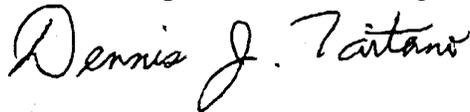


For: State and County Offices

Receivable Imaging System (RIS) Web Retrieval Application

Approved by: Associate Administrator for Operations and Management



1 Overview

A Background

The FSA Receivable Management Office RIS retrieval application allows all authenticated users to query, retrieve, print, e-mail, and view receivable/claims file documents stored in the system. Access is based on the eAuthentication user ID and password provided for State and County Office employees.

The RIS retrieval application provides employees instant access to debt file documents including:

- program contracts
- notification and due process letters
- correspondence with debtors and external collectors (Department of Treasury, Department of Justice, and collection agencies)
- promissory notes
- other documentation pertinent to the debt.

B Purpose

This notice provides:

- an introduction to the RIS retrieval application
- instructions for accessing the RIS retrieval application in the State and County Offices.

C Contact

For technical problems with the application, contact the FSA National Help Desk at 1-800-255-2434.

Disposal Date	Distribution
October 1, 2009	State Offices; State Offices relay to County Offices

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2 RIS Web Retrieval Application Introduction

A RIS Retrieval Application

The RIS retrieval application was developed to make receivable/claim file information easily accessible, and to transition from a labor intensive, paper-oriented system that uses paper folders varying in size from a few pages to several hundred pages.

B State and County Office Employee Access

Employees who want access to the RIS retrieval application **must** register through the USDA eAuthentication registration process at www.eauth.egov.usda.gov and obtain an account with Level 2 access. Employees must have a valid eAuthentication user ID and password. Access privileges must be requested on FSA-13-A. Notice IRM-400 provides information on the FSA computer security registration process.

C Financial Information Available in the RIS Retrieval Application

State and County Office employees can query, retrieve, print, e-mail, and view any domestic and farm program debt file documents residing in the RIS retrieval application that may include financial statements, payoff reports, collection information, etc. Remember, these records may contain PII that **must** be safeguarded.

D Web Site Information Security

The RIS retrieval application uses the USDA eAuthentication process to ensure that the user ID and password are registered through the USDA secured web site. A secured socket layer with a minimum of 128-bit encryption is used to preclude others from accessing the system. This meets the current OMB security requirements.

State and County Office employees are **required** to have a Level 2 eAuthentication user ID and password to log into the RIS retrieval application.

E RIS Retrieval Application Benefits

The RIS retrieval application:

- allows USDA employees faster and more convenient access to domestic and farm program debt information through the Intranet
- eliminates the need to request documents manually
- increases productivity and improves the overall workflow process within State and County Offices
- provides a centralized repository of all scanned and FAXed receivable/claims related documents in 1 convenient location.

3 Using the RIS Retrieval Application

A Accessing the RIS Retrieval Application

Each user's eAuthentication user ID and password:

- identifies the user to the RIS retrieval application
- determines options that the user can perform
- attributes activities performed under users logon to the user.

Users shall **not** share their eAuthentication user ID and password with other employees. If users feel that their security has been compromised, contact the eAuthentication Help Desk to change user's eAuthentication password.

To access the RIS retrieval application, go to the USDA Intranet web site at <http://intranet.fsa.usda.gov/fsa> (users may want to create a bookmark for this location).

Under "Links", CLICK "**FSA Applications**".



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3 Using the RIS Retrieval Application (Continued)

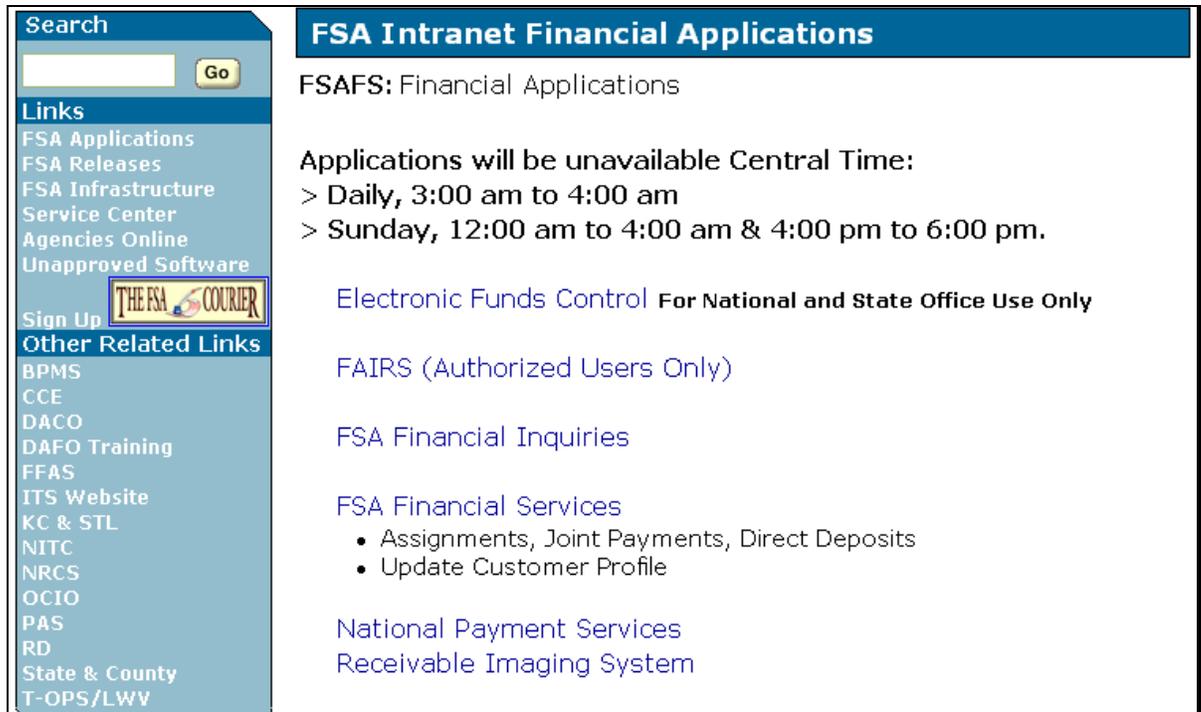
A Accessing the RIS Retrieval Application (Continued)

Under “Financial Services”, CLICK “**Financial Applications**”.



The screenshot shows the FSA Intranet Financial Applications page. On the left, there is a navigation menu with the following items: RD, State & County, T-OPS/LWV, Administrative Applications, Financial Services, Rates and Fact Sheets, and Production Adjustr & Disaster Program. The Administrative Applications section is expanded, showing a list of links: COC Elections, COC State AO Reports, COE Replacement, ERSR, Directive Tools, OIP - Office Information Profile, and Financial Applications. The Financial Services section is also expanded, showing a link to Financial Applications. The Production Adjustr & Disaster Program section is also expanded, showing a link to Financial Applications.

CLICK “**Receivable Imaging System**”.



