

Manage Employment

Add a Document of Record

Lesson Objective:

Upon completion of the Add a Document of Record lesson, you will be able to:

Objective

- Add a Document of Record for an employee.



Coordinators can maintain employee documentation by adding verified records such as certificates, letters, and compliance documents directly to the employee profile.

When adding a document, the Coordinator must choose a valid Document Type, attach supporting files. Only document types configured for the legal employer or business unit can be selected.

The system requires that each uploaded document include at least one attachment. Coordinators can upload files through the drag-and-drop, ensuring the record is stored in the employee's document repository.

Focus



- Learn how to navigate to the Document Records section through My Client Groups and understand where all employee-related documents are stored and maintained.
- Understand how to add a new Document of Record by selecting the appropriate Document.
- Gain clarity on how to upload documents using both available methods file browsing and drag-and-drop ensuring the correct file is attached without errors.

Navigation



My Client Groups →

Quick Actions →

Show More →

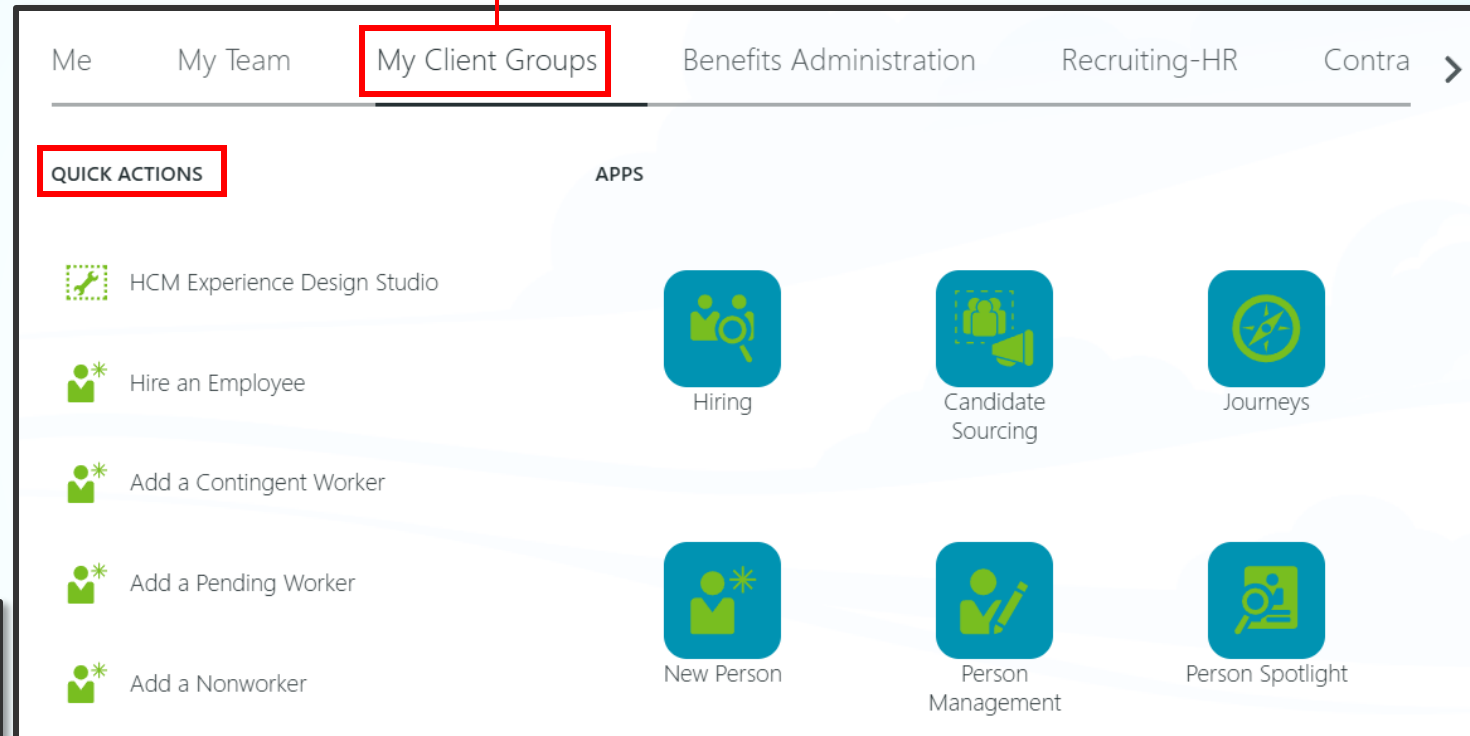
Document Records(Section) →

Document Records

Manage Employment: Add a Document of Record

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Select My Client Groups tab



-  Contact Info
-  Dependent and Beneficiary Contacts
-  Change Photo

Show More

2

From Quick Actions section, select Show More link from drop-down list

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Document Records



Archived Document Records



Document Delivery Preferences



Document Records



Mass Download of Document Records

3

Select Document Records under the Document Records section

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In the Search field, enter the employee's name, person number, or assignment number

