WIOA Adult/DW/DWG/Youth and Discretionary Funds EBRIDGE ELECTRONIC FILE MANUAL

OVERVIEW

Records management is a critical component in information governance. As a recipient of federal funding and documents, RWP and its sub-recipients have a significant responsibility to demonstrate the proper care and management of its records. In addition to the RWP File Management Program Standard, this manual will act as a process to organize and maintain records in such a way that they can be located, viewed, and disposed of in a straightforward manner. While the focus has changed from paper to electronic records, RWP standards remain much the same across formats.

★ Denotes sections of importance when getting started.

We would like to thank the help of Ami Maceira-McSparin of the Willamette Workforce Partnership in creating this manual.

Contents

Fundamentals

Purpose

A well-designed filing system will offer quick and easy storage in the retrieval of information, ensuring integrity and continuity of recordkeeping practices, align with the retention periods of the records it contains, be expandable and flexible enough to meet users' needs, and reduce the costs of storing obsolete records. To achieve a well-designed filing system, adherence to the guidelines is required.

Security

Participant documentation will be maintained in eBridge. In the case where participant records are scanned and imported into eBridge, the paper file will be shredded or similarly destroyed after sub-recipient confirms the paper file is correctly entered into the system. Non-confidential records may be recycled.

1. **Scan**
2. **Upload** to eBridge
3. **Confirm** Scan Successful
4. **Shred** paper copy

Note: If a locked physical cabinet is created for the retention of necessary **medical** documents, those would not be scanned to ensure no medical information is entered into any case management data collection system.

Participant records created and maintained within eBridge are considered the official record copy and no electronic record entered in eBridge shall be deleted without prior approval of RWP. All user activity, including viewing, adding comments, printing, is automatically recorded by eBridge and is subjected to audit by RWP, Higher Education Coordinating Commission (HECC), Department of Labor, and/or other approved RWP auditors.

Timeframe

Documentation is required to be entered into eBridge within 5 business days of the I-Trac entry that corresponds with the document (reference: RWP Data Entry Policy).

Definitions

To ensure participant records are indexed in the correct areas, the following definitions will be used for categorizing files (for examples see Appendix B):

- **Assessments (Adult/DW/Youth/JOBS)**: All assessment documents for Adult/DW/Youth/JOBS participants from the start of Participation and after. This includes the **Basic Literacy Assessment** for **Youth.**
- **Contractor (Adult/DW/Youth/JOBS)**: Provider Name (e.g. WSRV, SO Youth

Works, TANF/JOBS)

- **Correspondence:** Letters, emails, and written communication to/from the participant, another agency, or training provider that is not considered an assessment, credential, or employment verification BEFORE the participant exits (for correspondence after exit see Follow-Up below).

- **Credentials (Adult/DW/Youth/JOBS)**: Documentation used to verify the credential recorded in the Credentials section under the Outcomes tab in I-Trac. Includes High School/GED, Post-Secondary Diplomas, and DOL approved Occupational Certifications from the Oregon ETPL.

- **Eligibility (Adult/DW/Youth/JOBS)**: Any documents gathered for the completion of eligibility and enrollment.

- **Education Verification at Exit (Youth)**: Any documents verifying secondary, post-secondary, military, Registered Apprenticeship, or Occupational Skills training placement at or during the exit period. Documents should verify information recorded under the Outcomes tab in I-Trac.

- **Employment Verification (Adult/DW/Youth/JOBS)**: Any document verifying employment (both during the participant's active or exited status). Documents should verify information recorded under the Outcomes tab in I-Trac.

- **Financial (Adult/DW/Youth/JOBS)**: Documentation that verifies whether the participant received a payment, or the payment was made on behalf of the participant. Documents must match I-Trac (related Services and Case-Notes) and Smartsheets Financials.

- **Follow-Up (Adult/DW/JOBS):** any correspondence with or related to the participant that occurs AFTER exit.

- **Follow-Up (Youth):** any correspondence related to the participant that occurs AFTER exit including Follow-Up Services that match Financials if funds are provided.

- **Funding Stream (Adult/DW/JOBS)**: All participant files scanned into eBridge must include a funding stream identifier. The Funding Stream should match I-Trac records.

- **Goals and Plan (Adult/DW/Youth/JOBS)**: Includes formal plans and documented goals at time of enrollment and any modifications until exit.

- **Incentive Activity and Agreement (Youth)**: Any documentation that shows an incentivized activity was completed. Documents must match I-Trac (Service and Case Notes) in addition to Smartsheets Financials.

- **Measurable Skills Gain (Adult/DW/Youth/JOBS)**: Documentation used to verify the Measurable Skill Gain recorded under the Assessments tab in I-Trac.

- **Non-DOL Credentials (Adult/DW/Youth/JOBS)**: Any credential gained that does not satisfy the definition of a Credential (see Credential above). Examples.

- **Program Year (Adult/DW/Youth/JOBS)**: The program year that the documentation occurs. Please use the format (PYXX where XX = the last two numbers of the Program Year). Note that the PYXX can be different if the participant starts in one PY and completes in another, such as Eligibility added in PY22 and Employment Verification in PY23.

- **School Status at Entry (Youth)**: All WIOA Youth files scanned into eBridge must include either an In School Youth (ISY) or Out of School Youth (OSY) identifier. This status is determined upon participant eligibility and matches I-Trac records.

- **Secondary Education & Skills (Adult/DW/Youth/JOBS)**: all eligibility, enrollment, progress reports, and transcripts related to High School Diploma, GED, and ESL supported trainings. Documentation should support information recorded in the Secondary Education & Skills section found under the Services tab in I-Trac.

- **Selective Service (Adult/DW/Youth/):** Documentation showing Selective Service requirements are met, or a RWP waiver, if applicable. See the Selective Service Program Standard and FAQ – Information to Share With Participant and Guidance for Eligibility

- **Success Story (Adult/DW/Youth/JOBS)**: Any recorded participant success stories using approved RWP Success Story Template and related image (image should connect to either employment or for Youth education attainment or employment).

- **TANF Step (JOBS only):** Any record related to a participant's TANF Step paperwork (including time sheets)

- **Training, Post-Secondary Ed. Documentation (Adult/DW/JOBS)**: Any documentation used to review, award, deny, administer, and monitor a Post-Secondary Education and Employment Skills Training (Entrepreneurial Training, Occupational Skills Training, Pre-Apprenticeship, Incumbent Worker, and Workforce Preparation). Documentation should support information recorded in the Post-secondary Education section found under the Services tab in I-Trac including scholarship applications, supported documents, agreements, and transcripts.

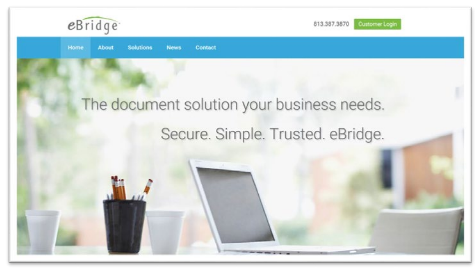
- **Training, Post-Secondary Ed. Documentation (Youth)**: Any documentation used to review, award, deny, administer, and monitor a Post-Secondary Education and Employment Skills Training (Entrepreneurial Training, Occupational Skills Training, Pre-Apprenticeship, and Skills Training – No Certification). Documentation should support information recorded in the Post-secondary Education section found under the Services tab in I-Trac including scholarship applications and supported documents, agreements, and transcripts.

- **Work Based Training (Adult/DW/Youth/JOBS)**: Any documentation used to review, award, deny, administer, and monitor a Work Based Training (such as Internship, On-the-Job Training, Registered Apprenticeship, and Work Experience). Documentation should support information recorded in the Work Based Training section in the I-Trac Services tab.

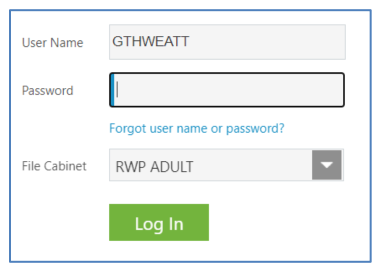
Using eBridge

Username and Login

eBridge, Inc. provides a web-based document imaging service that allows users to scan, index, retrieve and maintain their electronic file cabinets from an Internet connection. To access eBridge, visit www.eBridge.com.



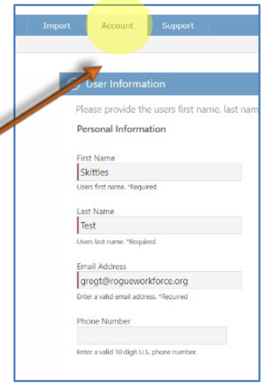
RWP purchased two electronic "filing cabinets" to hold participant records. RWP cabinets do not communicate with one another and any user who works in Adult and Youth programming will need two separate login accounts. In order to login to eBridge you will need a **User Name**, **Password**, and **File Cabinet** name.



All RWP subrecipient staff will receive a username (first initial, last name) and a temporary password that will require changing upon the first login. The cabinet name used to login will depend on your agency.

Contract	Filing Cabinet Name
WIOA Youth Providers	RWP YOUTH
WIOA Adult/DW Providers and TANF/JOBS	RWP ADULT

After entering your credentials, you will be prompted to receive a <u>one-time code</u>, either by email or text. This is a Two-Factor Authentication tied to your email and phone number entered. To add or change your email and phone number, click the **Account** tab.



The Phone Number is <u>optional</u> and needs to be a cell phone that can receive a text message.

Permissions

Each eBridge user will only be able to view files within their own agency records. Subrecipient managers who would like to add additional restrictions will need to contact RWP for further assistance. If a user accidentally sent a record into an external agency's filing system, please contact RWP for assistance.

Scanning, Print Drive, Drag and Drop

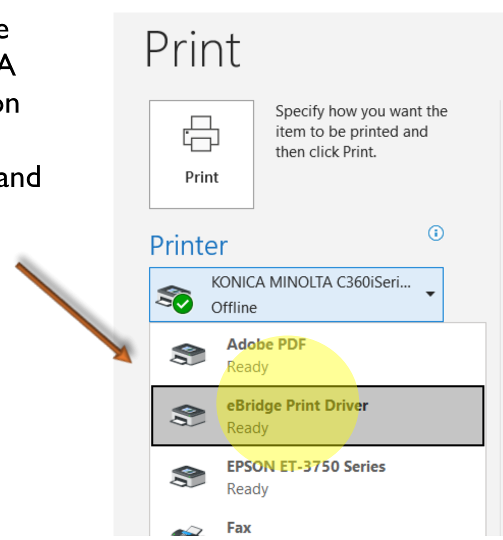
Documents can be entered into eBridge three ways; **Scan**, **Direct Print**, and/or **Drag and Drop**.

Scanning: eBridge has certified and non-certified scanners that communicate with eBridge. You can confirm if your scanner is certified by eBridge here. If you have a certified scanner, all you need to do is login to eBridge and click the **Scan** tab at the top and follow the prompts. For more technical assistance regarding scanning, please click here.

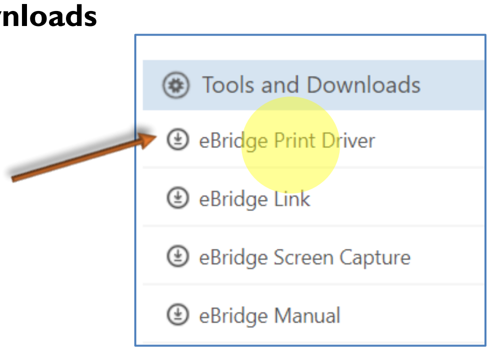
Note: When Scanning documents, make sure to **view each page** and assure files are not sideways or upside down **BEFORE** saving. To correct the direction, use the Rotate function.

If you do not own a certified scanner, you will need to install a scanner using the manufacture's process and designate an area where your document will scan to (all scanners need to be TWAIN compatible regardless of whether they are certified or not). Once that document scans, you will need to follow the "**drag and drop**" feature outlined below. Please note, this system is compatible with batch scanning where you scan multiple documents to create one single file.

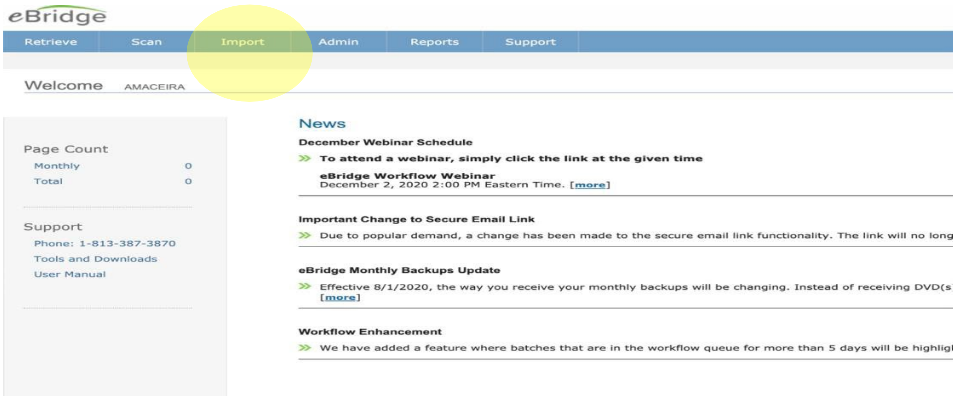
Direct Printer / Print Drive: All RWP contractors are asked to install the eBridge print driver on their WIOA computers or laptops. Once a print drive is installed on your device, you can print any files directly to eBridge using your normal printer functions. Just click "print" and locate the **eBridge Print Driver** file on your list of devices.



To download the eBridge print driver, click on the **Support** tab and look for the link under **Tools and Downloads**

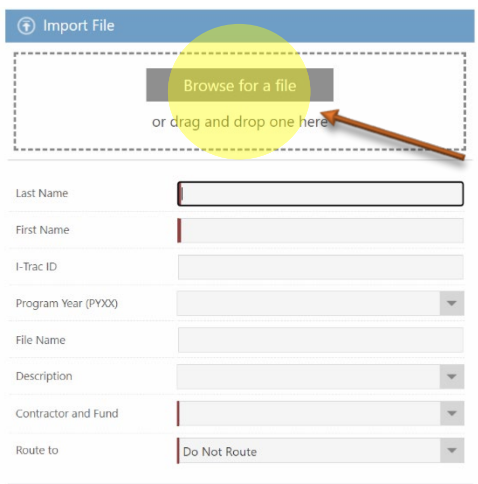


★ ***Drag and Drop***: You can save a file to a storage location (such as to your computer's hard drive or Sharepoint) then directly load a file into eBridge by logging in and clicking the **Import** tab at the top.

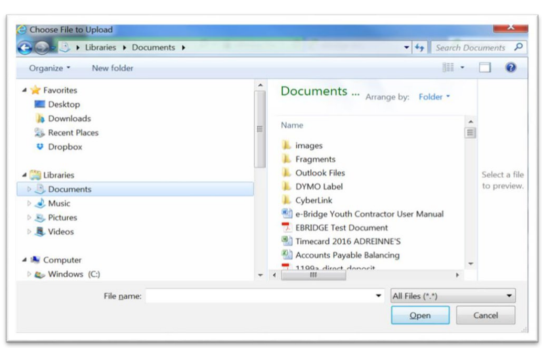


This will allow you to <u>browse for a file</u> on your computer and import it into the eBridge.

WIOA JOBS



TANF: Case Note



After you find the location of your document, you will need to double click the file or click **Open** at the bottom of the prompt.

Once you import the file, you will see the name of the file instead of the "Browse for a File" prompt. Files uploaded via File Import are saved to eBridge in their native format. For example, **Word** documents are saved with a **.docx** file extension, **Excel** documents are saved with an **.xlsx** file extension and **PDF** files are saved with a **.pdf** file extension. Imported files must include a file extension (i.e., .TIF, .DOCX, .XLSX) or you will receive an error "The file doesn't have a valid extension."

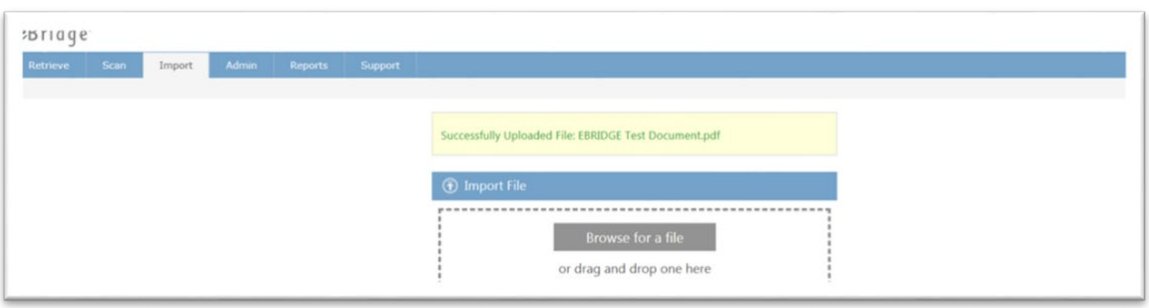
After your file appears, you will need to fill in each field, which are also called an "Index". ***All files are required to be indexed with every field.***

The fields that include **Last Name**, **First Name**, and **I-Trac ID** will need information to be manually entered. All other fields use a drop-down menu option.

