

Worksystems

Customer Documentation Upload

System Manual



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About

Functionality described in this manual allow staff (and customers) to upload documents that are used to validate data recorded and reported to funders. These documents may contain Personally Identifiable Information (PII) and this functionality allow staff to upload specific documents or send customers a link to upload specific documents into I-Trac securely and then attaches those documents to an individual I-Trac customer record and allows staff to link them to specific enrollments.

Shared Electronic File Cabinet

It is our collective hope to better serve customers. In a traditional grant management and ‘paper world,’ a customer may be asked multiple times to provide a single document because each program requires it. The goal with this electronic file cabinet is to only require a new document uploaded where the document has not already been uploaded and to allow any program to benefit from the documents already in the system. We are relying on all system users with appropriate [permissions](#) to fill this electronic cabinet. The cabinet may be used across funds, local areas and other I-Trac licensees.

Security

This system is offering tools that allow staff to securely upload and store eligibility and performance related documents that contain sensitive information and PII. All document images and the Document Numbers captured in data fields are encrypted and scrambled as soon as they are uploaded. After [upload](#) and [review](#) there are a very limited number of users who have [permissions](#) to view the document again.

Users will be unable to print documents and right click is disabled to make it harder to save an image to a local hard drive. **While the system cannot prevent users from taking screen shots, it is strictly prohibited.**

User Misuse or Misrepresentation

Falsifying data or misrepresenting data in I-Trac is fraud and a misuse of program funding. Using your access levels to acquire and/or share information about an I-Trac customer that is not for allowable business purposes is strictly prohibited and will result in account termination. All terms of use are outlined in the I-Trac User Requirements and Agreements Policy. Users can review this policy by logging into I-Trac and clicking [user account](#) link in the upper right corner.

Handling Sensitive Documents

There are correct and incorrect ways to handle documents containing sensitive information and the images uses. The purpose of this upload tool is to limit the incorrect ways of handling sensitive information; however, I-Trac System Administrators cannot stop staff misuse. Below are some valuable tips and we rely on Grant Administrators to help enforce these requirements:

1. Never email a document containing sensitive information or PII.
2. If scanning document images:
 - a. Talk to your network engineer to confirm security.
 - b. Scanners that email the document image to you, may not be secure. Many employer email systems are cloud-based. Sending an image to a cloud-based email is similar to emailing person-to-person and is not recommended.
 - c. Scanners that are hard wired to your device or are storing images on the same secure network ***may*** be secure.

3. It is recommended that staff first consider the customer upload option. If that is not an option, it is strongly encouraged staff use a device with a camera. These camera upload options allow staff to capture an image with the camera and upload securely, without needing to save the document's image to the device.
4. If you scan or take a picture of a document and save it to the device for file upload, please be sure the image is deleted from the device after upload.

Grant Policies for Documentation Requirements

Grants that require data elements have backup documentation should have a policy that describes the documents that are needed and why they are needed. Staff should assess whether the customer has already uploaded this document, whether the document is expired (if applicable) and determine whether they need to upload other documents to meet the requirements of their program.

General Procedures

This functionality offers plenty of options for uploading. Whether staff is uploading or staff is requesting a customer to upload a document or whether the upload is on the device the staff is working on, a secondary staff device, or a secondary customer device; and whether the document can be captured by the device camera or is already stored on the device for upload. All of these options really follow a general set of business 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.



Permissions

I-Trac is a permissions-based system and the permissions to view, edit, upload, review and update documentation details is also permissions-based and uses staff provider permissions to determine access and function.

Current Enrollment Episode

The system is looking at the searched customer and the user's individual permissions to any of the enrollments that customer has and whether those customer enrollments have exceeded their post-exit follow-up or performance tracking periods. It may help to break this down further and provide more definitions:

Enrollment Episodes Defined

Every enrollment a customer is enrolled in consists of a service provider, important enrollment dates (application, registration, participation, exit), a set of program services during enrollment, and sometimes a period after exit for follow-up and performance tracking. Users can distinguish each enrollment episode by the rows on the providers tab.

Current Enrollments Defined

Current enrollment means the customer enrollment has not yet been locked which happens after exit and when the follow-up or performance period has ended. Data entry and admin users can tell the record is locked because they cannot enter or edit data in the enrollment episode even though they have permissions to select the enrollment.

Individual Permissions Levels to the Customer's Current Enrollments

A user's [permissions levels](#) may vary by fund; therefore, a staff working with a customer may find they have different permissions levels by fund enrollment. Where a user has read only to one current enrollment and full data entry to another, their permissions in customer documentation will align with the full data entry permissions. Likewise, if a user has read only to the current enrollment and full data entry to enrollments that are no longer current, then their customer documentation permissions for this customer will reflect those of a read only user.

Permissions Levels

Documentation is generally a task for system users that are responsible for eligibility and performance tracking in the grant; therefore, customer documentation functionalities are permissions-based. These general guidelines help to specify what staff can or cannot do as it relates to the customer documentation functionality.

*Users can review their own permission. Click the [user account](#) button in the upper right corner of I-Trac when logged in. Scroll down to see all your fund/provider permissions.



Figure 1 - User account button.

See the [Permissions Chart](#) for more clarity about each of these permissions levels and how they can use this functionality.

Read Only

These are generally designated for some funders or community partner staff that have permissions to only view customer records. This means the staff has read only to all the customer's [current enrollment episode](#).

**User's Fund/Provider Permissions: I-Trac Access = Read Only*

Limited Data Entry

These are generally partner staff with limited data entry abilities to at least one of the customer's [current enrollment episode](#). These users do not have the ability to complete registration or documentation in any of the customer's current enrollment episode. Where WIOA Adult/DW funds, this is generally OED, DHS, TAA or other community organizations with limited data entry access.

** User's Fund/Provider Permissions: I-Trac Access = Case Worker or Data Entry **and** Reg Access= Read Only*

Full Data Entry

These are generally case workers responsible program reporting, including registration and/or performance for at least one of the customer's [current enrollment episode](#). This is going to be grant funded staff. Where WIOA Adult/DW/DWG/Youth funds, this is Title I staff only.

** User's Fund/Provider Permissions: I-Trac Access = Case Worker or Data Entry **and** Reg Access= Case Worker or Data Entry*

Admin

These are generally Grant Administrators responsible for grant oversight and they must have admin level permissions to at least one of the customer's [current enrollment episodes](#). Their permissions allow them to modify data that is locked. They are typically the local area board staff or designated grant administrator for non-board licensees.

** User's Fund/Provider Permissions: Reg Access= Admin*

Monitors

These are individuals tasked with monitoring customer records for data validation and documentation. They are given a special temporary permission role for read only access to customer records and customer documentation.

** User has Special Role = Monitor and Read Only Provider Permissions.*

i USER PERMISSIONS VARY FROM GRANT-TO-GRANT.

If you have read only level permissions to one current service provider enrollment for a customer, but limited data entry to another current enrollment, then you will have the limited data entry level permissions in customer documentation. If you have full data entry level permissions to any of the enrollments, then you will have that level of permissions in Customer Documentation functionality.

Permissions Chart

The charts below is intended to help to specify [permissions levels](#) and are specific to the customer’s [current enrollment episodes](#). The chart describes action buttons, links, icons and buttons by user type and whether these buttons are visible/clickable for the user. It also helps to identify the users that have access to certain functionality and related permissions-based rules.

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

Document Details & Data Field Definitions

For every document type, there are details that will be recorded by staff to support the document image. The following data fields are presented throughout customer documentation. Where data fields are blank in the database, it is because it is not required for the specific document type, or it was not required at the time of upload. To view required fields by document type, visit the [Document Types Tab](#).

This chart helps to explain where users can view, add, or edit the field if they have appropriate permissions.

1. **Search Tab:** Most data fields are viewable from the Search Tab so I-Trac users can view which documents are in the electronic file cabinet for this customer.
2. **Staff Upload:** While users are uploading documents, they are asked to add the required data elements. Only users with appropriate [permissions](#) can upload documents.
3. **Document Details Pop-Up:** The Document Details Pop-up is where documents are edited. Who can edit document data fields and are based on the user’s permissions and whether the document has been reviewed or enrollments attached. See the [permissions chart](#) for clarity.
4. **Attached Enrollments Pop-up:** This is where specific enrollment episodes are attached/associated with a specific customer document.

Data Field	Description	<u>Search Tab</u>	<u>Staff Upload</u>	<u>Document Details Pop-Up</u>	<u>Attached Enrollments Pop-Up</u>
Attached Enrollments	This field reflects all the enrollments attached to the document. In other words, it specifies the enrollments that are using this document as backup documentation for their customer’s enrollment episode. This is manually added after the review is complete. See Attached Enrollments Field for more detail.	View	--	--	Add/Edit/Delete
Attached Enrollment Notes	When an enrollment is attached to a document, it may be helpful to further explain why it will be attached to that specific enrollment. For example, Identification may be linked to an enrollment to validate DOB. See Notes for more detail.	--	--	--	Add/Edit/Delete
Document Image	The image that is uploaded by staff or the customer. This image is reviewed and then hidden from most users for security purposes.	--	Add	--	--
Document Number	The unique identifier of the document. This number varies by document and may not be required for some document types. This is manually entered by staff during upload or during review.	--	Add	Edit	--

Data Field	Description	<u>Search Tab</u>	<u>Staff Upload</u>	<u>Document Details Pop-Up</u>	<u>Attached Enrollments Pop-Up</u>
Document Type	See Documentation Types Tab to view all the documentation types that can be uploaded to I-Trac. All photos/images of documents should align with the document type. Staff should never identify a document as document type that it is not. New document types can be added to the system if approved by Grant Administrators and I-Trac System Administrators. The document type is chosen during staff upload or when staff request an upload from a customer. The document type can be edited during the review if incorrect.	View	Add	Edit	--
Expiration Date	The date the document expires. Some documents may not ever expire. This is manually entered by staff during upload or during review	View	Add	Edit	--
Issue Date	The date the document was issued. This is captured so staff can know if the document existed at the time the program needed it. This is manually entered by staff during upload or during review.	View	Add	Edit	--
Issued By	The agency, school, organization, or other entity that issued the document to the customer. This is manually entered by staff during upload or during review.	View	Add	Edit	--
Reviewed By	The reviewer that that completes the review. This is captured automatically when the review is completed.	View	--	--	--
Review Notes	Any notes related to the document that are not captured in data fields.	--	--	Edit	--
Staff Request	The staff person that requested the document. This is specifically relevant to customer uploads . This is captured automatically when the document is requested and then uploaded.	View	--	--	--
Uploaded By	The person that uploads the document. This can be staff or the customer. This is captured automatically when the document is uploaded.	View	--	--	--



Search Tab

This tab allows all I-Trac users to search and view documentation that has been uploaded. Search results present all the uploaded documents matching the search criteria. This tab contains multiple [action buttons](#) which are [permissions-based](#) and are used for all upload functionalities. From search results, staff can [upload](#) documents, select to view [document details](#), [review documents](#), and [view/attach enrollments](#) to the customer's documents.

