CalJOBS Help Sheet 12

Document Imaging

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Document Imaging in CalJOBS

This help sheet describes how to use **Document Imaging** in CalJOBS. The Document Imaging Module enables staff to scan and upload documents into CalJOBS.

Before following the steps in this help sheet, **ensure that your scanner is installed correctly and the Auto Start switch in the back of the scanner is switched to OFF**.

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

Option 1: Scanning into a field in WIOA application

In certain fields in the Title I – WIOA application, you will be able to scan verifying documents directly.

1. To begin, select the type of documentation you wish to scan by clicking on the "**Verify**" link on the application field.

    * SSN Verify: [**Verify** | **Scan** | **Upload** | **Link**]
    ✔ Social Security Card

    Select the appropriate document you will be scanning.

2. Next, click on the "**Scan**" link.

    * SSN Verify: [**Verify** | **Scan** | **Upload** | **Link**]
    ✔ Documentation in Case File

3. On the pop-up page that appears, enter the correct information and click on the "**Scan Document**" button.

Document Association

Program:	Title I - Workforce Development (WIOA)
Application:	WIOA Application #2244260; Application Date 1/10/2020
Verification Item:	WIOA - SSN Verification
Verification Type:	Documentation in Case File

Confirm that the Document Association information is correct.

Document Information

Document Description: None Selected

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

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

User Accessible: O Yes ● No

Date Received:

If left blank, today's date will be used.

Scan Options

Select the source scanner.

Select Source: Canon P-208II TWAII ▾

Pixel Type: O BW O Gray
● RGB

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

Resolution: 300 ▾

Settings

☐ Show Source User Interface   ☐ Discard Blank Page
☑ Use Auto Document Feed   ☐ Duplex

☐ Insert new scanned image before current image

Select any additional settings for the scan job.

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

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

Scan Document

4. CalJOBS will then generate a preview and a thumbnail of the newly scanned document.

Use these options if you need to remove selected pages from your scanned document.
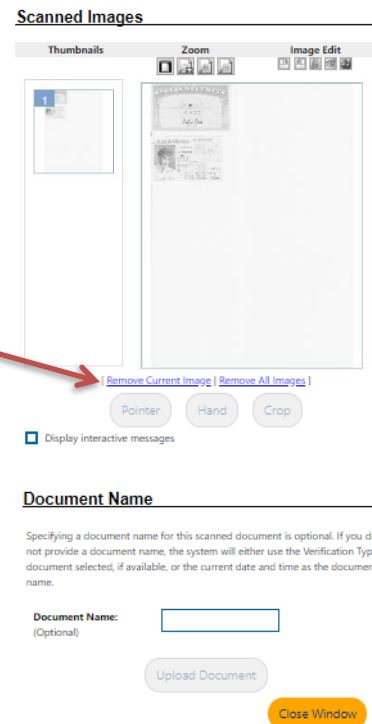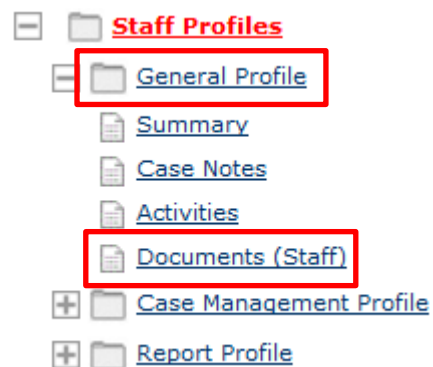
5. After you are satisfied with your scan job, click on the "**Upload Document**" button. Your scanned document will now be uploaded to CalJOBS.

Option 2: Scanning into the Documents (Staff) section

You may also scan in a document by going to the general **Documents (Staff)** section. It is recommended that all documents be attached to a specific field or case note, but if necessary, general documents can be scanned here.

1. Access the participant's case file and navigate to **Staff Profiles > General Profile > Documents (Staff)**.

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

3. Similar to scanning into a field in the Title I – WIOA application, complete the fields that are displayed. Once you make your selections, click on the "**Scan Document**" button.

4. CalJOBS will then generate a preview and a thumbnail of the newly scanned document.

5. If you are satisfied with your scan job, click on the "**Upload Document**" button. You will now find your scanned document under **Documents (Staff)** in CalJOBS.

Document Management

Searching for Documents

CalJOBS allows staff to search for uploaded documents for a particular participant case file.

1. Locate your desired participant's case file and navigate to **Staff Profiles > General Profile > Documents (Staff)**.

2. Previously scanned or uploaded documents under any field or section in a participant's case file (Title I – WIOA application, case notes, etc.) will display in a list in this folder.

Summary	Case Notes	Activities	Documents (Staff)

Documents Available

Listed below are the documents available on the selected Individual. Click the *View* link below to vi... ...e on the selected Individual for linking. If you see a document that matches your specified criteria, choose it from the *Select* column below a...

⊞ Show Filter Options (Showing all records)

Results View: **Summary** | Detailed
Click a column title to sort.

Click on the link to show the filter options.

[Top | Filter Criteria | Bottom]

Document Name	Document Tags	Category	Modify Date	Action
WIOA_APPLICATION_Signed.pdf	Signed WIOA App	General	01/24/2020 11:04	View · Review · Edit · Download · Meta Data · Delete
WIOA_APPLICATION.PDF	App ID:2244260;App Date: 01/10/2020	General	01/24/2020 10:56	View · Review · Edit · Download · Meta Data · Delete
WIOA_APPLICATION.PDF	App ID:2244260;App Date: 01/10/2020	General	01/24/2020 10:52	View · Review · Edit · Download · Meta Data · Delete

◄ ◄ Page [1 ▼] of 1 ► ►   Rows [100 ▼]

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   Link a Document   Complete Online Form

Managing Documents

CalJOBS also allows staff to "**View**", "**Review**", "**Edit**", and "**Download**" documents that have been scanned or uploaded. You also have the option of **uploading a document** from your computer or linking an existing document to a different verification item.

>*Note: If you would like to delete a document, please contact CalJOBS Tech Support to assist you.*

Document Name	Document Tags	Category	Modify Date	Action
WIOA_APPLICATION_Signed.pdf	Signed WIOA App	General	01/24/2020 11:04	View Review Edit Download Meta Data Delete
WIOA_APPLICATION.PDF	App ID:2244260;App Date: 01/10/2020	General	01/24/2020 10:56	View Review Edit Download Meta Data Delete
WIOA_APPLICATION.PDF	App ID:2244260;App Date: 01/10/2020	General	01/24/2020 10:52	View Review Edit Download Meta Data Delete

Page 1 ▾ of 1 ► ► Rows 100 ▾

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   Link a Document   Complete Online Form

Click **Add a Document** to upload a document that is saved on your computer.

Click **Scan a Document** to scan a file that is not directly connected to a field, case note or any other specific item.

It is recommended that all documents be attached to a specific field or case note, but if necessary, general documents can be scanned here.

Click **Link a Document** to associate a document already scanned or uploaded to a different verification item.

This will allow you to scan or upload a document only once and connect to multiple areas in a participant's case file.