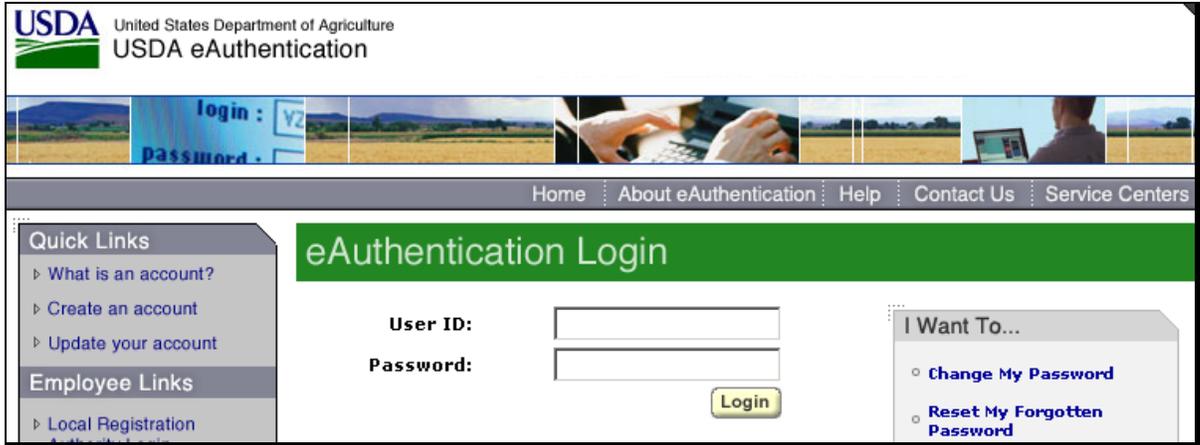
The screenshot shows the FSA Intranet Financial Applications page. On the left, there is a navigation menu with the following items: Search, Links, FSA Applications, FSA Releases, FSA Infrastructure, Service Center, Agencies Online, Unapproved Software, Sign Up, Other Related Links, BPMS, CCE, DACO, DAFO Training, FFAS, ITS Website, KC & STL, NITC, NRCS, OCIO, PAS, RD, State & County, and T-OPS/LWV. The main content area is titled “FSA Intranet Financial Applications” and contains the following text: FSAFS: Financial Applications, Applications will be unavailable Central Time: > Daily, 3:00 am to 4:00 am, > Sunday, 12:00 am to 4:00 am & 4:00 pm to 6:00 pm. Below this, there are several links: Electronic Funds Control For National and State Office Use Only, FAIRS (Authorized Users Only), FSA Financial Inquiries, FSA Financial Services (with sub-links: Assignments, Joint Payments, Direct Deposits, Update Customer Profile), National Payment Services, and Receivable Imaging System.

The eAuthentication Warning Screen will be displayed, CLICK “**I Agree**”.

3 Using the RIS Retrieval Application (Continued)

A Accessing the RIS Retrieval Application (Continued)

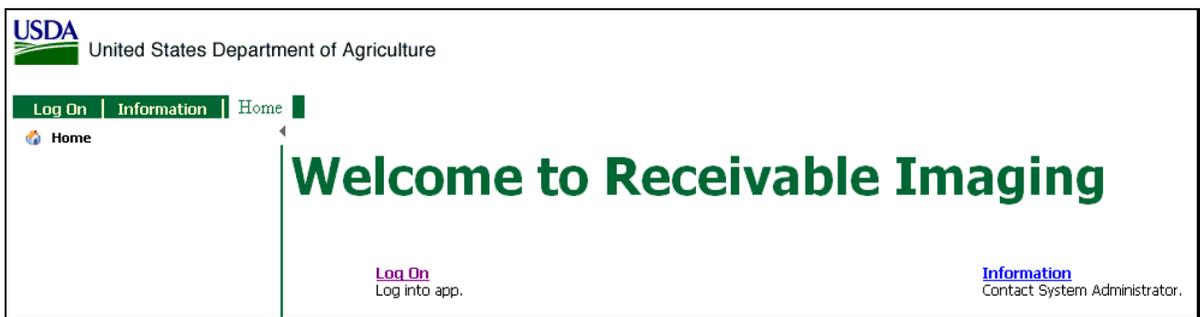
Enter eAuthentication user ID and password and CLICK “Login”.



The “Security Alert” dialog box will be displayed, CLICK “Yes”.



The Welcome to Receivable Imaging Screen will be displayed, CLICK “Log On”.



3 Using the RIS Retrieval Application (Continued)

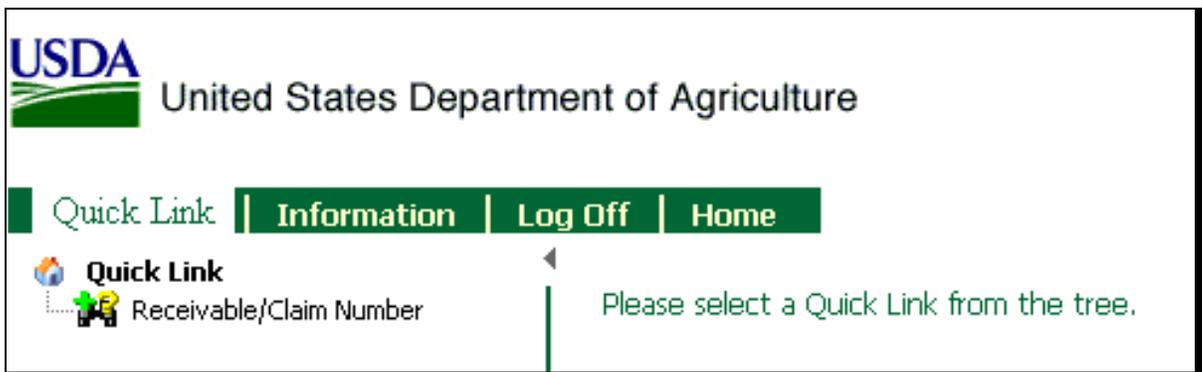
A Accessing the RIS Retrieval Application (Continued)

The Welcome to Receivable Imaging Screen will be redisplayed, CLICK “Quick Link” to begin a document search.



B Document Searches

To begin a document search, under “Quick Link”, CLICK “Receivable/Claim Number”.



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3 Using the RIS Retrieval Application (Continued)

B Document Searches (Continued)

On the Fill in Data for Receivable/Claim Number Screen, in the “Criteria” box, enter the appropriate receivable/claim document number and CLICK “Search”.

Note: The receivable/claim number is a 12-digit number, as follows.

Digit	Content
1, 2	Agency code (10 for CCC or 20 for FSA).
3, 4	State code.
5-7	County code.
8-12	Assigned receivable/claim number.

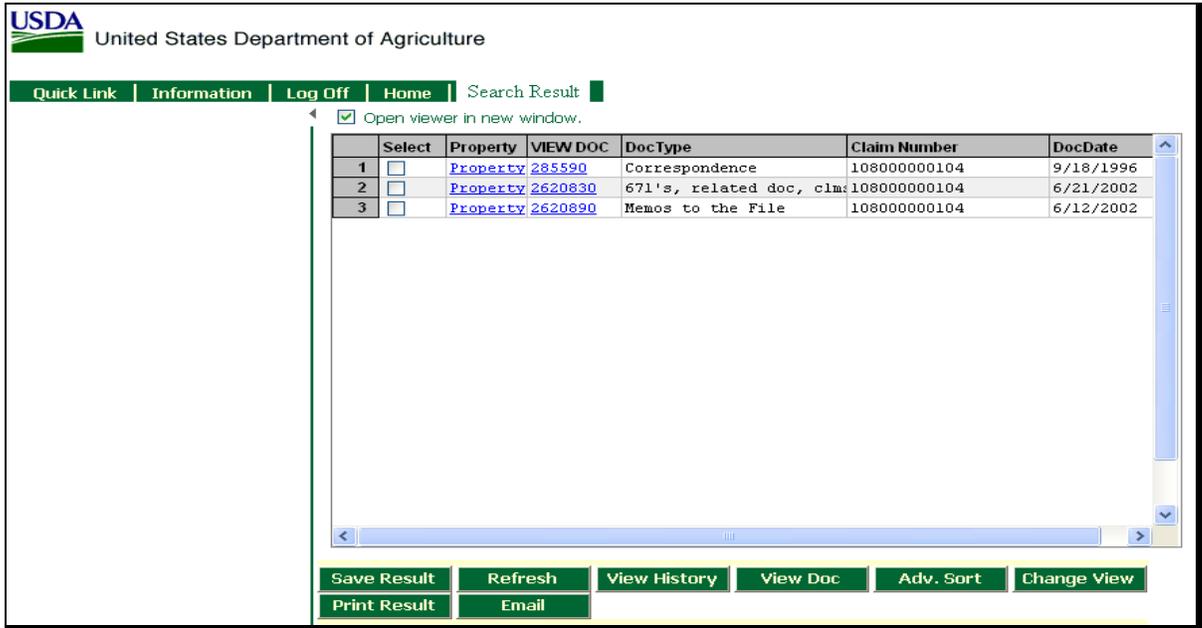
Example: For Adams County, Illinois, CCC claim number 1, the 12-digit number would be 10170010001, as follows.

