

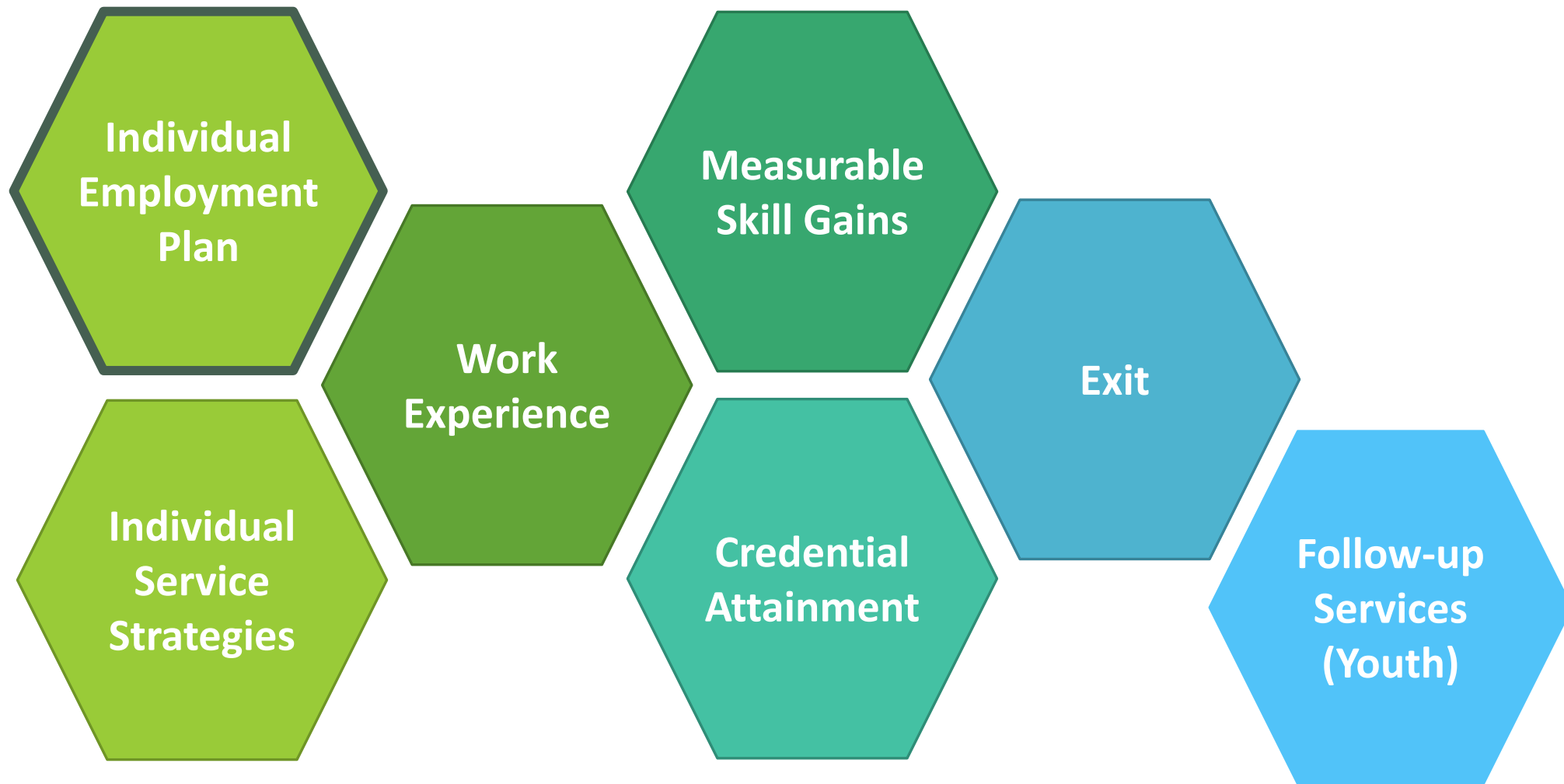


# Individual Employment Plan (IEP) – WIOA Adult/DW

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WIOA TITLE I TRAINING VIDEO SERIES – MARCH 2020





## IEP: A Roadmap for Adult/Dislocated Worker Participants

The Individual Employment Plan (IEP) offers an ongoing strategy to identify employment goals and achievement objectives, develop an appropriate combination of services for the participant to achieve employment goals, and document services and achievement of goals .





