

New I-trac Upload Tool Training for EOP



March 2022

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

	<u>Read Only</u> (Partners/Funders)	<u>Limited Data Entry</u> (Partners)	<u>Full Data Entry</u> (Grant Funded Staff)
<u>Action Buttons, Links & Icons (visible/clickable)</u>			
Show/Hide Buttons	X	X	X
Upload Button	--	--	X
Review Button	--	--	X
Select Button	--	--	X
Delete Button	--	--	Before review
Attach Button	--	--	After review
<u>Functionality & Permissions-Based Rules</u>			
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**

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

Document Details

Customer Name	Adarsh Test	Reviewer Name	Cindy Manning
Document Type	Military Separation Record (DD-214)	Review Date	2/17/2022
Document Number		Reviewer Notes	
Issue/Effective Date			
Issued By			
Expiration Date			

Document Image: Document B

Buttons: Complete Review, Cancel

View after Review

The screenshot shows a software interface with a modal window titled "Document Details". The modal contains the following information:

Customer Name	Adatest Test	Reviewer Name	Jm I-Trac System Administrator
Document Type	Identification (Driver's License)	Review Date	2/15/2022
Document Number	***4567	Reviewer Notes	
Issue/Effective Date	2/1/2022		
Issued By	OR DMV		
Expiration Date	2/1/2028		

Below the details is a large grey box with a placeholder image icon and the text "REVIEW COMPLETE". A "Close" button is located at the bottom of the modal.

Customer Email

Kim has sent you a request for documentation



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-E9A48468C6E4U>

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.

Staff Email Notification of Customer Upload

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



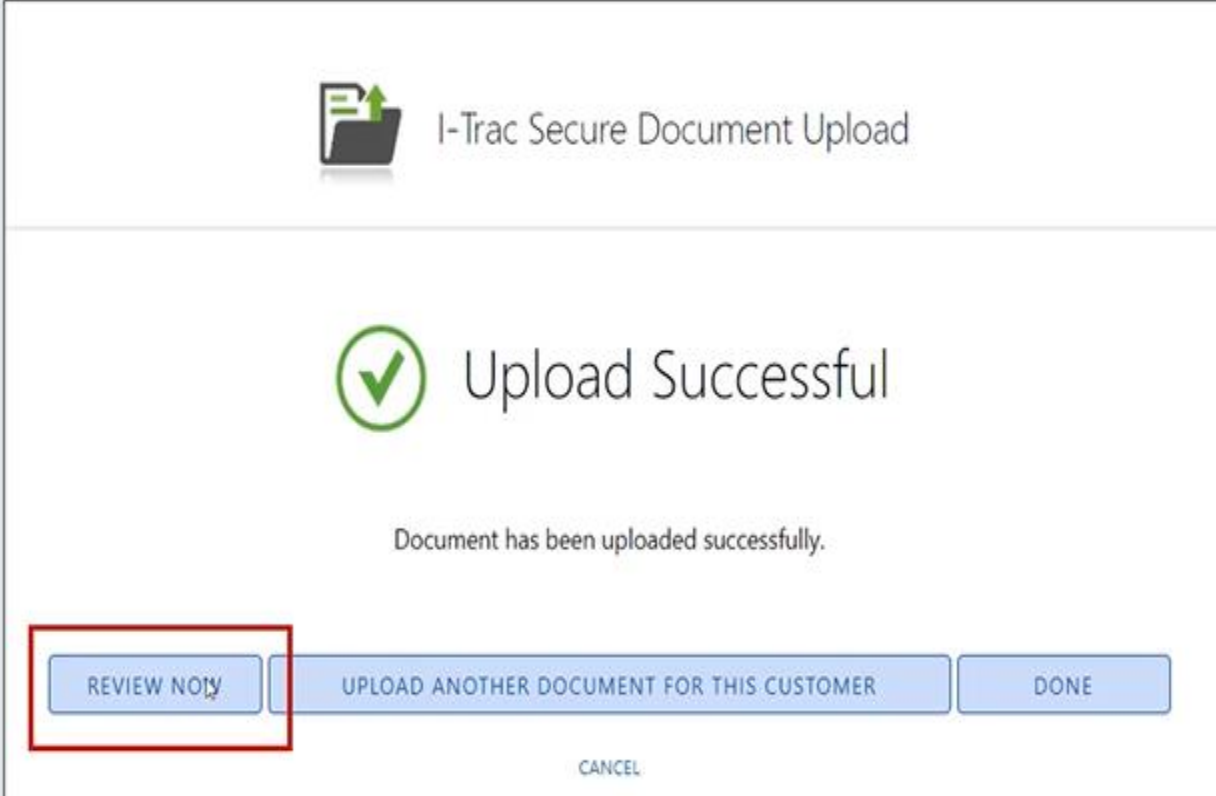
Secure Upload <NoReply@secureupload.org>
To

 Reply


 Reply All

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

Staff Prompt After Upload



I-Trac Secure Document Upload

 Upload Successful

Document has been uploaded successfully.

REVIEW NOW | |

CANCEL

The image shows a software dialog box titled "I-Trac Secure Document Upload". It features a green checkmark icon and the text "Upload Successful". Below this, it states "Document has been uploaded successfully." At the bottom, there are three buttons: "REVIEW NOW", "UPLOAD ANOTHER DOCUMENT FOR THIS CUSTOMER", and "DONE". The "REVIEW NOW" button is highlighted with a red rectangular border. A "CANCEL" option is also present at the bottom center of the dialog.

I-Trac Pop-up

The screenshot shows the I-Trac website interface. At the top, there is a navigation menu with tabs: Home, I-Trac, Customer Documentation, Workshops, Resources, Batch Entry, WEX Bank, and Reports. The main content area features a "Welcome to I-Trac" heading, followed by the subtitle "A Comprehensive Management Information System for Workforce Development Programs". Below this, there are two bullet points providing instructions on how to use the system and where to find technical support. A section titled "WorkSource Center Users" contains two more bullet points regarding login and support. At the bottom of the main content area, there is a copyright notice: "I-Trac is a service of Worksystems, Inc. ©2006-2016". A red arrow points from the bottom left of the main content area towards a notification pop-up at the bottom of the page. The pop-up is a yellow bar with a blue bell icon on the left, containing the text "You have documents to review. Go to the [Customer Documentation](#) tab." and a "Close" button on the right.

Home I-Trac Customer Documentation Workshops Resources Batch Entry WEX Bank Reports

Welcome to I-Trac

A Comprehensive Management Information System for Workforce Development Programs

- Use I-Trac's tabs to navigate through and use the system.
- Configure your browser for www.i-trac.org to allow pop-ups.
- If you require I-Trac technical support please email support@i-trac.org.

WorkSource Center Users

- Click [here](#) to access the login for WOMIS in a new window.
- For WOMIS support, contact your local area's OED Regional Technician or email helpdesk@emo.state.or.us.

I-Trac is a service of Worksystems, Inc. ©2006-2016.

You have documents to review. Go to the [Customer Documentation](#) tab. Close

Attached Enrollments Pop-up After Attachment

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

ta Entry
missions

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)

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?