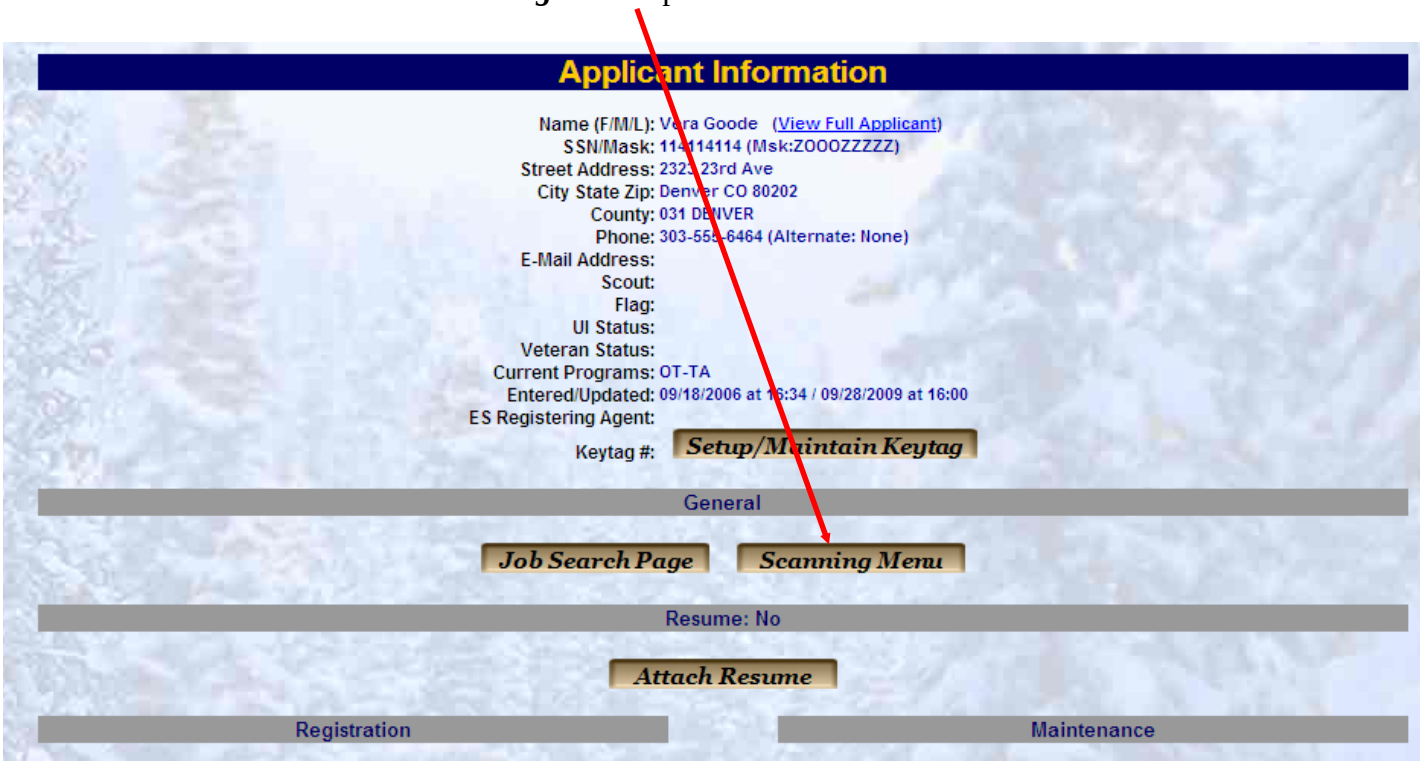
Electronic Document Management

Scanning and Uploading WIA Documents to Connecting Colorado

Organization of case management documents is greatly aided by Connecting Colorado's scanning function. Correctly labeling each document assures fast and easy retrieval for the Case Manager and the Program Monitor. To begin, save a document as a PDF to a designated location. Documents can be accumulated in a file labeled with the Participant's name. To upload the document, access the Participant's **Applicant Information** screen and choose the ***Scanning Menu*** option.