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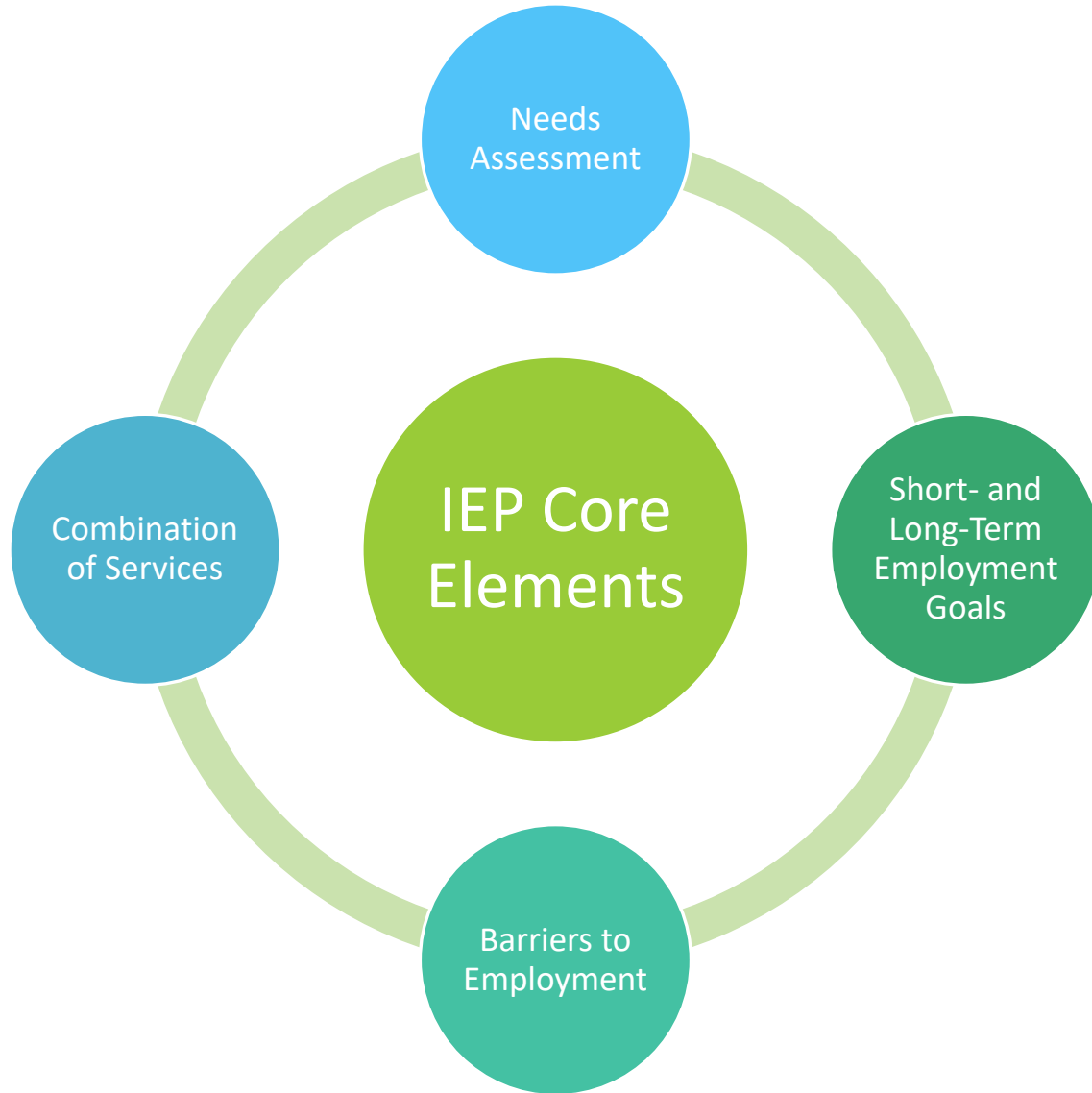
**2019**

WD-PY 19 #	Subject	Issue Date
19-1	<a href="#">WIOA Youth Program Follow-Up Services</a>	10/09/19
19-2	<a href="#">One-Stop Partner Memorandum of Understanding (MOU) and One-Stop Operating Budget and Infrastructure Funding Agreement (IFA) Standardization</a>	10/24/19
19-3	<a href="#">Monitoring Policy and Procedures for Workforce Development Programs</a>	10/10/19
19-4	<a href="#">Procedures for Reporting Fraud, Program Abuse or Criminal Misconduct</a>	10/16/19
19-5	<a href="#">One-Stop Career Center (OSCC) Testing and Intake Guidance</a>	10/17/19
19-6	<a href="#">Workforce Innovation and Opportunity Act (WIOA) Eligibility and Self-Attestation</a>	11/04/19
19-6.1	<a href="#">Workforce Innovation and Opportunity Act (WIOA) Eligibility and Self-Attestation Policy</a>	01/13/20 Revised
19-7	<a href="#">WIOA Youth Individual Service Strategy</a>	01/10/20
19-8	<a href="#">Individual Employment Plan (IEP)</a>	01/17/20
19-9	<a href="#">Recording Case Notes</a>	01/21/20

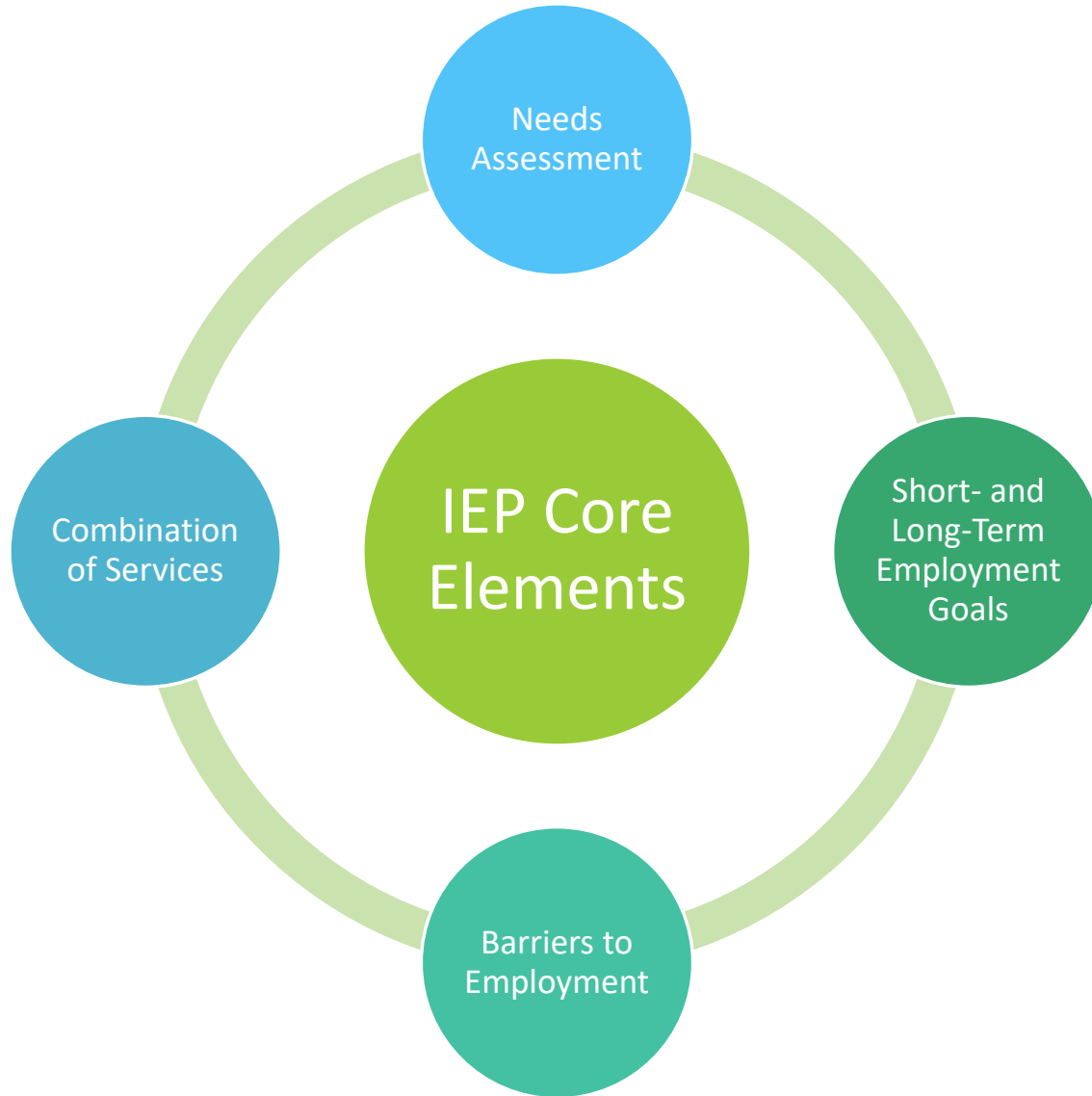
<https://www.nj.gov/labor/wioa/resources/>



