

# **COVID-19 Disaster Recovery Dislocated Worker Grant OSOS Guide**



## Table of Contents

Purpose .....	1
Searching for the Customer .....	2
Quick Search .....	3
Basic Customer Record .....	9
Basic Customer Record Details .....	10
Case Notes .....	16
Comprehensive Assessment .....	17
Services .....	21
Closing a Service.....	32
Resources and Assistance .....	34

## PURPOSE

New York State Department of Labor (NYSDOL) is partnering with Local Workforce Development Boards (LWDBs) as project operators to coordinate local disaster relief employment projects in the hardest impacted counties. The LWDBs will identify worksite employers to provide a variety of critical clean-up and humanitarian services within their local areas. LWDBs will coordinate with worksite employers to fund the wages and fringe of eligible participants as temporary workers in roles including, but not limited to contact tracing, vaccination administration, sanitizing of public spaces (e.g., schools), and distribution of essential supplies (e.g., food, water, medication) to infirm, quarantining, or otherwise housebound individuals. Supportive services needed to carry out the disaster-relief projects will be provided as needed.

The One-Stop Operating System (OSOS) is the primary case management system used for tracking all services provided to customers throughout the Workforce Development System. OSOS collects substantial information from customers, businesses, and training providers. This information is also used to prepare required State and Federal reports.

This guide provides instructions on how to conduct the OSOS data entry for the COVID-19 Disaster Recovery DWG.

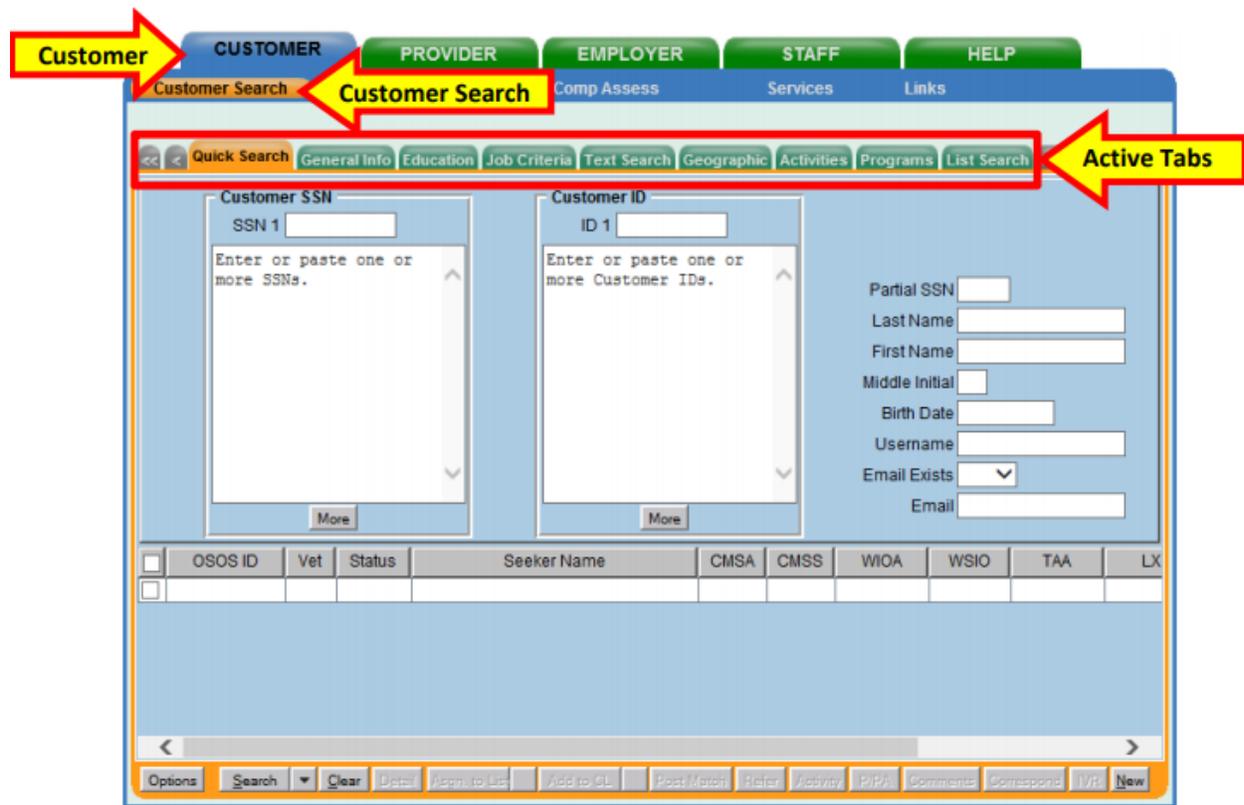
The following Local Workforce Development Areas received this grant:  
Chautauqua County, Dutchess County, New York City, Niagara County, Onondaga County, Rockland County, Suffolk County, Sullivan County and Putnam / Westchester.

## SEARCHING FOR THE CUSTOMER

When staff enter customer data into OSOS, it is important to determine if a record already exists for the customer. In addition, there may be instances where there are two existing records, or duplicate records, for the customer. When this occurs, we often see that one account has a Social Security Number and one does not. Following the instructions below ensures that any duplicate records can be found and addressed accordingly.

Searches are performed within the **Customer Search** window, in the **Customer** module.

While searches are most commonly performed from the **Quick Search** tab, any of the active tabs can be used in the search process. In addition, once you are case managing a customer, and their Customer ID is known, you may search for the customer using the Customer ID field.



## QUICK SEARCH

A customer search is most commonly performed from the **Customer Search** window, **Quick Search** tab. There are numerous ways a customer search can be conducted depending on the information the staff has obtained. Staff will mainly search by **Customer Full** or **Partial Name**.

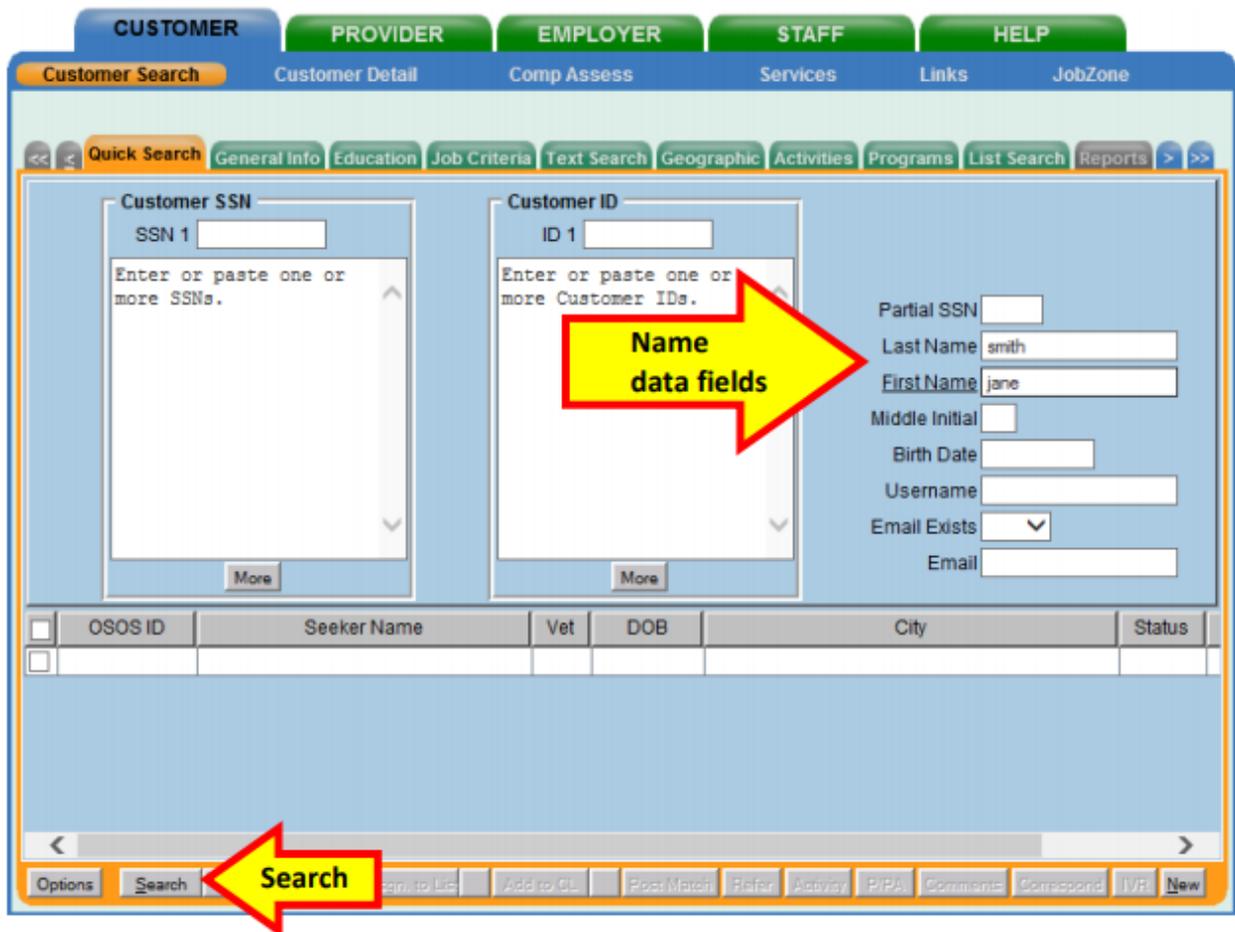
### SEARCHING BY CUSTOMER FULL OR PARTIAL NAME

Staff may search for a customer record by full or partial name. Enter as much information as is known in the **Last Name** and **First Name** data fields.



*As a best practice, staff should perform a name search for any customer they are working with to determine if duplicate OSOS records exist for the same customer. If a duplicate record is found, please contact [help.osos@labor.ny.gov](mailto:help.osos@labor.ny.gov).*

Click the **Search** button.

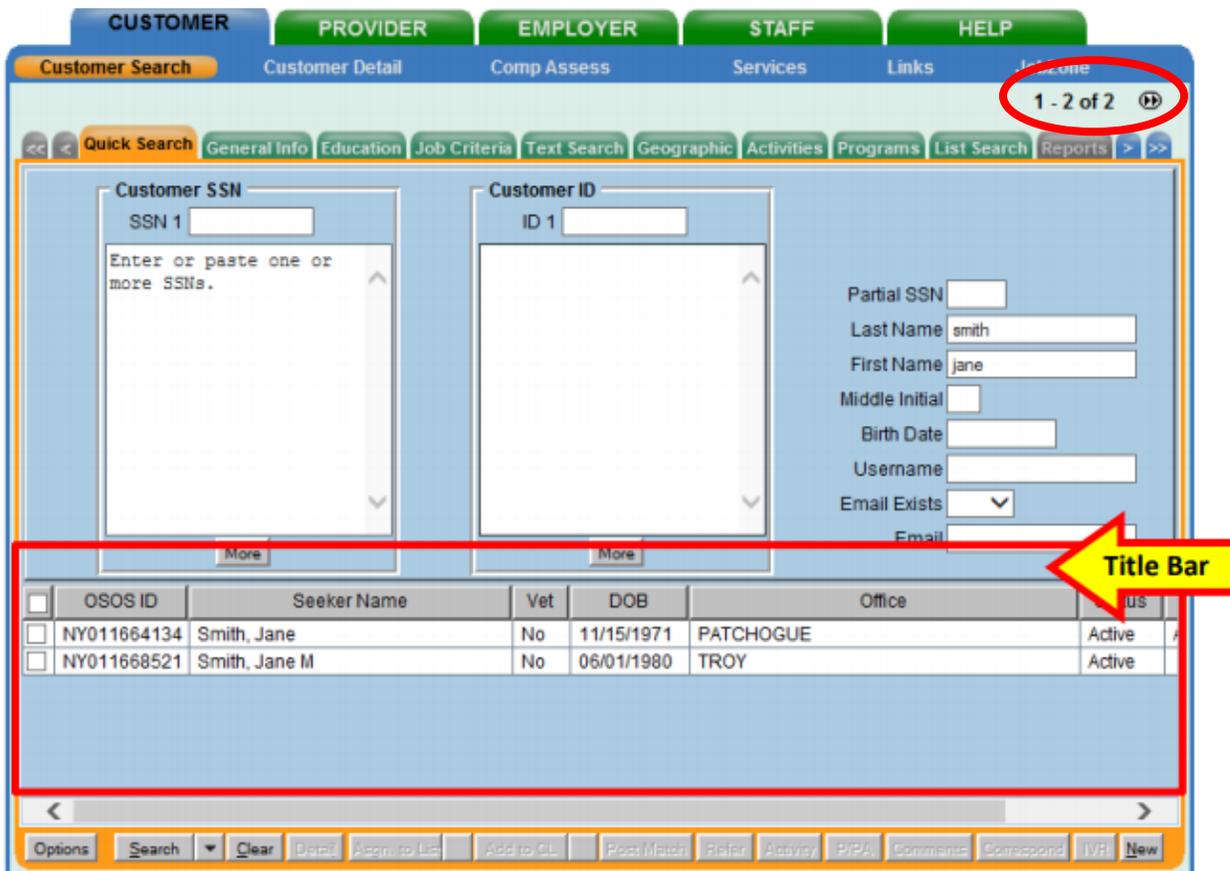


The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The 'Quick Search' sub-tab is selected. The main search area contains two large text input fields for 'Customer SSN' and 'Customer ID'. To the right, there are smaller input fields for 'Partial SSN', 'Last Name' (with 'smith' entered), 'First Name' (with 'jane' entered), 'Middle Initial', 'Birth Date', 'Username', 'Email Exists' (a dropdown menu), and 'Email'. A yellow arrow points to the 'Last Name' and 'First Name' fields with the text 'Name data fields'. At the bottom of the interface, there is a 'Search' button, also highlighted with a yellow arrow. Below the search area is a table with columns for OSOS ID, Seeker Name, Vet, DOB, City, and Status.

