

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Date of Birth (DOB)</b> 200 Customer Detail, DOB tab	Record the participant's date of birth. <u>If the UI DOB box is populated</u> , the DOB was verified by UI and no further action is needed. <u>If the Match Found box is populated</u> , the DOB was verified by DMV cross-match and no further action is needed. <u>For all others</u> , (1) record the DOB in the OSOS DOB field, (2) retain a copy of the verification document used, and (3) record a comment noting which type of verification document was used (see list of allowable verification sources).	WP	A	DW	Y	NDWG	TAA	Vet	<ul style="list-style-type: none"> <li>• Driver's license</li> <li>• Birth certificate</li> <li>• Baptismal record</li> <li>• DD-214</li> <li>• Report of transfer or discharge paper</li> <li>• Federal, state, local or tribal identification card</li> <li>• Passport</li> <li>• Hospital record of birth</li> <li>• Public Assistance/Social Services records</li> <li>• School records or school ID card</li> <li>• Work permit</li> <li>• Family bible</li> <li>• Cross-Match with State Agency Records (DMV for example)</li> <li>• Justice System Records</li> <li>• Selective Service Registration</li> <li>• Signed Letter from a parent or guardian</li> <li>• Medical Records</li> </ul>	<a href="#">OSOS Guide for Verifying Date of Birth in the DOB Tab</a>
<b>Individual with a Disability</b> 202 Customer Detail, Eligibility tab	Select "disabled" if the participant indicates that he/she has any "disability", as defined in Section 3(2)(a) of the Americans with Disabilities Act of 1990 (42 U.S.C. 12102). Under that definition, a "disability" is a physical or mental impairment that substantially limits one or more of the person's major life activities. Select "not disabled" if the participant indicates that he/she does not have a disability that meets the definition. Select "not disclosed" if the participant did not self-identify.	WP	A	DW	Y	NDWG	TAA	Vet	<ul style="list-style-type: none"> <li>• Self-attestation</li> <li>• Assessment test results</li> <li>• School 504 records provided by student</li> <li>• School Individualized Education Program (IEP) record</li> </ul>	<a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>

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<b>Eligible Veteran Status</b> 301 Customer Detail, Add'l Info tab	<p>Select "yes" if the participant is a person who served in the active U.S. military, naval, or air service for a period of less than or equal to 180 days, and who was discharged or released from such service under conditions other than dishonorable.</p> <p>Select "yes" if the participant served on active duty for a period of more than 180 days and was discharged or released with other than a dishonorable discharge; or was discharged or released because of a service connected disability; or as a member of a reserve component under an order to active duty pursuant to section 167(a), (d), or (g), 673 (a) of Title 10, U.S.C., served on active duty during a period of war or in a campaign or expedition for which a campaign badge is authorized and was discharged or released from such duty with other than a dishonorable discharge.</p> <p>Select "yes" if the participant is: (a) the spouse of any person who died on active duty or of a service connected disability, (b) the spouse of any member of the Armed Forces serving on active duty who at the time of application for assistance under this part, is listed, pursuant to 38 U.S.C 101 and the regulations issued there under, by the Secretary concerned, in one or more of the following categories and has been so listed for more than 90 days: (i) missing in action; (ii) captured in the line of duty by a hostile force; or (iii) forcibly detained or interned in the line of duty by a foreign government or power; or (c) the spouse of any person who has a total disability permanent in nature resulting from a service connected disability or the spouse of a veteran who died while a disability so evaluated was in existence.</p> <p>Select "no" if the participant does not meet any one of the conditions described above.</p> <p>Leave "blank" if the data is not available.</p>	WP*	A*	DW*		NDWG*	TAA	Vet	<p><b>* Source documentation beyond self-attestation for this element is only required at the point in which a decision is made to enroll a covered person over a non-covered person and commit financial resources, which does not include staff time. (Per TEGL 10-09, Section 9.)</b></p> <ul style="list-style-type: none"> <li>• DD-214</li> <li>• Letter from the Veterans' Administration</li> <li>• Cross-match with Dept of Defense records</li> <li>• Cross-match with Veterans' Svc Database</li> <li>• NGB- 22 documenting Title 10 federal active duty service</li> <li>• Self-Attestation</li> </ul>	<a href="#">Military Service OSOS Guide</a>
<b>UC (UI) Eligible Status</b> 401 Customer Detail, Gen Info tab, UI Claimant drop-down	<p>The UI Claimant field will auto-update based on the customer's UI certifications.</p> <p>If they are currently claiming, it will show Seek (Subject to Work Search).</p> <p>If they stop claiming, it will change to either None or Exhaustee.</p> <p>If the customer is determined to be Union or TLO, staff should update the field to Other (Temp Layoff or Perm Deferred).</p>	WP	A	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>• Cross-match to State UI database</li> <li>• Cross-match to State MIS database</li> <li>• Referral transmittal by RESEA or WPRS</li> <li>• Self-attestation (ONLY allowed for participants who (1) filed a claim and have been determined eligible for benefit payments under one or more state or federal Unemployment Compensation (UC) programs and whose benefit year or compensation, by reason of an extended duration period, has not ended and who has not exhausted his/her benefit rights; AND either (a) was not referred to service through the state's WPRS (profiling) system or the RESEA program; or (b) has exhausted all UC benefit rights for which he/she has been determined eligible, including extended supplemental benefit rights.</li> </ul>	