## Plan Components



## Plan Components



## Plan Development and Use

### Additional Requirements

- ✓ An IEP is the foundational tool for engaging participants in individualized career services and case management.
- ✓ An IEP should be jointly developed in partnership with the participant.
- ✓ An IEP should reflect the unique goals and needs of an individual participant.
- ✓ An IEP should be used in an ongoing process to monitor and re-evaluate progress towards goals.
- ✓ An IEP should be used to document strategies and activities as they occur, including documentation of referrals.
- ✓ An IEP should ground a connected and seamless experience for customers.





# Assessment of Need



Interview and  
Ongoing Case  
Management with  
Participant



Individual Assessment  
Tools:

- Academic
- Career Interest
- Support Needs



Documentation and  
Review of Work  
History

- Skills Obtained
- Skill Gaps



# Assessment of Need → Customer Detail and Comp Assess

Step 1: All assessment activities should be captured in the **Activities** tab in Customer Detail

The screenshot shows the AOSOS Customer Detail interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, there are sub-tabs for Customer Detail, Comp Assess, Services, and Links. The main content area displays customer information: OSOS, Test A., SSN: \*\*\*-\*\*-9384, OSOS ID: NJ002744823, and 1 of 1. Below this is a navigation bar with tabs for Gen. Info, Eligibility, Add'l Info, Pgma/PA, Objective, Work Hist., Ed/Lic, Skills, Saved Searches, and Activities. The Activities tab is selected, and a table of activities is displayed. The table has columns for Activity, Activity Date, Office, Staff, Employer, and status. A green arrow points to the 'Customer Detail' tab, and another points to the 'Activities' tab.

Activity	Activity Date	Office	Staff	Employer	SA	FA
<input type="checkbox"/> Common Measures Enrollment	05/01/2020	Burlington 1-Stop C	Novatin, Jacqueline		Yes	
<input type="checkbox"/> Labor Exchange Enrollment	05/01/2020	Burlington 1-Stop C	Novatin, Jacqueline		Yes	
<input type="checkbox"/> Assessment Services - Career Assess	05/01/2020	Burlington 1-Stop C	Novatin, Jacqueline			No
<input type="checkbox"/> Individual Employment Plan	05/01/2020	Burlington 1-Stop C	Novatin, Jacqueline			No
<input type="checkbox"/> Eligibility Determination	05/01/2020	Burlington 1-Stop C	Novatin, Jacqueline			No
<input type="checkbox"/> WIA Enrollment	09/11/2018	Trenton 1-Stop Car	zz-OnRamp, Trentc		No	
<input type="checkbox"/> Common Measures Enrollment	09/11/2018	Trenton 1-Stop Car	zz-OnRamp, Trentc		No	
<input type="checkbox"/> Labor Exchange Enrollment	09/11/2018	Trenton 1-Stop Car	zz-OnRamp, Trentc		No	
<input type="checkbox"/> Self Service Systems (non-OSOS)	09/11/2018	Trenton 1-Stop Car	zz-OnRamp, Trentc			No
<input type="checkbox"/> Renewal (active from inactive)	08/24/2017	NJDOL Trenton Ce	zz-OnRamp, Trentc			No
<input type="checkbox"/> Change to Inactive Status	03/16/2017	Trenton 1-Stop Car	Jones, Veronica			No
<input type="checkbox"/> WIA Enrollment	03/06/2017	Trenton 1-Stop Car	zz-OnRamp, Trentc		No	
<input type="checkbox"/> Common Measures Enrollment	03/06/2017	Trenton 1-Stop Car	zz-OnRamp, Trentc		No	
<input type="checkbox"/> Labor Exchange Enrollment	03/06/2017	Trenton 1-Stop Car	zz-OnRamp, Trentc		No	
<input type="checkbox"/> Renewal (active from inactive)	03/06/2017	NJDOL Trenton Ce	zz-OnRamp, Trentc			No
<input type="checkbox"/> Self Service Systems (non-OSOS)	03/06/2017	Trenton 1-Stop Car	zz-OnRamp, Trentc			No
<input type="checkbox"/> Change to Inactive Status	11/21/2016	Workforce NJ Div o	Novatin, Jacqueline			No
<input type="checkbox"/> WIA Enrollment	06/05/2016	Trenton 1-Stop Car	zz-OnRamp, Trentc		No	
<input type="checkbox"/> Common Measures Enrollment	06/05/2016	Trenton 1-Stop Car	zz-OnRamp, Trentc		No	
<input type="checkbox"/> Labor Exchange Enrollment	06/05/2016	Trenton 1-Stop Car	zz-OnRamp, Trentc		No	
<input type="checkbox"/> Self Service Systems (non-OSOS)	06/05/2016	Trenton 1-Stop Car	zz-OnRamp, Trentc			No



