



# Remote Eligibility Staff Guide

## Overview

This procedure provides WIOA agency staff with information on how to:

- retrieve customer login information for self-registration,
- find documents uploaded by customers and attach them to WIOA applications, and
- upload additional documents to the client’s profile.

## Login Retrieval

Many customers are already in Career Connect because their information converted over from IWDS. If the customer is already in Career Connect with the correct Social Security Number (SSN), then the customer will not be able to create a new account.

Agency staff can help the customer access his/her existing account as follows.

### Step 1: Finding the Client

To determine if the customer is already in Career Connect:

- Use the left-hand menu to go to Manage Individuals > Assist an Individual.
- On the search screen, type in the customer’s first initial, last initial and last 4 of their SSN.
- Click “Search”.

## General Criteria

<b>Individual Username:</b>	<input type="text"/>
<b>Individual User ID:</b>	<input type="text"/>
	<input type="radio"/> Starts with these #s
	<input checked="" type="radio"/> Matches exactly
<b>State ID Number:</b>	<input type="text"/>
<b>First Name:</b>	<input type="text" value="D"/>
<b>Last Name:</b>	<input type="text" value="D"/>
<b>SSN (last 4 digits):</b>	<input type="text" value="9999"/>
<b>SSN (full number):</b>	<input type="text"/> Example: 999999999

If the customer is in Career Connect, with the correct SSN, then proceed with the steps below. **If there is another customer in the system with the same full SSN, please contact the Career Connect Help Desk for assistance.**

### Step 2: Confirming Date of Birth

Customers will be asked to verify their SSN and Date of Birth when logging in for the first time. If the date of birth incorrect (but the SSN and name are correct) let the customer know what the DOB is in the system, have them use that DOB on initial login, and ask them to update it once they login.

Alternatively send a ticket to the Help Desk asking for a DOB correction. Please include:

- Customer name
- Customer State ID # (can be found on the individual search results screen or in Staff Profile > Case Management Profile > Case Summary)
- Correct date of birth (you do NOT need to attach proof of DOB)

### Step 3: Login name & Password Reset

Once the customer's SSN and correct date of birth have been confirmed in Career Connect, the customer will need 2 pieces of information to log in:

- Login name (user name)
- Temporary Password

This information is in the Personal Profile (My Individual Profiles > Personal Profile > General Information)

- **Login Name:** The login name can be found in the "Login Information" section of the General Information.

## Login Information

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**Login Name:**

YTEST01 [Change User Name](#)

- **Temporary Password**

- You will need to change the customer’s password to the temporary password
- Just below the Login Name, click the “Change Password” link.
- A pop-up box will open where you can reset the password.

**Reset the password to (case sensitive): Password1@**

- This will ensure that the customer must change his/her password when he/she logs in.
- Type in the password twice and click “Update Password”.

The screenshot displays the 'Change Password' interface for user YTEST01. On the left, the 'Login Information' section includes fields for First Name, Middle Initial, Last Name, and Alias. Below this, the 'Login Name' is YTEST01 with a 'Change User Name' link. The 'Password' field is highlighted in yellow and contains the text 'Change\_password'. A 'Security Question' dropdown is set to 'What is your all-time favorite sports team?'. The main content area is titled 'Change password for YTEST01' and contains two password input fields: '\* New Password:' and '\* Confirm New Password:'. A password strength indicator below the first field states: 'Enter Password (8 - 20 characters, and must include at least one uppercase letter, one lowercase letter, one number and one special character. Allowable characters are # @ \$ % ^ . ! \* \_ +)'. At the bottom right, there are 'Update Password' and 'Cancel' buttons. The page title is 'Career Connect - Change Password - Google Chrome' and the URL is 'uat-app-vos17000031-v20.geosolinc.com/vosnet/ChangePassword.aspx?1'.

### Informing Customer

- Provide the customer with his/her login name and the temporary password and the Career Connect site link.
- The customer will be asked to confirm his/her SSN and DOB upon login and will be prompted to change the password.

