuPhase logo and the word "SEARCH". Below the header, there is a navigation bar with "Search" and "Capture" tabs. A green box labeled "1" highlights the "APPLICATION:" dropdown menu, which is currently set to "MASS Central". A green box labeled "2" highlights the "Indexes" section, which is a list of fields that can be used to search or filter documents. The fields include: RAA, Applicant ID, First Name, Last Name, Initial, Document Description, Document Status, Document Date, Member Name, Location Ref, Portal Confirmation, Split Required, Entry Number, FileImportID, SP ID, and TXSP. A green box labeled "3" highlights the "Search" button. The interface also includes a "Global Search" search bar in the top right corner and a "Powered By DocuPhase" footer.

DocuPhase SEARCH

Search Capture

APPLICATION: MASS Central

1

2

3

Search

Global Search

Powered By DocuPhase

Logged In As: Kaley Matchett



# DocuPhase Structure – Search Results

Similar to a search performed on the internet, a query within DocuPhase retrieves Documents according to search criteria composed of Index values that identify or characterize the desired documents.

**DOCUPHASE RESULTS** Global Search

Search Capture

APPLICATION: MASS Central

**MASS CENTRAL** Sort Order: Member Name ASC **Records: 41**

<input type="checkbox"/>	File Note	RAA	Applicant ID	First Name	Last Name	Initial	Document Description	Document Status	Document Date	Member Name
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST	Proof of Crisis	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST	Application	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST	Proof of Ownership	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST	Proof of Housing	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST	Verifications	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST	Application	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST	Verifications	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST	Photo ID	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST	Other	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10312	MOVING	TEST	Verifications	Unreviewed	7/27/2021	

☐ Select All results

1 2 3 4 5







**Callouts:**

- Select all items on this page
- List of matching items on this page found by the search
- Checkmark each item to select it
- Click file icon to display the document
- Select all items on this page
- Operations to apply to selected item(s)
- Multiple pages of matched items

# DocuPhase Search Tools



## Results Page Action Bar

	<b>Edit Last Query</b>	Returns to search page to update search values
	<b>Toggle Tag Controls</b>	View/Hide Tags (Keywords which have been linked to a document to associate it with other documents)
	<b>View in Indexing</b>	Bulk Re-Index (adjust search criteria) for selected documents
	<b>Refresh</b>	Refresh results page of documentation which match search criteria
	<b>Print Search Results</b>	Print results list, does not print documents
	<b>Toggle Full Screen</b>	Switch between full screen and minimized screen


**DOCUPHASE RESULTS**













[Search](#)
[Capture](#)

APPLICATION: MASS Central



**MASS CENTRAL** Sort Order: Member Name ASC

**Records: 41**

<input type="checkbox"/>	File Note	RAA	Applicant ID	First Name	Last Name	Initial	Document Description	Document Status	Document Date	Member Name
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST	Proof of Crisis	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST	Application	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST	Proof of Ownership	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST	Proof of Housing	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST	Verifications	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST	Application	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST	Verifications	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST	Photo ID	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST	Other	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10312	MOVING	TEST	Verifications	Unreviewed	7/27/2021	

1 2 3 4 5

☐ Select All results
  View Event History
  Print Event History
  Delete
  Favorites

# Specific Search

A specific search refines and narrows results by **returning only documents whose Index values match** the query criteria submitted during the search.

Values can be entered into a standard field as:

- A text or numeric value,
- Selected from drop-down list **OR**
- Entered in a range field

The screenshot displays the DocuPhase SEARCH application interface. At the top, there is a blue header bar with the DocuPhase logo and the word "SEARCH". Below the header, there are tabs for "Search" and "Capture". A "Global Search" input field is located in the top right corner. The main content area features a search form with various filters. The "APPLICATION:" dropdown is set to "MASS Central". The search form includes fields for RAA (a dropdown menu), Applicant ID, First Name, Last Name, Initial, Document Description (a dropdown menu), Document Status (a dropdown menu), Document Date (with a "To:" range field), Member Name, Location Ref, Portal Confirmation, Split Required (a dropdown menu), Entry Number (with a "To:" range field), FileImportID, SP ID, TXSP (a dropdown menu), and Object Status (a dropdown menu). There are also checkboxes for "System" and "Advanced". A "Search" button is located at the top right of the search form. The footer of the interface shows "Powered By DocuPhase" and "Logged In As: Kaley Matchett".