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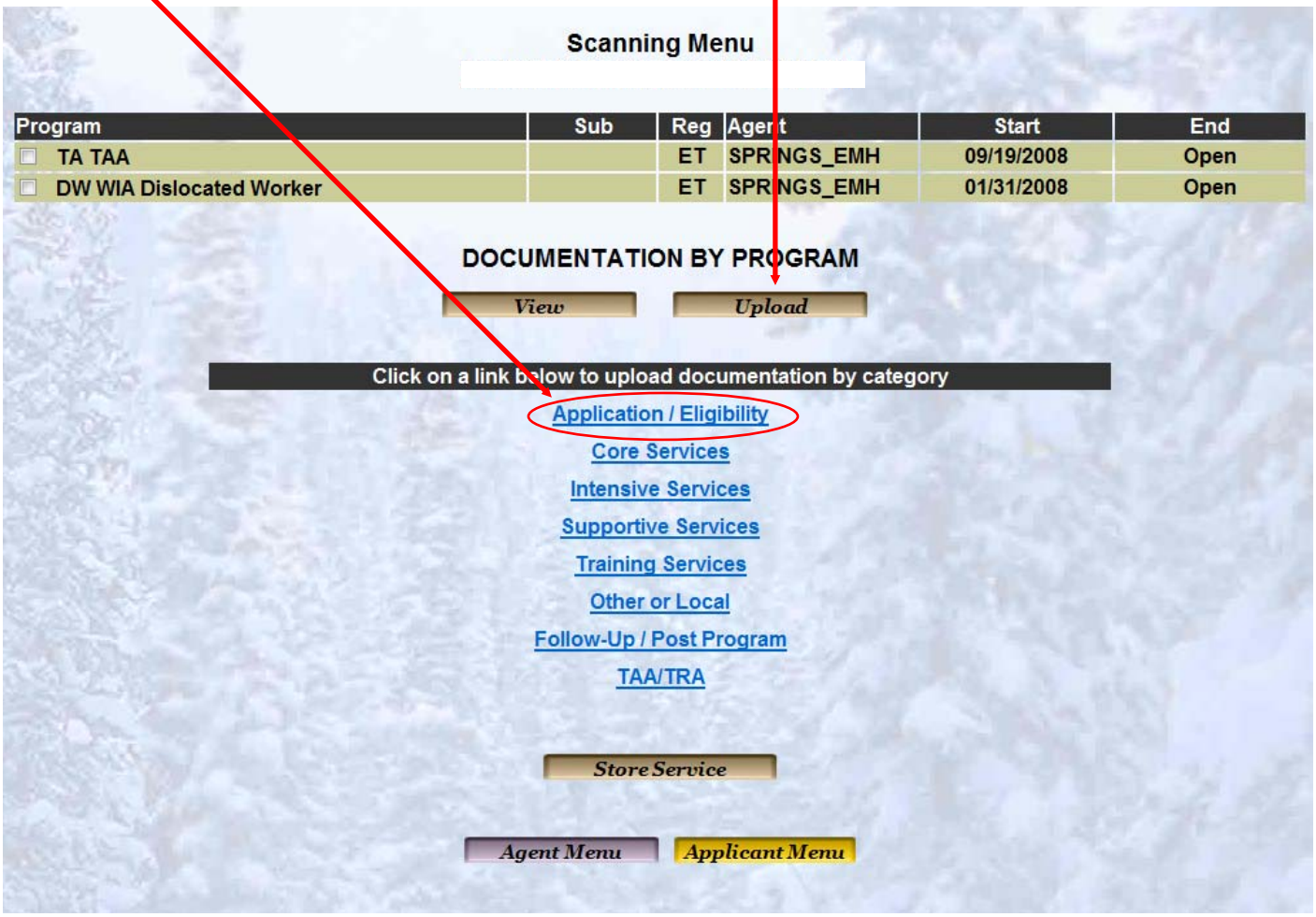
On the **Scanning Menu** screen, choose the Program, then the ***Upload*** option. Click on the link to the desired **Document Category.** **NOTE**, the ***View*** option is used to retrieve a specified document.



