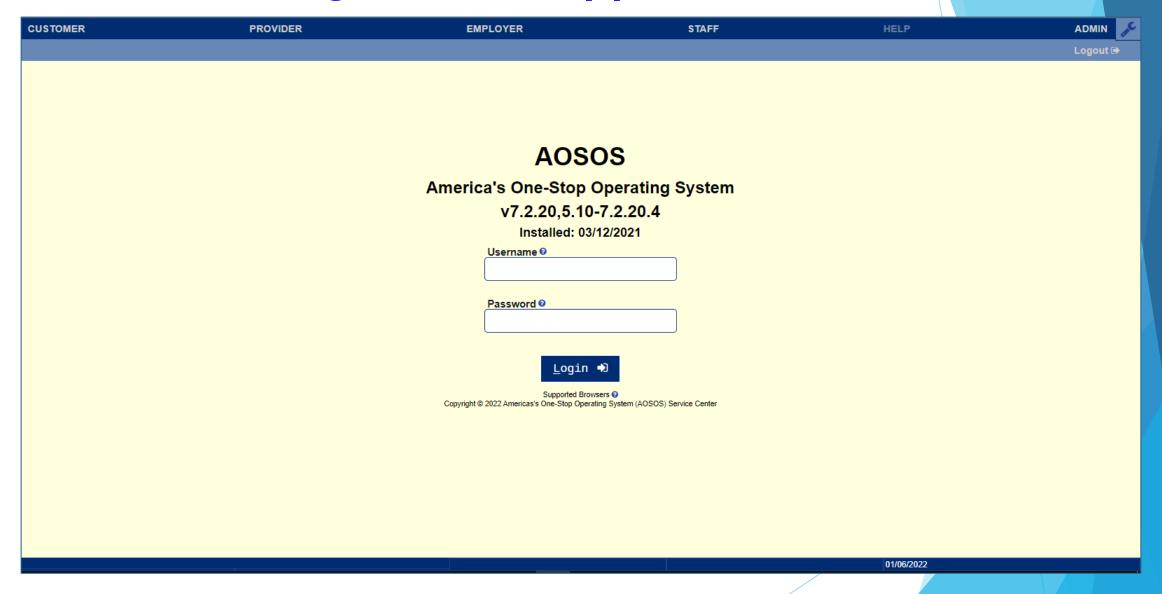
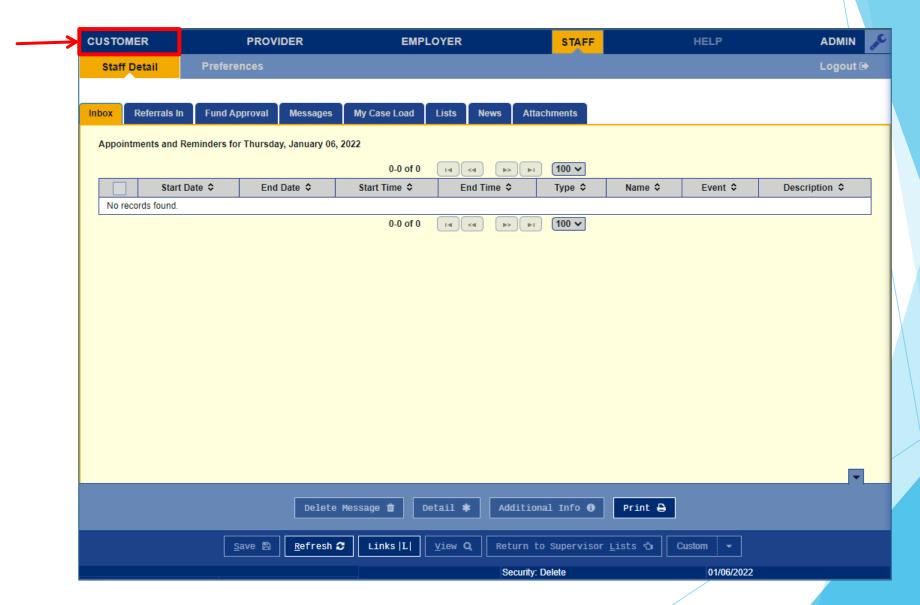
NextGen - Customer Services