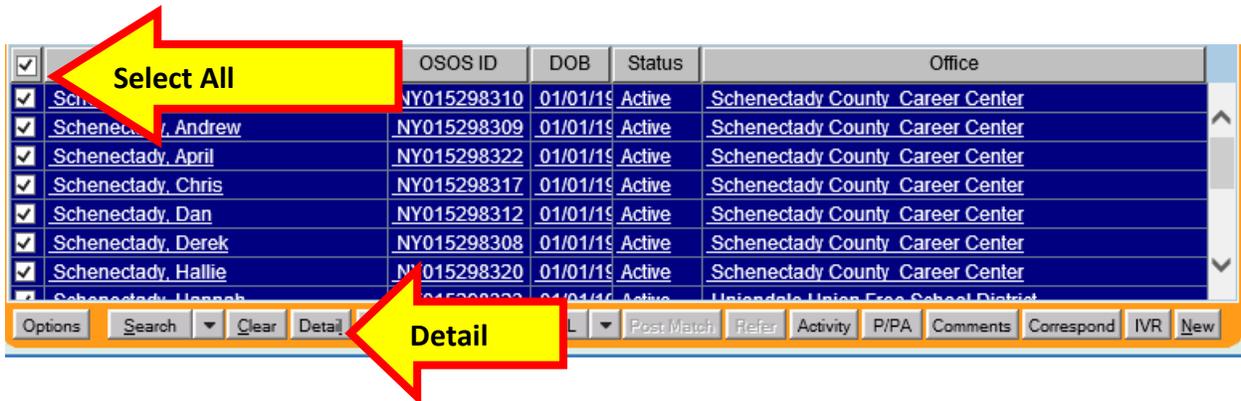
If there is only one result returned, OSOS will display the customer's record. It will default to the **General Information** tab of the **Customer Detail** window.



If there is more than one customer record matching the search criteria, the customers' information will be displayed in the window below the data entry fields.



If the search yields more than one result, staff can view all the records by first clicking on the check box in the top left-hand corner of the gray title bar. This will select all the results. Staff can then click on **Detail** at the bottom of the screen to review all selected customer records.



The screenshot shows a table of search results with columns for OSOS ID, DOB, Status, and Office. A yellow arrow labeled "Select All" points to the top-left checkbox. Another yellow arrow labeled "Detail" points to the "Detail" button in the bottom toolbar.

<input type="checkbox"/>	OSOS ID	DOB	Status	Office
<input checked="" type="checkbox"/>	NY015298310	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298309	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298322	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298317	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298312	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298308	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298320	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298323	01/01/19	Active	Uniondale Union Free School District

Toolbar: Options Search Clear Detail Post Match Refer Activity P/PA Comments Correspond IVR New



OSOS will display the customer record of the first customer selected. Use the arrows at the top right corner of the screen to toggle through the customer records. Staff can review the records to identify the customer they were searching for, as well as to identify potential duplicate records.

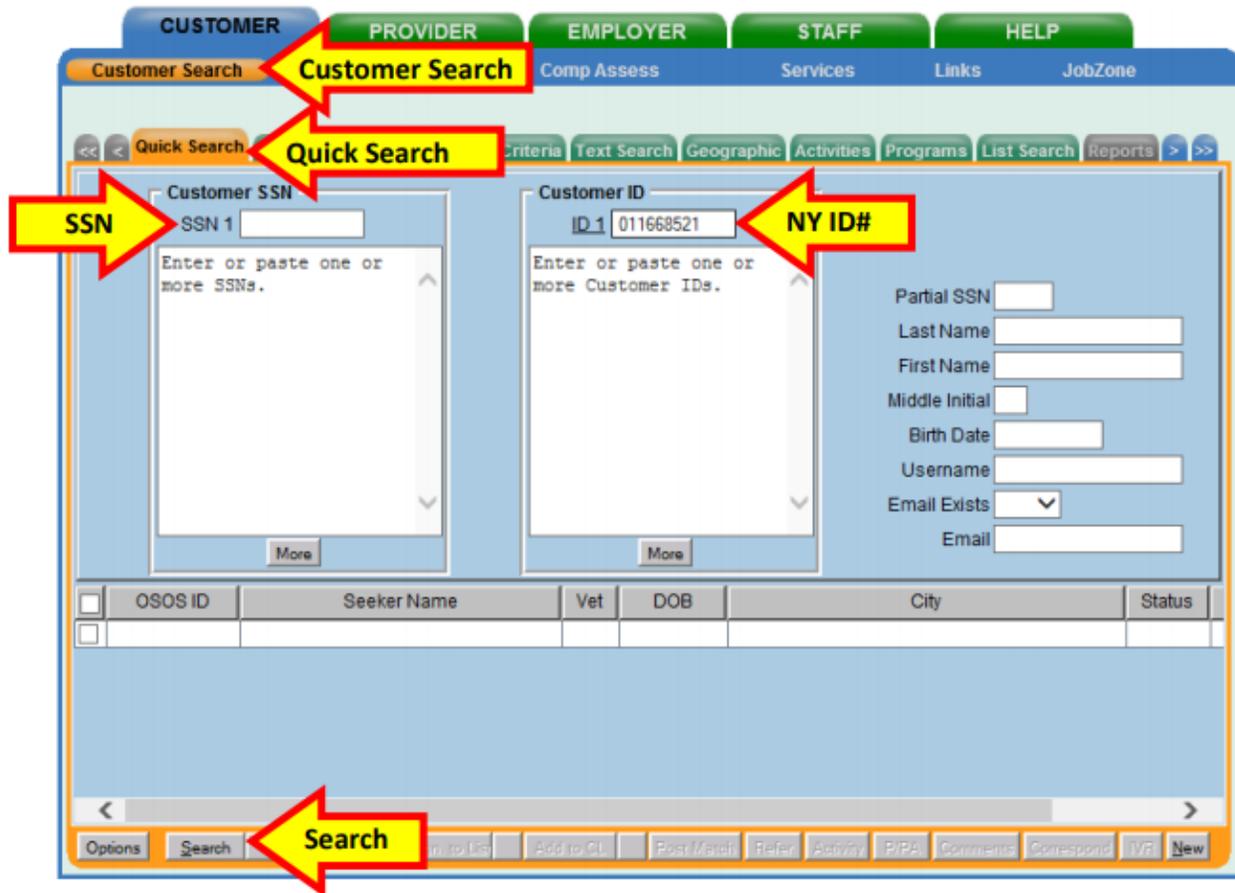
The screenshot displays the OSOS Customer Detail page for Jane Smith. The page is organized into several sections:

- Customer Data:** Includes fields for SSN, Status (Active), Job Seeker (Active), Username (testsmith123), Password (password), Last Name (Smith), First Name (Jane), MI, Date of Birth (06/01/1980), Gender (Female), Portfolio Lvl. (JobZone Adult), Address (123 Main Street), City (Albany), State (New York), Zip (12206), County (Albany), Country (United States), Metro, Phone (518-555-5555), Email (janesmith@test.edu), and URL. There are also checkboxes for U.S. Citizen and JZ/CZ Manager, and an 'Add to Case Load' button.
- Customer Assignment:** Shows Staff Assigned, WIB Assigned (Albany/Rensselaer/Schenectady Counties), Agency (Department of Labor), Office (ALBANY), and UI Claimant. It also includes fields for Registered (03/08/2017), Origin (Staff), Profiled, Profiled Date, and Internet Resume/Confidential checkboxes.
- Navigation:** At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail (selected), Comp Assess, Services, Links, and CareerZone. A red arrow points to the 'Toggle Arrows' icon in the top right corner.
- Footer:** A row of buttons at the bottom includes Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.

### SEARCHING BY FULL SOCIAL SECURITY NUMBER OR NY ID

Once staff are case managing a particular customer, they can search by **Customer SSN** or **Customer ID** in the **Quick Search** tab to find the customer record.

Then click the **Search** button at the bottom of the screen.



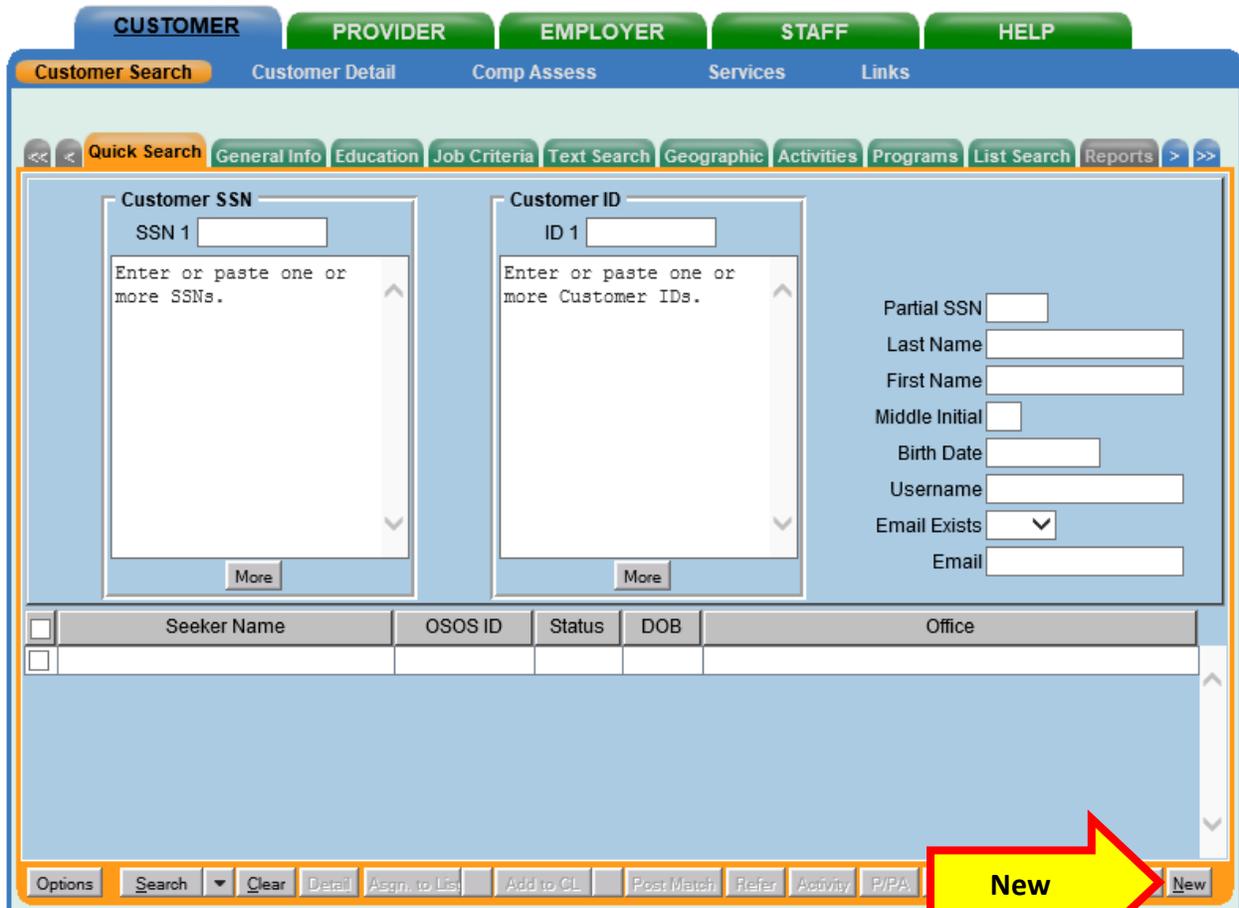
The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Comp Assess, Services, Links, and JobZone. The 'Customer Search' sub-tab is active, and within it, the 'Quick Search' sub-tab is selected. The 'Quick Search' section contains two main input areas: 'Customer SSN' and 'Customer ID'. The 'Customer SSN' field has a sub-field 'SSN 1' and a text area for entering or pasting SSNs. The 'Customer ID' field has a sub-field 'ID 1' with the value '011668521' and a text area for entering or pasting Customer IDs. To the right of these fields are additional search criteria: Partial SSN, Last Name, First Name, Middle Initial, Birth Date, Username, Email Exists (dropdown), and Email. Below the search fields is a table with columns: OSOS ID, Seeker Name, Vet, DOB, City, and Status. At the bottom of the interface is a 'Search' button, which is highlighted with a red arrow.

If there is a matching record, OSOS will display the customer's record. If there is no matching record, the system will display **No Matches Found** in the upper right-hand corner.



*The search can be based on either SSN or ID number, but it cannot be based on both. Including data in both the **Customer SSN** field and the **Customer ID** field will result in an error message.*

If an existing customer record cannot be found, click the **New** button at the bottom of the screen to create a new customer record.



