

DYCD CONNECT

PARTICIPANT TRACKING SYSTEM:

*Workforce Innovation and Opportunity Act
docUP – Secure Document Upload Guide*

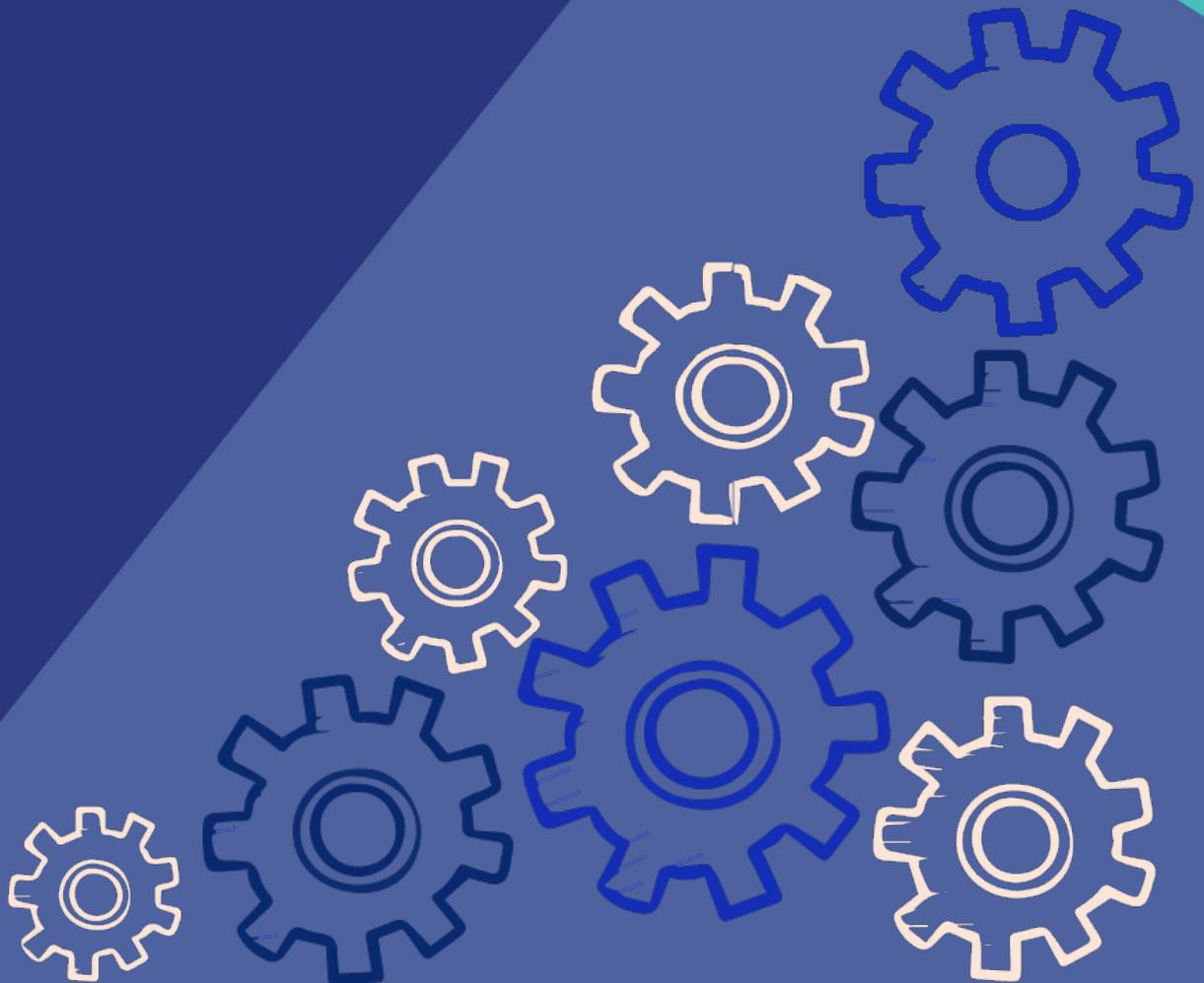


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What is **docUP** Secure Document Upload?

docUP Secure Document Upload is a mobile app that allows providers to upload supporting documentation for their clients, to help them apply to DYCD funded programs, using their mobile device. They will need to enter basic information specific to the program and they are ready to go. No account creation is required, and the app can be used as many times as needed to upload all the supporting documents the DYCD program requires.

Once uploaded via the mobile upload app, the provider and DYCD users will access to review and process an applicant's documentation. Each client's application will have its own document inbox where submitted documents can be reviewed and validated. Due diligence will be completed by the provider and DYCD users to determine if the documents uploaded are sufficient for accepting the applicant into the program. Once all the needs are met, the application is ready to be processed and approved in DYCD Connect.

