



QUICK REFERENCE GUIDE

Uploading Documents

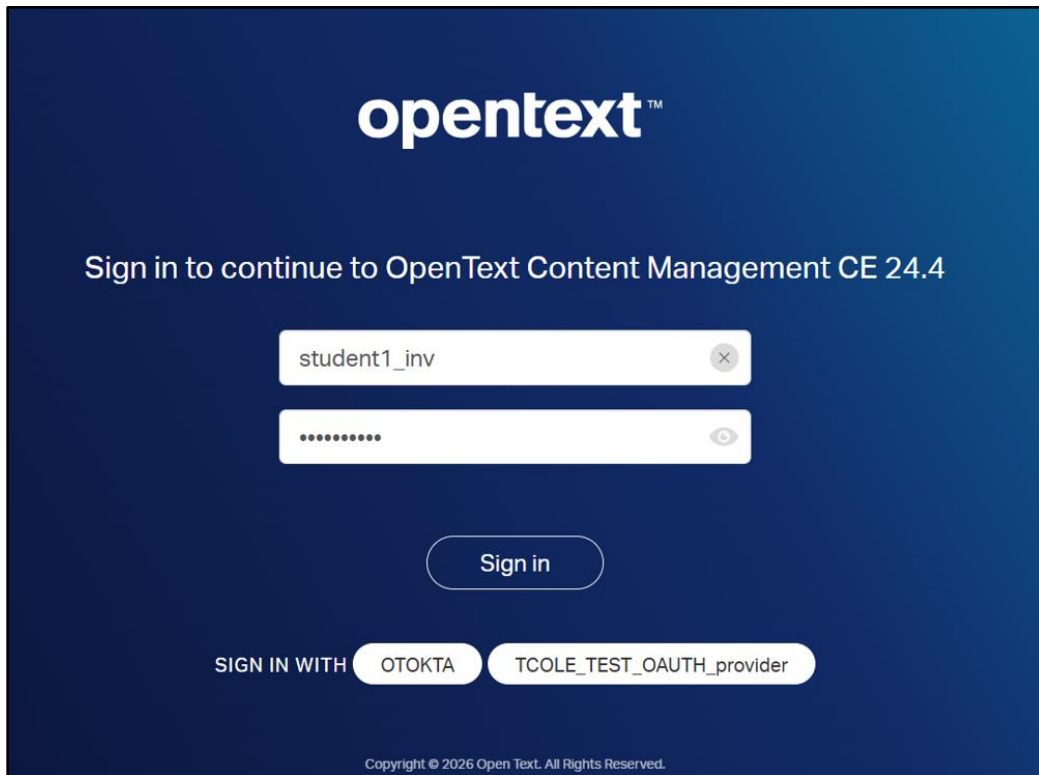


Who Should Use This Guide

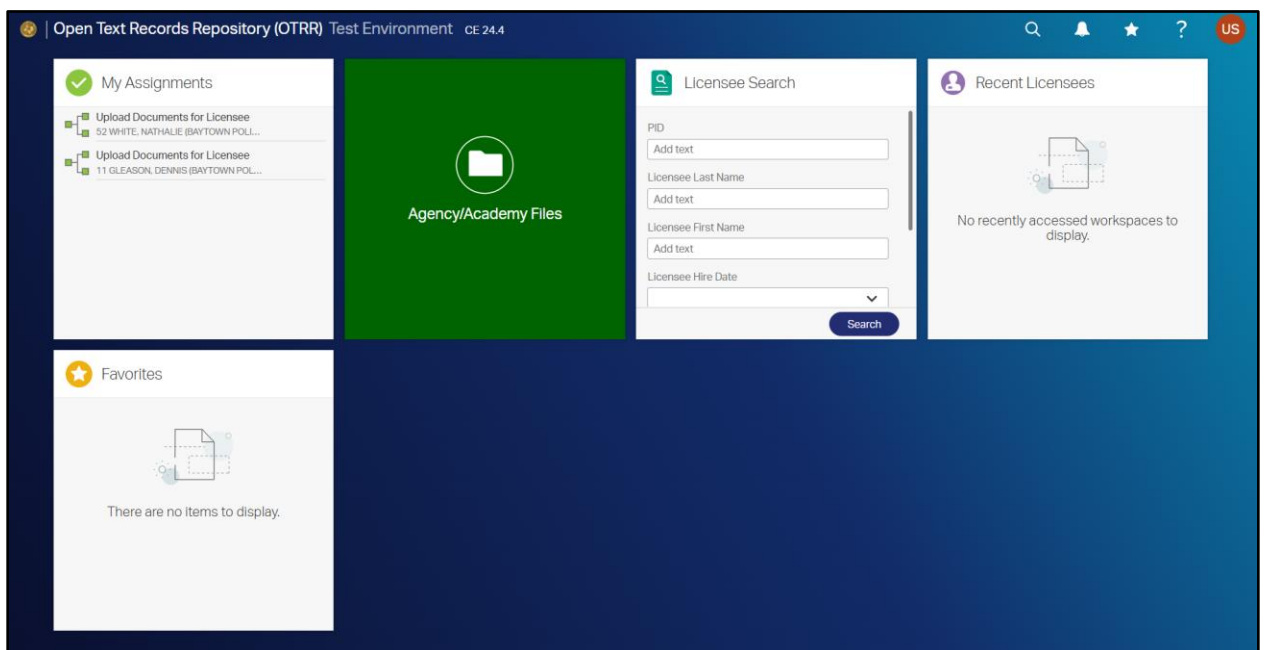
Agency/Academy Uploaders

Uploading Documents (Agency/Academy)

1. Log in to OTRR.




Your Home Page appears with tiles based on your role.

