



Staff Document Upload Procedure

Overview

Agency staff can upload documents into Career Connect. The documents must be associated to a specific customer. For example, staff may upload eligibility documents, employment verification, attendance sheets, or copies of credentials earned.

Document Upload Instructions

Step 1: Pull up the individual whose documents you want to upload and navigate to Staff Profile > General Profile > Documents (staff).

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

- [-] [-] [My Individual Profiles](#)
- [-] [-] [Personal Profile](#)
- [-] [-] [General Information](#)
- [-] [-] [Background](#)
- [-] [-] [Activities](#)
- [-] [-] [Paths](#)
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- [+] [-] [My Individual Plans](#)
- [-] [-] [Staff Profiles](#)
- [-] [-] [General Profile](#)
- [-] [-] [Summary](#)
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- [-] [-] [Activities](#)
- [-] [-] [Documents \(Staff\)](#)
- [-] [-] [Identity Issues](#)

Step 2: Click on “Add a Document” to upload a document from a computer or “Scan a Document” to upload from a scanner.

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.

No docum

Add a Document

Scan a Document

Step 3: Associate & Tag the Document

- 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

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

Program:	Title I - Workforce Development (WIOA) ▼
Application:	WIA Application #400013; Application Date 12/3/2020 ▼
Verification Item:	WIOA - Basic Skills Deficient Verification ▼
Verification Type:	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

Document Description:

*** Document Tags:**
Keywords that will be indexed with this attachment.


Do not enter Personal Identifiable Information (PII) into this field.



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](#)

Click a column title to sort.

View Thumbnails


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

Document Name	Document Tags	Category	Modify Date	Expiration Date	Action
 Adult_and_Dislocated_Eligibility_Documents_shortlist_attachment.docx	CASAS Test Scores - Basic Skills Deficient	Verification	12/03/2020 06:13		View Review Edit Download Meta Data Delete

- If you linked the document to a verification item, it will display under that verify list on the appropriate screen. You will still need to select the verify option on the screen, but you won't need to re-link the document. (See screen shots below for an example.)
- If a document was attached in error, submit a request to your Partnership program contact to have it removed/unlinked from the verify. (Please include the client's name, state ID #, document name, and the field that was verified/linked incorrectly, if applicable.)

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

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

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

* 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