To protect data and for privacy concerns, all documents uploaded to the data manager will be purged and deleted as outlined:

Document status deletion timeline:

RETURNED (deleted after 24 hours)

REJECTED (deleted after 24 hours)

ACCEPTED (deleted after 60 days)

How do I Access **docUP**?

Once installed, **docUP** will be available on your phone as an app.

This screen is displayed when the app is launched and while the app is connecting with the server



Landing Page, Disclaimer and Tips

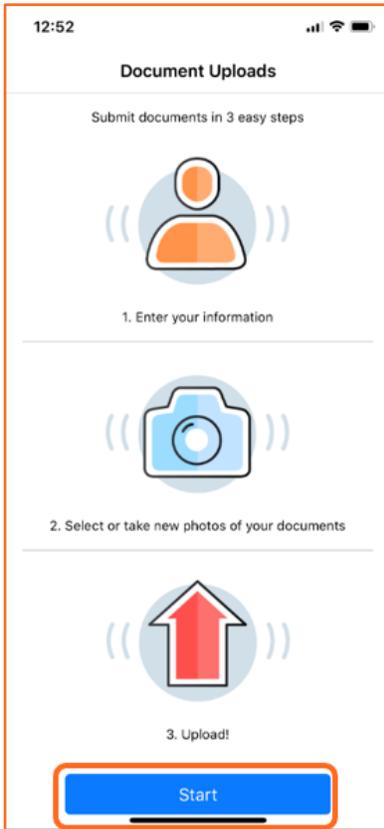


Figure 2: Landing page

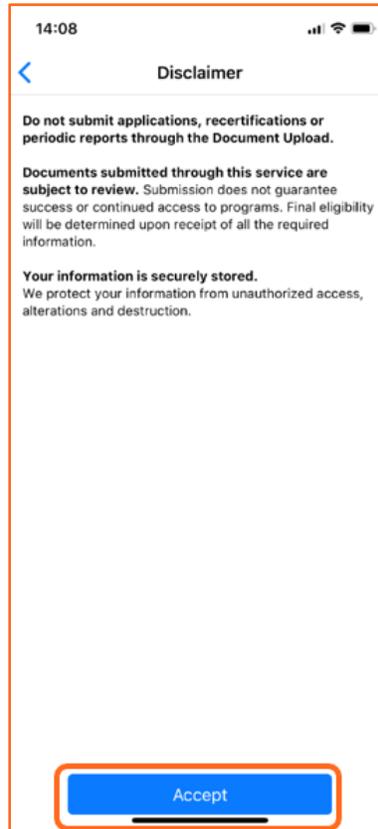


Figure 3: Disclaimer

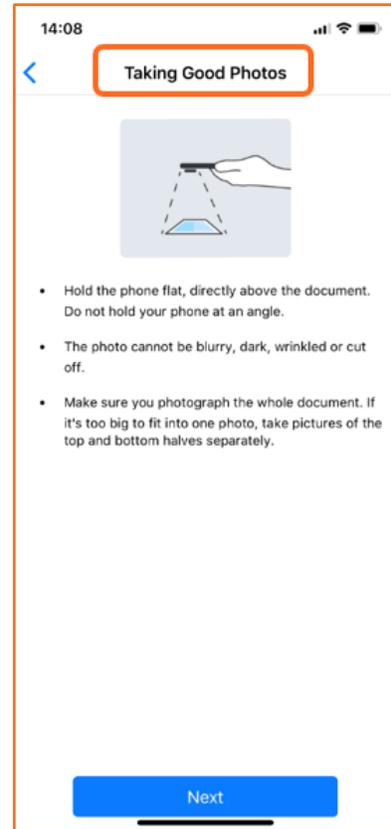


Figure 4: Tips

The landing page identifies the steps the user must take to upload the documents. The user must select **“Start”** to start the document upload process. The disclaimer must be **“Accepted”** by the user to continue. The tips provided guide the user in **taking good photographs**.

