

JOSH GREEN, M.D.
GOVERNOR

SYLVIA LUKE
LIEUTENANT GOVERNOR



JADE T. BUTAY
DIRECTOR

WILLIAM G. KUNSTMAN
DEPUTY DIRECTOR

MARICAR PILOTIN-FREITAS
ADMINISTRATOR

STATE OF HAWAII
KA MOKU'ĀINA O HAWAII
DEPARTMENT OF LABOR AND INDUSTRIAL RELATIONS
KA 'OIHANA PONO LIMAHANA
WORKFORCE DEVELOPMENT DIVISION
830 PUNCHBOWL STREET, ROOM 329
HONOLULU, HAWAII 96813
<http://labor.hawaii.gov/wdd/>
Phone: (808) 586-8877 / Fax: (808) 586-8822
Email: dlii.workforce.develop@hawaii.gov

May 30, 2023

SN (7)

JOINT WIOA BULLETIN NO. 02-23

TO: WIOA Partners and WDD Staff

FROM: Maricar Pilotin-Freitas, Administrator
Workforce Development Division

SUBJECT: Document Management Module in HireNet Hawaii

PURPOSE

The purpose of this bulletin is to provide guidance and instructions on the use of the Document Management module in HireNet Hawaii. This module will allow for the transition from hard copy participant files to paperless files stored securely in the HireNet Hawaii system.

BACKGROUND

The Document Management module will allow scanned documents to be captured and reviewed online and stored securely in HireNet Hawaii's system. This module will support Wagner-Peyser, WIOA, Trade Adjustment Act, and any generic programs. The Document Management module includes the ability to attach supporting documents to program verifications and case notes, as well as tagging and retrieving documents associated with a participant record.

POLICY

American Job Centers (AJCs) are no longer required to maintain hard copy files of participant information scanned into HireNet Hawaii's Document Management module. Furthermore, documents scanned into the HireNet Hawaii system take the place of hard copy files for verification, monitoring and audit purposes. Medical and disability documentation may be uploaded into HireNet Hawaii only if necessary for eligibility. **Once files are properly scanned into the HireNet Hawaii system, paper records shall be destroyed (i.e., shredded) and any documents that have been saved to a computer hard drive, desktop, removable media, cloud storage or in any other environment shall be deleted immediately.** Such records shall only be maintained in the HireNet Hawaii system.

AJCs must ensure that all scanned documents are properly reviewed and meet the following requirements:

- Complete and aligned
- Clear and legible

Documents uploaded into the HireNet Hawaii system must be current and be kept through the program participation. Retention of records in the system will follow the USDOL guidelines.

AJCs must upload supporting documents into HireNet Hawaii in accordance with eligibility guidelines and timeframes. AJCs must ensure that participant information is accurately reported in the HireNet Hawaii system and that documents are uploaded for all fields that require verification.

Document Management module privileges will be assigned based on the chart below:

STAFF ACCESS LEVEL	PRIVILEGE
Admin Staff	Upload, View, Search, Edit, Download and Delete documents
AJC Supervisor	Upload, View, Search, Edit, Download documents; Submit requests for deletion of documents
AJC Staff	Upload, View, Search, Edit, Download documents

Only under limited circumstances will staff be allowed to delete a document that has already been saved to a participant's file. The AJC Supervisor will review all requests for deletion and will send all approved requests for deletion to Admin staff for follow-up using *Attachment 3: HireNet Hawaii Document Removal Form*.

PROCEDURES

Document Uploading

AJCs may upload documents by one of three ways:

- Scanning into a field in the WP/WIOA/TAA Application
- Scanning into the Documents (Staff) section
- Scanning into a Case Note

For the step-by-step process for uploading documents into the HireNet Hawaii system, please refer to *Attachment 1: HireNet Hawaii Document Uploading*.

Document Titling

When uploading documents into HireNet Hawaii, it is **IMPORTANT** to follow the document titling guidelines. As a result, documents will be easier to locate within the system, as well as provide consistency.