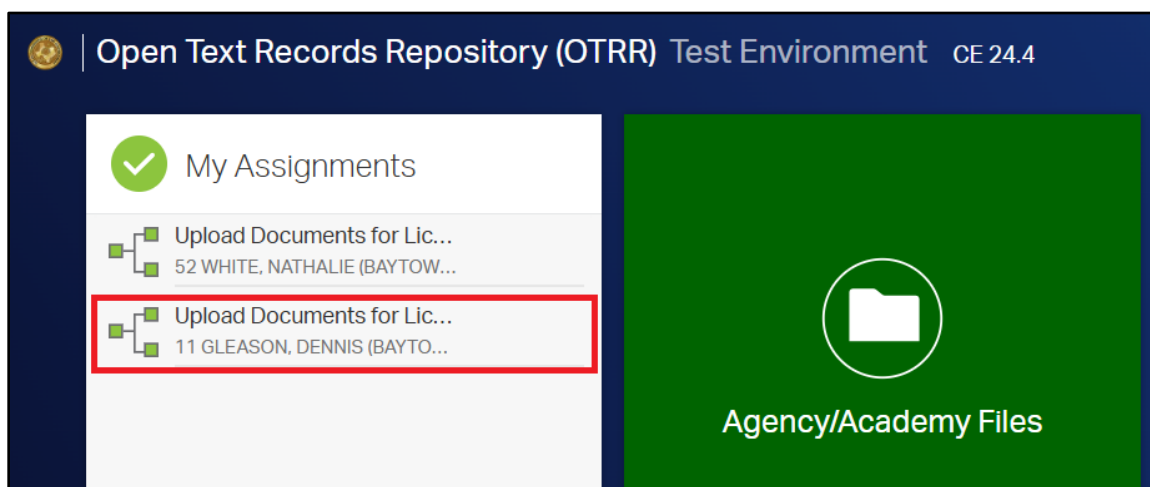


As a designated uploader for your agency/academy, you will mainly use:

- **My Assignments** – view upload tasks assigned to you (i.e., *Upload Documents for Licensee*)
- **Agency/Academy Files** – upload documents for investigations

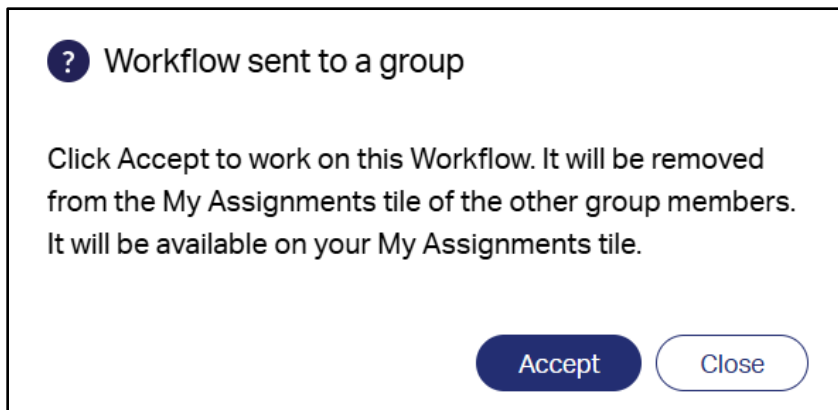
 You receive an email notification when an investigation requires your agency/academy to upload documents.

2. From **My Assignments**, click the **Upload Documents for Licensee** task for appropriate licensee.



3. If you're the only designated uploader for your agency/academy, continue to the next step.

If your agency/academy has multiple designated uploaders, an additional window appears:



Click **Accept** to take ownership of the upload task. The task is automatically removed from the **My Assignments** tile of other uploaders.

4. Review the release form and any additional instructions.

The task page displays:

- Licensee details (PID, name, agency/academy name)
- Name of the investigator/recruiter requesting documents
- The release form attached by the investigator/recruiter

Upload Documents for Licensee

Upload documents for licensee

Licensee PID 11

Licensee Last Name GLEASON

Licensee Last Name DENNIS

Agency/Academy BAYTOWN POLICE DEPT.

A background investigator is requesting documents regarding the above licensee while at this agency/academy. If you're able and willing, please accept.

Investigator **IS** Investigator, Student1 (student1_inv)

Attachments Activities

student1_release_doc.pdf
Add description

Accepted Close

5. Click **Accepted**.

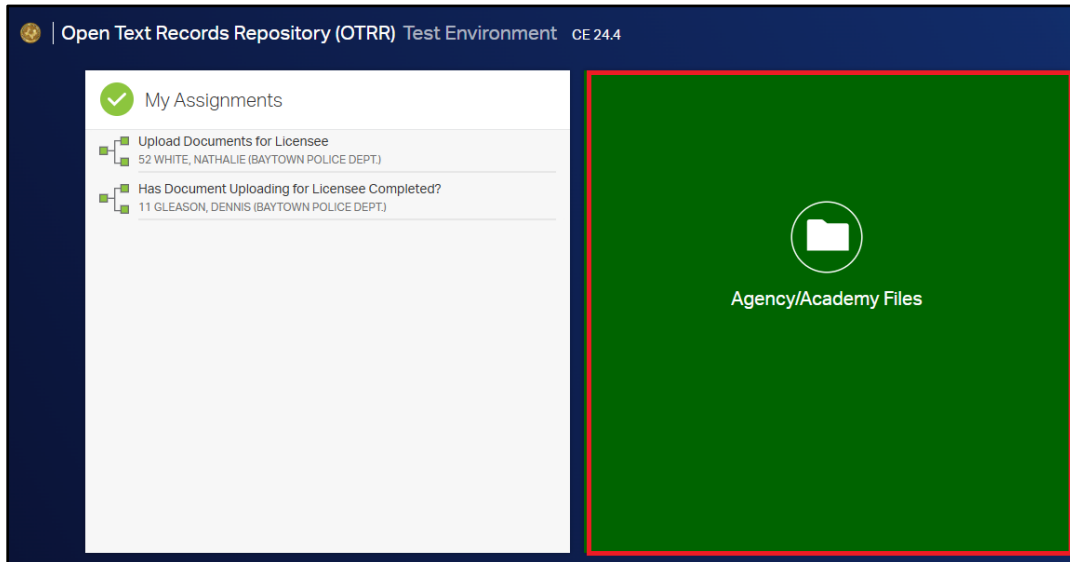
A new task appears **My Assignments** tile.

My Assignments

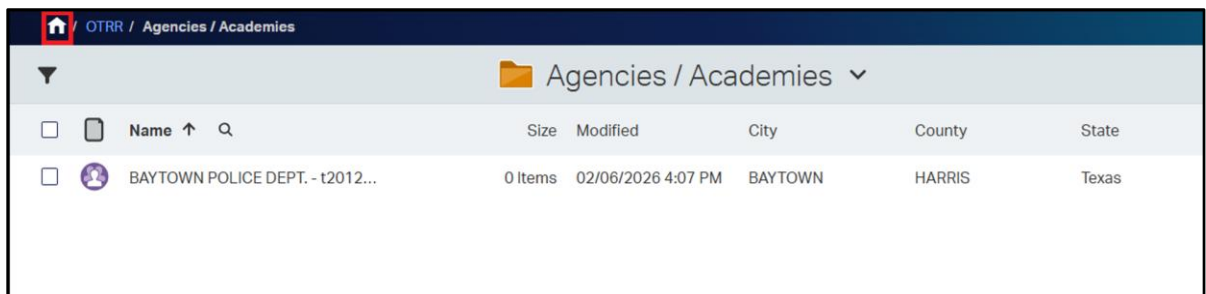
Has Document Uploading for Licensee Completed?
11 GLEASON, DENNIS (TCOLE)

The task has a 10-day expected duration. If the due date passes without completion, the task is marked *Late* and is visible to the investigator, recruiter, and TCOLE administrator.