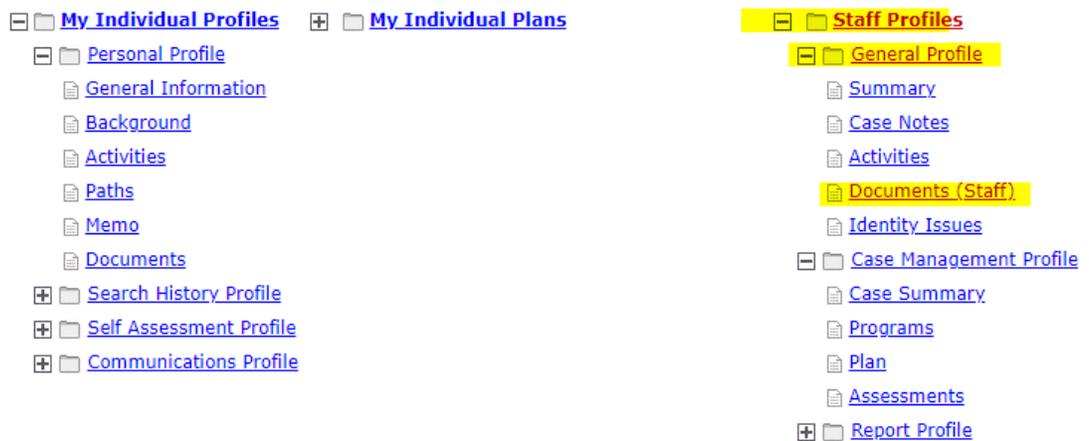
## Finding and Linking Uploaded Documents

### Locating Uploaded Documents

The Documents (Staff) screen lets staff see and manage documents that are scanned and uploaded for an individual, including those that the individual added and those that staff added. Although staff can also see documents in the under the My Individual Profile section, to have full functionality staff should access documents via the Documents (Staff) tab.

Access the Documents (Staff) screen via the top menu in *Staff Profiles > General Profile > Documents (Staff)*

[ [Assist an individual](#) | [Staff Services](#) | [Individual Portfolio](#) ]



## Reviewing Documents

To view uploaded documents:

- Check the “View Thumbnails” box for a preview (not all document types will display in the preview).
- To expand the preview, hold your cursor over the image.
- You can also click the “Review” link in the “Action” column to open a view of the document in a new window.

### Important Note about “View” versus “Review”:

- Clicking “View” will result in a message indicating that you do not have rights to “View”. This is a security measure. You must use the “Review” link to view.
- If you are looking at documents in the Individual Profile section, you will not have access to “Review”. Switch over to the Documents (Staff) screen as explained above.]

## Documents Available

Listed below are the documents available on the selected Individual. Click the View link below to view that particular item.

[Show Filter Options \(Showing all records\)](#)

Results View: [Summary](#) | [Detailed](#)

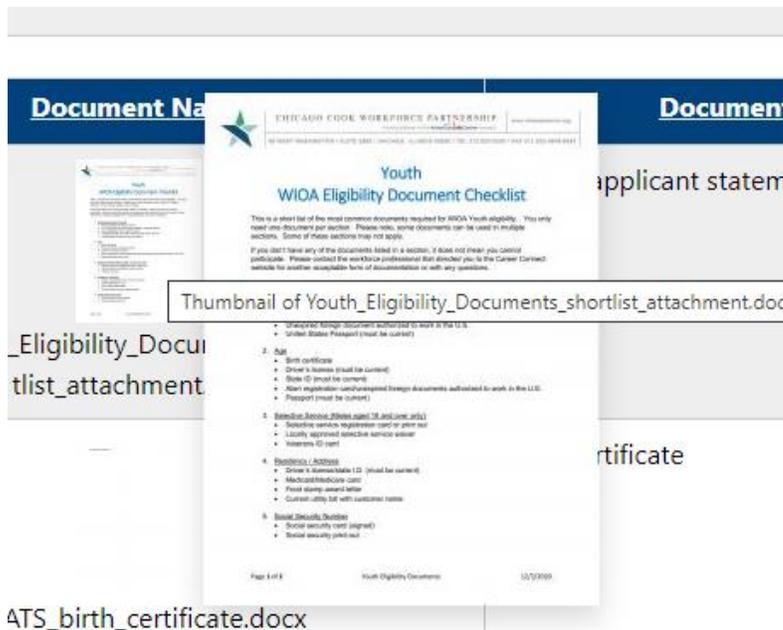
Click a column title to sort.