The **File Name** should describe what the file is for, use Appendix C for required naming conventions

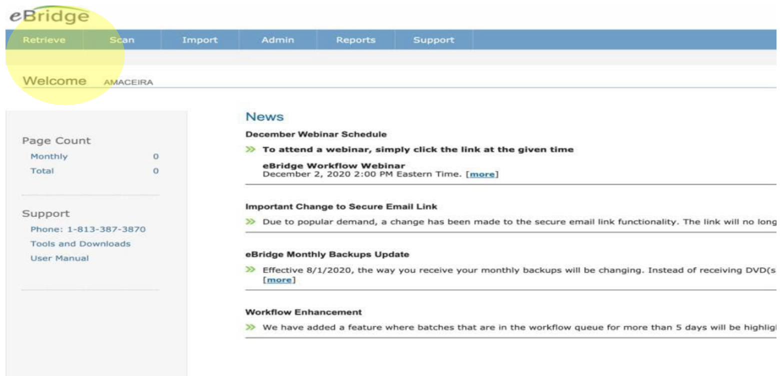
The **Description** Dropdown list will be different for each "Cabinet" and in alphabetical order by category. For the description of each dropdown list of categories and examples of documents to store in each, please refer to the **Definition** sections at the end of the manual.

After completing all fields, click **Import** to upload the document. You will receive a message to indicate the document was successfully uploaded.



Retrieving a Document

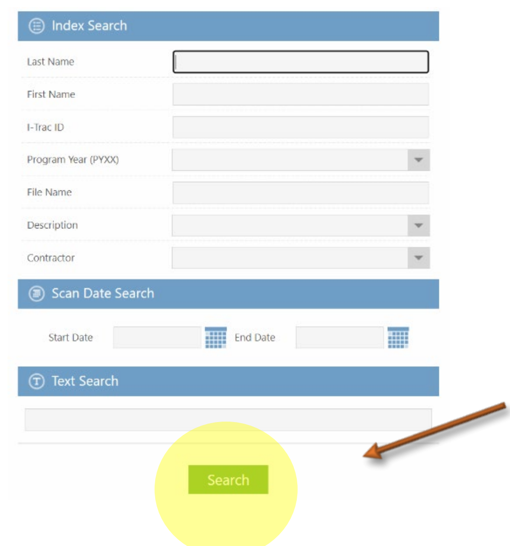
Each user can see any file indexed under their permissions setting. If a sub-recipient manager would like to add additional restrictions, please contact RWP for assistance. Remember that the **RWP Adult** and **RWP Youth** filing cabinets are separate accounts. To retrieve a document, click the **Retrieve** tab at the top of the home page.



The eBridge Retrieve function allows you to locate files by using different search inquiries.

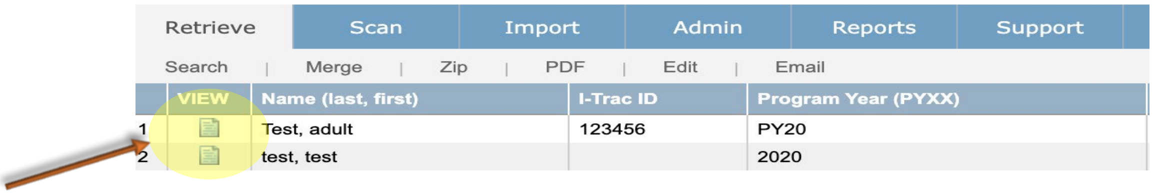
- If you are looking for documents that pertain to **one job seeker**, you could search by the <u>Name</u> fields or the <u>I-Trac ID</u>.
- If you are looking for **all** job seekers, leave all fields <u>blank</u> and click the **Search** button
- There is also a text search where you can enter a specific word that will allow results to appear after you click **Search**.

WIOA JOBS



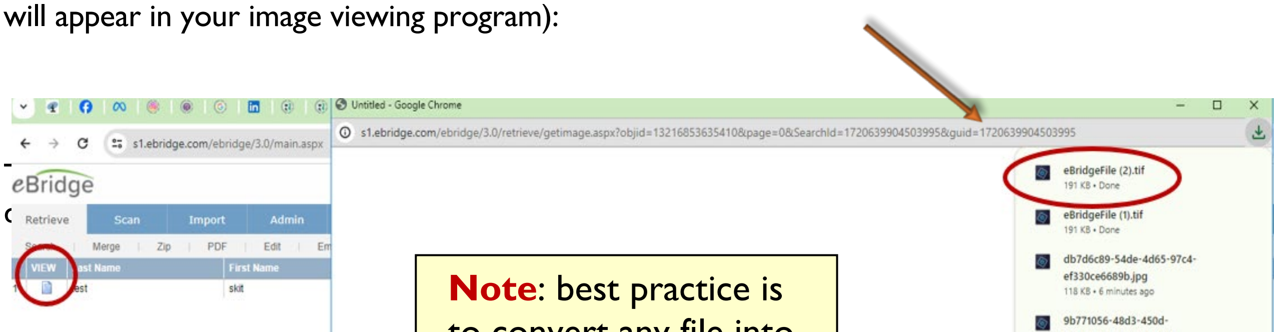
After clicking **Search**, document(s) with the same labels used in the search fields will appear. To sort the documents, click the column heading (Last Name, First Name, I-Trac ID, Description, etc.) once to sort using a descending order or twice to sort using an ascending order.

To view the item, single-click on the Document Icon in the View column or Double-click the row where the document is located.



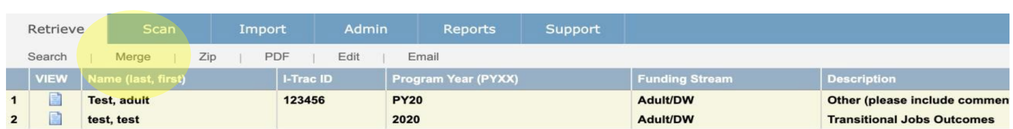
The document will appear in a different window (like a pop-up) called the **eBridge Web Viewer.** In this function, you can redact information, highlight, add comments, or print. Directions for using the eBridge Web Viewer starting on page 14 of this manual.

<u>If possible, convert the file into a PDF</u>. If you do not, the file can be retrieved, though it will look differently in the View window. In the image below, after clicking the **View** button the file name will appear in the upper right-hand corner, you will need to view it in the "native" program (e.g. an image will appear in your image viewing program):



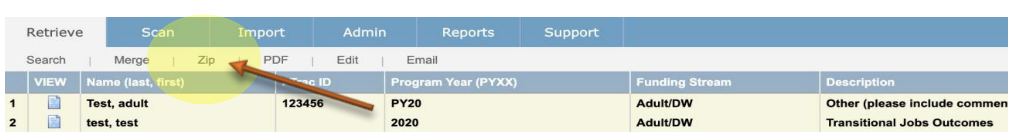
Note: best practice is to convert any file into a **PDF** <u>before</u> uploading

Merge:



If you highlight two or more Tiff or PDF files (Single-Click on the row) and click **Merge**, you will be able to open the selected document batches in one window for viewing and printing purposes. Make sure the documents you want to merge are yellow before clicking Merge.

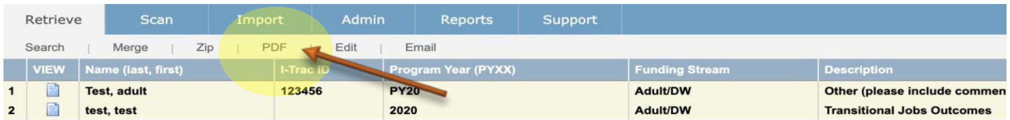
Zip:



The Zip option allows you to save batches of documents to the hard drive of your computer. Highlight one or more batches then click **Zip** followed by **Save**. Select the location on your PC you want to save the batches. This saves the batches as a compressed zip file. Each batch will be accessible independently once unzipped.

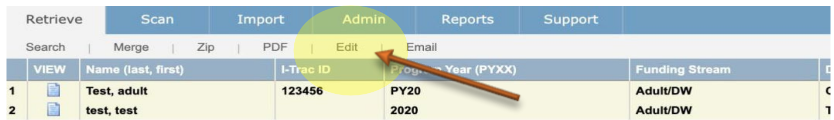
WIOA Adult/DW/DWG/Youth and Discretionary Funds EBRIDGE ELECTRONIC FILE MANUAL

PDF:



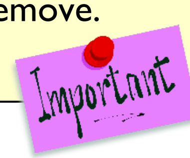
If you highlight a **Tiff** batch of documents and click **PDF**, the batch will open with the eBridge PDF Viewer or Adobe Acrobat Reader in a PDF format. From this format you can also save the file to the computer's hard drive and attach it to an email. Other files for images (JPG and PNG) or Excel (xlsx) will not convert using the PDF function.

Deleting and Editing:

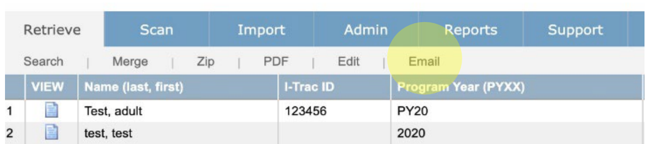


Only designated staff will have the ability to delete participant files. **Edit** allows you to modify the index values for one or more batches at the same time or delete the batch(es). To delete files, click **Edit** and then click **Delete** and verify the number of document(s) to be deleted. Directions for Editing Participant Files in the **Editing an Uploaded File** below.

> **Note**: if a file needs deleting, contact a Manager who will ask RWP to remove.

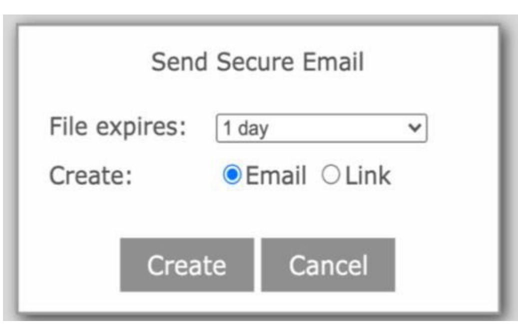


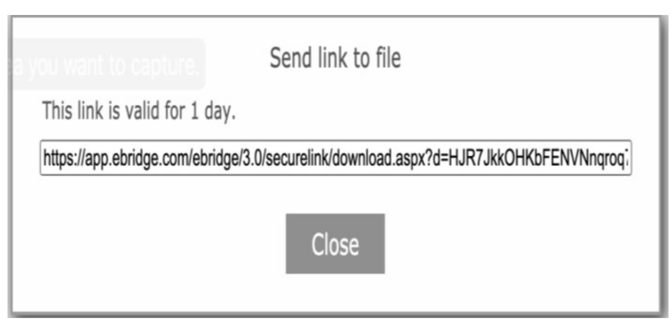
★ *Email:*



To send a document via a secure email, select the file to be sent and click **Email**. You will immediately see a pop-up window that allows you to choose if you want to email the document directly or receive a secure link to copy and paste into an email.

Ebridge allows you to set the timeframe of how long a secure link is valid for. RWP requests that link expirations are within 5 days from the day the link is sent.

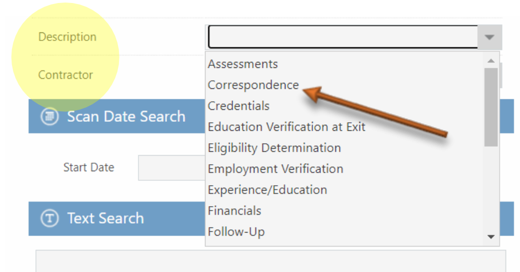




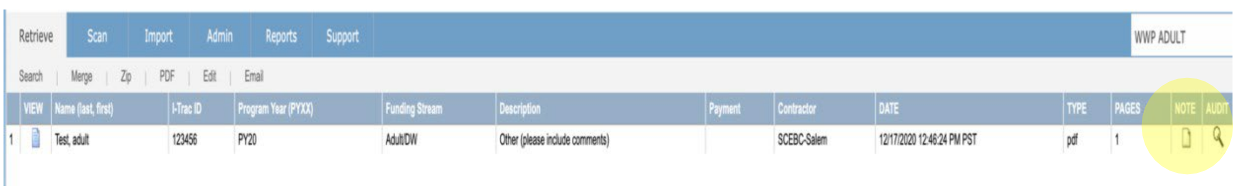
Commenting on a Document

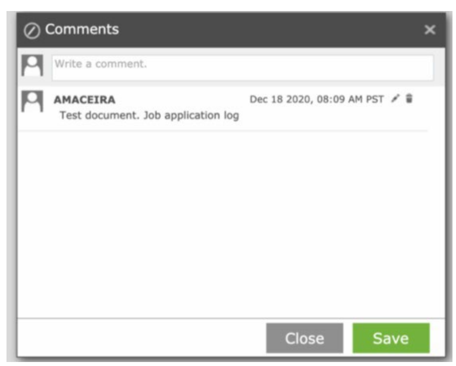
Commenting on a document will need to occur when:

1. a document is being **edited**,
2. parts of a document are **redacted** (content blocked out from view), or
3. when a document is labeled as "**Correspondence**" in the description field. When using the "Correspondence" option for importing a file, the comment must <u>describe the subject</u> of the scanned document.



Adding a comment to an imported document starts with first locating the file using the Retrieval instructions outlined above. Once you locate the file, you will need to click the **Note** icon and add the comment to the popup comment box.

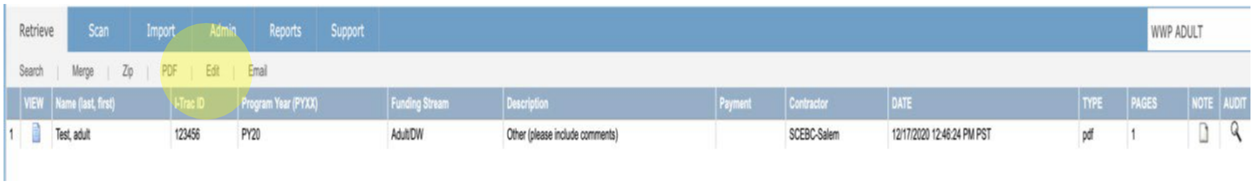




To edit or delete comments, click either the pencil icon to edit or trash bin to delete. If you would like to add a comment while using the eBridge **Web Viewer** that starts on page 16 for instructions.

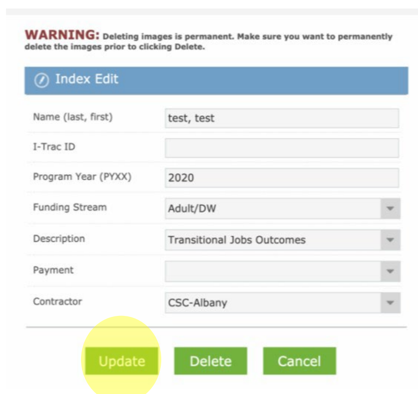
Editing an Uploaded File

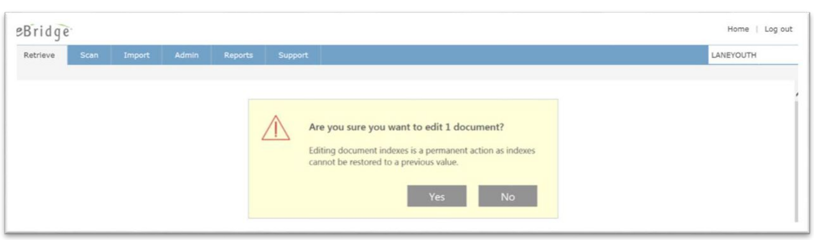
Editing allows you to modify the index values for one or more document batches at the same



time. To edit files, highlight the files you would like to edit and click **Edit**.

This will redirect you to another window where the file(s) you clicked will automatically appear in the dropdown field. To edit, just change the information in the fields and click **Update** then in the confirmation window, click **Yes**.

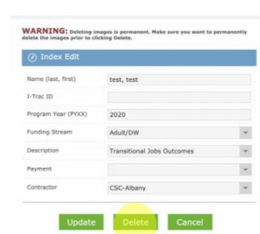




Please remember, editing document indexes is a permanent action as index values cannot be resorted to previous values. The last step is to confirm that you want to edit the document.

Deleting a Document (only Administrators have access)

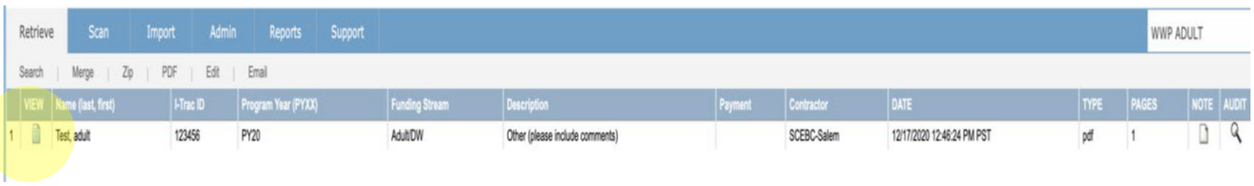
<u>To delete a document, you will need to contact your Manager. Only RWP Administrators have the ability to delete files.</u> If you have permissions to delete a file, use the same steps as outlined in the edit feature, click the Delete button, and follow the prompts that confirm you want to delete the document.



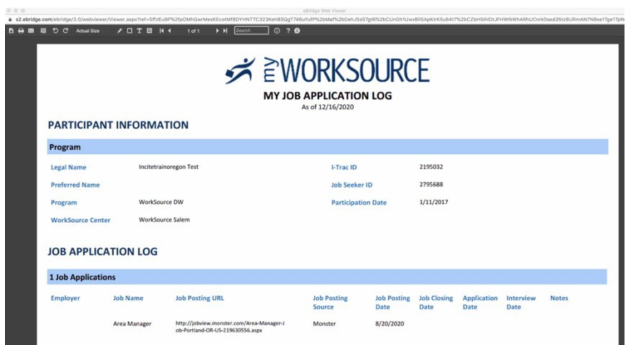
Using the eBridge Web Viewer

Using the eBridge Viewer Tools

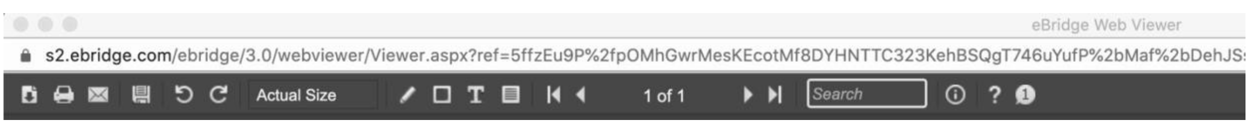
You can access the eBridge Web Viewer by clicking the **View** icon in the Retrieval section of eBridge.



