

	New Jersey Workforce Innovation Notice		WD-PY21-1
	Issued By:	Workforce Development Division of Career Services	
	Approved By:	Hugh Bailey, Assistant Commissioner Workforce Development	
	Issued Date:	July 16, 2021	

SUBJECT: Data Entry of *SkillUp New Jersey*/Metrix Learning registrants as WIOA Reportables and designation of *SkillUp* activities

PURPOSE: To provide guidance to New Jersey Workforce Development Boards, One-Stop Career Centers, and One-Stop Partners regarding the entry of data from Metrix Learning into AOSOS to record engagement with *SkillUp New Jersey* and other local *SkillUp* efforts.

EFFECTIVE DATE: This NJWIN is effective **Immediately**.

BACKGROUND: The New Jersey Department of Labor (NJDOLE) is rolling out a new initiative, *SkillUp New Jersey* (<https://nj.metrixlearning.com/>) across the state, which provides access to an array of online courses via the Metrix Learning platform. This resource is available, at no cost, to all residents in New Jersey and Local Workforce Development Boards to support prospective and existing customers. We are issuing this policy to offer specific guidance for local areas about this rollout, as well as specific expectations on entering information into America's One-Stop Operating System (AOSOS), about those who register for *SkillUp NJ* or with a local *SkillUp* site and begin taking courses on the Metrix Learning platform in your local area.

SkillUp/Metrix Learning Overview

SkillUp New Jersey is offering Metrix Learning as a self-directed career service which means that an individual's engagement with this platform will not trigger participation. However, we do hope that this offers a resource for supporting individuals in our workforce system at every level of service engagement - self-directed services, basic career services, individualized career services, and training services.

The platform offers a number of courses that strengthen career and workplace readiness, that can increase skills and knowledge to support the success of residents in their careers – whether connecting to new employment or upskilling in a current job. Some courses available through the Metrix Learning platform may enable an individual to become prepared to take a test/exam to obtain an industry-specific credential. Please refer to the Employment Training Provider List (ETPL) to explore the New York Wired for Education¹ offerings that are categorized as training services for WIOA Title I participants to be included in WIOA performance measures for Credential Attainment and Measurable Skill Gains.

¹ New York Wired for Education is an eTraining company solely focused on the needs of the public workforce training and development market, through a combination of eLearning technology, instructor-led training, and customized training development.

Below, we provide some specific examples of what integration of Metrix Learning may look like at different levels of engagement within our New Jersey workforce system.

Level of Workforce Engagement	Potential <i>SkillUp New Jersey</i> / Metrix Learning Engagement	WIOA Status
New Jersey resident – not currently connected to the system	Any New Jersey resident can self-register and take courses using the Metrix Learning platform via <i>SkillUp New Jersey</i>	WIOA Reportable
Unemployment Insurance recipient – not connected to WIOA programs	Unemployment Insurance recipients, as New Jersey residents, can self-register and take courses using the Metrix Learning platform via <i>SkillUp New Jersey</i>	WIOA Reportable
Individual engaged in Basic Career Services	Employment Services staff may assist participants in connecting to and utilizing tools and courses available through the Metrix Learning platform via <i>SkillUp New Jersey</i>	WIOA Participant (Wagner-Peyser)
Individual engaged in Individual Career Services	Local Workforce Development Board staff may work with participants to identify how tools and courses available through the Metrix Learning platform via <i>SkillUp New Jersey</i> , can enhance a participant's service strategy or employment plan	WIOA Participant (Title I)

Again, it is important to note that engagement with Metrix Learning does **not** in and of itself, trigger any changes in a customer's service level with the exception of initiating engagement as a WIOA Reportable among individuals who have not previously been connected to New Jersey's WIOA programs.

SkillUp/Metrix Learning AOSOS Data Entry

NJDOL is working on future plans to automate connections between Metrix Learning sign-ups via *SkillUp New Jersey* to AOSOS. However, in the interim, we are requesting that local areas work with the state to ensure that *SkillUp* registrations are entered into our AOSOS system. This data entry will help to ensure that we capture the virtual service being provided and accessed by these individuals so that it is accurately reported to the United States Department of Labor (USDOL) via the Participant Individual Record Layout (PIRL). It is also accounting for the investment that the state is making in this platform to support jobseekers in New Jersey and connect more individuals to our state and local workforce systems. Collecting such information allows NJDOL to identify the individuals who have been engaged with the system on an initial level, but did not meet and/or complete the requirements to become WIOA Participants.

Our rollout efforts include a few different scenarios on how Metrix Learning information and AOSOS information can be connected, depending on whether *SkillUp New Jersey* has been rolled out via the link to the state site or the link to localized *SkillUp* efforts and portals. The table on the next page provides an overview of these different scenarios.

One key point to highlight is that the activity that should be entered is different for those individuals registering via *SkillUp New Jersey* versus those registering via local *SkillUp* portals.

Scenario	Metrix Report data used to search AOSOS	Steps for data entry in AOSOS
Individual with an existing AOSOS record who registered via <i>SkillUp New Jersey</i> using a customized registration link	AOSOS IDs are included on Metrix Learning reports for these individuals	<ul style="list-style-type: none"> • Pull up AOSOS record • Verify data in AOSOS matches Metrix • Enter activity: <i>Metrix/SkillUp NJ – Customer</i>
Individual with an existing AOSOS record who registered via <i>SkillUp New Jersey</i> portal	Registration information including email address, first name, last name, and birth date from Metrix Learning reports should be used to search AOSOS to see if there is an existing record in the AOSOS system. Please try multiple searches, using varying combinations of the registration information to ensure as high a match rate as possible.	<ul style="list-style-type: none"> • Pull up AOSOS record • Verify data in AOSOS matches Metrix • Enter activity: <i>Metrix/SkillUp NJ – Customer</i>
Individual with an existing AOSOS record who registered via local <i>SkillUp</i> portal		<ul style="list-style-type: none"> • Pull up AOSOS record • Verify data in AOSOS matches Metrix • Enter activity: <i>SkillUp Participant*</i>
Individual with no AOSOS record who registered via <i>SkillUp New Jersey</i> portal		<ul style="list-style-type: none"> • Create a new AOSOS record with Metrix Learning registration information • Enter activity: <i>Metrix/SkillUp NJ – Customer</i>
Individual with no AOSOS record who registered via local <i>SkillUp</i> portal		<ul style="list-style-type: none"> • Create a new AOSOS record with Metrix Learning registration information • Enter activity: <i>SkillUp Participant*</i>

* Please note, although the word, “Participant”, is in the name of the activity, entering this activity alone, on an individual’s AOSOS record will not trigger participation. It will not make this individual a WIOA Participant, if they are not already a WIOA Participant.

AOSOS Roadmap

The following AOSOS roadmap provides an overview of the specific fields that need to have data entered (indicated with green dots in AOSOS) in order for the individual’s engagement in Metrix Learning to be included on the PIRL as a WIOA Reportable Individual. This policy also includes a number of attachments and screen shots highlighting specifics in the table below.