6. To upload the documents, click the **Agency/Academy Files** tile.

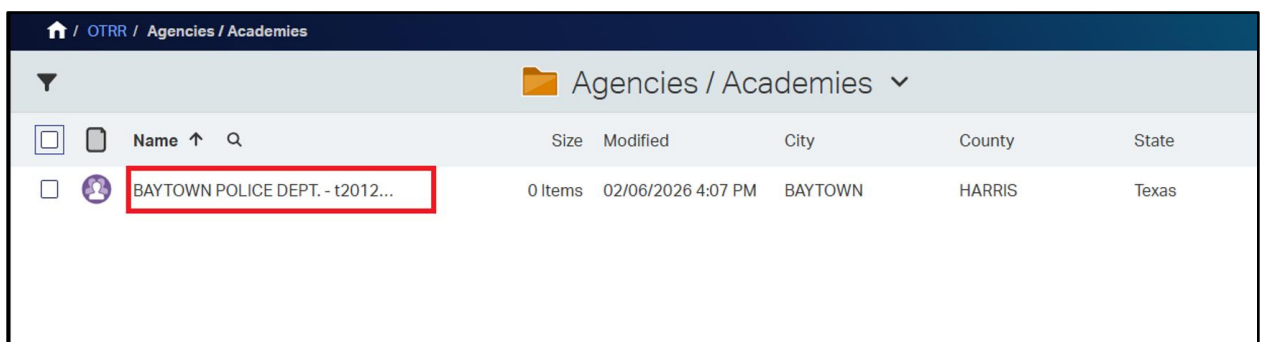


7. Your agency/academy workspace appears.



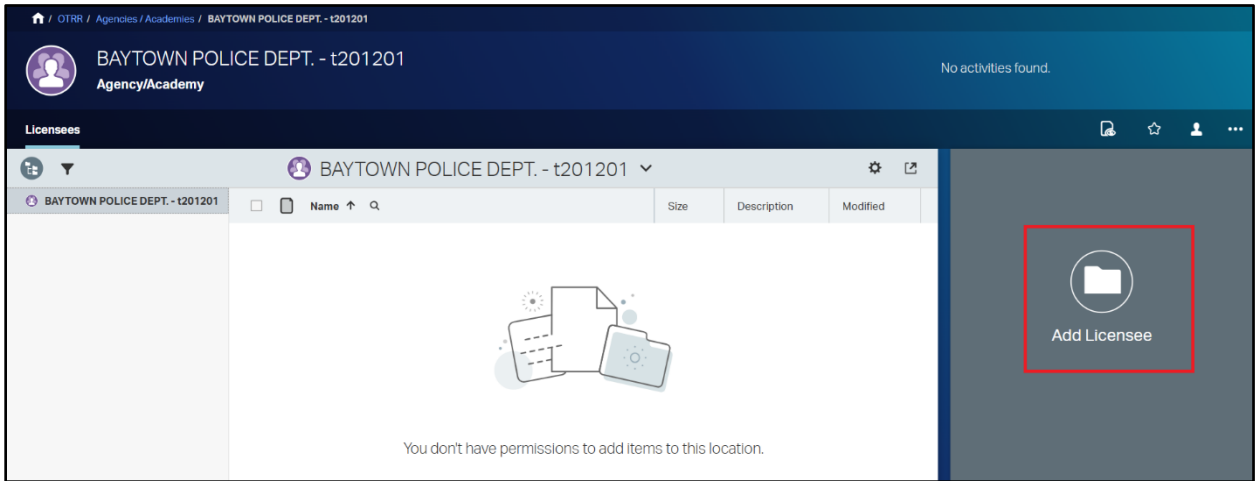
Most uploaders will only see one agency/academy workspace listed here. If you support multiple agencies/academies, you will see more.

8. Click the name of the agency/academy associated with the licensee.

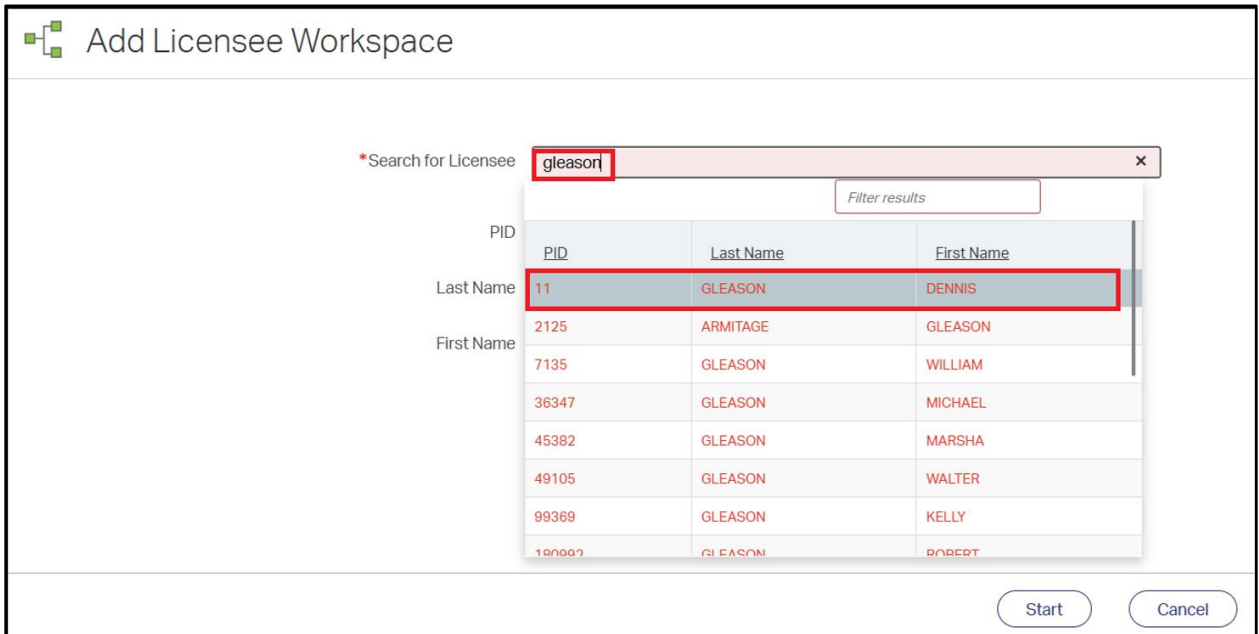


⚠️ You are responsible for creating a licensee workspace if one does not exist yet. A licensee workspace may not exist if the licensee has not previously been hired by your agency.