The eBridge Web Viewer runs in your web browser. It is compatible with Google Chrome, and Microsoft Edge, as well as mobile browsers.



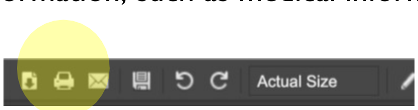
At the top of the eBridge Viewer Toolbar there are multiple icons that allow you to do different functions within the viewer. The following is an overview of each function.



Download:

The **Download** tool allows you to save the document (original or flattened) to a location on your local computer. *Please note*, flattening the file will hard code onto the downloaded file any annotations that were added to it after it was uploaded. This feature will need to be used when redacting information, such as medical information, etc. from the document.

Print:

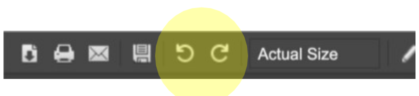


The **Print** feature allows you to print the document. The Print function defaults to "current page". If you wish to print a page range, click **Pages** and enter the page range to be printed. If you wish to print all pages, click **All Pages**. Once you have made your selection, the PC's printer dialog will pop up. Click **Print** again (no need to select pages again). *Please note*, if the file is larger than 20 pages and you click **All Pages** you will be prompted to download the file prior to printing.

Email:

The **Email** tool allows you to send a secure link to the document in an email and set it to expire after an allotted amount of time. You can create an email message, which requires local email or a link that can be pasted into a web-based email message. The file can be sent flattened to prevent any redactions or annotations from being removed by the recipient. The email defaults to **All Pages** but the option to send the "Current Page" or a specific page range are available. The file will be available to be downloaded until the allotted time expires.

Rotate:



Rotates the current page left or right.

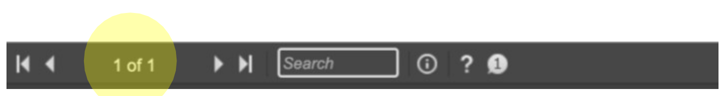
Save:

This tool allows you to **Save** changes (annotations, white-out, drawings) back to eBridge.

Zoom Tool:

Zoom allows you to fit the page to the viewer by height, width, or the actual size of the document.

Navigation Buttons:

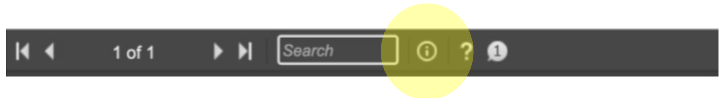


This tool allows you to browse the pages of a batch one by one, jump to the beginning or end of the batch, or type a page number to navigate directly to that page.

Search Box:

Search allows you to find typed text within the document. If your text is found, it will be highlighted in yellow on the document. Press the **Enter** key to find the next instance of the text on the document (if applicable). At the bottom right of the web page, it will tell you the number of results that were found.

Document Properties:



This tool allows you to display the document properties.

Help:

This tool allows you to access **Help** resources for the Viewer Application.

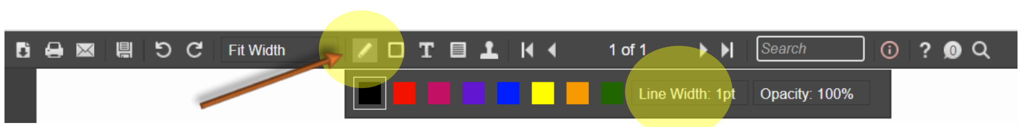
Document Comments:

This tool allows you to display any document comments. Comments can be added to the document from here as well.

Editing via the eBridge Viewer Tools

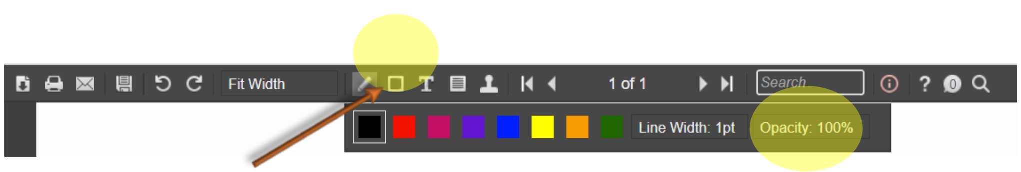
eBridge Viewer allows temporary changes to the scanned PDF document that can be saved back to eBridge. Uploading changes to PDF files are not permanent and can be altered or deleted later. To edit a document, click the **Retrieve** tab and then the **View** icon. Once the file is open you will see a new tool bar, there are multiple icons that allow you to do different functions to the document.

Draw Tool:



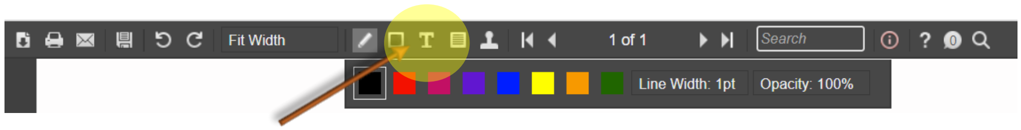
This tool allows you to highlight, circle, underline, and make notes on the document. The document can then be printed, emailed, or saved to your computer using the **Download** Icon. Drawings can be moved to other parts of the document by single-clicking them and dragging them to a new location. (A square box will appear around the drawing when you Single-Click on it.) To adjust the **Drawing Properties**, click the **Drawing Tool** icon to display the options. The **Drawing Properties** will allow you to change the thickness (Line Width), color, and opacity of the line. Click Line Width or Opacity to display the dropdown lists.

White Out:



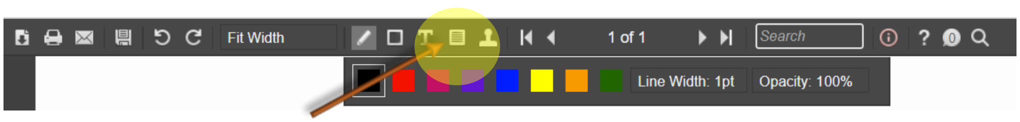
The **White Out** tool allows you to drag your mouse over an area you want to redact, or block from view. This can be used if you are going to fax or e-mail the document to someone and want to block out sensitive information. The white box that appears can be relocated to a different part of the file by clicking and dragging it elsewhere. The box size can be adjusted by clicking and holding the edge or corner and dragging to the desired size. The color is changed by clicking the color of your choice and the width of the box and opacity can be customized through using the options found when you click the opacity button. To delete any white-outs, simply right-click the box and select delete.

Text:



The **Text** option allows you to type anywhere on the document. Click the Text icon and then click where you would like to start typing. The text can be copied and pasted elsewhere (Word, Email, etc.).

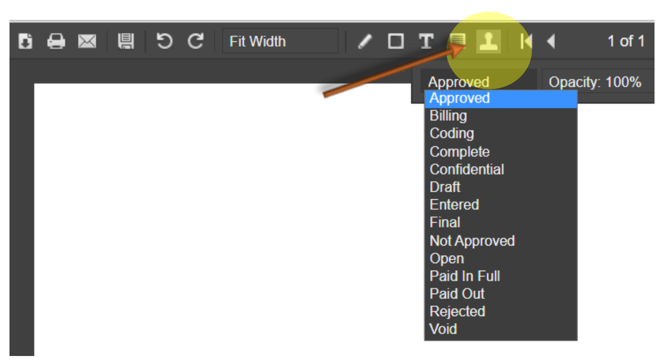
Note:



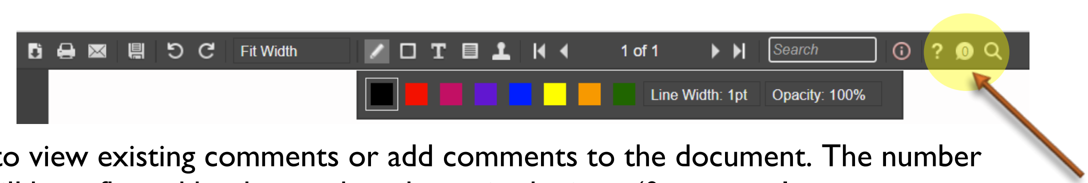
The **Note** tool allows you to insert a note directly onto the file. A box will appear like a Post-It note that you can type into. You can relocate the box to a different part of the document by clicking and dragging it elsewhere on the page. The Popup Note window size can be adjusted by clicking one of the bottom corners and holding while dragging the corner to the desired size.

Stamp:

The **Stamp** icon allows you to quickly embed a pre-defined descriptor, such as "Approved" or "Not Approved". To add a **Stamp**, click the icon and then click on the first descriptor name on the dropdown list. Choose a stamp and then click on the document where you would like the stamp to reside.



Comments:



Click this icon to view existing comments or add comments to the document. The number of comments will be reflected by the number shown in the icon (0 = none, 1 = one comment). These comments are viewable from the **Retrieve Results** (<u>Note</u> column) also.