While all of these fields must be completed, not all of this information is available via the Metrix Learning registration data. For that reason, we have created this roadmap that provides a field-by-field overview of what values should be entered. In many cases, data entry will include selection of a “Not Disclosed” answer, and/or we are recommending a specific default value for entry.

If you are creating a new record, please transfer as much of the information from the Metrix Learning registration data that you can. You will need to start the process by clicking, “New”, to create a new record in AOSOS.

If you are adding to an existing AOSOS record, please do **not** change/overwrite any information that already exists in the record. However, if the Metrix Learning registration data are real values, other than “Declined to answer”, and a value is not present in the corresponding AOSOS field, please do use this to update the record.

AOSOS – Customer Detail		
Tab	Field	Data Entry Guidance
General Info	SSN	Select checkbox for “Not Disclosed”
	Job Seeker*	Enter value “Inactive”
	Username	Create and enter a username that consists of the first 4 letters of the First Name, first 4 letters of the Last Name, followed by 4 random numbers (e.g. firslast1234)
	Password	Create and enter a password (reverse Username) that consists of 4 random numbers, first 4 letters of the First Name, followed by the first 4 letters of Last Name (e.g. 1234firslast)
	Last Name	Enter Metrix Learning information from <i>Last Name</i>
	First Name	Enter Metrix Learning information from <i>First Name</i>
	Date of Birth	Enter Metrix Learning information from <i>Date of Birth</i> <i>If you can determine that the Date of Birth from Metrix is not valid and/or bogus (e.g. 01/01/2021), please do not create a new record in AOSOS for the individual.</i>
	Gender	Enter Metrix Learning information from <i>Gender</i> field OR Enter value “Not Disclosed”
	Address*	Enter “TBU” (To Be Updated)
	City	Enter city based on zip code from the Metrix Learning information from <i>Zip</i> field OR Enter “TBU”
	Zip	Enter Metrix Learning information from <i>Zip</i>
	County	Enter county
	Email	Enter Metrix Learning information from <i>Email Address</i>
	Ethnic Heritage and Race	Enter Metrix Learning information from <i>Race/Ethnicity</i> OR Enter value “Not Disclosed”
	Education Level*	Enter value “No Grade”
	School Status*	Enter value “Not Attending School or Secondary School Dropout”
	Employment Status*	Enter Metrix Learning information from <i>Employment Status</i> OR Enter value “Not Employed”
	Contact Preference*	Select checkbox for “Email”
Eligibility	Lower Living Standard	Enter value “Not Disclosed”
	Income 70% LLSIL	Enter value “Not Disclosed”
	Disability Status	Enter value “Not Disclosed”
	Migrant/Seasonal*	Enter value “No”
	High Poverty Area	Enter value “Not Disclosed” <i>This field is only required if the individual is between the ages of 14 and 24, inclusive; then enter the default value of “Not Disclosed”.</i>
Addl Info	Service Veteran*	Enter value “No” <i>Do not change value to “Yes”, based on Metrix Learning registration data, unless verified in subsequent engagement with customer.</i>
Objective	Employment Objective*	Enter “TBU”
	O*Net Title*	Enter value “27304305” and the system will automatically populate the O*Title: <i>Poets, Lyricists, and Creative Writers</i>
	Acceptable Job Location*	Enter value “New Jersey” in the “Anywhere in the following states” field
Work Hist.	Work History	Select checkbox “No Information Provided”
Ed/Lic	Certificates/Licenses	Select checkbox “No Information Provided”
	Schools	Select checkbox “No Information Provided”
	Professional Associations	Select checkbox “No Information Provided”
Skills	Additional Skills Text*	Enter “TBU”

*These are default values to enter since a “Not Disclosed” option does not exist for the field.

After these fields have been completed, please click the “Save” button in the bottom left corner and an OSOS ID will be generated for the record.

After the record is created and an AOSOS ID is generated, you will need to enter values in the required fields of Comp Assess in order to be able to add and save the activity to the record.

AOSOS – Comp Assess		
Tab	Field	Data Entry Guidance
Employment	Cultural Barriers to Employment	Enter value “Not Disclosed”
	Youth Needing Additional Assistance	Enter value “No” <i>This field is only required if the individual is between the ages of 14 and 24, inclusive; then enter the default value of “No”.</i>
Education	Basic Skills Deficient	Enter value “No”
	English Language Learner	Enter value “No”
Family	Marital Status	Enter value “Not Disclosed”
	Family Status	Enter value “Not Disclosed”
	Is Customer parenting youth?	Enter value “No” <i>This field is only required if the individual is between the ages of 14 and 24, inclusive; then enter the default value of “No”.</i>
Housing	Current Housing	Enter value “Not Disclosed”

After entering the information in Comp Assess, please click the “Save” button in the bottom left corner.

SkillUp Activity Entry/WIOA Reportable Individual Designation

The final step in this process is entering a *SkillUp* activity and designating an individual as a WIOA Reportable Individual by engaging in the following final steps:

1. Click on the “Activity” button.
2. Type “SkillUp” in the Keyword(s) field to search for the *SkillUp* activities and select:
 - a. **Metrix / SkillUp NJ – Customer** - If you are entering an activity on a record of an individual who registered via *SkillUp NJ*.
 - b. **SkillUp Participant** - If you are entering an activity on a record of an individual who registered via a local *SkillUp* portal. (*Please note, although the word, “Participant”, is in the name of the activity, entering this activity alone, on an individual’s AOSOS record will not trigger participation. It will not make this individual a WIOA Participant, if they are not already a WIOA Participant.*)
3. Depending on the report that you are viewing in Metrix Learning, enter Metrix Learning information from the *Added Date* or the *Reg Date* and enter it into the **Activity Date** field in AOSOS.
4. Click the “OK” button at the bottom of the screen.
5. Check the verification screen that pops up for the accuracy of the information entered. This screen includes all the required (“green dot”) fields from the Customer Detail and Comp Assess sections.
6. Click the “Save” button.

This individual is now captured in the system as a *SkillUp* customer and will be included as a WIOA Reportable Individual in our reports to United States Department of Labor.

Please note: For local areas that are directing customers to a local *SkillUp* portal, you may have customers that still register through *SkillUp* New Jersey. The activity that is taken in AOSOS should correspond to whether the individual signed up through your local *SkillUp* effort of *SkillUp* New Jersey.

AOSOS ENTRY / STEP BY STEP

Below are the specifics regarding the required fields (indicated with green dots) and values to enter in AOSOS, in order for the individual's engagement in Metrix Learning to be included on the PIRL as a WIOA Reportable Individual.

As previously stated, while all of the required fields must have values entered, not all of this information is available via Metrix Learning registration data. Below are the values to enter if there is not a value in a field on an existing record in AOSOS or if you are creating a new record in AOSOS.

