

# 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

**DATE:** April 6, 2018

**Purpose:** 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 eligibility, 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 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.

## Procedures for Securely Uploading Documents to AOSOS

### Required Equipment

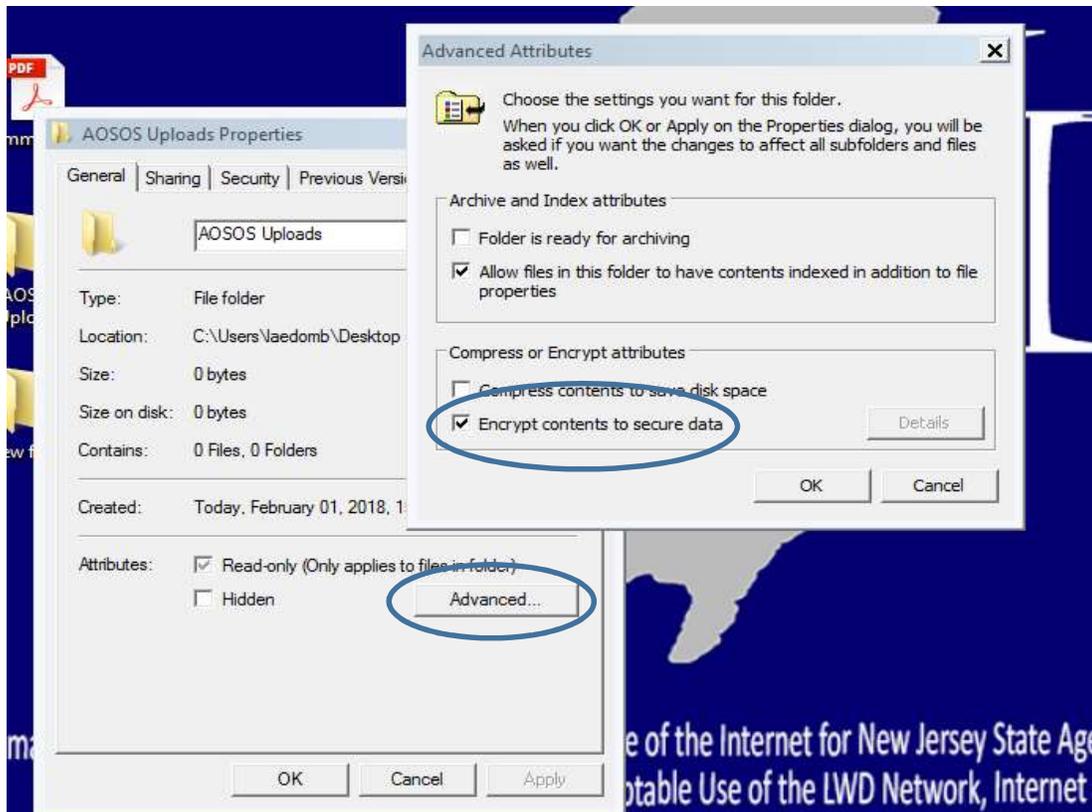
PC with an attached scanner connected via USB (not a network accessible scanner)

### Step 1 - Creating and Securing the “AOSOS Uploads File on Your PC (You only Need to do this once - the first time you upload)

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)

