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 (NJDOL) 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 Education\(^1\) 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.

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

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.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Metrix Report data used to search AOSOS</th>
<th>Steps for data entry in AOSOS</th>
</tr>
</thead>
</table>
| Individual with an existing AOSOS record who registered via *SkillUp New Jersey* using a customized registration link | AOSOS IDs are included on Metrix Learning reports for these individuals | • Pull up AOSOS record  
• Verify data in AOSOS matches Metrix  
• Enter activity: *Metrix/SkillUp NJ – Customer* |
| Individual with an existing AOSOS record who registered via *SkillUp New Jersey* 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. | • Pull up AOSOS record  
• Verify data in AOSOS matches Metrix  
• Enter activity: *Metrix/SkillUp NJ – Customer* |
| Individual with an existing AOSOS record who registered via local *SkillUp* portal |  | • Pull up AOSOS record  
• Verify data in AOSOS matches Metrix  
• Enter activity: *SkillUp Participant* |
| Individual with no AOSOS record who registered via *SkillUp New Jersey* portal | Please try multiple searches, using varying combinations of the registration information to ensure as high a match rate as possible. | • Create a new AOSOS record with Metrix Learning registration information  
• Enter activity: *Metrix/SkillUp NJ – Customer* |
| Individual with no AOSOS record who registered via local *SkillUp* portal |  | • Create a new AOSOS record with Metrix Learning registration information  
• Enter activity: *SkillUp Participant* |

* 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.
<table>
<thead>
<tr>
<th>Tab</th>
<th>Field</th>
<th>Data Entry Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>AOSOS – Customer Detail</td>
<td><strong>SSN</strong></td>
<td>Select checkbox for “Not Disclosed”</td>
</tr>
<tr>
<td></td>
<td><strong>Job Seeker</strong>*</td>
<td>Enter value “Inactive”</td>
</tr>
<tr>
<td></td>
<td><strong>Username</strong></td>
<td>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)</td>
</tr>
<tr>
<td></td>
<td><strong>Password</strong></td>
<td>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)</td>
</tr>
<tr>
<td>General Info</td>
<td><strong>Last Name</strong></td>
<td>Enter Metrix Learning information from Last Name</td>
</tr>
<tr>
<td></td>
<td><strong>First Name</strong></td>
<td>Enter Metrix Learning information from First Name</td>
</tr>
</tbody>
</table>
|                     | **Date of Birth**      | Enter Metrix Learning information from Date of Birth   
*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.* |
|                     | **Gender**             | Enter Metrix Learning information from Gender 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 Zip field OR Enter “TBU”                                                                                                                      |
|                     | **Zip**                | Enter Metrix Learning information from Zip                                                                                                                                                                        |
|                     | **County**             | Enter county                                                                                                                                                                                                        |
|                     | **Email**              | Enter Metrix Learning information from Email Address                                                                                                                                                               |
|                     | **Ethnic Heritage and Race** | Enter Metrix Learning information from Race/Ethnicity 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 Employment Status 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”   
*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”.*                                                                 |
| Addl Info            | **Service Veteran***   | Enter value “No”   
*Do not change value to “Yes”, based on Metrix Learning registration data, unless verified in subsequent engagement with customer.*                                                                                           |
|                     | **Employment Objective*** | Enter “TBU”                                                                                                                                                                                                         |
|                     | **O*Net Title***       | Enter value “27304305” and the system will automatically populate the O*Title: Poets, Lyricists, and Creative Writers                                                                                                   |
|                     | **Acceptable Job Location*** | Enter value “New Jersey” in the “Anywhere in the following states” field                                                                                                                                                 |
| Work Hist.          | **Work History**       | Select checkbox “No Information Provided”                                                                                                                                                                              |
|                     | **Certificates/Licenses** | Select checkbox “No Information Provided”                                                                                                                                                                                  |
|                     | **Schools**            | Select checkbox “No Information Provided”                                                                                                                                                                                |
|                     | **Professional Associations** | Select checkbox “No Information Provided”                                                                                                                                                                                 |
|                     | **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.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Field</th>
<th>Data Entry Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment</td>
<td>Cultural Barriers to Employment</td>
<td>Enter value “Not Disclosed”</td>
</tr>
</tbody>
</table>
|                   | Youth Needing Additional Assistance        | Enter value “No”  
This field is only required if the individual is between the ages of 14 and 24, inclusive; then enter the default value of “No”. |
| 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”  
This field is only required if the individual is between the ages of 14 and 24, inclusive; then enter the default value of “No”. |
| 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.
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

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

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

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

Customer Detail → Gen. Info tab

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.
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’.
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

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

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

Select the checkbox to indicate ‘No Information Provided’.

Customer Detail → **Ed/Lic** tab

For **Certificates/Licenses**, **Schools**, and **Professional Associations**, select the checkbox to indicate ‘No Information Provided’ for each section.
For the **Additional Skills Text** field, enter “TBU”.

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

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.

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

**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.

**Comp Assess ➔ Employment tab**

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.
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**

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

**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:

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

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.

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

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

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

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.

![User Registration Detail Report](image)

Below is the completed Activities window:

![Activities window](image)

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.

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.

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.

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

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.
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: