Procedures for Securely Uploading Documents to AOSOS

Required Equipment

PC with an attached scanner connected via USB (not a network accessible scanner)

Step 1 - Creating and Securing the "AOSOS Uploads File on Your PC (You only Need to do this once - the first time you upload)

1. From Windows Desktop, right click somewhere in the blue space
2. From the menu, click "New" and then click "Folder"
3. You will now have a folder called "New Folder" on your desktop
4. Right click on the "New Folder" and then click on "Rename" – rename the folder "AOSOS Uploads" (no quotes)


5. Right click on the "AOSOS Uploads" file and click on "Properties" and "Advanced" then click "Encrypt contents to secure data" – hit ok and ok again to close the dialog boxes
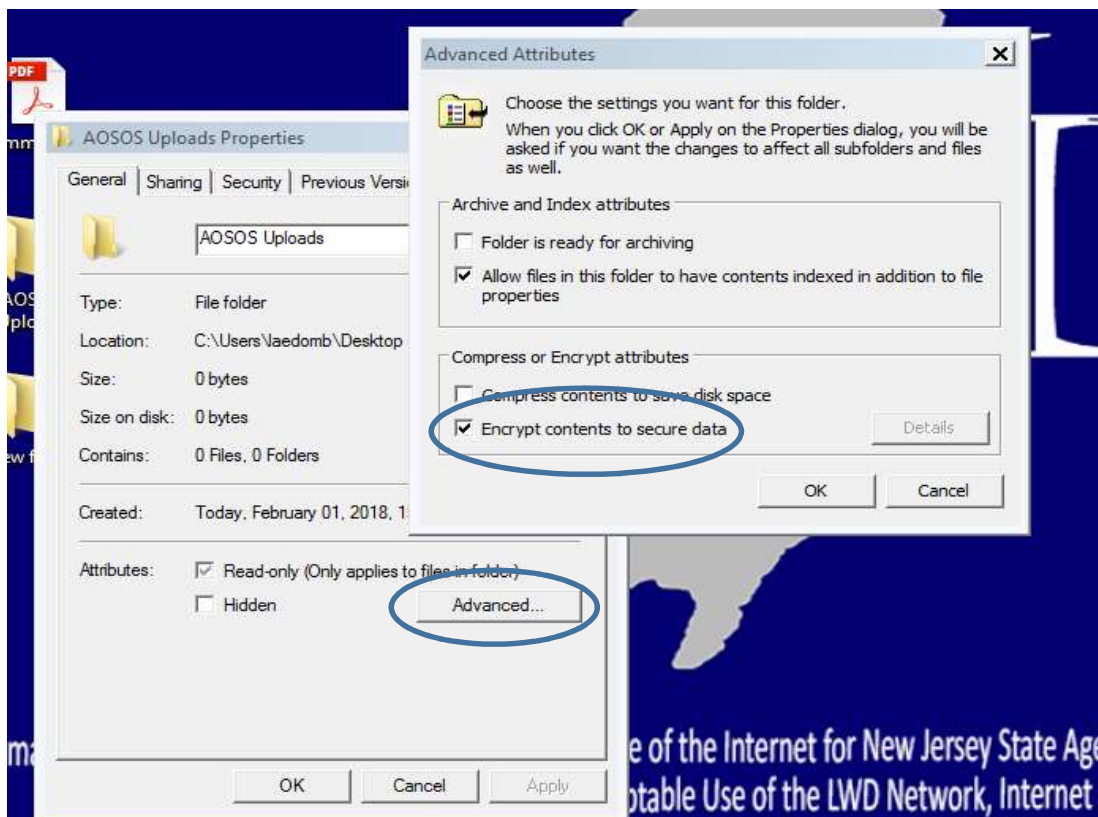
Step 2 - Uploading Documents to "AOSOS Uploads" Folder