Cover Sheet

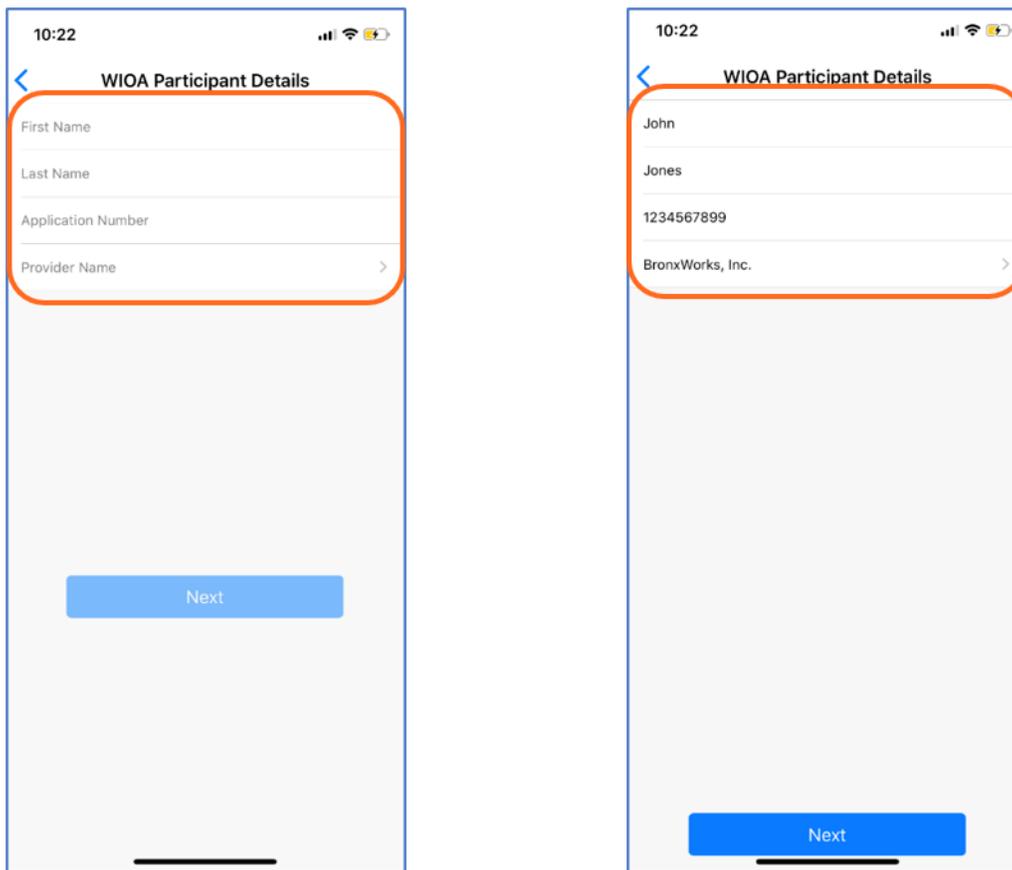


Figure 5: Coversheet – blank and populated

The user needs to enter the participant details like the **“First name”**, **“Last Name”** and the **“Application Number”** (from DYCD Connect). The application number is a 10-digit number with no letters or special characters. The **“Provider Name”** should be selected from a list. (**The format of the application number is a 10-digit number that comes after **REG-0000000000**, in PTS listed as **Registration Number***)

A combination of the clients First Name, Last Name and Application Number, along with the Provider Name will map the uploads with the client’s application in DYCD Connect.

NOTE: Verify the client’s name, application number and provider name when uploading supporting documents. This ensures that records are mapped appropriately. Providers will only be able to see applications that have been uploaded and mapped to their respective cue for review.

All applications relevant to a Provider users' organization are displayed for the Providers to review.

Select Document Category & Upload Document

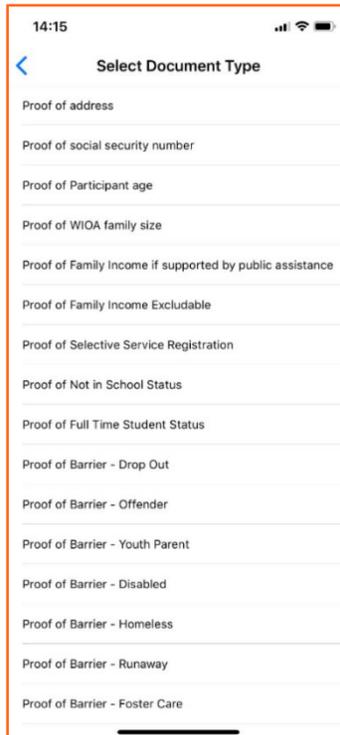


Figure 6: Select Document Type

The device's camera is utilized to take a photo of a document.

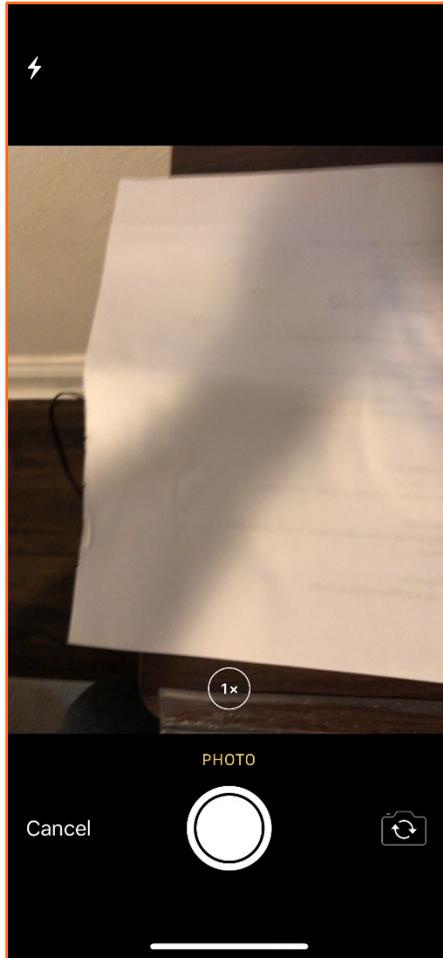


Figure 7: Take Photo

Users have an option to add another photo to complete the upload they are looking for – some supporting documents may span multiple pages.