1. If you are creating a new record, please transfer as much of the information from the Metrix Learning registration data that you can.
2. If you are adding to an existing AOSOS record, please do **not** change/overwrite any information that already exists on the record. However, if the Metrix Learning registration data are real values, other than "Declined to answer", and a value is not present in the corresponding AOSOS field, please do use this to update the record.

STEP 1: Identify the individual in Metrix

In Metrix, go to Administration → Reports → User Registration Detail Report

The screenshot shows the 'Administration - Reports' page in Metrix. The navigation bar includes Home, My Plan, Catalog, My Career, My Account, Help, and Administration. Under 'Administration', there is a 'Tasks' section with a 'Create Custom Report' button. The main content area is titled 'Overall Activity' and lists three report types: 'User Access Reports', 'User Registration', and 'User Registration Detail Report'. A red arrow points to the 'User Registration Detail Report' link, which is described as 'User report of user registration info and activity'.

Identify the individual in Metrix that you want to search for in AOSOS.

The screenshot shows the 'User Registration Detail Report' page in Metrix. The page includes search filters for Start Date (01/19/2021), End Date (05/24/2021), Org (ETI - SkillUp New Jersey), and Location (Other). Below the filters is a table with the following data:

Group	Added	Username	Name	Email	ClientID	Zip	LicAssign	LicExpiration	Provider	Status	Comp	Logins	Courses	Hours	DOB
Other	01/19/21	MelissaTest4077	First Last	emailaddress@email.com		08625	03/24/21	09/20/21	SkillSoft	Manually recycled	0	2	0	0.00	05/05/70

Make a note of the First Name, Last Name, Date of Birth (DOB), and Email Address, as this will be the information from Metrix that you will use to search for the individual in AOSOS.

STEP 2: Search for the individual in AOSOS

Using the information from Metrix, the First Name, Email Address, and Date of Birth (DOB), search for the individual in AOSOS.

Customer Search → **Quick Search** tab

1. Using the fields on the **Quick Search** tab, enter the desired search criteria.
2. **ALWAYS** search thoroughly for a customer **before** creating a new record.
3. Search using multiple criteria, including **Last Name**, **First Name** (or partial first name), **Birth Date**, or **Email**.
4. Searching on the **Last Name** (or partial last name) field will often result in multiple matches that can be narrowed down by using the other fields as desired.

To locate customer records, enter values in the following fields or in combination with one another:

- **Last Name** – Enter the individual’s last name, or a portion of the last name.
- **First Name** – Enter the individual’s first name, or a portion of the first name. The First Name field can only be used as search criteria if a value has been entered in the Last Name field.
- **Middle Initial** – Enter the individual’s middle initial, if available. The Middle Initial field can only be used as search criteria if a value has been entered in the Last Name field.
- **Birth Date** – Enter the individual’s birth date.
- **Email** – Enter the individual’s email address, or a portion of the email address, to locate customer records.

- If a record exists for the individual in AOSOS, then go to **STEP 3: Existing record in AOSOS**.
- If no record was found for the individual in AOSOS after performing a thorough search, then go to **STEP 4: Create a new record in AOSOS**.

NOTE: If you can determine that the Date of Birth from Metrix is not valid and/or bogus (e.g. 01/01/2021), please do not create a new record in AOSOS for the individual.

STEP 3: Existing record in AOSOS

If an existing record is found and returned in the search results, you must verify that the record is in fact the same individual who registered for Metrix Learning on the *SkillUp* site.

Verify the following:

1. First Name in Metrix matches the First Name on the existing AOSOS record; and
2. Last Name in Metrix matches the Last Name on the existing AOSOS record; and
3. Date of Birth in Metrix matches the Date of Birth on the existing AOSOS record; and
4. Email Address in Metrix matches the Email Address on the existing AOSOS record, then go to **STEP 5: Enter the activity in AOSOS**.

OR

1. First Name in Metrix matches the First Name on the existing AOSOS record; and
2. Last Name in Metrix matches the Last Name on the existing AOSOS record; and
3. Date of Birth in Metrix matches the Date of Birth on the existing AOSOS record; and
4. Email Address in Metrix **does not** match the Email Address on the existing AOSOS record, then consider it a match, but do not update or change the Email Address that currently exists on the AOSOS record.
5. Enter a comment with the customer's Email Address that was used in Metrix, then go to **STEP 5: Enter the activity in AOSOS**.



To Summarize:

- If the First Name, Last Name, Date of Birth, and Email Address are exactly the same in both systems (Metrix and AOSOS), then it is a match. Go to **STEP 5: Enter the activity in AOSOS**, to add the activity to the customer's record.
- If the Email Address in Metrix **does not** match what is in AOSOS, but the First Name, Last Name, and Date of Birth are exactly the same in both systems (Metrix and AOSOS), then consider it a match. Do not update or change any data that currently exists on the AOSOS record, including the Email Address. Enter a comment with the customer's email address that was used in Metrix. Then go to **STEP 5: Enter the activity in AOSOS**, to add the activity to the customer's record.

STEP 4: Create a new record in AOSOS

Click the **New** button below the Search Results list.

The screenshot shows the 'Customer Search' window. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and Job Source. The main area contains search criteria for SSN and ID, along with fields for Partial SSN, Last Name, First Name, Middle Initial, Birth Date, Username, Email Exists, and Email. Below this is a table with columns: OSOS ID, Status, Seeker Name, Last Name, First Name, Job Seek, and Cre. At the bottom, there is a toolbar with buttons: Options, Search, Clear, Print, Assign to List, Add to CL, Print Match, Filter, Activity, PIPA, Comments, Correspond, IVR, and New. A red arrow points to the 'New' button.

A blank *Customer Detail* window will appear, allowing you to enter the new customer information.

The screenshot shows the 'Customer Detail' window. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and Job Source. The main area displays customer information. At the top, it shows SSN: and OSOS ID: 1 of 0. Below this are tabs: Gen. Info, Eligibility, Add'l Info, Pgms/PA, Objective, Work Hist., Ed/Lic, Skills, Saved Searches, Activities, Comments, Tests. The main area is divided into sections: Customer Data (SSN, Status, Job Seeker, Username, Password, Last Name, First Name, Date of Birth, Gender, Portfolio Lvl, Address, City, State, Zip, Country, Metro, Phone, Email, URL, U.S. Citizen, Enrollments, JZ/CZ Manager, Add to Case Load), Customer Assignment (Staff Assigned, WIB Assigned, Agency, Office, UI Claimant, Registered, Origin, Profiled, Profiled Date, Internet Resume, Confidential), and Ethnic Heritage & Race. At the bottom, there is a toolbar with buttons: Save, Print Match, Services, Comp Assess, Activity, IA Referrals, Correspond, IVR, Get to Strch, Comments, Tag, Resume, Sched, and Message.

CUSTOMER DETAIL

Customer Detail → Gen. Info tab

The screenshot shows the 'Customer Detail' form in the 'Gen. Info' tab. The form is titled 'Customer Detail' and includes a navigation bar with tabs for 'Gen. Info', 'Eligibility', 'Add'l Info', 'Pgms/PA', 'Objective', 'Work Hist.', 'Ed/Lic', 'Skills', 'Saved Searches', 'Activities', 'Comments', and 'Tests'. The form is for a customer with SSN: ***-**-**** and OSOS ID: 1 of 0. The 'Customer Data' section includes fields for SSN, Status (Active), Job Seeker (Inactive), Username (firslast0000), Password (0000firslast), Last Name (Last), First Name (First), MI, Date of Birth (05/05/1970), Gender (Not Disclosed), Portfolio Lvl., Job Source User, Address (TBU), City (TBU), State (New Jersey), Zip (00000), County, Country (United States), Metro, Phone, Ext., Alt., Fax, Email (emailaddress@email.com), and URL. The 'Ethnic Heritage & Race' section has a checkbox for 'Ethnic Heritage & Race'. The 'Education & Employment' section includes Education Level (No Grade), School Status (Not Attending School or Secondary School Dropout), Employment Status (Not Employed), Underemployed, and Long Term Unemployed. The 'Contact Preferences' section has checkboxes for Use Postal, Fax, Pri. Phone, and Email (checked). The 'Customer Assignment' section includes Staff Assigned (Fox, Melissa), WIB Assigned (NJDDOL Trenton Central Office), Agency (DEPARTMENT OF LABOR), Office (NJDDOL Trenton Central Office), UI Claimant, Registered, Origin (Staff), Profiled, Profiled Date, Internet Resume, and Confidential. The bottom of the form has a status bar with 'Staff: Fox, Melissa', 'Office: NJDDOL Trenton Central Office', 'Unsaved Changes', 'Security: Delete', and '04/20/2021'.

1. **SSN** button – Select checkbox to indicate 'Not Disclosed'.
2. **Ethnic Heritage & Race** button - Select checkboxes to indicate 'Not Disclosed'.
3. **Status** – 'Active' will be selected by default for all new records.
4. **Job Seeker** – Select value, 'Inactive'. Because 'Inactive' is selected, this customer record will not be available for Job Match and Refer operations.
5. **Username** – Create and enter a username that consists of the first 4 letters of the First Name, first 4 letters of the Last Name, followed by 4 random numbers (ex. firslast1234). Must be at least 6 alphanumeric characters in length and spaces are not allowed.
6. **Password** – Create and enter a password (reverse Username) that consists of 4 random numbers, first 4 letters of the First Name, followed by the first 4 letters of Last Name (ex. 1234firslast). Must be at least 6 alphanumeric characters in length (up to 12 characters are permitted). And it must not be the same as the customer's username.
7. **Last Name** - Enter the Last Name from Metrix Learning.
8. **First Name** - Enter the First Name from Metrix Learning.
9. **Gender** - Enter the Gender from Metrix Learning by selecting the appropriate value (*Male* or *Female*) from the dropdown list, or if unknown, select value, 'Not Disclosed'.
10. **Date of Birth** - Enter the Date of Birth from Metrix Learning. *If you can determine that the Date of Birth from Metrix is not valid and/or bogus (eg. 01/01/2021), please do not create a new record in AOSOS for the individual.*
11. **Address** – Enter "TBU".
12. **City** – Enter "TBU", unless you can enter the city based on the zip code in Metrix Learning.
13. **State** – System defaults this field to: New Jersey.
14. **Zip Code** – Enter the Zip from Metrix Learning.
15. **County** – Although this is not a required field, select the name of the county that is associated to the zip code from Metrix Learning.
16. **U.S. Citizen** – System defaults this field to indicate that the customer is a U.S. Citizen.
17. **Education Level** – Select value, 'No Grade'.
18. **School Status** – Select value, 'Not Attending School or Secondary School Dropout'.
19. **Employment Status** – Select value, 'Not Employed'.
20. **Contact Preferences** – Select checkbox to indicate 'Email'.

Customer Detail → **Gen. Info** tab (continued)

Click on the **SSN** button to launch the pop-up window shown below.

1. Select the box next to the **Not Disclosed** field, to indicate the SSN is '*Not Disclosed*'.
2. Click "Ok" to close the window.

NOTE: Customer records without an SSN are **not** excluded from performance measures and reports.

Click on the **Ethnic Heritage & Race** button to launch the pop-up window shown below.

1. For **Ethnic Heritage**, select the radio button to indicate '*Not Disclosed*'.
2. For **Race**, select the checkbox to indicate '*Not Disclosed*'.
3. Click "Ok" to close the window.

NOTE: If information is available in Metrix Learning, then enter the corresponding value in the field(s), otherwise enter '*Not Disclosed*'.

Customer Detail → **Eligibility** tab

Customer Detail Eligibility tab. Fields highlighted in red:

- Lower Living Standard: Not Disclosed
- Income 70% LLSIL: Not Disclosed
- Disability Status: Not Disclosed
- Migrant / Seasonal Worker: No

Callout box instructions:

1. Lower Living Standard - Select value, 'Not Disclosed'.
2. Income 70% LLSIL - Select value, 'Not Disclosed'.
3. Disability Status - Select value, 'Not Disclosed'.
4. Migrant / Seasonal Worker - Select value, 'No'.

NOTE: The **High Poverty Area** field is only required if the customer is 16 - 24 years old, as of the current date and/or as of the date that is being entered for the activity. If required, select value, 'Not Disclosed'.

Customer Detail → **Objective** tab

Customer Detail Objective tab. Fields highlighted in red:

- Employment Objective: TBU
- Desired O*Net: Add a Job Title button
- Desired O*Net: O*Net Title: 27304305
- Acceptable Job Locations: Or Anywhere in the following states: New Jersey

1. **Employment Objective** – Enter “TBU”.
2. **O*Net Title** – Select the **Add a Job Title** button, then click in the **O*Net Titles** field and enter “27304305”. The name of the O*Net Title, “Poets, Lyricists and Creative Writers”, will automatically be populated.
3. **Acceptable Job Locations** – Under the section, “Or Anywhere in the following states”, select the value, ‘New Jersey’.

Customer Detail → Work Hist. tab

Customer Search **Customer Detail** Comp Assess Services Links

Last, First SSN: ***-**-**** OSOS ID: 1 of 0

Gen. Info Eligibility Add'l Info Pgms/PA Objective **Work Hist.** Ed/Lic Skills Saved Searches Activities Comments Tests >>

Detail

Job Title O*Net Code

Employer Include online Start Date End Date

Address Supervisor Phone Ext.

City Wage Hours/week

State Zip Reason for Leaving

Country Job Duties Job Duties

Job Type RR Event# Event

NAICS NAICS Lookup

Job	Company	City	Start	End
<input type="checkbox"/>				

No Information Provided New Job Entry Delete Selection

Save Start Match Services Comp Assess Activity I/A Referrals Correspond IVR Ret to Sroh Comments Tag Resume Sched Message

Staff: Fox, Melissa Office: NJDOL Trenton Central Office Unsaved Changes Security: Delete 04/20/2021

Select the checkbox to indicate 'No Information Provided'.

