New I-trac Upload Tool Training for EOP

March 2022

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systems

Agenda

- Why new tool?
- How to search for document
- How to upload
- Review
- Permission levels
- Staff notifications
- How to attach
- Questions

Why New Tool?

1 Shared Filing Cabinet for eligibility & performance

2 Increased security and PII protection

General Staff Procedures

1. *Confirm* the customer enrollment episode has been added or already exists.

2. *Search* customer documentation to determine which documents are already saved or needed based on the grant policies.

3. *Coordinate* with the customer to decide which documents are needed and how best to upload missing documents.

4. *Upload* or request the customer uploads the documents.

5. *Review* the uploaded documents.

6. *Attach* an enrollment episode to the document so users know the document is being used for enrollments in the I-Trac system and cannot delete the document.

Permission Levels

	Read Only (Partners/Funders)	Limited Data Entry (Partners)	Full Data Entry (Grant Funded Staff)	
Action Buttons, Links & Icons (visible/clickable)				
Show/Hide Buttons	X	X	X	
Upload Button	--	--	X	
Review Button	--	--	X	
Select Button	--	--	X	
Delete Button	--	--	Before review	
Attach Button	--	--	After review	
Functionality & Permissions-Based Rules				
Search / Search Results	X	X	X	
Upload Documents / Request Customer Uploads	--	--	X	
Open Document Details Pop-Up – *Before Review*	--	--	X	
View Document Image	--	--	X	
View Full Document Number	--	--	X	
Edit Document Details	--	--	X	
Delete Document	--	--	X	
Complete Review	--	--	X	
Open Document Details Pop-Up– *After Review*	--	--	X	
View Document Image	--	--	--	
View Full Document Number	--	--	--	
Edit Document Details	--	--	--	
Delete Document	--	--	--	
Open Document Details Pop-Up – *After Enrollment Attached*	--	--	X	
View Document Image	--	--	--	
View Full Document Number	--	--	--	
Edit Document Details	--	--	--	
Delete Document	--	--	--	
Attach Enrollment to Document	--	--	X	
View Notes After Attachment	--	--	X	
Edit Notes After Attachment	--	--	--	
Remove Enrollment from Document After Attachment	--	--	--	

Purpose of Review

1. **Validate the Uploaded Image is Not Corrupt**
Between preview and final upload, an error could occur.

2. **Accuracy**
A double check to make sure the document details are accurately captured in the data fields. Other staff or programs may rely on this document's review later.

3. **Reviewer Attestation**
The reviewer is attesting that the content is accurate, and their name stored.

4. **Hide Elements**
The document image and full document number are hidden from most users for added security.

5. **Required to Attach Enrollment to a Document**

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Document Details Pop-up Before Review

Document image and number are not hidden and user enters document details before completing the review.

Full Data Entry
Permissions

View after Review

Customer Email

Kim   has sent you a request for documentation

SU Secure Upload <NoReply@secureupload.org>
To I-Trac Support

↩ Reply   ⟲ Reply All   → Forward   ··

Thu 4/2/2020 10:35

Hello Otho,

Kim sent this request for you to upload required eligibility documents securely. If you have questions, concerns, or issues, please contact:

Staff Name
Staff Email

Message from Kim:
Hello Otho, As we discussed on the phone, I need you to submit a picture or scan of your DD-214 and Driver's License, so I can verify eligibility into the program. Thank you,
Staff Member

The link below will direct you to our secure upload web form. Please click the link or copy the URL and paste it into your web browser.
https://www.secureupload.org/Documents/CustomerUpload.aspx?q=N5536Y&v=LE5D2DB5B-E468-4B34-86EA-E9A4846BC6E4U

This link will expire in 24 hours (Apr 3 2020 10:35AM). If you need a new link generated, please contact the staff person named above.

If you have received this notification in error, please delete and ignore.

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Staff Email Notification of Customer Upload

Dale Test (Customer ID 1523844) has submitted secure files for you to review.