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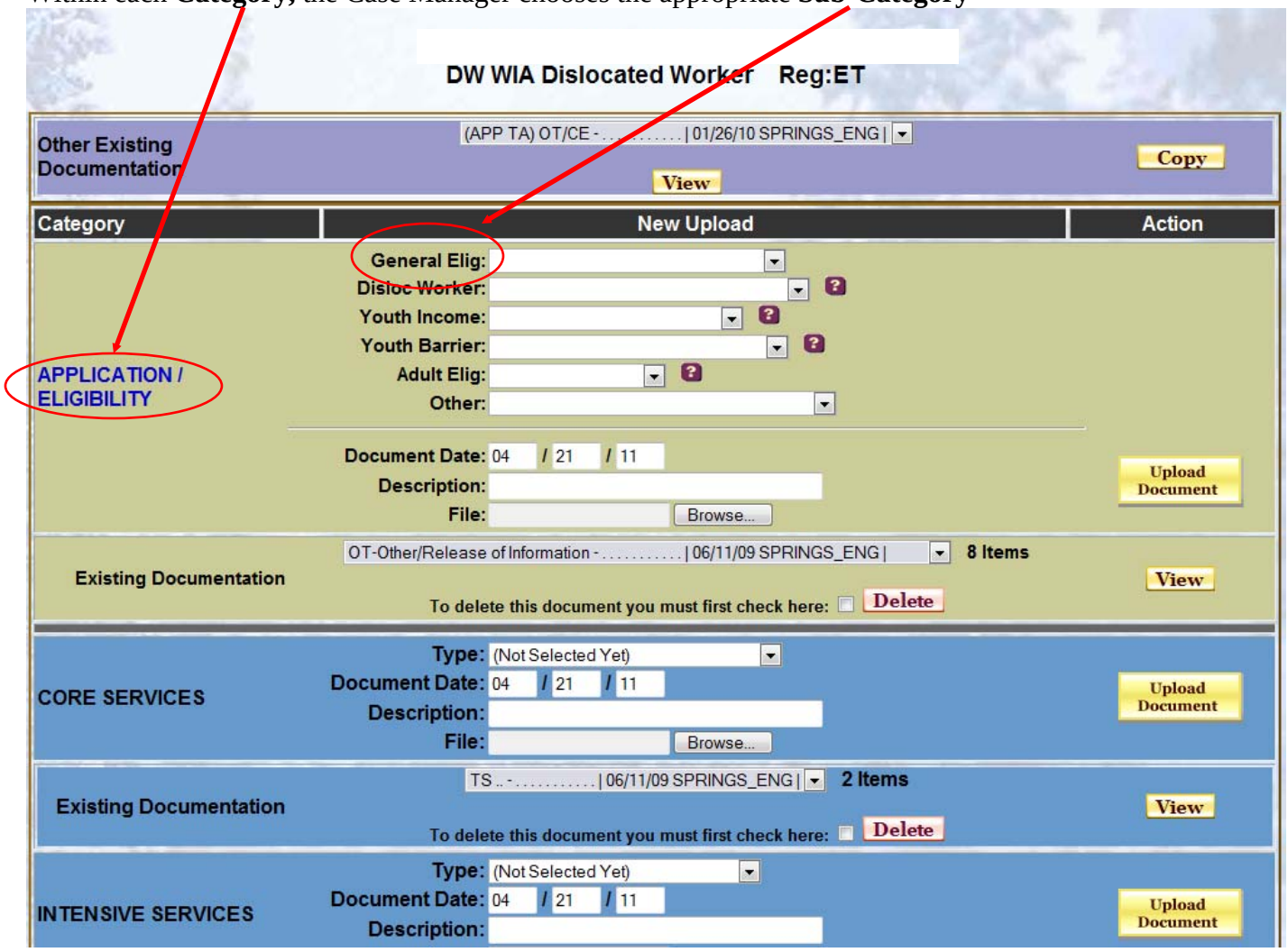
Within each **Category,** the Case Manager chooses the appropriate **Sub-Category**