<b>Long-Term Unemployed at Program Entry</b> 402 Customer Detail, Gen Info tab	<p>Enter "yes" if the participant, at program entry, has been unemployed for 27 or more consecutive weeks.</p> <p>Enter "no" if the participant does not meet the condition described above.</p>	WP	A	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>• Self-attestation</li> <li>• Cross-match with UI database</li> <li>• Public Assistance records</li> <li>• Refugee Assistance records</li> <li>• Cross-match with Public Assistance database</li> </ul>	<a href="#">PGL 22-01 (Page 5)</a>

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<b>Highest School Grade Completed/Highest Educational Level Completed at Program Entry</b> 407, 408 Customer Detail, Gen Info tab, Education Level	Select the customer's highest completed education level from the dropdown list.							<b>Vet</b>	<ul style="list-style-type: none"> <li>Self-attestation</li> <li>Case notes</li> <li>Intake application or enrollment form</li> <li>Electronic records</li> <li>Applicable records from education institution (GED certificate, diploma, attendance record, transcripts, drop out letter, school documentation)</li> </ul>	<a href="#">Creating a Basic Customer Record OSOS Guide</a>
<b>School Status at Program Entry</b> 409 Customer Detail, Gen Info tab	<p>Select "In school, secondary school or less" if the participant, at program entry, has not received a secondary school diploma or its recognized equivalent and is attending any primary or secondary school (including elementary, intermediate, junior high school, whether full or part-time), or is between school terms and intends to return to school.</p> <p>Select "In school, alternative school" if the participant, at program entry, has not received a secondary school diploma or its recognized equivalent and is attending an alternative high school or an alternative course of study approved by the local educational agency whether full or part-time, or is between school terms and is enrolled to return to school.</p> <p>Select "In school, post-secondary school" if the participant, at program entry, has received a secondary school diploma or its recognized equivalent and is attending a postsecondary school or program (whether full or part-time), or is between school terms and is enrolled to return to school.</p> <p>Select "Not attending school or secondary school dropout" if the participant, at program entry, is not within the age of compulsory school attendance; and is no longer attending any school and has not received a secondary school diploma or its recognized equivalent.</p> <p>Select "Not attending school; secondary school graduate/equivalent" if the participant, at program entry, is not attending any school and has either graduated from secondary school or has attained a secondary school equivalency.</p> <p>Select "Not attending school, within compulsory age" if the participant, at program entry, is within the age of compulsory school attendance, but is not attending school and has not received a secondary school diploma</p>	<b>WP</b>	<b>A</b>	<b>DW</b>	<b>Y</b>	<b>NDWG</b>		<b>Vet</b>	<ul style="list-style-type: none"> <li>Self-attestation</li> <li>Case notes</li> <li>Intake application or enrollment form</li> <li>Electronic records</li> <li>Applicable records from education institution (GED certificate, diploma, attendance record, transcripts, report card or school documentation)</li> </ul>	<a href="#">Creating a Basic Customer Record OSOS Guide</a>
<b>Date of Actual Dislocation</b> 410 Customer Detail, Work History tab	Record the participant's date of actual dislocation from employment. This date is the last day of employment at the dislocation job. Leave blank if there is no dislocation job.	<b>WP</b>	<b>A</b>	<b>DW</b>		<b>NDWG</b>		<b>Vet</b>	<ul style="list-style-type: none"> <li>Self-attestation</li> <li>Verification from employer</li> <li>Rapid Response list</li> <li>Notice of layoff</li> <li>Public announcement with follow-up cross-match with UI database</li> </ul>	<a href="#">Employability Profile OSOS Guide</a>  <a href="#">Documenting Dislocated Worker Status OSOS Guide</a>
<b>Most Recent Date of Qualifying Separation</b> 411 Customer Detail, Work History tab	Record the participant's most recent date of separation from Trade-impacted employment that qualifies the participant to receive benefits and/or services under the Trade Act. This date can be found on the "Determination of Entitlement to Trade Adjustment Assistance" form (TA722) that is mailed to the participant.						<b>TAA</b>		<ul style="list-style-type: none"> <li>Self-attestation</li> <li>Verification from employer</li> <li>Rapid Response list</li> <li>Notice of layoff</li> <li>Public announcement with follow-up cross-match with UI database</li> </ul>	<a href="#">Employability Profile OSOS Guide</a>

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<b>Tenure with Employer at Separation</b> 412 Customer Detail, Work History tab	Record the total number of months the participant was employed with the employer of record as of the participant's most recent qualifying date of separation. Employment of at least one day but less than one month should be recorded as "1".							<b>TAA</b>	<b>Vet</b>	<ul style="list-style-type: none"> <li>Self-attestation</li> <li>Cross-match</li> <li>Case notes</li> <li>Verification from employer</li> <li>Worker list from firm</li> <li>Intake application or enrollment form</li> </ul>	<a href="#">Employability Profile OSOS Guide</a>