View Thumbnails

[ Top | [Filter Criteria](#) | Bottom ]

Document Name	Document Tags	Category	Modify Date	Expiration Date	Action
 TEGL_21-16_-_Third_Workforce_Innovation_and_Opportunity_Act_(WIOA)_Title_I_Youth_Formula_Program_Guidance.pdf	Test pdf	General	10/26/2021 12:22		<a href="#">View</a> <a href="#">Review</a> <a href="#">Edit</a> <a href="#">Download</a> <a href="#">Meta Data</a> <a href="#">Delete</a>
 Email_Signature_1_(2).docx	Test with tag	Verification	10/26/2021 11:41		<a href="#">View</a> <a href="#">Review</a> <a href="#">Edit</a> <a href="#">Download</a> <a href="#">Meta Data</a> <a href="#">Delete</a>

Hover over the thumbnail to see a larger image:



## Linking Documents to WIOA Application

Once you've confirmed that the uploaded documents are accurate and legible, you can link them to the verification items in the WIOA Application.

- Expand the "verify" options for the item that you're verifying and select the appropriate option.
- Click the "Link" option to open a pop-up window.

## Demographic Information

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\* **Date of Birth:**

01/23/1985

[Edit Date Of Birth](#)

\* **Verify:**

[ [Verify](#) | [Scan](#) | [Upload](#) | [Link](#) ]

✓ Driver's License

### Date of Birth Verification

- Baptismal Record with Date of Birth
- Birth Certificate
- DD-214 / Report of Transfer or Discharge with Date of Birth
- Driver's License
- IL State ID card or other Federal, State or Local Government issued ID Card
- Hospital Birth Record
- Passport

- In the "Document Description" select the most applicable option. If no option is applicable, select "Other".
- In the "Document Tags" type in the name of the document and what it's verifying (see example below).
- Type in the date you received the document. If it's left blank the system will use today's date.
- If you check the "Document Expires" check box, a link will open to enter the expiration date. (This is not required but is a nice feature for things like Driver's License.)

**Document Information**

**Document Description:**

\* **Document Tags:** Do not enter Personal Identifiable Information (PII) into this field.  
Keywords that will be indexed with this attachment.

**Date Received:**

**Document Expires:**   
**Expiration Date:**

- Scroll down in the pop-up window to select the document.
- Then scroll down and click “Link Document”

## Documents Available

Listed below are the documents available on the selected Individual for linking. If you see a document that matches your specified criteria, choose it from the *Select* column below and click the *Link Document* button.

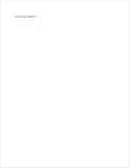
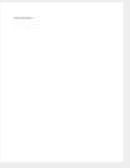
[+ Show Filter Options \(Showing all records\)](#)

Results View: **Summary** | [Detailed](#)

Click a column title to sort.

View Thumbnails

[ [Top](#) | [Filter Criteria](#) | [Bottom](#) ]

Select	Document Name	Document Tags	Category	Modify Date	Expiration Date	
<input type="radio"/>	 PCATS_birth_certificate.docx	Pcat birth certificate	General	12/03/2020 02:50		<a href="#">View</a> <a href="#">Edit</a> <a href="#">Metadata</a>
<input checked="" type="radio"/>	 PCats_Driver_license.docx	pcat drivers license	General	12/03/2020 02:52		<a href="#">View</a> <a href="#">Edit</a> <a href="#">Metadata</a>

 This document strongly matches the initial document association information.

 This document moderately matches the initial document association information.

 This document loosely matches the initial document association information.