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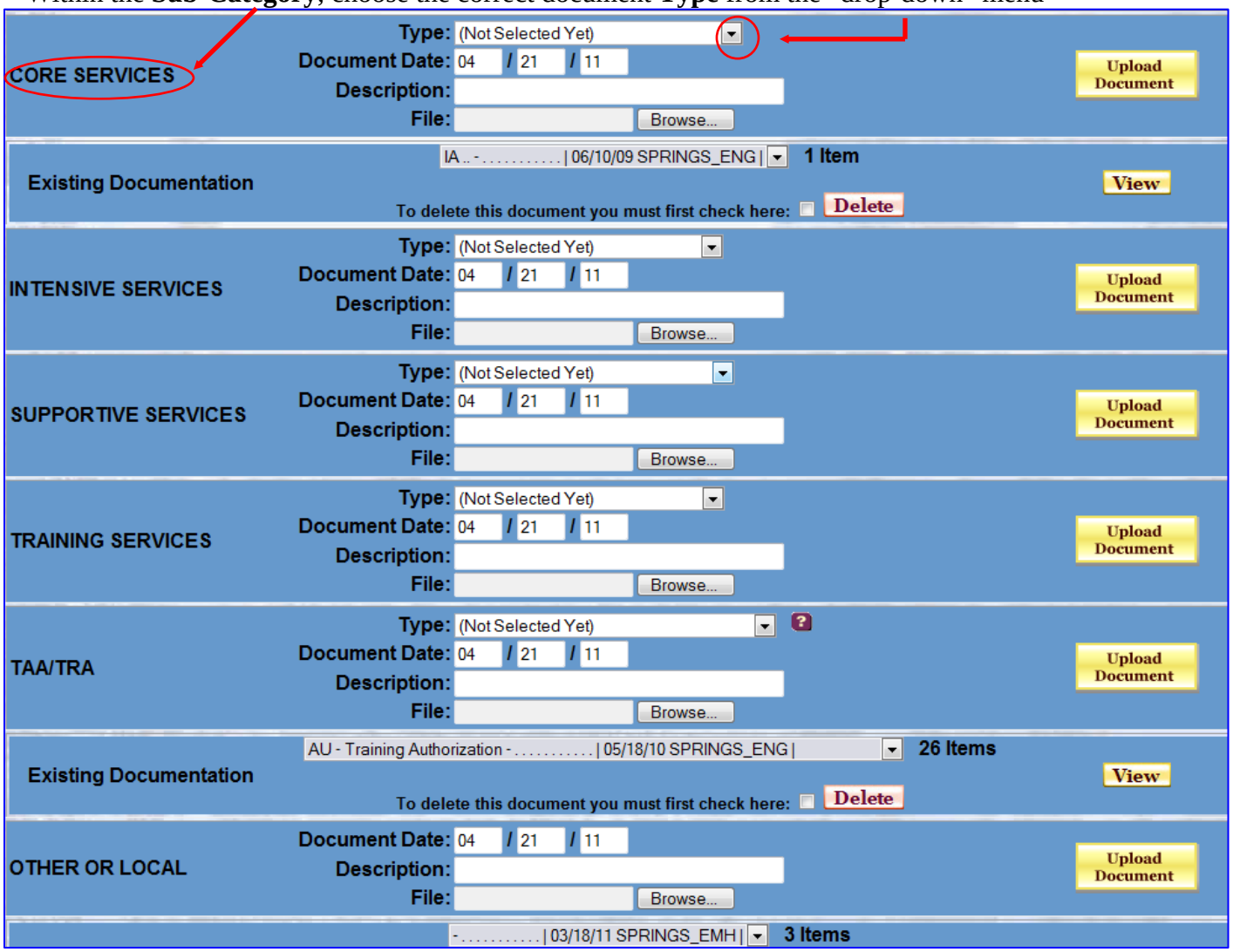
Within the **Sub-Category**, choose the correct document **Type** from the "drop-down" menu