# Specific Search - Multiple Values

Multiple index fields may be used to narrow down the results of a search

Additionally, use Ctrl-Click to select/de-select each of many individual selections for a drop-down value selector

The screenshot displays the DOCUPHASE SEARCH application interface. At the top, there is a blue header bar with the DOCUPHASE logo and the word "SEARCH". Below the header, there is a navigation bar with "Search" and "Capture" tabs. The main content area shows a search form with the following fields:

- APPLICATION:** A dropdown menu set to "MASS Central".
- Search:** A blue button.
- RAA:** A dropdown menu set to "NWHS".
- Applicant ID:** A text input field.
- First Name:** A dropdown menu set to "Test".
- Last Name:** A text input field.
- Initial:** A text input field.
- Document Description:** A dropdown menu set to "Application".
- Document Status:** A dropdown menu set to "Unreviewed".
- Document Date:** A text input field with a "To:" label and another text input field.
- Member Name:** A text input field.
- Location Ref:** A text input field.
- Portal Confirmation:** A text input field.
- Split Required:** A dropdown menu set to "-choose-".
- Entry Number:** A text input field with a "To:" label and another text input field.
- FileImportID:** A text input field.
- SP ID:** A text input field.
- TXSP:** A dropdown menu set to "-choose-".
- System:** A checkbox labeled "System".
- Advanced:** A checkbox labeled "Advanced".
- Object Status:** A dropdown menu set to "-choose-".



Specific Search can be used to find an individual client's file(s). Entering values in more than one field will narrow the search results

## Specific Search - Wildcard

An asterisk (\*), called a **wildcard**, may be used in the middle or end of a set of characters to replace an unknown portion of a search criteria

The screenshot displays the DocuPhase SEARCH interface. At the top, there is a blue header bar with the DocuPhase logo and the word "SEARCH". Below the header, there is a navigation bar with "Search" and "Capture" tabs. The main content area shows a search form for the "MASS Central Test" application. The form includes various fields for search criteria. The "Applicant ID" field is highlighted with a green box and contains the text "METST10\*". A blue arrow points from this field to a second, identical search form below it, which also has "METST10\*" in the "Applicant ID" field. The second form is also highlighted with a green box. The "Applicant ID" field is highlighted with a green box in both forms. The "Applicant ID" field is highlighted with a green box in both forms. The "Applicant ID" field is highlighted with a green box in both forms.



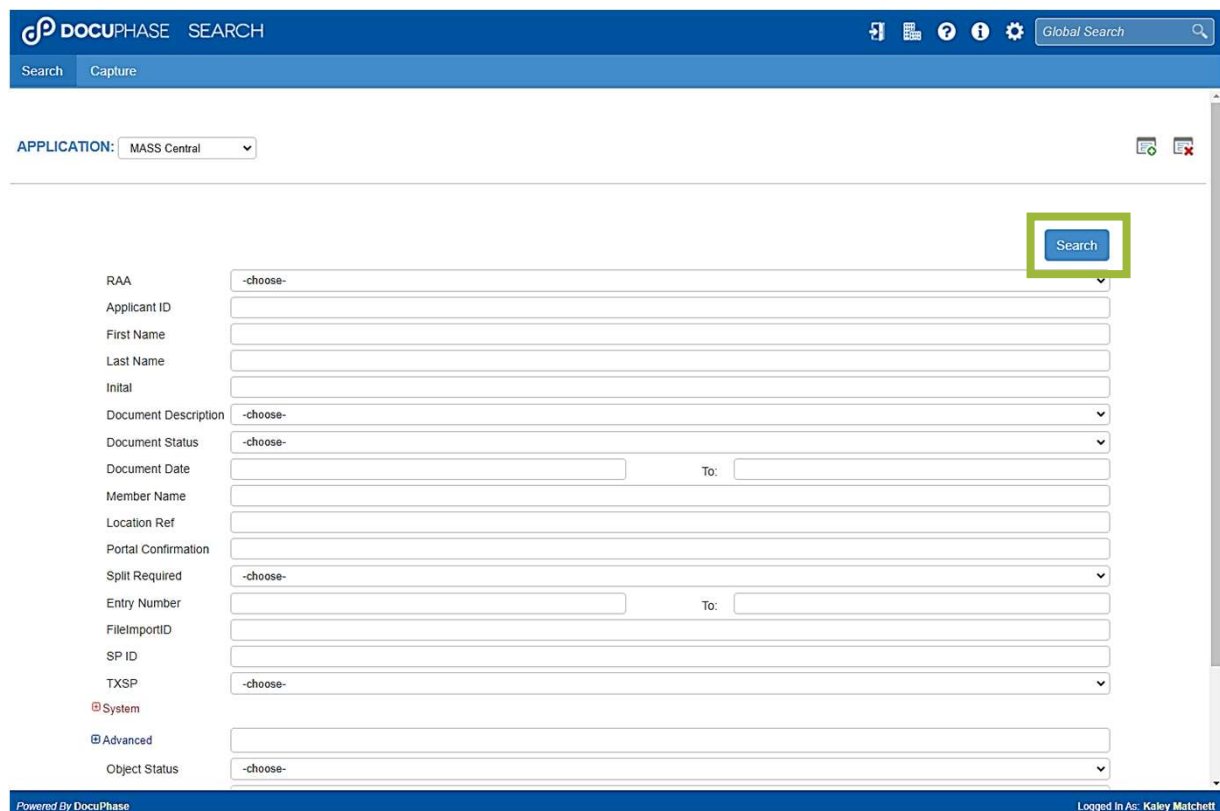
**EXAMPLE** Staff can enter a wildcard when only a partial application ID is known to find the correct applicant

# Unspecific Search

Searching without entering any index values **will bring all documents to view**. This action is not recommended, it will return all Central App Documents.

All items match the Unspecific Search criteria and are available via its Results page display and page list.

Despite the fact that all items may 'match' the search criteria, they are not all displayed until their pages are selected.



The screenshot displays the DocuPhase SEARCH application interface. At the top, there is a blue header bar with the DocuPhase logo and the word "SEARCH". Below the header, there are tabs for "Search" and "Capture". The main content area features a search form with the following fields:

- APPLICATION: MASS Central (dropdown menu)
- RAA: -choose- (dropdown menu)
- Applicant ID: (text input)
- First Name: (text input)
- Last Name: (text input)
- Initial: (text input)
- Document Description: -choose- (dropdown menu)
- Document Status: -choose- (dropdown menu)
- Document Date: (text input) To: (text input)
- Member Name: (text input)
- Location Ref: (text input)
- Portal Confirmation: (text input)
- Split Required: -choose- (dropdown menu)
- Entry Number: (text input) To: (text input)
- FileImportID: (text input)
- SP ID: (text input)
- TXSP: -choose- (dropdown menu)
- @ System: (checkbox)
- @ Advanced: (checkbox)
- Object Status: -choose- (dropdown menu)

A green box highlights the "Search" button in the top right corner of the form. The footer of the interface includes the text "Powered By DocuPhase" and "Logged In As: Kaley Matchett".



It is not recommended to perform an unspecific search because it will return too many results.

# Results Page

Once the results populate, a document can be selected and will appear in the content viewer screen on the right

Be careful when clicking on highlights data within the rows of document information. To open a document, click on the **File icon**

**DOCUPHASE RESULTS**

Search Capture

APPLICATION: MASS Central

**MASS CENTRAL** Sort Order: Member Name ASC Records: 41

File Note	RAA	Applicant ID	First Name	Last Name	Initial	Document Description	Document Status	Document Date	Member Name
	Add	MHB	MEN10011	Notreal	TEST	Proof of Crisis	Unreviewed	7/20/2021	
	Add	MHB	MEN10011	Notreal	TEST	Application	Unreviewed	7/20/2021	
	Add	MHB	MEN10011	Notreal	TEST	Proof of Ownership	Unreviewed	7/20/2021	
	Add	MHB	MEN10011	Notreal	TEST	Proof of Housing	Unreviewed	7/20/2021	
	Add	MHB	MEN10011	Notreal	TEST	Verifications	Unreviewed	7/20/2021	
	Add	NWHS	MEN10296	RENTER	TEST	Application	Unreviewed	7/27/2021	
	Add	NWHS	MEN10296	RENTER	TEST	Verifications	Unreviewed	7/27/2021	
	Add	NWHS	MEN10296	RENTER	TEST	Photo ID	Unreviewed	7/27/2021	
	Add	NWHS	MEN10296	RENTER	TEST	Other	Unreviewed	7/27/2021	
	Add	NWHS	MEN10312	MOVING	TEST	Verifications	Unreviewed	7/27/2021	

