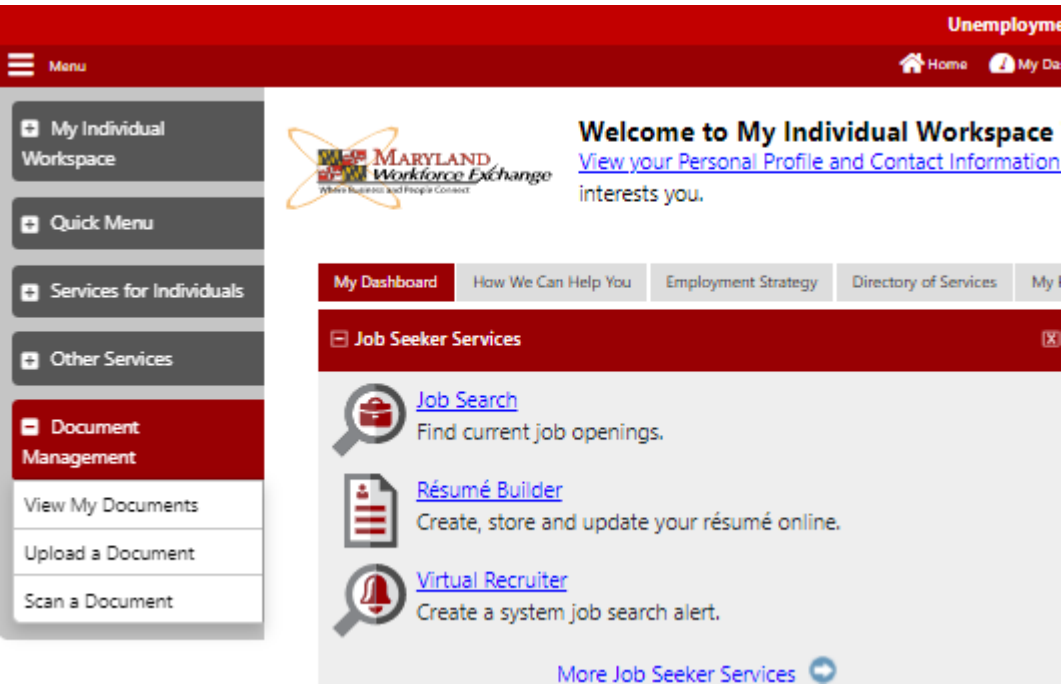


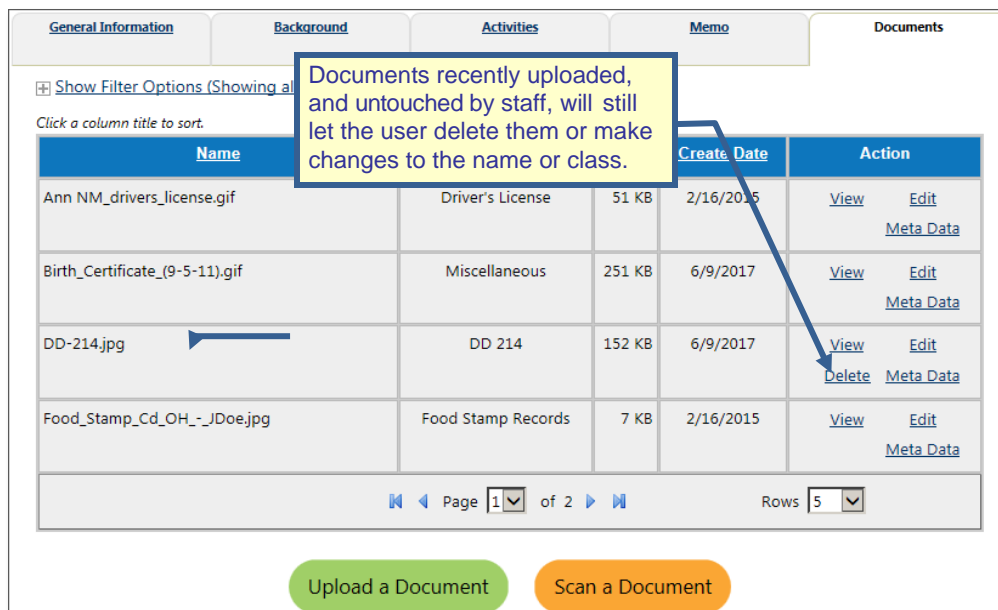
Individuals Guide to Upload a Document



The screenshot shows the 'My Individual Workspace' interface. On the left, a sidebar menu has 'Document Management' highlighted in red, with an orange arrow pointing to it. The main area displays 'Welcome to My Individual Workspace' and 'Job Seeker Services' with links for 'Job Search', 'Résumé Builder', and 'Virtual Recruiter'.

Documents Tab

The Documents tab lets individuals upload documents, manage any documents they uploaded, and view any documents uploaded by the system or by staff (that are flagged for their viewing).



The screenshot shows the 'Documents' tab interface. A table lists documents with columns for Name, Create Date, and Action. A callout box highlights that documents recently uploaded and untouched by staff can be deleted or renamed. Below the table are 'Upload a Document' and 'Scan a Document' buttons.

Name		Create Date	Action
Ann NM_drivers_license.gif	Driver's License	51 KB 2/16/2015	View Edit Meta Data
Birth_Certificate_(9-5-11).gif	Miscellaneous	251 KB 6/9/2017	View Edit Meta Data
DD-214.jpg	DD 214	152 KB 6/9/2017	View Edit Delete Meta Data
Food_Stamp_Cd_OH_-_JDoe.jpg	Food Stamp Records	7 KB 2/16/2015	View Edit Meta Data

Page 1 of 2
Rows 5

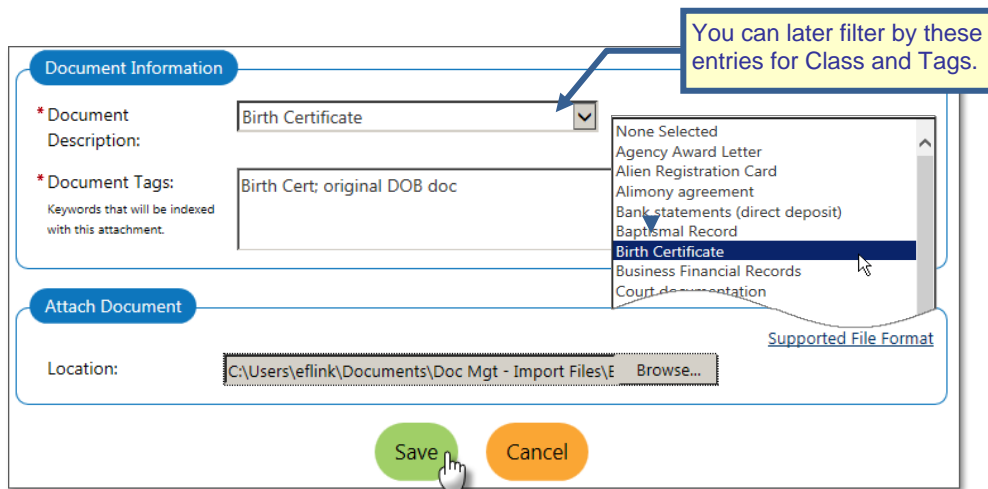
Upload a Document
Scan a Document

Note: Not all sites include this Documents option. However, if the option is purchased and turned on for staff, it is also turned on for individuals.

There are many points in Virtual OneStop where staff must validate or verify data input through verification documents supplied by the individual. For example, documents are used to verify data as part of qualifying for additional services funded by government programs (e.g., a staff member may ask a client to display a Social Security card, birth certificate, or driver's license to verify information). Individuals may upload documents to assist staff in their verification, and may then review documents whose images are stored for them as part of this verification.

To add / upload a document:

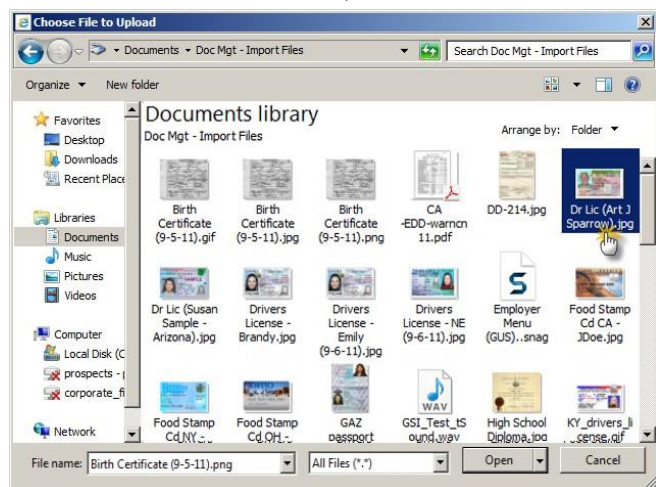
- **Click** the Documents tab, then click **Upload a Document** button. The Add Document screen displays.
- On the screen that opens, select a description of the document from the *Document Description* drop-down list. (This will be the displayed *Class*.)