<b>Migrant and Seasonal Farmworker</b> 413 Customer Detail, Eligibility Tab	Select Yes if the participant is a Migrant or Seasonal Worker. (See element 808 for next steps).	<b>WP</b>								<ul style="list-style-type: none"> <li>Cross-Match with Public Assistance Records</li> <li>Cross-Match with State MIS Database</li> <li>Employment Records</li> <li>Case notes</li> <li>Self-Attestation</li> </ul>	<a href="#">Migrant/Seasonal Worker OSOS Guide</a>
<b>Temporary Assistance to Needy Families (TANF)</b> 600 Customer Detail, Pgms/PA tab	Select the check box next to TANF and enter the registration date if the participant is listed on a welfare grant or has received cash assistance or other support services from a TANF agency in the last six (6) months prior to participation in the program. Enter the termination date if the participant is no longer receiving aid.	<b>WP*</b>	<b>A*</b>	<b>DW*</b>			<b>NDWG*</b>		<b>Vet</b>	<p><i>*For Adult, DW, WP and NDWG programs, verification is only required if participant received Individualized Career Services or Training</i></p> <ul style="list-style-type: none"> <li>TANF eligibility verification</li> <li>TANF Period of Benefit Receipt verification</li> <li>Referral transmittal from TANF</li> <li>Cross-match with TANF Public Assistance records</li> </ul>	<a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>
<b>Exhausting TANF within two (2) years at program entry</b> 601 Customer Detail, Pgms/PA tab	Select the check box next to TANF Exhausting within 2 Years if the participant, at program entry, is within two (2) years of exhausting lifetime eligibility under part A of Title IV of the Social Security Act (42 U.S.C. 601 et seq.), regardless of whether receiving these benefits at program entry.	<b>WP*</b>	<b>A*</b>	<b>DW*</b>			<b>NDWG*</b>		<b>Vet</b>	<p><i>*For Adult, DW, WP and NDWG programs, verification is only required if participant received Individualized Career Services or Training</i></p> <ul style="list-style-type: none"> <li>TANF eligibility verification</li> <li>TANF Period of Benefit Receipt verification</li> <li>Referral transmittal from TANF</li> <li>Cross-Match with TANF Public Assistance records</li> </ul>	<a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>
<b>Supplemental Security Income (SSI)/ Social Security Disability Insurance (SSDI)</b> 602 Customer Detail, Pgms/PA tab	Select the check box next to SSI-Social Security Income Title XVI and enter the registration date if the participant is receiving or has received SSI under Title XVI of the Social Security Act in the last six (6) months prior to participation in the program. Select the check box next to SSDI-Social Security Disability Insurance and enter the registration date if the participant is receiving or has received SSDI benefit payments under Title XIX of the Social Security Act in the last six (6) months prior to participation in the program. Enter the termination date if the participant is no longer receiving aid.	<b>WP*</b>	<b>A*</b>	<b>DW*</b>					<b>Vet</b>	<p><i>*For Adult, DW, WP and NDWG programs, verification is only required if participant received Individualized Career Services or Training</i></p> <ul style="list-style-type: none"> <li>SSI/SSDI Receipt of Benefits verification</li> <li>Referral transmittal from SSA</li> <li>SSI/SSDI eligibility verification</li> <li>Cross-match with SSA database</li> </ul>	<a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>
<b>Supplemental Nutrition Assistance Program (SNAP)</b> 603 Customer Detail, Pgms/PA tab	Select the check box next to SNAP/Food Stamps and enter the registration date if the participant is receiving assistance through the Supplemental Nutrition Assistance Program (SNAP) under the Food and Nutrition Act of 2008 (7 USC 2011 et seq.) in the last six (6) months prior to participation in the program. Enter the termination date if the participant is no longer receiving aid.	<b>WP*</b>	<b>A*</b>	<b>DW*</b>					<b>Vet</b>	<p><i>*For Adult, DW, WP and NDWG programs, verification is only required if participant received Individualized Career Services or Training</i></p> <ul style="list-style-type: none"> <li>Cross-Match</li> <li>SNAP eligibility verification</li> <li>Documentation of Food Stamp Benefit Receipt</li> <li>Referral transmittal from SNAP</li> </ul>	<a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>

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<b>Other Public Assistance Recipient</b> 604 Customer Detail, Pgms/PA tab	Select the check box next to GA-General Assistance and enter the registration date if the participant is a person who is receiving or has received cash assistance or other support services from General Assistance (GA - state/local government) in the last six (6) months prior to participation in the program. Do not include foster child payments. Select the check box next to RCA-Refugee Cash Assistance and enter the registration date if the participant is a person who is receiving or has received cash assistance or other support services from Refugee Cash Assistance (RCA). Do not include foster child payments. Enter the termination date if the participant is no longer receiving aid.		<b>A</b>	<b>DW</b>					<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Copy of Authorization to Receive Cash Public Assistance</li> <li>• Copy of Public Assistance check</li> <li>• Medical Card showing Cash Grant status</li> <li>• Public Assistance Eligibility verification</li> </ul>	<a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>