When a user selects the back arrow from the screen, a message appears stating:

“Are you sure you want to discard this document. Your data will not be saved.”

Selecting “Yes” returns the user to the document categories page to re-select an option. Selecting “No” cancels the deletion and returns user to the document review page.

An error is shown when the user selects **“Not done, add more photos”** and the limit for the document categories has been reached, as follows - “Maximum number of photos reached. Please press upload to submit. If you have more pages, you can restart and submit a separate upload.” (**The system will tell you when you have reached your attachment limit*)

Confirmation is required when a user clicks **“Document complete, upload.”** - “Are you ready to upload this document?”. The user has the option to select “Yes” or “No”



Photos taken from the user’s mobile device will be uploaded in PDF format to the data manager. Multiple photos taken by a user or selected from their photo gallery as part of their upload will be collated together in a PDF format and uploaded to the data manager.

Upload Successful

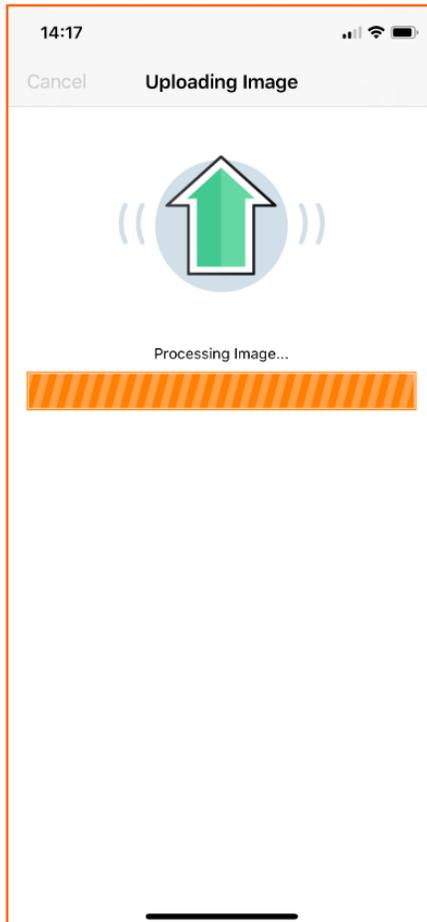


Figure 9: Processing Image

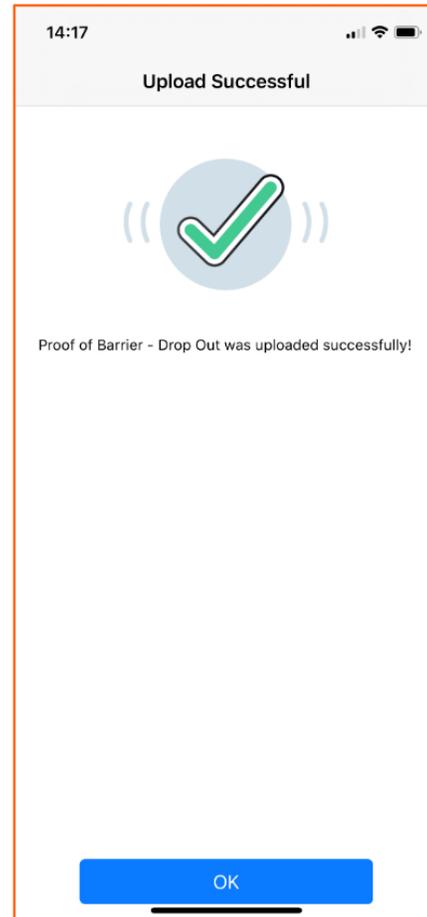


Figure 10: Upload Successful

A message is displayed when a document is successfully uploaded as shown above.

Users can select cancel and stop the upload while it is processing. If selected in time, no document will be uploaded to the data manager and the user is returned to the 'Document Review' page.

Once document upload is complete, the document will be available from the data manager and linked to the user's name, application number and provider name entered on the coversheet of the Uploads app.

Programs may require multiple documents to be submitted to support an application – as such, an option to redirect the user back to the 'Select Document Category' page is available.

This option will remain available unless the session times-out due to inactivity.

Session timeout is set at 6 minutes of inactivity. Upon session timeout, users are pushed back to the landing page and a relevant message is displayed.