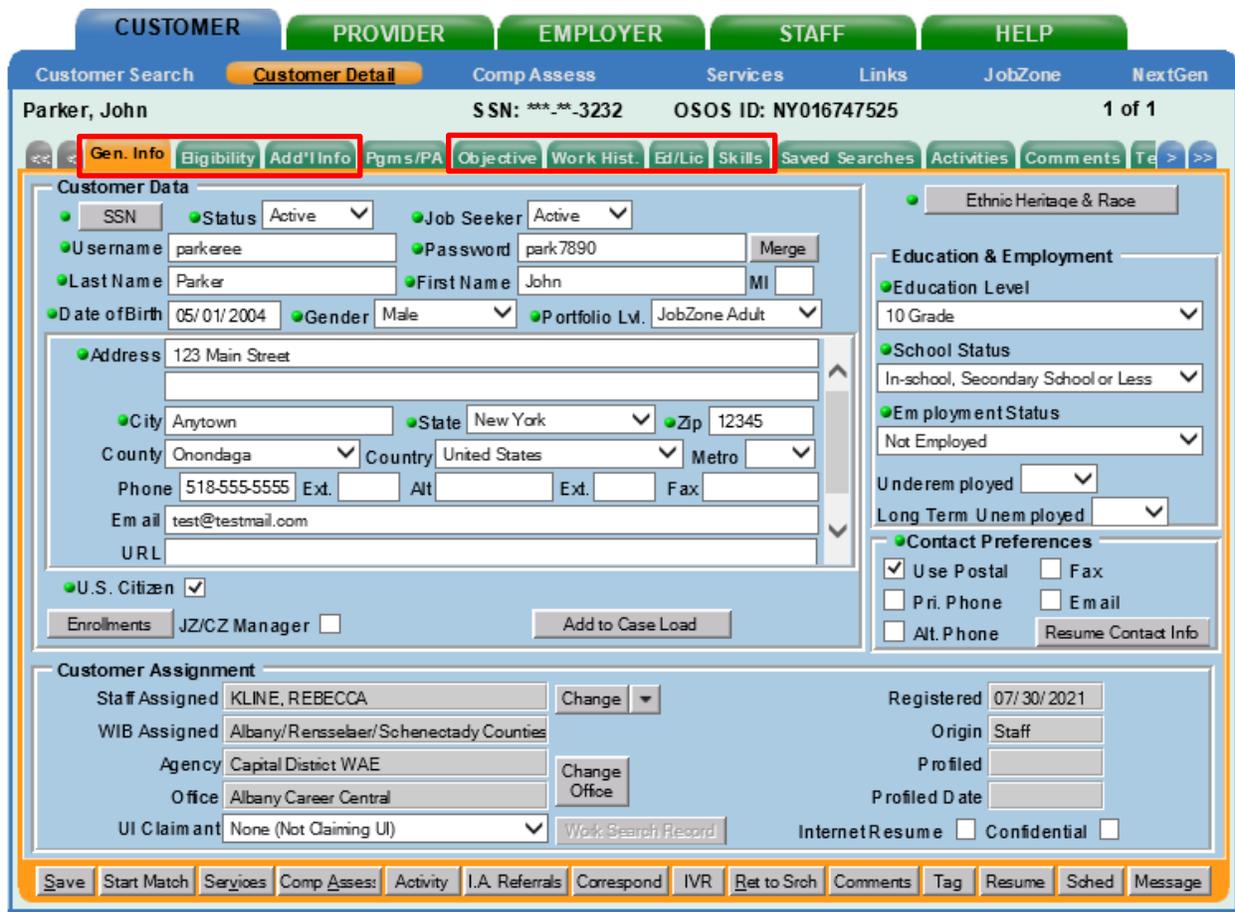
For detailed information on searching for a customer record, please see the [Performing a Customer Search OSOS Guide](#).

For detailed information on creating a customer record, please see the [Creating a Basic Customer Record OSOS Guide](#).

## BASIC CUSTOMER RECORD

Creating or updating a basic customer record requires data entry in seven tabs. These tabs are located in the **Customer** module, **Customer Detail** window. They are:

- **Gen. Info** tab (General Information)
- **Eligibility** tab
- **Add'l Info** tab (Additional Information)
- **Objective** tab
- **Work Hist.** tab (Work History)
- **Ed/Lic** tab (Education/Licenses)
- **Skills** tab



**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

Customer Search **Customer Detail** Comp Assess Services Links JobZone NextGen

Parker, John SSN: \*\*\*-\*\*-3232 OSOS ID: NY016747525 1 of 1

Gen. Info Eligibility Add'l Info Pgms/PA Objective Work Hist. Ed/Lic Skills Saved Searches Activities Comments Te >>

**Customer Data**

SSN  Status Active  Job Seeker Active  
 Username parkeree  Password park7890 Merge  
 Last Name Parker  First Name John MI  
 Date of Birth 05/01/2004  Gender Male  Portfolio Lvl JobZone Adult

Address 123 Main Street  
 City Anytown  State New York  Zip 12345  
 County Onondaga  Country United States  Metro  
 Phone 518-555-5555 Ext. Alt. Ext. Fax  
 Email test@testmail.com  
 URL  
 U.S. Citizen

Enrollments JZ/CZ Manager  Add to Case Load

**Customer Assignment**

Staff Assigned KLINE, REBECCA Change  
 WIB Assigned Albany/Rensselaer/Schenectady Counties  
 Agency Capital District WAE Change Office  
 Office Albany Career Central  
 UI Claimant None (Not Claiming UI) Work Search Record Internet Resume  Confidential

Registered 07/30/2021  
Origin Staff  
Profiled  
Profiled Date

Save Start Match Services Comp Assess Activity I.A. Referrals Correspond IVR Ret to Sroh Comments Tag Resume Sched Message



*All required fields in OSOS are indicated by a green dot ● in front of the field name.*

To save the basic customer record, all required fields must be completed. However, to best serve the customer, staff should always enter as much information as possible.



*Do not click Save until all the required information, in all tabs, is recorded for the complete basic customer record. If Save is selected before the data is completely entered, it will generate an error message. If this error message does appear, you will still be able to continue with the record by clicking OK and continuing to enter the information. Instead, when creating the customer record, simply select the next appropriate tab. Click Save when all the required information has been entered.*

Staff must review all of the information in the customer record each time they work with the customer. This ensures that the record reflects the most up to date and accurate information.

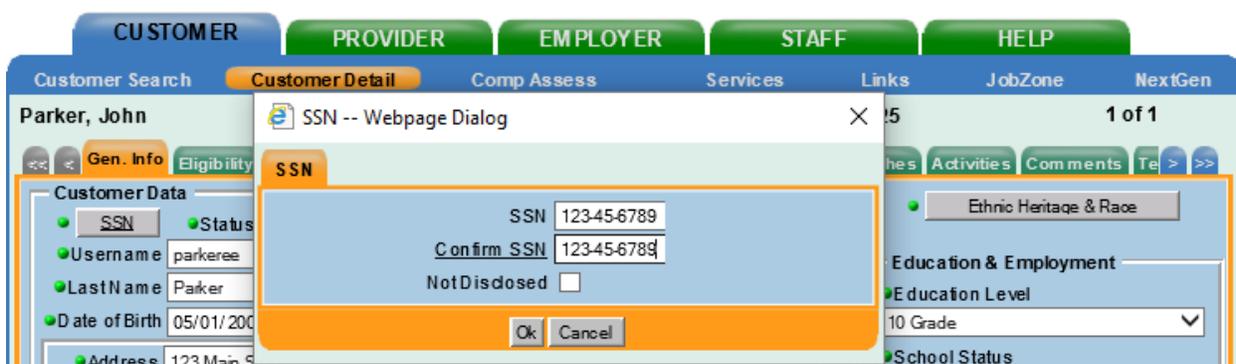
## BASIC CUSTOMER RECORD DETAILS

For detailed instructions on creating a basic customer record, please see the [Creating a Basic Customer Record OSOS Guide](#).

Below are some noteworthy points for filling out the tabs located within the **Customer Detail** window.

### General Info Tab

- **SSN:** The SSN field is located "behind" a button in order to keep it as confidential as possible. When the customer provides their SSN it must be entered. Having an SSN in OSOS is very important because customer SSNs are used to match against wages and determine if the customer is employed. Entering a customer's SSN also helps prevent duplicate records.



- **Ethnic Heritage & Race:** Select the **Ethnic Heritage & Race** button. If the customer provides Ethnic Heritage and/or Race information, select the most appropriate choice. If no information is provided, select **Not Disclosed**. This information is also located "behind" the button in order to keep it as confidential as possible.

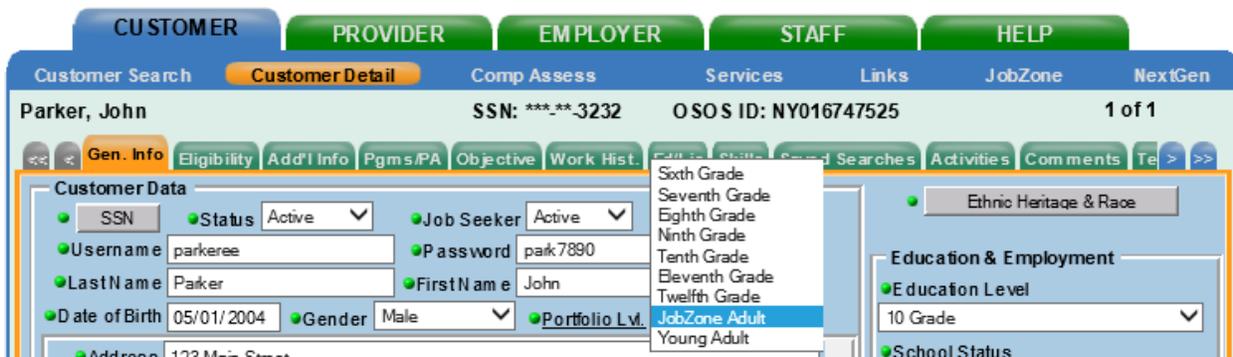


The screenshot shows a software interface with a navigation bar at the top containing buttons for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. A dialog box titled "Ethnic Heritage and Race -- Webpage Dialog" is open, displaying the following options:

- Ethnic Heritage**
  - Hispanic or Latino
  - Not Hispanic or Latino
  - Not Disclosed
- Race**
  - Alaskan or American Indian
  - Asian
  - Black or African American
  - Hawaiian or Pacific Islander
  - White
  - Not Disclosed

At the bottom of the dialog box are "Ok" and "Cancel" buttons. In the background, a form titled "Ethnic Heritage & Race" is visible, showing a dropdown menu for "Education Level" set to "10 Grade", "School Status" set to "In-school, Secondary School or Less", and "Employment Status" set to "Not Employed". Other sections include "Contact Preferences" with checkboxes for "Use Postal", "Fax", "Pri. Phone", "Em ail", and "Alt. Phone".

- **Portfolio Level** - A new record will default to **JobZone Adult**. You may keep this designation and therefore create the JobZone account along with the new OSOS record. Or, if the youth is younger than 18, you can choose the highest level of education completed (ex: **Tenth Grade**) in order to create a CareerZone account along with the new OSOS record.
- **Username and Password** - While this is a required field, any record with **Portfolio Lvl** set to **JobZone** will not use these fields for JobZone access. All **Portfolio Lvl**s other than **JobZone Adult** will use these fields as login credentials for CareerZone. Any unique username and any password may be entered in these fields, as long as they are at least 6 characters in length.



The screenshot shows the OSOS Customer Detail form for John Parker. The form includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The Customer Detail tab is active, showing fields for SSN, Username, Last Name, Date of Birth, Gender, Status, Job Seeker, Password, First Name, and Portfolio Lvl. A dropdown menu for Portfolio Lvl is open, showing options: Sixth Grade, Seventh Grade, Eighth Grade, Ninth Grade, Tenth Grade, Eleventh Grade, Twelfth Grade, JobZone Adult (selected), and Young Adult. The Education Level field is set to 10 Grade.



