

## 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.

**Applicant Information**

Name (F/M/L): Vera Goode ([View Full Applicant](#))  
SSN/Mask: 114114114 (Msk:Z000ZZZZ)  
Street Address: 2323 23rd Ave  
City State Zip: Denver CO 80202  
County: 031 DENVER  
Phone: 303-555-6464 (Alternate: None)  
E-Mail Address:  
Scout:  
Flag:  
UI Status:  
Veteran Status:  
Current Programs: OT-TA  
Entered/Updated: 09/18/2006 at 16:34 / 09/28/2009 at 16:00  
ES Registering Agent:  
Keytag #: [Setup/Maintain Keytag](#)

**General**

[Job Search Page](#) [Scanning Menu](#)

Resume: No

[Attach Resume](#)

**Registration** **Maintenance**

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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.

**Scanning Menu**

Program	Sub	Reg	Agent	Start	End
<input type="checkbox"/> TA TAA		ET	SPRNGS_EMH	09/19/2008	Open
<input type="checkbox"/> DW WIA Dislocated Worker		ET	SPRNGS_EMH	01/31/2008	Open

**DOCUMENTATION BY PROGRAM**

[View](#) [Upload](#)

Click on a link below to upload documentation by category

- [Application / Eligibility](#)
- [Core Services](#)
- [Intensive Services](#)
- [Supportive Services](#)
- [Training Services](#)
- [Other or Local](#)
- [Follow-Up / Post Program](#)
- [TAA/TRA](#)

[Store Service](#)

[Agent Menu](#) [Applicant Menu](#)

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

**DW WIA Dislocated Worker Reg:ET**

Other Existing Documentation (APP TA) OT/CE - ..... | 01/26/10 SPRINGS\_ENG | Copy

View

Category	New Upload	Action
	<p>General Elig: <input type="text"/></p> <p>Disloc Worker: <input type="text"/> ?</p> <p>Youth Income: <input type="text"/> ?</p> <p>Youth Barrier: <input type="text"/> ?</p> <p>Adult Elig: <input type="text"/> ?</p> <p>Other: <input type="text"/></p> <hr/> <p>Document Date: 04 / 21 / 11</p> <p>Description: <input type="text"/></p> <p>File: <input type="text"/> <span>Browse...</span></p>	<span>Upload Document</span>
Existing Documentation	OT-Other/Release of Information - .....   06/11/09 SPRINGS_ENG   <b>8 Items</b>	<span>View</span>
	To delete this document you must first check here: <input type="checkbox"/> <span>Delete</span>	
CORE SERVICES	Type: (Not Selected Yet) <input type="text"/> Document Date: 04 / 21 / 11 Description: <input type="text"/> File: <input type="text"/> <span>Browse...</span>	<span>Upload Document</span>
Existing Documentation	TS .. - .....   06/11/09 SPRINGS_ENG   <b>2 Items</b>	<span>View</span>
	To delete this document you must first check here: <input type="checkbox"/> <span>Delete</span>	
INTENSIVE SERVICES	Type: (Not Selected Yet) <input type="text"/> Document Date: 04 / 21 / 11 Description: <input type="text"/>	<span>Upload Document</span>