<b>Pregnant or Parenting Youth</b> 701 Comp Assess, Family tab	Select the appropriate choice next to Family Status and also select yes or no to the question "Is Customer parenting youth?"				<b>Y</b>				<ul style="list-style-type: none"> <li>• Self-attestation</li> <li>• Case notes</li> <li>• Needs assessment</li> <li>• WIC eligibility verification</li> <li>• TANF single parent eligibility verification</li> <li>• Intake application or enrollment form</li> <li>• Individual Service Strategy (ISS)</li> </ul>	<a href="#">WIOA Summer Youth Employment Program (WIOA-SYEP) OSOS Guide</a>
<b>Youth who Needs Additional Assistance</b> 702 Comp Assess, Employment tab	Select yes if the participant is an out-of-school youth who requires additional assistance to enter or complete an educational program, or to secure and hold employment, or an in-school youth who requires additional assistance to complete an educational program or to secure or hold employment as defined by Local Workforce Development Board policy. Please note, per TEG 9-22, there is one exception to the reporting of all youth eligibility barriers - in-school youth who require additional assistance to complete an education program or secure or hold employment. For this particular barrier, it is important that local programs report it only when it is a participant's sole eligibility barrier.				<b>Y</b>				See state policy on definition: <ul style="list-style-type: none"> <li>• Self-attestation</li> <li>• Intake application or enrollment form</li> <li>• Case notes</li> <li>• Needs assessment</li> <li>• Individual Service Strategy (ISS)</li> </ul>	<a href="#">See LWDB Policy and TA 19-02</a>
<b>Foster Care Youth Status at Program Entry</b> 704 Comp Assess, Housing tab, Current Housing	In the Housing Information section, select "Foster Child" if the participant, at program entry, is a person less than 18 years old who is currently in foster care. Select "Aged out of Foster Care" if the person is 18-24 and has aged out of the foster care system.	<b>WP</b>	<b>A</b>	<b>DW</b>	<b>Y</b>	<b>NDWG</b>		<b>Vet</b>	<ul style="list-style-type: none"> <li>• Self-attestation</li> <li>• Case notes</li> <li>• Written confirmation from Social Services Agency</li> <li>• Foster Care Agency Referral transmittal</li> <li>• Intake application or enrollment form</li> <li>• Needs assessment</li> <li>• Individual Service Strategy (ISS)</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>

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<b>Homeless at program entry</b> 800 Comp Assess, Housing Tab, Current Housing	<p>Select Homeless from the drop-down list next to Current Housing if the participant, at program entry:</p> <p>(a) Lacks a fixed, regular, and adequate nighttime residence, which includes a participant who:</p> <p>(i) Is sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason;</p> <p>(ii) Is living in a motel, hotel, trailer park, or campground due to a lack of alternative adequate accommodations;</p> <p>(iii) Is living in an emergency or transitional shelter;</p> <p>(iv) Is abandoned in a hospital; or</p> <p>(v) Is awaiting foster care placement.</p> <p>(b) Has a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings, such as a car, park, abandoned building, bus or train station, airport, or camping ground;</p> <p>(c) Is a migratory child who in the preceding 36 months was required to move from one school district to another due to changes in the parent's or parent's spouse's seasonal employment in agriculture, dairy, or fishing work; or</p> <p>(d) Is under 18 years of age and absents himself or herself from home or place of legal residence without the permission of his or her family (i.e., runaway youth).</p> <p>This definition does not include a participant imprisoned or detained under an Act of Congress or State law. A participant who may be sleeping in a temporary accommodation while away from home should not, as a result of that alone, be recorded as homeless.</p> <p>Note: WIOA youth who meet the definition of homeless as defined in WIOA section 681.210(c)(5) and 681.220(d)(4) are reported in this data element.</p>	WP	A	DW	Y	NDWG		Vet	<ul style="list-style-type: none"> <li>• Self-attestation</li> <li>• Case notes</li> <li>• Intake application or enrollment form</li> <li>• Written statement or referral transmittal from a shelter or Social Service Agency</li> <li>• Needs assessment</li> <li>• Individual Service Strategy (ISS)</li> <li>• A letter from caseworker or support provider</li> </ul>	<a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>
<b>Ex-Offender at program entry</b> 801 Comp Assess, Legal tab, Offender Status	<p>Select yes if the participant, at program entry, is a person who either (a) has been subject to any stage of the criminal justice process for committing a status offense or delinquent act, or (b) requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction.</p> <p>Select no if the participant does not meet any one of the conditions described above.</p> <p>Select not disclosed if the participant did not disclose.</p>	WP	A	DW	Y	NDWG		Vet	<ul style="list-style-type: none"> <li>• Self-attestation</li> <li>• Case notes</li> <li>• Documentation from the Juvenile or Adult Criminal Justice System</li> <li>• Written statement or referral document from a Court or Probation Officer</li> <li>• Referral transmittal from a Reintegration Agency</li> <li>• Intake application or enrollment form</li> <li>• Needs assessment</li> <li>• Individual Service Strategy (ISS)</li> <li>• Federal Bonding Program application</li> </ul>	<a href="#">See Comprehensive Assessment and Supplemental Data OSOS Guide</a>