*Note: If you are creating a new customer record, the Portfolio Level selected should reflect the highest grade level that the youth has completed. If an OSOS record already exists for the youth, **do not change the Portfolio Level in OSOS.***

### Additional Info Tab

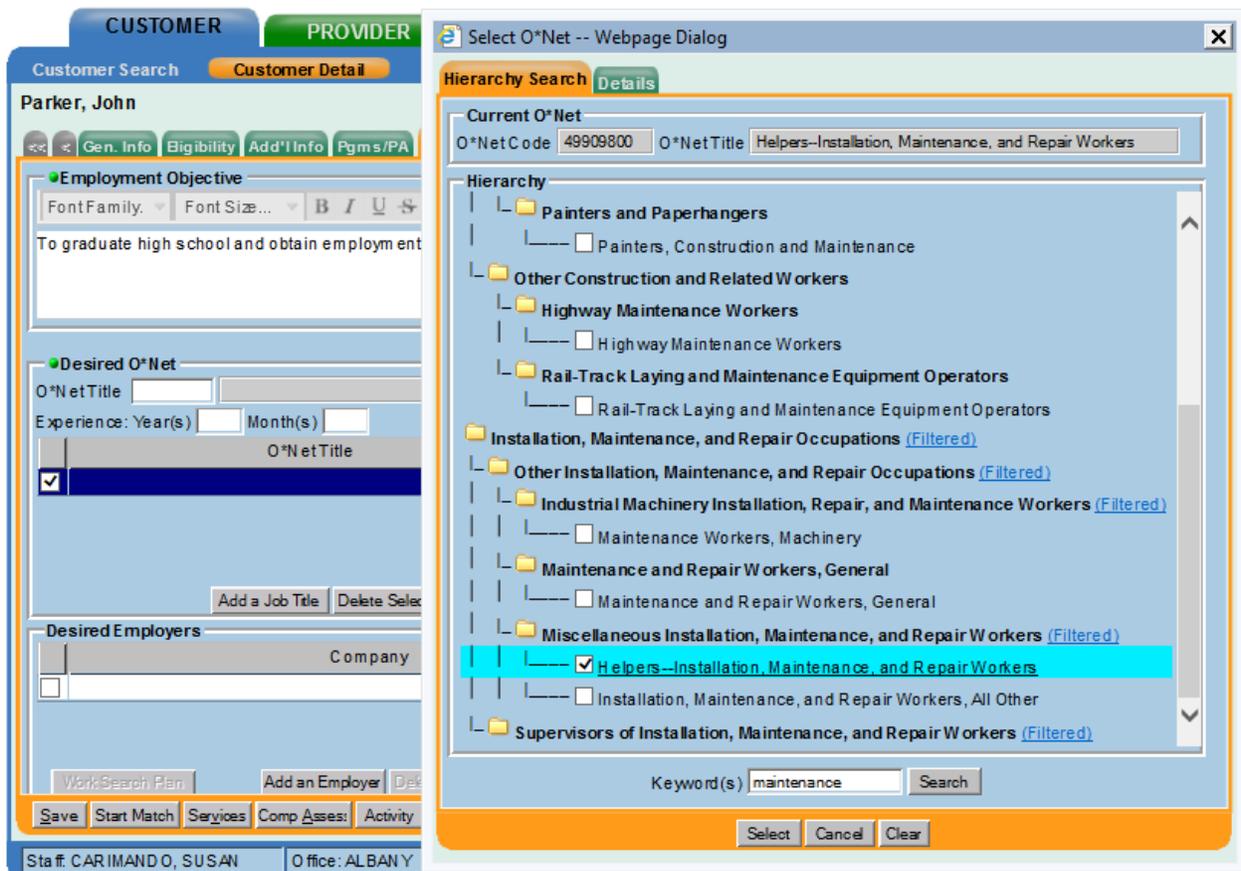
**Veteran Status** is the only required field on this tab. Additional information entered on this tab can be used to match customers to relevant job postings.

### Programs / PA Tab

- This tab does not contain any required information. If the participant is receiving public assistance use the check box next to the title, and then fill in the **Reg Date**. If the customer is unsure of when they began receiving public assistance, ask them for their best approximation.

### Objective Tab

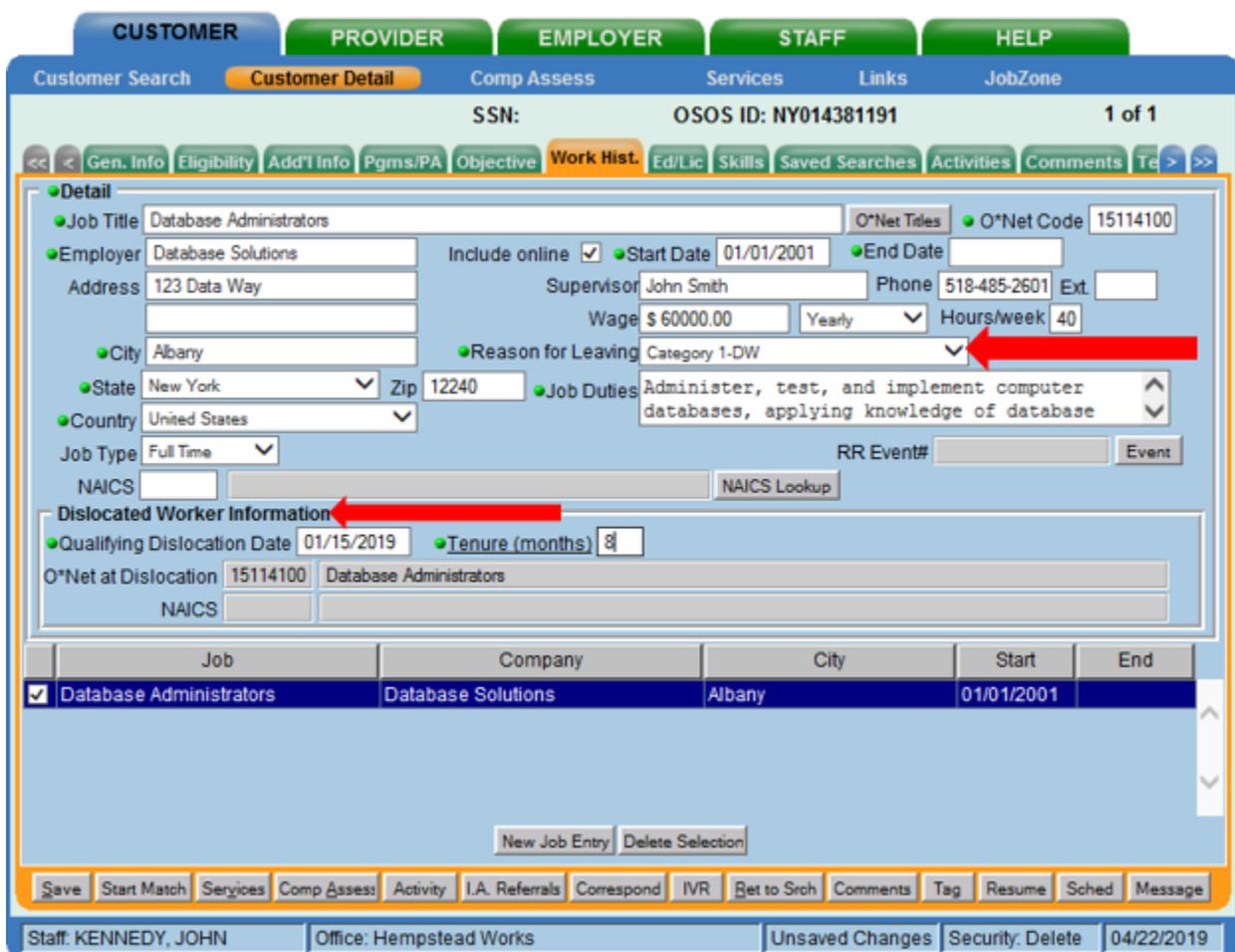
- Desired O\*Net:** At least one **O\*Net title** is required. Click the **Add a Job Title** button. Then, click the **O\*Net Titles** button. This opens the Select O\*Net Webpage Dialogue box. Use the Keyword search at the bottom or the O\*Net folder hierarchy to find the job title most closely related to the employment the participant is seeking. Check the box next to the job title. Then click **Select**.



## Work History Tab

Many participants served under this grant were placed in temporary employment after they lost their prior job as a result of the COVID-19 pandemic. These participants must be documented in OSOS as dislocated workers.

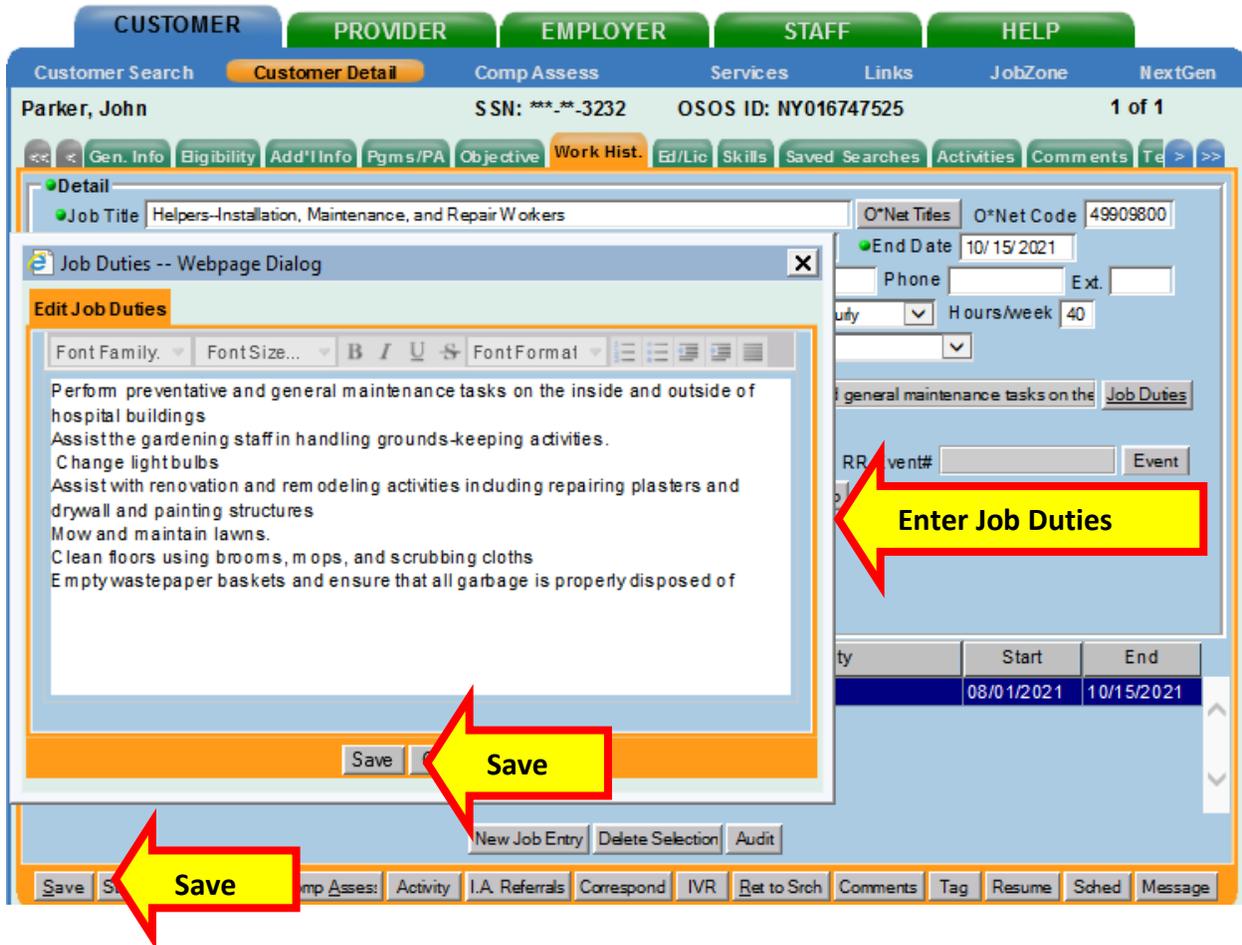
To properly document a dislocated worker, the **Work History** tab must be completed. The customer's most recent job prior to the participation in the grant must be recorded. For this job entry, select **Category 1 DW** in the **Reason for Leaving** field. Category 1 Dislocated Workers must have a **Dislocation Date** and **Tenure**. All other required fields must also be filled out.



The screenshot displays the OSOS interface for a customer's work history. The 'Work Hist.' tab is active, showing details for a job at Database Solutions. The 'Reason for Leaving' dropdown is set to 'Category 1-DW'. The 'Dislocated Worker Information' section is expanded, showing a 'Qualifying Dislocation Date' of 01/15/2019 and a 'Tenure (months)' of 8. A table below lists the job entry with columns for Job, Company, City, Start, and End.

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Database Administrators	Database Solutions	Albany	01/01/2001	

Click the **Job Duties** button to open up a new webpage dialog box. Enter the job duties in the freeform text box and click **Save**.



The screenshot shows the OSOS web application interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are navigation tabs: Customer Search, Customer Detail (selected), Comp Assess, Services, Links, JobZone, and NextGen. The main content area shows details for Parker, John, with SSN: \*\*\*-\*\*-3232 and OSOS ID: NY016747525. A 'Job Duties -- Webpage Dialog' window is open, displaying a text area with the following job duties:

- Perform preventative and general maintenance tasks on the inside and outside of hospital buildings
- Assist the gardening staff in handling grounds-keeping activities.
- Change light bulbs
- Assist with renovation and remodeling activities including repairing plasters and drywall and painting structures
- Mow and maintain lawns.
- Clean floors using brooms, mops, and scrubbing cloths
- Empty wastepaper baskets and ensure that all garbage is properly disposed of

At the bottom of the dialog box is a 'Save' button. In the main application window, there is another 'Save' button at the bottom left. A yellow arrow points to this 'Save' button. Another yellow arrow points to the 'Job Duties' button in the main application window. A third yellow arrow points to the 'Job Duties' button in the dialog box.

Staff must also enter the grant-funded employment as a new job entry in OSOS.

### Ed/Lic Tab

- There are three required sections within this tab; **Certificates/Licenses**, **Schools**, and **Professional Associations**. If the customer does not have information to enter in these sections, select **No Information Provided** under each section.

### Skills Tab

- **Additional Skills Text:** Enter any additional skills and abilities that are important to the customer's job performance.



*Once the **Skills** tab is completed, and the entire basic customer record has been entered, click the **Save** button at the bottom of the screen. **Record Saved** will briefly be displayed in the upper right-hand corner when the record is successfully saved. If there are fields missing information, an **Error Message** pop up box will indicate the error.*

### CASE NOTES

It is important to document case notes in the customer record. It is best practice to record case notes every time staff work with the customer. Case notes are documented in the **Customer** module, **Customer Detail** window, **Comments** tab.