1. Photocopy the customer's document and write their AOSOS Registration number on the photocopy.

2. Scan the document as a PDF, name the document using the AOSOS Registration Number and the document type (such as NJ123456789 Driver's License) and save the document to the "AOSOS Uploads" folder. See *Attachment Types and Document Names* table on the last page of these procedures for the allowable document names. Capitalization is not required, and spaces may be used.
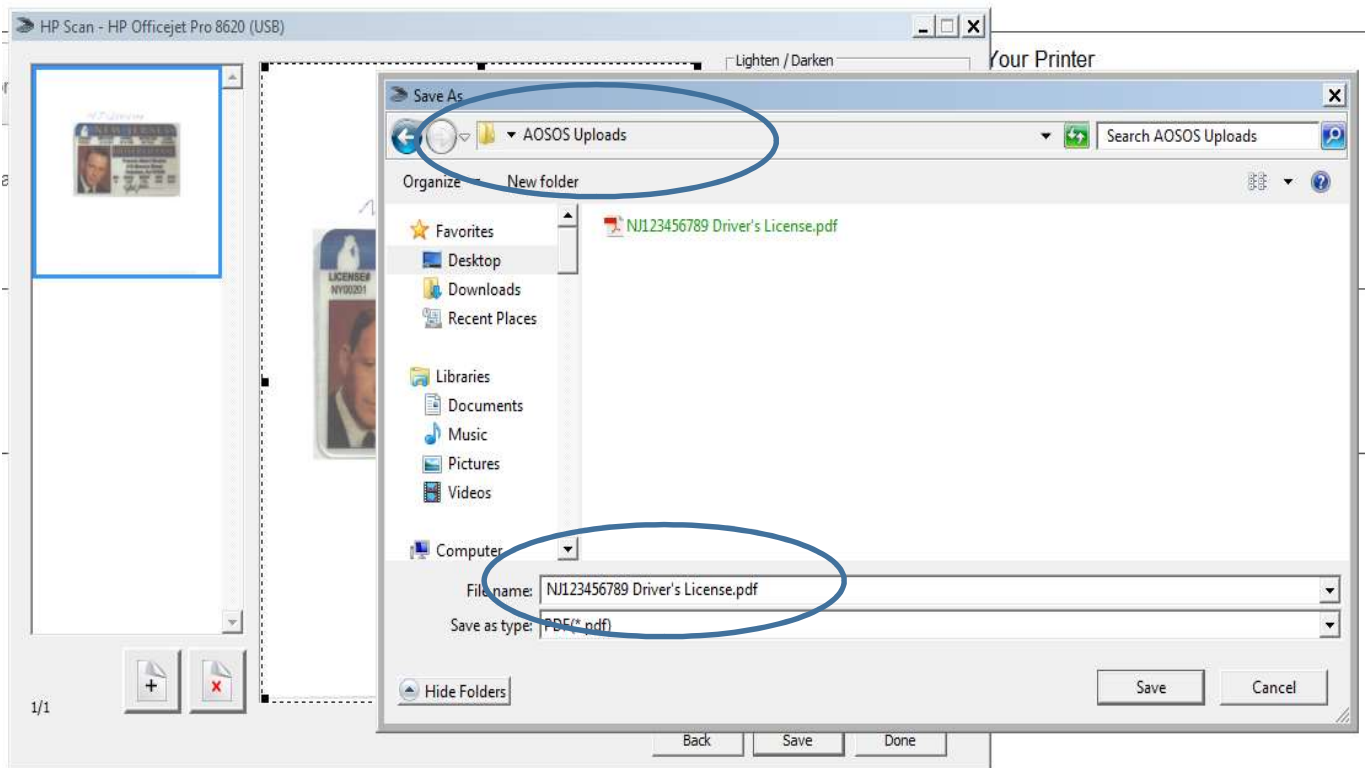
## Step 3 - Uploading Documents from PC to AOSOS