9. Click **Add Licensee**.



10. Search for the licensee and select the matching result.



11. Click **Start**.

The screenshot shows a dialog box titled "Add Licensee Workspace". At the top, there is a search field labeled "*Search for Licensee" with the value "11" and a clear button (x). Below the search field, a dropdown menu is open, displaying the following information: "PID 11", "Last Name GLEASON", and "First Name DENNIS". At the bottom right of the dialog, there are two buttons: "Start" and "Cancel". The "Start" button is highlighted with a red rectangular box.

12. Open the newly created licensee workspace.

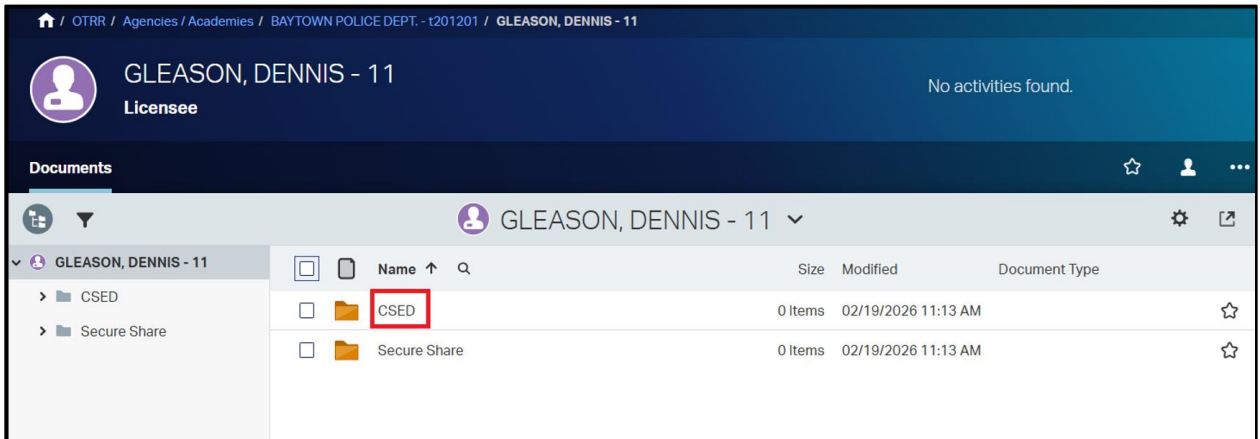
The screenshot displays the SharePoint interface for the "BAYTOWN POLICE DEPT. - t201201" workspace. The breadcrumb trail at the top reads: "/ OTRR / Agencies / Academies / BAYTOWN POLICE DEPT. - t201201". The main header shows the workspace name and "Agency/Academy". Below this, the "Licensees" section is active, showing a list of folders. The folder "GLEASON, DENNIS - 11" is highlighted with a red rectangular box. The list table has columns for "Name", "Size", and "Modified". The "GLEASON, DENNIS - 11" folder is listed with "2 Items" and a modification date of "02/19/2026 11:14 AM".

The licensee workspace may contain up to two folders:

- CSED
- Secure Share

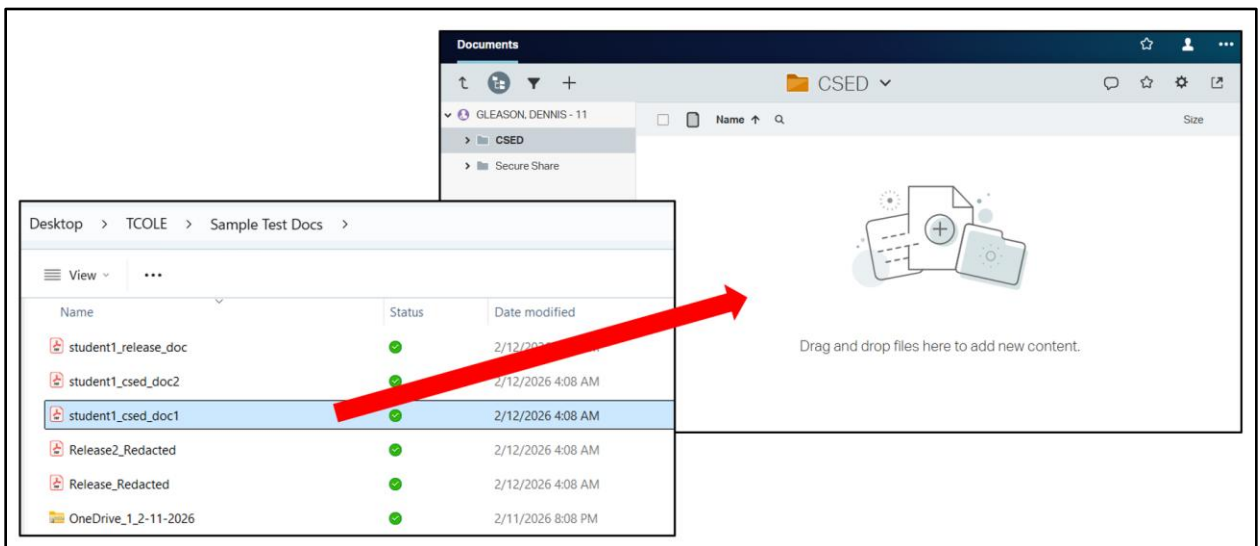
The folders you see depend on your permission. Documents are uploaded directly to these folders.