When titling documents to be uploaded into the HireNet Hawaii system, please follow the titling guidelines below:

1. Last Name of Participant
2. Underscore
3. First Name of Participant
4. Underscore
5. Document Type

Example: Thomas_John_SocialSecurityCard.pdf

EFFECTIVE DATE

This bulletin is effective immediately.

INQUIRIES

Inquiries regarding this bulletin may be directed to Mr. Jayson Muraki at (808) 586-8878.

ATTACHMENTS

- Attachment 1: HireNet Hawaii Document Uploading
- Attachment 2: HireNet Hawaii Document Search
- Attachment 3: HireNet Hawaii Document Removal Form

Attachment 1 - HireNet Hawaii Document Uploading

This attachment provides step-by-step instructions on the use the Document Management module in HireNet Hawaii.

AJCs may upload documents by one of three ways:

- Scanning into a field in the WP/WIOA/TAA Application
- Scanning into the Documents (Staff) section
- Scanning into a Case Note

Option 1: Scanning into a Field in the WP/WIOA/TAA Application

Staff have the ability to scan, upload or link documents directly into specific fields in a participant's application.

*** Social Security Number:**

751037917

[Edit SSN](#) 

*** SSN Verify:**

[[Verify](#) | [Scan](#) | [Upload](#) | [Link](#)]

✓ Social Security Card

Option 2: Scanning into the Documents (Staff) section

Staff have the ability to scan, upload, or link documents directly through the Documents (Staff) section under a participant's General Profile.

<ul style="list-style-type: none"><input type="checkbox"/> My Individual Profiles<input type="checkbox"/> Personal Profile<ul style="list-style-type: none"><input type="checkbox"/> General Information<input type="checkbox"/> Background<input type="checkbox"/> Activities<input type="checkbox"/> Paths<input type="checkbox"/> Memo<input type="checkbox"/> Documents<input type="checkbox"/> Search History Profile<input type="checkbox"/> Self Assessment Profile<input type="checkbox"/> Communications Profile	<ul style="list-style-type: none"><input type="checkbox"/> My Individual Plans<input type="checkbox"/> Employment Plan Profile<input type="checkbox"/> Training Plan Profile<input type="checkbox"/> Benefits Plan Profile<input type="checkbox"/> Financial Plan Profile	<ul style="list-style-type: none"><input type="checkbox"/> Staff Profiles<input type="checkbox"/> General Profile<ul style="list-style-type: none"><input type="checkbox"/> Summary<input type="checkbox"/> Case Notes<input type="checkbox"/> Activities<input type="checkbox"/> Documents (Staff)<input type="checkbox"/> Identity Issues<input type="checkbox"/> Case Management Profile<ul style="list-style-type: none"><input type="checkbox"/> Case Summary<input type="checkbox"/> Programs<input type="checkbox"/> Plan
--	---	--

Once on the Documents (Staff) section, click on the option you want to proceed with.

Documents Available

Listed below are the documents available on the selected individual. Click the View link below to view that particular item.

[Show Filter Options \(Showing all records\)](#)

Results View: [Summary](#) | [Detailed](#)
Click a column title to sort.

View Thumbnails

No document was found



Similar to scanning or uploading into a specific field in a participant's application, complete the necessary fields to scan or upload the document.

Document Association

If you would like to categorize the associated document to a specific program, subcategory, application or verification document, please use the controls in this section to do so.

Program: ← Select WP/WIOA/TAA Program

Application: ← Select appropriate application

Verification Item: ← Select appropriate verification field

Verification Type: ← Select appropriate verification type

Document Information

Document Description: ← Select appropriate Document Description

Document Tags: Do not enter Personal Identifiable Information (PII) into this field.
Keywords that will be indexed with this attachment

← Enter tags for document. Specify the type of document. Press enter after inserting each tag. Tags are important when searching for documents

User Accessible: Yes No ← Specify whether you want to allow the user (participant) access to this document

Date Received: ← Enter the received date for the document
If left blank, today's date will be used.

Document Expires: ← Check if you want the document to expire at a specific time

Document Name (Optional): ← Enter document name

Scan Options

Select Source: ← Select scanner

Pixel Type: BW Gray RGB ← Select Black & White (BW), Gray or Color (RGB)

Resolution: ← Select Document Resolution

Settings

Show Source User Interface

Use Auto Document Feed

Insert new scanned image before current image

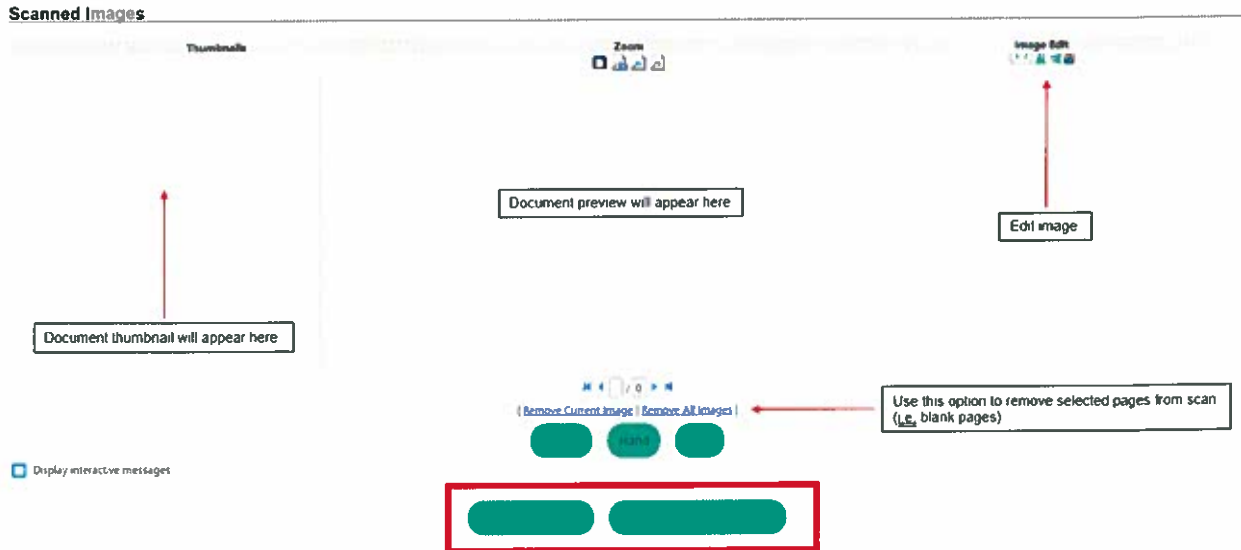
Discard Blank Page

Duplex ← Select any additional settings for the scan job



After completing all the necessary fields, click on Scan Document.

Once you click on Scan Document, HireNet Hawaii will generate a preview and thumbnail of the document for your review. To edit your document, use the icons provided to edit your document. Once you make the necessary edits, click on Upload Document to finish the uploading process.



Option 3: Scanning into a Case Note

Staff will have the ability to scan or upload documents directly through the Case Notes section.

To add a case note, click on Case Notes under the Staff Profiles section.

- My Individual Profiles
 - Personal Profile
 - General Information
 - Background
 - Activities
 - Paths
 - Memo
 - Documents
 - Search History Profile
 - Self Assessment Profile
 - Communications Profile
- My Individual Plans
 - Employment Plan Profile
 - Training Plan Profile
 - Benefits Plan Profile
 - Financial Plan Profile
- Staff Profiles
 - General Profile
 - Summary
 - Case Notes**
 - Activities
 - Documents (Staff)
 - Identity Issues
 - Case Management Profile
 - Case Summary
 - Programs
 - Plan
 - Assessments
 - Report Profile
 - Tracking
 - Statistics
 - Combined Assessment
 - Labor Exchange

Notes

Activities

Documents (Staff)

(Add New Case Note | Print Selected Case Notes |

You currently have no saved case notes

Add New Case Note

Next, complete the Case Notes sections with the appropriate information. At the bottom of the Case Notes, you are able to select whether you want to either upload or scan a document with your Case Note. If you select "Scan a Document," please refer to Option 2 on how to complete the fields.