# Assessment of Need → Customer Detail and Comp Assess

**Step 2:** Academic test results should be captured in **Test tab** in Customer Details

The screenshot displays the AOSOS Customer Detail interface. At the top, there are navigation tabs: CUSTOMER (selected), PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Detail (selected), Comp Assess, Services, and Links. The main header area shows customer information: OSOS, 1000123456789, SSN: \*\*\*-\*\*-9384, and OSOS ID: NJ002744823. A '1 of 1' indicator is on the right. A secondary navigation bar includes: <<, <, Gen. Info, Eligibility, Add'l Info, Pgms/PA, Objective, Work Hist., Ed/Lic, Skills, Saved Searches, Tests (selected), >, >>. The 'Test Detail' section contains form fields for Test Type, Office, and Completed Date, along with a 'Test Details' button. Below this is a table with columns for Test Type and Completed Date. At the bottom of the form are 'Add Test' and 'Delete Selection' buttons. A footer bar contains various system functions: Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message. Two green arrows point to the 'CUSTOMER' tab and the 'Tests' tab.



# Assessment of Need → Customer Detail and Comp Assess

**Step 3:** Occupational and service need assessment results should be captured across the **tabs** in **Comp Assess**

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail **Comp Assess** Links

OSOS, Test A. SSN: \*\*\*.\*\*-9384 OSOS ID: NJ002744823

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

Monthly Financial Information

Income			Expense				
	Source	Category	Amount		Source	Category	Amount
<input type="checkbox"/>				<input type="checkbox"/>			

Add Modify Delete Add Modify Delete

Income Subtotal \$ 0.00 Expense Subtotal \$ 0.00

Monthly Balance \$ 0.00

Save Customer Detail Services Activity Correspond WIOA Eligibility Summary Comments



# Assessment of Need → Customer Detail and Comp Assess

**Step 4:** Additional documentation of these assessments and their results should be captured in the **Comments tab in Comp Assess**

The screenshot displays the AOSOS system interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, a blue header bar contains 'Customer Search', 'Comp Assess' (highlighted in orange), 'Services', and 'Links'. The main content area shows customer information: 'OSOS, Test A.', 'SSN: \*\*\*-\*\*-9384', and 'OSOS ID: NJ002744823'. A secondary navigation bar includes tabs for 'Employment', 'Education', 'Financial', 'Family', 'Health', 'Treatments', 'Legal', 'Housing', 'Transportation', 'Comments' (highlighted in orange), and 'A'. Below this is a table with columns 'Created', 'Staff Assigned', and 'Comments'. At the bottom, there are buttons for 'Edit Comment', 'Delete Comment', 'Print Comments', and 'Show Full Comments'. A footer bar contains buttons for 'Save', 'Customer Detail', 'Services', 'Activity', 'Correspond', 'WIOA Eligibility', 'Summary', and 'Comments'. Two green arrows point to the 'Comp Assess' and 'Comments' tabs.



# Assessment of Need → Customer Detail and Comp Assess

**Step 4:** Additional documentation of these assessments and their results should be captured in the **Comments tab in Comp Assess**

**Note:** Confidential information should be captured in Counseling Statements.

The screenshot displays the AOSOS system interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, there are sub-tabs: Customer Search, Comp Assess, Services, and Links. The main content area shows the 'Comp Assess' tab selected, with a green arrow pointing to it. The 'Counseling Statement' sub-tab is also selected, with a green arrow pointing to it. The interface includes a search bar for 'OSOS, Test A.' and fields for 'SSN: \*\*\*-\*\*-8999' and 'OSOS ID: NJ006318177'. Below the search bar, there are several tabs: <<, <, treatments, Legal, Housing, Transportation, Comments, Attachments, Case Load, Eligibility Document, and Counseling Statement. The 'Counseling Statement' tab is active, showing a table with columns for 'Date of Counsel', 'Staff', and 'Staff'. To the right of the table is a form with fields for 'Record Id', 'Counseling Date', 'Staff Name', and 'Counseling Statement'. At the bottom of the interface, there are buttons for 'Add', 'Delete', 'Print List', 'Help', 'Print Record', and 'Audit'. The footer contains buttons for 'Save', 'Customer Detail', 'Services', 'Activity', 'Correspond', 'WICA Eligibility', 'Summary', and 'Comments'.



# Short- and Long-Term Goals



## Achievement Objectives

**What are the specific progress points that will indicate the participant is on-track to meeting goals?**

(Note: These achievement objectives should demonstrate progress towards goals)



## Short-Term Goal

**What are short-term goals that the participant hopes to achieve in the near term?**

(Note: These short-term goals should align with long-term career goals)



## Long-Term Goal

**What is the long-term career goal that the participant hopes to achieve?**

(Note: This goal will take time and planning to achieve)



# Short- and Long-Term Goals → Services and Comp Assess

**Step 1:** Document specific details related to goals and achievement objectives:

- Achievement Objectives tab in Services
- Employment and Education tabs in Comp Assess

Customer Search Customer Detail Comp Assess **Services** HELP

OSOS, Test A. SSN: \*\*\*-\*\*-9384 OSOS ID: NJ00274482

Achievement Objectives Services Service History Enrollments Outcomes Empl. Outcomes Trng. Outcomes Comments A > >>

Employment Objective To gain employment in the computer field.