< Document Records

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Search by name, person number, or assignment number

Business Title

Assignment Status

Effective As-of Date

Include Terminated Work Relationships

Worker Type

Filters

Sort By Relevance

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Name	Business Title	Person Number	Assignment Number	Assignment Status	Worker Type	Work Email	Work Phone
evonya jones Augustin	9004 - Polling Place Clerk *			Active - Payroll Eligible	Employee		
SUMATI Hodge King	9012 - Election Worker *			Active - Payroll Eligible	Employee		



The Coordinator can select the employees directly from the **Document Records** page instead of using the search



Apply filters under search bar to ease the search to find an employee

Manage Employment: Add a Document of Record

< Document Records

Q 052465 — Lakethia Mccray

Lakethia Mccray



Select **Employee** from the search result

Manage Employment: Add a Document of Record



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LM

Document Records

Lakethia Mccray, 32130 - Detention Sergeant

Search by type, name, or number

Category

Excluded

Last Updated

Type

Unpublished

Filters

+ Add

Download

Sort By Last Updated, New to Old

Payslip

Past-dated

clmnc

Last Updated Date

10/29/25 12:32 PM

Attachment Count

0

From Date

3/28/11

Payslip

Past-dated

ebacefw

Last Updated Date

10/15/25 3:36 PM

Attachment Count

0

From Date

12/29/00

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From Document Records page, review Documents assigned to Employee. If no Documents were assigned, a message, "There's nothing here so far", will appear

Manage Employment: Add a Document of Record



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Click +Add to add new Document Record to selected employee

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LM

Document Records

Lakethia Mccray, 32130 - Detention Sergeant

Search by type, name, or number

Q

Category

Excluded

Last Updated

Type

Unpublished

Filters

🔖

+ Add

Download ▾

Sort By Last Updated, New to Old ▾

Payslip

Past-dated

clmnc

Last Updated Date
10/29/25 12:32 PM

Attachment Count
0

From Date
3/28/11

✎ ▾

Payslip

Past-dated

ebacefw

Last Updated Date
10/15/25 3:36 PM

Attachment Count
0

From Date
12/29/00

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Manage Employment: Add a Document of Record

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Select appropriate
Document Type from
drop-down list

LM

New Document Record
Lakethia Mccray

Cancel

Submit

Document Type

▼

Required

Manage Employment: Add a Document of Record

LM

New Document Record
Lakethia Mccray

Cancel

Submit

Document Type
Birth certificate

Country
All Countries

Category
Benefits

Description
Documents associated with benefits certification - Birth certificate

Attachments

Drag and Drop
Select or drop files here.

URL

Add URL

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Click **Drag and Drop** button to attach file, or Paste URL and then click **Add URL** to add the file as a link



Indicate the **country** the document type applies to. Default is **All Countries**.

When workers create a document record this displays as a read-only field. It isn't available for selection and can't be updated once the document type is created. It also doesn't restrict selection of a document type by matching any assignment information of the worker.



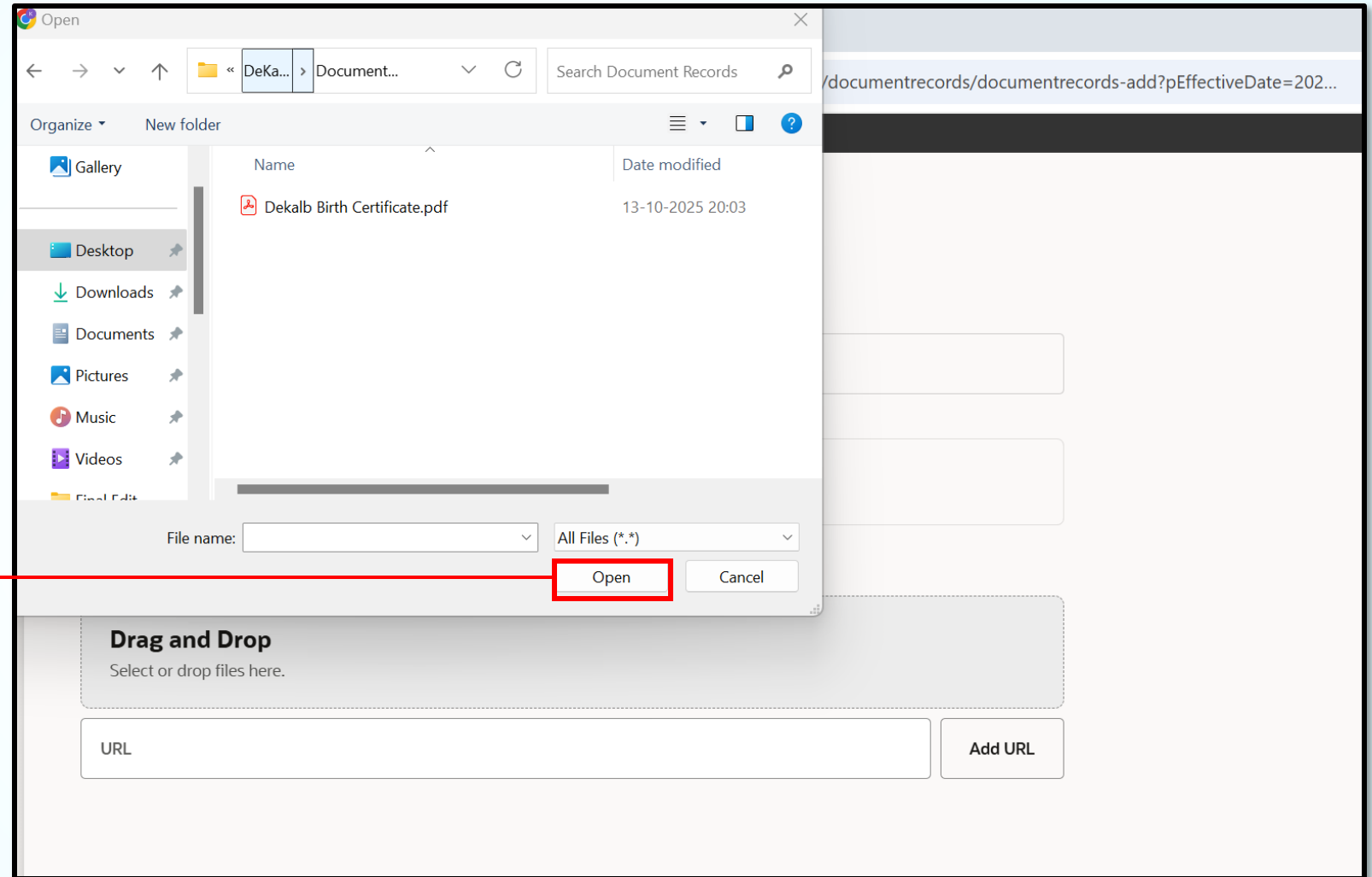
Group documents into meaningful **categories** at a higher level; for example, "Absence".
You can use the DOCUMENT_CATEGORY lookup type to define new document categories and subcategories

When workers create a document record this displays as a read-only field. It isn't available for selection when creating the document record and can't be updated after the document type is created.

Manage Employment: Add a Document of Record

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Click Open to attach file



Manage Employment: Add a Document of Record

Select Submit

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LM **New Document Record**
Lakethia Mccray

Document Type
Birth certificate

Country
All Countries

Category
Benefits

Description
Documents associated with benefits certification - Birth certificate

Attachments

Drag and Drop
Select or drop files here.

URL Add URL

Dekalb Birth Certificate.pdf 887.13 KB Last updated on 12/2/25

Dekalb Birth Certificate.pdf 887.13 KB Last updated on 12/2/25

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Once Document is attached, select "Delete" symbol to remove document if necessary

Conclusion



- Successfully accessed the employee's Document Records page and understood how to review any existing documents or system messages indicating no documents are currently assigned.
- Added a new Document of Record by selecting the correct Document Type.
- Uploaded an attachment using the supported upload methods and ensured the file was correctly added to the employee's document list.
- Completed the document addition process and returned safely to the Document Records page, handling system navigation and closing actions properly.