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<b>Low Income Status at program entry</b> 802 Customer Detail, Eligibility tab (or Pgms/PA tab, or Comp Assess- Housing tab)	<p>A person is considered low income if he or she:</p> <p>(a) Receives, or in the six (6) months prior to application to the program has received, or is a member of a family that is receiving or in the past six (6) months prior to application to the program has received:</p> <p>(i) Assistance through the supplemental nutrition assistance program (SNAP) under the Food and Nutrition Act of 2008 (7 USC 2011 et seq.);</p> <p>(ii) Assistance through the temporary assistance for needy families (TANF) program under part A of Title IV of the Social Security Act (42 USC 601 et seq.);</p> <p>(iii) Assistance through the supplemental security income (SSI) program under Title XVI of the Social Security Act (42 USC 1381); or</p> <p>(iv) State or local income-based public assistance.</p> <p>(b) Is in a family with total family income that does not exceed the higher of the poverty line or 70% of the lower living standard income level;</p> <p>(c) Is an individual who receives, or is eligible to receive a free or reduced price lunch under the Richard B. Russell National School Lunch Act (42 USC 1751 et seq.);</p> <p>(d) Is a foster child on behalf of whom State or local government payments are made;</p> <p>(e) Is a participant with a disability whose own income is the poverty line but who is a member of a family whose income does not meet this requirement;</p> <p>(f) Is a homeless participant or a homeless child or youth or runaway youth; or</p> <p>(g) Is a youth living in a high poverty area.</p>	WP*	A*	DW*	Y	NDWG*		Vet	<p><i>*For Adult, DW, WP and NDWG programs, verification is only required if participant received Individualized Career Services or Training</i></p> <p><i>*For Youth Living in a High Poverty Area: Case notes documenting High Poverty Area status.</i></p> <ul style="list-style-type: none"> <li>• Self-attestation</li> <li>• Cross-match with Refugee Assistance records</li> <li>• Cross-match with Public Assistance records</li> <li>• Cross-match with UI Wage records</li> <li>• Award letter from Veteran's Administration</li> <li>• Bank statements</li> <li>• Pay stubs</li> <li>• Compensation award letter</li> <li>• Court award letter</li> <li>• Pension statement</li> <li>• Employer statement/contact</li> <li>• Family or business financial records</li> <li>• Housing Authority verification</li> <li>• Quarterly Estimated Tax for Self-Employed Persons</li> <li>• Social Security benefits</li> <li>• UI claim documents</li> <li>• Copy of Authorization to Receive Cash Public Assistance</li> <li>• Copy of Public Assistance check</li> <li>• Public Assistance eligibility verification</li> </ul>	<a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>
<b>English Language Learner at program entry</b> 803 Comp Assess, Education tab, English Language Learner	<p>Select yes if the participant, at program entry, is a person who has limited ability in speaking, reading, writing or understanding the English language and also meets at least one of the following two conditions: (a) their native language is a language other than English; or (b) they live in a family or community environment where a language other than English is the dominant language.</p> <p>Select no if the participant does not meet the conditions described above.</p>	WP	A	DW	Y	NDWG		Vet	<ul style="list-style-type: none"> <li>• Self-attestation</li> <li>• Case notes</li> <li>• Assessment test results</li> <li>• Applicable records from education institution (transcripts or other school documentation)</li> <li>• Intake application or enrollment form</li> <li>• Individual Service Strategy (ISS)</li> </ul>	<a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>
<b>Basic Skills Deficient/Low Levels of Literacy at program entry</b> 804 Comp Assess, Education tab, Basic Skills Deficient/Low Levels of Literacy	<p>Select yes if the participant is, at program entry:</p> <p>A) A youth, who has English reading, writing, or computing skills at or below the 8th grade level on a generally accepted standardized test; or</p> <p>B) A youth or adult, who is unable to compute and solve problems, or read, write, or speak English at a level necessary to function on the job, in the participant's family, or in society. Please note that LWDB policy must be followed when option B is used.</p> <p>Select no if the participant does not meet the conditions described above.</p>	WP*	A*	DW*	Y	NDWG*		Vet	<p><i>*For Adult, DW, WP and NDWG programs, verification is only required if participant received Individualized Career Services or Training</i></p> <ul style="list-style-type: none"> <li>• Assessment test results</li> <li>• Applicable Records from Education Institution (transcripts, academic assessments, or other school documentation)</li> <li>• Case notes</li> </ul>	<a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Single Parent at Program Entry</b> 806 Comp Assess, Family tab, Family Status	<p>Select parent in a one-parent family if the participant, at program entry, is single, separated, divorced or a widowed individual who has primary responsibility for one (1) or more dependent children under age 18 (including single pregnant women).</p> <p>If the participant does not meet the criteria for a parent in a one-parent family, select the option that best describes the participant's circumstances at program entry: parent in a two-parent family, other family member, or not a family member. Select not disclosed if the participant did not disclose their family status.</p>	WP	A	DW	Y	NDWG		Vet	<ul style="list-style-type: none"> <li>Needs Assessment</li> <li>TANF Single Parent Eligibility Verification</li> <li>Intake Application or Enrollment Form</li> <li>Individual Service Strategy or Employment Plan</li> <li>Case notes</li> <li>Self-Attestation</li> </ul>	<a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>