Created by Workforce Information Systems and Evaluation Support Team

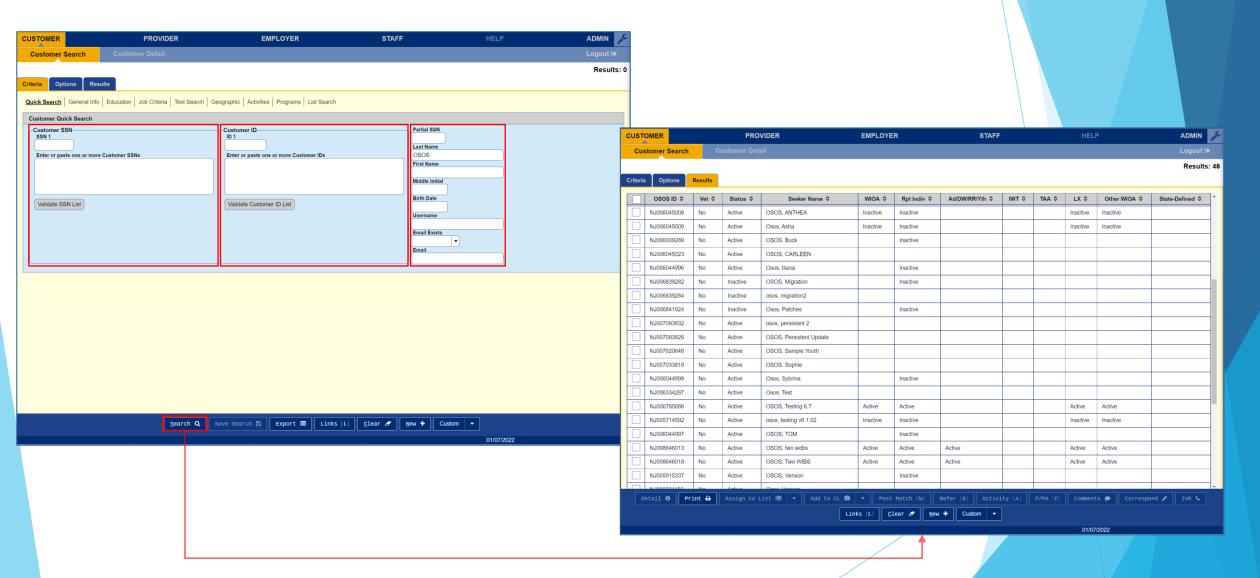
Login to the Application



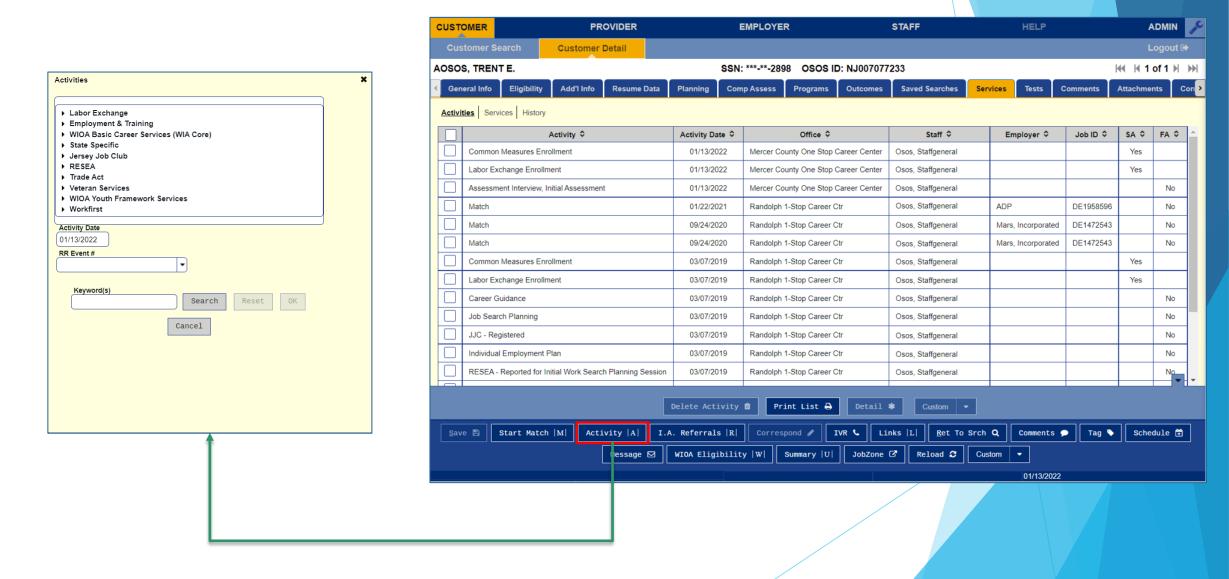