Goal Justification

Achievement Objectives

- Achievement Objective GED classes
  - Type of Goal Basic Skills Goal Attainment Attained
  - Planned Start Date 05/01/2012 Planned End Date 09/08/2012
  - Actual Start Date 05/01/2012 Actual End Date 06/01/2012
  - Evaluation Date 01/01/2012
  - Closure Reason
  - Outcome / Status

Achievement Objective	Type	Attainment
<input type="checkbox"/> GED classes	Basic Skills	Attained
<input type="checkbox"/> To Gain Employment	Basic Skills	Set, but attainment pending

New Objective Delete Objective Print

Save Customer Detail Comp Assess Comments Check Labor Market Information





# Short- and Long-Term Goals → Services and Comp Assess

**Step 2:** Document any additional details in the **Comments** tab in **Comp Assess**.

The screenshot displays the AOSOS web application interface. At the top, there are navigation tabs for 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. Below these, there are sections for 'Customer Search', 'Comp Assess', 'Services', and 'Links'. The 'Comp Assess' section shows the customer name 'OSOS, Test A.', SSN '\*\*\*-\*\*-9384', and OSOS ID 'NJ002744823'. A secondary set of tabs includes 'Employment', 'Education', 'Financial', 'Family', 'Health', 'Treatments', 'Legal', 'Housing', 'Transportation', and 'Comments'. The 'Comments' tab is highlighted with a green arrow. Below the tabs is a large blue text area for entering comments. At the bottom of the page are buttons for 'Save', 'Customer Detail', 'Services', 'Activity', 'Correspond', 'WIOA Eligibility', 'Summary', and 'Comments'.



# Barriers to Employment

**Skills Gaps:** Academic, occupational, and other work readiness skills

**Personal Life Circumstances:** Life situations that pose barriers to engagement in employment

**Technology:** Lack of technology; digital literacy needs



# Barriers to Employment → Comp Assess

**Step 1:** Barriers should be captured across the tabs in Comp Assess

The screenshot displays the 'Comp Assess' interface for a customer named 'OSOS, Test A.' with SSN: \*\*\*-\*\*-9384 and OSOS ID: NJ002744823. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a secondary navigation bar with 'Customer Search', 'Customer Detail', 'Comp Assess', and 'Links'. A third navigation bar contains sub-tabs: Employment, Education, Financial, Family, Health, Treatments, Legal, Housing, Transportation, Comments, and Attachments. The main content area is titled 'Monthly Financial Information' and is divided into two sections: 'Income' and 'Expense'. Each section has a table with columns for Source, Category, and Amount. Below the tables are 'Add', 'Modify', and 'Delete' buttons. At the bottom of the form, there are fields for 'Income Subtotal \$ 0.00', 'Expense Subtotal \$ 0.00', and 'Monthly Balance \$ 0.00'. A footer bar contains buttons for Save, Customer Detail, Services, Activity, Correspond, WIOA Eligibility, Summary, and Comments. Two green arrows are overlaid on the image: one points to the 'EMPLOYER' tab in the top navigation bar, and the other points to the 'Employment' sub-tab in the secondary navigation bar.

Income			Expense				
	Source	Category	Amount		Source	Category	Amount
<input type="checkbox"/>				<input type="checkbox"/>			