<b>Displaced Homemaker at Program Entry</b> 807 Customer Detail, Work History Tab, Reason for Leaving	<p>Select Category 4 DW - Displaced Homemaker as the Reason for Leaving if the participant, at program entry, has been providing unpaid services to family members in the home and who:</p> <p>(A)(i) has been dependent on the income of another family member but is no longer supported by that income; or (ii) is the dependent spouse of a member of the Armed Forces on active duty (as defined in section 101(d)(1) of title 10, United States Code) and whose family income is significantly reduced because of a deployment (as defined in section 991(b) of title 10, United States Code, or pursuant to paragraph (4) of such section), a call or order to active duty pursuant to a provision of law referred to in section 101(a)(13)(B) of title 10, United States Code, a permanent change of station, or the service-connected (as defined in section 101(16) of title 38, United States Code) death or disability of the member; and</p> <p>(B) is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.</p>	WP	A	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>Self-attestation</li> <li>Intake application or enrollment form</li> <li>Cross-match with Public Assistance records</li> <li>Copy of spouse's layoff notice</li> <li>Copy of spouse's death record</li> <li>Copy of spouse's Permanent Change of Station (PCS) orders (for a military move or assignment)</li> <li>Copy of divorce records</li> <li>Copy of applicable court records</li> <li>Copy of bank records (showing financial dependence on spouse, no separate individual income support, or no employment income earned)</li> <li>Needs assessment</li> <li>Individual Employment Plan (IEP)</li> </ul>	<a href="#">Documenting Dislocated Worker Status OSOS Guide</a>
<b>Migrant and Seasonal Farmworker Status</b> 808 Customer Detail, Eligibility tab, Migrant Info	<p>After selecting yes for Migrant/Seasonal Worker (element 413), a drop-down menu will appear. Select the option that best describes the worker's experience.</p>	WP	A	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>Cross-Match with Public Assistance Records</li> <li>NFJP Eligibility Documents used to determine low-income status</li> <li>Employer Contract/Letter</li> <li>Program application</li> <li>Cross-Match with State MIS Database</li> <li>Cross-Match with H-1B Records</li> <li>Case notes</li> <li>Self-Attestation</li> </ul>	<a href="#">Migrant/Seasonal Worker OSOS Guide</a>
<b>Date of Program Entry</b> 900	<p>Program Entry Date is automatically created by OSOS based on activity/service entries.</p>	WP	A	DW	Y	NDWG		Vet	<ul style="list-style-type: none"> <li>Individual Plan for Employment</li> <li>Electronic Records</li> <li>Program intake documents, such as eligibility determination documentation or program enrollment forms</li> </ul>	<a href="#">TA 11-07 Common Exits and Enrollments</a>



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		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Date of Program Exit</b> 901	Program Exit Date is automatically created by OSOS based on activity/service entries (unless an "Other Reason for Exit" is entered).	WP	A	DW	Y	NDWG	TAA	Vet	<ul style="list-style-type: none"> <li>• A copy of the letter sent to the individual indicating that the case was closed</li> <li>• WIOA status/exit forms</li> <li>• Electronic Records</li> <li>• Attendance records</li> <li>• Review of service records identifying the last qualifying service (and lack of a planned gap)</li> </ul>	<a href="#">TA 11-07 Common Exits and Enrollments</a>
<b>Date of First Case Management and Employment Service</b> 902 Services window, Services tab, Detail section	Record the date on which the participant begins receiving his/her first case management and employment service funded by a program following a determination of eligibility to participate in the program.						TAA		<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Case notes</li> </ul>	<a href="#">Trade Adjustment Assistance - Enrollment and Entering the First Service OSOS Guide</a>
<b>Date of First WIOA Youth Service</b> 906 Services window, Services tab, Detail section	Record the date on which the participant began receiving his/her first WIOA youth service (i.e. 1 of the 14 youth program elements in WIOA §129(c)(2)).				Y				<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> <li>• Individual Service Strategy</li> </ul>	<a href="#">Provider Search and Documenting Services to Youth Program Customers</a>
<b>Recipient of Incumbent Worker Training</b> 907 Services window, Services tab, Funding section	Enter the appropriate funding source for individuals who received Incumbent Worker training services under (1) WIOA section 134(a)(3)(A)(i) and/or 134(a)(2)(A)(i); or (2) under Local Formula funds under WIOA section 134(d)(4); or (3) under both Statewide funds (Governor's Reserve and/or Rapid Response) WIOA section 134(a)(3)(A)(i) and/or 134(a)(2)(A)(i) and Local Formula funds under WIOA section 134(d)(4); or (4) under H1B; or (5) under a National Dislocated Worker Grant (DWG) (WIOA section 170); or (6) under a National Farmworker Job Program (NFJP)(WIOA section 167).	WP	A	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>• Signed Incumbent Worker Training agreement</li> <li>• Cross-Match</li> <li>• Case notes</li> </ul>	<a href="#">Creating Providers, Services and Offerings - OSOS Guide</a>