The document types available for each sub-category are listed on the next page. As the result of a changes in policys/procedures, some of the types listed below may not display on the drop-down menu and other newly-defined services may be added.

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document types
scanning TAA documents

DOCUMENT CATEGORY | DOCUMENT SUB-CATEGORY | DOCUMENT TYPE

Application/Eligibility

General Eligibility - GE

AP - Application	**CI** - Citizenship/Alien Status	**SS** - Selective Service
AG - Date of Birth/Age	**VT** - Veteran	**IM** - Affidavit of Immigration Status
OT - Other		

Disolcated Worker- DW

PC - Plant Closure	**SL** - Substantial Layoff	**LU** - Layoff/UI/Unlikely to Return
SE - Self Employed/Business Closed	**DH** - Displaced Homemaker	**GC** - General Announcement of Closure
PR - UI Profiled	**OT** - Other	

Youth Income - IN

TA - TANF	**RA** - Refugee Assistance	**SI** - Supplemental Security Income
IN - Income	**FS** - Food Stamps	**HR** - Homeless/Runaway
FC - Foster Child	**ID** - Individual with Disability	**5P** - 5% Window
OT - Other		

Youth Barrier - YB

BS - Basic Skills Deficient	**DO** - Drop Out	**HC** - Homeless/Runaway/Foster
PY - Pregnant/Parenting	**OF** - Offender	**ND** - Needs Assistance

Adult - AD

IN - Income	**RE** - Residency	**OT** - Other

Other - OT

CE - Complaint Procedure/EEO	**RI** - Release of Information	**OT** - Other

Core Services

BA - Bonding Assistance	**EO** - Equal Opportunity Notice	**ED** - Employment Development Plan
FL - Follow-Up	**IA** - Initial Assessment	**LM** - Labor Market Information
PG - Planned Gap	**RP** - Resume Prep	**TS** - Testing
VG - Vocational Guide	**CC** - Connecting Colorado Orientation	**CM** - Case Management (Not WIA)
FS - File Search	**HK** - Hurricane Katrina	**JC** - Job Finding Club
JD - Job Development	**JR** - Job Readiness	**JS** - Job Search Assistance
JW - Job Search Workshop	**LT** - Refer to Local Training	
RC - Resource Center	**RS** - Refer to Supportive Services	**RT** - Refer to Federal Training
RW - Refer to WIA Training	**TC** - Tax Credit	**TV** - Transition Assistance (Vet)
UN - Employed (Locally Defined)		**OT** - Other

Intensive Services

CA - Comprehensive Assessment	**CS** - Counseling	**IE** - IEP Development
KT - Key Train	**OA** - Out of Area Search	**PV** - Pre-Vocation Services
SU - Subsistence Payments	**WE** - Work Experience	**WK** - Work Keys
WJ - Non-ES Job Search	**WU** - Unpaid Work Experience	

Supportive Services

CO - Counseling	**DR** - Disaster Relief	**FC** - Family Care
HM - Health/Medical	**NR** - Needs Related	**RA** - Rent Assistance
RL - Relocation	**SA** - Substance Abuse	**SS** - Other
TR - Transportation		

Training Services

AE - Adult Literacy Education	**ET** - Entrepreneurial Training	**CT** - Certificate
CU - Customized Training	**OC** - Occupational Skills	**OJ** - On-the-Job Training
UP - Skill Retrain/Upgrade	**OT** - Other	