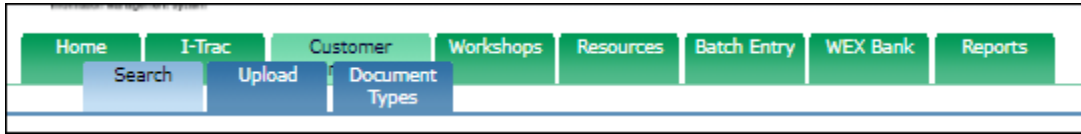


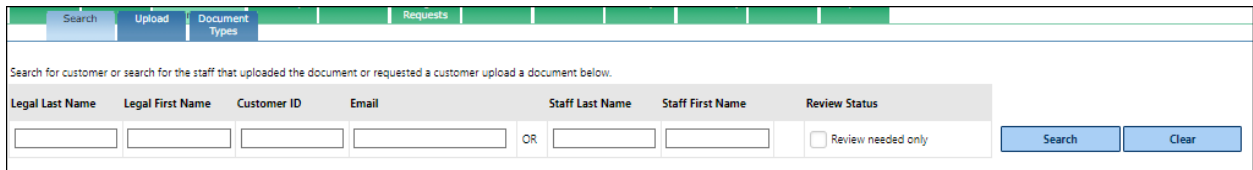
Figure 2 - Green Customer Documentation tab / blue Search tab.

Search Options

Staff may choose to search for customer documentation two ways.

Search Control

Users can go to the Customer Documentation/Search tab directly to search using the search control. There are multiple search fields and searching is similar to searching for customers in I-Trac and [search results](#) will appear below the search.



Search for customer or search for the staff that uploaded the document or requested a customer upload a document below.

Legal Last Name	Legal First Name	Customer ID	Email	OR	Staff Last Name	Staff First Name	Review Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Review needed only

Figure 3 - Search control.

a. Searching by Customer Elements

This option is best when searching for a specific customer. Search by Customer's Legal Last Name, Legal First Name, Customer ID or Email Address.

b. Searching by Staff Elements

These are meant to search for staff that uploaded or requested a document from the customer. These are the same individuals that would be prompted to complete a review. These options are great for Grant Administrator oversight. Search by Staff Last Name or Staff First Name.

c. Reviews Needed Only Filter

When this is checked and no other customer or staff elements are selected, then it will return the reviews you are prompted to complete as logged in user. Same results as from the yellow [I-Trac pop-up](#).

When this box checked with other customer or staff search elements, it will return all the reviews needed which meet the search elements. This is also great for Grant Administrator oversight.

Search From Customer Record

Staff may choose to search customer documentation from within a customer's I-Trac record. This is helpful when already working in a customer's record. Below are the steps to search:

1. Click the **Tools** menu in the header of the customer's record

find_customer | providers Logged in as: jmedhaug: Jm I-Trac System Administrator (none,none)

Legal Name: Ada.test Test (I-Trac Customer ID: 1529401)
 Other/Preferred Name: (not specified) Pronouns: (not specified) customer documents menu | **tools**

WIOA Youth - Department of Youth Services - Serbu JJ Center, EID = 2202072

add	Providers	Application Date	Registration Date	Participation Date	Exit Date
edit	WIOA Youth - Department of Youth Services - Serbu JJ Center	2/2/2022			

2. Select **Search Customer Documentation** link

Tool Menu

- Login as Customer in My WorkSource
- **Search Customer Documentation**
- Print Page
- Support

3. The system will automatically take the user to the **Customer Documentation / Search tab** and execute a search based on the Customer ID.

Search for customer or search for the staff that uploaded the document or requested a customer upload a document below.

Legal Last Name | Legal First Name | Customer ID | Email | Staff Last Name | Staff First Name | Review Status

hide all documents

Customer Name	Customer ID	Birth MM/DD	Recent Fund Activity
Ada.test Test	1529401	04/15	WIOA Youth

Document Type	Issue Date	Issued By	Expiration Date	Staff Request	Uploaded By	Reviewed By	Attached Enrollments
Identification (Driver's License)	2/2/2018	Oregon DMV	2/2/2026		Jm I-Trac System Administrator (staff)		
Birth Certificate	1/1/1980	Clackamas County			Jm I-Trac System Administrator (staff)		
CASAS Goals	2/3/2022	CASAS			Jm I-Trac System Administrator (staff)	Jm I-Trac System Administrator	attach • WIOA Youth - Serbu JJ Center
GED	2/2/2022	CCC			Jm I-Trac System Administrator (staff)		

Search Results

The search results will show the user all customers matching the search criteria. It will also show all the document types uploaded for each customer that is returned in these results. Each unique customer record has a unique Customer

DUPLICATE CUSTOMER

If a single customer record has duplicate customer records in I-Trac, be sure to upload documents to the correct customer record. It may be appropriate to merge the customer records. Talk to your Grant Administrator.

ID. Below each customer's Name, are the list of documents that are already uploaded.

Figure 4 - Name search results in multiple customer records that match the search criteria.

Action Buttons

All the action buttons listed below are permissions-based. See the [permissions chart](#) for clarity.

Figure 5 - Action buttons for a user with full data entry permissions to one or more of the customer's current enrollments.

Upload Button

This button is how all new documents are added to the database. When this button is clicked, the user is taken to the [upload tab](#). Only users with [full data entry](#) or [admin](#) level permissions will see this button.

Show/Hide Buttons

These buttons will expand/collapse all the documents for the individual customer record.

Review/Select Buttons

Both **Review** and **Select** buttons will open the details of the document type. Only users with [full data entry](#) or [admin](#) level permissions will see these buttons.

Review Button

The document **has not** yet been [reviewed](#). Click this button to open the [document details pop-up](#) in edit mode.

Select Button

The document **has** been [reviewed](#); therefore, the review button is replaced with a select button. Click this button to open the [document details pop-up](#).

Delete Button

This button will delete the document from the database. There are additional conditions to delete documents. Only users with [full data entry](#) or [admin](#) level permissions will see this button. Full data entry users will only see it before the document is reviewed. After review, only admin users will see this button. After an [enrollment is attached](#), admins cannot delete the document unless they [remove attached enrollment](#) first.

Attach Button

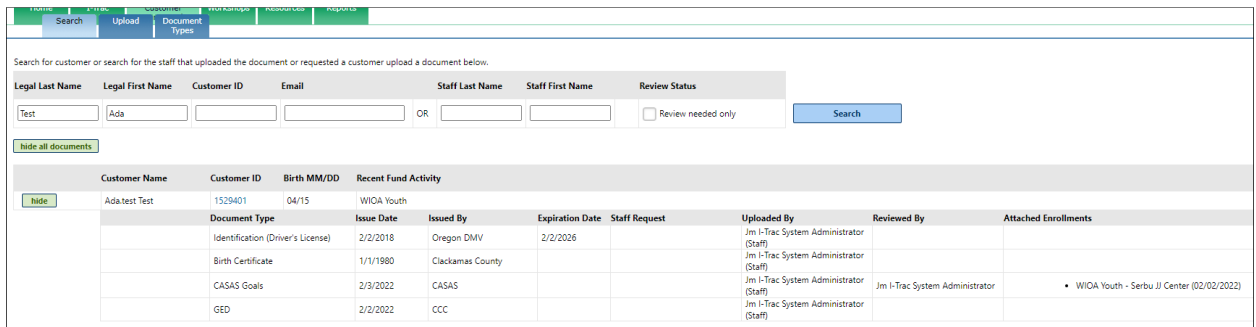
This allows users [attach an enrollment to a document](#). This is done manually by staff after [review](#) is complete. Only users with [full data entry](#) or [admin](#) level permissions will see this button.

Search Tab View by Permissions Levels

Because this page varies so much by user and their individualized permissions to the enrollments, it is difficult to specify every situation. Below are the general guidelines and example views that the typical user will see based on the customer they are working with.

Read Only & Limited Data Entry View

Users with [read only](#) or [limited data entry](#) permissions are typically users that are working for partnering organizations where the customer is shared. These individuals are not completing grant funded eligibility or performance tracking and would not have a need to upload, review or attach enrollments to documents. That said, these users really have a read only access to customer documentation. They only have the hide/show action buttons.



Customer Name	Customer ID	Birth MM/DD	Recent Fund Activity				
Ada.test	1529401	04/15	WIOA Youth				
Document Type	Issue Date	Issued By	Expiration Date	Staff Request	Uploaded By	Reviewed By	Attached Enrollments
Identification (Driver's License)	2/2/2018	Oregon DMV	2/2/2026		Jm I-Trac System Administrator (Staff)		
Birth Certificate	1/1/1980	Clackamas County			Jm I-Trac System Administrator (Staff)		
CASAS Goals	2/3/2022	CASAS			Jm I-Trac System Administrator (Staff)	Jm I-Trac System Administrator	• WIOA Youth - Serbu JJ Center (02/02/2022)
GED	2/2/2022	CCC			Jm I-Trac System Administrator (Staff)		

Figure 6 - Search page view for users with read only or limited data entry permissions to customer's current enrollments.