13. Click the folder name (for example, *CSED*).

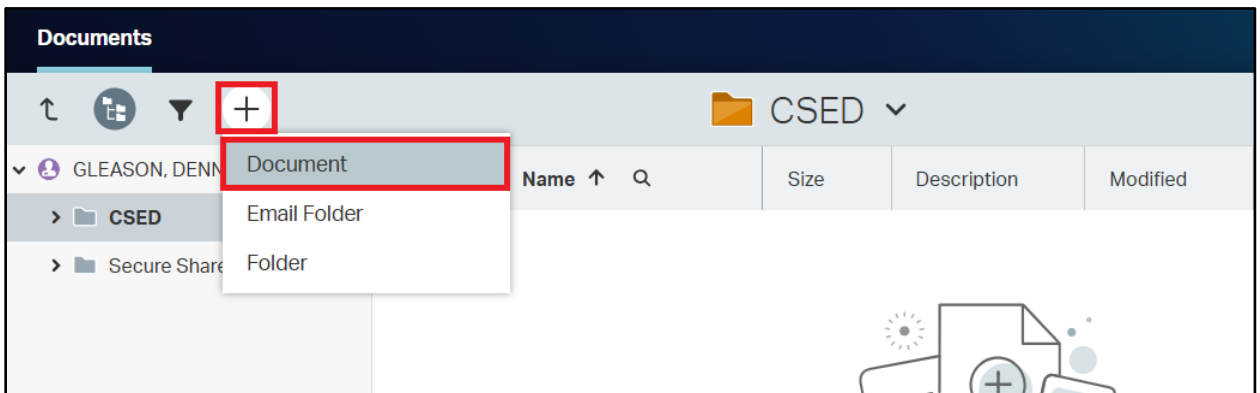


14. Upload documents using one of the following:

- Drag-and-drop directly into the folder
- **Add Item** → **Document** option



Or



15. For each document, select the appropriate document type (required) and document date (optional).

Upload file

student1_csed_doc1.pdf

General Records Management ***CSED Document Details** +

CSED Document Details Only required fields (*)

*Document Type None

Document Date None

- Commendations & Awards
- Final Disciplinary Actions
- Misconduct Investigation Reports (MIR)
- Other
- Periodic Performance Evaluations

Upload Cancel

16. Click **Upload**.

Upload file

student1_csed_doc1.pdf

General Records Management ***CSED Document Details** +

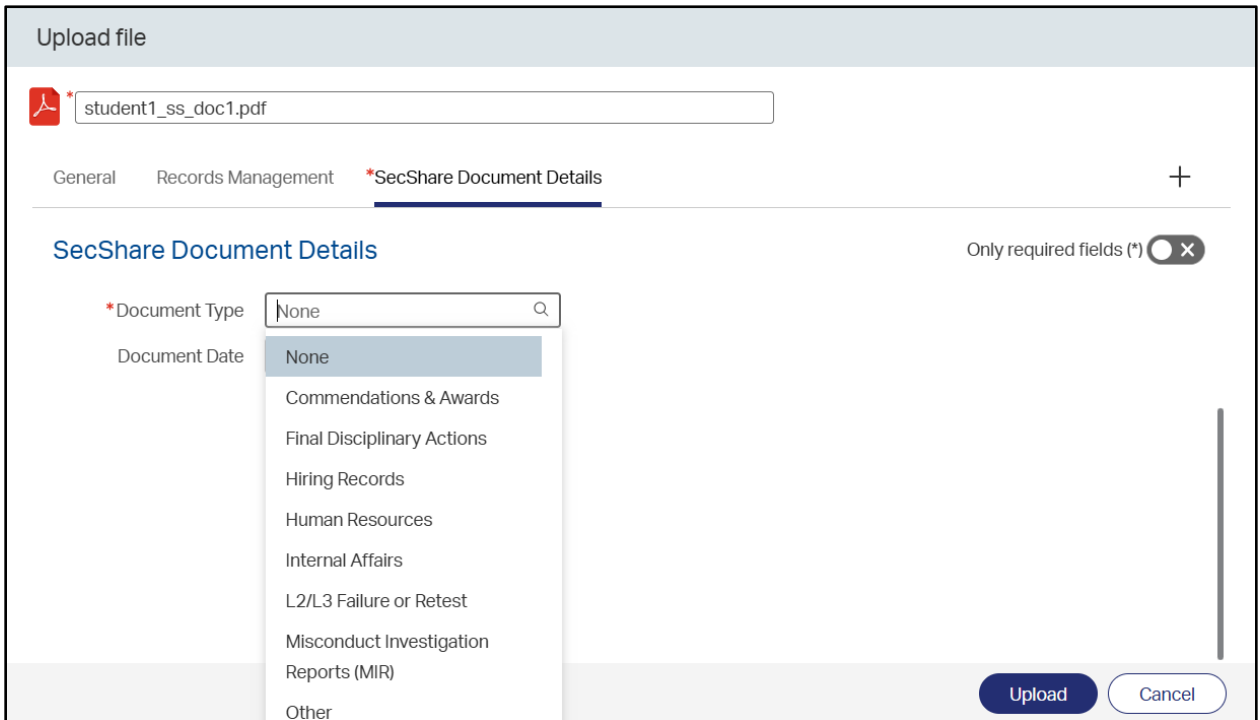
CSED Document Details Only required fields (*)