*(*User must re-enter the Name and Registration Number again to add more documents or move to the next Profile/Participant)*

Next Document

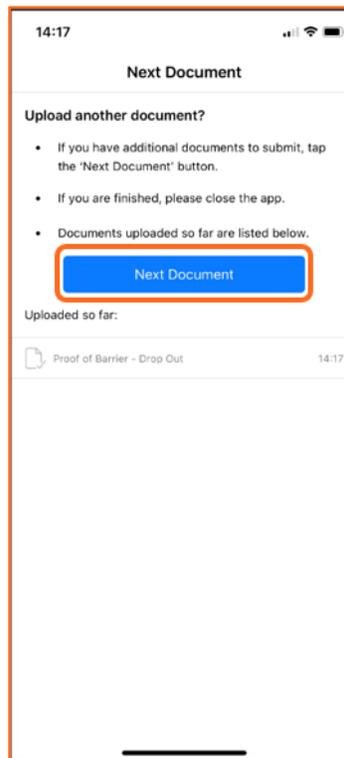


Figure 11: Next Document & Uploads List

Users are presented with an option to submit more documentation from the **“Next Document”** screen. To help the user complete their document package, a list of documents submitted during this session is provided. Users are free to upload as many documents as needed. Once finished, users are advised to close the app. This will end their session and subsequent uploads would need to be submitted via a new session.

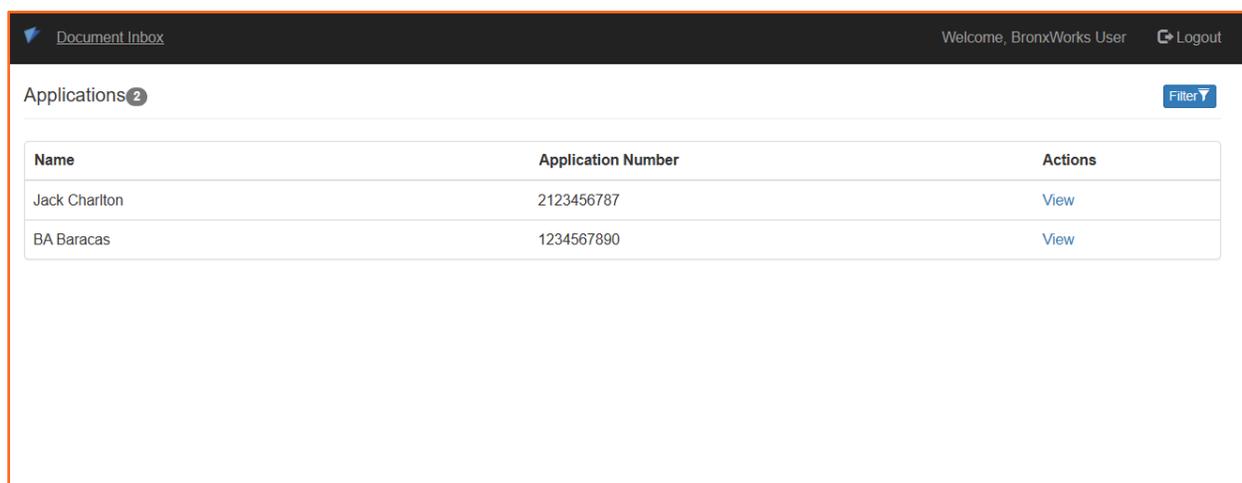
Data Manager

The data manager offers providers and DYCD users a mechanism to review all documents submitted via the mobile uploads app. Users will leverage the data manager to compile a document package to support an applicant's application to a DYCD funded program.

Accessing the Data Manager

To access the data manager, users must navigate to the relevant webpage via the URL provided - <https://docup.dycdconnect.nyc>. The user gets logged in automatically.

The user will be presented with a full list of all applications within their location by default.

The screenshot shows a web interface for a 'Document Inbox'. At the top right, it says 'Welcome, BronxWorks User' and has a 'Logout' button. Below the header, there's a section titled 'Applications' with a notification badge showing '2' and a 'Filter' button. A table lists two applications: 'Jack Charlton' with application number '2123456787' and 'BA Baracas' with application number '1234567890'. Each row has a 'View' link in the 'Actions' column.

Name	Application Number	Actions
Jack Charlton	2123456787	View
BA Baracas	1234567890	View

Figure 13: Provider User - Applications Page

Filtering the List

Clicking on the **“Filter”** will enable the filter function for the columns presented. Users can filter by the column by typing in the column heading, which becomes a free text field.