<u>Agency Code</u>	<u>State Code</u>	<u>County Code</u>	<u>Receivable/Claim Number</u>
10	17	001	00001

3 Using the RIS Retrieval Application (Continued)

C Working with the Query Results Screen

The Search Result Screen will be displayed with a grid of documents that matched the query request. Each column represents an index value.



Note: The “Open viewer in new window” box defaults to checked (✓), to open selected documents in a **separate** window. If users uncheck the box, the viewer will open in the **current** window. Most users leave the “Open viewer in new window” box checked (✓) to switch back and forth between the list of documents and the documents in the viewer.

3 Using the RIS Retrieval Application (Continued)

D Search Result Screen Tools

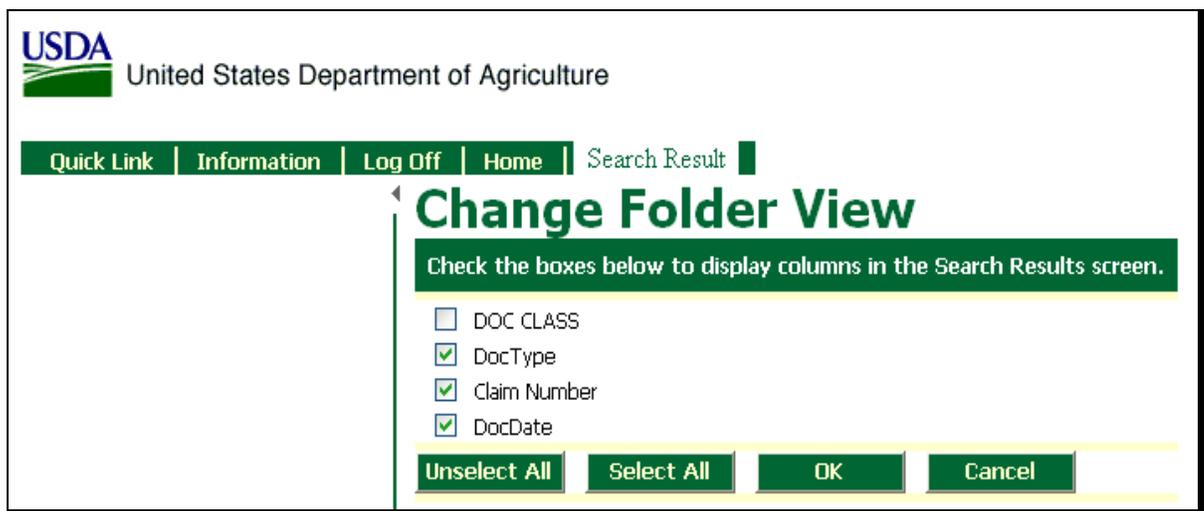
On the Search Result Screen, at the bottom of the grid that will be displayed, are tools to use when working with documents in the grid. The following describes each of the Search Result Screen grid tools.

Tool	Function
Save Result	Save the results of user’s query to a file.
Refresh	Updates the currently displayed Search Result Screen grid (also known as “reloading” Web pages).
View History	Views the history of actions taken on 1 or more documents.
View Doc	Opens a document viewer so that user can view documents 1-by-1, in separate windows, or as a group within the same window. The viewer provides controls to manipulate documents once opened.
Adv. Sort	Allows user to sort ascending or descending on document types.
Change View	Customizes which columns will be displayed in the Search Result Screen grid.
Print Result	Prints the list of documents in the grid.
Email	E-mails selected documents.

To return to the Fill-In Data for the Receivable/Claim Number Screen, CLICK “Quick Link”.

E Change View Tool

When working with documents that have many columns, use the Change View tool to make it easier to view specific columns of interest. To change columns displayed on the Search Result Screen grid, CLICK “Change View”. The Change Folder View Screen will be displayed.



3 Using the RIS Retrieval Application (Continued)

E Change View Tool (Continued)

Users can check (✓):

- 1 box at a time for the column of information to be displayed
- “Unselect All” to de-selects all columns
- “Select All” to select all columns
- “Cancel” to return to Search Result Screen grid.

Note: If a query provides a lot of columns and user only wants 1 or 2 to be displayed, it may be faster to “Unselect All” and then check (✓) the columns user wants to be displayed.

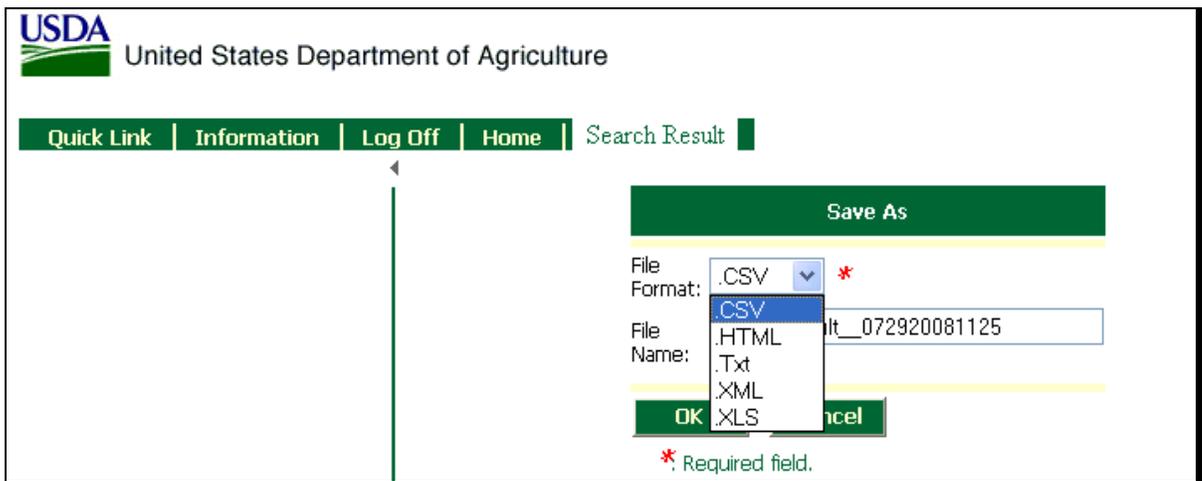
When selections have been made, CLICK “OK” to save.

F Save Results Tool (Optional)

The Save Results tool **only** allows the user to see what document types are in the receivable/claim file from the query result grid. The Save Results tool does **not** allow the user to view the documents when the results are saved to any of the file formats. It is **not** necessary to save results to view the file later.