*Document Type Commendations & Awards

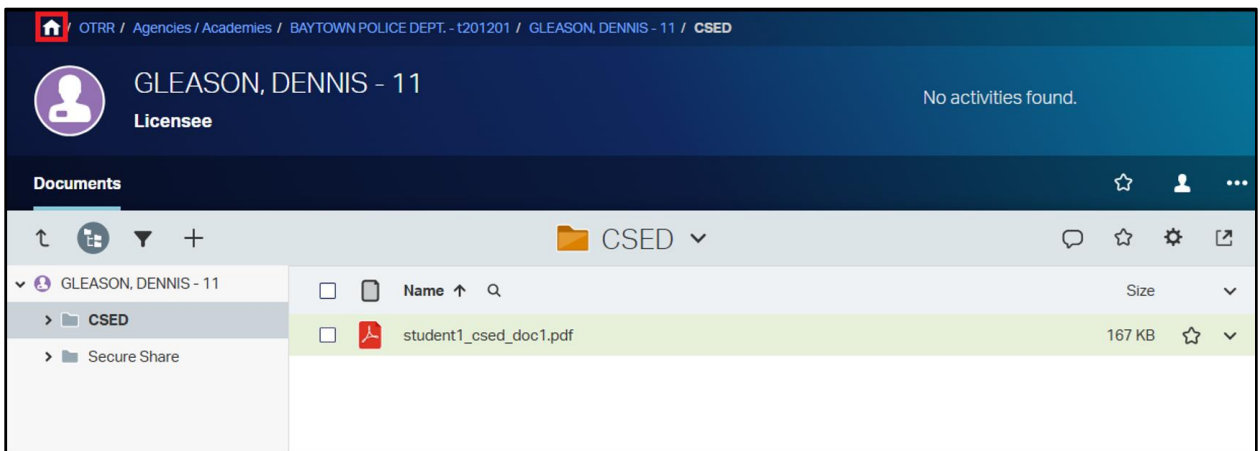
Document Date 01/01/2026

Upload Cancel

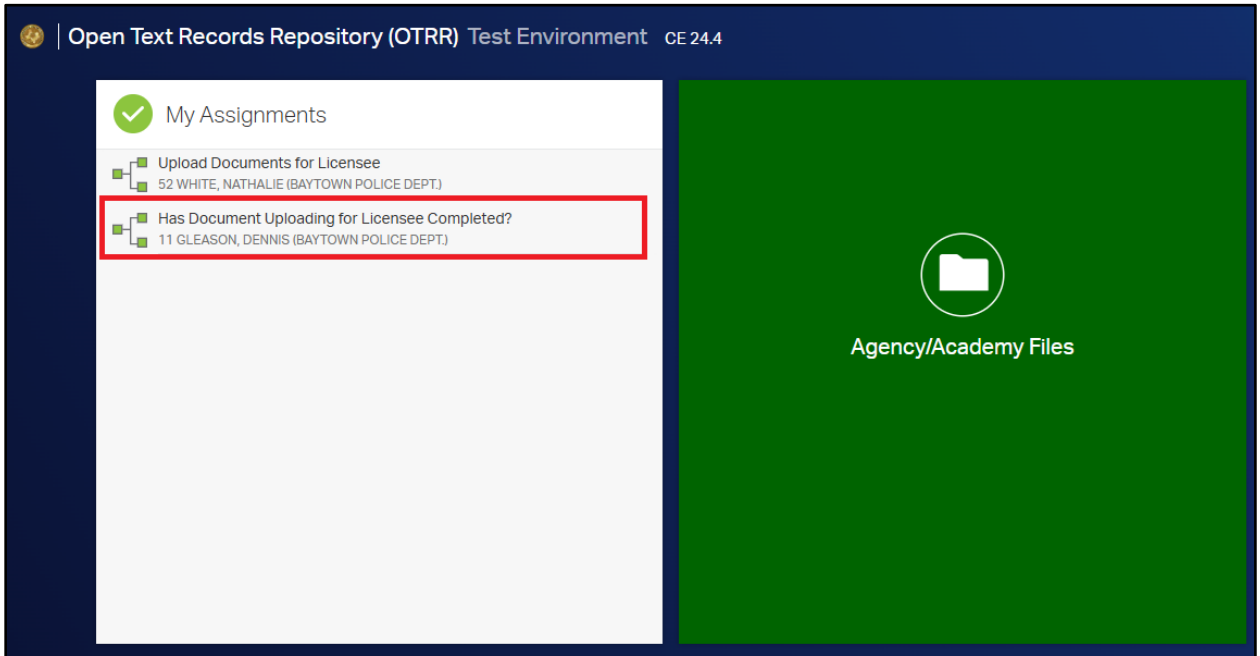
Note: When uploading documents to the *Secure Share* folder, you'll see a different list of document types to select from:



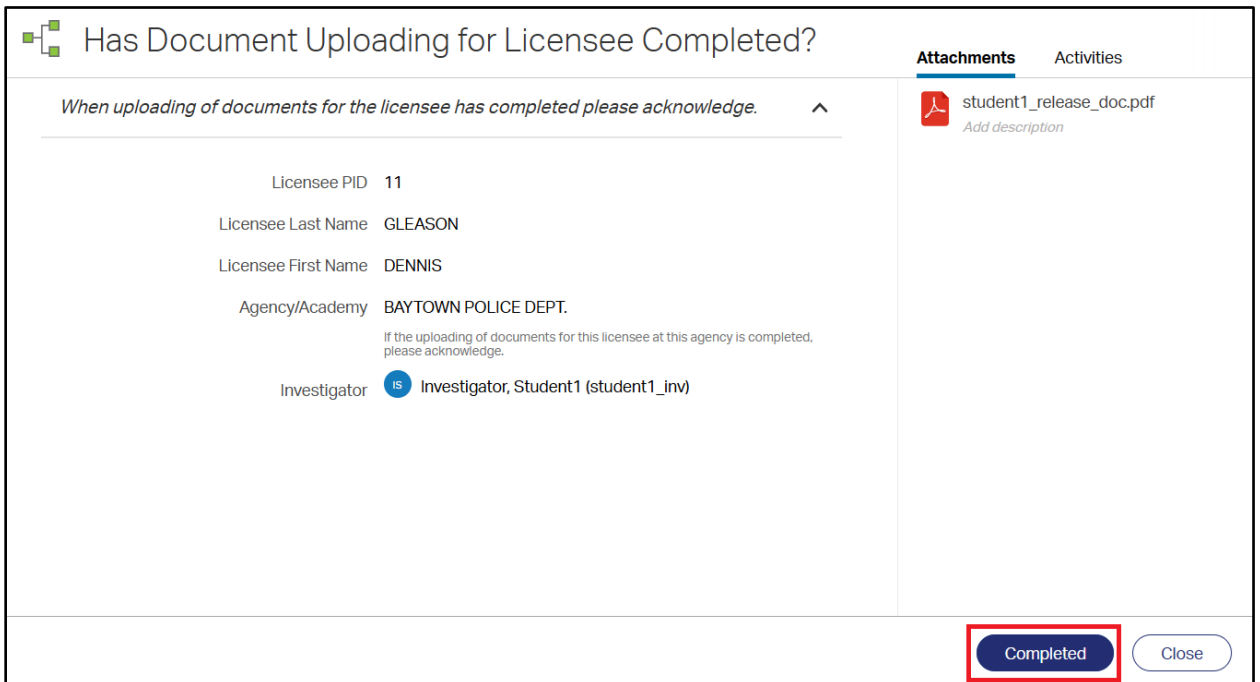
17. Click the Home icon to return to your Home Page.



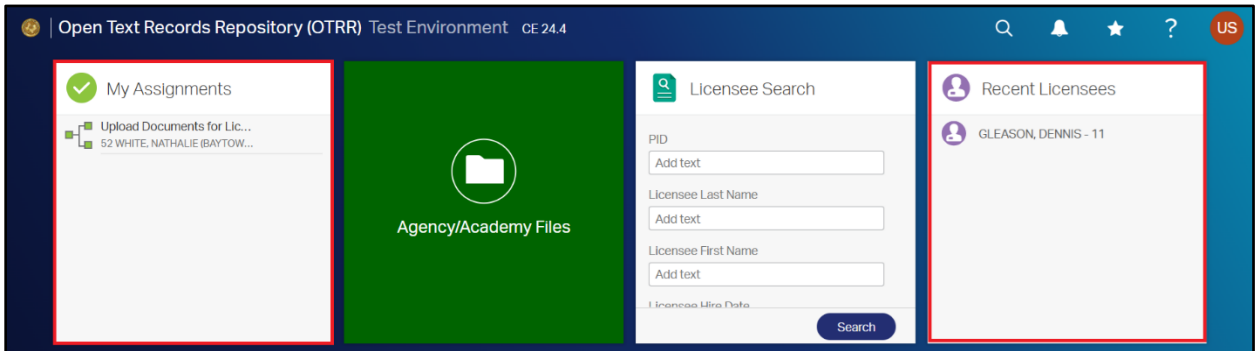
18. From **My Assignments**, click the **Has Document Uploading for Licensee Completed?** task.



19. Click **Completed** to complete the task.



The task is removed from your **My Assignments** tile.



OTRR automatically notifies the investigator/recruiter and grants them temporary read-only access to the uploaded documents. Their access is removed once they complete their review.

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