

## WIOAPOD Desk Aide

### AOSOS Data Entry Requirements

**1. Documenting Academic, career readiness and supportive service needs:**

- a. **Requirement:** Assessment processes must include evaluations of: (1) eligibility criteria for Title I programs, (2) academic levels, (3) occupational skills and interests, and (4) supportive service needs.
- b. **Relevant Guidance:** NJWIN 10-16 [Supportive Services](#), [WIOA Title I Supportive Services: Technical Assistance Guide](#), [Assessment Technical assistance guide](#), [AOSOS Technical Guide](#).
- c. The record in AOSOS should reflect the following([AOSOS Technical Guide](#)),

When documenting...	Please enter the following activity....
Initial intake and eligibility assessments	Assessment Interview, Initial Assessment
Basic skills assessments	Literacy Test and/or Math Test
Career interest assessments	Interest Inventory
Occupational skills assessments	Assessment Services – Career Assessment
Supportive service assessments	Supportive Services Assessment

- d. **Recording Assessment results in AOSOS:** follow table 2 of the AOSOS Technical Guide.
- e. **Comment:** should correlate with the activity detailing, date of assessment, type of assessment, tool used for assessment, and result of assessment; if literacy test provider; test tab should also be populated.

**2. Notification of EEO and grievance procedures:**

- **Requirement:** Upon notification of the Equal Employment Opportunity (EEO) and grievance procedures, the customer shall provide a signed acknowledgment confirming receipt of such information. Additionally, proceed to document the EEO activity within AOSOS.
- **Relevant guidance:** NJWIN12-16, WD PY 22-9, [Unified One Stop Career Center Complaint Procedure](#). Local areas should also have a local policy outlining the process for customers to file a complaint.
- **AOSOS Data entry:** To add the EEO Activity, log into customer’s AOSOS record and click “Activity” button located form the bottom of the screen and it you will see a list of all the available activities you can add for that customer.
- It can be found in **Labor Exchange → Other Services → EEO Notification**

**3. Documenting Selective Service Registration:**

- **Requirement:** TEGL 11-11 Change 2 states that “Before enrolling in WIA(WIOA) Title I-funded services, all males, 26 years of age or older, must provide (1) documentation of compliance with the Selective Service registration requirement; (2) documentation showing they were not required to register; or (3) if they were

required to but did not register, documentation establishing that their failure to register was not knowing and willful" through a local policy.

- **Relevant guidance:** WD-PY 24-11 pg. 4, [Title I Adult, Dislocated Worker, and Youth Eligibility, TEGL 11-11, Change 2](#), local area policy.
- **AOSOS Data Entry:** The Selective Service section **only** appears on "Male" records. When expending funds in the services module for male customers, this must be completed. Males born on or after January 1, 1960, must register for selective service. The flag must be indicated. Many programs, including Title 1, will require the Selective Service number. There is a simple drop-down arrow which can be used to indicate whether the customer is registered for Selective Service or not. If a customer is registered, you can choose "Yes", and you will see field for Selective Service Number becomes active and there would be a "register/Lookup" button through which you can find/verify their status.
- **Comments:** If a customer is not registered, local area policies must require documentation of this fact. In such cases, you can simply add a comment by clicking the "Comment" button located at the bottom and including the relevant information.

#### 4. **Documenting Low Income:**

- **Requirement:** WIOA Adults must be served according to the Adult Priority of Service requirements which includes low income individuals.
- **Relevant guidance:** TEGL 21-16, WD-PY 24-1, [Title I Adult, Dislocated Worker, and Youth Eligibility, Lower Living Standard Income Level Guidelines](#).
- **AOSOS Data Entry:** The **Eligibility** tab collects information regarding low income. The lower living standard, Income 70% LLSL, 5% Rule/Local Poverty and High Poverty Area fields collect the information regarding to lower income at the time of service. Staff can simply choose the drop-down arrow indicate their answer and choose from "Yes", "No" and 'Not Disclosed".

#### 5. **Basic Skills Deficiency:**

- **Requirement:** WIOA Adults must be served according to the Adult Priority of Service requirements which includes Basic Skills Deficient. Local areas should address the BSD and incorporate this option into their ITA policies in collaboration with Title II partners.
- **Relevant guidance:**, WD-PY 24-1 [Title I Adult, Dislocated Worker, and Youth Eligibility](#), WD-PY 25-6.1 [Individual Training Accounts, TEGL 19-16 Attachment III](#), LMS training, "NJDOA AOSOS Next Gen - Comp Assess"
- **AOSOS Data Entry:** It can be found in **Comp Assess → Education** subtab, addresses educational needs and current levels. If it is determined that a customer has a Basic Skills Deficiency or a Low Literacy Level, this can be indicated by selecting the appropriate option from the dropdown menu: "No," "Yes - Basic Skills Deficient," "Yes - Low Level of Literacy," or "Both."
- Local areas should provide information in their IEP/ISS on how they will address the BSD deficiency.