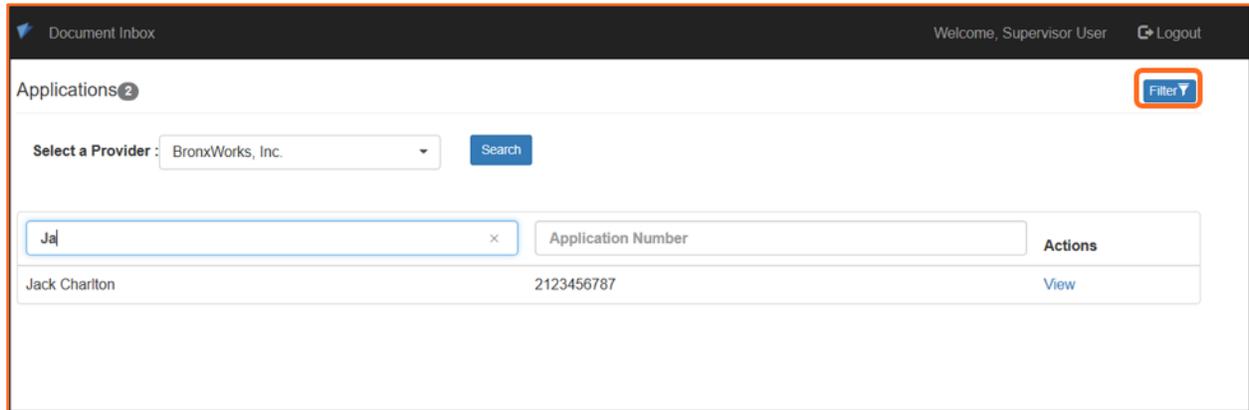


Figure 15: Filter criteria entered – Provider User view

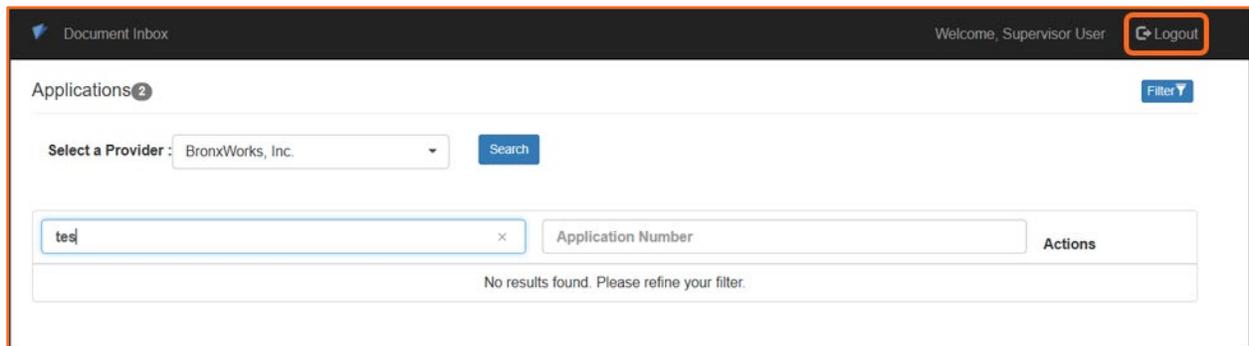


Figure 16: No results found with filter

Provider users will only be permitted to view applications assigned to them.

Having completed their tasks, users can logout from the data manager by clicking the **“Logout”** button in the application banner.

Viewing Documents

The screenshot shows a web application interface for document management. At the top, it says "Document Inbox" and "Welcome, BronxWorks User" with a "Logout" link. Below this, the user's name "BA Baracas (1234567890)" is displayed with a notification badge showing "51".

On the left side, there is a list of documents with the following entries:

- Proof of Participant age: Aug 5, 2020 12:31 PM, ACCEPTED
- Proof of High School Graduate: Aug 5, 2020 11:03 AM, NEW
- Proof of Participant age: Jul 28, 2020 3:55 PM, SUBMITTED
- Proof of social security number: Jul 28, 2020 3:54 PM, REJECTED
- Proof of Family Income if supported by public assistance: Jul 28, 2020 3:54 PM, ACCEPTED
- Proof of social security number: Jul 28, 2020 3:47 PM, NEW
- Proof of social security number: Jul 28, 2020 3:47 PM, NEW (highlighted in blue)

The right side shows an "Uploaded Document" viewer for "1 of 1" documents. The document is titled "WIOA COVID-19 Basic Skills Screening Tool" and includes logos for NYC Department of Youth & Community Development, WORKFORCE CONNECT, and TRAIN & EARN. The document content includes:

Last Grade Completed:

Applicant Name:

1)	Do you have a high school diploma, General Education Development (GED) certificate or High School Equivalency Diploma (HSED)?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Currently in high school (does not include GED or HSED programs)
2)	Can you follow basic written instructions and diagrams with no help or just a little help?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No		
3)	Can you fill out basic medical forms and job applications?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No		

Figure 18: Provider user – Actions & Status

Click on “View” against the application for which you would like to view the documents.