<b>Rapid Response</b> 908 Customer Detail, Work History tab	Enter the RR Event # and complete all required data fields on the Work History tab if the participant participated in Rapid Response activities authorized at WIOA section 134(a)(2)(A)(i)(I).	WP		DW		NDWG		Vet	<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Case notes</li> <li>• Rapid Response List</li> <li>• Self-Attestation</li> </ul>	<a href="#">OSOS-Guide-RAPID-EXPEDITIOUS RESPONSE 6-21-2013</a>
<b>TAA Petition Number</b> 915 Customer Detail, Work History tab	Enter the TAA Petition Number in the appropriate box. The TAA Petition Number can be found on the "Determination of Entitlement to Trade Adjustment Assistance" form (TA722) that is mailed to the participant.						TAA		<ul style="list-style-type: none"> <li>• Employer worker list</li> <li>• Designation of eligibility form</li> <li>• Case notes</li> </ul>	<a href="#">Trade Adjustment Assistance - Eligibility and Intake OSOS Guide</a>

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		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Other Reasons for Exit</b> 923 Customer Detail, Pgms/PA tab	<p>Select <u>Institutionalized (Incarcerated/Resident of 24-Hr Support Facility)</u> from the Exit Reason drop-down list if the participant exits the program because they have become incarcerated in a correctional institution or have become a resident of an institution or facility providing 24-hour support such as a hospital or treatment center during the course of receiving services as a participant.</p> <p>Select <u>Receiving Health/Medical Treatment</u> from the Exit Reason drop-down list if the participant exits the program because of medical treatment and that treatment is expected to last longer than 90 days and precludes entry into unsubsidized employment or continued participation in the program.</p> <p>Select <u>Participant Deceased</u> if the participant is deceased.</p> <p>Select <u>Reserve Forces called to Active Duty</u> if the participant exits the program because the participant is a member of the National Guard or other reserve military unit of the armed forces and is called to active duty for at least 90 days.</p> <p>Select <u>Foster Care (Youth Only)</u> if the participant is in the foster care system and exits the program because the participant has moved from the area as part of such a program or system (Youth participants only).</p> <p><u>Participant Determined Ineligible</u> only applies to the Vocational Rehabilitation (VR) program; only VR staff may use this.</p> <p>Select <u>Correctional Institution (Criminal Offender)</u> if the participant is a criminal offender in a correctional institution.</p>	WP	A	DW	Y	NDWG	TAA	Vet	<ul style="list-style-type: none"> <li>Electronic records</li> <li>Information from partner services</li> <li>WIOA or program status/exit forms</li> <li>Withdrawal form with explanation</li> <li>Information from institution or facility</li> <li>Case notes</li> </ul>	<a href="#">Non-Service Event Button - OSOS Guide</a>
<b>TAA Application Date</b> 924 Customer Detail, Work History tab	Record the date on which the individual first applied for Trade Act services/benefits under the applicable certification. The date is listed on the Trade Act Tracker.						TAA		<ul style="list-style-type: none"> <li>Electronic records</li> <li>Designation on eligibility form</li> <li>TAA Application Form</li> <li>Cross-Match</li> </ul>	<a href="#">Trade Adjustment Assistance - Enrollment and Entering the First Service OSOS Guide</a>
<b>Date of First TAA Benefit or Service</b> 925 Services window, Services tab, Detail section	Record the date of the first Trade-funded benefit or service received after the participant was determined eligible to participate.						TAA		<ul style="list-style-type: none"> <li>Case notes</li> <li>Cross-Match</li> <li>Electronic Records</li> </ul>	<a href="#">Trade Adjustment Assistance - Enrollment and Entering the First Service OSOS Guide</a>
<b>Date of Staff-Assisted Basic Career Service</b> 1001, 1003 Customer Detail, Activity tab or Services window, Services tab	Record the date the participant received any <b>staff-assisted</b> basic services. This includes any career service under WIOA section 134(c)(2)(A)(i)-(xi) that is not provided via self-service or information-only services and activities).	WP	AD	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>Case notes</li> <li>Cross-Match</li> <li>Electronic Records</li> </ul>	<a href="#">Creating Providers, Services and Offerings - OSOS Guide</a>

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		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Date of Self-Service/ Information Only (SSIO) Basic Career Service</b> 1002 Customer Detail, Activity tab	<p>Some self-service activities are recorded automatically, for example, when customers access their JobZone accounts.</p> <p>Others, such as "Utilized Resource Room" must be data entered by staff. Record the date the job seeker accessed self-service/information only (SSIO) services or activities either at a physical location or remotely via the use of electronic technologies.</p> <p>Self service does not uniformly apply to all virtually accessed services. For example, virtually accessed services that provide a level of support above independent job or information seeking on the part of a reportable individual/participant would not qualify as self service. Information only activities or services may be either</p>	WP	AD	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>Case notes</li> <li>Cross-Match</li> <li>Electronic Records</li> </ul>	