Multiple Funds – How to Manage

In the event a participant enrolls in more than one fund (such as Adult and DW or DWG or state funded grant), staff may use existing uploaded documentation for **Registration** and **Employment Confirmation** purposes.

- **Documents that only need to be uploaded once**:
  Some documents may be uploaded only once into eBridge, such as paperwork from the first fund that has not changed. This includes some **Eligibility Paperwork** (e.g. Birth Date confirmation, Legal to Work confirmation, or Veteran Status). If already uploaded into the first fund it does not need to be uploaded into the second fund **HOWEVER** a case note in the second fund must be entered explaining where the documentation is located.

  Example 1: A participant is enrolled in the Adult fund and a month later enrolled in the P10K fund. The participant provided a Photo ID (uploaded) as proof of age in Adult fund. The P10K does not need to have these documents uploaded, however, a case note is created stating that a Photo ID was uploaded into the Adult fund at the time of Adult enrollment.

- **Documents that require uploading into both funds:**

  Any paperwork that is specific to the second fund (such as an Application, EDR, Case Note Report and PPR) or has changed since the prior fund application (e.g. Receiving Public Assistance), and any Outcome.

  Example 2: for the participant in the first example above, the Adult fund Application would be uploaded into the eBridge in the Adult fund, later the P10K Application would be uploaded into the eBridge in the P10K fund.

- **Training and Fund-Specific Documents:**

  Any service in which dollars are spent on behalf of the participant that are solely supported by a fund, should be uploaded only to that specific fund (e.g. Support Service, GED, and Training payments).

  Example 3: the participant in Example 1 receives funding for an OST from just the Adult fund. All financial and training documents are to be uploaded into the P10K fund only. Any Outcome will need to be uploaded into both the Adult and P10K fund.

  If funding is used for a Service by more than one fund (Braiding), then any related document must be uploaded into both funds ("follow the money", if dollars are spent, eBridge should reflect any related documents used from that fund).

  Example 4: the participant above had a Support Service split between both the Adult and P10K funds, any related financial documents would be loaded into both funds.

Employment Confirmation

Employment Confirmation documentation may also be done the same way, with an I-Trac Case Note explaining which fund the document was uploaded in.

All other documents for the new fund will need to upload to that fund.

What if a participant uses two funds to pay for a Training (Braiding)?

Use the first fund created for the upload (including, but not limited to: training paperwork, Support Service Documents, or Credentials) WITH an I-Trac Case Note naming the **document** and **fund** uploaded to.

Participant Moves From One County to Another – How to Manage

In the event a participant relocates from one county Work Center to another (Medford to Grants Pass or the reverse), do the following:

1. The Provider emails an I-Trac # and initials to RWP staff advising of the new location
   a. The Initial Career Coach handing over the participant needs to enter a Case Note explaining the Work Center change and the new Career Coach managing the participant
2. RWP staff will mass edit all files in eBridge to reflect the new location
3. All future uploads would reflect the new location
4. RWP staff will also change the location in I-Trac to reflect on the new location

Additional Assistance

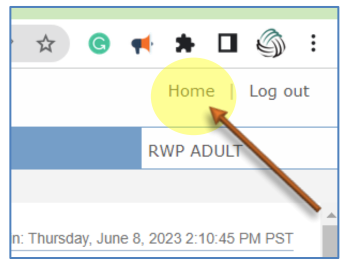
A. Password Assistance

If you need password assistance, such as resetting your password, please contact RWP directly to receive a temporary password. The first time you login to eBridge, you will need to change your password immediately.

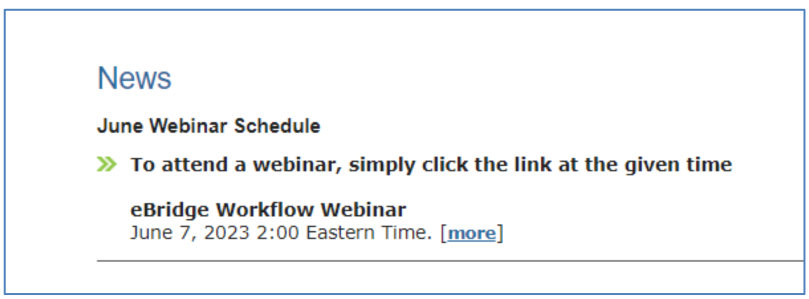
B. Technical Assistance

For any technical assistance, including using the eBridge printer and scanner, please contact a Manager or RWP. There is also a support feature in eBridge which is found under the **Support** tab, located here are FAQs, written manuals, and training videos.

In addition to the information found under the **Support** page, eBridge offers webinars to all users. To locate available webinars, click the **Home** link at the top of the page.



All available webinar times, subjects, and links are found under the **News** section.



Appendix A. Descriptions Dropdown List by Provider:

List Items

- Assessments
- Basic Skills Deficient
- Correspondence
- Credentials
- Eligibility
- Employer Verification
- Financials
- Follow-Up
- Goals and Plans
- Non-DOL Credentials
- Priority of Service
- Secondary Education & Skills
- Selective Service
- Success Story
- TANF Timesheets (JOBS only)
- Training, Post-Secondary Ed. Documentation
- Work Authorization (Legal to Work)
- Work Based Training Documentation

Appendix B. Descriptions Categories (A-Z) and Related Documents

Definition Category	Document
Assessments	• Basic Skills Deficient Assessment • Career Aptitude Assessment Result • Career One Stop Assessment • CASAS Pretest or Posttest • CIS Assessments • Employability Skills Rubric • E-Skills Results • National Career Readiness Certificate (NCRC) • Resume • Rogue Workforce Partnership Basic Skills Screening Tool • School Individual Education Plan (IEP) or 504 • Transcript (GPA) • Welcome Survey (JOBS/TANF Career Compass)
Correspondence	• Correspondence to/from or on behalf of participant not in a case note • Correspondence with Training Vendor
Credentials	• Associate's degree • Bachelor's degree • Commercial Driver's License (CDL) Permit (received during training) • Credential • GED Completion • High School (HS) Diploma •
Education Verification at Exit	• GED or High School Diploma or transcript
Eligibility	• Eligibility Packet - SO YOUTH WORKS • Eligibility Packet – WSRV • Eligibility Packet- Pathways (RWP only) • Eligibility Packet- ARPA P10K (RWP only) • **NO** SSN card in file, document "Social Security Card – Notification of Viewing" in case notes
Employment Verification	• Employment Leave and Earnings Statements • Employment Verification Letter on Letterhead • Follow-up Survey • Income Tax Records • Pay Stub • Payroll Slip • Quarterly Tax Payments • Sales Commission Worksheet • Self-employment Worksheet Signed • State Department of Revenue or Taxation Record • W-2 (IRS form reporting annual wages)

Finance (must match I-Trac Services and Case-Notes and Smartsheets)	• BBSI Referral • Decision Matrix • Follow-Up Service Payment • Invoice Authorization with Backup (Vendor Name) • OJT Reimbursement Document • Stipend Documentation Showing Participant Received Payment • Voucher (vendor, e.g. RCC) • Training Vendor Price Sheet •
Follow Up	• Follow-Up Services that included a Payment Document • Follow-up Survey • I-Trac Program Participation Report (PPR) on Exit •
Goals/Plans	• IEP * If an updated ISS is created, upload and include date in the title • ISS * If an updated ISS is created, upload and include date in the title • Prosperity Planner * If an updated plan is created, upload and include date in the title • WorkSource Career Plan
Incentive Activity Agreement	• Incentive Received by Participant
Non-DOL Credentials	• Cardio-Pulmonary Resuscitation (CPR) verification of successful completion • Food Handlers Card • Launch Pad Certificate • LinkedIn Learning Certificate • Workshop completed with a certificate
Priority of Service	• Basic Skills Deficient (use Assessment Document) • Public Assistance Document • Public Assistance Benefits Letter • Public Assistance Check Copy • Public Assistance Medical Card • Email referral from agency (e.g. Oregon Department of Human Services - ODHS)" • Veteran Priority of Service Document Proof of Military Service (DD-214) OR Certification of Military Service
Secondary Education & Skills	• Computer Loan Agreement (GED/HS usage) • High School, General Educational Development (GED), or English as Second Language (ESL) Enrollment Confirmation
Selective Service	• DD-214 Military Separation Record • Immigrant/Non-Immigrant Visa • Records of Incarceration / Hospitalization / Institutionalization between the age of 18-26 • Selective Service Online Letter • Selective Service Registration Card • Stamped Post Office Receipt of Registration

	• If Applicant was not aware to register and is older than 26:
	  ◦ Participant Request for Selective Service Exemption
	  ◦ Copy of **Status Letter** sent to the Selective Service as approved by a WSRV Manager (the Participant is not required to provide correspondence from the Selective Service, if provided then add)