Other Youth Services

AM - Adult Mentor	**AS** - Alternative School	**BS** - Basic Skills
CG - Comprehensive Guide Counseling	**IN** - Incentive Payments	**LD** - Leadership Skills
LN - Literacy/Numeracy	**SE** - Summer Employment	**TG** - Tutoring
WR - Work Ready Skills	**WU** - Unpaid Work Experience	**YW** - Work Readiness Goal
OT - Other		

TAA/TRA

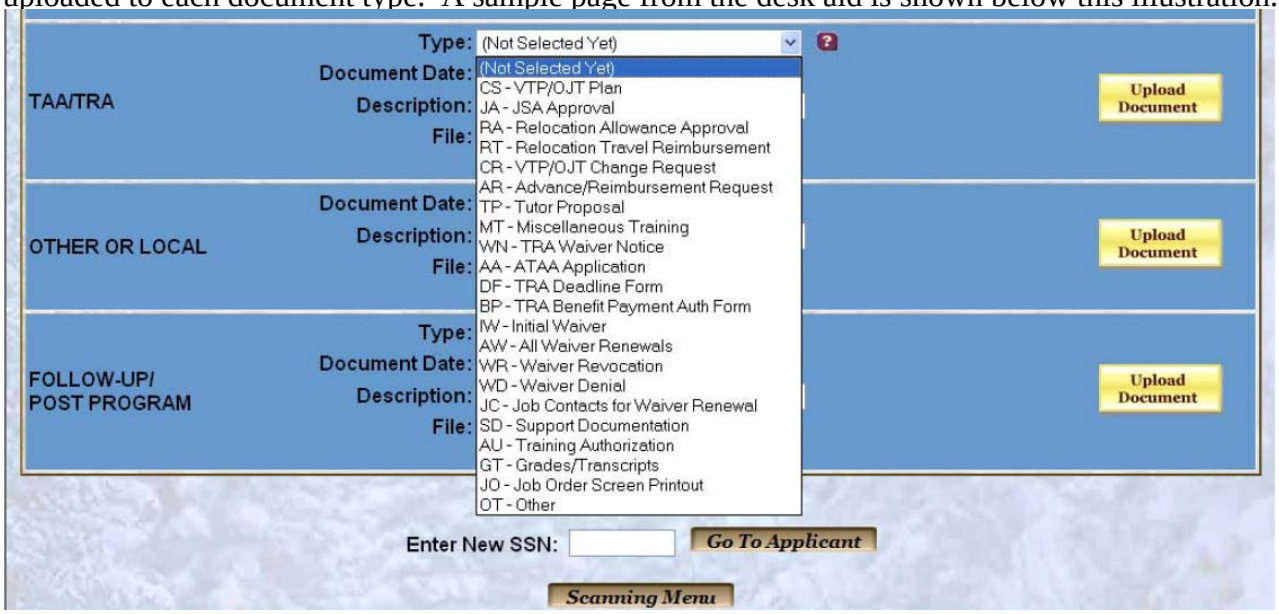
CS - VTP/OJT Plan	**JA** - JSA Approval	**RA** - Relocation Allowance Approval
RT - Relocation Travel Reimbursement	**CR** - VTP/OJT Change Request	**AR** - Advance/Reimbursement Request
TP - Tutor Proposal	**MT** - Miscellaneous Training	**WN** - TRA Waiver Notice
AA - ATAA Application	**DF** - TRA Deadline Form	**BP** - TRA Benefit Payment Authorization Form
IW - Initial Wavier	**AW** - All Wavier Renewals	**WR** - Wavier Revocation
WD - Wavier Denial	**JC** - Job Contacts	**SD** - Support Documentation
AU - Training Authorization	**GT** - Grades/Transcripts	**JO** - Job Order Screen Printouts
OT - Other		

