Dashboards provide real-time data showing where customers are in the intake/eligibility process all the way up through program completion. Partners can use the data in the dashboard to access filtered lists of customers for easy access to customer program information.

Section/Definitions Column: Includes sections/components of the program. The icon provides a definition for the item in the section. Color-coding is used to identify the action needed for customers. The definitions are listed in the sample below.

Section and Definitions	Count	%
1. Topic		
White Color Code = FYI only. No action is needed.	2	20%
Yellow Color Code = Action is needed. These numbers are not included in the loss/pass rates.	2	20%
Red Color Code = Red flag -Immediate action is needed. These numbers are not included in the loss/pass rates. Next Steps	2	20%
Green Color Code = This step is complete or meets a program requirement.	4	40%
Grey Color Code = This person is either not able to participate or quit participating in the program.	2	20%
Total	**10**	

- Next Steps – Next Steps opens in a modal window and includes next steps and related instructions/procedures.

Outreach	Info Bubble text	Next Steps Text
Customer with Inquiry Status	Customers who have not completed the prescreening process and have not been marked as do not contact.	
Prescreening Complete and results indicate Eligible and Interested in participating	Customers who have both completed the pre-screening, have been found eligible, and are interested in the program.	
Follow-up is past due	The prescreening follow-up date has passed and the customer status is still prescreening.	
Prescreening has not been completed within 30 days	Customers who have had an inquiry status or prescreen status for more than 30 days.	Contact the customer and work with them to complete the application. Update their status to do not contact if they are not interested in the program.

Do Not Contact	Customer status has been updated to indicate the customer does not want to be contacted.	
Prescreening Results indicate Not Eligible or Not Interested	Prescreening was complete and the results indicate the customer is not eligible or not interested.	
Intake		
Application		
Complete and Eligible	Customer application is complete, identified as eligible, and they are interested in participating in the program.	
Complete and does not want to participate	Customer application is complete, identified as eligible, and they are not interested in participating in the program. Their status is Not Enrolled – Customer Declined to Participate.	
Application is not complete	The customer's application is not complete, and it has been 9 days or less since prescreening was completed.	
Application has not been completed within 10 days	The customer's application is not complete, and it has been at least 10 days since prescreening was completed.	Contact the customer and work with them to complete the application. If they do not want to participate, update their status to Not Enrolled – Customer Declined to participate.
Career Assessment		
Complete	The customer has a completed career assessment.	
Not complete	The customer's career assessment is not complete, and it has been 9 days or less since the application was completed.	
Not Complete within 10 days of application completed	The customer's career assessment is not complete, and it has been at least 10 days since the application was completed.	Go to the customer's intake page and complete the career assessment.
Customer Needs Assessment		
Complete	The customer has a completed service needs assessment.	

Not complete	The customer's service needs assessment is not complete, and it has been 9 days or less since the application was completed.	
Not Complete within 10 days of application completed	The customer's service needs assessment is not complete, and it has been at least 10 days since the application was completed.	Go to the customer's intake page and complete the service needs assessment.
Referrals		
Customers that do not require a referral	Customers who have the box checked to indicate the customer does not require a referral.	
Customers Current Referral Status		
Referral(s) was sent and has not received a response, or has a pending response	Customers who have a referral(s) that was sent and has not received a response or has a pending response up to 9 days after sending the referral.	
A referral is required based on the Service Needs Assessment, but one has not been sent, Next Steps	Customers who require a referral, but one has not been sent.	Go to the customer's referral tab. Send the required referral. If the referral is no longer needed, then update the Service Needs Assessment by unchecking the referral need and save the results.
Open Referral(s) was sent; no response from service provider after 10 days, Next Steps	Customers who have an open referral(s) that was sent, but service provider has not responded after 10 days.	Go to the customer's referral tab. Identify the outstanding referral and either resend the referral or cancel the referral.
Referral(s) was sent, service provider responded, but customer has not responded to the service provider, Next Steps	Customers who have a referral(s) that was sent and received a response is Pending - no contact from customer.	Contact the customer to see if they are going to move forward with the referral. Go to the customer's referral tab. Send the required referral. If the referral is no longer needed, then update the service needs assessment by unchecking the referral need and save the results.
Referral(s) was sent and received a response as accepted, rejected, or closed.	Customers who have a referral(s) that was sent and received a response as accepted	