Success Story	• Approved Success Story Template Completed • Work Related Image (PNG or JPG only)
TANF Timesheets	• ED Timesheet (date) • JO Timesheet (date) • JO (Non DHS475) Timesheet (date) • JS Timesheet (date) • PL Timesheet (date) • ED Timesheet Supervised (date) • SW Timesheet (date) • WE Timesheet (date)
Training, Post-Secondary Ed. Documentation	• Course Completion Document • Department of Motor Vehicles Report (from DMV) • Department of Motor Vehicles Survey (internal report) • Letter of Intent to Hire • Scholarship Application & Supporting Documents • Training for Unemployment Insurance (TUI) Application Signed • Training for Unemployment Insurance (TUI) Approval (Email – though not necessary, it is preferred as best practice) • Training Vendor Information/Reports • Transcripts from Training Vendor (including prior to completion and at completion)
Work Authorization (Legal to Work)	• Birth Certificate • Other Legal to Work Document (not Birth Certificate, Passport, or Photo ID) • Passports • Photo Identification (ID) • For complete list of Acceptable I-9
Work Based Training Documentation	• Internship Handbook Signature Page • Internship/Work Experience Placement Agreement Signed – Participant and Employer • Job Listing or Job Description • On-the-Job Training (OJT)Participant and Employer Agreement Signed • Wage/Time Sheet Verification • WEX Application • Work Experience (WEX) Time Sheets matching Financials

Appendix C. Documents (A-Z) With Fund Description Category

Document	File Name to Enter	Fund	Description Category
Associate degree	Associate degree	Adult/DW/Youth/WorkEx/OYEP HECC	Credentials
Bachelor's degree	Bachelor's degree	Adult/DW/Youth/WorkEx/OYEP HECC	Credentials
Barrett Business Services Inc. (BBSI) Referral	BBSI Referral	Adult/DW/Youth/WorkEx/OYEP HECC	Financial
Basic Skills Deficient	Use related Assessment Document	Adult/DW/WorkEx/ Prosperity 10K	Assessment
Behavior/Incident Form	Behavior/Incident Form	Youth, OYEP-HECC, ARPA-Prosperity 10K	Correspondence
Birth Certificate	Birth Certificate	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Work Authorization (Legal to Work)
Cardio-Pulmonary Resuscitation (CPR) verification of successful completion	CPR	Adult/DW/Youth/ WorkEx/OYEP HECC	Non-DOL Credentials
Career Aptitude Assessment Result	Career Aptitude Assessment Result	Adult/DW/Youth/WorkEx/OYEP HECC	Assessments
Career One Stop Assessment	Career One Stop Assessment	Adult/DW/Youth/WorkEx/OYEP HECC	Assessments
Certification of Military Service (in lieu of DD-214)	Certification of Military Service	Adult/DW	Selective Service and Priority of Service
CIS Assessment	CIS Assessment	Adult/DW/Youth/WorkEx/OYEP HECC	Assessments
Commercial Driver's License (CDL) Permit (received during training)	CDL Permit	Adult/DW/Youth/WorkEx/OYEP HECC	Credentials
Community Success Matrix	Community Success Matrix	Pathways	Assessments
Comprehensive Adult Student Assessment Systems (CASAS), Pre- and Post- tests)	CASAS Pretest or Posttest	Youth, OYEP-HECC, ARPA-Prosperity 10K	Assessments
Computer Loan Agreement (GED/HS usage)	Computer Loan Agreement	Youth, OYEP-HECC, ARPA-Prosperity 10K	Secondary Education & Skills
Correspondence to/from or on behalf of participant	Correspondence (Brief explanation of)	Adult/DW/Youth/WorkEx/OYEP HECC	Correspondence
Correspondence with Training Vendor	Correspondence (Brief explanation of)	Adult/DW/Youth/WorkEx/OYEP HECC	Correspondence

Course Completion Document (a document that shows a participant completed a course of training)	Course Completion (Training Provider Name)	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Training, Post-Secondary Ed. Documentation
Credential (an industry-recognized certificate or certification, a certificate of completion of an apprenticeship, a license recognized by the state or federal government, or an Associate or Bachelor's degree)	Name of the credential as it appears on the certificate	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Credentials
DD-214 Military Separation Record	DD-214	Adult/DW/Youth	Selective Service
Decision Matrix	Decision Matrix	Adult/DW/WorkEx/ Prosperity 10K	Financial
Department of Motor Vehicles Report (from DMV)	DMV Report	Adult/DW/Youth/WorkEx/OYEP HECC	Training, Post-Secondary Ed. Documentation
Department of Motor Vehicles Survey (internal report)	DMV Survey	Adult/DW/Youth/WorkEx/OYEP HECC	Training, Post-Secondary Ed. Documentation
Document Showing Incentive was Received by Participant	Incentive Received by Participant	Youth, OYEP-HECC, ARPA-Prosperity 10K	Incentive Activity Agreement
Eligibility Packet - ARPA P10K (Release of Information, Photo and Story Release Form, I-Trac Application if not uploaded into I-Trac)	Eligibility Packet - ARPA P10K	ARPA P10K	Eligibility
Eligibility Packet - SO YOUTH WORKS (Release of Information, Photo and Story Release Form, I-Trac Application if not uploaded into I-Trac)	Eligibility Packet - SO YOUTH WORKS	Youth, OYEP-HECC, Prosperity 10K	Eligibility
Eligibility Packet - WSRV (Release of Information, Photo and Story Release Form, I-Trac Application if not uploaded into I-Trac)	Eligibility Packet - WSRV	Adult/DW/WorkEx/ Prosperity 10K	Eligibility

Eligibility Packet-Pathways (Release of Information, Photo and Story Release Form, I-Trac Application if not uploaded into I-Trac)	Eligibility Packet- Pathways	Pathways	Eligibility
Employability Skills Rubric	Employability Skills Rubric	Adult/DW/Youth/WorkEx/OYEP HECC	Assessments
Employment Leave and Earnings Statements	Employment Leave and Earnings Statements	Adult/DW/Youth/WorkEx/OYEP HECC	Employment Verification
Employment Verification Letter on Letterhead	Employment Verification Letter	Adult/DW/Youth/WorkEx/OYEP HECC	Employment Verification
ESkills Results	ESkills Results	Adult/DW/Youth/WorkEx/OYEP HECC	Assessments
Essential Skills Transcript from school	Essential Skills Transcript	Youth, OYEP-HECC, ARPA-Prosperity 10K	Assessments
Follow Up Survey (in any form)	Follow Up Survey	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Follow-Up
Follow-Up Services that included a Payment Document	Follow-Up Service Payment	Youth, OYEP-HECC, ARPA-Prosperity 10K	Financial
Follow-Up Services that included Payment Document	Follow-Up Services Payment - Vendor or Participant Name	Youth	Follow-Up
Follow-up Survey (Signed)	Follow-up Survey	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Employment Verification
Food Handlers Card	Food Handlers Card	Adult/DW/Youth/WorkEx/OYEP HECC	Non-DOL Credentials
General Educational Development (GED) Course Work and any of the four required Exams: Math, Language Arts, Science, and Social Studies. Copies of test results prior to completion	GED or High School Diploma or transcript	Youth, OYEP-HECC, ARPA-Prosperity 10K	Education Verification at Exit
General Educational Development (GED) or High School Equivalency Diploma	GED or HS Equivalency Diploma	Adult/DW/Youth/WorkEx/OYEP HECC	Credentials
High School, General Educational Development (GED), or English as Second	High School, GED, or ESL Enrollment Confirmation	Adult/DW/Youth/WorkEx/OYEP HECC	Secondary Education & Skills

Language (ESL) Enrollment Confirmation			
Immigrant/Non-Immigrant Visa	Immigrant/Non-Immigrant Visa	Adult/DW/Youth	Selective Service
Income Tax Records	Income Tax Records	Adult/DW/Youth/WorkEx/OYEP HECC	Employment Verification
Individual Employment Plan (IEP) – Signed	IEP * If an updated ISS is created, upload and include date in the title	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Goals/Plans
Individual Service Strategy (ISS) – Signed	ISS * If an updated ISS is created, upload and include date in the title	Youth, OYEP-HECC, ARPA-Prosperity 10K	Goals/Plans
Internship Handbook Signature Page	Internship Handbook Signature Page	Adult/DW/WorkEx/ Prosperity 10K	Work Based Training Documentation
Internship/Work Experience Placement Agreement Signed – Participant and Employer	Internship/Work Experience Placement Agreement	Adult/DW/Youth/WorkEx/OYEP HECC	Work Based Training Documentation
Invoice Authorization with Backup (Vendor Name)	Invoice Authorization with Backup (Vendor Name)	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Financial
I-Trac Program Participation Report (PPR) on Exit	I-Trac Program Participation Report	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Follow-Up
Job Listing or Job Description	Job Listing/Description	Adult/DW/Youth/WorkEx/OYEP HECC	Work Based Training Documentation
Launch Pad Certificate	Launch Pad Certificate	Adult/DW/Youth/WorkEx/OYEP HECC	Non-DOL Credentials
Letter of Intent to Hire	Letter of Intent to Hire	Adult/DW/Youth/WorkEx/OYEP HECC	Training, Post-Secondary Ed. Documentation
LinkedIn Learning Certificate	LinkedIn Learning Certificate (name of training)	Adult/DW/Youth/WorkEx/OYEP HECC	Non-DOL Credentials
National Career Readiness Certificate (NCRC)	NCRC	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Assessments
On-the-Job Training (OJT) Participant and Employer Agreement Signed	OJT Participant Agreement	Adult/DW/Youth/WorkEx/OYEP HECC	Work Based Training Documentation
On-the-Job Training (OJT) Reimbursement Document	OJT Reimbursement Document	Adult/DW/Youth/WorkEx/OYEP HECC	Financial