Select All results View Event History Print Event History Delete Favorites

**View Annotations**

**Massachusetts Emergency Housing Payment Assistance Application**

Applicant Name:	Notreal TEST	Applicant #	MEN10011
Language	English	Applicant Type	Property Owner/Landlord: A property owner/landlord, looking to help your tenant cover what they owe you.
SSN	No SSN		
Address	950 Dorchester ave #200, Boston, Massachusetts 02125		
Email	- No email		
Phone	(222) 111-3344 Type Home Consent		
Phone 2	Type	Type	Consent
Mailing			

**Applicant Responses**

Name	Relationship	DOB	Race	Ethnicity	Gender	Income
Notreal TEST	HOH	7/20/2000	American Indian or Alaska Native	Hispanic or Latino	Male	Yes
Type of Income / Other			Frequency	Amount	Annual Income	
Wages/Employment			Daily (every day)	\$1.00	\$365.00	
Self-employment (including contract work like Uber or Lyft)			Weekly (once a week)	\$2.00	\$104.00	



# Viewing Documents / Navigation



# Viewing Documents / Navigation

1. Users can use the Menu at the top of the screen to navigate between screens
2. The search result page with multiple pages (e.g., 1 2 3) will display the page numbers which can be used to navigate to each page by clicking the numerical link.
3. To filter by column information click on the column heading

The screenshot displays the DocuPhase Results interface. At the top, a blue header bar contains the DocuPhase logo, the word "RESULTS", and a "Global Search" input field. Below the header, a green box labeled "1" highlights the "Search" and "Capture" buttons. The main content area shows a filter for "APPLICATION: MASS Central" and a table of results. A green box labeled "3" highlights the "Document Description" column header. The table lists various documents with columns for File, Note, RA, Add, MHB, MEN, ID, First Name, Last Name, Initial, Document Description, Document Status, Document Date, and Member Name. The first row is highlighted in yellow. At the bottom right, a green box labeled "2" highlights the pagination controls, which show "1 2 3 4 5".

**DOCUPHASE RESULTS** Global Search

Search Capture

APPLICATION: MASS Central

**MASS CENTRAL** Order: Member Name ASC Records: 41

<input type="checkbox"/>	File	Note	RA	Add	MHB	MEN	ID	First Name	Last Name	Initial	Document Description	Document Status	Document Date	Member Name
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST					Proof of Crisis	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST					Application	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST					Proof of Ownership	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST					Proof of Housing	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	MHB	MEN10011	Notreal	TEST					Verifications	Unreviewed	7/20/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST					Application	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST					Verifications	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST					Photo ID	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10296	RENTER	TEST					Other	Unreviewed	7/27/2021	
<input type="checkbox"/>		Add	NWHS	MEN10312	MOVING	TEST					Verifications	Unreviewed	7/27/2021	

Select All results View Event History Print Event History Delete Favorites

1 2 3 4 5

# Viewing Documents

Selecting the document from the selection screen on the left opens a viewing screen on the right as shown below.

DocuPhase allows users to see the list of documents on the left-hand side of the screen while opening one file at a time to display on the right-hand side.

The screenshot displays the DocuPhase application interface. On the left, a table lists documents for 'MASS CENTRAL'. The selected document is 'Add MHB MEN10011 Notreal TEST Application Unreviewed 7/20/2021'. On the right, the document is displayed in a form titled 'Massachusetts Emergency Housing Payment Assistance Application'.

