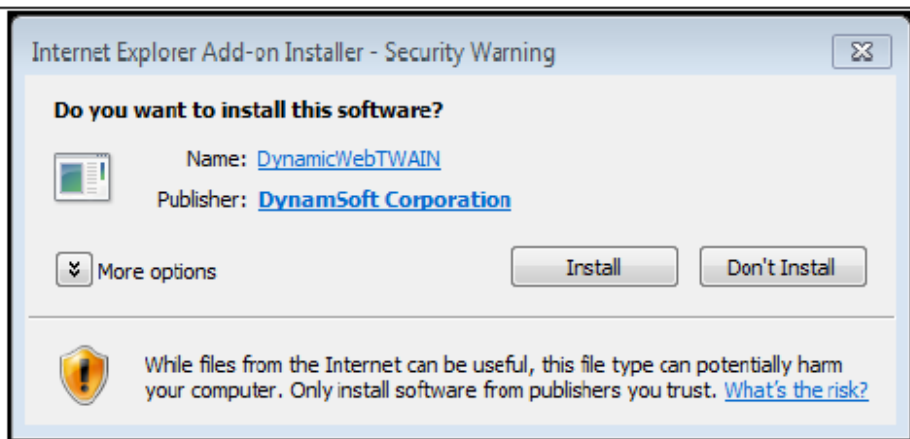


Attachment B: CalJOBS Document Management and Scanning Screenshots (Process of Scanning Documents into CalJOBS)

The Document Imaging Module enables staff to scan and upload documents into CalJOBS. Before following the steps below, ensure that your scanner is connected correctly and the Auto Start switch in the back of the scanner is switched to OFF.

A local scanner must be directly attached to a computer in order to scan into CalJOBS. You will be prompted to download the latest version of the Dynamic Web TWAIN plug-in, which is required for scanning documents. Once installation is complete, staff will need to restart their browser. It is best to use a PC with a direct connection to the desired scanner.



The scan feature requires TWAIN compliant equipment if using a network printer.

There are three options in which staff can scan and upload documents directly to CalJOBS.

Option 1: Scanning into a field in WIOA application

1. To begin, staff can scan documents into a field in the *WIOA Application* by clicking on the “Scan” link. Once selected, CalJOBS will display the Document Association screen below.

Verify the correct document and click on the Scan document button.

Title I - Workforce Development (WIOA)

Contact Demographic

- ✓ Intro
- ✓ Veteran
- ✓ Public Assistance
- ✓ Miscellaneous

- ✓ Contact
- ✓ Employment
- ✓ Barriers
- ✓ Eligibility Summary

- ✓ Demographic
- ✓ Education
- ✓ Household And Income

▲ Hide All Steps

* **Date of Birth:**

08/29/1980

[Edit Date Of Birth](#)

* **Verify:**

[[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

✓ Documentation in Case File

Document Association Page

Document Association

Program: Workforce Innovation and Opportunity Act (WIOA) Program
Application: WIOA Application #16069259; Application Date 9/16/2016
Verification Item: WIOA - Date of Birth Verification
Verification Type: Documentation in Case File

Document Information

* Document Tags:
Keywords that will be indexed with this attachment.

User Accessible: Yes No

Scan Options

Select Source: [Dropdown]
Pixel Type: BW Gray RGB
Resolution: [100]

Settings

Show Source User Interface Discard Blank Page
 Use Auto Document Feed Duplex
 Insert new scanned image before current image

Scan Document

Enter the document tags, press enter after inserting each tag. These tags will help staff search for documents.

Specify whether you want to allow the user (individual) access this document.

Select the source scanner.

Select **RGB** under Pixel Type and 300 under **Resolution**.

Select any additional settings for the scan job.

Check **Duplex** to scan both sides of a document.

Check **Show Source User Interface** to see specific scanning options after clicking **Scan Document**.