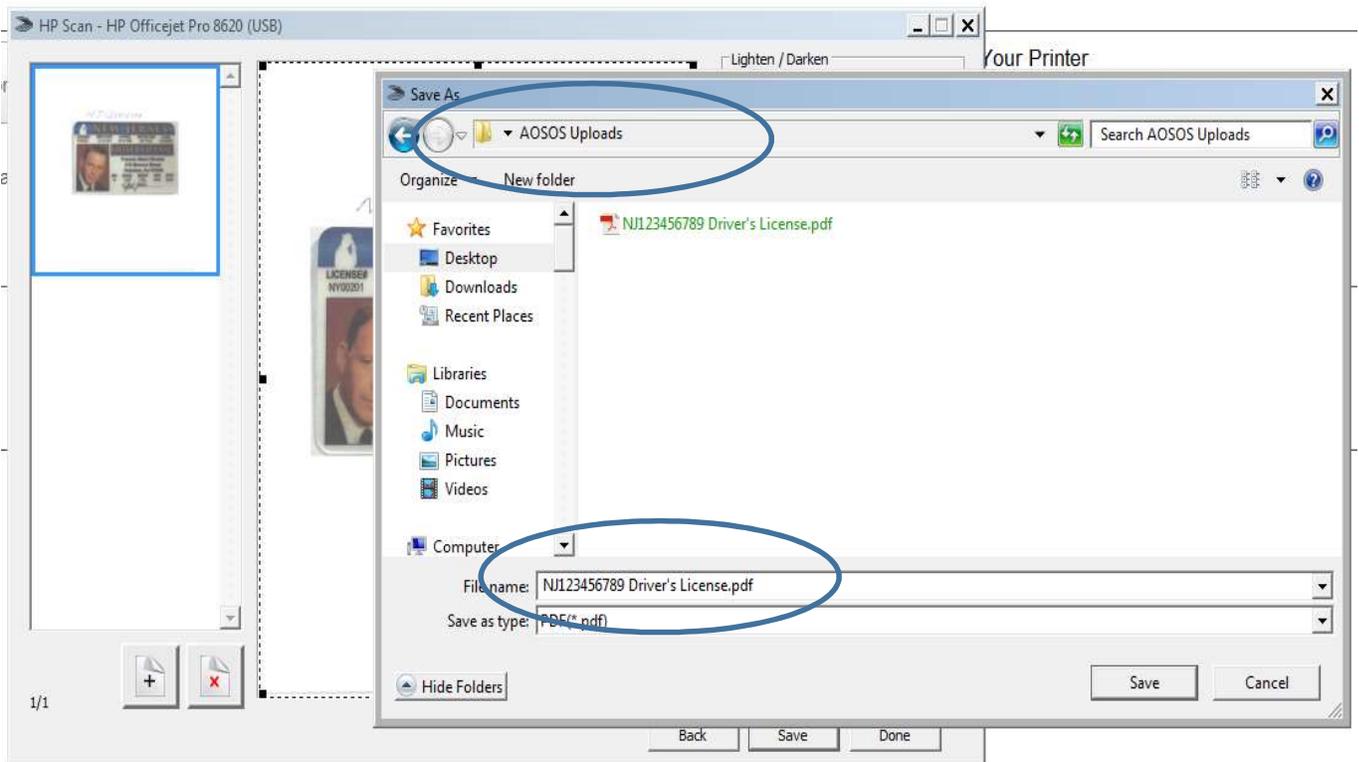


5. Right click on the “AOSOS Uploads” file and click on “Properties” and “Advanced” then click “Encrypt contents to secure data” – hit ok and ok again to close the dialog boxes



## **Step 2 - Uploading Documents to “AOSOS Uploads” Folder**

1. Photocopy the customer’s document and write their AOSOS Registration number on the photocopy.
2. 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.



### 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.”

Attachment Detail

Attachment Type

Notes

Staff

Office

File Name

Last Modified

Date Added	Attachment	Type	Source	Staff
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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 *Eligibility*. Then click “Upload Attachment.”