Income Subtotal \$ 0.00      Expense Subtotal \$ 0.00  
Monthly Balance \$ 0.00



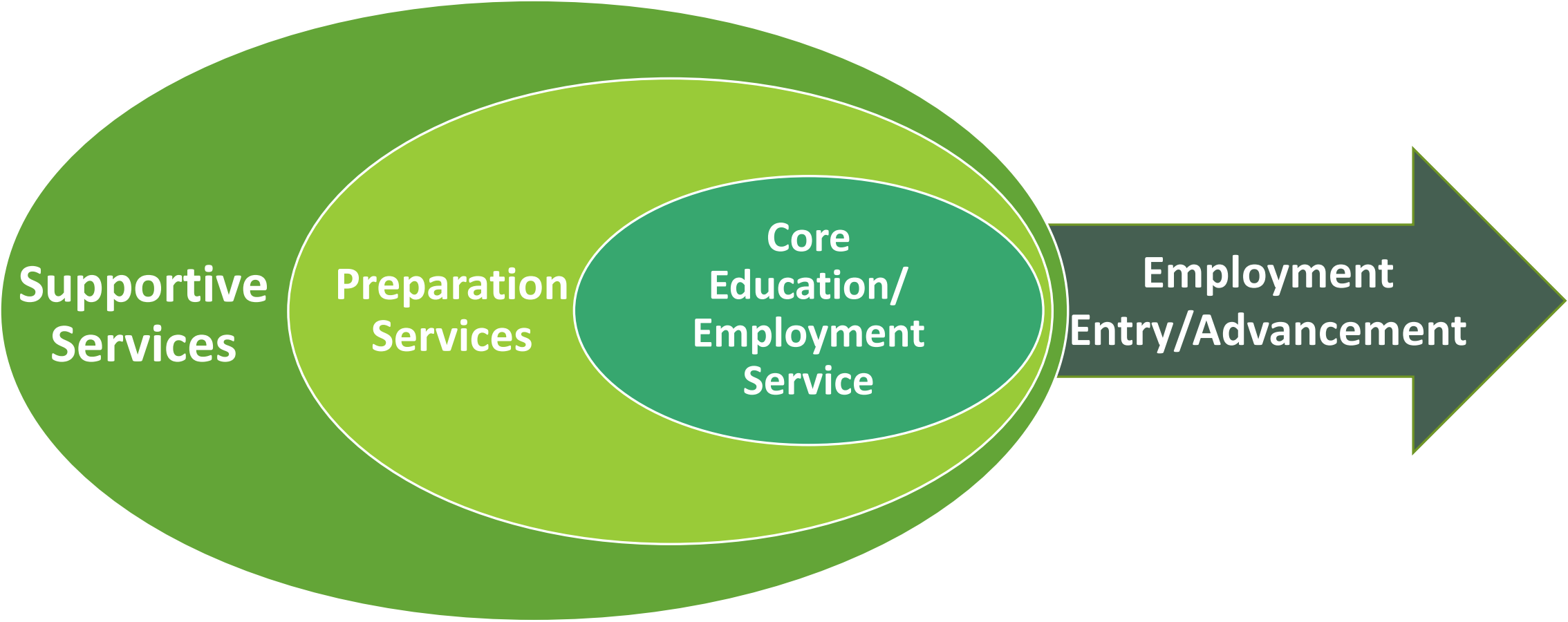
# Barriers to Employment → Comp Assess

**Step 2:** Additional documentation of barriers should be captured in the **Comments tab in Comp Assess**

The screenshot displays the AOSOS system interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, there are links for Customer Search, Comp Assess, Services, and Links. The main header shows the customer name OSOS, Youth R., SSN: \*\*\*-\*\*-9384, and OSOS ID: NJ002744823. A secondary navigation bar includes tabs for Employment, Education, Financial, Family, Health, Treatments, Legal, Housing, Transportation, Comments, and A. The 'Comments' tab is currently selected. Below this, there is a table with columns: Created, Staff Assigned, and Comments. The table is currently empty. At the bottom of the interface, there are buttons for Edit Comment, Delete Comment, Print Comments, and Show Full Comments. A footer bar contains buttons for Save, Customer Detail, Services, Activity, Correspond, WIOA Eligibility, Summary, and Comments. Two green arrows are overlaid on the image: one pointing to the 'Comp Assess' tab and another pointing to the 'Comments' sub-tab.



# Combination of Services



# Combination of Services → Services



# Planned and Actual WIOA Services → Services

**Step 1:** Designate and fund specific services that align with education, employment, and supportive services a participant is receiving in the **Services** tab in **Services**.

**Customer:** OSOS, Test A. **SSN:** \*\*\*-\*\*-9384 **OSOS ID:** NJ00274482

**Service Details:**

- Service Name: CDL
- Service Desc: Prerequisites: NA
- Service ID: 216711
- Service Type: Occupational Skills Training
- Provider Name: 160 Driving Academy - Rock Gate Capital, LLC - L
- Location Name: Rock Gate Capital, LLC - Monmouth
- Provider ID: 133344 Offering ID: 260947
- Plan. Start Date: Plan. End Date: 09/05/2020
- Actual Start Date: 08/20/2020 Actual End Date:
- Completed Successfully: Next Contact Date:
- Program Service Type: Non-ITA Training
- Part Time Learn.: Distance Learn.:

**Funding Table:**

Level	Source	Obligated	Actual	Oblig #

**Service List Table:**

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
Sample One-Stop	Transportation	05/05/2020		Youth Services
SS/IO Provider	SS/IO Provider Service	09/11/2018	09/11/2018	Basic Career Services



# Combination of Services → Services

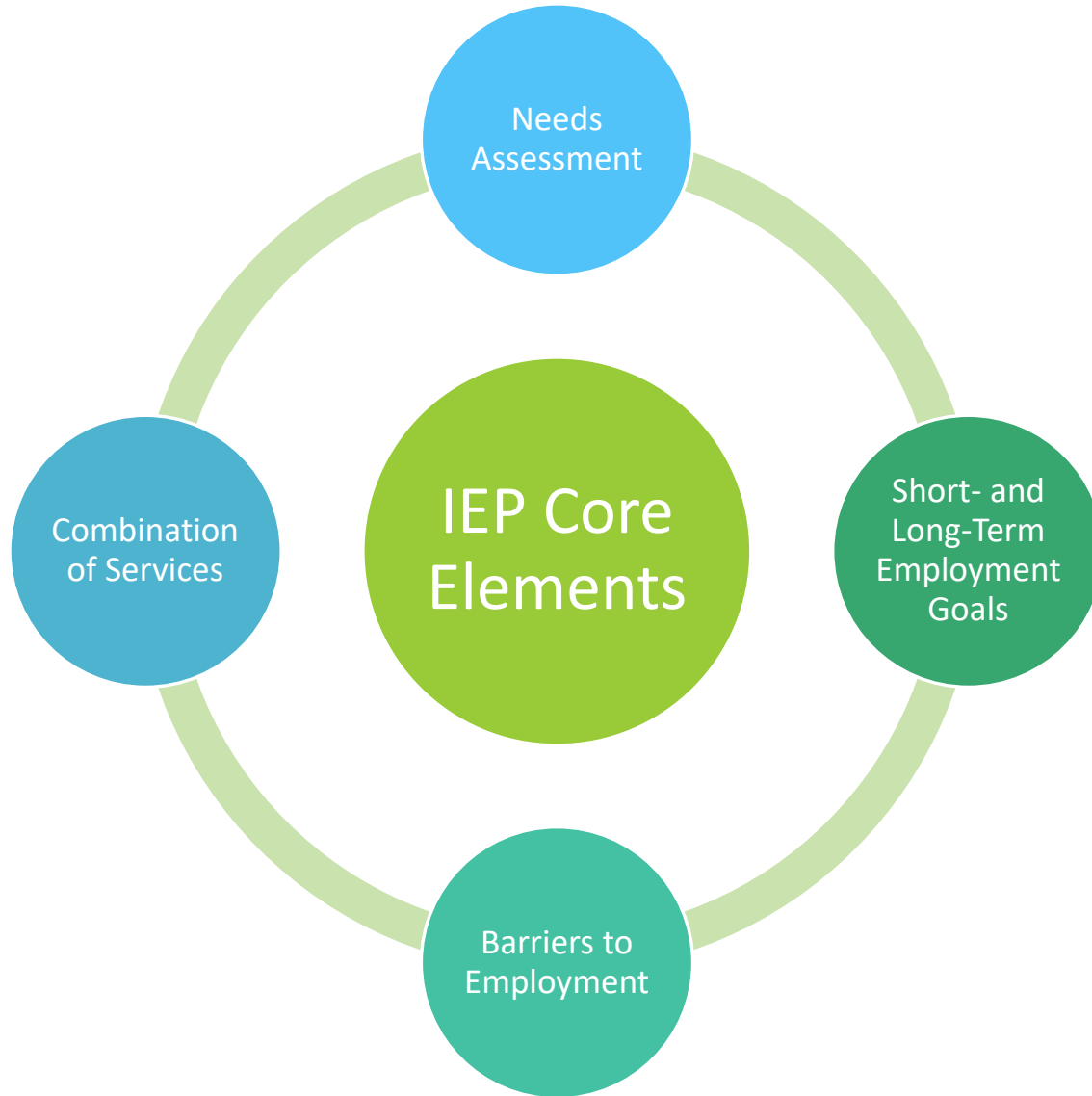
**Step 2:** Document specific details related to education, employment, and supportive service experiences in the **Comments tab in Services.**