Full Data Entry

Users with [full data entry](#) level permissions are grant funded staff with a responsibility to complete grant eligibility or performance tracking. They need to upload, review and attach documents, but there are limitations to edit and delete documents after review.

Legal Last Name	Legal First Name	Customer ID	Email	Staff Last Name	Staff First Name	Review Status
		1529572		OR		<input type="checkbox"/> Review needed only

Customer Name	Customer ID	Birth MM/DD	Recent Fund Activity
Adatest Test	1529572	06/01	DWG Disaster (Fires), WorkSource DW (WS Medford), WorkSource DW (WSPM N/NE), WorkSource DW (EDIT to your provider)

Document Type	Issue Date	Issued By	Expiration Date	Staff Request	Uploaded By	Reviewed By	Attached Enrollments
Identification (Driver's License)	2/1/2022	OR DMV	2/1/2028	R02Reboot Train	Adatest Test (Customer)	Jm I-Trac System Administrator	• WorkSource DW - WS Medford (05/04/2015)
Training Provider Evaluation/Progress Report	2/1/2022	PCC			R02Reboot Train (Staff)	R02Reboot Train	
CASAS Goals	1/22/2022	Pee Wee's Playhouse			HF I-Trac System Administrator	HF I-Trac System Administrator	
Follow-up Survey (Signed)	1/1/2002	N/NE WorkSource			Adatest Test (Customer)	HF I-Trac System Administrator	
Quarterly Tax Payment Forms	1/1/2019	IRS			HF I-Trac System Administrator (Staff)	HF I-Trac System Administrator	
Birth Certificate	1/1/1980	Oregon State			HF I-Trac System Administrator	HF I-Trac System Administrator	• DWG Disaster (Fires) - WS Grants Pass (02/10/2022) • BTW02 - WSO Medford TIC (05/15/2015)
Identification (Government issued Photo ID)					HF I-Trac System Administrator	Adatest Test (Customer)	
Self-Photo					HF I-Trac System Administrator	Adatest Test (Customer)	

Figure 7 - Search page view for users with full data entry permissions to customer's current enrollments.

Admins

Users with admin level permissions are grant funded and are responsible for grant oversight. These users need to be able to do the same tasks as the full data entry user; however, they also need additional permissions to remove enrollment attachments and edit or delete document details after they've been reviewed if there is a mistake.

Legal Last Name	Legal First Name	Customer ID	Email	Staff Last Name	Staff First Name	Review Status
		1529572		OR		<input type="checkbox"/> Review needed only

Customer Name	Customer ID	Birth MM/DD	Recent Fund Activity
Adatest Test	1529572	06/01	DWG Disaster (Fires), WorkSource DW (WS Medford), WorkSource DW (WSPM N/NE), WorkSource DW (EDIT to your provider)

Document Type	Issue Date	Issued By	Expiration Date	Staff Request	Uploaded By	Reviewed By	Attached Enrollments
Identification (Driver's License)	2/1/2022	OR DMV	2/1/2028	R02Reboot Train	Adatest Test (Customer)	Jm I-Trac System Administrator	• WorkSource DW - WS Medford (05/04/2015)
Training Provider Evaluation/Progress Report	2/1/2022	PCC			R02Reboot Train (Staff)	R02Reboot Train	
CASAS Goals	1/22/2022	Pee Wee's Playhouse			HF I-Trac System Administrator	HF I-Trac System Administrator	
Follow-up Survey (Signed)	1/1/2002	N/NE WorkSource			Adatest Test (Customer)	HF I-Trac System Administrator	
Quarterly Tax Payment Forms	1/1/2019	IRS			HF I-Trac System Administrator (Staff)	HF I-Trac System Administrator	
Birth Certificate	1/1/1980	Oregon State			HF I-Trac System Administrator	Adatest Test (Customer)	• DWG Disaster (Fires) - WS Grants Pass (02/10/2022) • BTW02 - WSO Medford TIC (05/15/2015)
Identification (Government issued Photo ID)					HF I-Trac System Administrator	Adatest Test (Customer)	
Self-Photo					HF I-Trac System Administrator	Adatest Test (Customer)	

Figure 8 - Search page view for users with full data entry permissions to customer's current enrollments.

Monitors

These users have a temporary need to monitor customer enrollments. During that review, they are validating that backup documentation exists where it is required and need to be able to see all the document details, but they cannot edit or make changes to the information saved.

Legal Last Name	Legal First Name	Customer ID	Email	Staff Last Name	Staff First Name	Review Status
test	ada			OR		<input type="checkbox"/> Review needed only

Customer Name	Customer ID	Birth MM/DD	Recent Fund Activity
Ada-test Test	1529401	04/15	WIOA Youth

Document Type	Issue Date	Issued By	Expiration Date	Staff Request	Uploaded By	Reviewed By	Attached Enrollments
Identification (Driver's License)	2/2/2018	Oregon DMV	2/2/2026		Jm I-Trac System Administrator (Staff)		
Birth Certificate	1/1/1980	Clackamas County			Jm I-Trac System Administrator (Staff)		
CASAS Goals	2/3/2022	CASAS			Jm I-Trac System Administrator (Staff)	Jm I-Trac System Administrator	• WIOA Youth - Serbu JJ Center (02/02/2022)
GED	2/2/2022	CCC			Jm I-Trac System Administrator (Staff)		

Figure 9 - Search page view for users with monitor permissions to customer's current enrollments.

Upload Tab

This tab contains all the upload functionality. Any user with [full data entry](#) or [admin](#) level can complete a review. The system offers a few different options for uploading:

1. [Staff Upload: Upload a document from this device](#)
2. [Staff Upload: Upload a document from another device](#)
3. [Customer Upload: Send Document Upload Request](#)

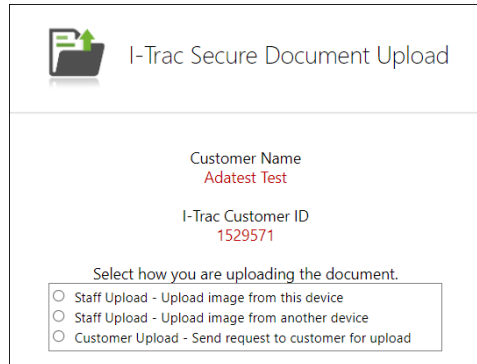


Figure 10 - Upload options.

Before Upload

Staff should view existing documents saved for the customer to determine which are needed. The customer must have a [current enrollment episode](#) and staff that will upload must have appropriate [permissions levels](#).

When ready to upload, click the [upload button](#) from the [search results](#).

Documentation Types (Tab)

For staff convenience, a current list of document types are listed on this tab. The required data fields are noted for each documentation type. This list may change; however, it can only change with Grant Administrator **AND** I-Trac System Administrator approval.

Document Type	Issue/Effective Date Required	Expiration Date Required	Document Number Required
Application (Signed Program Application)	Yes	No	No
Associates Degree	No	No	No
Bachelor's Degree	No	No	No
Baptismal Record	Yes	No	No
BEST Literacy	Yes	No	No
BEST Plus 2.0	Yes	No	No
Birth Certificate	Yes	No	No
CASAS Goals	Yes	No	No

Figure 11 - List of all current documentation types and the fields that are required.

Multiple Page Documents

Where a document is multiple pages, staff or the customers (as applicable), can upload multiple images for a single document type.

Staff Upload Options

Staff have two options to upload a document and it is dependent on the device they use:

1. [Upload image from this device.](#)
2. [Upload image from another device.](#)

How to Upload From This Device

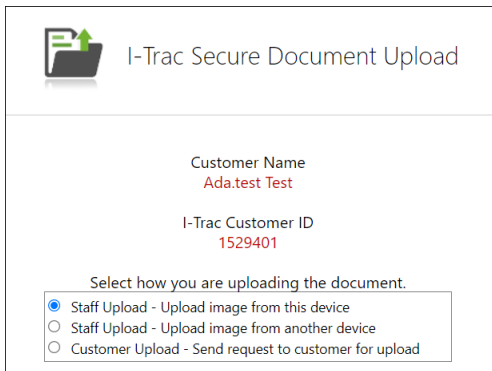
Users should select this option if they are in I-Trac from a device that already has an image of the document saved or the device is enabled with a camera to take a picture of the document.



SECURITY WARNING

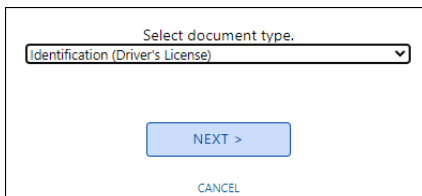
Staff are [handling sensitive documents](#) and should not store images of customer documents on their devices long term – especially mobile devices. It is recommended staff use a device with a camera enabled so the upload tool can use the camera to capture the image and the document is not stored on the device.

1. Select Staff Upload – Upload image from this device



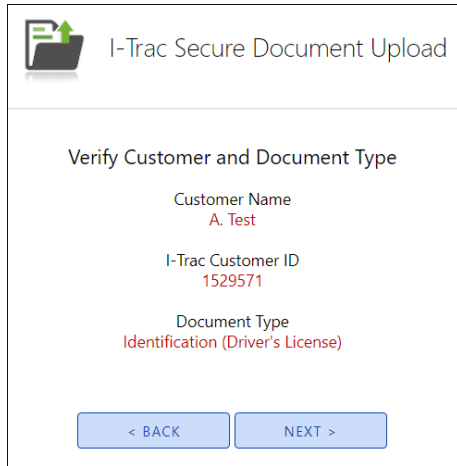
2. Select Document Type

Staff may only upload one document at a time, so must choose the document type for upload. Click next.



3. Verify Customer and Document Type

Staff are confirming their selections. Click next.



I-Trac Secure Document Upload

Verify Customer and Document Type

Customer Name
A. Test

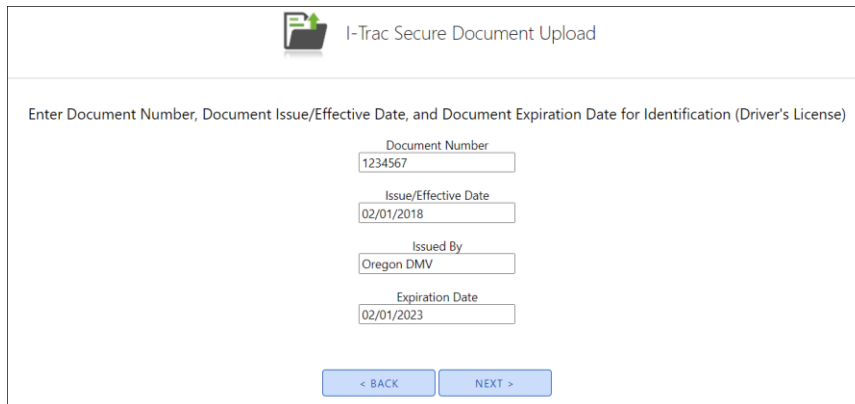
I-Trac Customer ID
1529571

Document Type
Identification (Driver's License)

< BACK NEXT >

4. Enter Document Details

Depending on the document type, there will be data points which should be data entered about the document. See [Documentation Related Data Fields](#) for more information.



I-Trac Secure Document Upload

Enter Document Number, Document Issue/Effective Date, and Document Expiration Date for Identification (Driver's License)

Document Number
1234567

Issue/Effective Date
02/01/2018

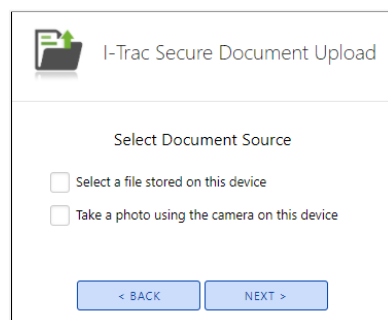
Issued By
Oregon DMV

Expiration Date
02/01/2023

< BACK NEXT >

5. Select Document Source (File or Camera)

There are two ways a staff can upload. Staff choose to select a file from this device or take a photo using the camera. Click Next.



I-Trac Secure Document Upload

Select Document Source

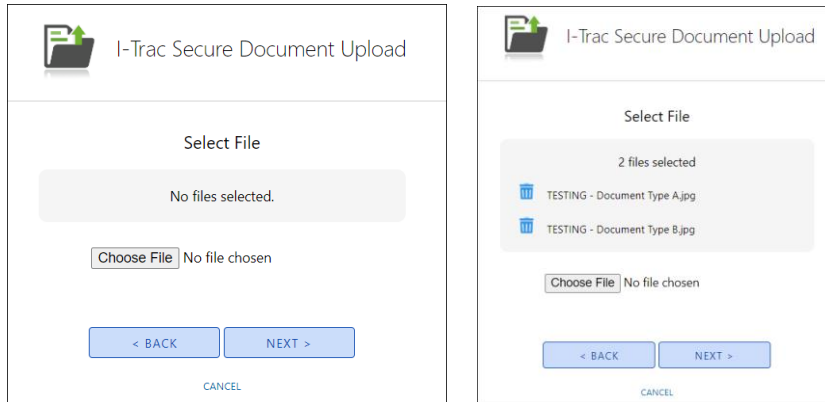
Select a file stored on this device

Take a photo using the camera on this device

< BACK NEXT >

a. Select image(s) stored on this device

Like standard upload tools, click choose file, browse system folders to select the correct document and select it. File type must be **JPEG** or **PNG** image. Users may choose up to 10 images per document type. Click next when all images are selected.

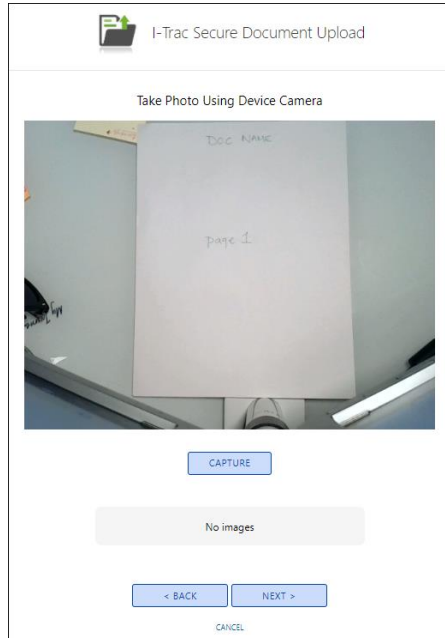


b. Take a photo using the camera on this device

The system will ask to use the camera if it hasn't already been authorized. When the camera is enabled, present the document in front of the camera, and use the viewer to center and wait for focus.

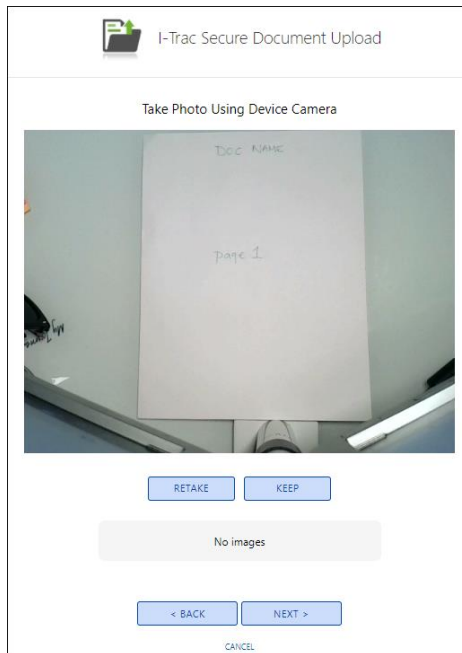
1) Capture Button

Staff uses the capture button to capture the image.



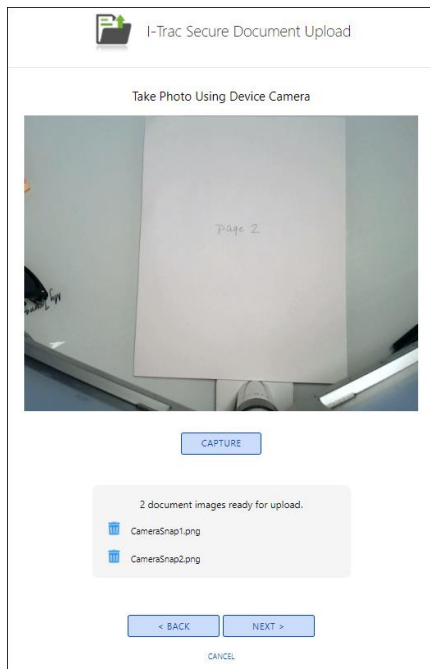
2) Retake & Keep Buttons

After an image is captured, users can retake the image or keep the image. When kept, the image will be listed in the **Selected Files** section.



3) Selected Files & Trash Icon

Once images are kept, they will appear in the selected files section as files added. Next to each image, there is a Trash Icon to delete the image from the list of added photos.

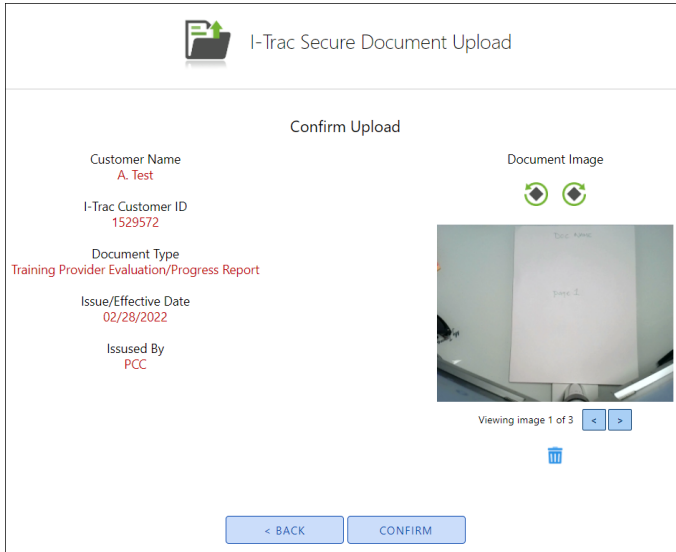


4) Next

Click when finished taking all pictures.

6. Confirm Upload

Once an image or file is chosen for upload and can be previewed before uploaded. Here, the user completes an additional check to confirm the information that will be uploaded to the database. Click confirm.



I-Trac Secure Document Upload

Confirm Upload

Customer Name
A. Test

I-Trac Customer ID
1529572

Document Type
Training Provider Evaluation/Progress Report

Issue/Effective Date
02/28/2022

Issued By
PCC

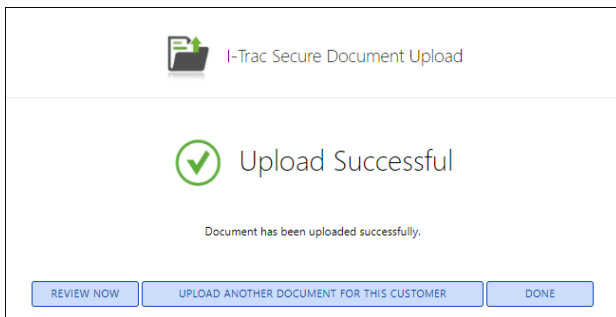
Document Image

Viewing image 1 of 3

< BACK CONFIRM

7. Upload Successful & Next Steps

When the upload is confirmed and complete, the system will generate a success message. The system will present the user with three buttons to choose from.



I-Trac Secure Document Upload

Upload Successful

Document has been uploaded successfully.

