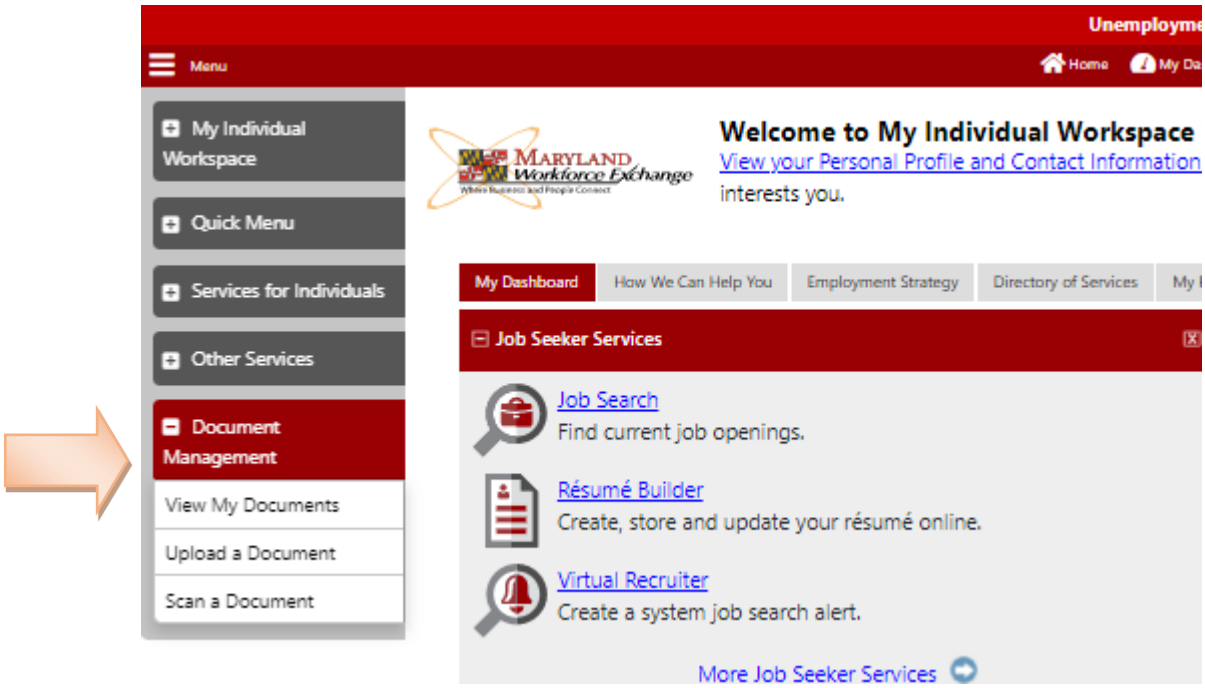
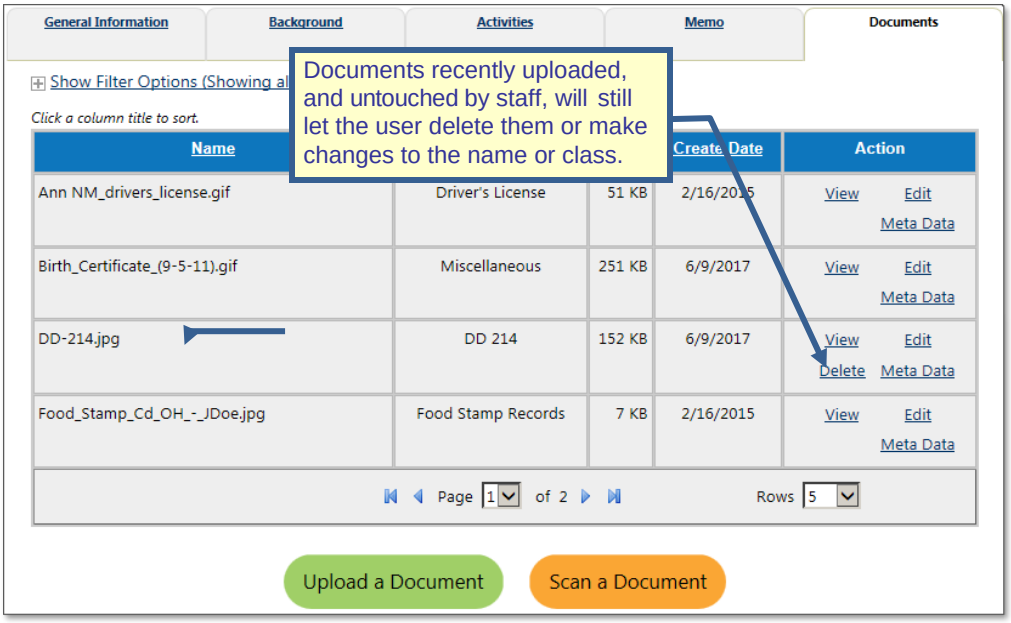
FREDERICK COUNTY
WORKFORCE SERVICES

Individuals Guide to Upload a Document



Documents Tab

The Documents tab lets individuals upload documents, manage any documents they uploaded, and view any documents uploaded by the system or by staff (that are flagged for their viewing).