The screenshot displays the AOSOS system interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, there are sub-tabs: Customer Search, Customer Detail, Services (highlighted in orange), and Links. The main content area shows customer information: Test A., OSOS, SSN: \*\*\*-\*\*-9384, and OSOS ID: NJ002744823. Below this, there are more sub-tabs: Achievement Objectives, Services, Service History, Enrollments, Outcomes, Empl. Outcomes, Trng. Outcomes, and Comments (highlighted in orange). A table with columns 'Created', 'Staff Assigned', and 'Comments' is visible. At the bottom, there are buttons for 'Edit Comment', 'Delete Comment', 'Print Comments', and 'Show Full Comments'. A footer bar contains buttons for 'Save', 'Customer Detail', 'Comp Assess', 'Comments', and 'Check Labor Market Information'. Two green arrows point to the 'Services' and 'Comments' tabs.





## Plan Components



## Plan Development and Use

### Additional Requirements

- ✓ An IEP is the foundational tool for engaging participants in individualized career services and case management.
- ✓ An IEP should be jointly developed in partnership with the participant.
- ✓ An IEP should reflect the unique goals and needs of an individual participant.
- ✓ An IEP should be used in an ongoing process to monitor and re-evaluate progress towards goals.
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# Plan Development and Use

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- ✓ **An IEP should ground a connected and seamless experience for customers.**



# Plan Development and Use

**Step 1:** An IEP activity should be designated every time there is engagement around the IEP in the **Activities** tab in **Customer Detail**.

The screenshot shows the AOSOS Customer Detail page for 'OSOS, Test A'. The 'Activities' tab is selected, displaying a list of activities. The 'Individual Employment Plan' activity is highlighted with a green box. A green arrow points to the 'Activities' tab in the navigation bar.

Activity	Activity Date	Office	Staff	Employer	...	...	...
<input type="checkbox"/> Common Measures Enrollment	06/07/2012	Mercer County One	Novatin, Jacqueline				Yes
<input type="checkbox"/> Common Measures Enrollment	08/19/2011	Trenton 1-Stop Car	Administrator, SelfS				No
<input type="checkbox"/> Common Measures Enrollment	01/08/2009	Workforce NJ Div o	zz-Forsythe, David				Yes
<input type="checkbox"/> Common Measures Enrollment	04/15/2008	Workforce NJ Div o	Novatin, Jacqueline				Yes
<input type="checkbox"/> Eligibility Determination	05/01/2020	Burlington 1-Stop C	Novatin, Jacqueline				No
<input type="checkbox"/> GA - 28 Day Completion	06/12/2012	Elizabeth 1-Stop C	Novatin, Jacqueline				No
<input type="checkbox"/> GA - 28 Day Initiated	06/11/2012	Elizabeth 1-Stop C	Novatin, Jacqueline				No
<input type="checkbox"/> GA - Final Report of Non-Compliance	06/12/2012	Workforce NJ Div o	Novatin, Jacqueline				No
<input type="checkbox"/> GA - Final Report of Non-Compliance	06/12/2012	Workforce NJ Div o	Novatin, Jacqueline				No
<input type="checkbox"/> GA - Non-Compliance Event	06/12/2012	Union Co Div Socia	Bynes-James, Cynt				No
<input type="checkbox"/> Individual Employment Plan	05/01/2020	Burlington 1-Stop C	Novatin, Jacqueline				No
<input type="checkbox"/> Labor Exchange Enrollment	05/01/2020	Burlington 1-Stop C	Novatin, Jacqueline				Yes
<input type="checkbox"/> Labor Exchange Enrollment	09/11/2018	Trenton 1-Stop Car	zz-OnRamp, Trentc				No
<input type="checkbox"/> Labor Exchange Enrollment	03/06/2017	Trenton 1-Stop Car	zz-OnRamp, Trentc				No
<input type="checkbox"/> Labor Exchange Enrollment	06/05/2016	Trenton 1-Stop Car	zz-OnRamp, Trentc				No
<input type="checkbox"/> Labor Exchange Enrollment	06/07/2012	Mercer County One	Novatin, Jacqueline				Yes
<input type="checkbox"/> Labor Exchange Enrollment	08/19/2011	Trenton 1-Stop Car	Administrator, SelfS				No
<input type="checkbox"/> Labor Exchange Enrollment	01/08/2009	Workforce NJ Div o	zz-Forsythe, David				Yes
<input type="checkbox"/> Labor Exchange Enrollment	04/15/2008	Workforce NJ Div o	Novatin, Jacqueline				Yes
<input type="checkbox"/> Labor Exchange Registration	11/08/2006	Workforce NJ Div o	Novatin, Jacqueline				No
<input type="checkbox"/> Not Hired	10/28/2012	NJDOL Trenton Ce	Administrator, Batc				No