Customer Detail → Ed/Lic tab

Customer Search **Customer Detail** Comp Assess Services Links

Last, First SSN: ***-**-**** OSOS ID: 1 of 0

Gen. Info Eligibility Add'l Info Pgms/PA Objective Work Hist. **Ed/Lic** Skills Saved Searches Activities Comments Tests >>

Driver License

Yes No Class State

Pass Transport Hazardous Materials Tank Vehicle Motorcycle

School Bus Doubles/Triples Tank Hazard Air Brakes

Certificates / Licenses

Certificate/License	Issue Date	Issuing Organization	State	Country
<input type="checkbox"/>				

No Information Provided Add Cert/Lic Edit Cert/Lic Delete Selection

Schools

Course of Study	Degree	Completed	Issuing Institution	State	Country
<input type="checkbox"/>					

No Information Provided Add School Edit School Delete Selection

Professional Associations

Association Name	Position	Description	Date Received
<input type="checkbox"/>			

No Information Provided Add Association Edit Association Delete Selection Show Full Description

Save Start Match Services Comp Assess Activity I/A Referrals Correspond IVR Ret to Sroh Comments Tag Resume Sched Message

Staff: Fox, Melissa Office: NJDOL Trenton Central Office Unsaved Changes Security: Delete 04/20/2021

For **Certificates/Licenses**, **Schools**, and **Professional Associations**, select the checkbox to indicate 'No Information Provided' for each section.

Customer Detail → Skills tab

The screenshot shows the 'Customer Detail' page for a customer named Melissa Fox. The 'Skills' tab is active, and the 'Additional Skills Text' field contains the text 'TBU'. The status bar at the bottom of the window displays 'Unsaved Changes', indicating that the information entered has not yet been saved to the record.

For the **Additional Skills Text** field, enter “TBU”.

Before saving the information that was entered on Customer Detail to the record:

This screenshot shows the same 'Customer Detail' page, but with the 'OSOS ID' field highlighted by a red circle. The 'Additional Skills Text' field still contains 'TBU'. The status bar at the bottom also has 'Unsaved Changes' circled in red, indicating that the system is aware of the unsaved changes.

Observe that an OSOS ID has not been generated yet, and the system is letting the user know that there are “Unsaved Changes” on the record. At the bottom of the window, there is a status bar which displays information about the user who is currently logged in and indicates if there are unsaved changes. The phrase “Unsaved Changes” will be present.

When ready to save the information entered on Customer Detail to the record, click on the **Save** button.

The screenshot shows the 'Customer Detail' form in a web application. The form is titled 'Customer Detail' and includes tabs for 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. The form contains several sections: 'Additional Skills Text' (with a text area containing 'TBU'), 'Honors & Activities', 'Qualifications', and 'Awards'. Each section has a table with columns for 'Qualification' or 'Award Name' and 'Description'. Below the 'Awards' section, there are buttons for 'Add Award', 'Edit Award', 'Delete Selection', and 'Show Full Description'. At the bottom of the form, there is a 'Save' button, which is highlighted with a red arrow. Other buttons include 'Start Match', 'Services', 'Comp Assess', 'Activity', 'IA Referrals', 'Correspond', 'IVR', 'Ret to Srch', 'Comments', 'Tag', 'Resume', 'Sched', and 'Message'. The status bar at the bottom indicates 'Staff: Fox, Melissa', 'Office: NJDOL Trenton Central Office', 'Unsaved Changes', 'Security: Delete', and '04/20/2021'.

After saving the information that was entered on Customer Detail to the record:

The screenshot shows the 'Customer Detail' form after saving. The 'OSOS ID' field is now populated with 'NJ008646020' and is circled in red. The 'Save' button is also circled in red. The status bar at the bottom now shows 'Security: Delete' instead of 'Unsaved Changes'. The other elements of the form, including the 'Additional Skills Text' section with 'TBU', 'Honors & Activities', 'Qualifications', and 'Awards' sections, remain the same.

NOTE: An OSOS ID is generated by the system when information has been successfully saved to the record. And the status bar will no longer indicate that there are unsaved changes.

COMP ASSESS

Next, go to the Comp Assess section of the record. This section is accessed by clicking the **Comp Assess** button at the bottom of the *Customer Detail* window. The *Comp Assess* section must be completed for each customer.

The screenshot shows the 'Customer Detail' window for a customer with SSN: ***-**-**** and OSOS ID: NJ008646020. The 'Comp Assess' tab is selected in the top navigation bar. The main content area includes sections for 'Additional Skills Text', 'Honors & Activities', 'Qualifications', and 'Awards'. At the bottom, a navigation bar contains buttons for 'Save', 'Start Match', 'Services', 'Comp Assess', 'Activity', 'I.A. Referrals', 'Correspond', 'IVR', 'Ret to Strch', 'Comments', 'Tag', 'Resume', 'Schd', and 'Message'. A red arrow points to the 'Comp Assess' button.

Comp Assess → **Employment** tab

The screenshot shows the 'Customer Detail' window for the same customer, but with the 'Comp Assess' section selected. The 'Employment' tab is active, and the 'Origination Date' field is highlighted with a red circle. The 'Employment Objective' section includes fields for 'Job Title' (Poets, Lyricists and Creative Writers), 'Wage Desired', 'Geographical Location' (New Jersey), and 'Is the customer interested in non-traditional employment?' (Yes/No). The 'Current Employment Status' is 'Not Employed'. The 'Job Behavior and Skills' section includes 'Employment Behavior', 'Job Seeking Skills', and 'Job Keeping Skills'. The 'Summary of Occupational Strengths & Weaknesses' section is also visible.

Observe that a date value is not present in the **Origination Date** field. This lets the user know that the Comp Assess section of this customer's record has never been entered or completed.

Comp Assess → **Employment** tab

The screenshot shows the 'Comp Assess' form for a customer named Melissa Fox. The 'Employment' tab is active. Key fields include:

- Staff Assigned: Fox, Melissa
- Job Title: Poets, Lyricists and Creative Writers
- Geographical Location: New Jersey
- Is the customer interested in non-traditional employment?: Yes (selected)
- Current Employment Status: Not Employed
- Poor Work History?:
- Youth Needing Additional Assistance?:
- Serious Barriers to Employment?:
- Cultural Barriers to Employment?: Not Disclosed (highlighted with a red box)

Cultural Barriers to Employment? – Select value “Not Disclosed”.

NOTE: The **Youth Needing Additional Assistance?** field is only required if the individual is between the ages of 14 and 24, inclusive; if applicable, enter the default value of “No”.

Comp Assess → **Education** tab

The screenshot shows the 'Comp Assess' form for the same customer, now on the 'Education' tab. Key fields include:

- Basic Skills Deficient / Low Levels of Literacy: No (highlighted with a red box)
- English Language Learner: No (highlighted with a red box)
- Education Completed: No Grade
- Current School Status: Not Attending School or Secondary School
- Customer below appropriate grade level?:
- Pell Grant Recipient?:
- Award Amount:
- Any indication of learning disabilities?:
- Learning Disabilities:

1. **Basic Skills Deficient / Low Levels of Literacy** – Select value “No”.
2. **English Language Learner** – Select value “No”.

