On-Site Imaging (OSI)
Quick Reference Guide

NEW YORK STATE OF OPPORTUNITY. | **Office of Temporary and Disability Assistance**

Introduction

On-Site Imaging (OSI) allows participating districts to search, view, categorize and Index images that are submitted by Temporary Assistance (TA), Supplemental Nutrition Assistance Program (SNAP), Medical Assistance (MA) and Home Energy Assistance Program (HEAP) applicants/recipients using the NYDocSubmit app.

Accessing On-Site Imaging

From CentraPort, access the I/EDR Main Menu.

In the OSI Main Menu Section of the I/EDR Main Menu, click the **Attestation** ⓘ (Attestation button). Read the attestation agreement. Click the **I Agree** button.
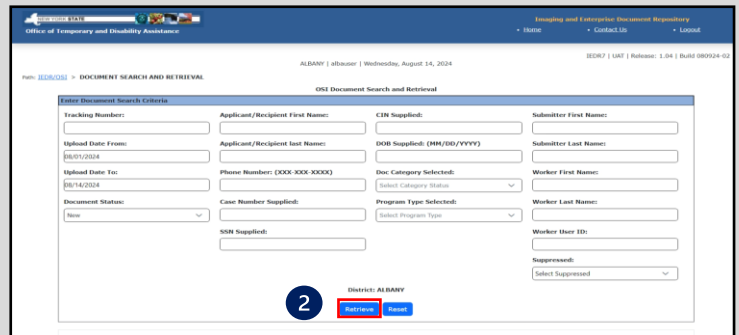
Once the Attestation is agreed to, the OSI Main Menu will appear.
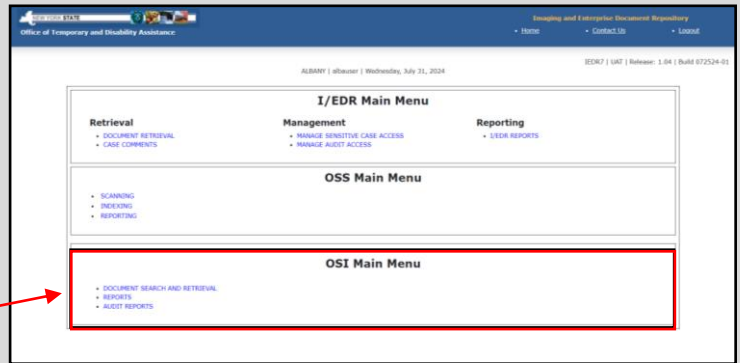
Searching Images in On-Site Imaging

1 From the OSI Main Menu, select **Document Search and Retrieval.**

2 Enter the desired search criteria. Click the **Retrieve** button.

OSI will display a list of all documents meeting the entered search criteria.

The Search Results can be sorted by clicking the columns at the top of the table.
To increase the number of results per page (10, 25, 50), click the drop down under the results table.

Viewing Images in OSI

The OSI View Document screen displays the uploaded image(s) from the NYDocSubmit mobile app along with other metadata. In addition to viewing the images, this screen can be used to mark images as non-indexed and suppress/unsuppress images (with the appropriate user roles).

From the OSI Search and Retrieval Screen, click the 👁 (view icon) next to the desired image.

Select	Upload Data ↑↓	Tracking Number ↑↓	Status ↑↓	A/R First Name ↑↓	A/R Last Name ↑↓	Phone Number ↑↓	Case Nu
👁 🖬	08/06/2024 11:00:39 AM	ALBA-TEST-20240806A	New	Sirisha	Talasila		P
👁 🖬	08/05/2024 11:21:21 AM	ALBA-2408-AFZBV3DH	New	Tammy	Trainer	(222) 222-2222	p
👁 🖬	08/07/2024 03:36:39 PM	ALBA-TEST-20240807B	New	Sirisha	Talasila		P
👁 🖬	08/14/2024 12:02:51 PM	ALBA-2408-RE5TI84R	New	Daniel	Priddle		
👁 🖬	08/14/2024 12:21:37 PM	ALBA-2408-FC8K66AG	New	Tim	Anderson	(555) 518-5555	FSOSS3
👁 🖬	08/08/2024 11:00:39 AM	ALBA-TEST-20240808A	New	Sirisha	Talasila		p

The OSI View Document screen will display:

Return to Document Search and Retrieval Screen

Information associated to image(s)