REVIEW NOW UPLOAD ANOTHER DOCUMENT FOR THIS CUSTOMER DONE

a. Review Now

Takes the user to the [document details pop-up](#). This may seem like a redundancy, but it is a step necessary to lock the document.

b. Upload Another Document for this Customer

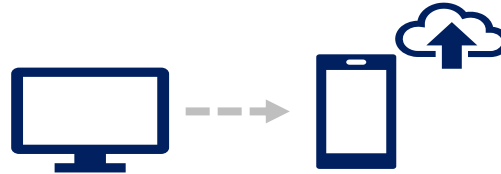
Where the user needs to upload another document, they can click this button to start the Upload process again for this specific customer.

c. Done


The user is done uploading.

How to Upload From Another Device

Users should select this option if the device they are on does not have a camera or the image is not stored on the device AND they have a secondary device, like a tablet or phone, where they can use the camera or the image of the document is already stored. When this option is selected, more options appear for the customer to walk through the process to upload the image.



1. Select Staff Upload – Upload image from another device

 I-Trac Secure Document Upload

Customer Name
Ada.test Test

I-Trac Customer ID
1529401

Select how you are uploading the document.

Staff Upload - Upload image from this device
 Staff Upload - Upload image from another device
 Customer Upload - Send request to customer for upload

2. Select Document Type

Specify which document to upload and click next. Staff may only upload one document type at a time.

Select document type.

Hospital Record of Birth

3. Select Secure Link Option

Choose how you want to send the secure link to your device. When you retrieve the link or follow the QR code from the secondary device, it will direct you enter the document's details or document upload.

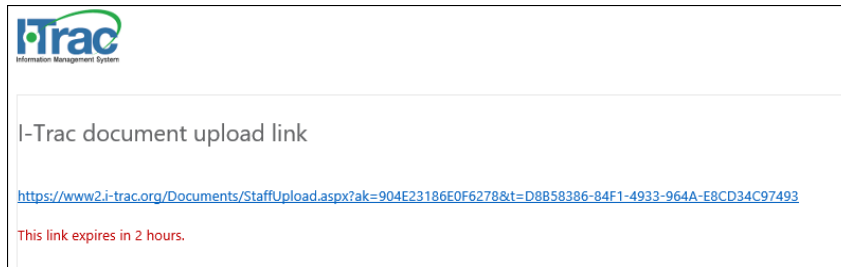
Select how you want to send a secure link to your device.

Email (jmedhaug@worksystems.org)
 Text Message
 QR Code

a. Email

Emails will only be sent to staff's employer-based email account on record in the I-Trac system.

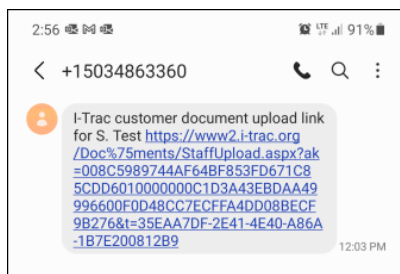
- 1) When email is chosen, a link will be sent to the staff's email.
- 2) Staff will have two hours to retrieve the email, click the link and finish the upload.
- 3) When the link is clicked from the email, staff will be directed to an I-Trac secure document upload page to complete their upload.



b. Text Message

This option should be chosen where the staff is going to use their own secondary device to upload the document. **This should not be used to send the link to another third-party or customer.**

- 1) When Text Message is selected, staff must also provide their cell phone number. The link will be text messaged to the phone number provided.
- 2) Staff will have two hours to retrieve follow the link and finish the upload.
- 3) When the link is clicked from the text message, staff will be directed to an I-Trac secure document upload web page to complete their upload.



c. QR Code

This option is available for staff and is **unique** to this customer/document request instance. It is not appropriate to use this option so the customer can access the staff uploading tool.

- 1) When QR Code is selected, the system will generate and display a QR Code.
- 2) Staff use their device camera or other QR reading app to scan the QR Code.
- 3) The QR Code will expire in two hours.
- 4) When scanned, staff will be directed to the I-Trac secure document upload web page to complete their upload.



4. Enter Document Details

Depending on the document type, the system will require certain [data fields](#) be collected about the document.

5. Select Document Source (File or Camera)

There are two ways a staff can upload. Staff choose to select a file from this device or take a photo using the camera. Click Next.

a. Select image(s) stored on this device

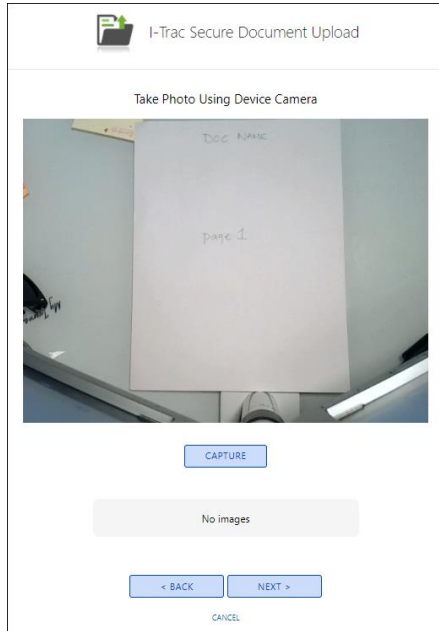
Like standard upload tools, click choose file, browse system folders to select the correct document and select it. File type must be **JPEG** or **PNG** image. Users may choose up to 10 images per document type. Click next when all images are selected.

b. Take a photo using the camera on this device

The system will ask to use the camera if it hasn't already been authorized. When the camera is enabled, present the document in front of the camera, and use the viewer to center and wait for focus.

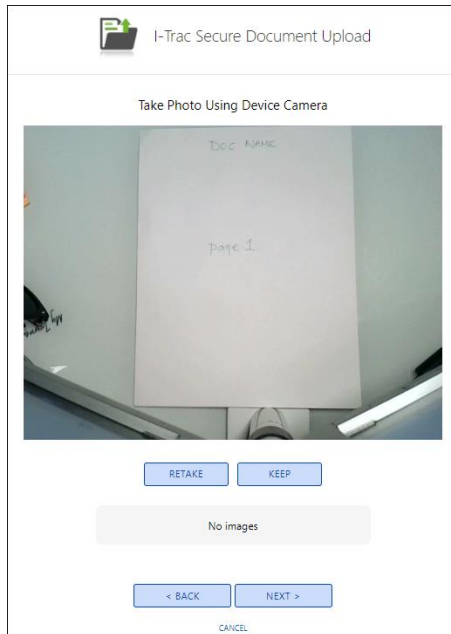
1) Capture Button

Staff uses the capture button to capture the image.



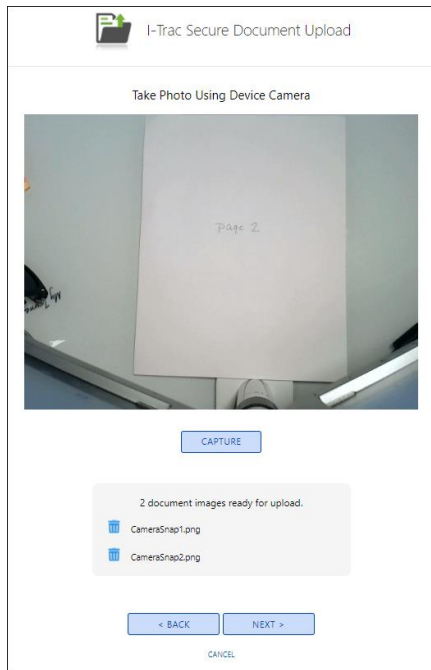
2) Retake & Keep Buttons

After an image is captured, users can retake the image or keep the image. When kept, the image will be listed in the **Selected Files** section.



3) Selected Files & Trash Icon

Once images are kept, they will appear in the selected files section as files added. Next to each image, there is a Trash Icon to delete the image from the list of added photos.

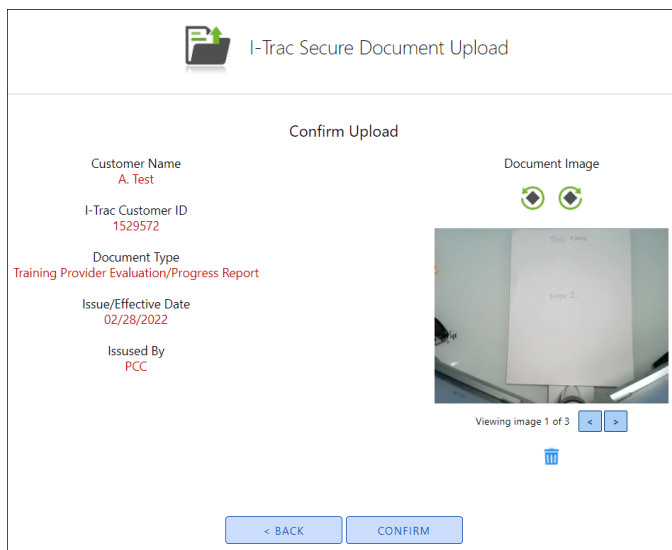


4) Next

Click when finished taking all pictures.

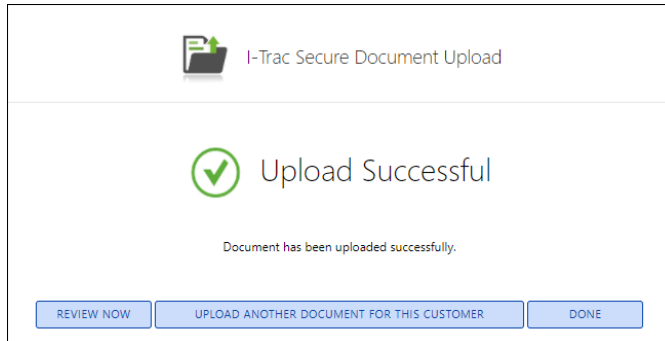
6. Confirm Upload

Once an image or file is chosen for upload and can be previewed before uploaded. Here, the user completes an additional check to confirm the information that will be uploaded to the database. Click confirm.