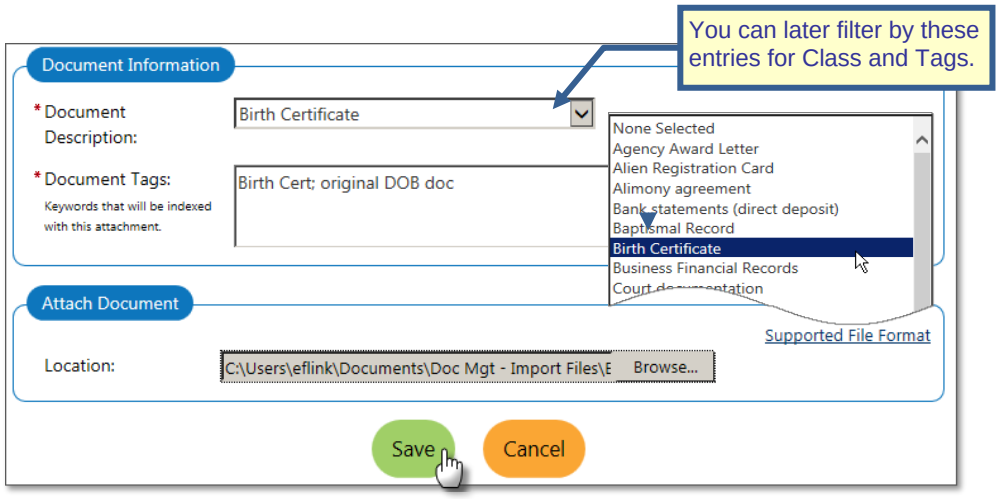


Note: Not all sites include this Documents option. However, if the option is purchased and turned on for staff, it is also turned on for individuals.

There are many points in Virtual OneStop where staff must validate or verify data input through verification documents supplied by the individual. For example, documents are used to verify data as part of qualifying for additional services funded by government programs (e.g., a staff member may ask a client to display a Social Security card, birth certificate, or driver's license to verify information). Individuals may upload documents to assist staff in their verification, and may then review documents whose images are stored for them as part of this verification.

To add / upload a document:

- **Click** the Documents tab, then click **Upload a Document** button. The Add Document screen displays.
- On the screen that opens, select a description of the document from the *Document Description* drop-down list. (This will be the displayed *Class*.)