Use the Save Results tool to save query results in CSV, HTML, TXT, or XML format. Users may save all query results or just the results selected.

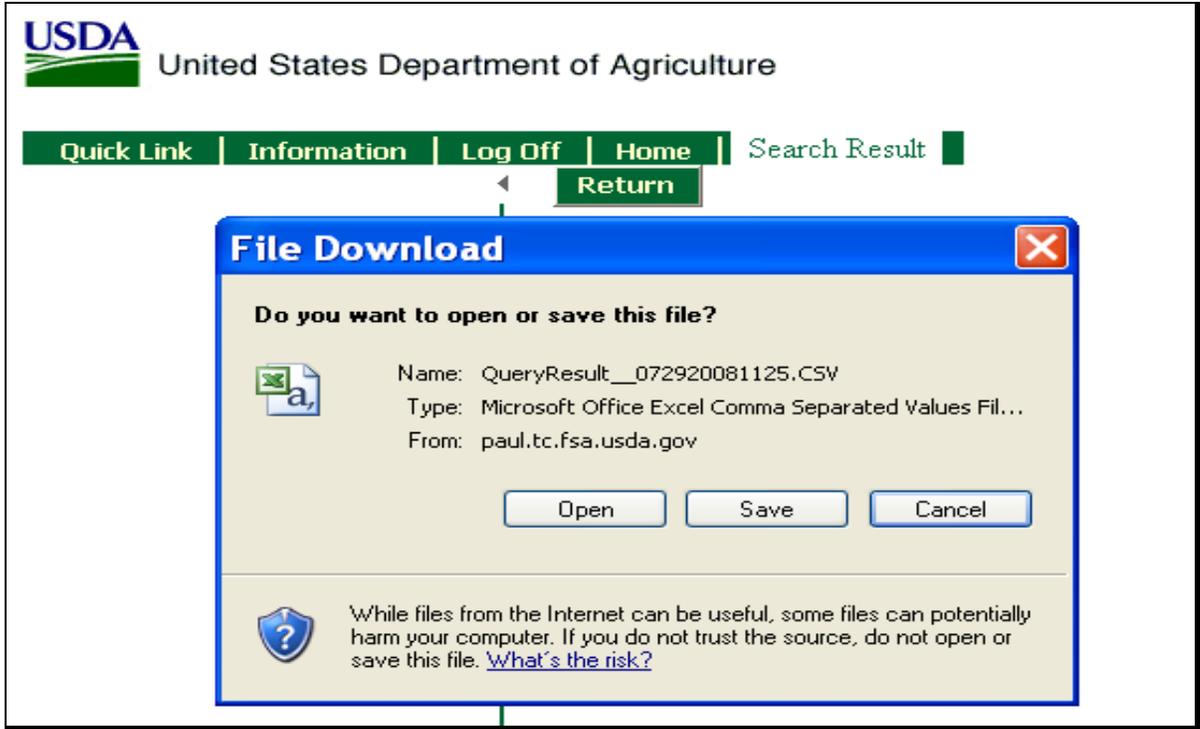
To save query results to a report, from the Search Result Screen grid, under “Select”, check (✓) the document user wants to save. The “Save As” dialog box will be displayed. From the “File Format” drop-down menu, highlight the format the user wants the documents saved in and CLICK “OK”.



3 Using the RIS Retrieval Application (Continued)

F Save Results Tool (Optional) (Continued)

Depending on user's browser settings, the "File Download" dialog box may be displayed.

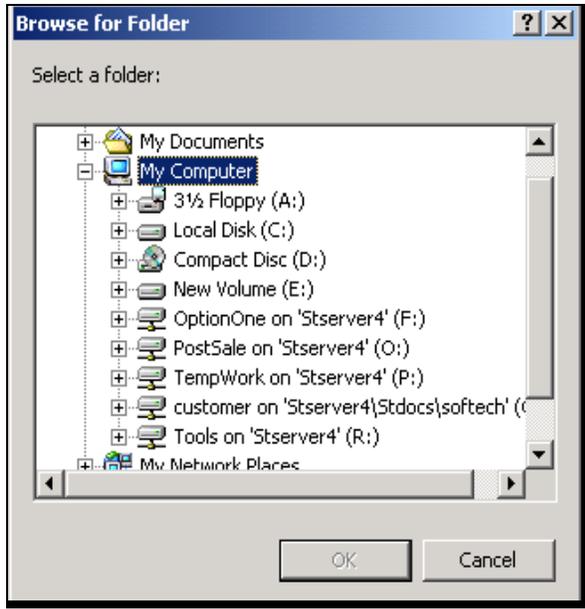


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3 Using the RIS Retrieval Application (Continued)

F Save Results Tool (Optional) (Continued)

If the “File Download” dialog box is displayed, follow this table.

If users CLICK...	THEN the...
“Open”	query results will be displayed in the format selected.
“Save”	<p data-bbox="581 478 1198 510">Browse for Folder dialog box will be displayed.</p> <div data-bbox="581 541 1166 1150"></div> <p data-bbox="581 1188 1430 1220">Navigate to users preferred download location and CLICK “OK”.</p> <p data-bbox="581 1262 1386 1325">Note: The file may be stored on any local or network drive to which user has access.</p>

3 Using the RIS Retrieval Application (Continued)

F Save Results Tool (Optional) (Continued)

If users CLICK...	THEN the...
<p>“Save” (Continued)</p>	<p>following “Download Complete” dialog box will be displayed when the results have been successfully saved.</p> <div data-bbox="581 468 1430 1058" style="border: 1px solid black; padding: 5px;"> </div> <p>CLICK:</p> <ul style="list-style-type: none"> • “Open” to open the file • “Close” and the Search Result Screen will be displayed.