7. Upload Successful & Next Steps

When the upload is confirmed and complete, the system will generate a success message. The system will present the user with three buttons to choose from.



a. Review Now

Takes the user to the [document details pop-up](#) for [review](#). This may seem like a redundancy, but it is a step necessary to lock the document.

b. Upload Another Document for this Customer

Where the user needs to upload another document, they can click this button to start the Upload process again for this specific customer.

c. Done

The user is done uploading.

After Staff Upload

Generally, the staff that uploads the document will [review](#) their documents and then [attach an enrollment episode to the document](#) in short order. Where staff do not review immediately, they will receive [notifications & prompts to complete the review](#).

Customer Upload

Users with [permissions](#), can generate and send an email request to the customer for uploads. The email sends a secure link that the customer uses to access the secure upload tool. This option is great because so many customers have smart phones and tablets and can upload documents from home rather than trying to get the document to staff for upload.



Coordinate With Customer Beforehand

This option requires staff to have a prior discussion with the customer to:

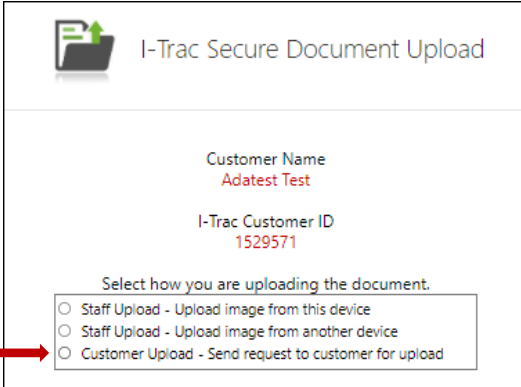
1. Confirm the customer has a device with a camera or has the documents already saved on a device.
2. Specify which policy driven documents the customer has and can upload.

3. Validate the email address where the request will go.
4. Inform the customer watches for an email from noreply@secureupload.org
5. Confirm the customer should upload the documents within 24 hours of the request or the link that is generated for upload will expire.

How to Send Request for Customer Upload

This option includes some basic instructions and is asking staff to complete the following elements.

1. Select Customer Upload – Send request to customer for upload



I-Trac Secure Document Upload

Customer Name
Adatest Test

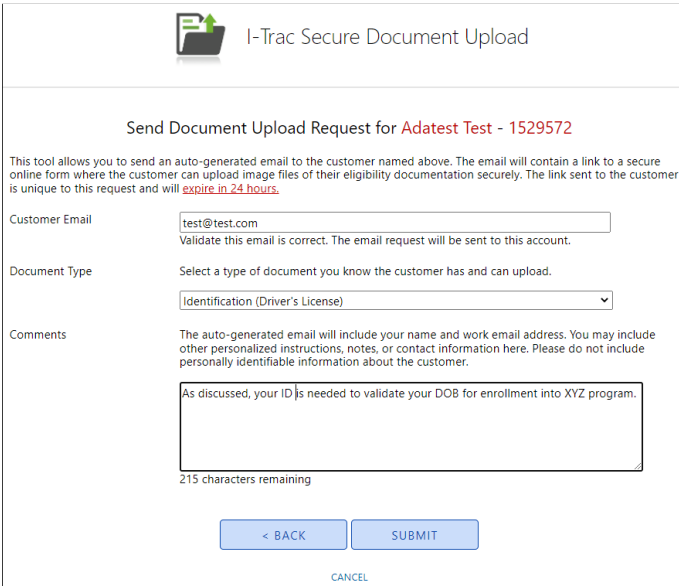
I-Trac Customer ID
1529571

Select how you are uploading the document.

- Staff Upload - Upload image from this device
- Staff Upload - Upload image from another device
- Customer Upload - Send request to customer for upload

A red arrow points to the 'Customer Upload' radio button.

2. Validate Customer & Document Request Details



I-Trac Secure Document Upload

Send Document Upload Request for Adatest Test - 1529572

This tool allows you to send an auto-generated email to the customer named above. The email will contain a link to a secure online form where the customer can upload image files of their eligibility documentation securely. The link sent to the customer is unique to this request and will **expire in 24 hours**.

Customer Email:
Validate this email is correct. The email request will be sent to this account.

Document Type: Select a type of document you know the customer has and can upload.

Comments: The auto-generated email will include your name and work email address. You may include other personalized instructions, notes, or contact information here. Please do not include personally identifiable information about the customer.

215 characters remaining

< BACK SUBMIT


CANCEL

a. Customer's Email

I-Trac will default to show the most recent email address from any enrollment episodes. Staff can change or add an email address for the customer here. Any new email saved will be stored.

b. Document Type

Staff may request only one document at a time. If staff requests the same document twice within the 24-hour period, the first request will expire when a new request for the same document type is sent. Review [Expired Links and Errors](#) for more information.

 **SYSTEM UPDATE**

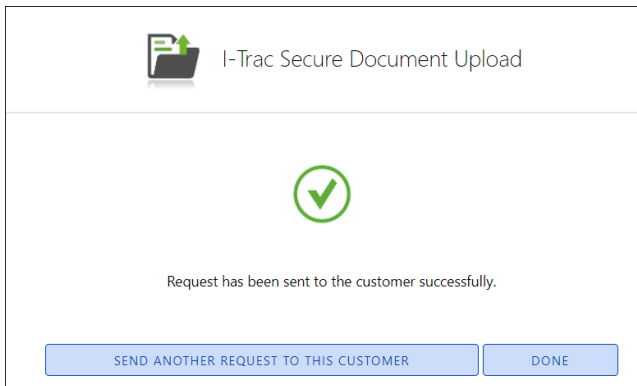
With this system enhancement, staff may only request **ONE** document at a time. This is because the system is now allowing documents with multiple pages be uploaded and multiple images in one upload can bog down the system considerably.

c. Comments

This is an opportunity for staff to customize a message for the customer. Click Submit.

3. Confirmation

When the request is complete, the system will generate a success message. The system will present the user with two buttons to choose from.



b. Send Another Request for this Customer

Where the user needs to send another document upload request, they can click this button to start the Upload process again for this specific customer.

c. Done

The user is done uploading.

Customer is Sent Email With Link To Upload

After the request is completed by staff, the system will generate an email that contains a unique link to the [secure upload form](#).

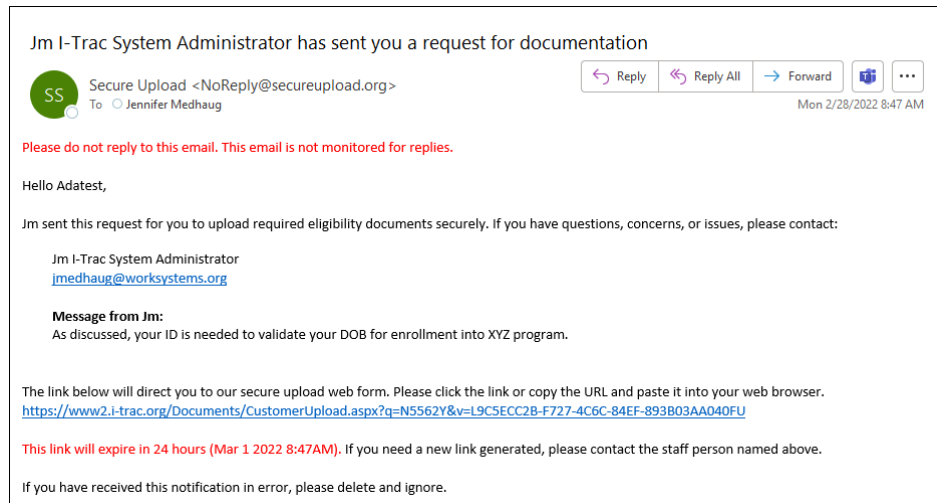


Figure 12 – Example of an email sent to customer with a link to upload.

From Address: noreply@secureupload.org

Customers should watch for email from this email address. Check spam/junk folders and if they have trouble, set this email up in contacts so email systems do not automatically discard or block.

NOTE: If customer still cannot find the request, send a new request, and double check the customer’s email is correct.

Branding

The email is free of any branding because this tool can be used by any grant/fund using I-Trac. Because branding is removed, it is important the customer knows this is a legitimate email ahead of time.

Message From [Staff First Name]

The [comments](#) the user added when requesting customer upload will appear in the body of the email.

Expired Links and Errors

There are three reasons a link will expire and the customer will receive a webpage error. Staff can send a new request, but should again coordinate with the customer.

1. If the customer tries to follow the link after the **24-hour expiration** date/time rule.
2. If the customer has already submitted documents related to this request, the links will error.
3. If a new request is sent to the customer, older document request links will error.

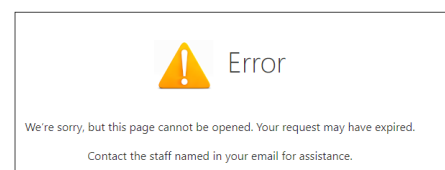


Figure 13 - Error message a customer may see.

Secure Upload Form

Upload image from device or authorize application to use the camera to capture images of the document. When choosing a file, they must choose an [allowable file type](#) from their device.

Figure 14 - Customer facing secure upload form.

Multiple Page Documents

Where a document has multiple pages, they may select up to 10 images.

Allowable File Types

The system will allow **jpeg** or **png** image files to be chosen in this upload tool. The customer should choose a file for each document before clicking Upload button.

Upload Successful

The customer will see a message to confirm their upload is successful.

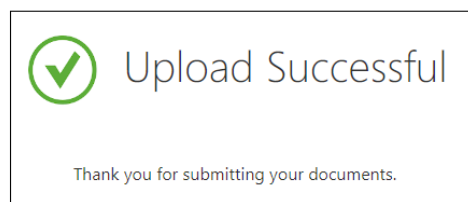


Figure 15 - Customer successful upload message.

Help

There is a help page with helpful hints for a successful upload. There is not a generic technical support contact. Instead, the staff person that made the request is the contact for assistance. If the staff person

receives a call for help and cannot help, then the staff person should contact support@i-trac.org for assistance.