Comp Assess → **Family** tab

Customer Search Customer Detail **Comp Assess** Services Links Job Source

Last, First SSN: OSOS ID: NJ008646020

<< < Employment Education Financial **Family** Health Treatments Legal Housing Transportation Comments Attachments C > >>

Personal Information

● Marital Status Not Disclosed

Victim of domestic violence? Yes No

● Family Status Not Disclosed

Members of Household

	Name	Relationship	Birth Date	Dep.
<input type="checkbox"/>				

Add a Member Delete Selection

Is Customer parenting youth?

Family Needs

Special needs of household members:

Child care arrangements:

Support from family & friends:

Child Protective Services

Has child protective services ever contacted customer regarding his/h child or children?

Save Customer Detail Services Activity Correspond WIOA Eligibility Summary Comments

Staff: Fox, Melissa Office: NJDOL Trenton Central Office Unsaved Changes Security: Delete 04/20/2021

1. **Marital Status** – Select value, 'Not Disclosed'.
2. **Family Status** – Select value, 'Not Disclosed'.

NOTE: The **Is Customer parenting youth?** field is only required if the individual is between the ages of 14 and 24, inclusive; if applicable, enter the default value of "No".

Comp Assess → **Housing** tab

Customer Search Customer Detail **Comp Assess** Services Links Job Source

Last, First SSN: OSOS ID: NJ008646020

<< < Employment Education Financial Family Health Treatments Legal **Housing** Transportation Comments Attachments C > >>

Housing Information

● Current Housing Not Disclosed

Current Housing (2)

Housing Assistance None

Contact Person

Phone Ext.

Expected Changes

Save Customer Detail Services Activity Correspond WIOA Eligibility Summary Comments

Staff: Fox, Melissa Office: NJDOL Trenton Central Office Unsaved Changes Security: Delete 04/20/2021

Current Housing – Select value, 'Not Disclosed'.

Comp Assess → Employment tab

Before saving the information that was entered on *Comp Assess*, go to the **Employment** tab:

The screenshot shows the 'Employment' tab of the 'Comp Assess' system. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with options like Customer Search, Customer Detail, and Comp Assess. The main content area is divided into several sections: 'Origination Date' and 'Last Update' fields (with 'Origination Date' circled in red), 'Staff Assigned' (Fox, Melissa), 'Employment Objective' (Job Title: Poets, Lyricists and Creative Writers, Wage Desired, Geographical Location: New Jersey), and 'Job Behavior and Skills' (Employment Behavior, Job Seeking Skills, Job Keeping Skills, Summary of Occupational Strengths & Weaknesses). At the bottom, a status bar displays 'Staff: Fox, Melissa', 'Office: NJDOL Trenton Central Office', 'Unsaved Changes' (circled in red), 'Security: Delete', and '04/20/2021'.

Observe that a date value is still not present in the **Origination Date** field. This lets the user know that the *Comp Assess* section of this customer's record has not been entered or completed. And the status bar at the bottom of the window, which displays information about the user who is currently logged in, indicates if there are unsaved changes. The phrase "Unsaved Changes" will be present.

When ready to save the information entered on *Comp Assess* to the record, click on the **Save** button.

This screenshot is identical to the previous one, showing the 'Employment' tab. A red arrow points to the 'Save' button in the bottom navigation bar, which is located between the 'Customer Detail' and 'Services' buttons. The status bar at the bottom still shows 'Unsaved Changes'.

After saving the information that was entered on *Comp Assess* to the record:

The screenshot shows the 'Comp Assess' section of a customer record. The 'Origination Date' field is highlighted with a red circle and contains the value '04/20/2021'. The 'Record Saved' status is also highlighted with a red circle in the top right. The bottom status bar shows 'Staff: Fox, Melissa', 'Office: NJDOL Trenton Central Office', and 'Security: Delete' with a date of '04/20/2021'.

Observe that a date value is now present in the **Origination Date** field. Again, this lets the user know that the *Comp Assess* section of this customer's record has been entered. And the status bar at the bottom of the window, which displays information about the user who is currently logged in, indicates there are no unsaved changes.

Next, go back to the *Customer Detail* section of the record.

The screenshot shows the 'Customer Detail' section of a customer record. A red arrow points to the 'Customer Detail' button in the bottom navigation bar. The 'Record Saved' status is visible in the top right.

This section is accessed by clicking the **Customer Detail** button at the bottom of the *Comp Assess* window.

STEP 5: Enter the activity in AOSOS

From *Customer Detail*, click on the **Activity** button, to begin the process of entering a SkillUp activity and designating an individual as a WIOA Reportable Individual.

The screenshot shows the 'Customer Detail' form in AOSOS. The form is divided into several sections: 'Customer Data', 'Customer Assignment', and 'Education & Employment'. The 'Customer Data' section includes fields for SSN, Username, Last Name, Date of Birth, Gender, Address, City, State, Zip, and Email. The 'Customer Assignment' section includes fields for Staff Assigned, WIB Assigned, Agency, Office, and UI Claimant. The 'Education & Employment' section includes fields for Education Level, School Status, Employment Status, and Contact Preferences. A red arrow points to the 'Activity' button in the bottom navigation bar.

Clicking on the **Activity** button launches the pop-up window shown below:

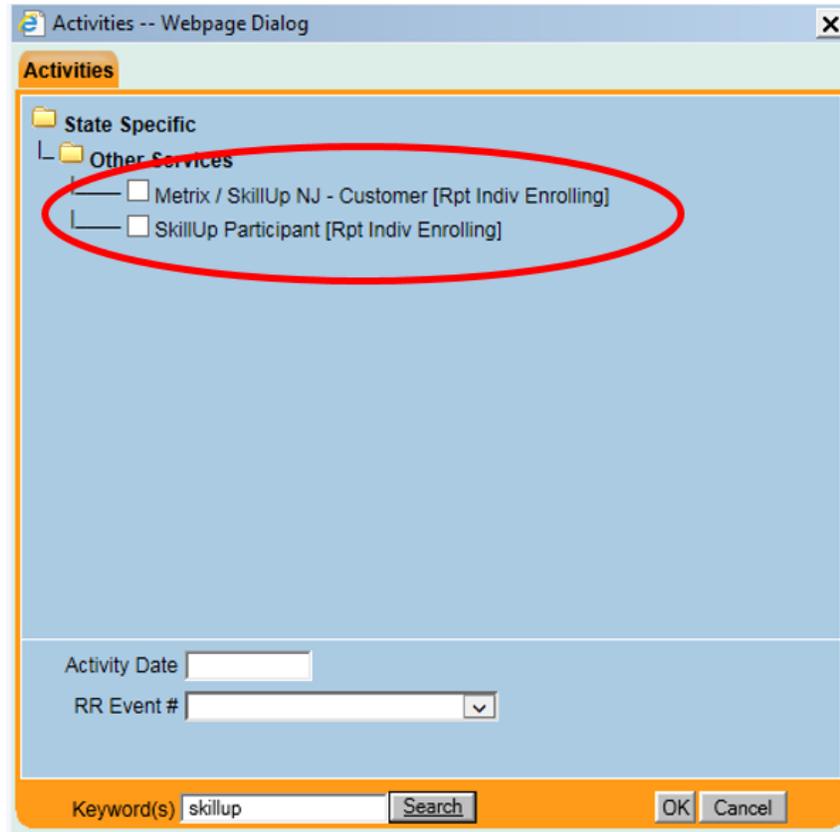
The screenshot shows the 'Activities -- Webpage Dialog' pop-up window. The window has a title bar and a close button. The main content area is titled 'Activities' and contains a list of activity categories: Labor Exchange, Employment & Training, WIOA Basic Career Services (WIA Core), State Specific, Jersey Job Club, RESEA, Trade Act, Veteran Services, WIOA Youth Framework Services, and Workfirst. Below the list are two input fields: 'Activity Date' and 'RR Event #'. At the bottom of the dialog, there is a 'Keyword(s)' field, a 'Search' button, and 'OK' and 'Cancel' buttons.