Other Legal to Work Document (not Birth Certificate, Passport, or Photo ID)	Other Legal to Work Document - describe	Adult/DW/Youth/WorkEx/OYEP HECC	Work Authorization (Legal to Work)
Passports	Passports	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Work Authorization (Legal to Work)
Pay Stub	Pay Stub	Adult/DW/Youth/WorkEx/OYEP HECC	Employment Verification
Payroll Slip	Payroll Slip	Adult/DW/Youth/WorkEx/OYEP HECC	Employment Verification
Photo Identification (ID)	Photo ID	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Work Authorization (Legal to Work)
Post Skills Training - Secondary Education Credential including Occupational Skills Training (OST) completion verification	Name of the credential as it appears on the certificate	Youth, OYEP-HECC, ARPA-Prosperity 10K	Education Verification at Exit
Prosperity Planner – My WorkSource	Prosperity Planner * If an updated plan is created, upload and include date in the title	Adult/DW/Youth/WorkEx/OYEP HECC	Goals/Plans
Public Assistance Document **- Public Assistance Benefits Letter** **- Public Assistance Check Copy** **- Public Assistance Medical Card** **- Email referral from agency (e.g. Oregon Department of Human Services - ODHS)**	Public Assistance Document	Adult/DW/Youth/WorkEx/OYEP HECC	Priority of Service
Qualifies for Special Education with a School	School Individual Education Plan (IEP) or 504	Youth, OYEP-HECC, ARPA-Prosperity 10K	Assessments

Individual Education Plan (IEP) or 504			
Quarterly Tax Payments	Quarterly Tax Payment	Adult/DW/Youth/WorkEx/OYEP HECC	Employment Verification
Resume	Resume	Adult/DW/Youth/WorkEx/OYEP HECC	Assessments
Rogue Workforce Partnership Basic Skills Screening Tool	Rogue Workforce Partnership Basic Skills Screening Tool	Adult/DW/Youth/WorkEx/OYEP HECC	Assessments
Sales Commission Worksheet	Sales Commission Worksheet	Adult/DW/Youth/WorkEx/OYEP HECC	Employment Verification
Scholarship Application & Supporting Documents	Scholarship Application	Adult/DW/Youth/WorkEx/OYEP HECC	Training, Post-Secondary Ed. Documentation
Selective Service Confirmation (online verification, letter, or card)	Selective Service Confirmation	Adult/DW/Youth	Selective Service
Selective Service Status Letter sent to the Selective Service as approved by a WSRV Manager (the Participant is not required to provide correspondence from the Selective Service, if provided then add)	Selective Service Status Letter	Adult/DW/WorkEx/Prosperity 10K	Selective Service
Self-employment Worksheet Signed	Self-employment Worksheet	Adult/DW/Youth/WorkEx/OYEP HECC	Employment Verification
Stamped Post Office Receipt of Registration	Stamped Post Office Receipt of Registration	Adult/DW/Youth	Selective Service
State Department of Revenue or Taxation Record	State Department of Revenue or Taxation Record	Adult/DW/Youth/WorkEx/OYEP HECC	Employment Verification
Status Letter sent to the Selective Service	Status Letter	Adult/DW/Youth	Selective Service
Stipend Documentation Showing Participant Received Payment	Stipend Documentation Showing Participant Received Payment	Adult/DW/Youth/WorkEx/OYEP HECC	Financial
Success Story Template Completed	Success Story	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Success Story
Third Party Payment Voucher (e.g. Rogue Community College - RCC)	Voucher (vendor, e.g. RCC)	Adult/DW/Youth/WorkEx/OYEP HECC	Financial

Trade Act Related Document	Trade Act Related Document (Description)	Adult/DW/Youth/WorkEx/OYEP HECC	Correspondence
Training for Unemployment Insurance (TUI) Application Signed	TUI Application	Adult/DW/WorkEx/ Prosperity 10K	Training, Post-Secondary Ed. Documentation
Training for Unemployment Insurance (TUI) Approval (Email – though not necessary, it is preferred as best practice)	TUI Approval	Adult/DW/WorkEx/ Prosperity 10K	Training, Post-Secondary Ed. Documentation
Training Vendor Information/Reports	Training Vendor Information/Reports	Adult/DW/Youth/WorkEx/OYEP HECC	Training, Post-Secondary Ed. Documentation
Training Vendor Price Sheet	Training Vendor Price Sheet	Adult/DW/Youth/WorkEx/OYEP HECC	Financial
Transcript of educational institution showing Grade Point Average (GPA) < D average over the last six months	Transcript (GPA)	Youth, OYEP-HECC, ARPA-Prosperity 10K	Assessments
Transcripts from Training Vendor (including prior to completion and at completion)	Transcript from Training Vendor	Adult/DW/Youth/WorkEx/OYEP HECC	Training, Post-Secondary Ed. Documentation
Veteran Priority of Service Document Proof of Military Service (DD-214)	DD-214	Adult/DW/Youth/WorkEx/OYEP HECC	Priority of Service
W-2 (IRS form reporting annual wages)	W-2	Adult/DW/Youth/WorkEx/OYEP HECC	Employment Verification
Wage/Time Sheet Verification	Wage/Time Sheet	Adult/DW/Youth/WorkEx/OYEP HECC	Work Based Training Documentation
Work Experience Agreement	Work Experience Agreement	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Work Based Training Documentation
Work Experience Participant Handbook	Work Experience Participant Handbook	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Work Based Training Documentation
Work Experience (WEX) Time Sheets matching	WEX Time Sheets	Youth, OYEP-HECC, ARPA-Prosperity 10K	Work Based Training Documentation

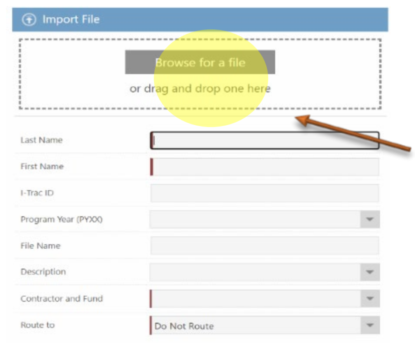
Financials (all in one upload chronological order)			
Work Related Image for Success Story (PNG or JPG file formats only)	Success Story Image	Adult/DW/Youth/Pathways/Prosperity 10K and ARPA P10K	Success Story
Workshop completed with a certificate	Workshop Name Certificate	Adult/DW/Youth/WorkEx/OYEP HECC	Non-DOL Credentials
WorkSource Career Plan (from I-Trac)	WorkSource Career Plan	Adult/DW/WorkEx/Prosperity 10K	Goals/Plans

Appendix D: Quick Sheet

Logging in:

- Access via Chrome or Edge: https://app.ebridge.com/ebridge/3.0/main.aspx
- You must be assigned a User Name and password, after submitting your User Name and Passcode, a security code will be emailed to you, this is necessary to access the system
- If you have a **cell phone** that you would like the security code sent to via text, instead of email, you can update this by clicking on the **Account** tab and update the **Phone Number** field

Uploading a File into eBridge:



- **Import**:
    - Scan and save the document
    - Open the document and make sure it is legible and oriented properly (if upside down or sideways, rotate appropriately and save)
    - Click on the **Import** tab
    - In the **Import File** window, you can either drag and drop the document or click to Browse and find the file
    - Enter each field, use the I-Trac Number, then for the **File Name** and **Description** use Appendix C for guidance.

Retrieve a File in eBridge:

- Click the **Retrieve** tab
    - Search by name or I-Trac ID
        - To see all files, enter an apostrophe ("*") in any field then click **Search**
    - Once you find the file to open, single-click on the **Document** Icon in the **View** column or double-click the row where the document is located
    - You can add **Comments**, **Stamps**, or **Block** out (Redact) by using the tool bar at the top, you will need to click the Save button to make the changes permanent

How to change the File Name or Description Index Fields or Delete a File:

- **Retrieve** a file then click on the **Edit** button
    - **Redact:** if you need to make information non-viewable, click the "White Out" button, choose Black then use your mouse to cover the text to react (click the Save button, a disk icon)
    - **Rotate:** if the scan needs to be rotated, use the curly arrows (Rotate) buttons (click the Save button, a disk icon)
    - **NOTE**: Once changes are made, they are **permanent**, no prior revisions can be retrieved.
- If you have a file that needs to be deleted contact a **Manager** who will ask RWP to remove.