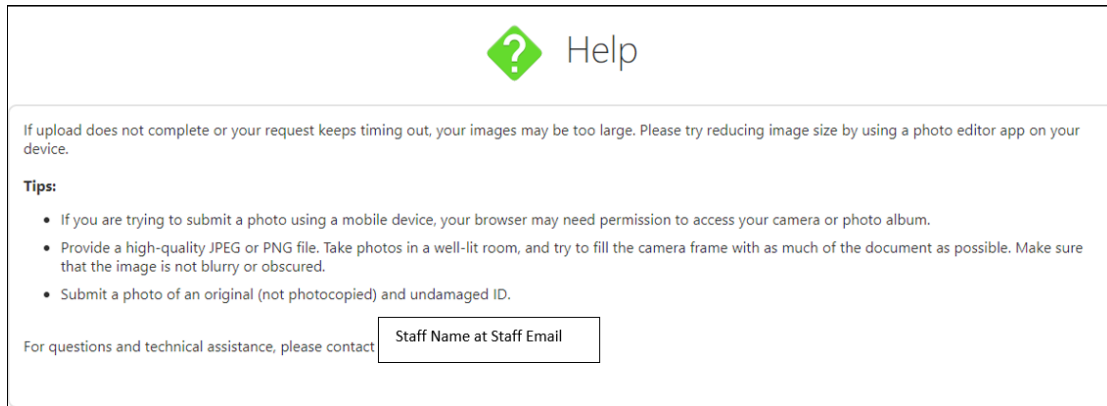


Figure 16 – Help page in customer secure upload.

After Request for Customer Upload

Because it may take the customer up to 24 hours to upload their documents, there is time between the request for the upload and the [review](#) and staff cannot [attach an enrollment episode to the document](#) until the review is complete.

The staff that does make the request, will receive an [email notification](#) when the customer completes the upload. Where staff do not review immediately, they will have a [login pop-up](#) when reviews are needed.



Notifications & Prompts to Review

The user who completes [staff upload](#) or requests a [customer upload](#) will be prompted to [review](#) following their own upload. They will continue to be notified there are reviews needed, until they the documents are reviewed.

Review Now Button

Following staff upload, the user receives the *Upload Successful* message. At this time, the user is prompted to review the documents now. This is optional at the time of upload because staff may have more documents to upload before they choose to review.

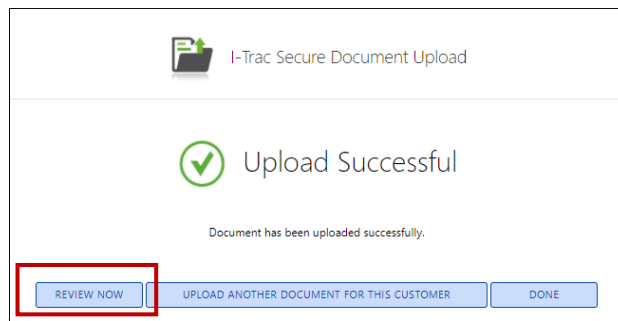


Figure 17 – Button to Review Now.

Pop-up

This pop-up appears at the foot of the user’s I-Trac page. The Customer Documentation link will direct the staff to the [Search Tab](#) of customer documentation and will automatically return [search results](#) for all their individual documents needing review. Staff can close this prompt to ignore it for their current I-Trac session; however, the prompt will return the next time they login or if they refresh their browser, and if there are documents that are not reviewed.

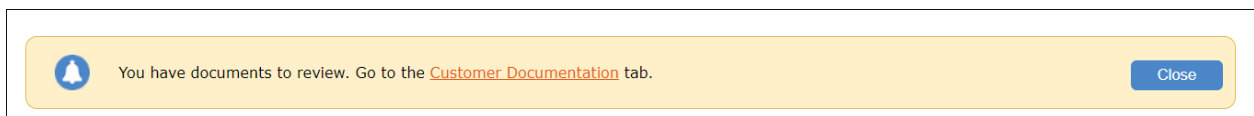


Figure 18 – Pop-up that appears at foot of I-Trac when user is logged in.

Email Notification

Where staff request the [customer uploads](#) their own documents, the staff that made the request will receive an email notification that the documents ready for review.

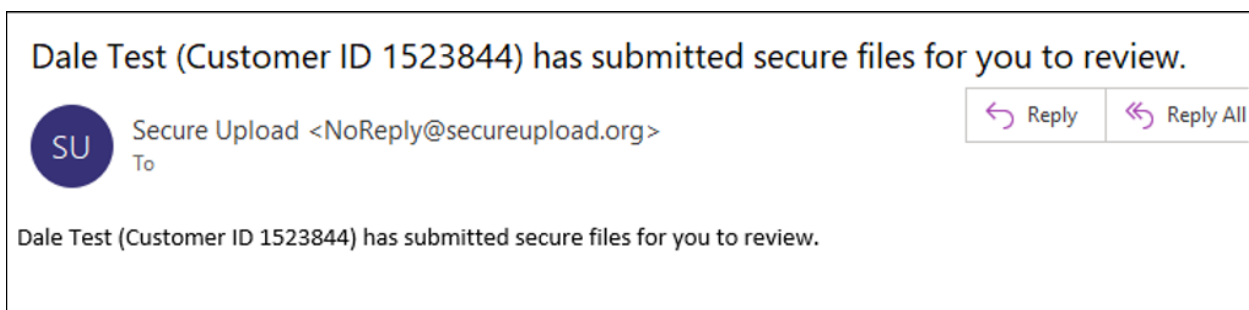


Figure 19 - Example of email for staff when customer has completed upload.



Document Details Pop-up

Staff with appropriate permissions levels can open the document details pop-up by clicking the [review/select button](#) found in [search results](#). See the [permissions chart](#) for the clear visual that explains what users can view, edit, and delete and when they can do it (before review, after review or after attaching enrollments).

Figure 20 - Example of Document Details Pop-up where document is not reviewed.

Multi-Page Arrows

Where a document type has multiple pages that were uploaded, staff can scroll through the pages using the left/right arrows.

Complete Review Button

If the document has not yet been reviewed, the fields will be editable. Staff clicks the Complete Review button below the image.

Required Data Fields

Data fields that must be complete for the Document Type, will be yellow. Where a field is present in the image, but is not a required field, it is best to be sure this data is entered in the field regardless. The reason this can happen is sometimes document details vary by the source.

Hidden Information

After review is complete, only [admin](#) level users and [monitors](#) can view the Document Image or full Document Number.

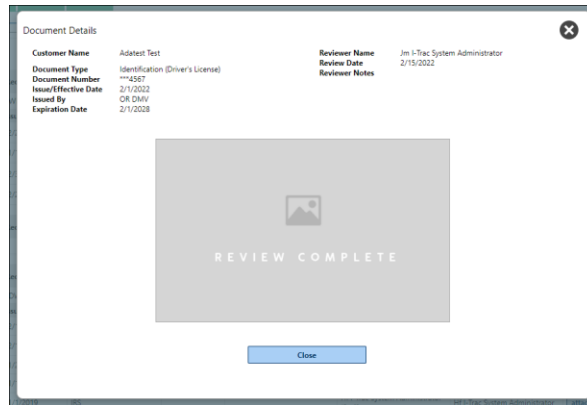


Figure 21 - Image/Document Number are hidden after review.



Review Purpose & Functionality

The review is an important step in the documentation upload procedures is completed for a [variety of purposes](#).

Reviewers

Any user with [full data entry](#) or [admin](#) level permissions can complete a review. Generally, the user who completes a [staff upload](#) or requests a [customer upload](#) is going to complete the review. I-Trac generates [notifications and prompts to review](#) for that user.

Purpose of the Review

There are multiple reasons for the review.

Validate the Uploaded Image is Not Corrupt

During the upload process, staff preview the document to be uploaded, but the only way to confirm the actual image was saved to the database without any issues is to Review the document.

Accuracy

The reviewer is confirming the document image and data elements captured from the document image are accurate. They are confirming the document is attached to the correct customer. When other users are [attaching enrollments to this document](#), they are relying on the original review.

Reviewer Attestation

The reviewer of the document is stored. If there are issues with the document that are found during monitoring, questions will be directed to the reviewer and their Grant Administrator. Staff must take this step very seriously because the collective of all users are relying on the review to be accurate.

Hide Elements

Because the reviewer is confirming the data elements captured are accurate, the [Document Image](#) and full [Document Number](#) are hidden.

Required to Attach Enrollment to a Document

Only reviewed documents can have a [customer enrollment episodes attached](#) to it.

Rules Management

Rules related to viewing documents, editing documents, and deleting documents are embedded into the system to limit errors, secure documents, and ensure customer privacy wherever possible. Rules are [permissions-based](#) and change throughout the documentation process. The best explanation of permissions-based functionality and rules are outlined in the [permissions chart](#).

How to Review

The steps to review are straight forward. Remember, not only the staff who requests a customer upload or uploads the document can review the document.

1. Find Customer's Document

Either [search](#) for the customer's uploaded document or follow the [notifications & prompts to review](#) when presented.

2. Click Review Button

The review button will open the [Document Details Pop-up](#). If a document has already been reviewed, the button will be a select button and the document cannot be reviewed again.

	Customer Name	Customer ID	Birth MM/DD
upload hide	Adatest Test	1529572	06/01
	Document Type		
select	Identification (Driver's License)		
select	Training Provider Evaluation/Progress Report		
select	CASAS Goals		
select	Follow-up Survey (Signed)		
select	Quarterly Tax Payment Forms		
select	Birth Certificate		
review delete	Identification (Government Issued Photo ID)		
review delete	Self-Photo		

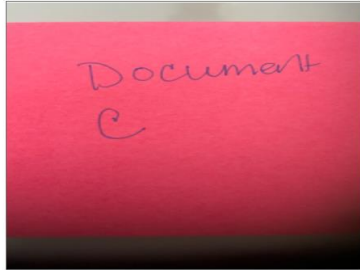
3. Validate the Document

Validate the image is not corrupt and validate the document's data fields against the image.