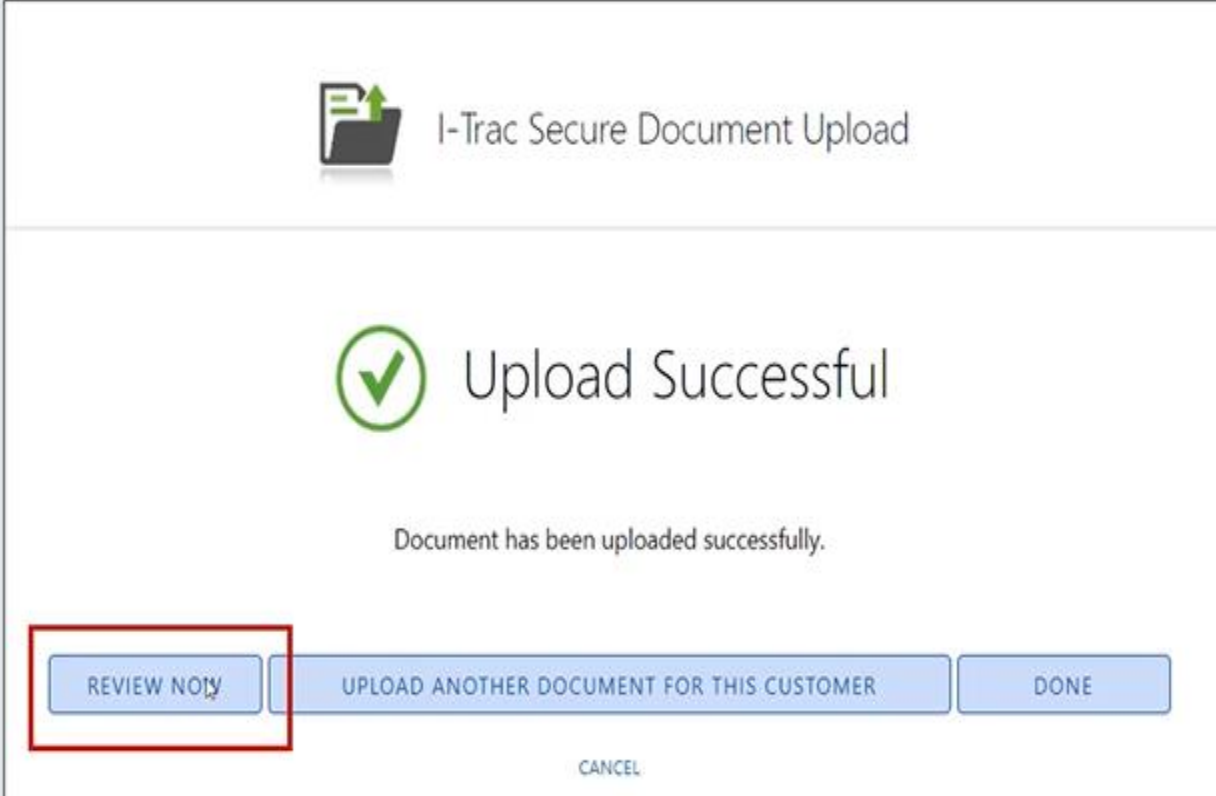SU Secure Upload <NoReply@secureupload.org>
To

↩ Reply   ↩ Reply All

Dale Test (Customer ID 1523844) has submitted secure files for you to review.

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Staff Prompt After Upload

I-Trac Secure Document Upload

✓ Upload Successful

Document has been uploaded successfully.

REVIEW NOW | UPLOAD ANOTHER DOCUMENT FOR THIS CUSTOMER | DONE

CANCEL

I-Trac Pop-up

Attached Enrollments Pop-up After Attachment

Can click attach button to view notes. No edit abilities.

Attached Enrollments - Identification (Driver's License) ✕

Select the customer's enrollments to attach it to this document
Unselecting will remove attachments.

☐ DWG Disaster (Fires) - WS Grants Pass (02/10/2022)

☐ DWG Sector Partnership - WSPM N/NE (07/01/2015)

☐ BTWO2 - WSO Medford TJC (05/15/2015)

☐ DWG DWT - WSO Medford TJC (05/11/2015)

☐ LOA Rough N Ready - WS Grants Pass (05/10/2015)

☐ WorkSource DW - EDIT to your provider (05/04/2015)

☑ WorkSource DW - WS Medford (05/04/2015)

DOB Validation

☐ WorkSource DW - WSPM N/NE (05/04/2015)

[Save]   [Cancel]

ta Entry

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Recap- What is different?

- Longer list of documents to upload for eligibility and performance purposes
- New Customer Documentation green tab
- Ability to take photo of the document- no need to save it
- Can only upload JPEG and PNG files (convert at online-convert.com)
- Can not see full document number after review
- Can not see document image after review

Questions?