[ [Top](#) | [Filter Criteria](#) | [Bottom](#) ]

**Link Document**

- The “Verify” item in the WIOA application will be updated as shown below.
- If a document was attached in error, submit a request to the Help Desk to have it removed/unlinked from the verify. (Please include the client’s name, state ID #, and the field that was verified/linked incorrectly.)

\* **Date of Birth:**  [Edit Date Of Birth](#)

\* **Verify:** [\[ Verify | Scan | Upload | Link \]](#)  
 Driver's License  
 [Driver's License \(application/vnd.openxmlformats-officedocument.wordprocessingml.document\)](#) [\[remove\]](#)

- In the Staff Documents screen, the document category will display as “Verification”.

### Documents Available

Listed below are the documents available on the selected individual. Click the View link below to view that particular item.

[Show Filter Options \(Showing all records\)](#)

Results View: [Summary](#) | [Detailed](#)

Click a column title to sort.

View Thumbnails

[\[ Top | Filter Criteria | Bottom \]](#)

Document Name	Document Tags	Category	Modify Date	Expiration Date	Action
 PCats_Driver_license.docx	Driver's License - Date of Birth	Verification	12/03/2020 05:43		<a href="#">View</a> <a href="#">Review</a> <a href="#">Edit</a> <a href="#">Download</a> <a href="#">Meta Data</a> <a href="#">Delete</a>

- To view all documents linked to the application, click on the check box icon (next to the print application icon).
- This will also show you which documents may be missing.

Title I - Workforce Development (WIOA) Apps: 1

[Create Title I - Workforce Development \(WIOA\) Application](#)

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**WIOA #400013 - Incomplete**  

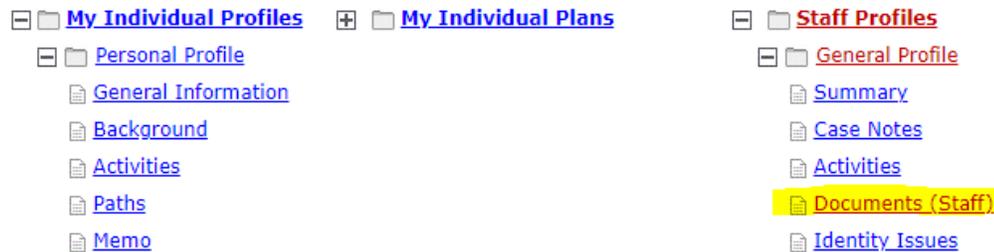
<b>+</b> LWDB:	<b>07 - Chicago Cook Workforce Partnership</b>	Application Date:	<b>12/03/2020</b>
Onestop:	<b>10 - Arlington Heights Workforce Center (8100)</b>	Participation Date:	<b>N/A</b>
Open/Total Activities:	<b>0 / 0</b>	Closure Date:	<b>N/A</b>
		Exit Date:	<b>N/A</b>

Verification Item	Verification Used	Documentation	Action
Actual Layoff Date	Not Available.	None	<a href="#">Verify</a> <a href="#">Scan</a> <a href="#">Upload</a> <a href="#">Link</a>
Youth Additional Assistance	Not Available.	None	<a href="#">Verify</a> <a href="#">Scan</a> <a href="#">Upload</a> <a href="#">Link</a>
Application Address	<input checked="" type="checkbox"/> A - Driver's License	Driver's License [Docx]	<a href="#">Modify</a> <a href="#">Verify</a> <a href="#">View Image</a> <a href="#">Edit Image</a> <a href="#">Delete Image</a> <a href="#">Meta Data</a>
Attending Any School	Not Available.	None	<a href="#">Verify</a> <a href="#">Scan</a> <a href="#">Upload</a> <a href="#">Link</a>
Basic Skills Deficient	Not Available.	None	<a href="#">Verify</a> <a href="#">Scan</a> <a href="#">Upload</a> <a href="#">Link</a>
Citizen	<input checked="" type="checkbox"/> C - Birth Certificate with place of birth	Birth Certificate with place of birth [Docx]	<a href="#">Modify</a> <a href="#">Verify</a> <a href="#">View Image</a> <a href="#">Edit Image</a> <a href="#">Delete Image</a> <a href="#">Meta Data</a>

## Uploading Additional Documents

Staff can also upload documents themselves in the *Staff Profiles > General Profile > Documents (Staff)* screen.