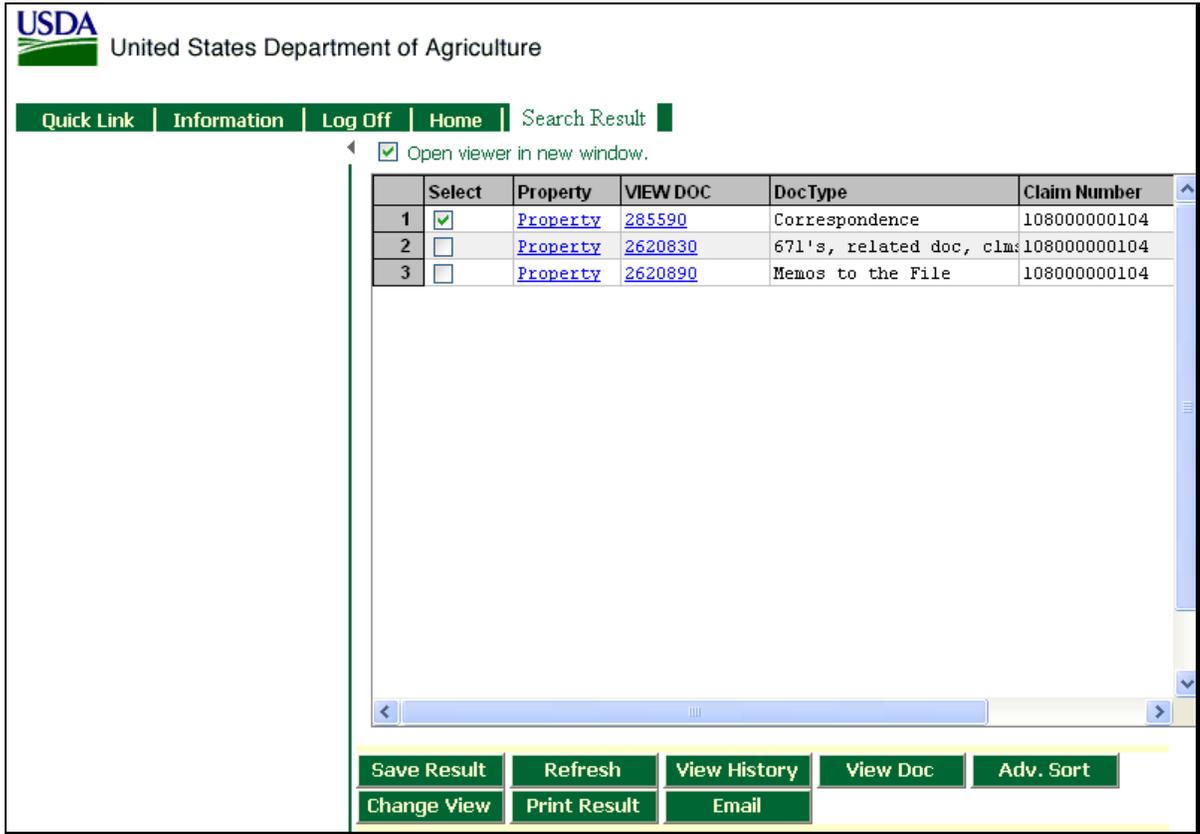
G Refresh

The Refresh tool updates the currently displayed Web page.

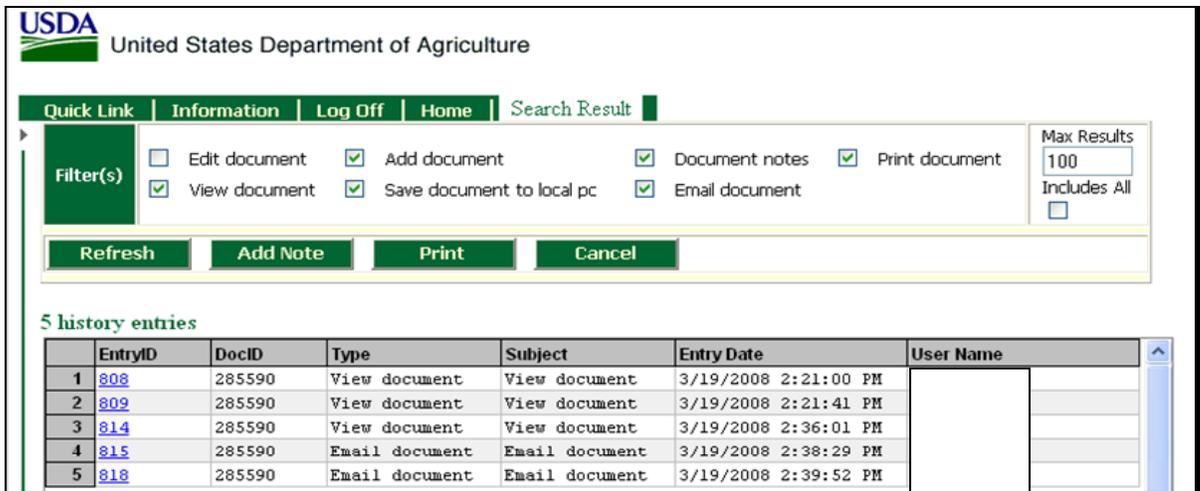
3 Using the RIS Retrieval Application (Continued)

H View History Tool

The View History tool allows the user to view the history of any actions taken on 1 or more documents. From the Search Result Screen, under “Select”, check (✓) 1 or more documents and CLICK “View History”.



The history entries will be displayed for the documents selected, with the type of action taken, entry date, and user name included in data displayed.

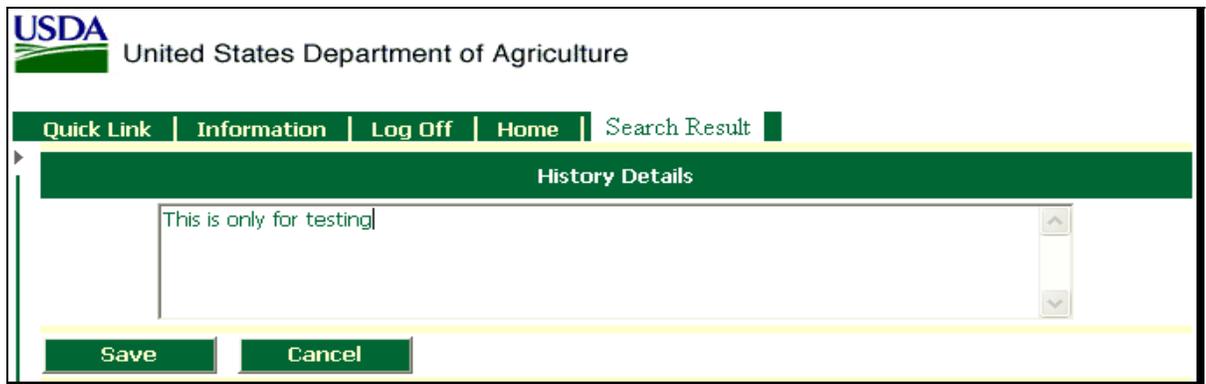


3 Using the RIS Retrieval Application (Continued)

H View History Tool (Continued)

CLICK:

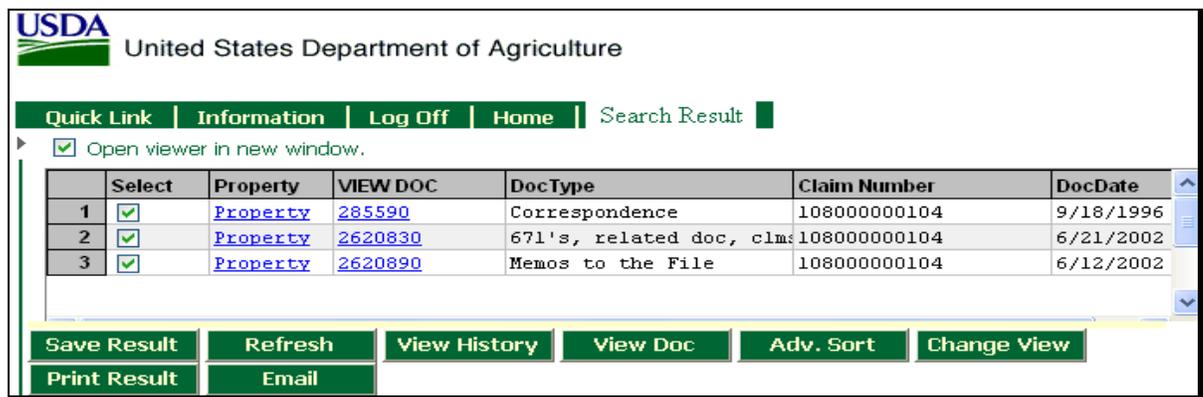
- “Refresh” to update the currently displayed Web page
- “Add Note” to add a note to the history; type comments in the space provided on the History Details Screen, CLICK “Save” and the view history entries will be redisplayed



- “Print” to print the selected list
- “Cancel” to return to the “View History” entries.

I Return to Query Screen

To return to the Query Screen, CLICK “Quick Link”.



3 Using the RIS Retrieval Application (Continued)

I Return to Query Screen (Continued)

If users CLICK “**Receivable/Claim Number**”, the Search Query Screen will be redisplayed and users can begin a new search.