APPLICATION / ELIGIBILITY

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

<b>CORE SERVICES</b>	Type: (Not Selected Yet) <input type="button" value="v"/>	<input type="button" value="Upload Document"/>
	Document Date: 04 / 21 / 11 Description: <input type="text"/> File: <input type="text"/> <input type="button" value="Browse..."/>	
Existing Documentation IA...   06/10/09 SPRINGS_ENG   <input type="button" value="v"/> 1 Item		<input type="button" value="View"/>
To delete this document you must first check here: <input type="checkbox"/> <input type="button" value="Delete"/>		
<b>INTENSIVE SERVICES</b>	Type: (Not Selected Yet) <input type="button" value="v"/>	<input type="button" value="Upload Document"/>
	Document Date: 04 / 21 / 11 Description: <input type="text"/> File: <input type="text"/> <input type="button" value="Browse..."/>	
<b>SUPPORTIVE SERVICES</b>	Type: (Not Selected Yet) <input type="button" value="v"/>	<input type="button" value="Upload Document"/>
	Document Date: 04 / 21 / 11 Description: <input type="text"/> File: <input type="text"/> <input type="button" value="Browse..."/>	
<b>TRAINING SERVICES</b>	Type: (Not Selected Yet) <input type="button" value="v"/>	<input type="button" value="Upload Document"/>
	Document Date: 04 / 21 / 11 Description: <input type="text"/> File: <input type="text"/> <input type="button" value="Browse..."/>	
<b>TAA/TRA</b>	Type: (Not Selected Yet) <input type="button" value="v"/> ?	<input type="button" value="Upload Document"/>
	Document Date: 04 / 21 / 11 Description: <input type="text"/> File: <input type="text"/> <input type="button" value="Browse..."/>	
Existing Documentation AU - Training Authorization - .....   05/18/10 SPRINGS_ENG   <input type="button" value="v"/> 26 Items		<input type="button" value="View"/>
To delete this document you must first check here: <input type="checkbox"/> <input type="button" value="Delete"/>		
<b>OTHER OR LOCAL</b>	Document Date: 04 / 21 / 11	<input type="button" value="Upload Document"/>
	Description: <input type="text"/> File: <input type="text"/> <input type="button" value="Browse..."/>	
- .....   03/18/11 SPRINGS_EMH   <input type="button" value="v"/> 3 Items		