# Plan Development and Use

**Step 2:** Details about IEP points of engagement should be documented in **Comments in Services.**

The screenshot displays the AOSOS system interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, there are sub-tabs: Customer Search, Customer Detail, Services (highlighted in orange), and Links. The main content area shows customer information: OSOS, Test A., SSN: \*\*\*-\*\*-9384, and OSOS ID: NJ002744823. Below this, there is a row of tabs: Achievement Objectives, Services, Service History, Enrollments, Outcomes, Empl. Outcomes, Trng. Outcomes, and Comments (highlighted in orange). A large green arrow points from the 'EMPLOYER' tab to the 'Services' sub-tab, and another green arrow points from the right side to the 'Comments' tab. The main content area is a large, empty light blue box. At the bottom, there are buttons for Edit Comment, Delete Comment, Print Comments, and Show Full Comments. Below that, there is a footer bar with buttons for Save, Customer Detail, Comp Assess, Comments, and Check Labor Market Information.



# Plan Development and Use

**Step 3:** The paper IEP should be uploaded each time it is updated as an Attachment in the **Attachments tab** in **Comp Assess**.

The screenshot shows the AOSOS system interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, there are buttons for Customer Search, Comp Assess, Services, and Links. The main content area shows the 'Attachments' tab selected, with a green arrow pointing to it. The 'Attachment Type' dropdown menu is highlighted with a green box and a green arrow, showing 'IEP/ISS' selected. Below the dropdown is a text area for 'NOTES' and an 'Upload Attachment' button. To the right, there are input fields for Staff (Singer Quast, Sarah), Office, File Name, and Last Modified. At the bottom, there is a table with columns: Date Added, Attachment, Type, Source, and Staff. The table contains one row with a checkmark in the first column, the date 02/22/2021, and the type IEP/ISS. Below the table are buttons for Add Attachment, File Type, Download Attachment, and Delete Attachment. At the very bottom, there are buttons for Save, Customer Detail, Services, Activity, Correspond, WIOA Eligibility, Summary, and Comments.

Date Added	Attachment	Type	Source	Staff
<input checked="" type="checkbox"/>	02/22/2021	IEP/ISS		Singer Quast, Sarah



# Plan Development and Use

**Step 4:** Elements of the IEP may also be recorded and documented in the **Employment Plan tab** in Customer Detail

The screenshot displays the AOSOS Customer Detail interface. At the top, there are navigation tabs: CUSTOMER (highlighted), PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Detail (highlighted), Comp Assess, Services, and Links. The main header shows 'OSOS, Test A', 'SSN:', and 'OSOS ID: NJ006785998' with '1 of 1' on the right. A secondary row of tabs includes '<<', '<', 'ace', 'WFNJ Hours', 'WFNJ', 'Additional Follow-up', 'Program Tracking', 'Unsubscribe', 'Keywords', 'Tuition Waiver', and 'Employment Plan' (highlighted). The 'Employment Plan' section contains a table with columns 'Record Id', 'Create Admin', and 'Creation Time'. To the right, there are input fields for 'Record Id', 'Demographics' (Last Name: OSOS, First Name: Test, County: Monmouth, One-Stop Office, Date), 'Work Plan' (Reemployment Career Goal, O\*Net Title), and 'Barriers' (five Barrier input fields). At the bottom, there are buttons for 'Add', 'Delete', 'Print List', 'Help', 'Print Record', and 'Audit'. A footer bar contains buttons for 'Save', 'Start Match', 'Services', 'Comp Assess', 'Activity', 'I.A. Referrals', 'Correspond', 'IVR', 'Ret to Srch', 'Comments', 'Tag', 'Resume', 'Schd', and 'Message'. Green arrows point to the 'CUSTOMER' tab, the 'Employment Plan' tab, and the 'Record Id' field.



# Plan Development and Use

**Step 4:** Elements of the IEP may also be recorded and documented in the **Employment Plan** tab in Customer Detail

The screenshot displays the AOSOS Customer Detail interface. At the top, there are navigation tabs: CUSTOMER (selected), PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail (selected), Comp Assess, Services, and Links. The main header shows customer information: OSOS, Test A., SSN: [redacted], and OSOS ID: NJ006785998. A secondary navigation bar includes: <<, <, >, >>, WFNJ Hours, WFNJ, Additional Follow-up, Program Tracking, Unsubscribe, Keywords, Tuition Waiver, and Employment Plan (selected). The Employment Plan section contains a table with columns: Record Id, Create Admin, and Creation Time. To the right of the table are three main sections: 1. Return Date 2 Reported: Includes a date field and a comments text area. 2. Customer Statement: Contains a paragraph of text and a signature line with a date field (04/11/2019). 3. Customer Outcomes: Includes an outcomes text field and a comments text area with the text "Please reference the client's folder." At the bottom of the form are buttons for Add, Delete, Print List, Help, Print Record, and Audit. A footer bar contains various system navigation buttons: Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message. Green arrows point to the Employment Plan tab and the Customer Outcomes section.



# Additional Resources

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## **NJDOL Policy**

NJ Workforce Innovation notices including WD-PY19-8 that outlines specific IEP policy can be found here:

<https://www.nj.gov/labor/wioa/resources/>

## **AOSOS Training Videos**

Specific tutorials about entering Activities and Comments, the tabs in Customer Detail, and the tabs in Comp Assess can be found here:

<https://towork.dol.state.nj.us/aosotrainingmaterials/layouts/15/start.aspx#/>

