Office of Research and Information

IGX MANUAL

FOR
NEW JERSEY'S ELIGIBLE TRAINING PROVIDERS

Version 1

Center for Occupational Employment Information

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New Jersey Department of Labor and Workforce Development links:

Intelligrants (IGX)

New Jersey Department of Labor

 Office of Research and Information

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My Career NJ

Before getting started in IGX

Determine if you are a **Private Career School Provider** (PCS) or an **Eligible Training Provider** (ETPL):

If another New Jersey government agency does NOT regulate your programs, you are a Private Career School provider and can select the Private Career School (PCS) initial application. The New Jersey Departments of Labor and Education will approve and regulate your programs for placement on the Eligible Training Provider List.

If another New Jersey government agency regulates your organization's training programs, then you are an Eligible Training Provider and can select the Eligible Training Provider (ETPL) initial application.
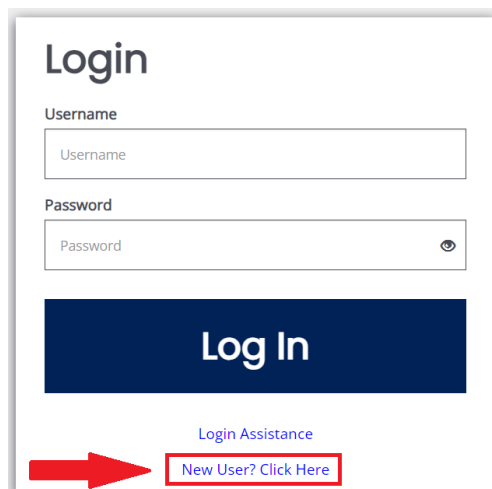
For information about other New Jersey governing agencies, please refer to the pdf link for the NJ Eligible Training Provider List procedures

For New Users Registering In IGX

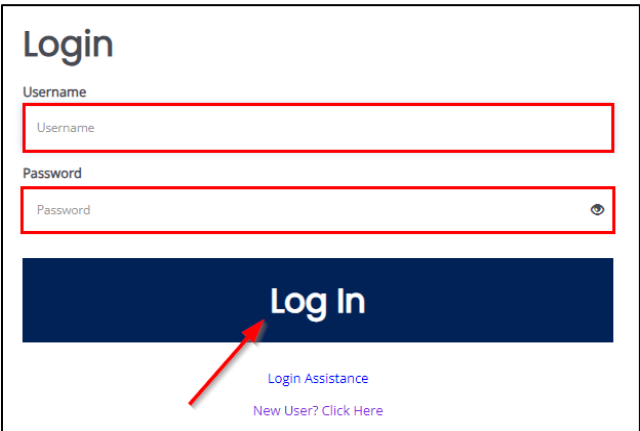**New users should register in IGX by following the URL and completing the required fields.**

Click on this hyperlink or cut and paste it into your browser: https://njdol.intelligrants.com/

1. Select the "New User? Click here" link located within the **Login** section
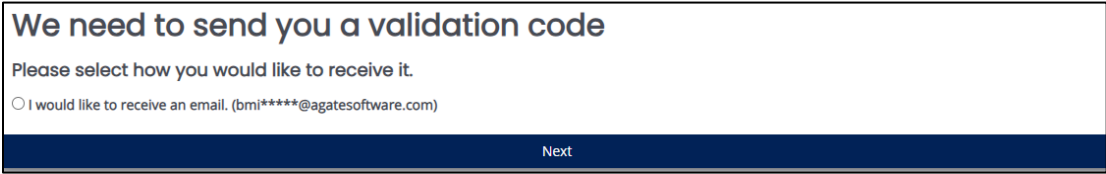
2. Fill in all the required fields and click **Register.**
3. The registration may take up to **3 business days** to approve**.**

4. You'll receive an email confirmation.
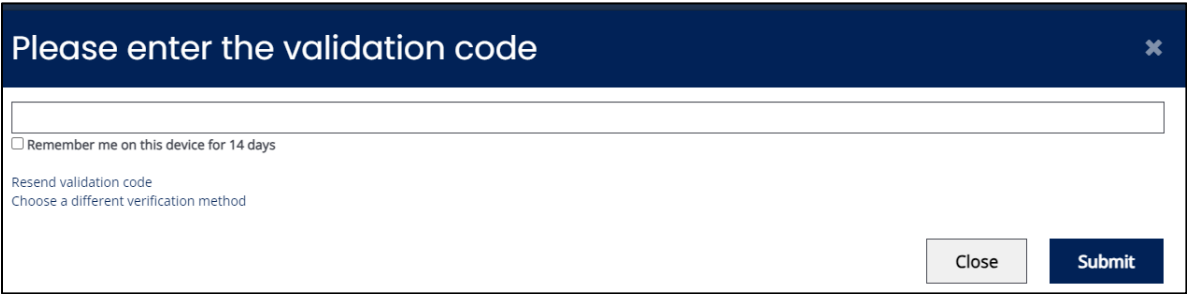5. Then, you can **Log in** using your **Username** and **Password**.

Multifactor Authentication

1. Multi-Factor Authentication may require entering a **validation code** sent to your cell phone if you have provided a cell phone number.

2. After you get the code, you can tick a box to have the system remember your device for two weeks.

3. If you forgot your password or username, click the **Login Assistance** link under where you would typically log in.

4. Next, to **Reset Your Password**, enter your email and username or click **Forgot Username** to email the username associated with that account.

Instructions:
- Please enter in the email and username of the forgotten password.
- An email will be sent to the corresponding email and username to help reset the forgotten password.

Forgot Password

Email

Username

Forgot Username

Clear   Email

Setting up your Dashboard

After registration, set up your dashboard by adding two (2) panels. These panels will display the tasks ready for you to work on.

- **My Tasks**: This will show any documents that require **YOUR** action.
- **My Opportunities:** Grant opportunities available.

1. To **edit** your dashboard and add/remove panels, click your name in your screen's upper right-side corner and select **Edit Dashboard** from the dropdown menu.
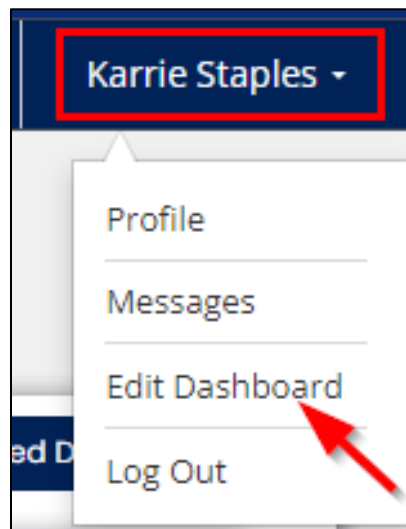
2. **Adding Panels:**

   i. Select **Add Panel** underneath your name
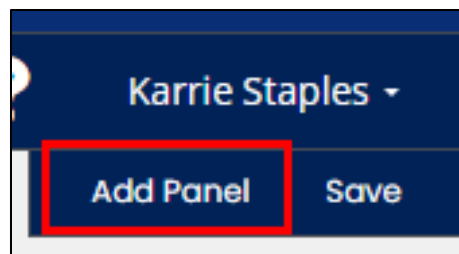
   ii. Select the panel and the format (tall, wide, etc.) from the dropdown menu and click **SAVE.**
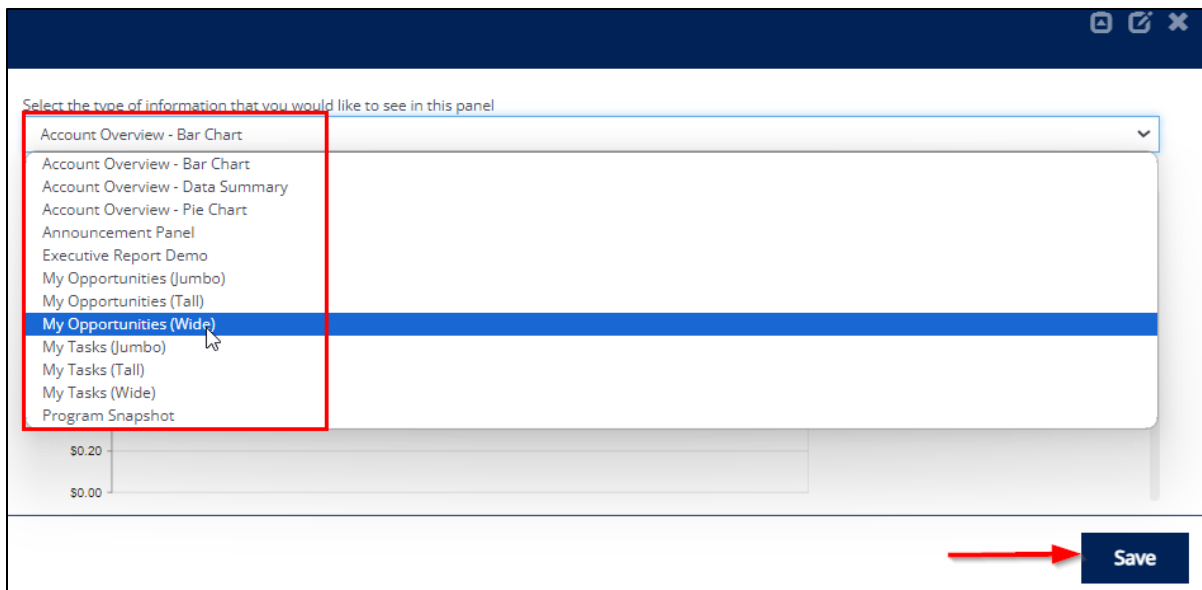
3. **Editing existing panels:**

      i. To edit the format of an existing panel, click the **gear icon** in the upper right corner of the panel.

     ii. To remove a panel, click the red **X** in the upper right corner of the panel
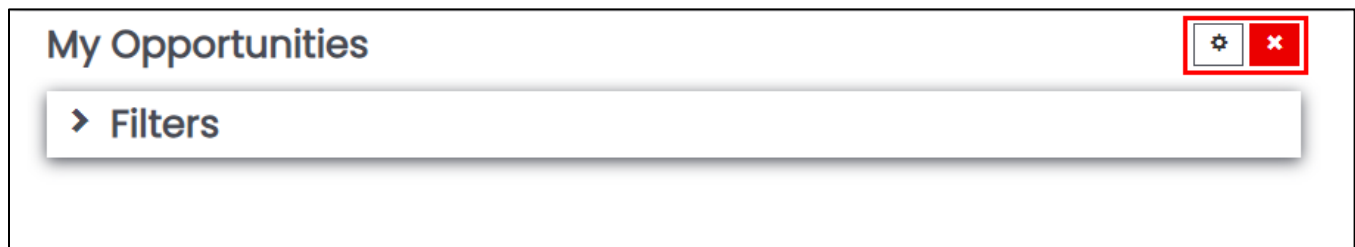
4. After editing your dashboard, click **SAVE** underneath your name in the upper right corner.
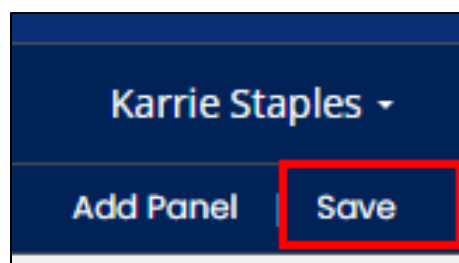
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Adding Members to your Organization

1. Click on your **Name** in the upper right corner.
2. click **Profile.**
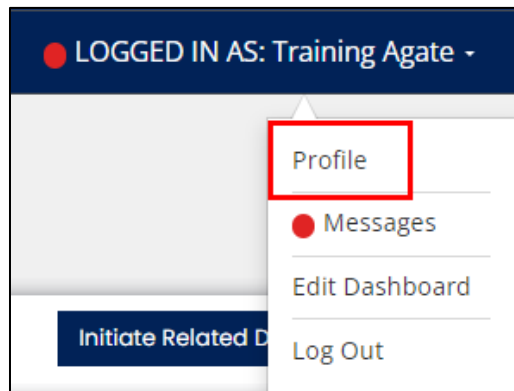
3. On the lefthand navigation menu, select **Organization Members**

4. You can view the members assigned to your organization and their roles.
5. You can also mark members who are no longer part of your organization as **Inactive.**

Add New User to Organization:

       i. To add a new user, click the **Plus (+)** sign in the right corner of the **Members Search** section and select **Add New User to Organization.**

       Note: You need to set the new user's username and password. Users must reset their password when they log in for the first time.

Invite Existing User to Organization:

    i. To add a new user, click the **Plus (+)** sign in the right-side corner of the **Members Search** section.

    ii. Select **Invite Existing User to Organization.**

    iii. Enter the user's email address, the role you want them to have, and their active date (the date they will start working for your organization).

    iv. After entering all the information, click on **SAVE**.

    v. You will get an email with a link to accept the invitation.

    vi. Please ask your colleague to watch out for an email from the IGX system, njsage@intelligrants.com

Note: This link is only valid for 48 hours.
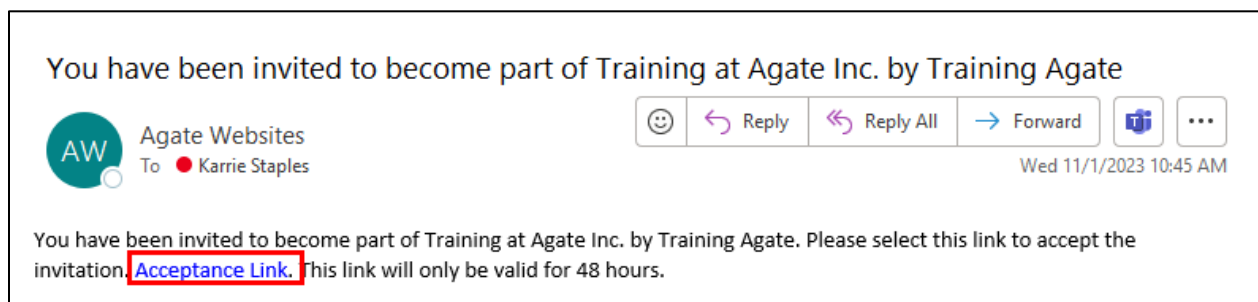
    vii. After clicking the link, users will be directed to the **Login Page,** where they can enter their credentials.

viii. The new users will be taken to their profiles, where they will receive an **Invitation Message** with details about the new organization.
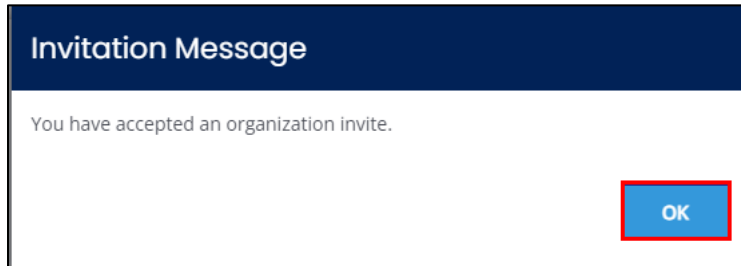
ix. When you invite a new user, you'll get an email when they accept the Invitation.

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Creating an Initial Application

All Training Providers applying to the ETPL for the first time should start an **Initial Application** rather than a renewal.

Reminder: Click here if you need help remembering whether to start a PCS or an ETPL application.

1. You can start an application from your **Dashboard** by clicking on the appropriate application in the **My Opportunities** panel.

2. Providers of Private Career Schools (PCS) start an **Initial Private Career School application.**

3. Eligible Training Providers regulated by another NJ government agency start an **Initial ETPL Application.**

4. After you click the button to create the application, a message will pop up asking if you're sure you want to go ahead. If you are, click **Proceed** to start the application.

5. After clicking **Proceed**, you will be automatically redirected to the application.

Document Landing Page

View document details.

PCS-2023-Shore Beauty School-03663

Forms

Overall Status ☑

Application

Form	
Provider Information I	☐
Provider Information II	☐
Provider Information III	☐
Vendor Information	☐
Program Information	☑
Performance Data	☐
Private Career School Staff Data Form	☐
Required Documentation	☐
Provider Agreement	☐
PCS Checklist and Site Visit Certification	☐

Template
Eligible Training Provider List (ETPL) Private Career School Application 2023

Instance
Eligible Training Provider List (ETPL) Private Career Schools Application 2021

Process
PCS Application

Document Name
PCS-2023-Shore Beauty School-03663

Document Status
PCS Application Approved

Organization
Shore Beauty School

Your Role
Authorized Official

✓ PCS Application In Process → ○ PCS Application Review → ✓ PCS Application Approved → ○ Application Renewal Required

Document Details

Specialist Assigned:

ETPL Expiration Date:　**COA Expiration Date:**　Provider ID:
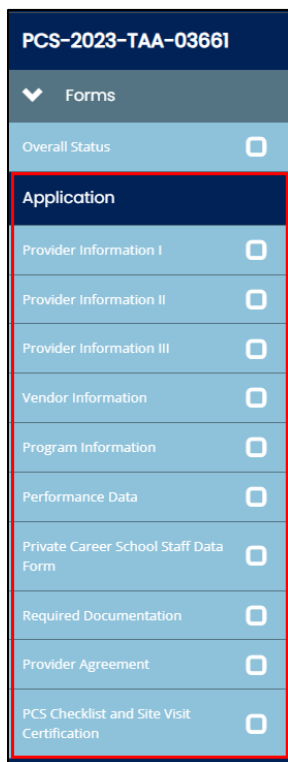0027

Program Titles:

Organization Status:

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Completing Forms

1. When you're in your application, find the **Forms Menu** on the left side navigation bar. This menu has all the forms you must complete to submit your application.

2. To open a specific form, click on its name in the **Forms** menu.

3. After completing the form, click the **SAVE** button below your name in the upper right corner.

4. To move on to the next form, simply click on the form you want from the menu on the left or use the navigation buttons at the bottom of each form.

    Note: The last form will have a **SAVE** **& SUBMIT** option.

    Remember to **SAVE** your work as you go so that it will be there for you when you return!

5. You can click **Next Form** at the bottom of the page to automatically SAVE and move to the next form.

For Private Career School (PCS) Applications:

1. Make sure to fill out the **Program Information and Staff Data Forms.**

2. Use the **Add and Delete** buttons to make changes.

3. Remember, you'll need to complete a form for each program and each staff member.

Remember to **SAVE** your work before leaving each page so that it is there when you return!

4. To go to the next form. click on it in the menu on the left side or use the navigation buttons at the bottom of each form.

Note: The last form will have a **SAVE** and **SUBMIT** Application option.

< Previous Form	Save and Submit Application

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Status Changes

1. To change a document's status, go to the left-side navigation menu and scroll until you see the **Status Options** section.
2. The available status options depend on your current status. For more information, refer to the **Status Guide** by [Clicking Here](#)
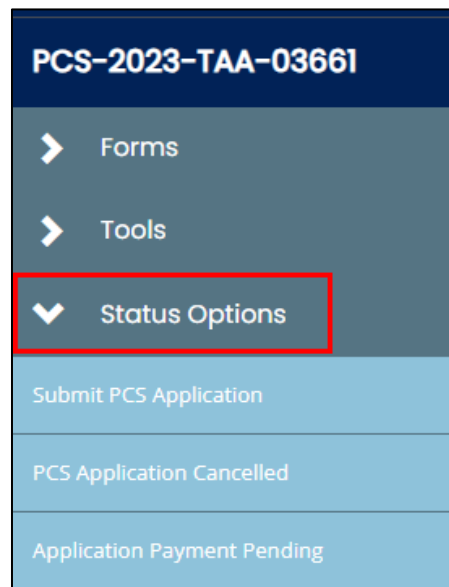
3. Click on the **Selected Status**.

4. When you try to change the status of your document, a window will pop up to confirm if you really want to make that change.

5. Write a note explaining the status change, and click **OK**. This will change the status of your document.

6. If any forms need more information, a **Document Validation** pop-up message will let you know which forms you need to complete before you can change the status.

7. If a document doesn't have any status options and isn't on your **My Tasks** panel, you can't make any changes to it.

8. If you've already submitted the document and need to go back to the application, please write to your assigned specialist via IGX document messages.

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Document Messages

1. To View Your Document Messages

     i. If you have **unread messages**, your name in the upper right corner will have a RED dot next to it.

     ii. To view your messages, click your name in the upper right corner and select **Messages.**
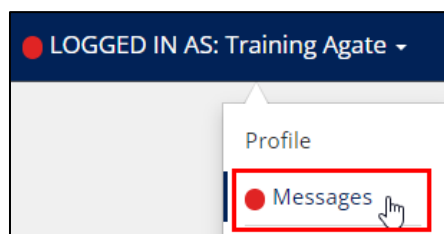
     iii. On the left side of the navigation menu, you can view all sent and received messages, including both read and unread ones.

     iv. The **inbox** will be the default view.
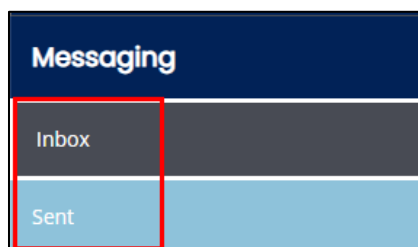
     v. Unread messages will be displayed in **bold**. To read a message, click anywhere within the message line.

     vi. The message will open at the bottom of the screen.

LWD Application PCS-2023-TAA-03659 was successfully submitted   Archive

10/30/2023 2:25 PM

To: Training Agate

Congratulations on your successful submission of grant application PCS-2023-TAA-03659. The application was submitted by Training Agate on Oct 30, 2023.

2. How to Send a Document Message

     i. From your application, scroll down the left-side navigation menu until you reach the **Tools** section, where you can find **Document Messages.**
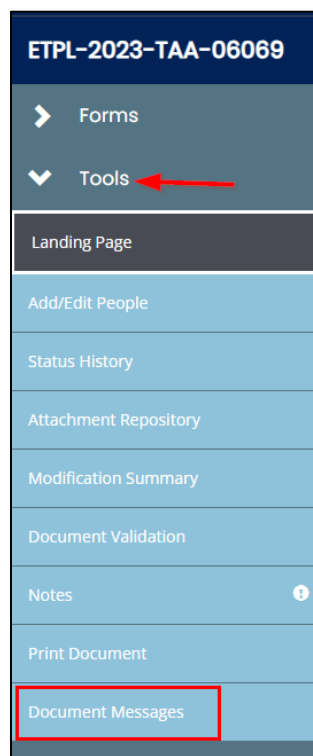
    ii. Click the **Plus (+)** sign in the upper right corner of the message search section.

        Note: You can also view all messages associated with your document here

Message Search   +

Recipient Name   Subject

iii. Select the person(s) you would like to send a message to.

iv. Click **Next.**

v. Don't forget to include the subject of your message, the message itself, and any files you want to attach.

vi. Once you're ready, click on the **Finish** button.

vii. The recipient of your message will now have a red dot next to their name, and your message will show in their inbox.

3. **Replying to document messages**

i. Click on the message you want to reply to and then select **Reply** on the far right side of the message.

Note: If the message sender is **"Grant System"**, you will not be able to reply to their message.

Message Subject

11/1/2023 11:19 AM

To: Other Trainer

Associated Document: ETPL-2023-TAA-06069

Message Body

Archive   Reply

ii. Enter your reply, attach any files you want to send, and click **Send.**

Message Subject

11/1/2023 11:19 AM

To: Other Trainer

Associated Document: ETPL-2023-TAA-06069

Message Body

Send   Cancel

Format ▼ B I U ⋮≡ ⋮≡

Select   Drag Files Here

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Document Tools

Don't forget this: In your document, on the left side, you'll find various **Document Tools** the **Tools** section of the navigation menu.

A **description** of each tool is listed below:

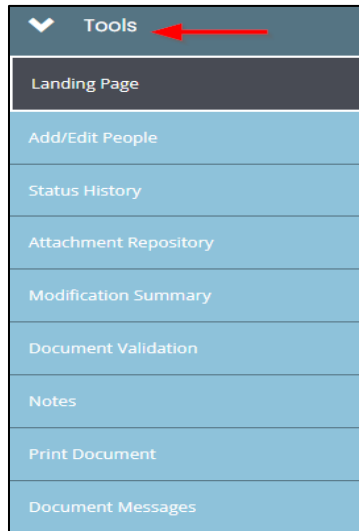| Tool	Description
Landing Page	This will take you back to your document landing page
Add/Edit People	This allows you to add members to the document so they will show in their *My Tasks* and they will have save permissions and status change permissions. You can also view all people added to the document
Status History	This will show you each status the document has gone through, the date/time, who did the status push and any notes (if one was added)
Attachment Repository	This will show all attachments currently attached to the document
Modification Summary	If any modifications have been done, this will show the before and after values for each field that was changed
Document Validation	Clicking this will show a list (if any) of the forms that will need to be completed before you will be able to change the status of the document. Each form name is a clickable link that will take you to that specific form.
Notes	This is a place to add any notes as well as view status changes and the notes tied to the status change
Print Document	This will allow you to select the desired pages to print as a PDF document
Document Messages	Allows you to view, send, receive and reply to messages in the application that also sends an email

Document Searches

1. If you log into IGX and don't see your document(s) in your **My Tasks** pane**l**, it means the document is either being reviewed or has already been approved.

2. You can still locate your document by clicking **Searches** from your menu bar at the top of your screen below the NJDOL page logo.
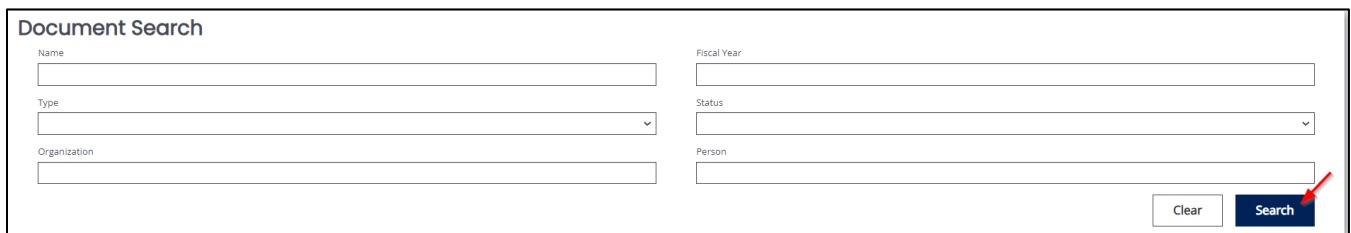
4. To find your recent documents, just hover over the **Recent Documents** tab, and a menu will appear showing the documents you've used recently.

5. To search for an application in **My Documents:**

    i. Click on the **My Documents** tab**.**
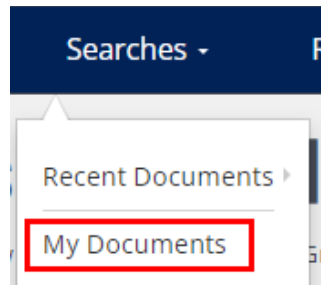
    ii. Enter information into one of the search criteria boxes.

    iii. If you leave the boxes blank, all documents tied to your organization will be

    displayed. Click **Search** to proceed.

    iv. Click on the **Document Name** to open that specific document.

    v. Click on the **Organization Name** to take you to the organization's profile

Documents

Number of Results: 75

Name	Organization	Type	Status	Fiscal Year	Status Date
PCS-2023-TAA-03547	Training at Agate Inc.	Eligible Training Provider List (ETPL) Private Career School Application 2023	Submit Renewal	2023	8/25/2023 3:08:07 PM

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Change Requests

How can I find and make changes to my application?

1. Scroll down the left-side navigation menu to the **Status Options** section and click **Initiate Change Request**.

2. Take a look at the Change Request chart below to see the different **Change Request Options** for documents applicable to Private Career School providers and all other Eligible Training Providers.

CHANGE REQUEST OPTION	CHANGE TO A PCS DOCUMENT	CHANGE TO AN ETPL DOCUMENT
Change in School Name	PCS	ETPL
Change in School Location	PCS	ETPL
Additional Programs with the Additional Program Information	PCS	ETPL
Any Other Changes	PCS	ETPL
Change in Ownership	PCS	
Change in School Director	PCS	
Additional Classroom Space	PCS	

3. When you click **Initiate Change Request**, you'll open the **Change Request Form**.

4. Select the changes that apply.

5. Remember to **SAVE** the page after you've made the changes.

6. The IGX system will display the form that matches your change request.

7. Complete the **Change Request** forms.

8. Scroll down the left-side navigation menu to the **Status Options** section.

9. Submit the **Change Request** form.

10. When you Submit the form, it will move from your **My Tasks** dashboard panel to your assigned specialist's **My Tasks** dashboard panel for review.
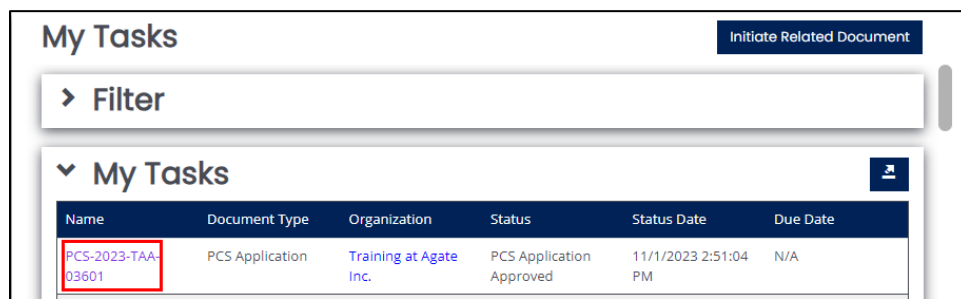
Note: The new status is **Change Request Submitted-In Review**.

When your Assigned Specialist opens the **Change Request** form, it will be **In Review** and no longer visible on your **My Tasks** panel.

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Modifications

1. Remember: If you need to add more information to a submitted application form, you must change the application status back to **Application Modifications Required.**

2. Some examples of Modifications include tuition changes, program descriptions, and uploading required documents with new expiration dates (e.g., Fire Inspection Certificate, Tuition Performance Bond, and Liability Insurance).

3. Don't forget to find your approved application in the **My Tasks** dashboard panel and click on the document name to open it.

4. Scroll down the left-side navigation menu to the **Status Options** section and click **Application Modifications Required**.

5. This will open all of your application forms, which you can edit and re-save with the updated information and documents.

6. There will be a **SAVE** button on every page.
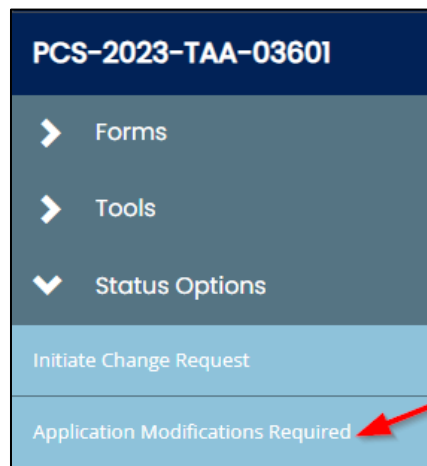
Remember to **SAVE** each page before leaving to start a new one.

7. Click **SAVE** in the upper right corner below your name.

8. Scroll down the left side navigation menu to **Status Options**.

9. Click **Submit PCS Application Modifications**.
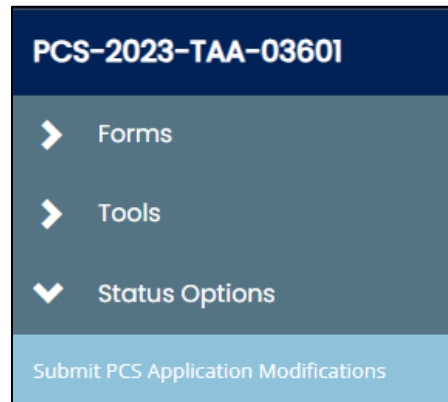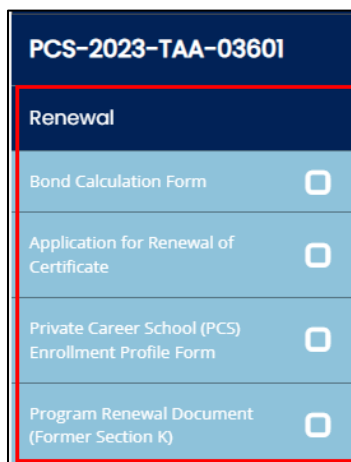
Renewals

1. For Private Career Schools, 120 days before the expiration date of your Certificate of Approval (COA), the system will automatically move your document to **Application Renewal Required**.

2. You will receive an email from the Intelligrants IGX system to inform you about this change. After receiving the email, log into IGX and find your document under **My Tasks**.
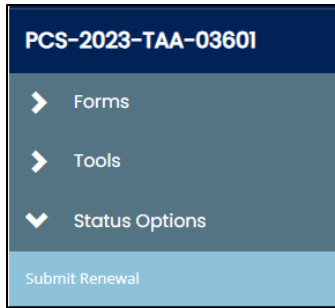
3. To find the **Renewal Section** in the **Forms menu,** scroll down the navigation bar on the left side**.**

4. After you finish filling out your renewal forms and making the payment, scroll down the menu on the left side of the screen to the **Status Options** section, and then click on **Submit Renewal.**

5. While your renewal application is under review with the Training Evaluation Unit (TEU), your assigned Specialist may find errors, incomplete data fields, or request you to upload current documents.

6. Your specialist will send the document back to you with a message or note letting you know that you need to make corrections to the application. They will ask you to modify the application before resubmitting it.

7. You'll get an email notification in your IGX document messages, and the document will also appear in the '**My Tasks'** dashboard panel.

8. Click on the **Document Name** to access it.

Reminder: SAVE before every page before leaving it. **(the SAVE button is located on the top right side of the screen)**

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# Sub-Documents Associated with Your Applications

Just a friendly reminder about the process:

Each application has some connected sub-documents. If any issues come up with your application, the person reviewing the sub-document will reach out to you with a document message or a note. They might ask you to make some changes to the application and then send it back to them.

The specific sub-documents associated with Private Career School Applications are:
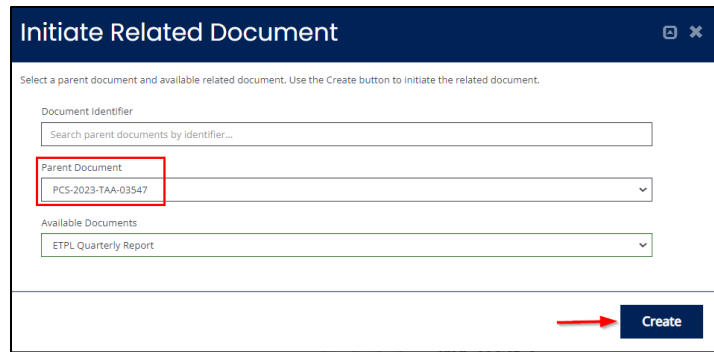
          i. NJDOL Office of Internal Audit (OIA) reviews your financial documents

          ii. NJ Department of Education (DOE) reviews educational documents

          iii. Quarterly & Annual Reports

1. To view any sub-documents tied to your application, click on the application name in your **My Tasks** dashboard panel.

2. Scroll down the left-side navigation menu to find the **Related Documents** section at the bottom.
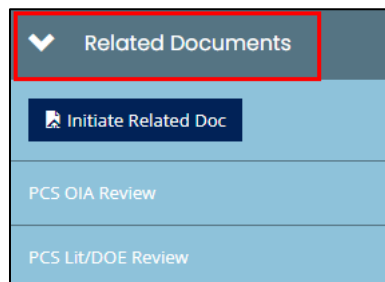
3. To start a related document, go to your **My Task** dashboard panel and click on **Initiate Related Doc.**

4. If you have more than one application, choose the one you want to use for starting the Quarterly or Annual Student Report.

5. Click **Create.**

Note: Only Private Career Schools are required to submit an Annual Student Report

i. In your document, click on **Initiate Related Doc** under related documents**.**
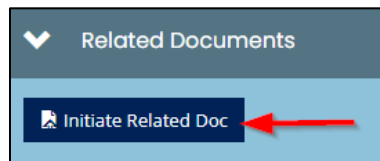
i. When you start to create the Quarterly or Annual Report, a window will pop up asking if you're sure you want to continue.

ii. When you're ready, click **Proceed.**

ETPL Quarterly & Annual Reports

All New Jersey Eligible Training Providers are required to submit quarterly reports.

The Quarterly and Annual Report document section contains three (3) separate reports:

1. Quarterly Report
2. Annual Report
3. Student Transcripts

Quarterly Reports

All Private Career School and Eligible Training Providers are required to submit one report per quarter by the following dates:

- 1st quarter report: April 15
- 2nd quarter report: July 15
- 3rd quarter report: October 15
- 4th quarter report: January 15

Here is the list of information to include in the quarterly reports:

Social Security Numbers

Annual Reports

Only Private Career School Providers are required to submit an annual report and copy of every students' transcript by the following date:

- Annual Report: July 30
- Student Transcripts: July 30

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Certificate of Approval (COA) is only for Private Career Schools

1. Locate your document using the **My Tasks** dashboard panel or through a Document Search.

2. Remember to go to the **Forms Menu** on the left side, then scroll down until you find the **Certificate of Approval** section.

3. Click on the **Certificate of Approval** form.

4. This will create a download of the PDF for your Certificate of Approval that can be saved or printed.

    Note: Make sure you don't have settings that block downloads.

5. Click on the name in the download to open your COA.

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Know your Status

How To Find A Document

1. Using **Document Search** allows you to find:

- A list of all documents tied to your organization; and,
- The status of that document.

2. You can view the status of your document from your **Document Landing Page.**

3. Click on your document name in the upper right corner or from the **Document Landing Page Tool** located in the **Tools section** on your document.

a. You can also **hover your cursor** over your **Document Name** in the upper left corner.

Note: You'll find any documents that need <u>your</u> attention under **Status** in your **My Tasks** dashboard panel.

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PCS Status Guide Explained

Application Type	Status Name	Explanation of the Document Status	Responsible Party	Action Required on *My Tasks*
PCS	PCS Application in Process	This means an initial application is being filled out	Provider	Provider works on the application. SAVE every page
PCS	PCS Application Submitted	Provider has submitted their application to the specialists My Tasks for review	Provider	Provider submits the application. Moved from your My Tasks to the specialist My Tasks
PCS	PCS Application Review	This means NJ DOL reviews your application	NJDOL	NJDOL
PCS	PCS Application Modifications in Process	Provider is making necessary updates to their initial application forms	Provider	Provider updates and/or corrects the application
PCS	PCS Application Denied	Application has been denied by NJDOL.	NJDOL	An explanation for denial is in the Status History note column
PCS	Site Visit Initiated	A site visit is required	NJDOL & NJDOE	The TEU-assigned specialist will be in contact to schedule the visit
PCS	Site Visit Follow-Up Required	A site visit follow-up is required	NJDOL	NJDOL
PCS	Final Agency Review	Application is going through executive-level review	NJDOL	NJDOL
PCS	PCS Application Approved	This means your application has been approved.	None	No action required. You can initiate a modification or a change request
PCS	PCS Application Approved & Published	This means your application has been approved and published to Credential Engine and the Training Explorer.	IGX System	No action required. You can initiate a modification or a change request
PCS	Change Request Initiated	You have initiated a change request that is pending submission	Provider	Provider started a change request
PCS	Change Request Submitted- In Review	A change request has been submitted and is in review by either NJDOL, NJDOE or OIA.	NJDOL	NJDOL reviews the change requests
PCS	Change Request Denied	Your change request has been denied and your initial application remains approved without changes	NJDOL	An explanation for denial is in the Status History note column
PCS	Change Request Approved	Your changes have been approved and applied	None	No action required

PCS	Application Renewal Required	Your Certificate of Approval (COA) will expire in 120 days and requires renewal.	IGX System	Provider will You need to log into IGX and complete your renewal forms
PCS	Renewal Submitted	NJDOL is reviewing your renewal	NJDOL	The renewal moved to NJDOL's *My Tasks* for review
PCS	TEU Specialist Approved	The initial review is approved	NJDOL	NJDOL
PCS	PCS Renewal Modifications in Process	Modifications are required for your renewal document(s)	Provider	Provider to work on required changes to the renewal. SAVE every page
PCS	PCS Renewal Modifications Submitted	You submited the modifications for the renewal	Provider	The renewal moved to NJDOL's *My Tasks* for review
PCS	PCS Renewal Modifications in Review	Renewal modifications are in review by NJDOL	NJDOL	NJDOL reviews the modifications to your renewal
PCS	PCS Application Modifications in Review	Applications modifications are in review by NJDOL	NJDOL	NJDOL reviews the modifications to your application

ETPL Status Guide Explained

Application Type	Status Name	Document Status	Responsible	Actions Required on My Tasks
ETPL	Application in Process	Application that has not been submitted	Provider	SAVE and Submit the application
ETPL	Application Submitted	This will submit your application to NJDOL for review	Provider	Once the application is submitted, NJDOL can start the review
ETPL	Application Review	NJDOL reviews the application	NJDOL	The application is in review
ETPL	Application Modifications in Process	Modifications are required to the initial application	Provider	Make the necessary modifications, SAVE, and Submit the
ETPL	Application Modifications Submitted	Submit your modifications for review	Provider	Once the application is submitted, NJDOL can start the review
ETPL	Application Denied	Your application has been denied.	NJDOL	The reason for denial is noted in the status history
ETPL	Application Approved	The application has been approved by NJDOL	NJDOL	None required
ETPL	CE Publishing Pending*	Your data is ready to publish to the Credential Registry and the ETPL - NJ Training Explorer https://mycareer.nj.gov/training	IGX System	None Required
ETPL	Application Approved & Published	The application data has been published into the Credential Registry *.	IGX System	You can initiate a change request or modification after the application is from this status
ETPL	Renewal Modification in Process	NJDOL requires modifications to the renewal document(s)	Provider	Make the necessary modifications, SAVE every page
ETPL	Change Request Initiated	You have initiated a change request	Provider	The provider works on the change request SAVE every page
ETPL	Change Request Submitted-In Review	A change request has been submitted and is in review by NJDOL	NJDOL	NJDOL reviews the change request. If approved, it returns to the provider's *My Tasks*

ETPL	Change Request Denied	Your change request has been denied and your initial application remains approved without changes	NJDOL	The reason for denial and any instructions to correct the request are in the Status History note column
ETPL	Change Request Approved	Your changes have been approved in IGX	NJDOL	No Action Required
ETPL	Application Renewal Required	The ETPL approval will be expiring in 120 days and requires renewal.	IGX System Notification	Provider to log into IGX and complete your renewal forms.
ETPL	Renewal Submitted	Renewal has been submitted to NJDOL	NJDOL	NJDOL to open the renewal for review

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