J View Doc Tool

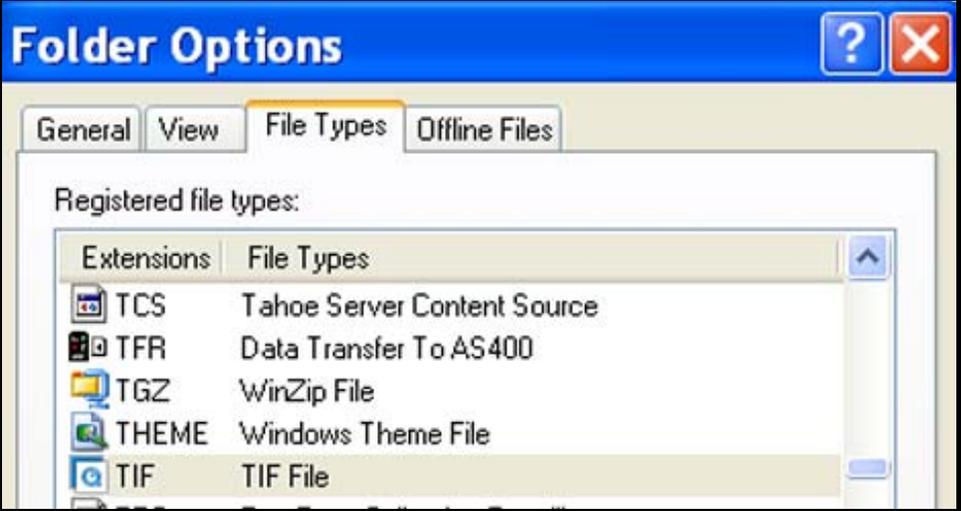
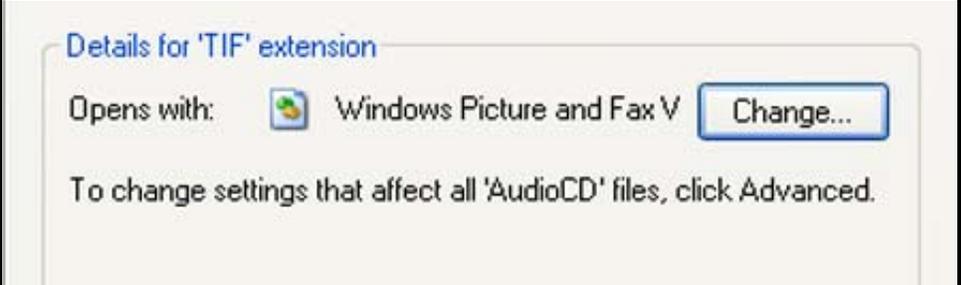
Before users can view documents, users need to check their viewer setting to associate a file name extension with the “TIF” file type.

Note: All image documents are in TIF format.

Step	Action
1	<p>From PC Desktop, CLICK “start”, “Control Panel”, and “Folder Options”.</p>

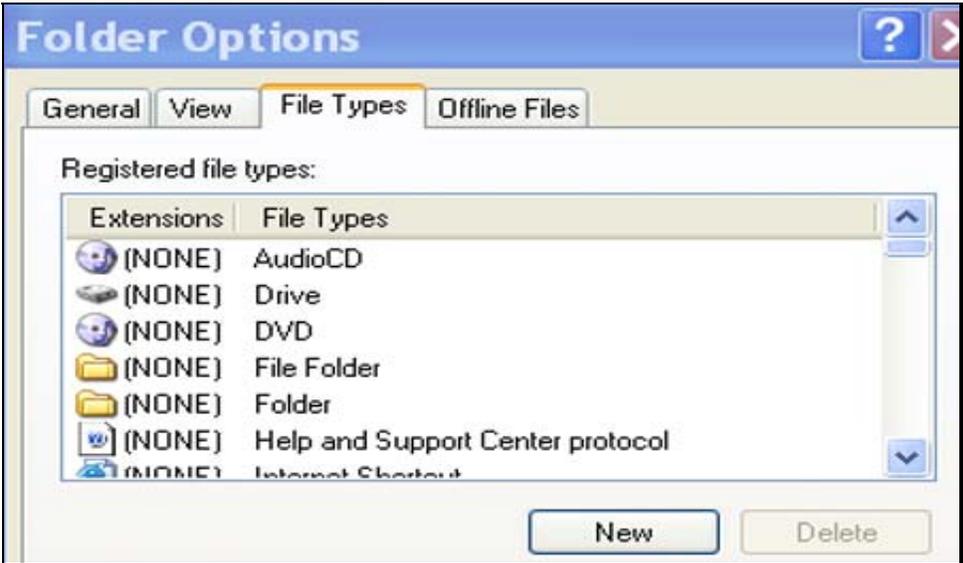
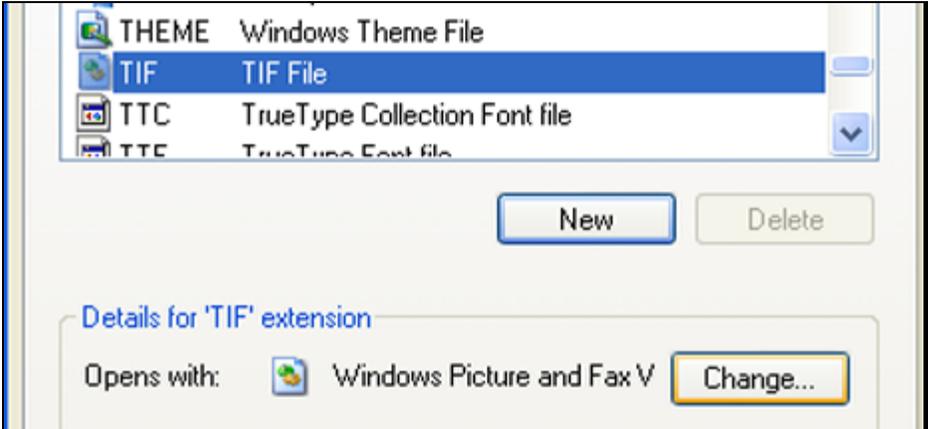
3 Using the RIS Retrieval Application (Continued)

J View Doc Tool (Continued)

Step	Action
2	<p>Folder Options dialog box will be displayed; CLICK “File Types” tab.</p>  <p>The screenshot shows the 'Folder Options' dialog box with the 'File Types' tab selected. The 'Tasks' section is visible, with 'Show common tasks in folders' selected.</p>
3	<p>Scroll down list of Extensions and highlight “TIF”.</p> <p>Note: If “TIF” is not displayed, skip to step 5.</p>  <p>The screenshot shows the 'Folder Options' dialog box with the 'File Types' tab selected. The 'Registered file types' list is visible, with the 'TIF' extension highlighted.</p>
4	<p>CLICK “Change”. Skip to step 9.</p>  <p>The screenshot shows the 'Details for TIF extension' dialog box. The 'Opens with' section shows 'Windows Picture and Fax V' and the 'Change...' button is highlighted.</p>