Attachment Detail

Attachment Type

Notes

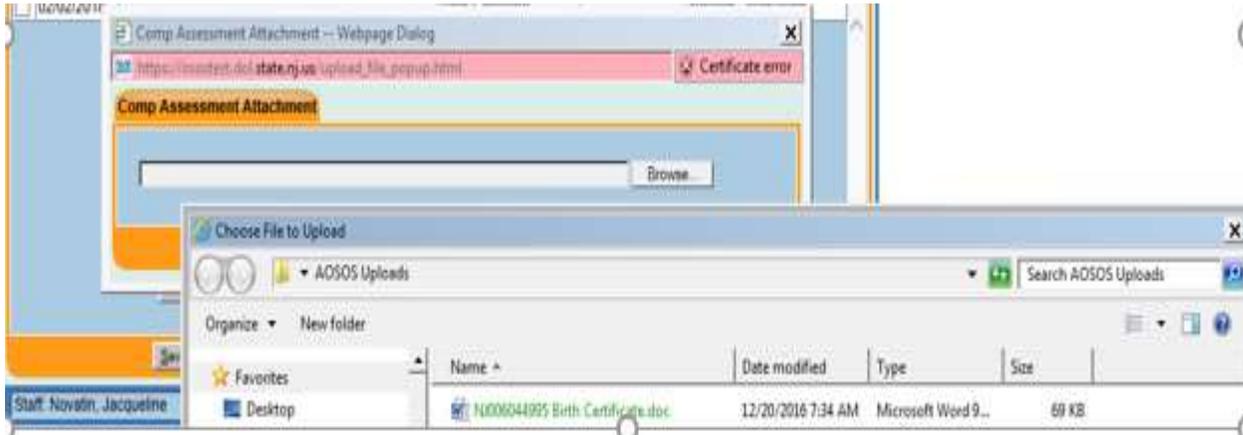
Staff

Office

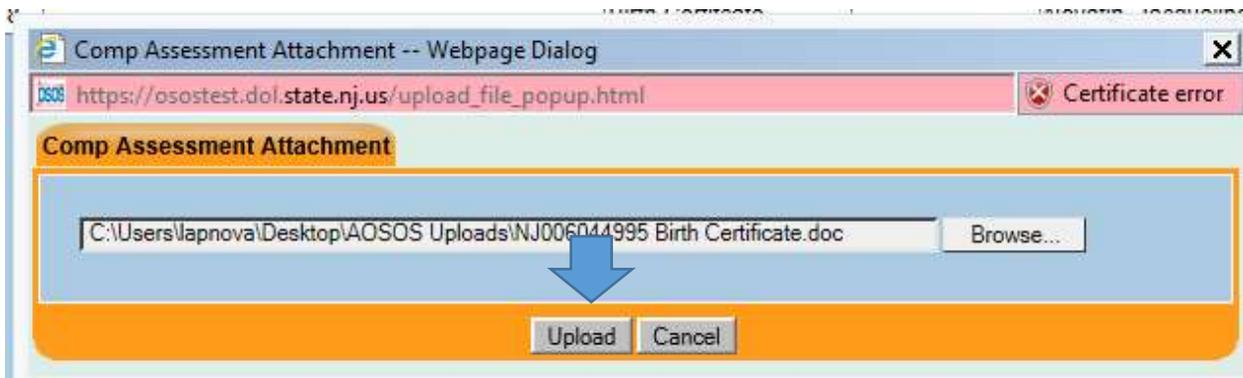
File Name

Last Modified

- Browse on your PC and find the document in that specially developed folder, highlight/select it and then click "Open."



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



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



### Attachment Types and Document Names

Attachment Type	Document Names
Case Management	<ul style="list-style-type: none"> <li>• Intake Form</li> <li>• Individual Service Strategy</li> <li>• Employment Plan</li> <li>• Resume</li> <li>• Self-Certification Form (Form D)</li> </ul>
Credential Attainment	<ul style="list-style-type: none"> <li>• Certificate</li> <li>• Apprenticeship Certification</li> <li>• License</li> <li>• Associate degree</li> <li>• Baccalaureate degree</li> </ul>
Skill Gains	<ul style="list-style-type: none"> <li>• Standardized Assessment Test Name Pre and Post) <b>Examples:</b> TABEpre-Test; TABEpost-Test; CASASpre-test; CASApst-test</li> <li>• Secondary School Diploma</li> <li>• Secondary School Equivalent</li> <li>• School Transcript</li> <li>• Report Card</li> <li>• Progress Report*</li> <li>• Exam Scores</li> </ul> <p>(*On-the-job training or Registered Apprenticeship)</p>
Eligibility	<ul style="list-style-type: none"> <li>• Birth Certificate</li> <li>• Driver’s License</li> <li>• Passport (indicate US or foreign)</li> <li>• School ID</li> <li>• Court Document (can state specific-marriage, adoptions, divorce);</li> <li>• Military ID (DD-214)</li> <li>• Social Security card</li> <li>• Self-Certification (Form D)</li> </ul>
Wage Information	<ul style="list-style-type: none"> <li>• Pay Stub</li> <li>• Tax Return</li> <li>• Survey</li> <li>• Letter</li> </ul> <p style="text-align: right;"><b>Note:</b> Quarter would be decided by date</p>

**Rescissions**

None

**References and Links**

None

**Action Required**

The names of these staff members must be submitted to: Jacqueline Novatin at [jacquelin.novatin@dol.nj.us](mailto:jacquelin.novatin@dol.nj.us) before this function can be utilized.

**Authority**

New Jersey Department of Labor and Workforce Development	<b>X</b>
State Employment And Training Commission	

**Questions**

For questions related to these procedures, contact Jacqueline Novatin, Chief, AOSOS Technical Assistance at [jacquelin.novatin@dol.nj.us](mailto:jacquelin.novatin@dol.nj.us).