1. Logon to AOSOS

2. In the **Customer Detail** module go to the **Attachments** tab and click **Add Attachment**
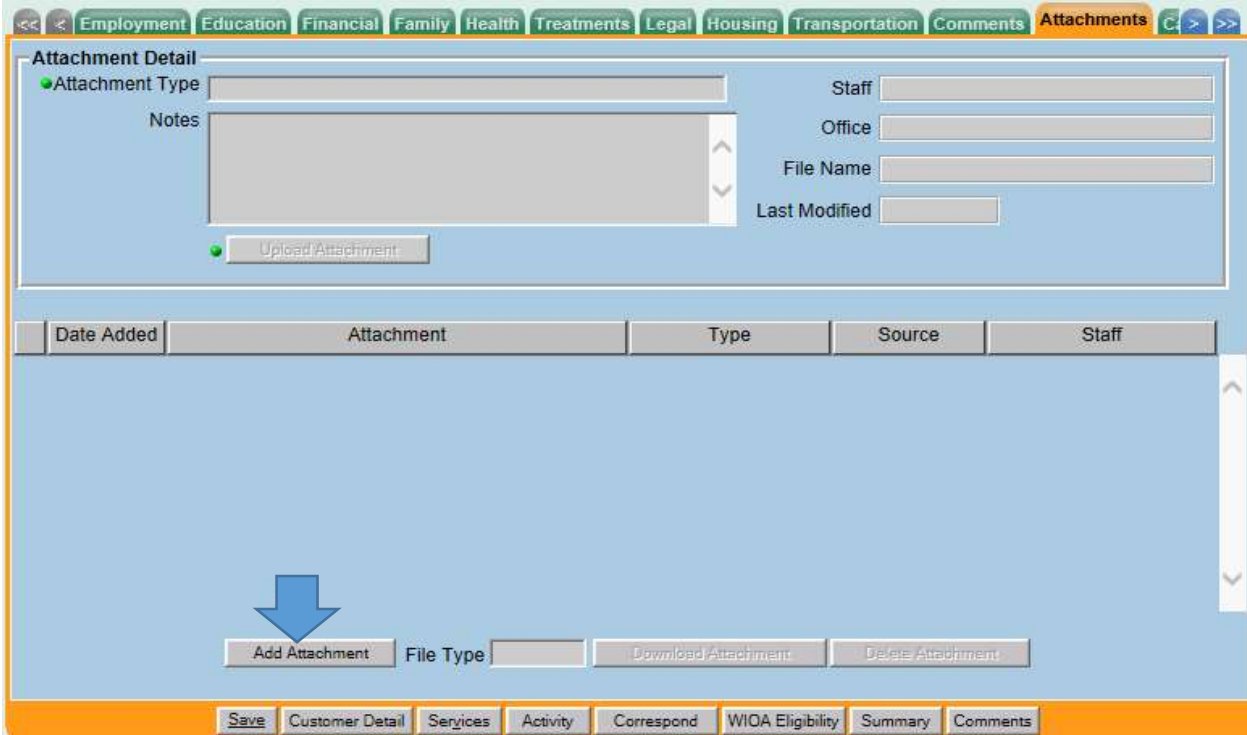
3. Based on the document being uploaded, select the **Attachment Type** from the drop-down menu. The options are: C*ase Management, Credential Attainment, Skill Gains, Eligibility or Wage Information*-see *Attachment Types and Document Names* table below. For example, if the document is a birth certificate. The Attachment Type would be *Eligibity*. Then click **Upload Attachment**.
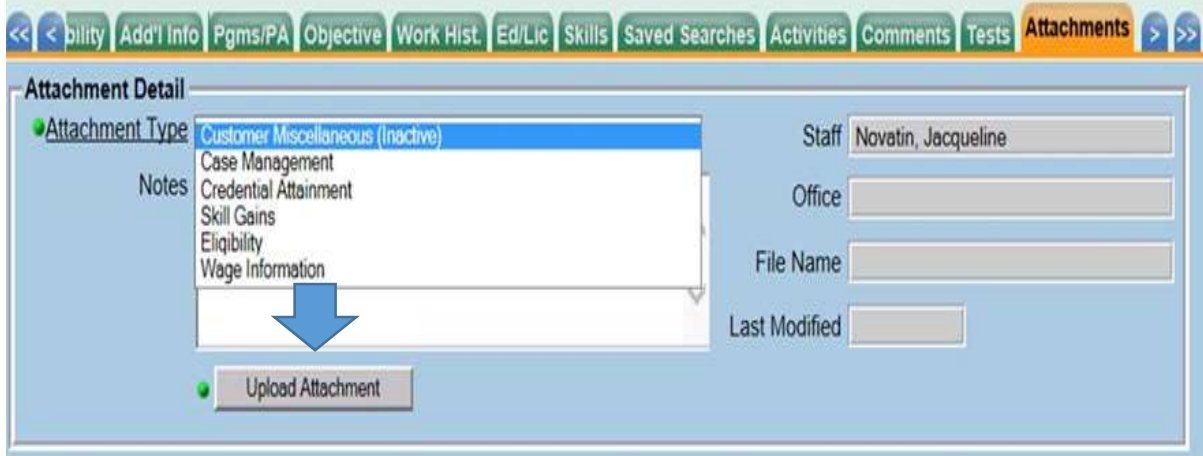
4. Browse on your PC and find the document in that specially developed folder, highlight/select it and then click **Open**.
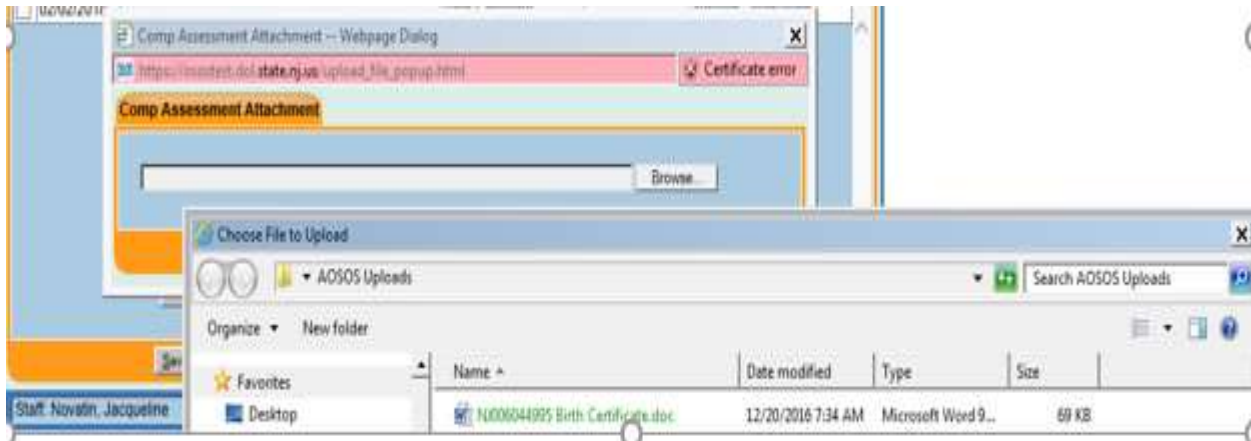
5. Once the location/document is in the popup, click **Upload** then save.
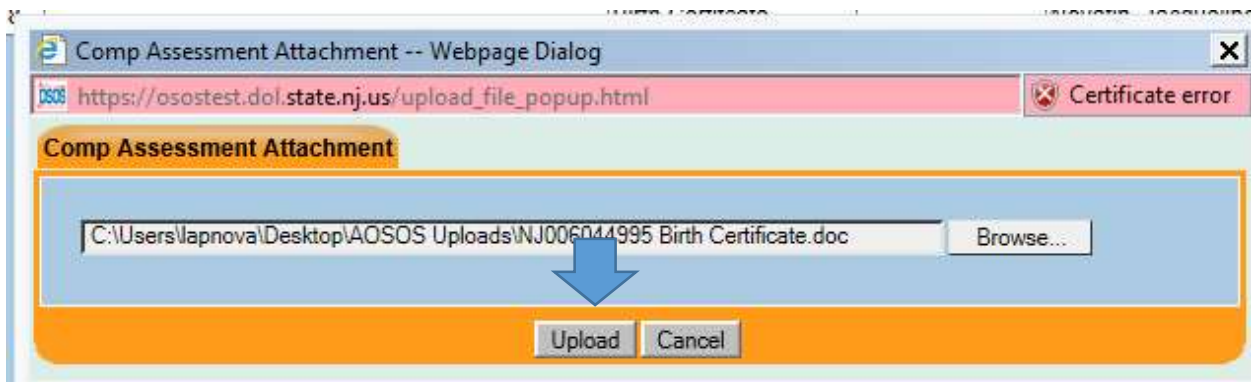
6. The screenshot below shows a record with a successfully uploaded document.

Attachment Types and Document Names

Attachment Type	Document Names
Case Management	- Intake Form - Individual Service Strategy - Employment Plan - Resume - Self-Certification Form (Form D)
Credential Attainment	- Certificate - Apprenticeship Certification - License - Associate degree - Baccalaureate degree
Skill Gains	- Standardized Assessment Test Name Pre and Post) **Examples:** TABEpre-Test; TABEpost-Test; CASASpre-test; CASApost-test - Secondary School Diploma - Secondary School Equivalent - School Transcript - Report Card - Progress Report* - Exam Scores (*On-the-job training or Registered Apprenticeship)
Eligibility	- Birth Certificate - Driver's License - Passport (indicate US or foreign) - School ID - Court Document (can state specific-marriage, adoptions, divorce); - Military ID (DD-214) - Social Security card - Self-Certification (Form D)
Wage Information	- Pay Stub - Tax Return - Survey - Letter **Note**: Quarter would be decided by date