Image uploaded in NYDocSubmit

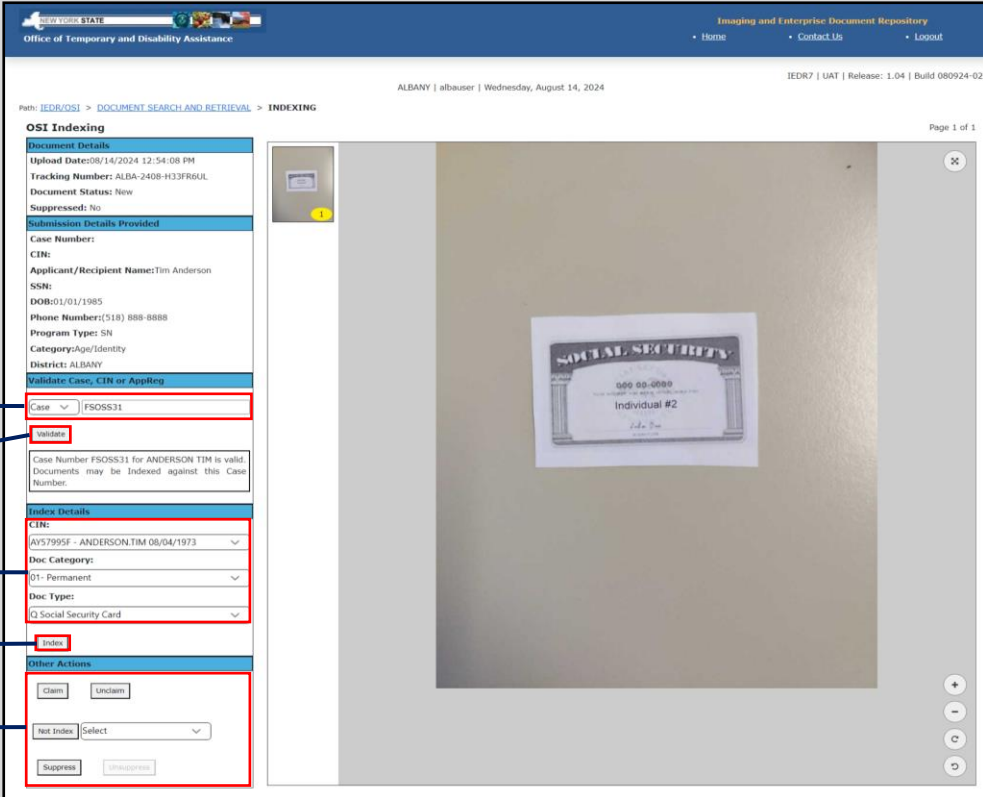*Mark image(s) as non-indexed, suppressed or to unsuppress image(s).*

Indexing Images in OSI

Once images are retrieved and indexed in OSI, the images are moved and stored in I/EDR.

1 From the OSI Search and Retrieval Screen, click the ▤ (indexing icon) next to the desired transaction.

Select	Upload Data ↑↓	Tracking Number ↑↓	Status ↑↓	A/R First Name ↑↓	A/R Last Name ↑↓	Phone Number ↑↓	Case Nu
👁 ▤	08/06/2024 11:00:39 AM	ALBA-TEST-20240806A	New	Sirisha	Talasila		P
👁 ▤	08/05/2024 11:21:21 AM	ALBA-2408-AFZBV3DH	New	Tammy	Trainer	(222) 222-2222	p
👁 ▤	08/07/2024 03:36:39 PM	ALBA-TEST-20240807B	New	Sirisha	Talasila		P
👁 ▤	08/14/2024 12:02:51 PM	ALBA-2408-RE5TI84R	New	Daniel	Priddle		
👁 ▤	08/14/2024 12:21:37 PM	ALBA-2408-FC8K66AG	New	Tim	Anderson	(555) 518-5555	FSOSS3
👁 ▤	08/08/2024 11:00:39 AM	ALBA-TEST-20240808A	New	Sirisha	Talasila		P

The OSI Indexing screen will display:

2 Select **Case, CIN or App Reg** from the drop down and enter **Case, CIN or App Reg** number in the text box.

3 Click the **Validate** button. *Review the confirmation message, and if Invalid, take appropriate action.*

4 Use the drop down menus to enter **CIN** (if applicable), **Doc Category** and **Doc Type**.

5 Click the **Index** button.

> *You will be returned to the OSI Document Search and Retrieval screen, displaying the message:*
>
> ***Indexed and successfully uploaded to I/EDR.***

6 The **Other Actions** section can be used to claim/unclaim images, mark images as not-indexed and suppress images (with appropriate user roles).