Navigate to the Customer Module



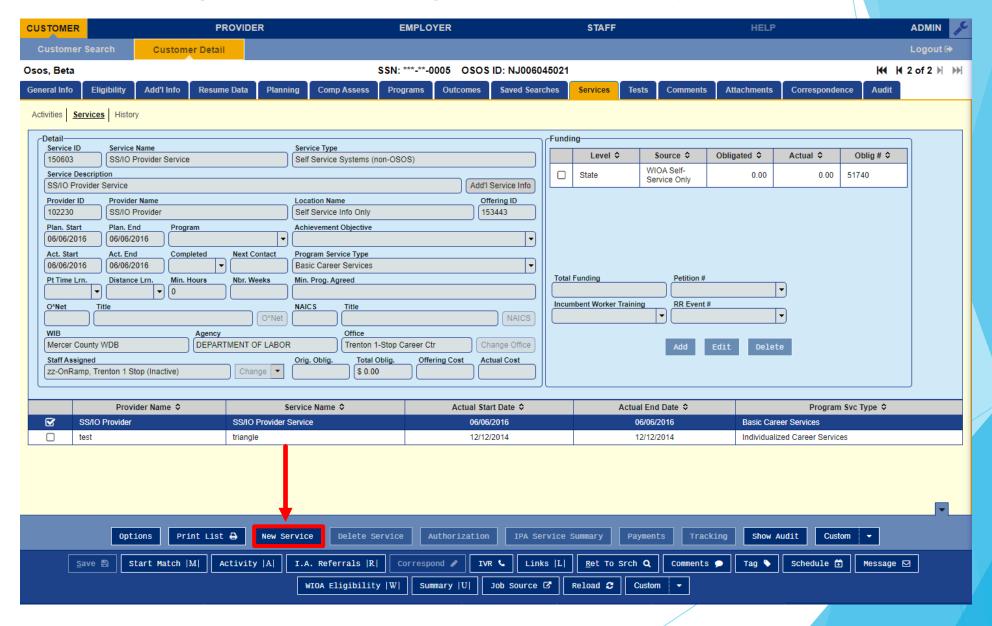
Search for and Open an Existing Record



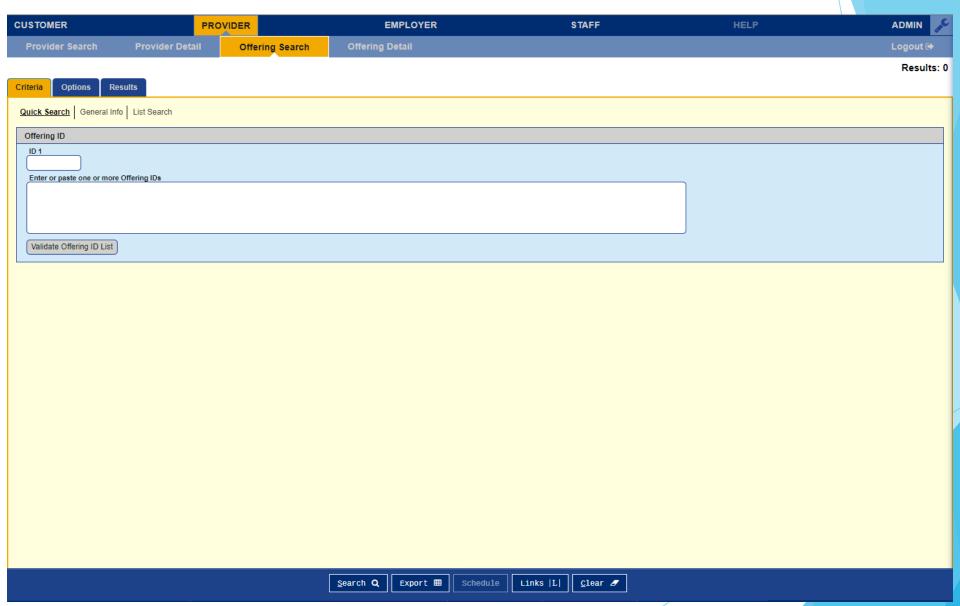
Navigate to the Customer Detail - Services Tab