Upload Document Screen & Document Description List (Partial)

- Enter the *Document Tags* in the text field provided. (These will be indexed with the document, and helps staff search and individuals filter or search for the document.)
- Attach the document.

- Select the **Browse** button to locate the file you wish to upload (or **Choose File** for Chrome browsers)
- Choose the file to upload.
Note: You can click a Supported File Format link to see a list of supported file formats.
- Press **Save** as the final step to save and upload the document.



Document Filters
 Document Tag :
 Class:

[General Information](#) [Back](#)

☑ Show Filter Options (Showing all records)

Click a column title to sort.

You can filter on the tags and descriptions you included.

Name	Tags	Class	Create Date	ACTION
Ann NM_drivers_license.gif	NM Driver's License for Ann Marie	Driver's License	2/16/2015	View Download Edit Meta Data
Birth_Certificate_(9-5-11).gif	Birth Cer; DOB	Miscellaneous	6/9/2017	View Download Edit Meta Data
Birth_Certificate_(9-5-11).png	Birth Cert; original DOB doc; BC	Birth Certificate	6/9/2017	View Download Edit Delete Meta Data
DD214; Vet Service		DD 214	6/9/2017	View Download Edit Delete Meta Data

Documents

For your security and protection, you must enter the password used at login in order to proceed.

Password:

Users can delete or edit files they recently uploaded (e.g., change the description or tags) until staff review them. But they will need to enter their password to view or change them.

General Profile, Documents Tab (After Adding Documents)

After you have uploaded the file it displays in the list on the Documents tab. You can click the View link at the right of each document to see the image and other details for the document.

Note: *The Class column reflects the drop-down selected for “description.” If the user has many documents on this tab, they can filter by a Class and/or by specific words in the Document Tags (and use the Tags column to help identify the specific document).*

Users can also click links for viewing and changes: [View](#) to open or download the image, [Edit](#) to change the description or tags, [Meta Data](#) to change only the data tag, or [Delete](#) to remove the document. This is allowed until staff reviews/validates the document. After that, [Delete](#) will not display, and [Edit](#) and [Meta Data](#) will open a screen without the ability to make changes. Users will need to enter their password to view, edit, or delete their documents.