Case notes should include details of the appointment that are not recorded anywhere else in OSOS. They should be clear, factual, relevant to employment, and show a logical progression. Case notes allow staff to gain a more complete understanding of the customer's situation.



## COMPREHENSIVE ASSESSMENT

Information documented in the Comprehensive Assessment window is important for recording the customer's barriers and challenges. For detailed instructions on completing the Comprehensive Assessment, please see the [Comprehensive Assessment & Supplemental Data Guide](#).

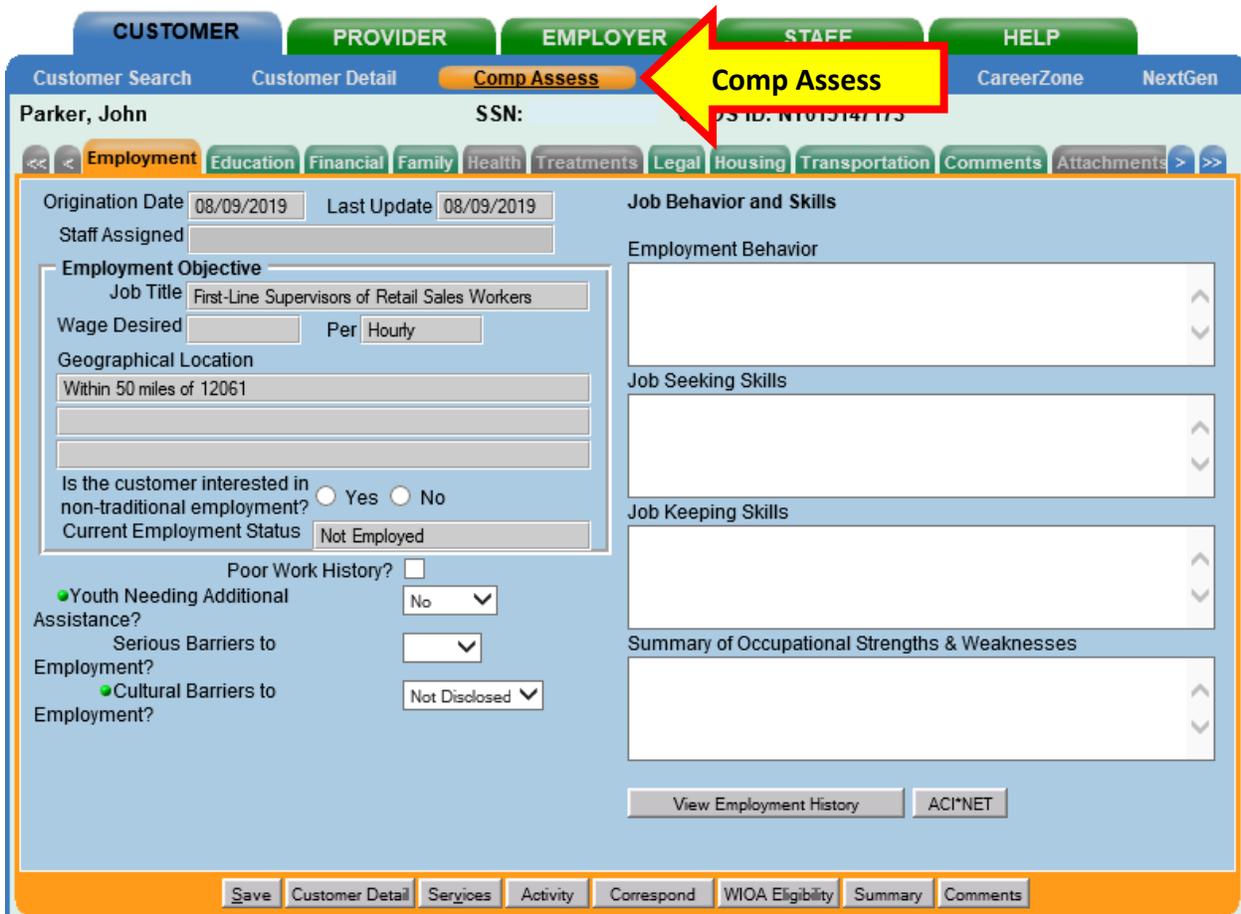
Many of the fields in Comp Assess are used to determine eligibility under WIOA programs. Participants in the COVID-19 DW grant do not need to be co-enrolled in the WIOA programs. Participants served solely under this grant will not be included in local WIOA performance measures. For the purposes of this grant, providers should only enter information that is known. If the information is unknown, please select **No** or **Not Disclosed**.

In order to provide additional services to participants, Local Areas may choose to co-enroll in a WIOA program. If a customer is being enrolled in both the COVID-19 DW grant and a WIOA program, then information required under WIOA must be entered in OSOS. Once a customer is co-enrolled, all WIOA eligibility, data entry, and reporting requirements must be followed. Co-enrolled customers will be included in Local Area performance measures.

The **Comp Assess** window is located in the **Customer** module.



*When information is entered into the Comprehensive Assessment section, all required data fields (as indicated by a green dot) must be completed in order to save the record.*



The screenshot displays the 'Comp Assess' window for a customer named Parker, John. The interface includes a top navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with options like Customer Search, Customer Detail, and Comp Assess. The main content area is divided into several sections:

- Customer Information:** Parker, John; SSN: [redacted]; [redacted]
- Employment Objective:**
  - Job Title: First-Line Supervisors of Retail Sales Workers
  - Wage Desired: [redacted] Per Hourly
  - Geographical Location: Within 50 miles of 12061
  - Is the customer interested in non-traditional employment?  Yes  No
  - Current Employment Status: Not Employed
  - Poor Work History?
  - Youth Needing Additional Assistance?  No
  - Serious Barriers to Employment?
  - Cultural Barriers to Employment?  Not Disclosed
- Job Behavior and Skills:**
  - Employment Behavior: [redacted]
  - Job Seeking Skills: [redacted]
  - Job Keeping Skills: [redacted]
  - Summary of Occupational Strengths & Weaknesses: [redacted]

Buttons at the bottom include Save, Customer Detail, Services, Activity, Correspond, WIOA Eligibility, Summary, and Comments. A yellow arrow points to the 'Comp Assess' tab in the sub-navigation bar.



Below are some noteworthy points for filling out the tabs located within the **Comprehensive Assessment** window for participants only enrolled under the COVID-19 DW grant. However, as a best practice, staff should always enter as much information as known about the customer to better serve them.

### Employment Tab

- **Youth Needing Additional Assistance:** Local area determines what youth will fall into this category. For the purposes of this initiative, staff may select **No**.
- **Cultural Barriers to Employment:** This information is collected as a requirement under WIOA and is not related to this initiative. Staff may select **Not Disclosed**.

### Education Tab

- **Basic Skills Deficient/Low Levels of Literacy:** Providers do not need to determine basic skills deficiency. Only enter this information if it is known. If unknown, select **No**.
- **English Language Learner:** An English Language Learner will have limited ability in speaking, reading, writing or understanding English. They may also meet one of the following two conditions:
  - Their native language is a language other than English; or
  - They live in a family or community where a language other than English is the main language.

**Financial Tab** - Do not enter any information into this tab.

### Family Tab

- **Marital Status** - Select the option that most closely reflects the customer's marital status. Or, select **Not Disclosed**.
- **Family Status** - Select the option that most closely reflects the customer's family status. In most cases, such as a non-parenting youth, the customer is considered an **Other Family Member**. Or, select **Not Disclosed**.
- **Is Customer parenting youth?** - Female youth customers are considered parenting once pregnant. Alternatively, male youth customers are only considered parenting once their child is born.



*Female customers will have the additional required field **Is customer pregnant?** If **Yes** is selected, staff must enter a **Delivery Date**.*



**Health** tab and **Treatment** tabs are both greyed out and not accessible. They require no action.

**Legal Tab** - There is no required information located in this tab. However, if the customer discloses that they are an ex-offender, staff should select **Yes**. If the customer identifies as an ex-offender, record relevant comments in the **Customer Detail** window, **Comments** tab. Information recorded would include when the conviction occurred, and whether the customer has work restrictions. Comments must be specific to job search restrictions and work search restrictions only.

#### **Housing Tab**

- **Current Housing** - Select the option that most closely reflects the customer's current housing status. Many youth will not own or rent their own home, so this information should be based on their care taker. For instance, if the youth lives in a home owned by their parent(s), select **Own**. Or, select **Not Disclosed**.

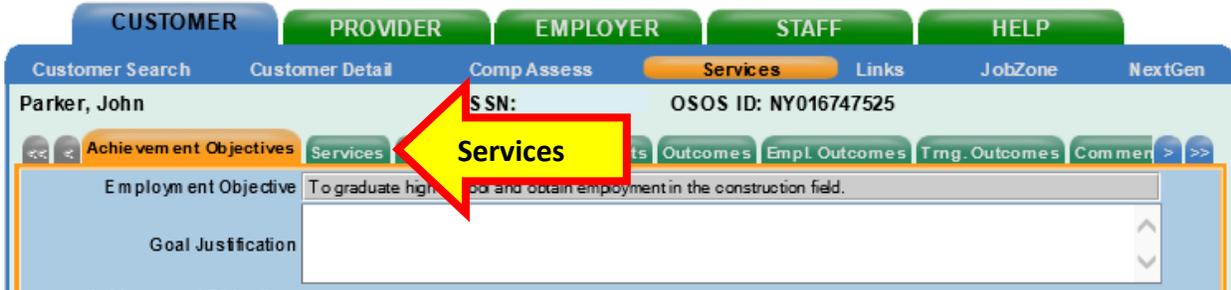
**Comments Tab** - Do not use the **Comments** tab located within the **Comp Assess** window. Any **Comments** must be recorded in the **Customer Detail** window, **Comments** tab.

## SERVICES

Once you have created/updated the customer's record and documented DW status, proceed to the Services Window, Services tab to enter services that are being provided to the customer.

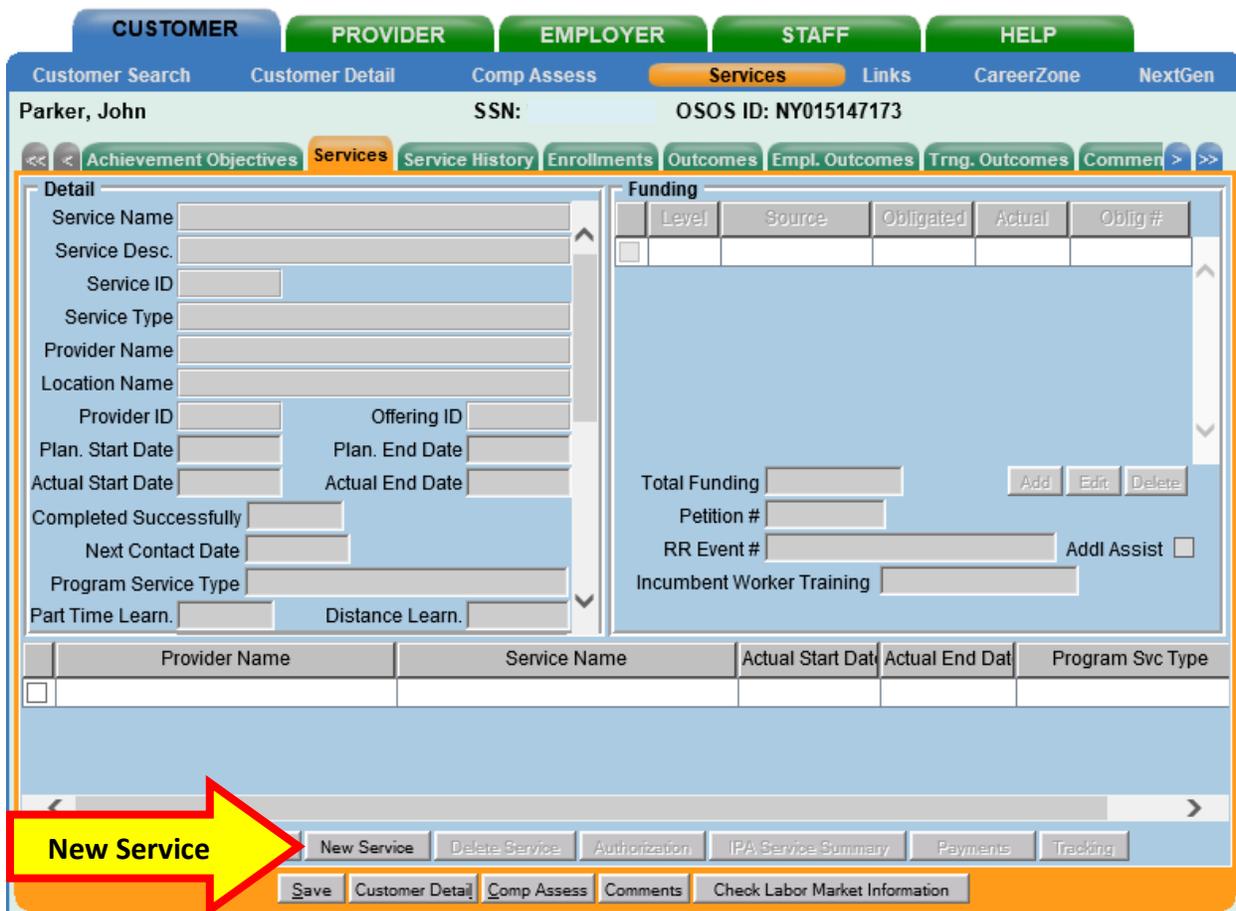
Entering the Service:

To record a service, first select the **Services** tab.