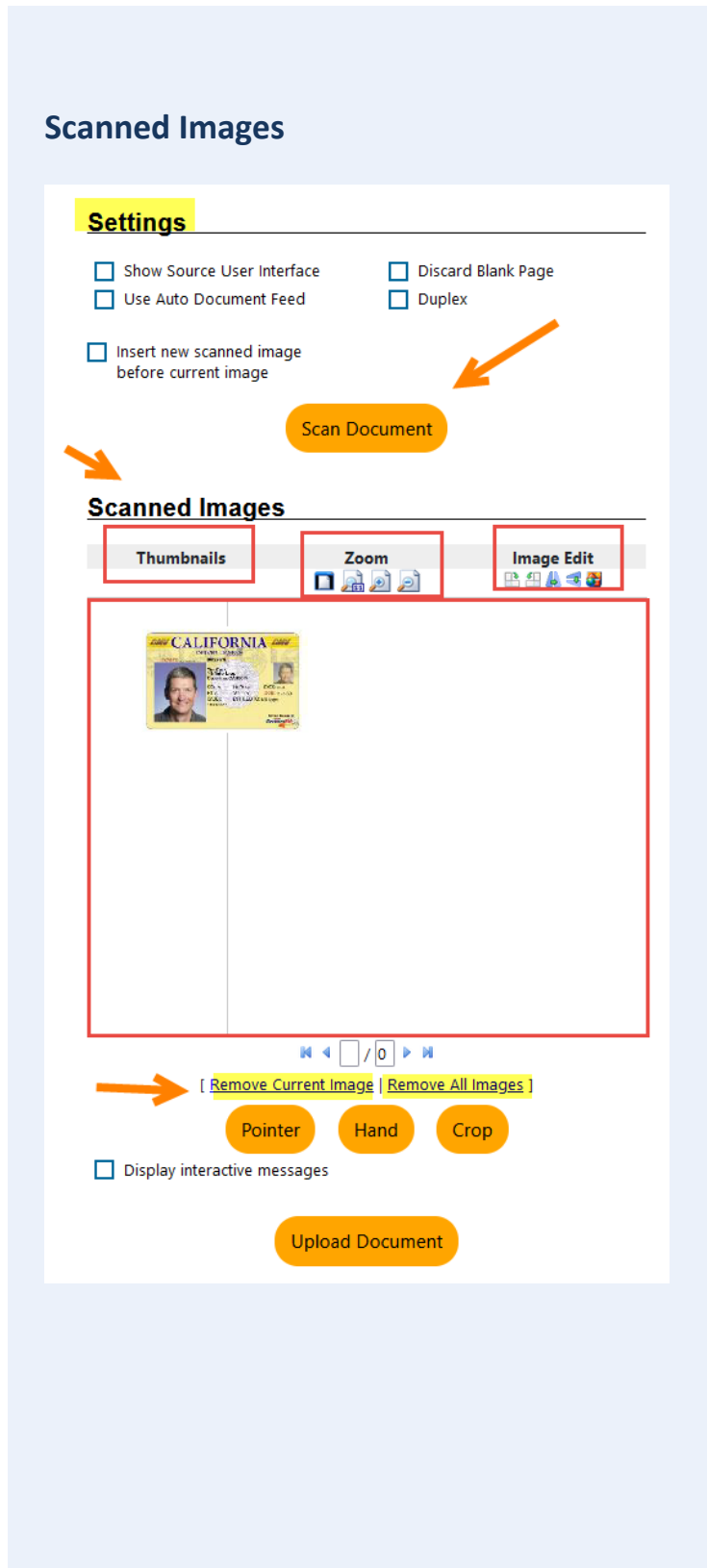
2. Scanned Images - Once the file transfer for the image scan is finished, the scanned image will display in the thumbnail and image areas. From the [Scanned Images section](#), you can perform the following actions before uploading the image:

- Use the image tools, as desired, to crop or edit the scanned image prior to uploading it.

- Enter a *Document Name*. If the preview meets your approval, enter a title for the document in the Document Name field and click the Upload Document button to upload the verification document from your computer and save it on the system.

Note: The uploaded document's filename cannot be changed after the initial save/upload.

- Recommended naming convention would include the last name of the individual, underscore, and the document type (e.g., *Smith_Social Security Card*).



3. **Settings** - When you have finished selecting your settings, click the *Scan Document* button to scan your verification document and view a preview of the scanned image on the screen. Use the **Image Control Links** to change the alignment and orientation of your scanned image.
4. After you are satisfied with your scan job, click on the *Upload Document* button. Your scanned document will now be uploaded to CalJOBS.
5. When the upload is complete, the Scanned Images section becomes empty, and the image tools and upload button are made inactive, because the document was loaded to the Documents tab.
6. **Verify Document** - As a final step, make sure to select the type of documentation being verified by clicking on the *Verify* link on the application field.

