New Jersey Workforce Innovation Notice 11-17(M)

TO: Workforce Development System

FROM: John Bicica, Chief, Office of WDB Coordination and Support

SUBJECT: Adding Attachments to Customer Records in America's One-Stop Operating System

<u>Purpose</u>: To provide guidance on using the "Add Attachment" function of America's One-Stop Operating System (AOSOS)

Background

AOSOS includes an "Add Attachment" function which allows staff to upload documents directly into a customer's electronic record. These documents can include items used for intake and eligibity, case management, and for recording outcomes. This guidance will provide instruction on using this feature; One-stop Operators may develop their own policies on what documents their staff will upload.

For offices that elect to utilize this function, WIOA Title I supervisors and Employment Service Managers must designate staff who will be have access to this function. It is important for staff to follow these procedures to ensure accurate recording, monitoring and validation of uploaded documents.

Staff are not required to maintain a hard copy of any document that has been successfully uploaded, but may choose to do so. The Performance and Monitoring Unit and the Validation Unit will be capable of conducting desk reviews of uploaded documents. The Workforce Innovation and Opportunity Act Sec. 184 (a) (4) still requires the State to conduct an on-site monitoring review of all local areas on an annual basis.

Procedures

The procedures below address system requirements, scanning documents, document naming protocols and the upload process.

DATE: April 6, 2018

Procedures for Securely Uploading Documents to AOSOS

Required Equipment

PC with an attached scanner connected via USB (not a network accessible scanner)

<u>Step 1 - Creating and Securing the "AOSOS Uploads File on Your PC (You only Need to do this</u> <u>once - the first time you upload)</u>

- 1. From Windows Desktop, right click somewhere in the blue space
- 2. From the menu, click "New" and then click "Folder"
- 3. You will now have a folder called "New Folder" on your desktop
- 4. Right click on the "New Folder" and then click on "Rename" rename the folder "AOSOS Uploads" (no quotes)



5. Right click on the "AOSOS Uploads" file and click on "Properties" and "Advanced" then click "Encrypt contents to secure data" – hit ok and ok again to close the dialog boxes

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Step 2 - Uploading Documents to "AOSOS Uploads" Folder

- 1. Photocopy the customer's document and write their AOSOS Registration number on the photocopy.
- Scan the document as a PDF, name the document using the AOSOS Registration Number and the document type (such as NJ123456789 Driver's License) and save the document to the "AOSOS Uploads" folder. See Attachment Types and Document Names table below for the allowable document names. Capitalization is not required, and spaces may be used.

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Step 3 - Uploading Documents from PC to AOSOS

- 1. Logon to AOSOS
- 2. In the Customer Detail module go to the Attachments tab and click "Add Attachment."

Upload Attachment Date Added Attachment Type Source Staff Attachment File Type	zial Family Health Treatments Legal Housing Transportation Comme Staff Office File Name Last Modified	Attachment Detail Attachment Detail Attachment Type Notes
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3. Based on the document being uploaded, select the "Attachment Type" from the drop-down menu. The options are: Case Management, Credential Attainment, Skill Gains, Eligibility or Wage Information-see Attachment Types and Document Names table below. For example, if the document is a birth certificate. The Attachment Type would be Eligibity. Then click "Upload Attachment."

tachment Detail			
Attachment Type	Customer Miscellaneous (Inactive)	Staff	Novatin, Jacqueline
Notes	Case Management Credential Attainment Skill Gains	Office	
	Eliqibility Wage Information	File Name	
		Last Modified	
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4. Browse on your PC and find the document in that specially developed folder, highlight/select it and then click "Open."

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5. Once the location/document is in the popup, click "Upload" then save.

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6. The screenshot below shows a record with a successfully uploaded document.

Attachment Deta Attachment Typ	II Pe Eligibility		Staff	Novatin, Jac	queline
Note	es	^ -	Office File Name ast Modified	NJ0034937	08 birth certificate.docx
Date Added	Upland Attachment	Туре		Source	Staff
04/06/2018 N	J003493708 birth certificate docx	Eligibility			Novatin, Jacqueline

Attachment	Types and	Document	Names
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Attachment	Document Names
Туре	
Case	Intake Form
Management	Individual Service Strategy
	Employment Plan
	Resume
	Self-Certification Form (Form D)
Credential	Certificate
Attainment	Apprenticeship Certification
	License
	Associate degree
	Baccalaureate degree
Skill Gains	• Standardized Assessment Test Name Pre and Post) Examples: TABEpre-
	Test; TABEpost-Test; CASASpre-test; CASApost-test
	Secondary School Diploma
	Secondary School Equivalent
	School Transcript
	Report Card
	Progress Report*
	Exam Scores
	(*On-the-job training or Registered Apprenticeship)
Eligibility	Birth Certificate
	Driver's License
	 Passport (indicate US or foreign)
	School ID
	 Court Document (can state specific-marriage, adoptions, divorce);
	Military ID (DD-214)
	Social Security card
	Self-Certification (Form D)
Wage	Pay Stub
Information	Tax Return
	Survey
	Letter Note:
	Quarter would be decided by date

Rescissions

None

References and Links

None

Action Required

The names of these staff members must be submitted to: Jacqueline Novatin at <u>jacquelin.novatin@dol.nj.us</u> before this function can be utilized.

<u>Authority</u>

New Jersey Department of Labor and Workforce Development	Х
State Employment And Training Commission	

Questions

For questions related to these procedures, contact Jacqueline Novatin, Chief, AOSOS Technical Assistance at <u>jacquelin.novatin@dol.nj.us</u>.