The screenshot shows the OSOS interface with the 'CUSTOMER' tab selected. The 'Services' tab is highlighted in the navigation bar. The customer name is 'Parker, John' and the OSOS ID is 'NY016747525'. The 'Services' tab is selected, and the 'Goal Justification' field is visible.

Select the **New Service** button.

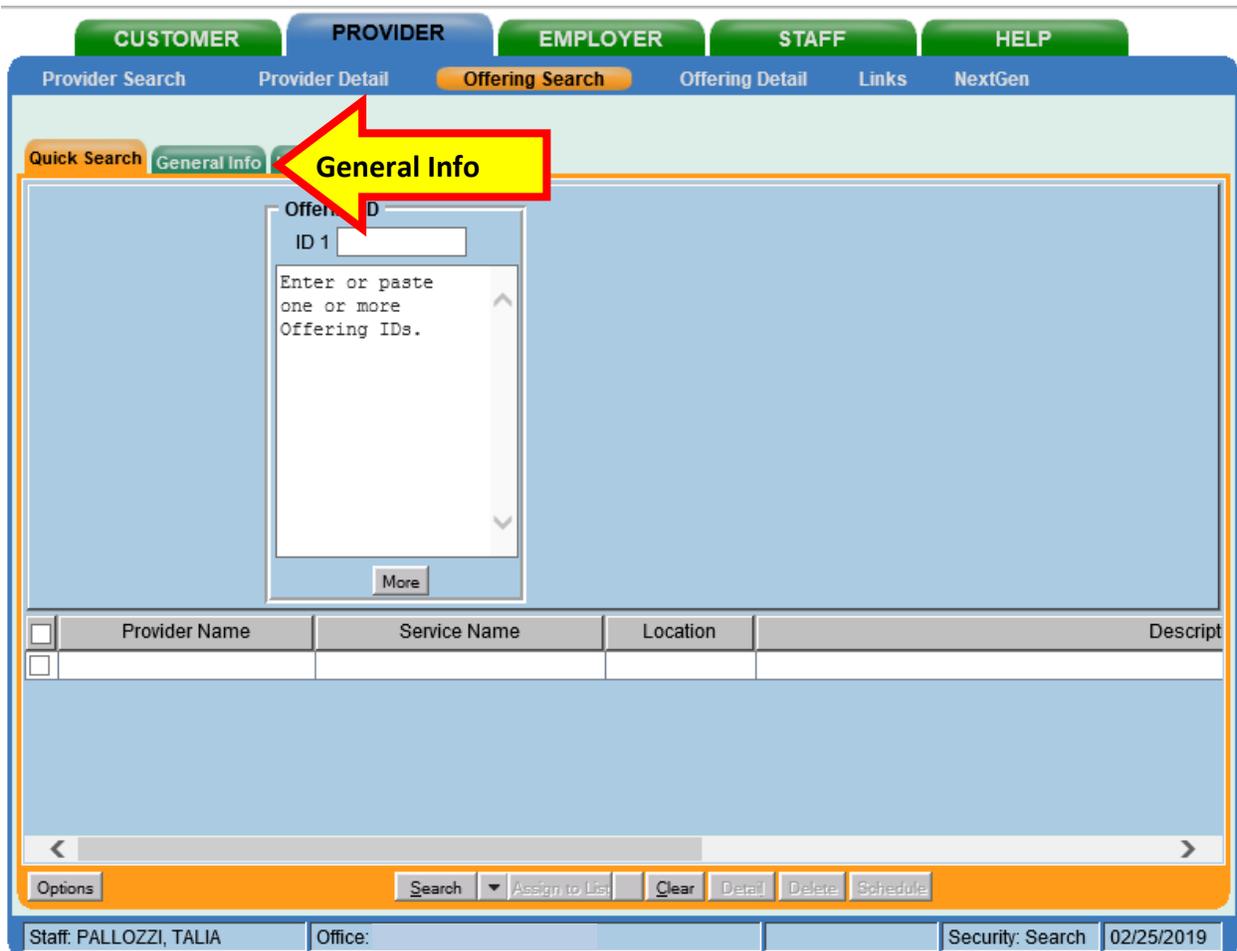


The screenshot shows the OSOS interface with the 'Services' tab selected. The 'New Service' button is highlighted in a red arrow. The interface displays various fields for service details and funding information.

Level	Source	Obligated	Actual	Oblig #

Buttons: New Service, Delete Service, Authorization, IPA Service Summary, Payments, Tracking, Save, Customer Detail, Comp Assess, Comments, Check Labor Market Information

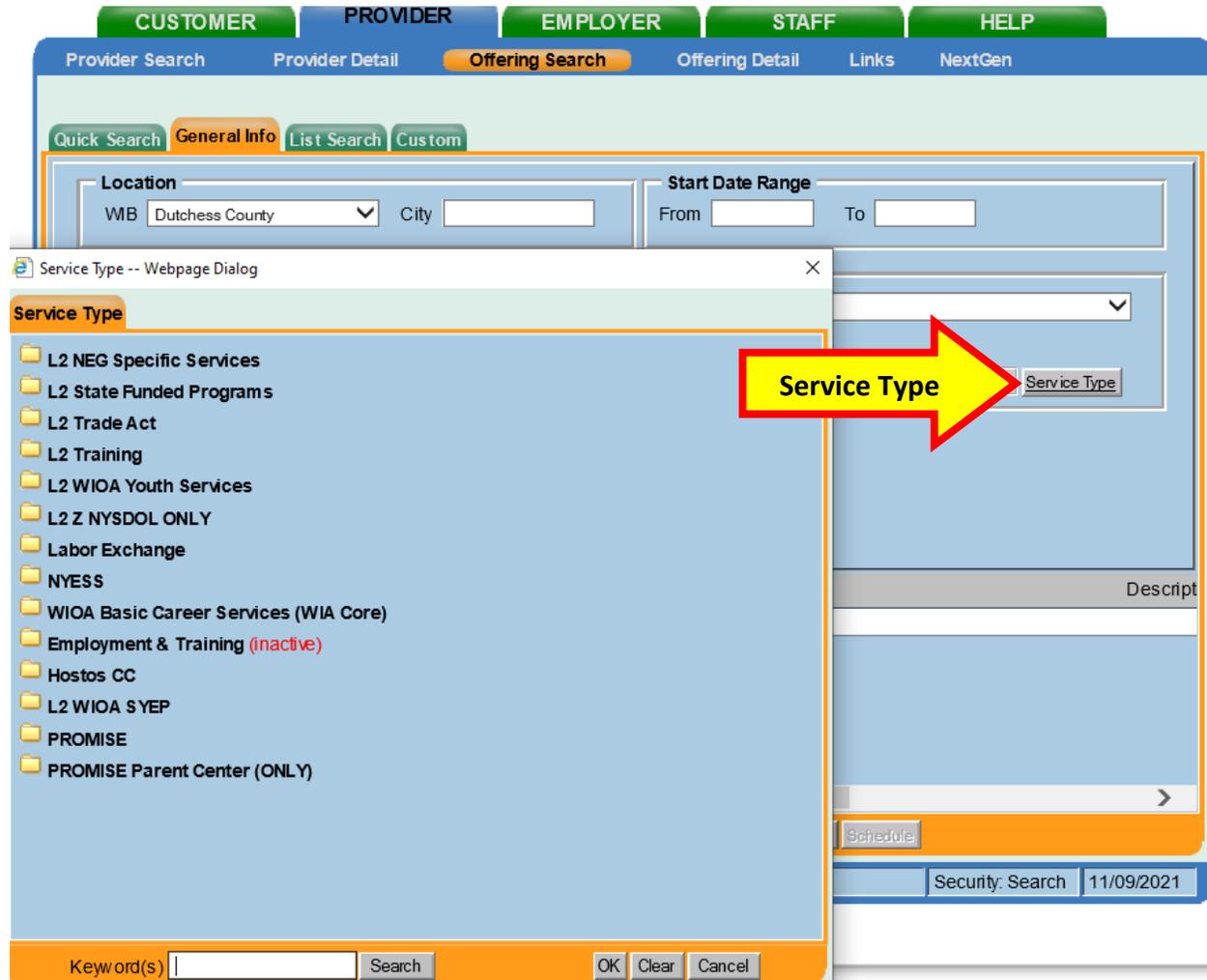
This navigates to the **Provider** module, **Offering Search** window, **Quick Search** tab. Select the **General Info** tab.



The screenshot displays the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (selected), Offering Detail, Links, and NextGen. The main content area has two sub-tabs: Quick Search and General Info (selected). A yellow arrow points to the General Info tab. The General Info section contains a form with a text input field labeled "Offering ID" and a "More" button. Below the form is a table with columns: Provider Name, Service Name, Location, and Description. The table is currently empty. At the bottom of the window, there is a status bar with fields for Staff (PALLOZZI, TALIA), Office, Security (Search), and a date (02/25/2019). A toolbar at the bottom contains buttons for Options, Search, Assign to List, Clear, Detail, Delete, and Schedule.

Verify the correct **WIB** is selected

Click the **Service Type** button to bring up a new webpage dialog box.

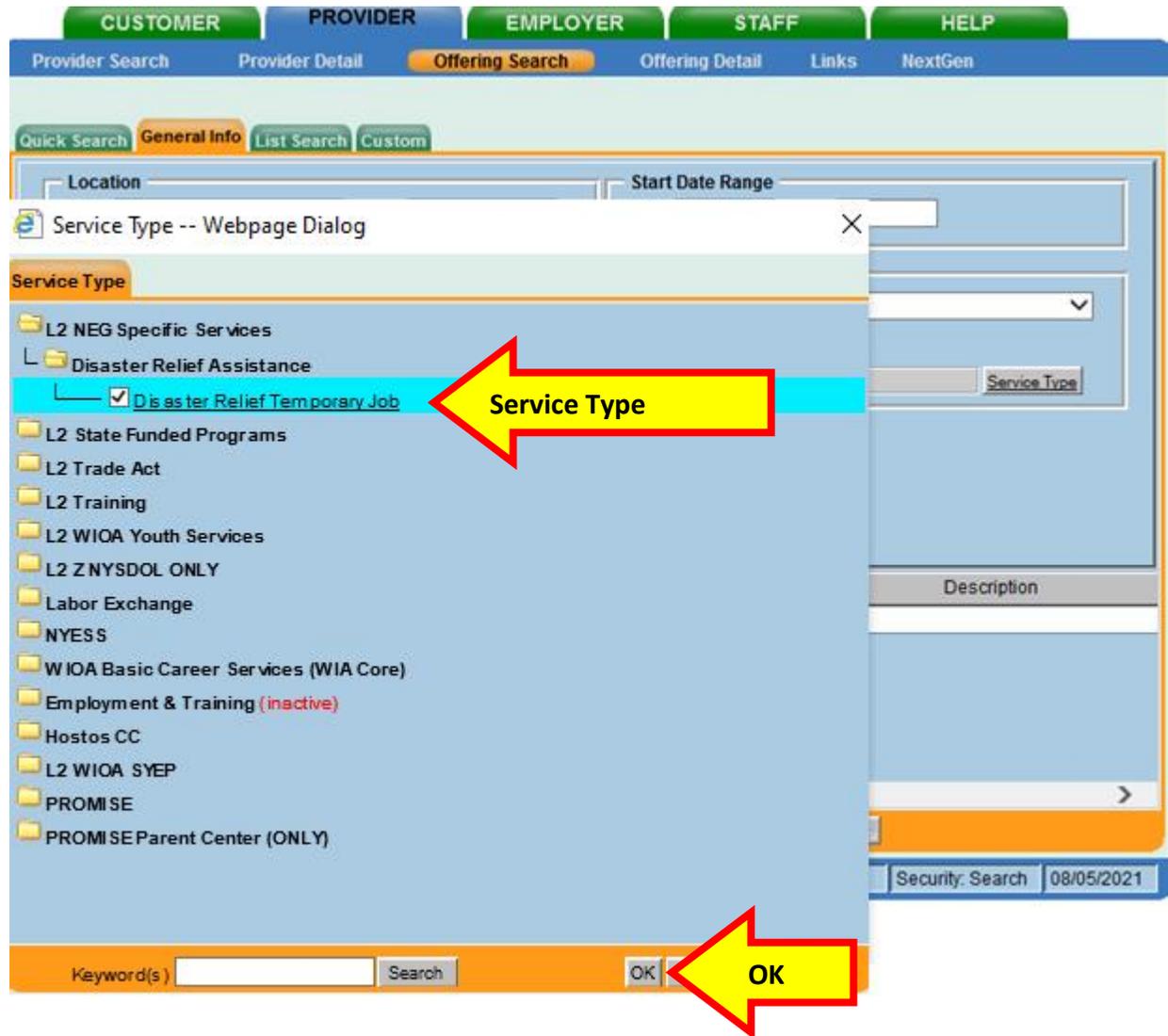


The screenshot displays the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (highlighted), Offering Detail, Links, and NextGen. The main content area includes a 'Quick Search' section with 'General Info', 'List Search', and 'Custom' options. A search form contains a 'Location' field with a dropdown menu set to 'Dutchess County' and a 'City' input field, and a 'Start Date Range' field with 'From' and 'To' inputs. A 'Service Type -- Webpage Dialog' box is open in the foreground, showing a list of service categories under the heading 'Service Type':