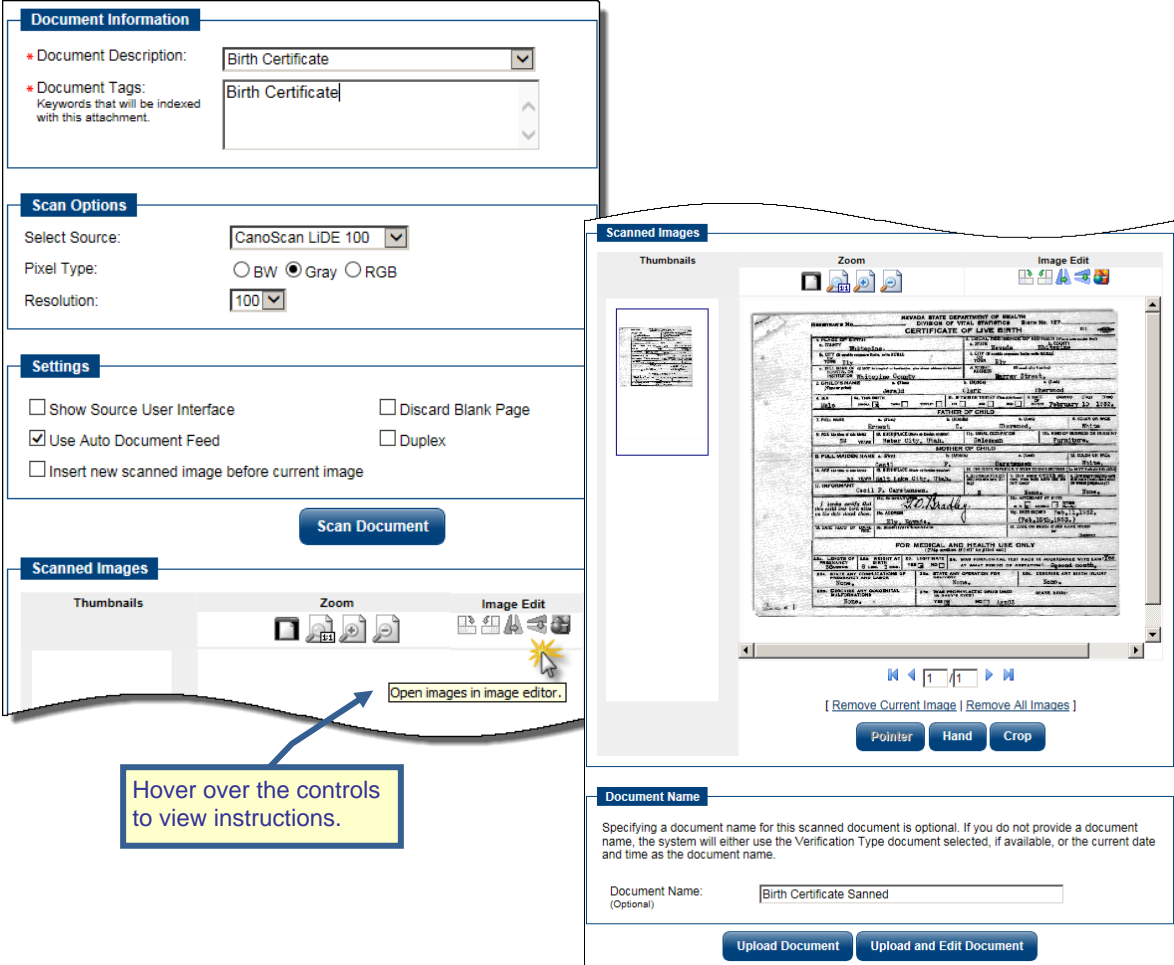
To scan and save a document:

Individuals whose systems include scanning capabilities, can scan a document and add the file to their Documents tab. The process is started similarly to the Upload a Document process.

- **Click** the Documents tab, then click the **Scan a Document** button.
- In Documents Information:
 - Select from the *Document Description* drop-down list. (This will be the displayed *Class*.)
 - Enter the *Document Tags* in the text field provided.
- In Scan Options:
 - Review the parameters in the Scan Options and the Setting areas. Change any of them as required (e.g., the source scanner or the color setting).
 - Select the source of the document from the *Select Source* drop-down list. (If there are no scanners displayed in the drop-down list, it means that the system cannot find any scanners connected to the computer.)
 - Select the *Pixel Type* (BW, Gray, or RGB). (Color usually increases the file size.)

- Select the *Resolution* of the scanned image. (Higher resolutions result in better quality scanned images but make the file size larger.)
- In Settings:
 - Select all the checkboxes that apply to the scanned document.

Checkboxes are dependent on the scanner (e.g., a flatbed scanner may not have Auto Document Feed or Duplex settings).



The screenshot displays the 'Scanned Document Screen (Partial)' with the following sections:

- Document Information:**
 - Document Description: Birth Certificate
 - Document Tags: Birth Certificate
- Scan Options:**
 - Select Source: CanoScan LIDE 100
 - Pixel Type: BW Gray RGB
 - Resolution: 100
- Settings:**
 - Show Source User Interface
 - Use Auto Document Feed
 - Insert new scanned image before current image
 - Discard Blank Page
 - Duplex
- Scanned Images:**
 - Thumbnail view on the left.
 - Main view showing a birth certificate document with 'Zoom' and 'Image Edit' controls.
 - Buttons: Pointer, Hand, Crop.
- Document Name:**
 - Document Name (Optional): Birth Certificate Scanned
 - Buttons: Upload Document, Upload and Edit Document

A yellow callout box with an arrow points to the 'Open images in image editor' link, containing the text: "Hover over the controls to view instructions."

Scanned Document Screen (Partial)

- Click the **Scan Document** button (to perform the image scan).
- Preview the document in the Scanned Images section of the screen. Users can move, align, and crop the image using the controls on the screen.
- Enter the name of the document in the *Document Name* field.
- Click the **Upload Document** button to upload the document into the system.

A confirmation box will indicate the document is uploaded. You can then continue to make any changes from the screen, or return to the previous Documents tab view.