**MASS CENTRAL** Sort Order: Member Name ASC **Records: 41**

File	Note	RAA	Applicant ID	First Name	Last Name	Initial	Document Description	Document Status	Document Date	Member Name
<input type="checkbox"/>	Add	MHB	MEN10011	Notreal	TEST		Proof of Crisis	Unreviewed	7/20/2021	
<input checked="" type="checkbox"/>	Add	MHB	MEN10011	Notreal	TEST		Application	Unreviewed	7/20/2021	
<input type="checkbox"/>	Add	MHB	MEN10011	Notreal	TEST		Proof of Ownership	Unreviewed	7/20/2021	
<input type="checkbox"/>	Add	MHB	MEN10011	Notreal	TEST		Proof of Housing	Unreviewed	7/20/2021	
<input type="checkbox"/>	Add	MHB	MEN10011	Notreal	TEST		Verifications	Unreviewed	7/20/2021	
<input type="checkbox"/>	Add	NVHS	MEN10296	RENTER	TEST		Application	Unreviewed	7/27/2021	
<input type="checkbox"/>	Add	NVHS	MEN10296	RENTER	TEST		Verifications	Unreviewed	7/27/2021	
<input type="checkbox"/>	Add	NVHS	MEN10296	RENTER	TEST		Photo ID	Unreviewed	7/27/2021	
<input type="checkbox"/>	Add	NVHS	MEN10296	RENTER	TEST		Other	Unreviewed	7/27/2021	
<input type="checkbox"/>	Add	NVHS	MEN10312	MOVING	TEST		Verifications	Unreviewed	7/27/2021	

**Massachusetts Emergency Housing Payment Assistance Application**

Applicant Name:	Notreal TEST	Applicant #	MEN10011
Language	English	Applicant Type	Property Owner/Landlord: A property owner/landlord, looking to help your tenant cover what they owe you.
SSN	No SSN		
Address	950 Dorchester ave #200, Boston, Massachusetts 02125		
Email	- No email		
Phone	(222) 111-3344	Type	Home Consent
Phone 2	Type	Type	Consent
Mailing			

**Applicant Responses**

Name	Relationship	DOB	Race	Ethnicity	Gender	Income
Notreal TEST	HOH	7/20/2000	American Indian or Alaska Native	Hispanic or Latino	Male	Yes
	Type of Income / Other	Frequency	Amount	Annual Income		
	Wages/Employment	Daily (every day)	\$1.00	\$365.00		
	Self-employment (including contract work like Uber or Lyft)	Weekly (once a week)	\$2.00	\$104.00		



Selecting the document opens the screen to view the document. The document itself can not be edited but it can be annotated (see next section “Editing Documents”)

# Editing Documents





# Taskbar

**View** – allows the user to adjust the view of the document (zoom in, zoom out, rotate left, rotate right, etc.)



**Annotations** – allows the user to highlight, add notes, etc., since the document itself can not be modified (e.g., add a case note to indicate an additional housing crisis description, amend a date or provide case manager name, etc. )



## Taskbar - Annotations



	Tool	Description
1	<b>Rubber Stamps</b>	Overlay a pre-defined stamp-image with current information such as “Approved” and information such as when and/or by whom
2	<b>Highlights</b>	Add emphasis to selected areas using a see-through color overlay
3	<b>Note Annotations</b>	Add comments and emphasis directly to the document
4	<b>Hide &amp; Restore</b>	Make annotations invisible (to see original document) or visible (to see comments and markups)
5	<b>Text</b>	Insert a text box where you may enter text that displays on a page image.
6	<b>Drawing Tools</b>	Insert an arrow, line, rectangle, ellipse, etc.
7	<b>Redactions</b>	Hide areas of an image from view to protect applicant’s information

# Reminders & Resources





## Reminders

- ☒ Do Not delete files from DocuPhase
- ☒ Do Not Search without adding any criteria; it will return too many pages of documents to review
- ☒ Do add notes, highlight, or annotate on files to track staff notes for specific documents
- ☒ Do use application IDs for streamlined searches to return only the files related to the application
- ☒ Do click on column headings to organize search results







## Additional Resources

There are several DocuPhase learning tools available online. The following resource links may be helpful to learn more about DocuPhase and its functionality.

- [Microsoft DocuPhase Support](#)
- [Microsoft DocuPhase Training Videos](#)

## Still have Questions?

Several resources are available to help deepen learning:

1. Resources posted on the [RAA Resource Portal](#) under [Central Application](#)
2. Direct policy and process questions to a supervisor who can contact the RAA support inbox, if necessary, ([dhcdraaraft@mass.gov](mailto:dhcdraaraft@mass.gov)) as a point of escalations for questions.
3. For Central App technical issues, please submit a ticket while logged in to the Central App portal account. Be sure to include as much information as possible (e.g., Application ID).