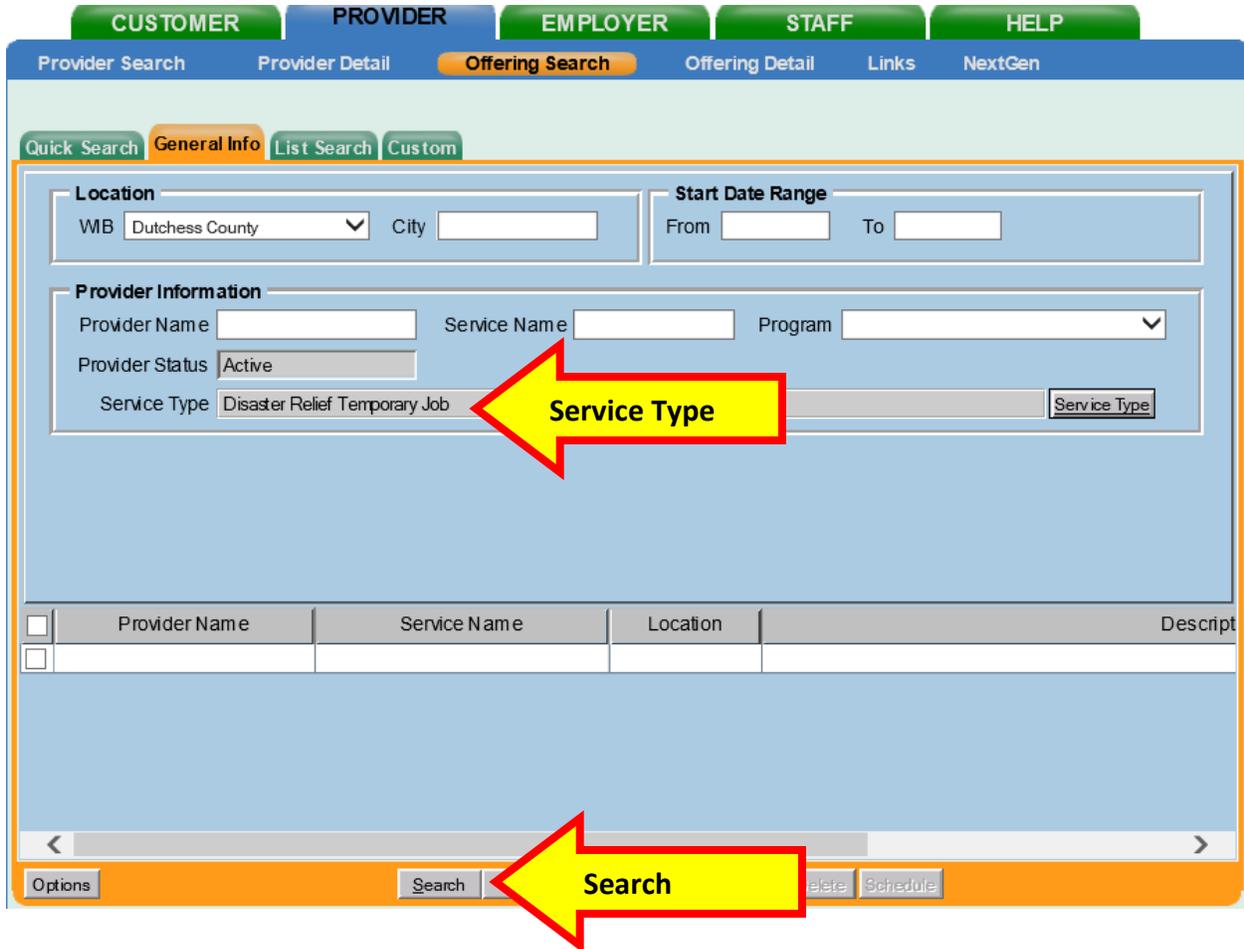
- L2 NEG Specific Services
- L2 State Funded Programs
- L2 Trade Act
- L2 Training
- L2 WIOA Youth Services
- L2 Z NYSDOL ONLY
- Labor Exchange
- NYESS
- WIOA Basic Career Services (WIA Core)
- Employment & Training (inactive)
- Hostos CC
- L2 WIOA SYEP
- PROMISE
- PROMISE Parent Center (ONLY)

A yellow arrow with the text 'Service Type' points to a button labeled 'Service Type' in the background dialog box. At the bottom of the background dialog, there is a 'Schedule' button. The bottom of the screenshot shows a footer with 'Keyword(s) Search' and 'OK Clear Cancel' buttons, and a status bar with 'Security: Search' and '11/09/2021'.

Select the **Disaster Relief Temporary Job** service from the L2 NEG Specific Services folder.  
Click **OK**.



Once the **Service Type** is chosen, click **Search**.



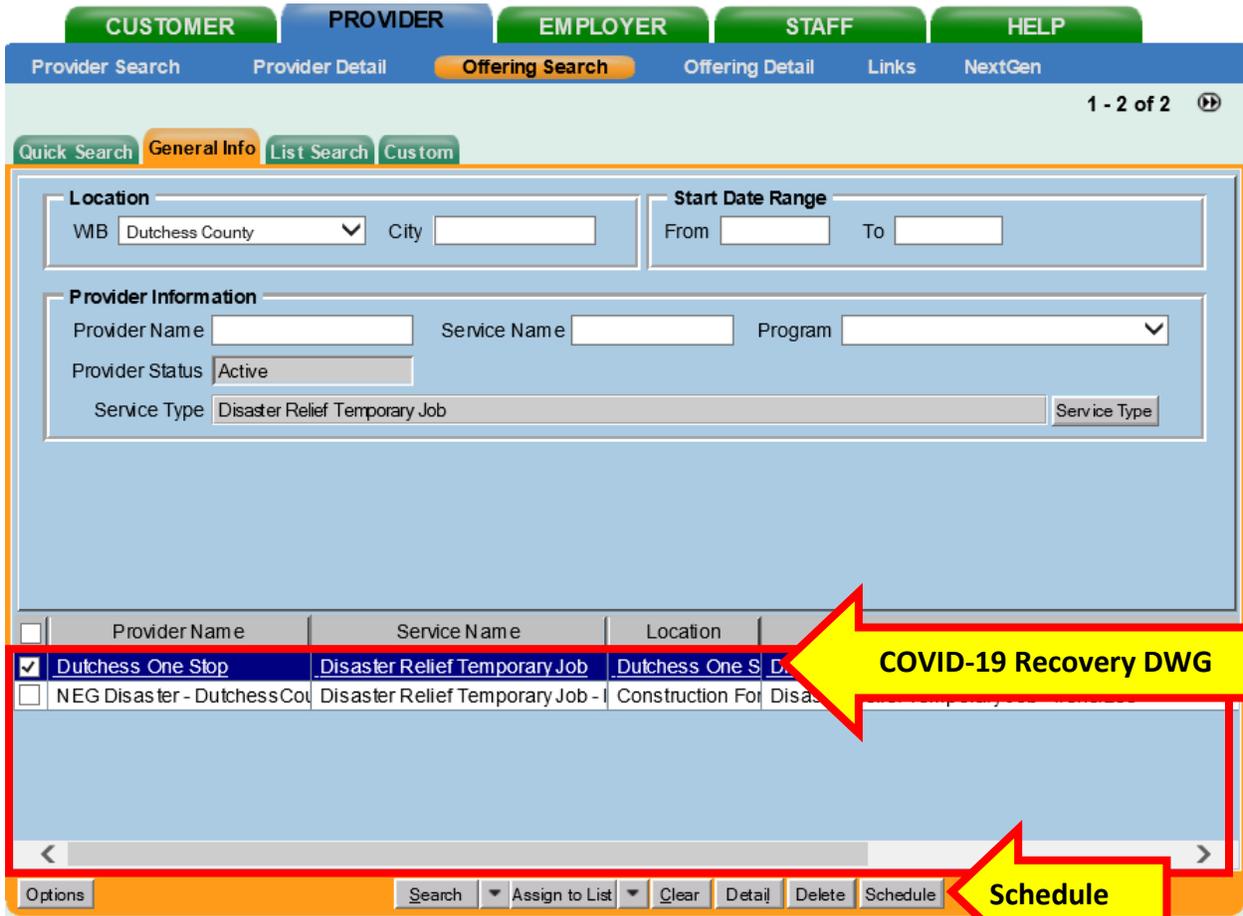
The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (highlighted), Offering Detail, Links, and NextGen. Underneath are further sub-tabs: Quick Search, General Info (highlighted), List Search, and Custom. The main form area is titled 'Offering Search' and contains several input fields:

- Location:** A dropdown menu showing 'WB Dutchess County' and a 'City' text input field.
- Start Date Range:** 'From' and 'To' text input fields.
- Provider Information:** 'Provider Name' text input, 'Service Name' text input, and 'Program' dropdown menu.
- Provider Status:** A dropdown menu showing 'Active'.
- Service Type:** A dropdown menu showing 'Disaster Relief Temporary Job'. A yellow arrow points to this field with the text 'Service Type'.

Below the form is a table with columns: Provider Name, Service Name, Location, and Descript. The table is currently empty. At the bottom of the page, there are buttons for 'Options', 'Search', 'Delete', and 'Schedule'. A yellow arrow points to the 'Search' button with the text 'Search'.

The search results will be presented at the bottom of the screen.

Select the **Disaster Relief Temporary Job** service associated with your agency and click **Schedule**.



CUSTOMER PROVIDER EMPLOYER STAFF HELP  
 Provider Search Provider Detail **Offering Search** Offering Detail Links NextGen  
 1 - 2 of 2  
 Quick Search **General Info** List Search Custom

**Location**  
 WB  City   
**Start Date Range**  
 From  To

**Provider Information**  
 Provider Name  Service Name  Program   
 Provider Status   
 Service Type

<input type="checkbox"/>	Provider Name	Service Name	Location
<input checked="" type="checkbox"/>	Dutchess One Stop	Disaster Relief Temporary Job	Dutchess One S D
<input type="checkbox"/>	NEG Disaster - DutchessCol	Disaster Relief Temporary Job - I	Construction For Disa



This brings you to the **Customer** module, **Services** window, **Services** tab. Select the Service using the check box in the far-left column.

Enter the following fields in the Detail section: **Plan Start Date, Plan End Date, and Actual Start Date**. If the employment has ended, enter the end date in the **Actual End Date** field. If the employment is ongoing, do not enter an **Actual End Date** until the employment has ended. Instructions for closing a service are provided later in this guide. As a best practice, enter a **Next Contact Date** to follow-up. A reminder will show up in your Staff Inbox when it's time to review the Service.

**Customer** | PROVIDER | EMPLOYER | STAFF | HELP

Customer Search | Customer Detail | Comp Assess | **Services** | Links | JobZone | NextGen

SSN: | OSOS ID: NY014381191

Achievement Objectives | **Services** | Service History | Enrollments | Outcomes | Empl. Outcomes | Trng. Outcomes | Comment

**Detail**

Service Name: Disaster Relief Temporary Job  
 Service Desc: Disaster Relief Temporary Job  
 Service ID: 143646  
 Service Type: Disaster Relief Temporary Job  
 Provider Name: Dutchess One Stop  
 Location Name: Dutchess One Stop  
 Provider ID: 76598 | Offering ID: 144188

Plan Start Date: 08/02/2021 | Plan End Date: 02/04/2022  
 Actual Start Date: 08/02/2021 | Actual End Date:   
 Completed Successfully:   
 Next Contact Date: 11/15/2021  
 Program Service Type: Individualized Career Services  
 Part Time Learn. | Distance Learn.