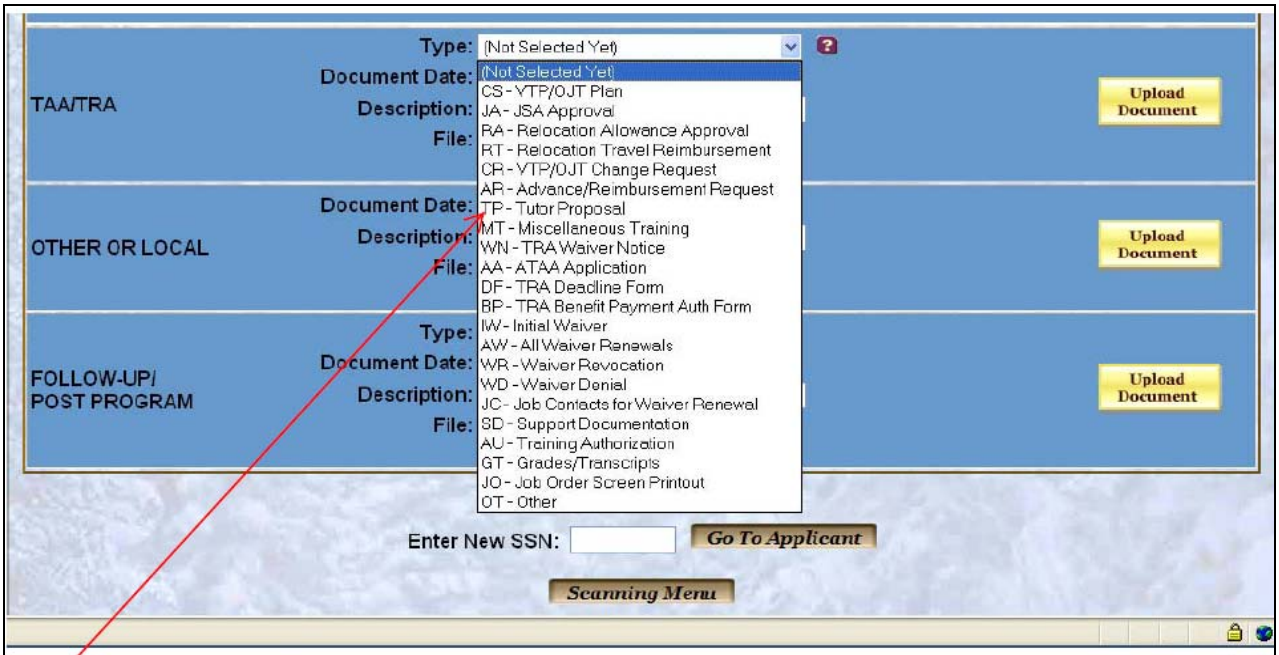
Follow-Up/Post Program

Q1 - First Quarter Follow-Up	**Q2** - Second Quarter Follow-Up	**Q3** - Third Quarter Follow-Up
OB - Certificate Obtainment	**TM** - Termination Form	**EL** - Exit Letter
CR - Consent to Release Information	**OT** - Other	

Scanning and Uploading TAA Participant Documents to Connecting Colorado

The TAA Document Types are specified in the drop-down list. In most cases, the document type will be a group of documents filed as a single document. Use the **Description** field to distinguish by the date of service or the date the form was completed. TAA desk aid 119 describes the documents that are to be uploaded to each document type. A sample page from the desk aid is shown below this illustration.





TP - Tutor Proposal

WHAT TO SCAN/UPLOAD: All documents related to tutoring services requested by and provided to the Participant

SCANNING ORDER:
1. The Tutor's proposal completed by the Tutor, (one proposal for each subject), including the tutoring schedule and hourly charge
2. Documents provided by the tutor regarding the Participant's progress and or performance
3. Correspondence related to each Tutoring Proposal

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