Type the following text in the **Keyword(s)** field to search for the appropriate activity:

Keyword(s)

Then click on the **Search** button.

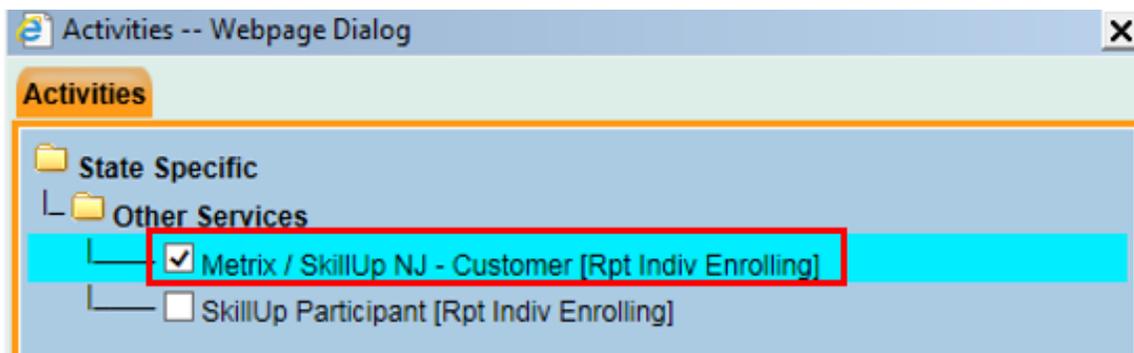
Two activities with the word, “skillup”, in their name will be returned, as shown below.



Select the appropriate activity:

- **Metrix / SkillUp NJ – Customer** - If you are entering an activity on a record of an individual who registered via *SkillUp NJ*.
- **SkillUp Participant** - If you are entering an activity on a record of an individual who registered via a local *SkillUp* portal. (Please note, although the word, “Participant”, is in the name of the activity, entering this activity alone, on an individual’s AOSOS record will not trigger participation. It will not make this individual a WIOA Participant, if they are not already a WIOA Participant.)

For this example, the individual registered on *SkillUp NJ*, so the appropriate activity is **Metrix / SkillUp NJ – Customer**.



Depending on the report that you are viewing in Metrix Learning, use the Metrix Learning information from the *Added* column or the *Reg Date* and enter it into the **Activity Date** field in AOSOS.

The screenshot shows the 'User Registration Detail Report' interface. At the top, there is a navigation bar with links: Home, My Plan, Catalog, My Career, My Account, Help, and Administration. Below the navigation bar, the report title 'User Registration Detail Report' is displayed. There are input fields for 'Start Date' (01/19/2021) and 'End Date' (05/24/2021). Below these are 'Org' (ETI - SkillUp New Jersey) and 'Location' (Other) with an 'update' button. The main part of the report is a table with the following data:

Group	Added	Username	Name	Email	ClientID	Zip	LicAssign	LicExpiration	Provider
Other	01/19/21	MelissaTest4077	First Last	emailaddress@email.com		08625	03/24/21	09/20/21	SkillSoft

Below is the completed *Activities* window:

The screenshot shows the 'Activities -- Webpage Dialog' window. It has a tree view on the left with the following structure:

- State Specific
 - Other Services
 - Metrix / SkillUp NJ - Customer [Rpt Indiv Enrolling]
 - SkillUp Participant [Rpt Indiv Enrolling]

At the bottom of the window, there is an 'Activity Date' field set to '01/19/2021', an 'RR Event #' dropdown menu, and a 'Keyword(s)' field containing 'skillup'. There are 'Search', 'OK', and 'Cancel' buttons at the bottom right. A red arrow points to the 'OK' button.

1. Click in the box next to the desired activity to select it.
2. Enter the date, from the *Added* column or the *Reg Date* in Metrix, in the **Activity Date** field.
3. Click "OK" to close the window.

After clicking on OK, another popup window will appear. This is the verification popup window. This window includes all the required ("green dot") fields from the Customer Detail and Comp Assess sections of the customer's record.

Check the verification window for the accuracy of the information entered.

Review each field on the Customer Detail tab of the verification popup window, to make sure all of the information is correct.

Edit -- Webpage Dialog

Customer Detail | **Comp Assess** | **Audit**

General Information

OSOS ID: NJ008646020 | Seeker Status: Active

Gender: Not Disclosed

U.S. Citizen:

Education Level: No Grade

School Status: Not Attending School or Secondary School

Employment Status: Not Employed

Underemployed:

Long Term Unemployed:

UI Claimant:

Profiled: | Profiled Date:

Ethnic Heritage

Hispanic or Latino

Not Hispanic or Latino

Not Disclosed

Race

Alaskan or American Indian

Asian

Black or African American

Hawaiian or Pacific Islander

White

Not Disclosed

Income & Disability Status

Lower Living Standard: Not Disclosed

Income 70% LLSIL: Not Disclosed

5% Rule/Local Priority:

High Poverty Area:

Disability Status: Not Disclosed

Disability Category

Hearing Vision

Mental Mobility

Cognitive Learning

Chronic Health Not Disclosed

Financial Capability - has a receipt and has received:

Benefit Planning Services

Financial Capability/Asset Develop. Services

Migrant

Migrant / Seasonal Wkr: Yes No

Migrant Class:

Farmwork Type:

Empl. in Farmwork:

Farmwork Threshold:

Military Service

Service Veteran: No

Selective Service?:

Programs

HVRP Grantee:

HVRP Grantee #2:

Reason:

HVRP Grantee #3:

Reason:

Work History

Job Title:

Company:

City:

Start Date: End Date:

Created

Staff: Fox, Melissa

Office: NJDOL Trenton Central Office

Date: 05/24/2021

Program(s) Verified: WIOA Reportable Individual

Last Modified

Staff: Administrator, Middle Tier

Office: NJDOL Trenton Central Office

Date: 05/24/2021

Eligibility Data Effective Date: 01/19/2021

Apply Updates to Customer Record

Apply Eligibility Updates Thru Today: 05/24/2021

Apply Eligibility Updates Thru This Date:

Once all of the information on the Customer Detail tab of the verification popup window has been reviewed and is correct, go to the Comp Assess tab of the popup window and do the same. To access the tab, click on Comp Assess at the top of the window.

