CHICAGO COOK WORKFORCE PARTNERSHIP

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69 WEST WASHINGTON I SUITE 2860 I CHICAGO, ILLINOIS 60602 I TEL 312 603-0200 I FAX 312 603-9939/9930

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]

<u> </u>	∄ My Individual Plans	Staff Profiles
Personal Profile		General Profile
General Information		Summary
Background		
Activities Activities		Activities
Paths		Documents (Staff)
Memo		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** | <u>Detailed</u> Click a column title to sort.

No docun



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.

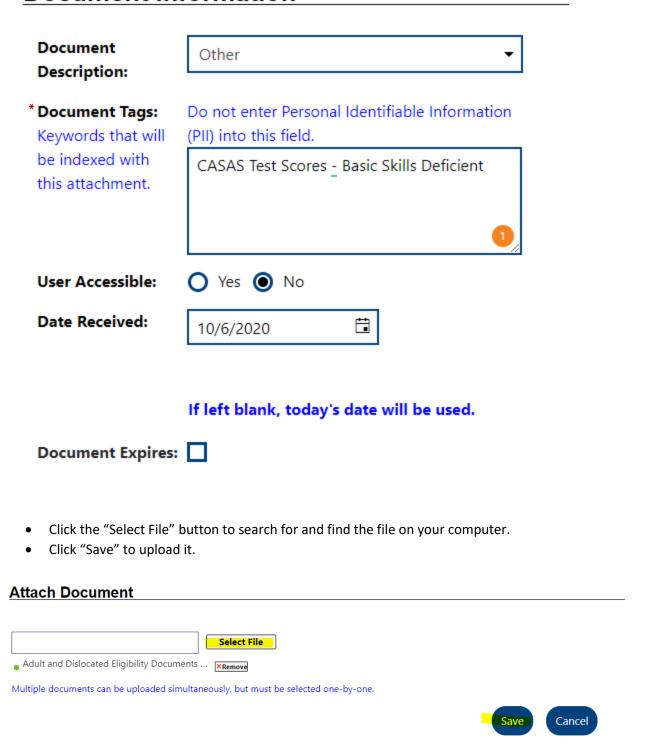
Document Association

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

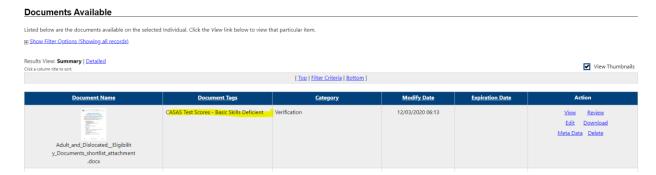


- In the "Document Information" section:
 - Select the most applicable "Document Description" option. If no option is applicable, select "Other".
 - o In the "Document Tags" type in the name of the document and what it's verifying (see example below).
 - If you want the participant to have access to 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.)

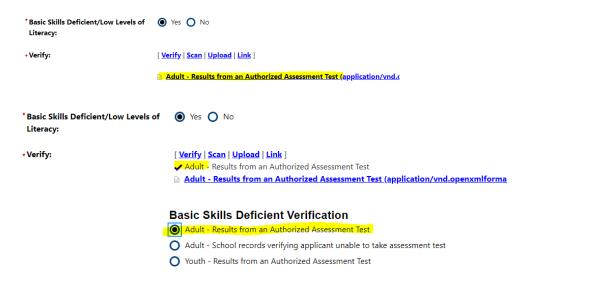
Document Information



The document will now appear in the "Documents Available" list.



- 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.)



9/1/2021