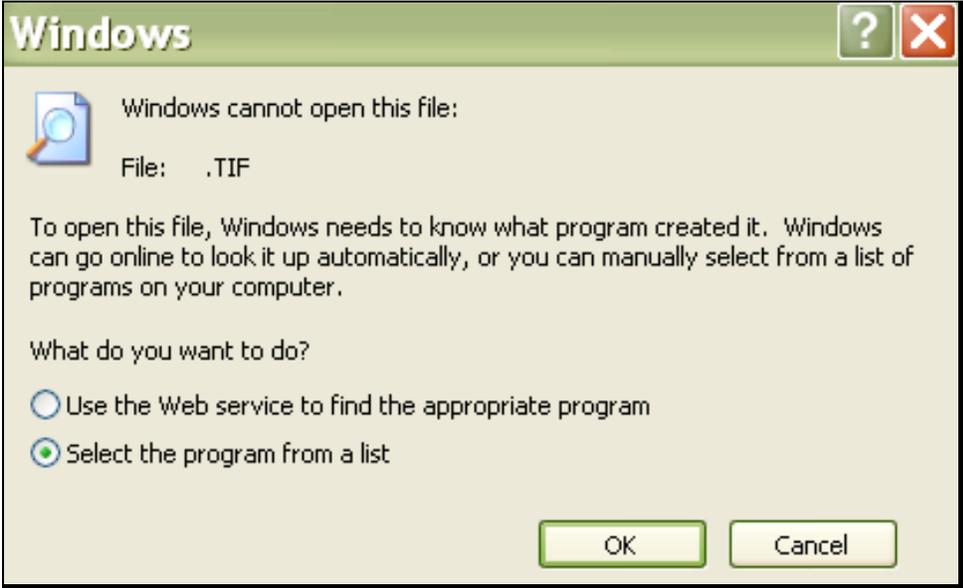
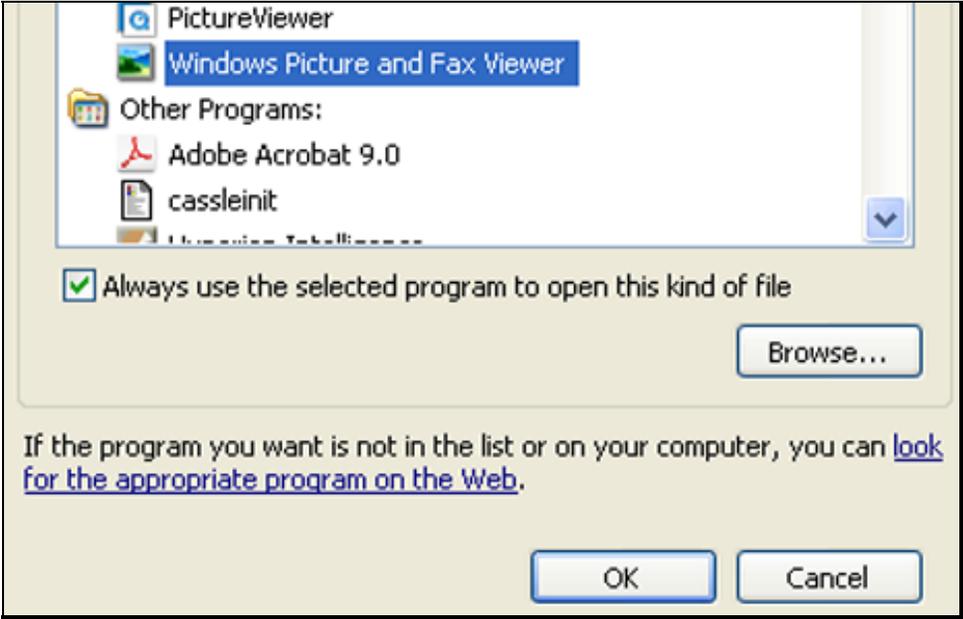
3 Using the RIS Retrieval Application (Continued)

J View Doc Tool (Continued)

Step	Action
5	<p>If “TIF” extension does not exist, CLICK “New”.</p> 
6	<p>TYPE, “TIF” and CLICK “OK”.</p> 
7	<p>With “TIF” file type highlighted, CLICK “Change”.</p> 

3 Using the RIS Retrieval Application (Continued)

J View Doc Tool (Continued)

Step	Action
8	<p>CLICK “Select the program from a list” and CLICK “OK”.</p> 
9	<p>CLICK “Windows Picture and Fax Viewer”, CLICK “OK”, and CLICK “Close”.</p> 

3 Using the RIS Retrieval Application (Continued)

J View Doc Tool (Continued)

From the Search Result Screen, use either of the following ways to view a document.

- Under “VIEW DOC” column, click the applicable document’s ID.
- Under “Select” column, check (✓) the box next to the applicable document and CLICK “View Doc”.

The screenshot displays the USDA United States Department of Agriculture interface. At the top, there is a navigation bar with links: Quick Link, Information, Log Off, Home, and Search Result. Below the navigation bar, there is a checkbox labeled "Open viewer in new window." which is checked. The main content area features a table with the following columns: Select, Property, VIEW DOC, DocType, Claim Number, and DocDate. The table contains three rows of data. Below the table, there is a row of action buttons: Save Result, Refresh, View History, View Doc, Adv. Sort, and Change View. A second row of buttons includes Print Result and Email.

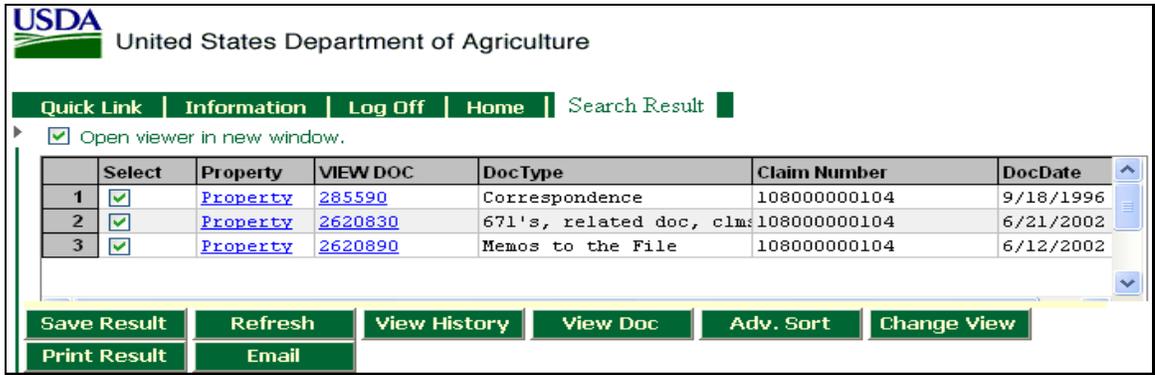
	Select	Property	VIEW DOC	DocType	Claim Number	DocDate
1	<input checked="" type="checkbox"/>	Property	285590	Correspondence	108000000104	9/18/1996
2	<input type="checkbox"/>	Property	2620830	671's, related doc, clms	108000000104	6/21/2002
3	<input type="checkbox"/>	Property	2620890	Memos to the File	108000000104	6/12/2002