[ [Assist an individual](#) | [Staff Services](#) | [Individual Portfolio](#) ]



- Click on “Add a Document” to upload a document from a computer or “Scan a Document” to upload from a scanner.
- In the Document Association section, select the appropriate options to associate the document with a program and application.
- If the document is being used to verify something, select the “Verification Item” and “Verification Type”. The “Verification Type” options will match the “Verify” selection option for that item.

## Document Association

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If you would like to categorize the associated document to a specific program, subcategory, applica

<b>Program:</b>	<input type="text" value="Title I - Workforce Development (WIOA)"/>
<b>Application:</b>	<input type="text" value="WIA Application #400013; Application Date 12/3/2020"/>
<b>Verification Item:</b>	<input type="text" value="WIOA - Basic Skills Deficient Verification"/>
<b>Verification Type:</b>	<input type="text" value="Adult - Results from an Authorized Assessme"/>

- In the “Document Information” section:
  - Select the most applicable “Document Description” option. If no option is applicable, select “Other”.
  - In the “Document Tags” type in the name of the document and what it’s verifying (see example below).
  - If you want the participant to have access to view the document, set “User Accessible” to “Yes”. Otherwise, leave it set to “No”.
  - Type in the date you received the document. If it’s left blank the system will use today’s date.
  - If you check the “Document Expires” check box, a link will open to enter the expiration date. (This is not required but is a nice feature for things like Driver’s License.)

## Document Information

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**Document Description:**

**\* Document Tags:** Do not enter Personal Identifiable Information (PII) into this field.  
 Keywords that will be indexed with this attachment.

**User Accessible:**  Yes  No

**Date Received:**

**If left blank, today's date will be used.**

**Document Expires:**

- Click the “Select File” button to search for and find the file on your computer.
- Click “Save” to upload it.

## Attach Document

● Adult and Dislocated Eligibility Documents ...

Multiple documents can be uploaded simultaneously, but must be selected one-by-one.



The document will now appear in the “Documents Available” list.

### Documents Available

Listed below are the documents available on the selected Individual. Click the View link below to view that particular item.

[Show Filter Options \(Showing all records\)](#)

Results View: [Summary](#) | [Detailed](#)

View Thumbnails

Click a column title to sort.

[Top](#) | [Filter Criteria](#) | [Bottom](#)

Document Name	Document Tags	Category	Modify Date	Expiration Date	Action
 Adult_and_Dislocated_Eligibilit y_Documents_shortlist_attachment .docx	CASAS Test Scores - Basic Skills Deficient	Verification	12/03/2020 06:13		<a href="#">View</a> <a href="#">Review</a> <a href="#">Edit</a> <a href="#">Download</a> <a href="#">Meta Data</a> <a href="#">Delete</a>

- If you linked the document to a verification item, it will display under that verify list. You will still need to select the verify option on the screen, but you won’t need to re-link the document.
- If a document was attached in error, submit a request to the Help Desk to have it removed/unlinked from the verify. (Please include the client’s name, state ID #, and the field that was verified/linked incorrectly.)

\*Basic Skills Deficient/Low Levels of Literacy:  Yes  No

\*Verify: [\[ Verify | Scan | Upload | Link \]](#)

Adult - Results from an Authorized Assessment Test ([application/vnd.c](#))

\*Basic Skills Deficient/Low Levels of Literacy:  Yes  No

\*Verify: [\[ Verify | Scan | Upload | Link \]](#)

Adult - Results from an Authorized Assessment Test

Adult - Results from an Authorized Assessment Test ([application/vnd.openxmlforma](#))

#### Basic Skills Deficient Verification

Adult - Results from an Authorized Assessment Test

Adult - School records verifying applicant unable to take assessment test

Youth - Results from an Authorized Assessment Test