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 CATEGORY	DOCUMENT SUB-CATEGORY	DOCUMENT TYPE
<b>Application/Eligibility</b>		
<b>General Eligibility - GE</b>		
<b>AP</b> - Application <b>AG</b> - Date of Birth/Age <b>OT</b> - Other	<b>CI</b> - Citizenship/Alien Status <b>VT</b> - Veteran	<b>SS</b> - Selective Service <b>IM</b> - Affidavit of Immigration Status
<b>Dislocated Worker- DW</b>		
<b>PC</b> - Plant Closure <b>SE</b> - Self Employed/Business Closed <b>PR</b> - UI Profiled	<b>SL</b> - Substantial Layoff <b>DH</b> - Displaced Homemaker <b>OT</b> - Other	<b>LU</b> - Layoff/UI/Unlikely to Return <b>GC</b> - General Announcement of Closure
<b>Youth Income - IN</b>		
<b>TA</b> - TANF <b>IN</b> - Income <b>FC</b> - Foster Child <b>OT</b> - Other	<b>RA</b> - Refugee Assistance <b>FS</b> - Food Stamps <b>ID</b> - Individual with Disability	<b>SI</b> - Supplemental Security Income <b>HR</b> - Homeless/Runaway <b>5P</b> - 5% Window
<b>Youth Barrier - YB</b>		
<b>BS</b> - Basic Skills Deficient <b>PY</b> - Pregnant/Parenting	<b>DO</b> - Drop Out <b>OF</b> - Offender	<b>HC</b> - Homeless/Runaway/Foster <b>ND</b> - Needs Assistance
<b>Adult - AD</b>		
<b>IN</b> - Income	<b>RE</b> - Residency	<b>OT</b> - Other
<b>Other - OT</b>		
<b>CE</b> - Complaint Procedure/EEO	<b>RI</b> - Release of Information	<b>OT</b> - Other
<b>Core Services</b>		
<b>BA</b> - Bonding Assistance <b>FL</b> - Follow-Up <b>PG</b> - Planned Gap <b>VG</b> - Vocational Guide <b>FS</b> - File Search <b>JD</b> - Job Development <b>JW</b> - Job Search Workshop <b>RC</b> - Resource Center <b>RW</b> - Refer to WIA Training <b>UN</b> - Employed (Locally Defined)	<b>EO</b> - Equal Opportunity Notice <b>IA</b> - Initial Assessment <b>RP</b> - Resume Prep <b>CC</b> - Connecting Colorado Orientation <b>HK</b> - Hurricane Katrina <b>JR</b> - Job Readiness <b>LT</b> - Refer to Local Training <b>RS</b> - Refer to Supportive Services <b>TC</b> - Tax Credit	<b>ED</b> - Employment Development Plan <b>LM</b> - Labor Market Information <b>TS</b> - Testing <b>CM</b> - Case Management (Not WIA) <b>JC</b> - Job Finding Club <b>JS</b> - Job Search Assistance  <b>KI</b> - Refer to Federal Training <b>TV</b> - Transition Assistance (Vet) <b>OT</b> - Other
<b>Intensive Services</b>		
<b>CA</b> - Comprehensive Assessment <b>KT</b> - Key Train <b>SU</b> - Subsistence Payments <b>WJ</b> - Non-ES Job Search	<b>CS</b> - Counseling <b>OA</b> - Out of Area Search <b>WE</b> - Work Experience <b>WU</b> - Unpaid Work Experience	<b>IE</b> - IEP Development <b>PV</b> - Pre-Vocation Services <b>WK</b> - Work Keys
<b>Supportive Services</b>		
<b>CO</b> - Counseling <b>HM</b> - Health/Medical <b>RL</b> - Relocation <b>TR</b> - Transportation	<b>DR</b> - Disaster Relief <b>NR</b> - Needs Related <b>SA</b> - Substance Abuse	<b>FC</b> - Family Care <b>RA</b> - Rent Assistance <b>SS</b> - Other
<b>Training Services</b>		
<b>AE</b> - Adult Literacy Education <b>CU</b> - Customized Training <b>UP</b> - Skill Retrain/Upgrade	<b>ET</b> - Entrepreneurial Training <b>OC</b> - Occupational Skills <b>OT</b> - Other	<b>CT</b> - Certificate <b>OJ</b> - On-the-Job Training
<b>Other Youth Services</b>		
<b>AM</b> - Adult Mentor <b>CG</b> - Comprehensive Guide Counseling <b>LN</b> - Literacy/Numeracy <b>WR</b> - Work Ready Skills <b>OT</b> - Other	<b>AS</b> - Alternative School <b>IN</b> - Incentive Payments <b>SE</b> - Summer Employment <b>WU</b> - Unpaid Work Experience	<b>BS</b> - Basic Skills <b>LD</b> - Leadership Skills <b>TG</b> - Tutoring <b>YW</b> - Work Readiness Goal
<b>TAA/TRA</b>		
<b>CS</b> - VTP/OJT Plan <b>RT</b> - Relocation Travel Reimbursement <b>TP</b> - Tutor Proposal <b>AA</b> - ATAA Application <b>IW</b> - Initial Wavier <b>WD</b> - Wavier Denial <b>AU</b> - Training Authorization <b>OT</b> - Other	<b>JA</b> - JSA Approval <b>CR</b> - VTP/OJT Change Request <b>MT</b> - Miscellaneous Training <b>DF</b> - TRA Deadline Form <b>AW</b> - All Wavier Renewals <b>JC</b> - Job Contacts <b>GT</b> - Grades/Transcripts	<b>RA</b> - Relocation Allowance Approval <b>AR</b> - Advance/Reimbursement Request <b>WN</b> - TRA Waiver Notice <b>BP</b> - TRA Benefit Payment Authorization Form <b>WR</b> - Wavier Revocation <b>SD</b> - Support Documentation <b>JO</b> - Job Order Screen Printouts
<b>Follow-Up/Post Program</b>		
<b>Q1</b> - First Quarter Follow-Up <b>OB</b> - Certificate Obtainment <b>CR</b> - Consent to Release Information	<b>Q2</b> - Second Quarter Follow-Up <b>TM</b> - Termination Form <b>OT</b> - Other	<b>Q3</b> - Third Quarter Follow-Up <b>EL</b> - Exit Letter

**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.

The screenshot shows a web interface for document scanning. It features three main sections for document types: TAA/TRA, OTHER OR LOCAL, and FOLLOW-UP/POST PROGRAM. Each section has a 'Type' dropdown menu, a 'Document Date' field, and a 'Description' field. A central dropdown menu is open, listing various document codes such as 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 Auth Form, IW - Initial Waiver, AW - All Waiver Renewals, WR - Waiver Revocation, WD - Waiver Denial, JC - Job Contacts for Waiver Renewal, SD - Support Documentation, AU - Training Authorization, GT - Grades/Transcripts, JO - Job Order Screen Printout, and OT - Other. To the right of each section is an 'Upload Document' button. At the bottom, there is an 'Enter New SSN:' field and a 'Go To Applicant' button. A 'Scanning Menu' label is centered below the SSN field.

This screenshot is identical to the one above, but a red arrow points from the 'TP - Tutor Proposal' option in the central dropdown menu to the text block below.

**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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