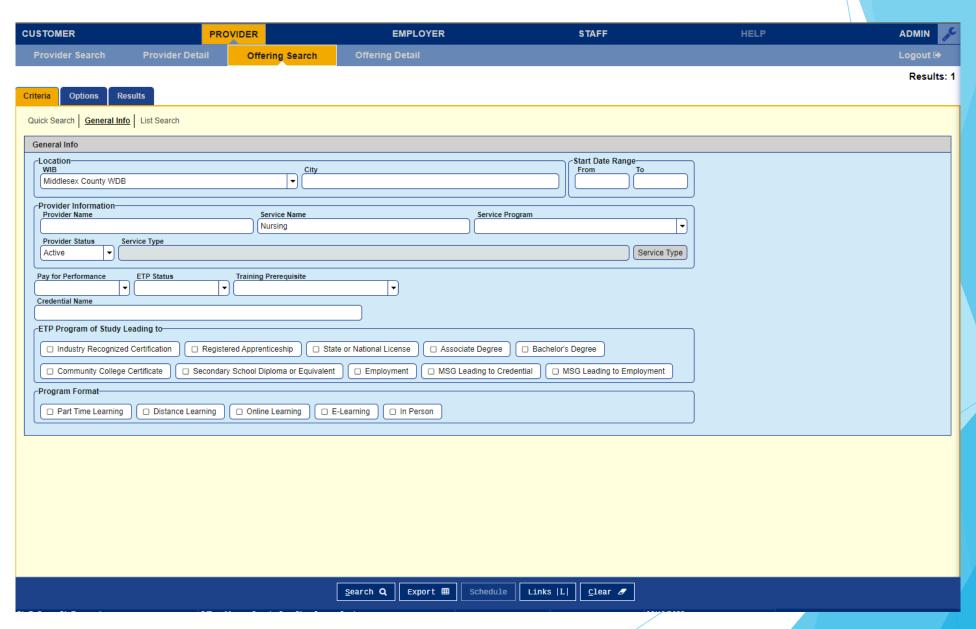
Services - Services Tab



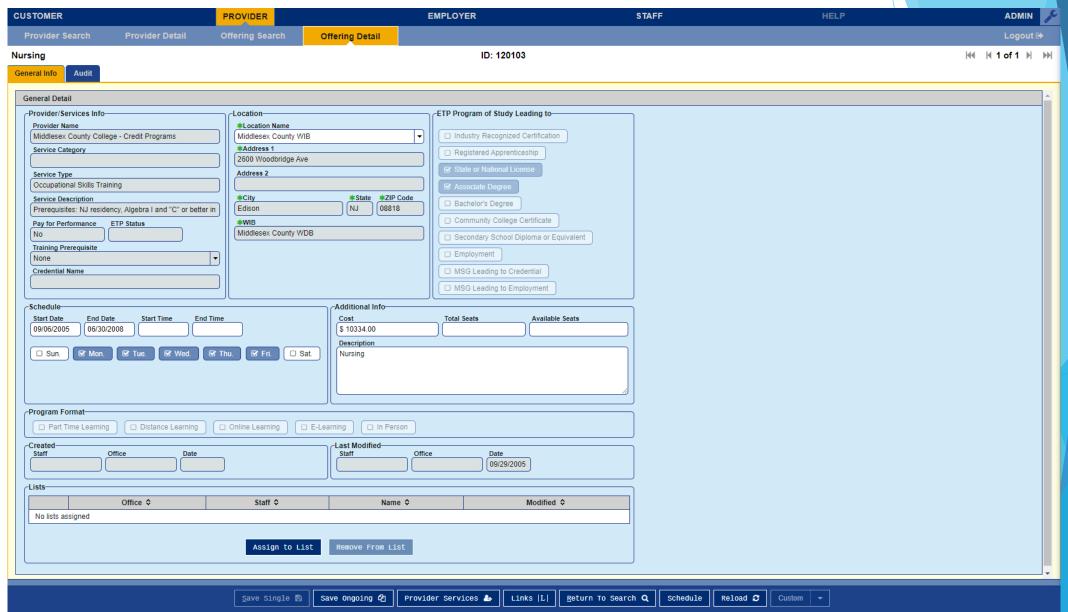
Offering Search by ID



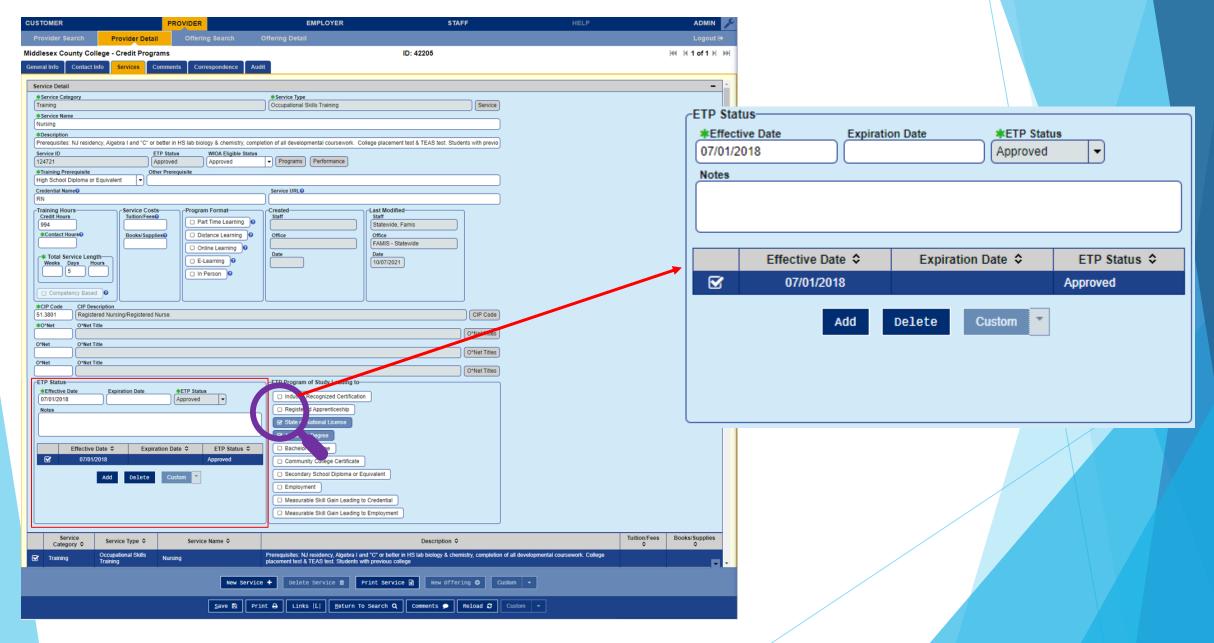
Offering Search by Other Fields



Offering Detail



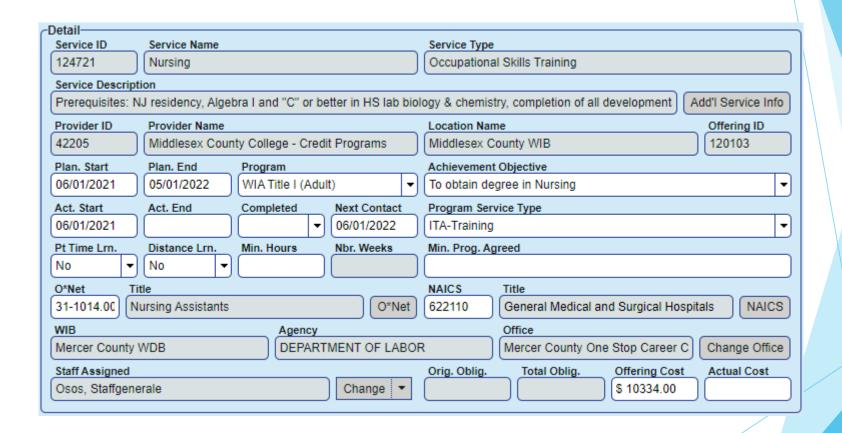
Provider Detail - Services Tab



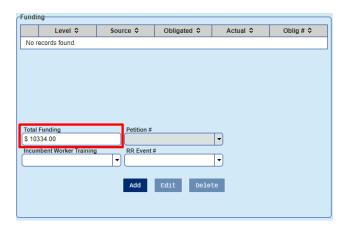
Services - Services Tab from Provider

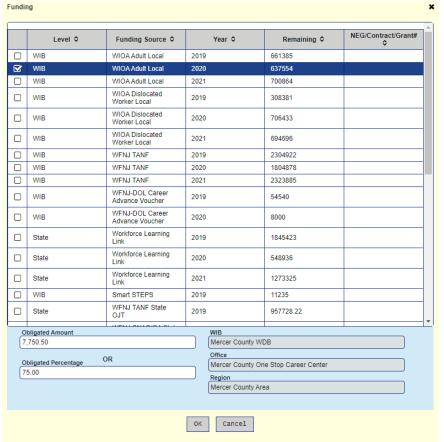
CUSTOMER		PROVIDER		EMPLOYER		STAFF		HELP		ADMIN 🔑
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Detail Service ID 124721 Service Descriptic Prerequisites: N. Provider ID 42205 Plan. Start 06012021 Act. Start Pt Time Lrn.	Service Name Nursing on J residency, Algebra I and "C" Provider Name Middlesex County College Plan. End 05012022 Act. End Compl Distance Lrn. Min. H Title Nursing Assistants	or better in HS lab biology & che - Credit Programs am ▼ leted Next Contact	Service Type Occupational Skills emistry, completion of a Location Name Middlesex County V Achievement Objecti Program Service Typ Min. Prog. Agreed NAICS Title 622110 Ger Offin	Training all developmental coursework. Collet WIB ive pe eneral Medical and Surgical Hospitals	Add'l Service Info Offering ID 120103 NAICS Change Office Actual Cost	Funding Level No records found. Total Funding Incumbent Worker Training	Source \$ Petition#	Obligated ≎	Actual Oblig # V	
Osos, Staffgener	rale	Change ▼		10334.00						
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✓ Middlese	ex County College - Credit Pro	rider Name 🌣	Nur	Service Name ≎	Actua	I Start Date ≎	Actual End	Date 💝	Program Svc Type ❖	
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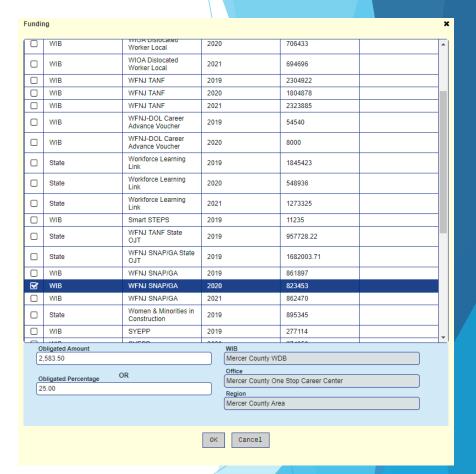
Services - Services Tab Completion



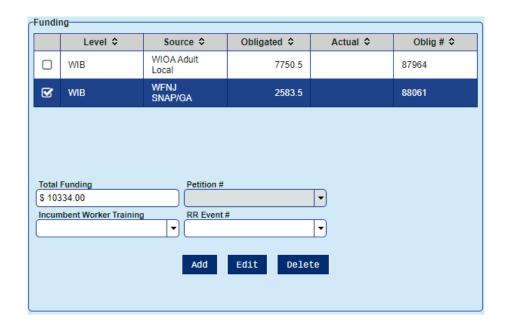
Services - Services Tab Funding

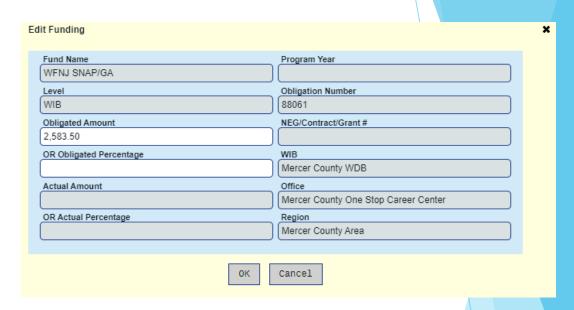


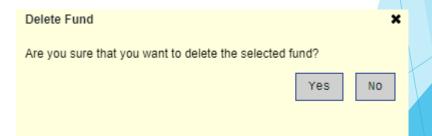




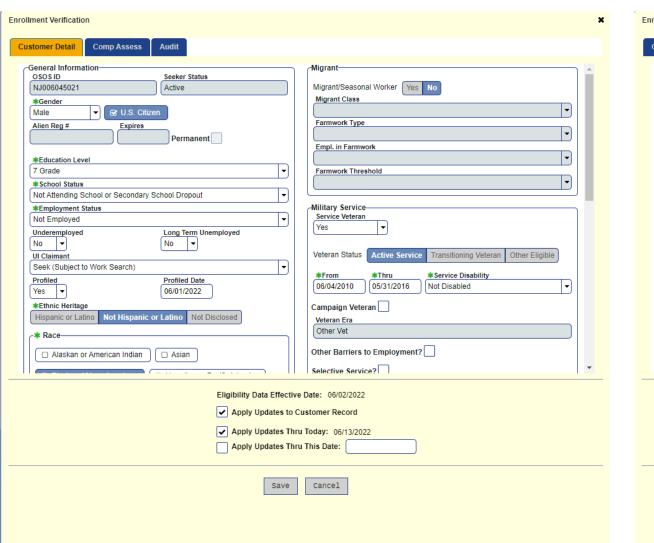
Services - Services Tab Funding





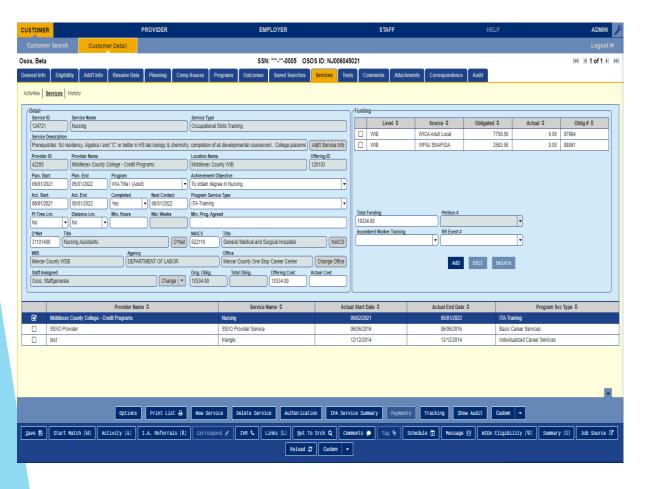


Verification Screen



Enrollment Verification	
Emolinent verincation	
Customer Detail Comp Assess Audit	
Employment Poor Work History? Youth Needing Additional Assistance	Education *Basic Skills Deficient/Low Level of Literacy No *English Language Learner? No Customer below appropriate grade level? Pell Grant Recipient? Any indication of learning disabilities? Legal Offender Status Housing *Current Housing Current Housing Offender Status Last Modified Staff Administrator, Middle Tier Office Date Mercer County One Stop Career Center
Eligibility Data Effectiv	
✓ Apply Updates Thi Apply Updates Thi	
Apply opulies in	
Save	Cancel