Title I - Workforce Development (WIOA)

Contact Demographic

[Intro](#) [Contact](#) [Demographic](#)
[Veteran](#) [Employment](#) [Education](#)
[Public Assistance](#) [Barriers](#) [Household And Income](#)
[Miscellaneous](#) [Eligibility Summary](#)

▲ Hide All Steps

WIOA

Demographic Information

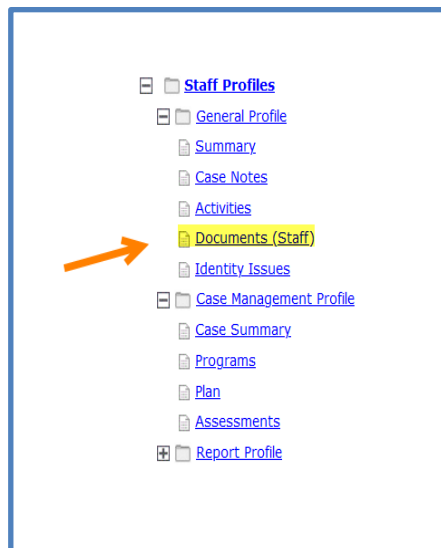
* Date of Birth: 08/29/1980 [Edit Date Of Birth](#)

• Verify: [Verify](#) [Scan](#) [Upload](#) [Link](#)
 Documentation in Case File

Option 2: Scanning into the Documents (Staff) section

After selecting an Individual profile to manage, staff can upload, scan or link documents to an Individuals case file by using the Document Management feature within CalJOBS.

1. Login in to CalJOBS and locate a participant's profile. After selecting an Individual profile to manage, go to the *Staff Profiles folder* > *General Profile* > *Documents* (Staff) link, locate the Documents (Staff) tab Select Add a Document button.



2. To scan a new document, click on the Scan Document button at the bottom of the page.

The screenshot shows a navigation bar with four tabs: 'Summary', 'Case Notes', 'Activities', and 'Documents (Staff)'. Below the navigation bar is a section titled 'Documents Available'. Under this section, there is a message: 'Listed below are the documents available on the selected Individual. Click the View link below to view that particular item.' Below this message is a link: 'Show Filter Options (Showing all records)'. Further down, there is a 'Results View' section with links for 'Summary' and 'Detailed'. Below the 'Results View' section is a message: 'No document was found'. Below this message are four buttons: 'Add a Document', 'Scan a Document', 'Link a Document', and 'Complete Online Form'. An orange arrow points to the 'Scan a Document' button. At the bottom of the page is a button labeled 'Return to Directory of Services'.

*Documents may also be scanned, uploaded, linked, and viewed during the registration verification process or when adding case notes to a record.

3. Complete the *Document Association* section:
- Select the Program to associate with the document
 - Select the applicable Application number available
 - Select the Verification Item

Note: If staff selects a Verification Item, the system will reload the page to display available Verification Type options.

Document Association

Program: Workforce Innovation and Opportunity Act (WIOA) Program

Application: WIOA Application #16069259; Application Date 9/16/2016

Verification Item: WIOA - Date of Birth Verification

Verification Type: Documentation in Case File

Document Information

* Document Tags:
Keywords that will be indexed with this attachment.

User Accessible: Yes No

Enter the document tags, press enter after inserting each tag. These tags will help staff search for documents.

Specify whether you want to allow the user (individual) access this document.

4. Complete the *Document Information* section:
- Enter Document Tags (keywords that will be associated with the attachment, i.e., Driver's License, Date of Birth, Address, Certificate, etc.)
 - Select **User Accessible** (default is No)

The image shows a software interface for scanning documents, divided into two main sections: "Scan Options" and "Settings".

- Scan Options:** Includes a "Select Source:" dropdown menu, "Pixel Type:" with radio buttons for "BW", "Gray", and "RGB", and "Resolution:" with a dropdown menu showing "100".
- Settings:** Includes checkboxes for "Show Source User Interface", "Use Auto Document Feed", "Insert new scanned image before current image", "Discard Blank Page", and "Duplex".
- Buttons:** A prominent orange "Scan Document" button is located at the bottom of the settings section.

Red arrows point from instructional text boxes to specific UI elements:

- Box 1: "Select the source scanner." points to the "Select Source:" dropdown.
- Box 2: "Select **RGB** under Pixel Type and 300 under **Resolution**." points to the "Pixel Type:" radio buttons and the "Resolution:" dropdown.
- Box 3: "Select any additional settings for the scan job. Check **Duplex** to scan both sides of a document. Check **Show Source User Interface** to see specific scanning options after clicking **Scan Document**." points to the "Settings" section.

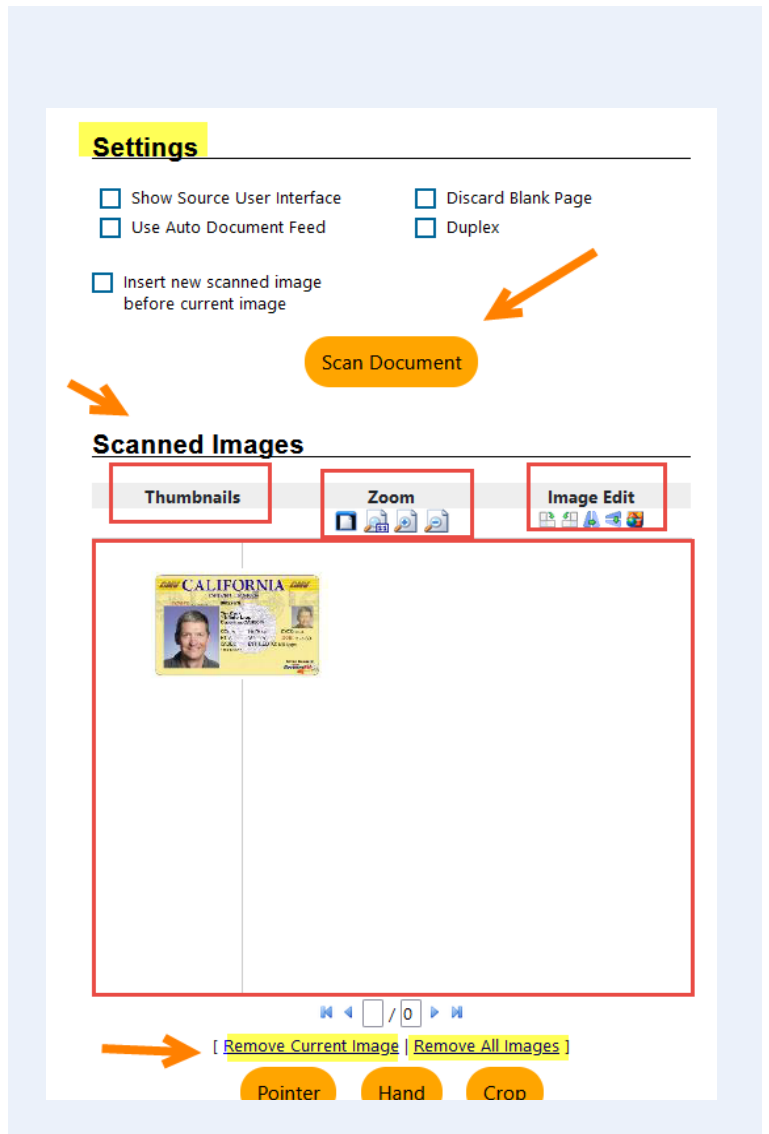
Note: For consistency, consider the document filename and the document tag prior to saving. A recommended naming convention could include the last name of the individual, underscore, and the document type.

Examples: *Smith_Drivers License.doc*

Select the Resolution for your scanned image from the drop-down list. Higher resolutions result in better-quality scanned images, but at the expense of a larger file size.

5. After you are satisfied with your scan job, click on the Upload Document button. Your scanned document will now be uploaded to CalJOBS.

6. When the upload is complete, the Scanned Images section becomes empty, and the image tools and upload button are made inactive, because the document was loaded to the Documents tab. As you upload documents, they will populate into a table.



Documents Available

Listed below are the documents available on the selected Individual. Click the *View* link below to view that particular item.

[Show Filter Options \(Showing all records\)](#)

Results View: [Summary](#) | [Detailed](#)

Click a column title to sort.

[\[Top | Filter Criteria | Bottom \]](#)