**Funding**

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>				

Total Funding:   
 Petition #:   
 RR Event #:   
 Incumbent Worker Training:   
 Add | Edit | Delete

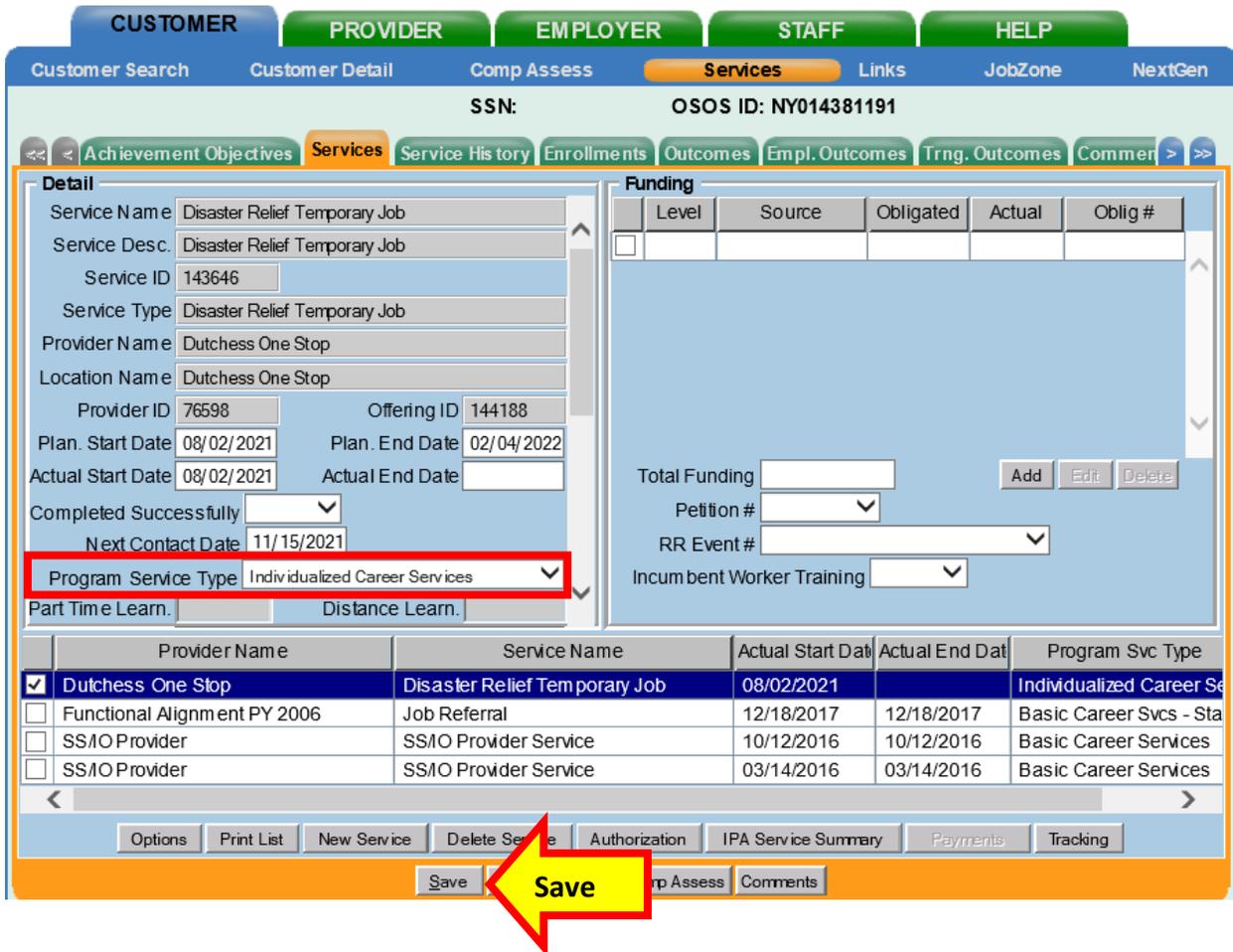
	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/>	Dutchess One Stop	Disaster Relief Temporary Job	08/02/2021		Individualized Career Services
<input type="checkbox"/>	Functional Alignment PY 2006	Job Referral	12/18/2017	12/18/2017	Basic Career Svcs - Sta
<input type="checkbox"/>	SS/IO Provider	SS/IO Provider Service	10/12/2016	10/12/2016	Basic Career Services
<input type="checkbox"/>	SS/IO Provider	SS/IO Provider Service	03/14/2016	03/14/2016	Basic Career Services

Options | Print List | New Service | Delete Service | Authorization | IPA Service Summary | Payments | Tracking

Save | Customer Detail | Comp Assess | Comments

In the **Program Service Type** field, select **Individualized Career Services**.

Click the **Save** button.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services (highlighted), Links, JobZone, and NextGen. The main header displays SSN: and OSOS ID: NY014381191. A secondary set of tabs includes Achievement Objectives, Services (highlighted), Service History, Enrollments, Outcomes, Empl. Outcomes, Trng. Outcomes, and Comments. The main content area is divided into two sections: Detail and Funding. The Detail section contains various fields for service information, with the 'Program Service Type' dropdown menu highlighted in red and set to 'Individualized Career Services'. The Funding section includes a table with columns for Level, Source, Obligated, Actual, and Oblig #, along with input fields for Total Funding, Petition #, RR Event #, and Incumbent Worker Training. Below the Detail and Funding sections is a table listing services provided by different providers. The 'Save' button at the bottom is highlighted with a red arrow.

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>				

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/> Dutchess One Stop	Disaster Relief Temporary Job	08/02/2021		Individualized Career Services
<input type="checkbox"/> Functional Alignment PY 2006	Job Referral	12/18/2017	12/18/2017	Basic Career Svcs - Sta
<input type="checkbox"/> SS/O Provider	SS/O Provider Service	10/12/2016	10/12/2016	Basic Career Services
<input type="checkbox"/> SS/O Provider	SS/O Provider Service	03/14/2016	03/14/2016	Basic Career Services



Next, you will attach the funding. Enter 1 into the **Total Funding** field. Then click the **Add** button.

**CUSTOMER** **PROVIDER** **EMPLOYER** **STAFF** **HELP**

Customer Search Customer Detail Comp Assess **Services** Links JobZone NextGen

SSN: OSOS ID: NY014381191

Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcomes Comment > >>

**Detail**

Service Name: Disaster Relief Temporary Job  
 Service Desc: Disaster Relief Temporary Job  
 Service ID: 143646  
 Service Type: Disaster Relief Temporary Job  
 Provider Name: Dutchess One Stop  
 Location Name: Dutchess One Stop  
 Provider ID: 76598 Offering ID: 144188  
 Plan. Start Date: 08/02/2021 Plan. End Date: 02/04/2022  
 Actual Start Date: 08/02/2021 Actual End Date:  
 Completed Successfully:   
 Next Contact Date: 11/15/2021  
 Program Service Type: Individualized Career Services  
 Part Time Learn.:  Distance Learn.:

**Funding**

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>				

Total Funding: \$ 1.00  **Add**

Petition #:   
 RR Event #:   
 Incumbent Worker Training:

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/>	Dutchess One Stop	Disaster Relief Temporary Job	08/02/2021		Individualized Career Services
<input type="checkbox"/>	Functional Alignment PY 2006	Job Referral	12/18/2017	12/18/2017	Basic Career Svcs - Sta
<input type="checkbox"/>	SS/O Provider	SS/O Provider Service	10/12/2016	10/12/2016	Basic Career Services
<input type="checkbox"/>	SS/O Provider	SS/O Provider Service	03/14/2016	03/14/2016	Basic Career Services

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

Save Customer Detail Comp Assess Comments



The **Funding Webpage Dialog** box will open.

Select the **Disaster Recovery NDWG** funding.

Enter 1 in the **Obligated Amount** field. This will automatically populate the **Obligated Percentage** field with 100.

Click **OK**.

Funding -- Webpage Dialog

**Funding**

	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	WB	WIOA Adult Local	2019	\$ 99999.00	
<input type="checkbox"/>	WB	WIOA Adult Local	2021	\$ 100000.00	
<input type="checkbox"/>	WB	WIOA Dislocated Worker Local	2019	\$ 99996.00	
<input type="checkbox"/>	WB	WIOA Dislocated Worker Local	2021	\$ 100000.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2019	\$ 100000.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2021	\$ 100000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2019	\$ 100000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2021	\$ 100000.00	
<input type="checkbox"/>	WB	Adult Statewide 15%	2019	\$ 100000.00	
<input type="checkbox"/>	WB	Adult Statewide 15%	2021	\$ 100000.00	
<input type="checkbox"/>	WB	Employment Recovery - NDWG	2020	\$ 100000.00	DW35478
<input type="checkbox"/>	WB	Gun Violence Prevention Local Initiative	2020	\$ 100000.00	
<input checked="" type="checkbox"/>	WB	Disaster Recovery NDWG	2020	\$ 100000.00	4651

**Add**

Obligated Amount \$ 1  ×

OR

Obligated Percentage

WB

Office

Region

**OK**

The appropriate funding has now populated the **Funding** section.

Click **Save** at the bottom of the screen.

**CUSTOMER**   **PROVIDER**   **EMPLOYER**   **STAFF**   **HELP**

Customer Search   Customer Detail   Comp Assess   **Services**   Links   JobZone   NextGen

SSN:   OSOS ID: NY014381191

Achievement Objectives   **Services**   Service History   Enrollments   Outcomes   Empl. Outcomes   Trng. Outcomes   Commer >>

**Detail**

Provider Name: Dutchess One Stop  
 Location Name: Dutchess One Stop  
 Provider ID: 76598   Offering ID: 144188  
 Plan. Start Date: 08/02/2021   Plan. End Date: 02/04/2022  
 Actual Start Date: 08/02/2021   Actual End Date:   
 Completed Successfully:    
 Next Contact Date: 11/15/2021  
 Program Service Type: Individualized Career Services  
 Part Time Learn.:    Distance Learn.:   
 Program:   
 Minimum Hours:   Number of Weeks:   
 O\*Net:   O\*Net:   
 NAICS:   NAICS:

**Funding**

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WIB	Disaster Recover	\$ 1.00	\$ 0.00

Total Funding: \$ 1.00   Add   Edit   Delete  
 Petition #:   
 RR Event #:   
 Incumbent Worker Training:   
 Add   Edit   Delete

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type	
<input checked="" type="checkbox"/>	Dutchess One Stop	Disaster Relief Temporary Job	08/02/2021	Individualized Career Se	
<input type="checkbox"/>	Functional Alignment PY 2006	Job Referral	12/18/2017	12/18/2017	Basic Career Svcs - Sta
<input type="checkbox"/>	SSAIO Provider	SSAIO Provider Service	10/12/2016	10/12/2016	Basic Career Services
<input type="checkbox"/>	SSAIO Provider	SSAIO Provider Service	03/14/2016	03/14/2016	Basic Career Services

Options   Print List   **Save**   New Service   Delete Service   Authorization   IPA Service Summary   Payments   Tracking

**Save**   Customer Detail   Comp Assess   Comments



## CLOSING A SERVICE

It is important that an **Actual End Date** is added to a service when the grant funded employment has ended. This is called closing the service. Funded services, other than Follow-Up Services, that remain open will prevent a customer from exiting their enrollment.

To close an open service, navigate to the **Customer** module, **Services** window, **Services** tab. Select the service that has ended and must be closed.

**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess **Services** Links JobZone NextGen

SSN: OSOS ID: NY014381191

Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcomes Comment

**Detail**

Provider Name: Dutchess One Stop  
 Location Name: Dutchess One Stop  
 Provider ID: 76598 Offering ID: 144188  
 Plan. Start Date: 08/02/2021 Plan. End Date: 02/04/2022  
 Actual Start Date: 08/02/2021 **Actual End Date: 02/04/2022**  
 Completed Successfully: Yes  
 Next Contact Date: 11/15/2021  
 Program Service Type: Individualized Career Services  
 Part Time Learn. Distance Learn.  
 Program  
 Minimum Hours Number of Weeks  
 O\*Net O\*Net  
 NAICS NAICS

**Funding**

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WIB Disaster Recover	\$ 1.00	\$ 0.00	

Total Funding \$ 1.00 Add Edit Delete  
 Petition #  
 RR Event #  
 Incumbent Worker Training

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/>	Dutchess One Stop	Disaster Relief Temporary Job	08/02/2021	02/04/2022	Individualized Career S
<input type="checkbox"/>	Functional Alignment PY 2006	Job Referral	12/18/2017	12/18/2017	Basic Career Svcs - Sta
<input type="checkbox"/>	SS/O Provider	SS/O Provider Service	10/12/2016	10/12/2016	Basic Career Services
<input type="checkbox"/>	SS/O Provider	SS/O Provider Service	03/14/2016	03/14/2016	Basic Career Services

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

Save Customer Detail Comp Assess Comments



Enter the **Actual End Date** and select **Completed Successfully** (yes/no).

Click **Save**. The service is now closed.

**CUSTOMER** **PROVIDER** **EMPLOYER** **STAFF** **HELP**

Customer Search Customer Detail Comp Assess **Services** Links JobZone NextGen

SSN: OSOS ID: NY014381191

Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcomes Commen >>

**Detail**

Provider Name: Dutchess One Stop  
Location Name: Dutchess One Stop  
Provider ID: 76598 Offering ID: 144188  
Plan. Start Date: 08/02/2021 Plan. End Date: 02/04/2022  
Actual Start Date: 08/02/2021 **Actual End Date: 02/04/2022**  
**Completed Successfully: Yes**  
Next Contact Date: 11/15/2021  
Program Service Type: Individualized Career Services  
Part Time Learn. Distance Learn.  
Program  
Minimum Hours Number of Weeks  
O\*Net NAICS

**Funding**

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WIB Disaster Recove	\$ 1.00	\$ 0.00	

Total Funding: \$ 1.00 Add Edit Delete  
Petition #  
RR Event #  
Incumbent Worker Training

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/> Dutchess One Stop	Disaster Relief Temporary Job	08/02/2021	02/04/2022	Individualized Career Se
<input type="checkbox"/> Functional Alignment PY 2006	Job Referral	12/18/2017	12/18/2017	Basic Career Svcs - Sta
<input type="checkbox"/> SS/O Provider	SS/O Provider Service	10/12/2016	10/12/2016	Basic Career Services
<input type="checkbox"/> SS/O Provider	SS/O Provider Service	03/14/2016	03/14/2016	Basic Career Services

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

Save **Save** Comp Assess Comments



## RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found [on the NYS Department of Labor's website](#).

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: [help.osos@labor.ny.gov](mailto:help.osos@labor.ny.gov)