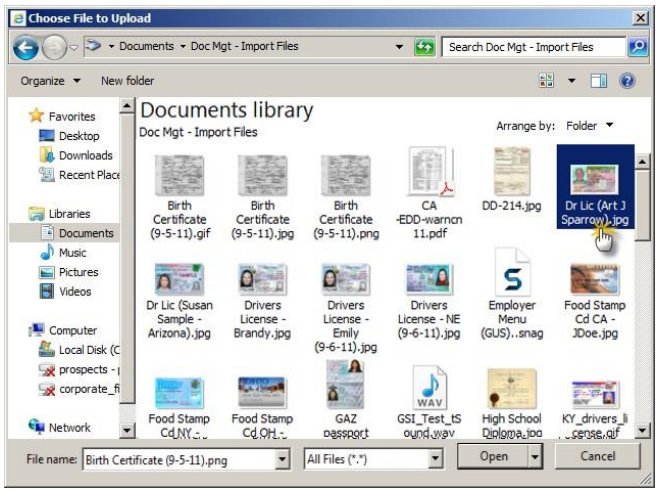


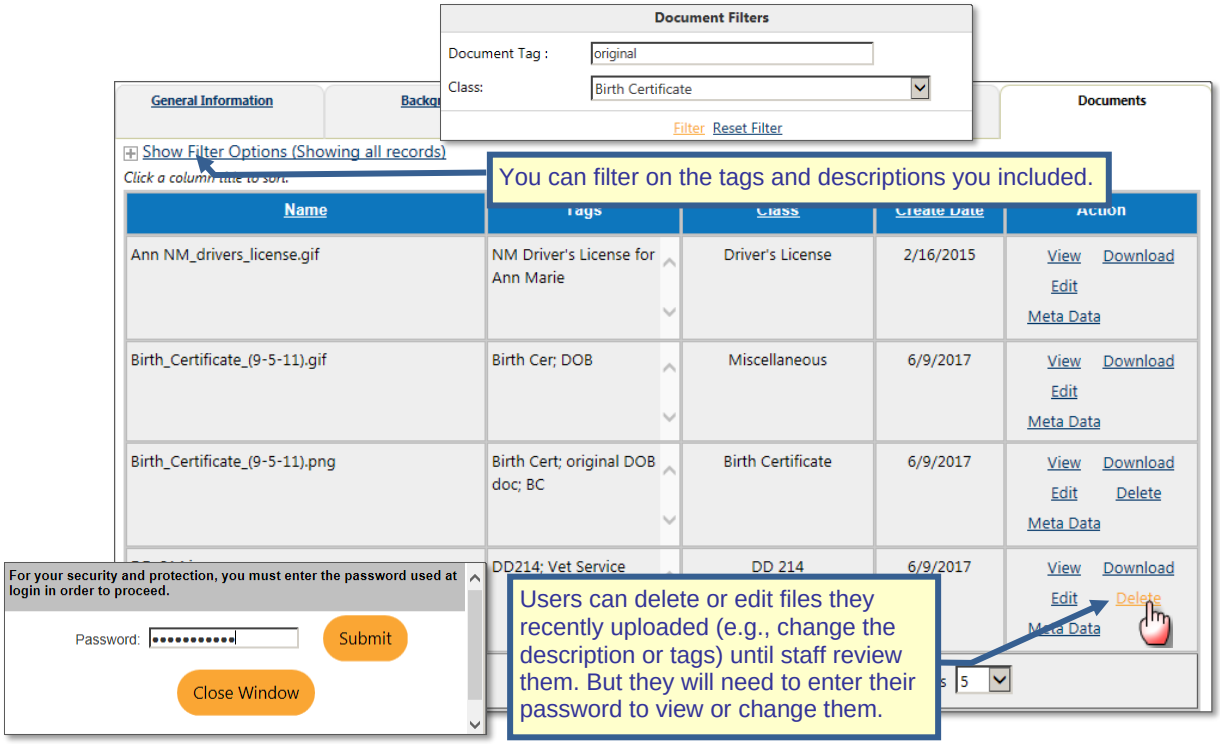
Upload Document Screen & Document Description List (Partial)

- Enter the *Document Tags* in the text field provided. (These will be indexed with the document, and helps staff search and individuals filter or search for the document.)
- Attach the document.
  - Select the **Browse** button to locate the file you wish to upload (or **Choose File** for Chrome browsers)
  - Choose the file to upload.

    Note: *You can click a Supported File Format link to see a list of supported file formats.*

  - Press **Save** as the final step to save aand upload the document.





General Profile, Documents Tab (After Adding Documents)

After you have uploaded the file it displays in the list on the Documents tab. You can click the View link at the right of each document to see the image and other details for the document.

Note: *The Class column reflects the drop-down selected for "description." If the user has many documents on this tab, they can filter by a Class and/or by specific words in the Document Tags (and use the Tags column to help identify the specific document).*

Users can also click links for viewing and changes: View to open or download the image, Edit to change the description or tags, Meta Data to change only the data tag, or Delete to remove the document. This is allowed until staff reviews/validates the document. After that, Delete will not display, and Edit and Meta Data will open a screen without the ability to make changes. Users will need to enter their password to view, edit, or delete their documents.

To scan and save a document:

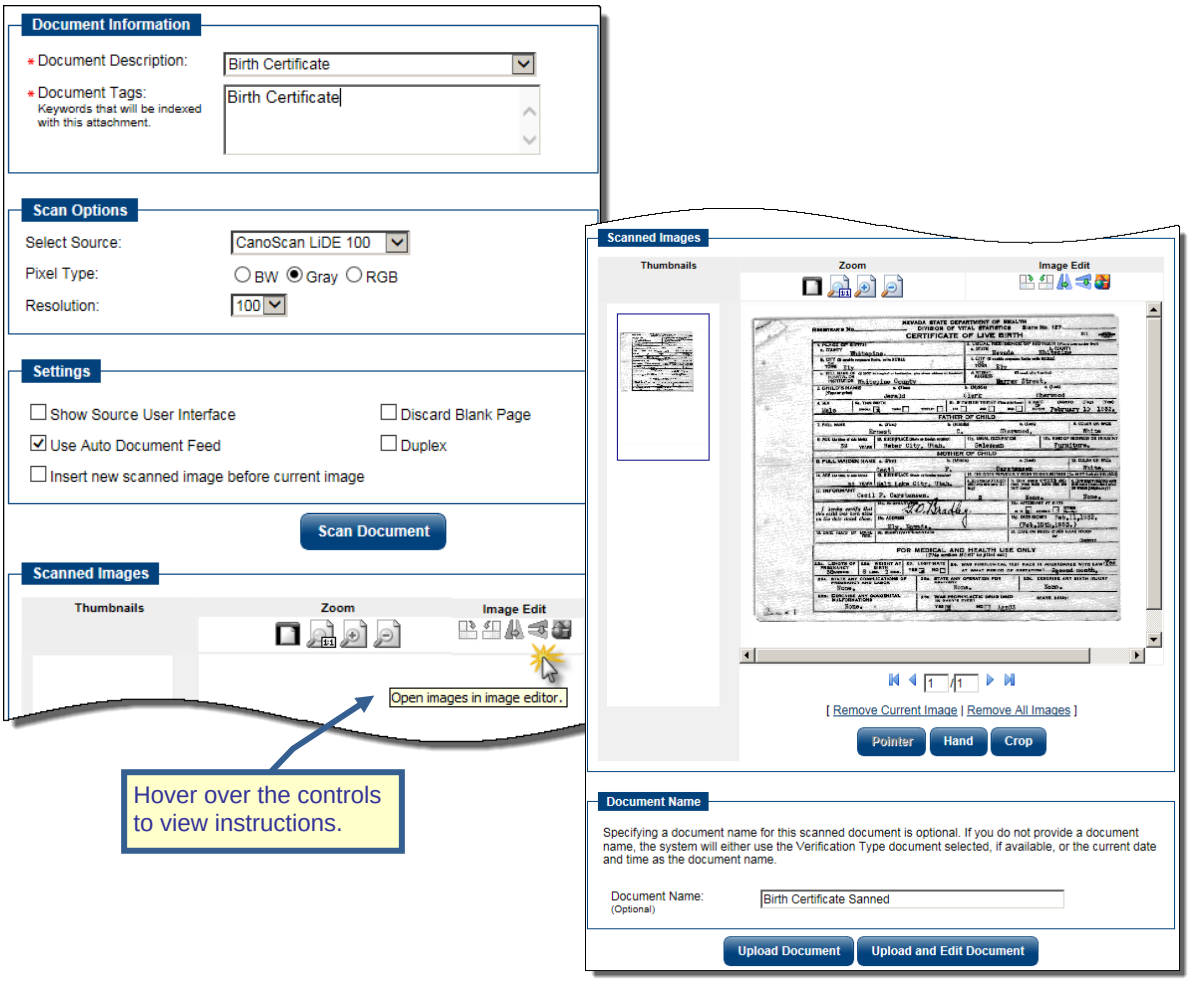
Individuals whose systems include scanning capabilities, can scan a document and add the file to their Documents tab. The process is started similarly to the Upload a Document process.

- **Click** the Documents tab, then click the **Scan a Document** button.
- In Documents Information:
  - Select from the *Document Description* drop-down list. (This will be the displayed *Class*.)
  - Enter the *Document Tags* in the text field provided.
- In Scan Options:
  - Review the parameters in the Scan Options and the Setting areas. Change any of them as required (e.g., the source scanner or the color setting).
  - Select the source of the document from the *Select Source* drop-down list. (If there are no scanners displayed in the drop-down list, it means that the system cannot find any scanners connected to the computer.)
  - Select the *Pixel Type* (BW, Gray, or RGB). (Color usually increases the file size.)

- Select the *Resolution* of the scanned image. (Higher resolutions result in better quality scanned images but make the file size larger.)

- In Settings:
  - Select all the checkboxes that apply to the scanned document.

    Checkboxes are dependent on the scanner (e.g., a flatbed scanner may not have Auto Document Feed or Duplex settings).



Scanned Document Screen (Partial)

- Click the **Scan Document** button (to perform the image scan).
- Preview the document in the Scanned Images section of the screen. Users can move, align, and crop the image using the controls on the screen.
- Enter the name of the document in the *Document Name* field.
- Click the **Upload Document** button to upload the document into the system.

  A confirmation box will indicate the document is uploaded. You can then continue to make any changes from the screen, or return to the previous Documents tab view.