As you upload documents,
they will populate into a table



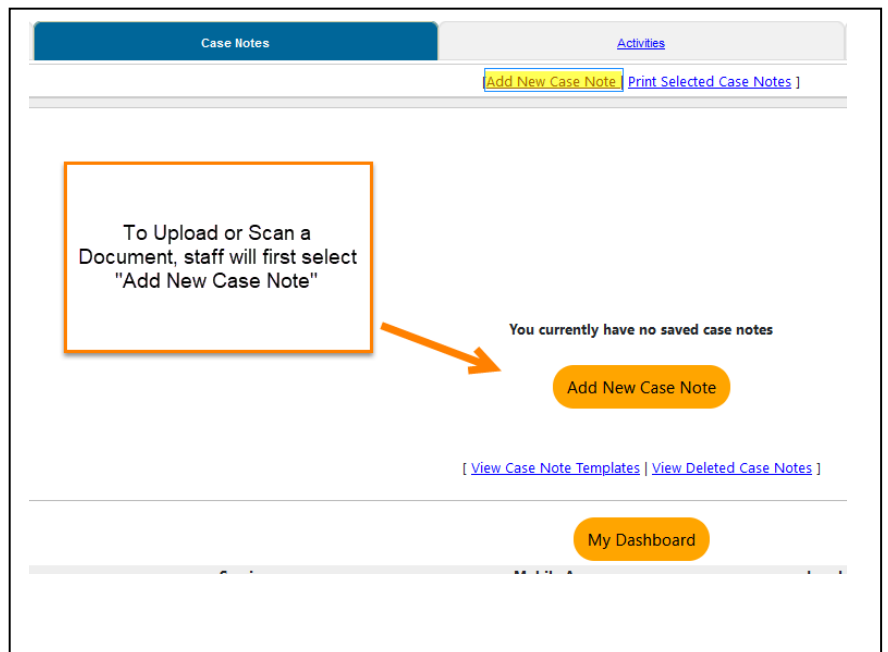
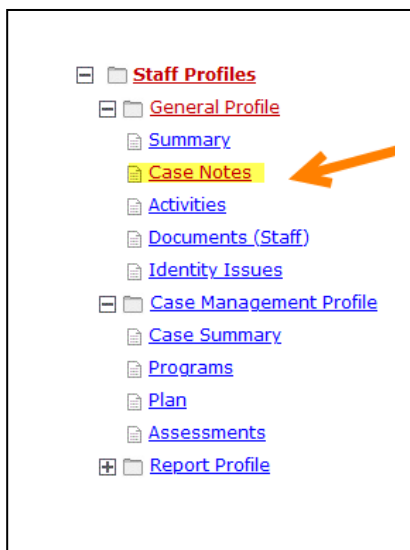
Document Name	Document Tags	Category	Modify Date	Expiration Date	
CA_Driver.jpg	Anita-Job_Drivers_License	Verification	08/10/2021 10:32	08/06/2026 12:00	

Page 1 of 1 Rows 5

Option 3: Scanning into the Case Notes section

After selecting an Individual profile to manage, staff can upload, scan or link documents to an Individuals case file by using the *Case Notes* feature within CalJOBS.

1. After selecting an Individual profile to manage, go to the *Staff Profiles folder* > *General Profile* > *Case Notes* link, selected Add New Case Note.



2. After completing a Case Note, staff will have the option to Add or Scan a document. Scroll down to the bottom of the page to see both links.

Appointment Options

[Add Appointment](#)

Case Note Template

Autofill by Template:

Case Note Summary

Username:

User ID:

Name:

Case Note Details

Please check to suppress this Case Note

* Contact Date: [Today](#)

* LWDB/Region:

* Office Location:

* Program:

Partner Program:

* Subject:

Contact Type:

* Case Note Description:

3. If “Add a Document” is selected, staff will be able to select a file.

Case Note Attachment(s)

Listed below are the documents associated with this case note. Click the View link below to view that particular item.

Results View: [Summary](#) | [Detailed](#)
Click a column title to sort.
[\[Top | Filter Criteria | Bottom \]](#)

Uploaded and scanned documents with spaces in the document name may be incompatible with some browsers. These spaces will be replaced with _ when saving the document in our system.
[\[Top | Filter Criteria | Bottom \]](#)

View Thumbnails

[Add a Document](#) | [Scan a Document](#)

Multiple documents can be uploaded simultaneously, but must be selected one-by-one.

[Supported File Format](#)

4. If “Scan Document” is selected, a popup page will become available to scan a document.

* Case Note Description:

[\[Text Templates \]](#) | [\[Clear Text \]](#)

Message Options

Create Message From Case Note on Save

Case Note Attachment(s)

Listed below are the documents associated with this case note. Click the View link below to view that particular item.

Results View: [Summary](#) | [Detailed](#)
Click a column title to sort.
[\[Top | Filter Criteria | Bottom \]](#)

Uploaded and scanned documents with spaces in the document name may be incompatible with some browsers. These spaces will be replaced with _ when saving the document in our system.
[\[Top | Filter Criteria | Bottom \]](#)

[Add a Document](#) | [Scan a Document](#)

* indicates required fields.

For help, click the information icon.

Document Name:
(Optional):
Specifying a document name for this scanned document is optional. If you do not provide a document name, the system will either use the Verification Type document selected, if available, or the current date and time as the document name.

Scan Options

Select Source:

Pixel Type:
 BW Gray RGB

Resolution:

Settings

Show Source User Interface
 Discard Blank Page
 Use Auto Document Feed
 Duplex
 Insert new scanned image before current image

javascript:void(0)