- If the image is not legible or is corrupt, the document should be deleted and uploaded again. Do not complete review.
- If the image is good and the document fields are complete, proceed with review.

Document Details ✕

Customer Name	Ada.test Test	Reviewer Name	Jm I-Trac System Administrator
Document Type	Identification (Driver's License)	Review Date	2/14/2022
Document Number	1234567	Reviewer Notes	<input type="text"/>
Issue/Effective Date	2/2/2018		
Issued By	Oregon DMV		
Expiration Date	2/2/2026		



+
-

Complete Review
Cancel

4. Complete Review

Click the [complete review button](#) to finalize the review for the document.

After Review

Following the review, the document image is hidden, the document number is partially hidden. Only users with [admin](#) level permissions can edit the document and only if there are no [enrollments attached](#).

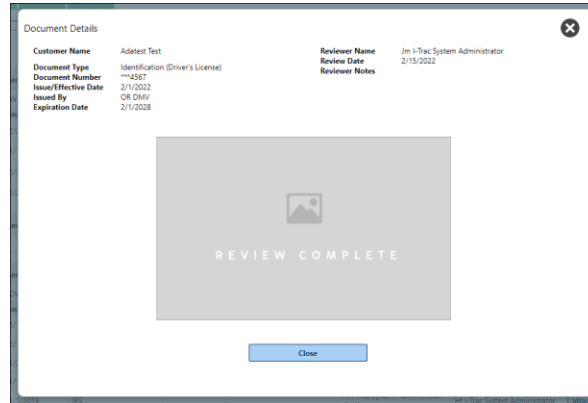


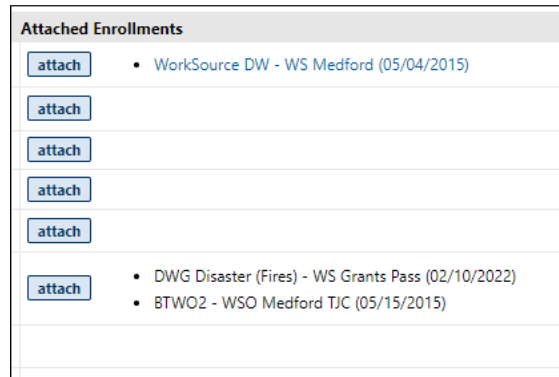
Figure 22 - Image/Document Number are hidden after review.

Attach Enrollment to a Document

Once a document is uploaded for a customer, it is unique to the customer, but attaching a customer’s [current enrollment episode](#) to a document is going to help all users know more specifically **how** the document was needed and which enrollment(s) use it for their backup documentation.

Attached Enrollments Field

This field has multiple functions and rules. Overall, it allows all users to view which enrollments are using the customer’s documents. It also allows users with permissions to open the Attached Enrollments Pop-up to add new enrollments or view the notes.



Attached Enrollments

- [attach](#) • WorkSource DW - WS Medford (05/04/2015)
- [attach](#)
- [attach](#)
- [attach](#)
- [attach](#)
- [attach](#) • DWG Disaster (Fires) - WS Grants Pass (02/10/2022)
- [attach](#) • BTWO2 - WSO Medford TJC (05/15/2015)

Figure 23 - Example of a customer with enrollments attached to documents.

Attach Button Visibility

Before a document can have a [current enrollment episode](#) attached, the document must be [reviewed](#). The [attach button](#) will not be visible until the review is complete.

Customer Name	Customer ID	Birth MM/DD	Recent Fund Activity						Attached Enrollments	
upload hide Adatest Test	1540384	02/01	WorkSource Adult (WS Medford)							
review delete			Document Type	Issue Date	Issued By	Expiration Date	Staff Request	Uploaded By	Reviewed By	
			Identification (Driver's License)	2/1/2022	OR DMV	2/1/2028		Cindy Manning (Staff)		

Figure 24 - Example where review is needed and attached button is missing.

Customer Name	Customer ID	Birth MM/DD	Recent Fund Activity						Attached Enrollments	
upload hide Adatest Test	1529572	06/01	DWG Disaster (Fires), WorkSource DW (WS Medford), WorkSource DW (WSPM N/NE), WorkSource DW (EDIT to your provider)							
select			Document Type	Issue Date	Issued By	Expiration Date	Staff Request	Uploaded By	Reviewed By	attach
			Identification (Driver's License)	2/1/2022	OR DMV	2/1/2028	R02Reboot Train	Adatest Test (Customer)	Jim I-Trac System Administrator	

Figure 25 - Example where review is complete, so attach button is visible.

Permissions

Like most of the customer documentation functionality, it is permissions-based. Like uploading and reviewing, generally staff responsible for case management/grant permissions are going to be working with customers to collect documentation which supports one or more enrollment episodes and admins. Therefore, staff with [full data entry](#) or [admin](#) level permissions are those permitted to [attach an enrollment to a document](#), [view notes after attachment](#), [edit notes after attachment](#) or [remove an enrollment after attachment](#).

Attached Enrollments Listed

All the enrollments that have been attached to this document have been listed.

Enrollment Naming

The enrollment naming aligns with the Service Provider naming found on the Provider's Tab of the customer's record and includes the Application Date to help specify the exact enrollment:

- **Service Provider (Application Date)**

Hyperlinks to Open Enrollment Episodes

Where the user has any level of [permissions](#) to the customer's enrollment episode, the enrollment name will be a hyperlink. Where the text is black, the user does not have any level of [permissions](#) to open the enrollment.

Attached Enrollments Pop-up

This pop-up opens when the [attach button](#) is clicked. [Monitors](#) and users with [full data entry](#) and [admin](#) level permissions will be able to click the attach button. In this pop-up, the user is choosing the enrollments they wish to attach to the document.

Adding an Enrollment

The user must have [full data entry](#) or [admin](#) level permissions to each enrollment they want to select. The enrollment also needs to be a [current enrollment](#). Where these conditions do not apply, the box is grayed out and cannot be selected.

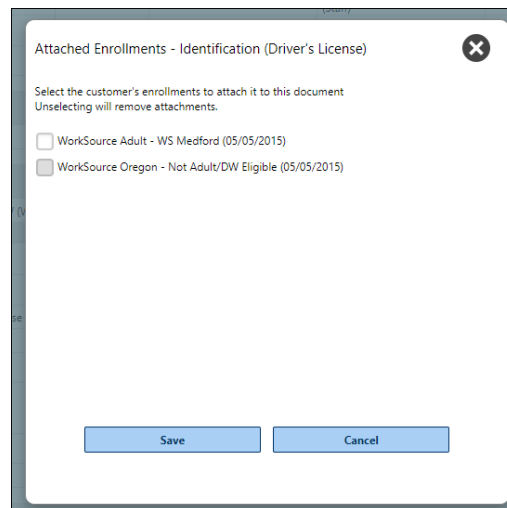


Figure 26 - Attached Enrollments Pop-up where users select the enrollments they need to attach to the document.

Notes

This notes field is where staff can be very specific about the document and how it is being used for the customer's enrollment. For example, an identification may be used to document DOB for eligibility, or a GED might be used to document credential attainment performance. Whatever the reason the document

is needed, this field can help to clarify its use. Clarity is helpful to those conducting grant oversight, file reviews and grant monitoring.

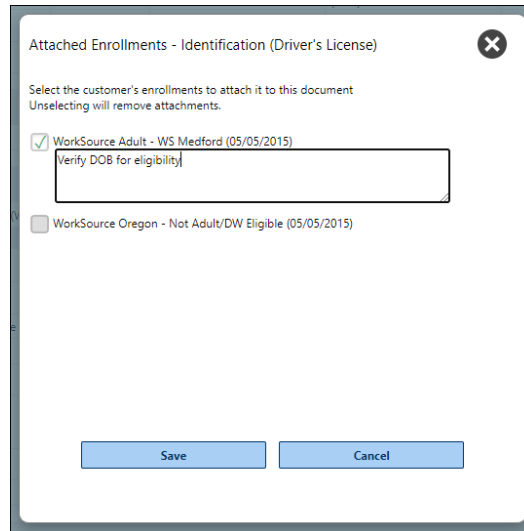


Figure 27 - Example of notes that explain how the document is used in the enrollment.

Adding Notes

When an enrollment is selected, users with [full data entry](#) or [admin](#) level permissions can add a note to help specify how the document is used.

Viewing Notes

[Monitors](#) and [full data entry](#) level users can view the notes after they are saved.

Editing Notes

Only users with [admin](#) level permissions can edit or delete this information later.

How to Attach an Enrollment to a Document

Only users with [full data entry](#) or [admin](#) level permissions to a [current enrollment episode](#) can attach an enrollment to a document.

1. Click the [attach button](#) for the specific document
2. Check the box for the [selected enrollment](#).
3. [Add notes](#) related to the use of this document for this enrollment.
4. Click Save.

How to View a Note After Attachment

Only [monitors](#) and users with [full data entry](#) or [admin](#) level permissions at least one [current enrollment episode](#) can open the Attached Enrollments Pop-up to view the notes.

- Click the [attach button](#) for the specific document to view all enrollments and their notes.

How to Edit a Note After Attachment

Only users with [admin](#) level permissions to the specific [enrollment episode](#) can edit the note.

1. Click the [attach button](#) for the specific document
2. Edit the note related to the use of this document for this enrollment.
3. Click Save.

How to Remove an Enrollment After Attachment

This step is required before a document can be deleted. Only users with [admin](#) level permissions to the specific enrollment episode can unselect the enrollment to remove the attachment.

1. Click the [attach button](#) for the specific document
2. [Uncheck the box for the enrollment to unattach.](#)
3. Click Save.

Support

For all staff questions or to delete/edit data in these tools where your permissions do not allow you to do it, please contact your grant's administrator. The Grant Administrator needs to review the request and determine whether they will change it. Their permission allows them to complete most data changes in I-Trac and where they cannot, they will send the request to I-Trac Support.