	or rejected, or the partner closed the referral.	
Total Referrals Made (Show/Hide)		
# of customers with at least one referral for **Housing Assistance**		
# of customers with at least one referral for **Transportation**		
# of customers with at least one referral for **Dependent Care**		
# of customers with at least one referral for **Legal Aid**		
# of customers with at least one referral for **Health Care**		
# of customers with at least one referral for **Uniforms**		
# of customers with at least one referral for **Other Support Services**		
Service Status		
Service Needs Assessment Items & Other Wrap-Around Services (Use Services Cost Report for details.)		
Customers who have one or more support/barrier reduction services identified in the Service Needs Assessment that still need to be addressed.	Number of Customers who have one or more support/barrier reduction services or referrals identified in the Service Needs Assessment that still need to be addressed.	
Customers who have all support/barrier reduction services identified in the Service Needs Assessment have been addressed.	The number of customers who have all support/barrier reduction services identified in their Service Needs Assessment has been addressed.	
Customers who have an estimated cost	Customers who have an estimated cost that needs to be updated.	
Customers with completed support/barrier reduction service	Customers with completed support/barrier reduction service	
Career Plan Services (Use Services Report for details.)		
Customers who have at least one service where start/completion status does not meet deadlines set with the start/end dates	Customers who have at least one service where start/completion status does not meet deadlines set with the start/end dates.	
Customers who do not have training/career services (Next Steps)	Customers who do not have training/career services.	Go to the customer's Training/Services tab. If the customer does not have a goal listed, add a goal. Add a

		service/activity. Assign it to the goal and enter the required information.
Customers who have all their training/career services start/completion statuses meet the deadlines set with the start/end dates	Customers who have all their Training/Career services start/completion statuses meet the deadlines set with the start/end dates.	
Customers who are not meeting attendance requirements		
Customers who need to have a post-assessment added to their training service.		
Customers who have one or more training services that do not meet the post-assessment criteria.		
# of Active Customers with an Open Service (unduplicated)		
Earned Credential		
Customers who are in training services and do not have a credential entered the system	Customers who are in a training service and do not have a credential entered in the system.	
Customers who earned an Industry-Linked Credential, Certification, or License	Customers who earned an Industry-Linked Credential, Certification, or License	
Completion Information		
In Progress	Customers who are participating in the program.	
Completed	Customers who have completed all training modules (services) and have a program completion status of complete	
Exited with Follow-up	Customers who have all services marked as complete or withdrawal. Follow up is needed.	
Exit with No Follow-up	Customers who have all services marked as complete or withdrawal. Follow up is no longer needed.	
Withdrew	Customers withdrew from the program.	
Transition Outcomes	Only those who “complete” in the following sections and those who exit and no follow-up is needed	

Apprenticeship	This data comes from the customer's program completion/follow-up information	
Applied/Waitlisted		
Accepted		
Denied		
Entered		
Job Placement	This data comes from the customer's program completion/follow-up information	
In Clean Energy		
Transition Job		
Not a Transition Job		
Not in Clean Energy		
Transition Job		
Not a Transition Job		
Other Training	This data comes from the customer's program completion/follow-up information	
Program Follow-Up		**For customers who are Complete, Exited and Follow-up Needed**
Completed/On schedule	Follow-up is current. This data comes from the customer's program completion/follow-up information	
Past due for follow-up *(trigger once follow-up date has passed)*	Follow-up is overdue. This data comes from the customer's program completion/follow-up information	Contact the customer and update their follow-up information.
1-month follow-up		
2-month follow-up		
3-month follow-up		
6-month follow-up		
9-month follow-up		
12-month follow-up		
24-month follow-up		
36-month follow-up		