#### 6. **Creating and updating IEPs for Adult/DW/Youth:**

- **Requirement:** An IEP is required before a participant can receive any of the career services that involve a direct allocation of workforce WIOA funds including a training service. The IEP can be updated regularly as the participant progresses in service delivery and career pathway. The **IEP** must "identify the employment goals, appropriate achievement objectives, appropriate combination of services for the participant to achieve the employment goals, including providing information on eligible providers of training services pursuant to paragraph (3)(F)(ii), and career pathways to attain career objectives."
- **Relevant guidance:** NJWIN 19-8 [Individual Employment Plan \(IEP\)](#), NJWIN 19-7 [WIOA Youth Individual Service Strategy](#), [AOSOS Technical Guide](#), LMS Training "NJDOA AOSOS Next Gen - Customer Module"

- **AOSOS Data Entry:** [AOSOS Technical Guide](#)

- Table 4

When documenting...	Please enter the following activity....
One-on-one engagement in reviewing assessment results and developing an IEP or ISS	Counseling – Individual & Career Planning <sup>5</sup>
The creation of or updates to an IEP or ISS	Individual Employment Plan

- Table 5

Goals and Objectives	AOSOS Module	AOSOS Tab	Details
Education and Employment Goals	Customer Detail	Objective	Details about education and employment goals included in the IEP and ISS must be documented in the “Employment Objective” field. This narrative must include details about relevant short-term and long-term goals, as well as career pathways.
Planned Actions/ Services	Services	Achievement Objectives	An IEP and ISS must include details about planned service elements related to education and employment goals. The “Employment Objective” field in the Achievement Objectives tab includes goals entered in Customer Detail. Each unique service element must be documented as an individual Achievement Objective. These entries support tracking planned vs. actual service engagement.

- The Employment Plan tab is designed to help create a basic employment plan for every customer who visits the One Stop center. Each customer goes through an initial assessment to determine their employment goals, identify obstacles, and outline steps needed to reach those goals. The tab includes sections for next actions and a customer signature. It is completed with the customer, either in-person or online, and can be sent electronically or printed for them. The signature section includes dates to confirm that the customer received a copy. The plan evolves with each visit, adding new actions, follow-up dates, and comments. To input data, you click the Add button to open fields for entry. To view an existing plan, click the creation date to display the information.
- **Comments:** document additional details about engagement and interaction specifically capturing details about the nature of the conversation and engagement. Specifically, Comments must include details documenting changes to the IEP or ISS and the reasons for changes – including changes in goals, barriers, and/or services planned.

## 7. **Creating proper achievement objectives connected to funded services:**

- **Requirement:** Each unique service element must be documented as an individual Achievement Objective. These entries support tracking planned vs. actual service engagement.
- **Relevant guidance:** [AOSOS Technical Guide](#)
- **AOSOS Data Entry:** To enter information in the **Achievement Objectives** tab, start by clicking **New Objective** at the bottom. This will open all the fields above for entry. The green dotted fields are required in order to save this tab; however, it is also important to complete the “Type of Goal” and “Goal Attainment”. The Achievement Objective text box should clearly convey a single goal. Sometimes that goal may be to complete a certain class or grade. Sometimes it may be to complete an internship or an OJT (On the Job Training). This goal must be something that can be measured and not something arbitrary such as “To get an understanding of...”. That is certainly not measurable. Multiple goals can be set by simply clicking **New Objective** again to provide a second line. Always remember to save this tab before moving on.

## 8. **Adding information to provide context on the funded service in AOSOS.**

- a. **Requirement:** Local areas must provide context around the funded service. E.g., WEX and/or Tutoring.
- b. **Relevant Guidance:** [AOSOS Technical Guide](#) pg. 16
- c. **Data Entry:** Details about the provision of the actual service must be recorded in the Outcome/Status field in the Achievement Objectives tab (once the Achievement Objective is connected to a service provided). In particular, specific details about work experience, supportive services, and/or follow-up must be entered in this field in the attached Achievement Objective information.

**9. Justification for training services including whether other sources of funding were explored including Pell Grant/FAFSA**

- a. **Requirement:** the identification of a training need, the training area of focus, and a specific training provider must be informed by the individual skills, needs, and interests of each participant as part of initial career planning and the development of the customer's IEP, in order to justify support of the training with an ITA. Relevant information related to training eligibility must be documented in the IEP including the reasoning why the customer is suitable for training.  
Training Services may be provided after a One Stop partner conducts an interview, evaluation, or assessment and conducts career planning. Participants are eligible for training services if they meet all of the following conditions:
  - i. Are in need of training to obtain or retain employment at a self-sustaining wage,
  - ii. Have the pre-requisite skills and qualifications to succeed in training,
  - iii. Have selected training that aligns with in demand occupations, and
  - iv. Are unable to access other sources to pay for the costs of training.
  - v. Adults must be served according to the Adult Priority of Service requirements.
- b. **Relevant guidance:** WD-PY 25-6.1 [Individual Training Accounts](#), WD-PY 24-1 [Title I Adult, Dislocated Worker, and Youth Eligibility](#), [Adult Dislocated Worker Guidelines](#), local area policy.
- c. **AOSOS Data Entry:** Select yes or no in Comp Assess-Education under Pell Grant Recipient and show how to edit exiting IEP.
- d. **Comments:** Case notes document the customer's inability to obtain other grant assistance or why they require WIOA assistance in addition to other sources.

**10. Funded Services Discrepancies**

- a. **Requirement:** Specific Individualized Career Services, Training Services, and Supportive Services must be captured in the Services tab in the Services module in AOSOS as a same-day or multi-day service.
- b. **Relevant guidance:** [AOSOS Technical Guide](#) pg13, Table 6 & Table 7
- c. **Data Entry:** funded services must be tied to an achievement objective. Training and WEX are the only services expected to be funded long term (max one year).
- d. To ensure that a participant is actively engaged in services, local areas must ensure that a counseling touch point occurs minimally every quarter and that a corresponding "Counseling – Individual and Career Planning" activity, and comment with details about the interaction, are entered in AOSOS comments each time.
- e. Details about the provision of the actual service must be recorded in the Outcome/Status field in the Achievement Objectives tab (once the Achievement Objective is connected to a service provided). In particular, specific details about work experience, supportive services, and/or follow-up must be entered in this field in the attached Achievement Objective information.

**11. The proper use of the Counseling tab:**

- a. **Requirement:** Counseling statements must be used to record confidential and sensitive information related to assessment and eligibility. This includes logging sensitive information associated with ongoing assessment that may arise at different points in time during an individual's active service period. This includes details related to: personal health, family health, legal, UI fraud concerns, and/or anything else that the client may not feel comfortable sharing beyond their counselor. For the most part, general career assessments and expressed training interests unrelated to training eligibility and justification may be noted in Comp Assess comments (see below).
- b. **Relevant guidance:** [AOSOS Technical Guide](#) Table 3, LMS Training "*NJDOL AOSOS Next Gen - Secure Counseling*"
- c. **Accessing the counseling tab in AOSOS:** It can be accessed through "Custom Tab" from Comp Assess. It is only accessible to select staff who perform counseling and related duties. Confidential information applicable to the case may be entered here.

**12. The difference between Funded follow up and the follow up attempted activity; for youth, the 5 allowable elements during follow up:**

- a. **Requirement:** Follow-up services must be offered and provided as appropriate for participants after exit from Title I services for at least 12 months after exit. The exit date is determined when the participant has not received services in any of DOL-funded programs in which the participant is enrolled and co-enrolled for 90 consecutive days and is not scheduled for any future staff-assisted services. At that point, the date of exit is applied retroactively to the last date of service. Follow-up may be conducted by telephone, in person, via e-mail (or other social media), or by written correspondence. Follow up Services are intentional, individualized, success-oriented.
- b. **Relevant guidance:** PY 21-5 [WIOA Title I Placement, Exit, and Follow-up Policy](#), [AOSOS Technical Guide](#) (section 5), [Youth Program Elements Technical Assistance Guide](#), local area policy.
- c. **AOSOS Data Entry:** Use the "Follow-up attempted" activity when a specific attempt to follow-up with a customer is made. If contact is unsuccessful, then take the "follow-up activity" and provide a comment reflect the attempt. If contact is made but follow up services as described (PY 21-5 [WIOA Title I Placement, Exit, and Follow-up Policy](#), pg. 8) are not provided, only take the follow-up activity.
- d. The following activities are important but do not fulfil the follow-up requirement and cannot be funded if only offered these services. Providers can only take the follow-up attempted activity.
  - i. Contacting individuals or employers to verify employment;
  - ii. Providing individuals with generalized information about additional educational or employment opportunities; and
  - iii. Leaving voicemails or other evidence of contact that don't result in individualized service
- e. **The following activities do fulfill the follow-up requirement and a follow-up service can be funded.**
  - i. Counseling individuals about the workplace;
  - ii. Contacting individuals or employers to help secure better paying jobs; additional career planning, and counseling for the individual;
  - iii. Assisting individuals and employers in resolving work-related problems;
  - iv. Connecting individuals to peer support groups;
  - v. Providing individuals with referrals to other community resources.
  - vi. Providing individualized information about additional educational or employment opportunities
- f. **Comments:** provide detail as to the nature of the follow-up service including; discussions and specific service offered during the follow up.
- g. **Youth Program and Follow-up.**

**i. Requirement:** the following program elements are allowable during the follow-up phase of service provision:

1. Supportive services;
2. Adult mentoring;
3. Financial literacy education;
4. Services that provide labor market and employment information about in demand industry sectors or occupations available in the local area, such as career awareness, career counseling (including counseling about the workplace as appropriate), and career exploration services; and
5. Activities that help youth prepare for and transition to post-secondary education and training.

**h. Data Entry:** providers can fund these program elements during the follow-up phase; coding it correctly so it does not extend services.