3 Using the RIS Retrieval Application (Continued)

K Print Result Tool

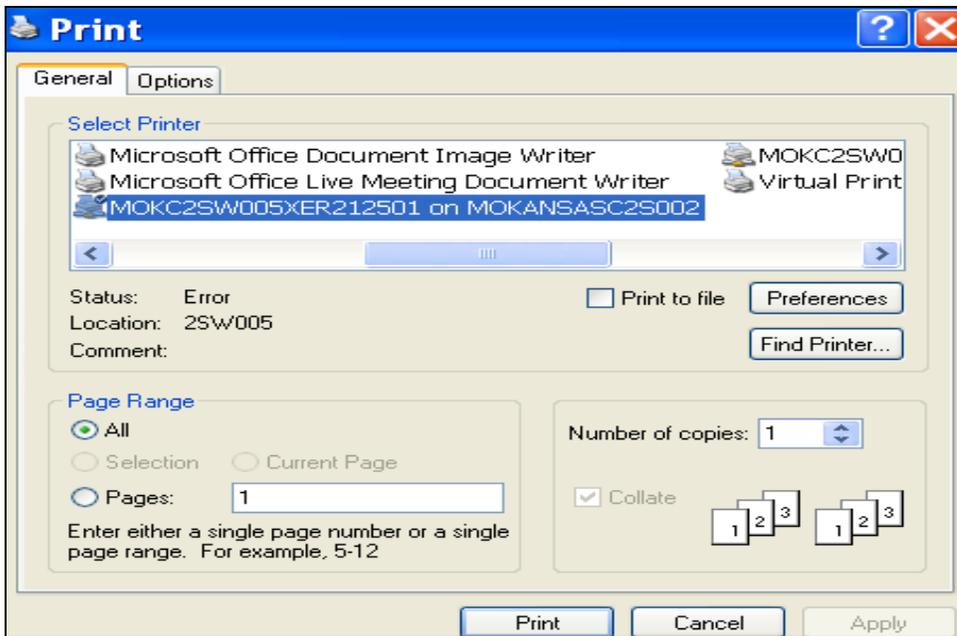
To use the Print Result tool, under “VIEW DOC” column, click the applicable document’s ID and CLICK “Print Result”. Users can print a single document from the viewer; if user has multiple documents selected in the viewer, the current document will be printed.

Note: Users should **only** use the Print Result tool when absolutely **necessary**. These documents may contain PII and **must** be safeguarded.



The “Print” dialog box will be displayed. To print a document, in the:

- “Select Printer” section, select the desired printer
- “Page Range” section, specify pages to print; all pages is the default
- enter the number of copies
- CLICK “Print”.



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3 Using the RIS Retrieval Application (Continued)

L Email Tool

Use the Email tool to e-mail 1 or more documents. From the Search Result Screen grid, under the “Select” column, check (✓) 1 or more documents. After selecting applicable documents, CLICK “**Email**”.

USDA United States Department of Agriculture

Quick Link | Information | Log Off | Home | Search Result

Open viewer in new window.

	Select	Property	VIEW DOC	DocType	Claim Number
1	<input checked="" type="checkbox"/>	Property	285590	Correspondence	108000000104
2	<input type="checkbox"/>	Property	2620830	671's, related doc, clm	108000000104
3	<input type="checkbox"/>	Property	2620890	Memos to the File	108000000104

Save Result Refresh View History View Doc Adv. Sort

Change View Print Result Email

3 Using the RIS Retrieval Application (Continued)

L Email Tool (Continued)

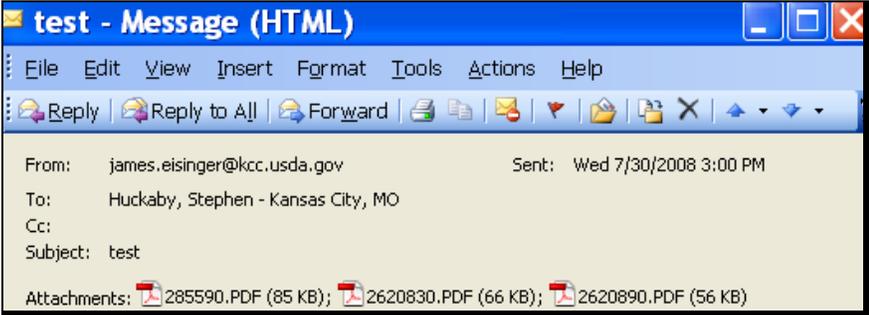
The following is an example of the Email Screen.

From the Email Screen, users can send documents as either links or attachments. Send links or attachments according to the following.

If sending e-mail with...	THEN after entering e-mail addresses, subject, and message, CLICK...
a link	<p>“Send Results as Link” and “Send”. Recipients will receive an e-mail message as follows.</p> <div data-bbox="527 1348 1461 1680" style="border: 1px solid black; padding: 5px;"> <p>To: <input type="text"/></p> <p>Cc:</p> <p>Subject: test</p> <p>Click this LINK to retrieve your attached documents. NOTE: After clicking the link you must enter your RecDocMgmtSystem logon information to retrieve the attached documents.</p> </div> <p>The “RecDocMgmt System logon information” is the recipient’s eAuthentication user ID and password. If recipients do not have access to RIS, the link will not be viewable.</p>

3 Using the RIS Retrieval Application (Continued)

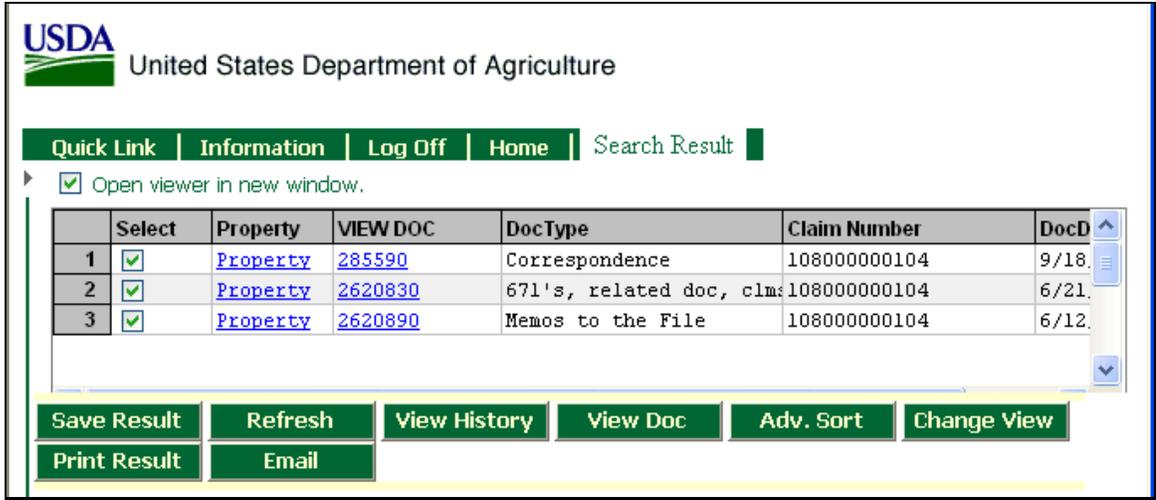
L Email Tool (Continued)

<p>If sending e-mail with...</p>	<p>THEN after entering e-mail addresses, subject, and message, CLICK...</p>
<p>attachments</p>	<p>“Send Document Images as Attachments” and “Send”. The “Choose Image Output Format” dialog box will be displayed. Check (✓) either “As PDF” or “As Tiff” and CLICK “OK”.</p>  <p>The Microsoft Internet Explorer dialog box will be displayed, CLICK “OK”.</p>  <p>The recipient will receive an e-mail with files attached.</p>  <p>Recipients can click on the attachment icon to view the documents.</p>

3 Using the RIS Retrieval Application (Continued)

M Adv. Sort Tool

The Adv. Sort tool allows the user to select how items are displayed on the grid.



CLICK “**Adv. Sort**” and the Advance Sort Screen will be displayed. CLICK “**Sort by**” drop-down menu and scroll to sort by:

- claim number
- document class
- document date
- document type.

CHECK (✓) “**Ascending**” or “**Descending**”, as applicable, and CLICK “**OK**”. Documents will be sorted based on users selection. If users CLICK “**Cancel**”, the Search Result Screen will be redisplayed.