Closing Services

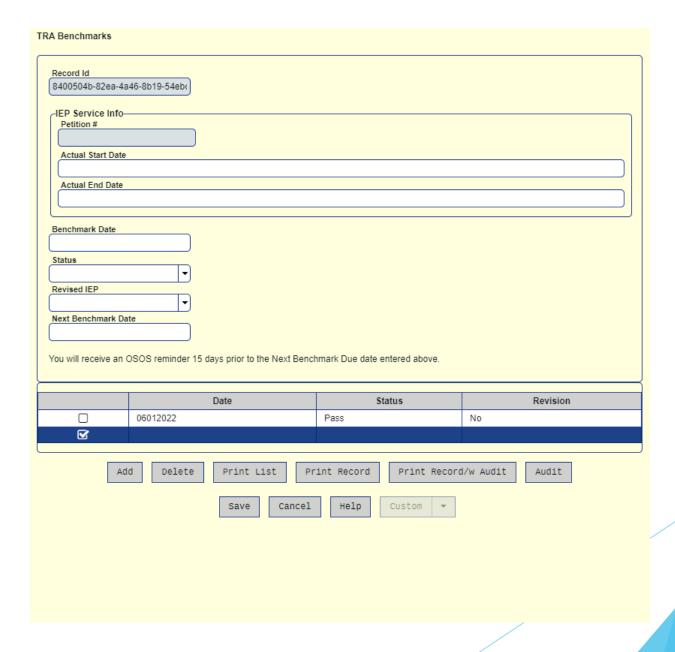


CUSTOMER	PROVIDER	EMPLOYER	STAFF	HELP	ADMIN 🎤
Customer Search	Customer Detail				Logout ⊕
Osos, Beta		SSN: ***-**-0005 OSOS I	D: NJ006045021		≪ ≪ 1 of 1
General Info Eligibility Ad	Id'l Info Resume Data Planning Com	p Assess Programs Outcomes Sav	ved Searches Services Tests Comm	ments Attachments Correspondence Audi	t
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Obtain Employment in the Healti	heara Industry				
Goal Justification	incare muusily				
Goal Justilication					
Achievement Objectives—					
*Achievement Objective To obtain degree in Nursing					
Type of Goal		Goal Attainment		J	
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*Planned Start Date	*Planned End Date	Actual Start Date	Actual End Date	<u> </u>	
05/15/2021	08/20/2022	06/01/2021][
*Evaluation Date	Closure Reason				
08/02/2022	Objective, Completed				
Outcome / Status Successfully completed progra	im.				
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				J	
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Save 🖺 Start Match M	f Activity A I.A. Referrals R	Correspond / IVR Links	L Ret To Srch Q Comments 🗩	Tag ♦ Schedule 🖺 Message 🖂	WIOA Eligibility W
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Services Buttons