Review each field on the Comp Assess tab of the verification popup window, to make sure all of the information is correct.

Edit -- Webpage Dialog

Customer Detail **Comp Assess** **Audit**

Employment

Poor Work History?

Youth Needing Additional Assistance

Serious Barriers to Employment?

● Cultural Barriers to Employment?

Education

● Basic Skills Deficient/Low Levels of Literacy

● English Language Learner?

Customer below appropriate grade level?

Pell Grant Recipient?

Any indication of learning disabilities?

Family

● Marital Status

● Family Status

Is Customer Pregnant?

Delivery Date

Is Customer Parenting Youth?

Legal

Offender Status

Housing

● Current Housing

Current Housing (2)

Created

Staff

Office

Date

Program(s) Verified

Last Modified

Staff

Office

Date

Eligibility Data Effective Date

Apply Updates to Customer Record

Apply Eligibility Updates Thru Today

Apply Eligibility Updates Thru This Date

Once all of the information on the Comp Assess tab of the verification popup window has been reviewed and is correct, click on the “**Save**” button.

The activity has now been saved to the customer’s record.

The activity will appear on the *Activities* tab of the customer's record, after saving.

Activity	Activity Date	Office	Staff	Employer	Job ID	SA	FA
<input type="checkbox"/> New Job Seeker - Staff Assisted	04/20/2021	NJDOL Trenton Ce	Fox, Melissa				No
<input type="checkbox"/> Metrix / SkillUp NJ - Customer	01/19/2021	NJDOL Trenton Ce	Fox, Melissa				No

Go to the **Pgms/PA** tab on the customer's record, to view the current programs that they are enrolled.

Program	Reg Date	Term Date
<input type="checkbox"/> TANF (PIRL)		
<input type="checkbox"/> TANF Applicant		
<input type="checkbox"/> TANF Exhausting within 2 Years (PIRL)		
<input type="checkbox"/> GA Applicant		
<input type="checkbox"/> GA - General Assistance (State/Local) (PIRL)		
<input type="checkbox"/> SNAP / Food Stamps (PIRL)		
<input type="checkbox"/> Food Stamps (ABAWD)		
<input type="checkbox"/> Foster Child Payments (PIRL)		
<input type="checkbox"/> Russell Nat'l School Lunch Act (PIRL)		
<input type="checkbox"/> SSI - Supplemental Security Income Title XVI (PIRL)		
<input type="checkbox"/> SSDI - Social Security Disability Insurance (PIRL)		
<input type="checkbox"/> USDA Commodity Program (PIRL)		
Current Programs		
<input type="checkbox"/> WIOA Participation Period		
<input checked="" type="checkbox"/> WIOA Reportable Individual	01/19/2021	01/19/2021
<input type="checkbox"/> Wagner-Peyser		
<input type="checkbox"/> WIOA - Adult		
<input type="checkbox"/> WIOA - Dislocated Worker		
<input type="checkbox"/> WIOA - Youth		

Staff: Fox, Melissa Office: NJDOL Trenton Central Office Security: Delete 05/24/2021

This individual is now captured in the system as a *SkillUp* customer and will be included as a WIOA Reportable Individual in our reports to United States Department of Labor.

STEP 6: Add the AOSOS ID to Metrix

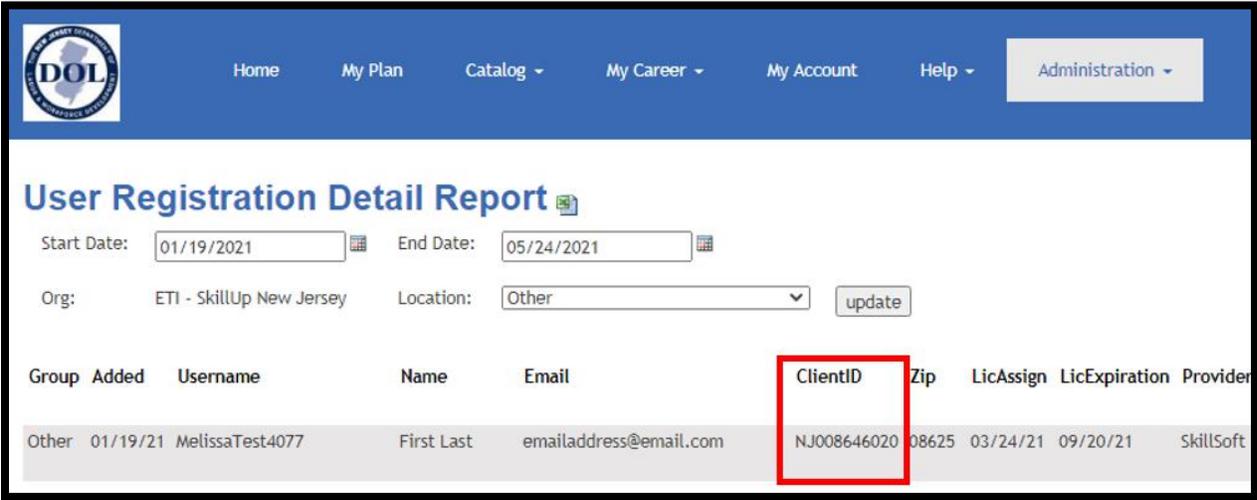
Add the AOSOS ID to the individual's user account in Metrix.

NOTE: Only staff admin. user accounts with an access level of *Manager* are authorized to enter the AOSOS ID on an individual's user account in *SkillUp NJ*.

In Metrix:

1. Go to Administration → Users and Groups → Edit Users.
2. Find the individual's user account and click on their *User Name*. It will bring you directly to the Basic Information section of their user account.
3. Enter the AOSOS ID in the *Internal ID* field.
4. Click on **Save**.

The AOSOS ID will now appear in the **ClientID** column, on the *User Registration Detail Report* as shown below:



The screenshot shows the Metrix interface with the 'User Registration Detail Report' displayed. The report includes a table with columns for Group, Added, Username, Name, Email, ClientID, Zip, LicAssign, LicExpiration, and Provider. The ClientID value 'NJ008646020' is highlighted with a red box.

Group	Added	Username	Name	Email	ClientID	Zip	LicAssign	LicExpiration	Provider
Other	01/19/21	MelissaTest4077	First Last	emailaddress@email.com	NJ008646020	08625	03/24/21	09/20/21	SkillSoft