The heading contains the applicant’s full name and corresponding application number. The number of documents uploaded for the applicant is also highlighted.

Each uploaded document will display as a tile in the data manager in the left pane. Users select a document from the list to review an action. Select the document name in the left pane to view the document. The highlighted tile indicates the selected document being reviewed.

The document selected is displayed in the viewer pane on the right side of the screen. This is a scrollable viewer that allows users to use the zoom feature.

Once reviewed, the user has the ability to “Submit” the document to DYCD for approval.

Actioning the Documents

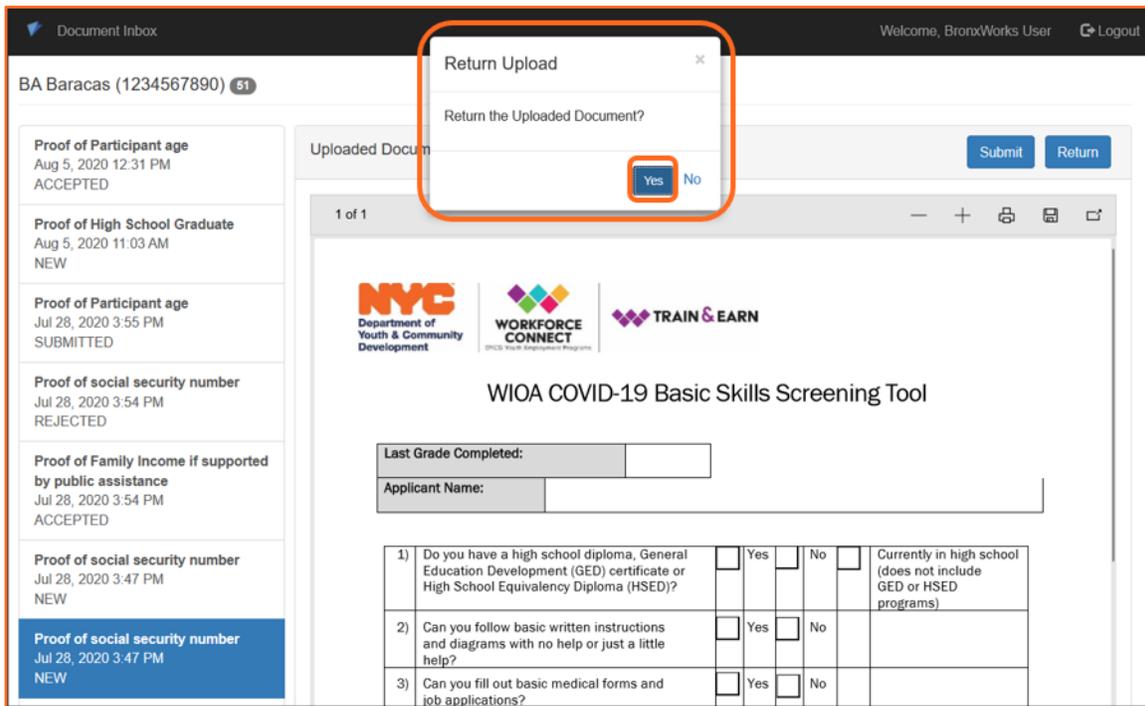
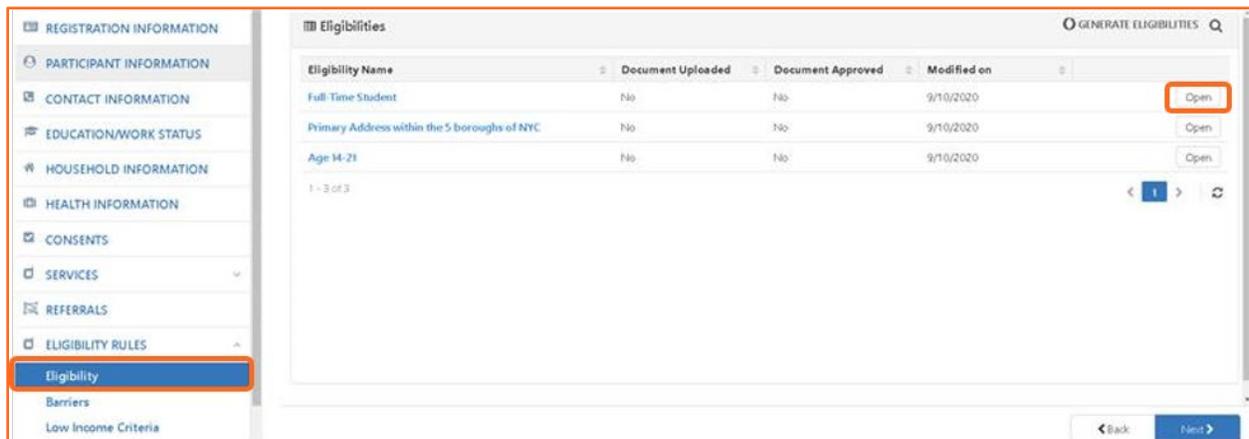