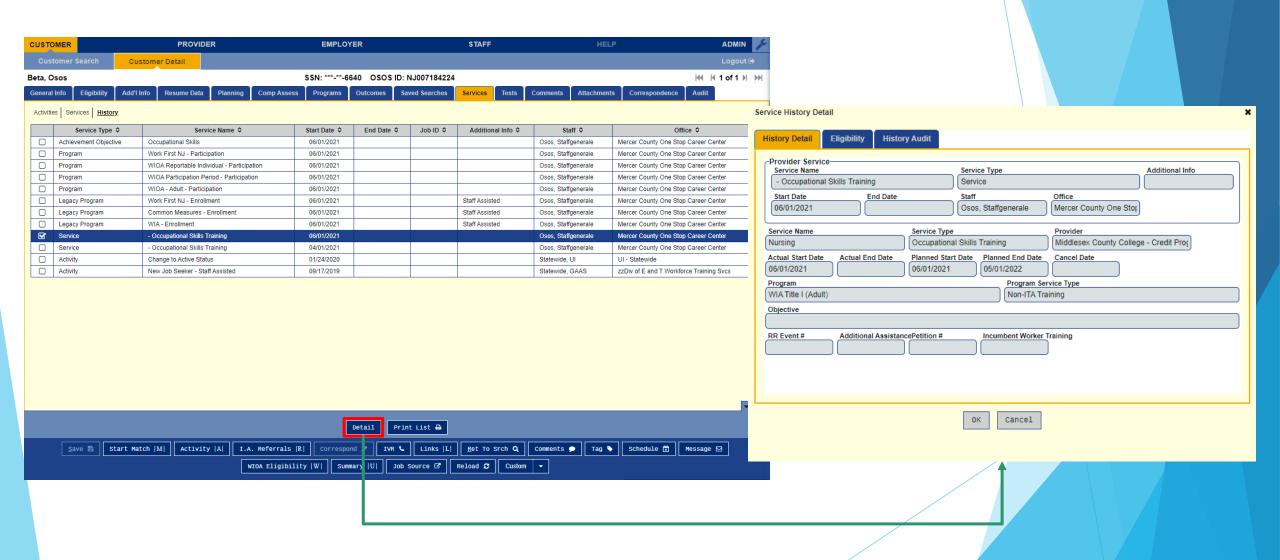
Services - Custom Tab - TRA Benchmarks



Services - Custom Tab - Trade Act



Service History



Services - Outcome Tabs



STOMER	PROVIDER	EMPLOYER	STAFF	HELP	ADMI
	Customer Detail				Logo
os, Beta		SSN: ***-**-0005 OSOS ID: I	N.1006045021		₩ H 1 of 1
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ployment Outcomes Training	Outcomes Legacy Outcomes				
Training/Education-					
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*Enroll Date		Completion Date		(Participations)	
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Certification Date	Leads to Cred./Empl.				
		<u> </u>			
Major/Program					
Degree/Cert./Cred.					
School/Institute					
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Seeker Service ID	Seeker Service Name				
			[Training Services	
Type ≎	Schoo	ol/Institute ≎	Enroll Date ≎	Attainment S	tatue ^
					itatus V

Potential Errors (Abbreviated Message)

- 1. Selective Service message All male customers must have "Selective Service" checked on the Additional Info tab in Customer Detail. Though the number does not need to be present, the flag must be indicated. Many programs, including Title 1 will require the Selective Service number even if the system doesn't require it.
- 2. Not qualified to receive this funding This message refers to certain programmatic requirements. For example, a dislocated worker without a work history, etc.
- 3. Desired funds don't show This usually occurs when the requirements for that fund are not met. For example, youth funds do not show if the youth DOB makes them too old, or if they do not have a barrier.
- 4. Planned end date prior to planned start This message usually appears when the staff enters the wrong year. For example, the training is from 9/15/2020 to 2/1/2021 but 2/1/2020 is accidentally entered.
- 5. O*Net required Sometimes a training may be posted in the provider module without the associated O*Net. If not available and the service is populated into the customer's Service record, this message may display when adding funds because particular funds require the O*Net for training services. This can be added to the appropriate field on the customer record before funding.
- 6. Funding total error This message will appear if the obligated amounts do not add up to the total funding amount.
- 7. Can't change a closed service Once a service has an Actual End Date, it cannot be altered. If something was done in error and must be altered, the Actual End Date must be removed and the record saved before making any modifications. Any time an alteration must be made, the process must be performed in reverse.

FAQ

What does "de-obligate mean?

The term de-obligate means to return funds already appropriated for a customer back into the "Funding Source" account, making it available for use at a later time, and a result, lowering the amount of the obligation. An example would be if a training costs \$3000 but the customer drops out prior to completion so the amount charged is now \$1000, the fund can be adjust to now say the total funding amount is \$1000. The difference (\$2000), would go back into the "pot" of the remaining balance for use later by changing both the fund amount and total funding field.

What is an incumbent worker?

An incumbent worker is a customer that is currently working for an employer but may need to upgrade or learn new skills in order to keep or advance in their current job. Incumbent workers should not be included in performance; checking the "Incumbent Worker" box indicates their association and does not include them in performance for the fund used.

What is a petition number?

A petition number is a unique identifier for the Trade Act Program. If a company is moving their operations to a foreign country, a petition is filed to provide their current employees that are being laid off with certain services, including training. When the Petition Number is entered into the customer's work history, it becomes available in the services module to tie these specific services to that petition. Only the Trade Act staff can perform this action.

FAQ Continued

What is a Rapid Response Event number (RR Event #)?

An RR Event number, like the petition number for the Trade Act program is the identifier for a company that is having a mass layoff. The difference is that Trade Act focuses only on those companies moving their operations out of the US, whereas the Rapid Response Program staff are the first responders to any major layoff. They visit the company prior to the expected event to inform the employees of services available to them. The Rapid Response Team begins the registration process by entering customer records, recording the event number on the work history, and entering activities to record the services they provide. The difference is, after the Rapid Response event, One-Stop staff can now provide services to these customers and they should, whenever possible, tie the service to that event number. Staff should always use the drop down and choose the event number if there is one available.

Can a customer be both a Trade Act participant and a Rapid Response participant?

Absolutely. Most Trade Act participants begin as a Rapid Response participant first. The only time they may not is if the company does not notify the Rapid Response Team of their intentions prior to downsizing or closing their operations. Of course, the reverse is not true; not all Rapid Response customers will be Trade Act participants based of the definition of Trade Act. The customer's work history may show both of these ID's on the same job when appropriate.

NextGen training topics available:

- Customer Search
- Programs/Public Assist
- Customer Module
- Comp Assess
- Customer Services
- Programs/Public Assist
- Activities & Comments

- Customer Outcomes
- Providers/Offerings
- Employers/Job Orders
- Matching from Customer > Secure Counseling Tab
- Matching from Job Order > Staff Module
- Options and exporting
- List function

- Correspondence function
- Links
- ► I.A. Referrals

- Follow up Best Practices
- Reporting

Questions regarding the training you just viewed can be sent to: WorkforceInformationSystems@dol.nj.gov