Case Note Attachment(s)

Listed below are the documents associated with this case note. Click the View link below to view that particular item.

Results View: [Summary](#) | [Detailed](#)

Click a column title to sort

[Top](#) | [Filter Criteria](#) | [Bottom](#)

View Thumbnails

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](#)

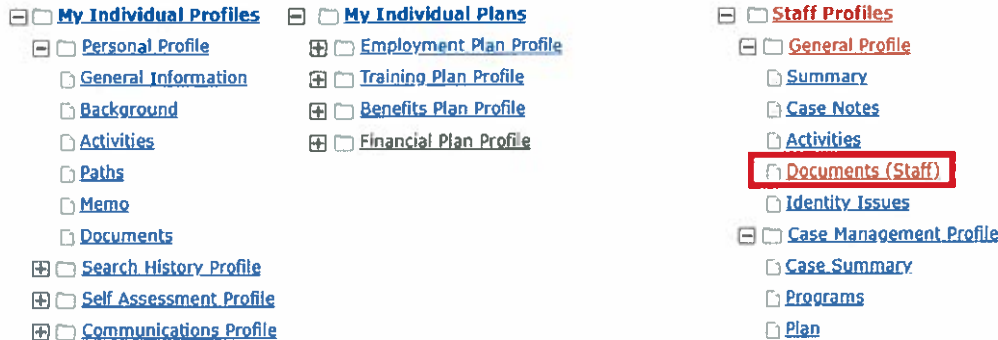
(Add a Document | Scan a Document |

[Supported File Format](#)

Multiple documents can be uploaded simultaneously, but must be selected one-by-one.

Attachment 2 - HireNet Hawaii Document Search

This attachment provides step-by-step instructions on how to search for documents uploaded into HireNet Hawaii's Document Management module. HireNet Hawaii allows staff to search for uploaded documents to participant's case files. To search for a document, following the step-by-step instructions below: Navigate to the desired participant's case file and go to the Documents (Staff) section. *Staff Profiles → General Profile → Documents (Staff)*



On the next page, click on the "+ Show Filter Options," to expand the filter search options.



Documents Available

Listed below are the documents available on the selected Individual. Click the View link below to view that particular item.

[+ Show Filter Options \(Showing all records\)](#)

Results View: [Summary](#) | [Detailed](#)
Click a column title to sort.

Enter the desired filters for your search, then click on "Filter" at the bottom of the section.

Documents Available

Listed below are the documents available on the selected Individual. Click the View link below to view that particular item.

[Hide filter Options](#)

Document Filters

General Criteria

Category:

Document Tags:

Status: Unexpired Expired All

Specific Criteria

Program:

Application:

Verification Item:

Verification Type:

[Filter](#) [Reset Filter](#)



Hawaii Department of Labor & Industrial Relations
Workforce Development Division
830 Punchbowl Street, Room 329
Honolulu, Hawaii 96813
Fax: (808) 586-8822

HireNet Hawaii Document Removal Form

SECTION I: Staff Information

Request Date: _____

Division/Branch: _____

Staff Name: _____

Phone: _____

Email: _____

SECTION II: Document Removal Information

Program Affiliation:

- Wagner-Peyser WIOA Adult WIOA DW WIOA Youth TAA JVSG NDWG

Participant Name: _____

State ID Number: _____

Document Name: _____

Document Type: _____

Document Upload Date: _____

Manager/Supervisor

Date