Figure 19: Provider user – Return document

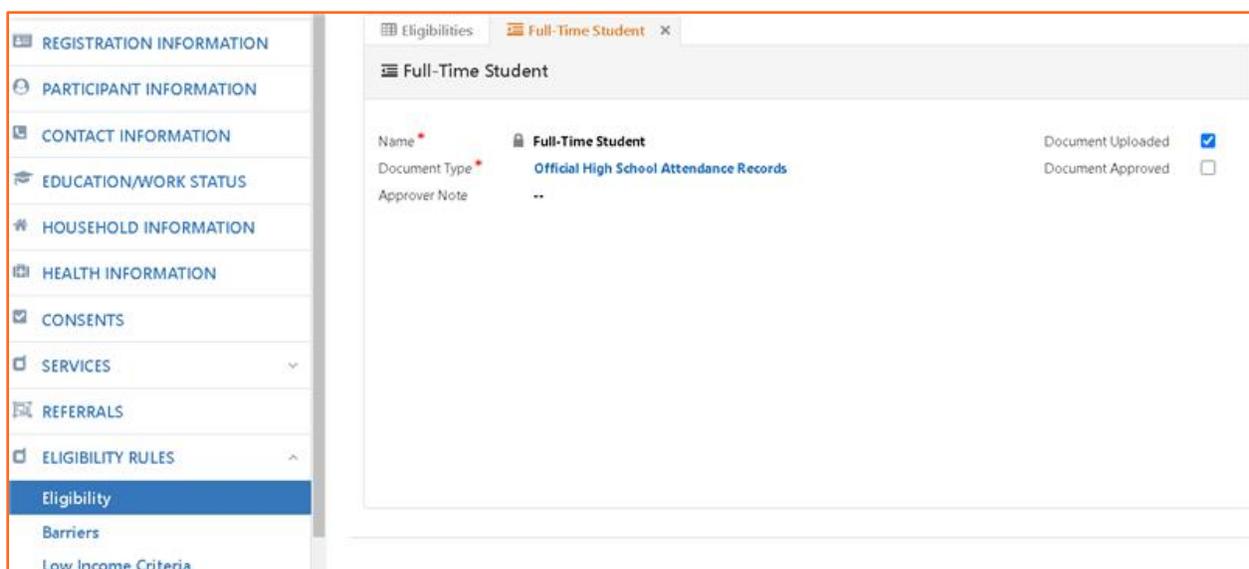
If a document is deemed insufficient quality or does not meet the requirements for a document category, a provider can **“Return”** a document. Documents in a RETURNED status do not appear in the data manager.

DYCD Connect Functionality

The user needs to mark the documents uploaded in DYCD Connect. The user will need to navigate to the Applicant's information in DYCD Connect. Navigate to the **"Eligibility Rules"** section next.



Select the eligibility rule that you want the document to be marked uploaded for by clicking **"Open."** This will take you to the tab where you will be able to mark the document uploaded. This needs to be done for all the required documents needed to validate eligibility.



DYCD Connect Help Center

If you have any questions or concerns, please submit a ticket or request to the DYCD Connect Help Center. You may navigate to the help center directly from the banner at the top of DYCD Connect by clicking on the question mark as shown below.



Alternatively, you may submit a ticket through the [Help Center](#) on the DYCD Connect homepage.

DYCD RESOURCE CENTER

DYCD Connect is the main resource center to help organizations communicate and coordinate with the communities they serve.

- DYCD WEBSITE**
View DYCD's public website for information about our funded programs.
- CB CAPACITY BUILDING**
DYCD invests in building the capacity of nonprofit organizations as a strategy to help ensure that youth and families receive high-quality services.
- HELP CENTER**
Having trouble? Send a message to our support team through the Help Center.
- F.A.Q**
Read Frequently Asked Questions to learn more about DYCD Connect.

DYCD HELP CENTER

The DYCD help center is where you can find resources to help with the technical and operational issues you may come across. Here you can contact DYCD support directly or look into additional resources and guides that can help you move forward with your tasks.

first name Enter your first name **last name** Enter your last name

phone Enter your phone number **email** Enter your e-mail address

organization Select an Organization

program area Select a Program Area **program type** Select a Program Type

I am a DYCD employee

Select if you need operational or technical help:

NEED TECHNICAL ASSISTANCE?
If you are having a technical issue related to logging in, accessing your services, or experiencing a bug, contact the technical help desk

NEED OPERATIONAL ASSISTANCE?
Having trouble performing your existing operations using the new systems and tools within DYCD connect? Get in touch with a program specialist

Detailed Description:
Enter a detailed description