<b>Date of Most Recent Career Service</b> 1004 Customer Detail, Activity tab or Services window, Services tab	Record the date on which career services (both basic and individualized) were last received (excluding self services, information services or activities, or follow-up services).	WP	AD	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>Case notes</li> <li>Cross-Match</li> <li>Electronic Records</li> </ul>	
<b>Date of Most Recent DVOP-assisted Service</b> 1005 Customer Detail, Activity tab	<p>Record the most recent date on which the participant received any career service provided by a DVOP Specialist.</p> <p>Leave blank if the participant did not receive a career service with significant staff involvement or this data element does not apply to the participant.</p>	WP	AD	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>Case notes</li> <li>Cross-Match</li> <li>Electronic Records</li> </ul>	
<b>Date Referred to VA Voc Rehab and Employment Program</b> 1006 Customer Detail, Activity tab or Services Window, Services tab	Record the most recent date on which the participant was referred to the Dept. of Veterans Affairs Vocational Rehabilitation and Employment Program.	WP	AD	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>Case notes</li> <li>Cross-Match</li> <li>Electronic Records</li> </ul>	
<b>Date of Most Recent Reportable Individual Contact</b> 1007 Customer Detail, Activity tab or Services, Services tab	Record the most recent date on which the job seeker had reportable individual level contact, including provision of identifying information or enrollment, with one or more applicable programs.	WP	AD	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>Case notes</li> <li>Cross-Match</li> <li>Electronic Records</li> </ul>	

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Date of Individualized Career Service</b> 1200, 1201 Customer Detail, Activity tab or Services window, Services tab	Record the date the participant received any individualized career service on or after the date of participation. Individualized career services include development of an Individual Employment Plan, Pre-Vocational services, provision of comprehensive skills and career assessments, internships or work experiences, financial literacy services, English as Second Language Services, or any other service that comprises a significant amount of staff time with an individual participant as described in WIOA sec. 134(c)(2)(xii).	WP	AD	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>Case notes</li> <li>Cross-Match</li> <li>Electronic Records</li> </ul>	
<b>Date Individual Employment Plan Created</b> 1202 Customer Detail, Activity tab or Services window, Services tab	Record the date on which the participant's Individual Employment Plan (IEP) was created or otherwise established to identify the participant's employment goals, their appropriate achievement objectives, and the appropriate combination of services for the participant to achieve the employment goals.	WP	AD	DW		NDWG	TAA	Vet	<ul style="list-style-type: none"> <li>Case notes</li> <li>Cross-Match</li> <li>Electronic Records</li> </ul>	
<b>Type of Work Experience</b> 1205 Services window, Services tab	If the participant received a work experience, record the type of work experience provided. Options include (1) summer employment or an internship during the summer months (WIOA Youth); (2) internship or employment opportunity during the non-summer months or if it extends beyond the summer months; (3) pre-apprenticeship program; (4) job shadowing; (5) on-the-job training (WIOA Youth); (6) transitional job, as defined in WIOA Section 134(d)(5); (7) another type of work experience not covered in 1 through 6. NOTE: Other type of work experience should only be selected when other work experience opportunities are provided that are not captured elsewhere and may only be used for Adult, Dislocated Worker, and Dislocated Worker Grants programs only. NOTE: If employment opportunities not limited to summer months are part of a pre-apprenticeship program, or if on-the-job training for WIOA Youth is part of a pre-apprenticeship program, choose pre-apprenticeship.	WP	AD	DW	Y	NDWG		Vet	<ul style="list-style-type: none"> <li>Case notes</li> <li>Signed Work Experience Agreement</li> <li>Electronic Records</li> </ul>	<a href="#">For Youth only: WIOA Youth Services Brief</a>
<b>Date Received Financial Literacy Services</b> 1206 Services window, Services tab	Record the date that the participant received any financial literacy services. They may include services that help with creating budgets, initiate checking and savings accounts at banks, applying for and managing loans and credit cards, learning about credit reports and credit scores, and identifies identity theft.	WP	AD	DW	Y	NDWG		Vet	<ul style="list-style-type: none"> <li>Activity sheets</li> <li>Sign-in sheets</li> <li>Attendance record</li> <li>Vendor contract</li> <li>Case notes</li> <li>Electronic Records</li> </ul>	<a href="#">For Youth only: WIOA Youth Services Brief</a>
<b>Transitional Jobs</b> 1211 Services window, Services tab	Enter a service if the participant received work experience at a transitional job as described in WIOA Section 134(d)(5).		AD	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>Electronic Records</li> <li>Case notes</li> <li>Signed Transitional Job Agreement</li> </ul>	<a href="#">For Youth only: WIOA Youth Services Brief</a>
<b>Received Training</b> 1300 Services window, Services tab	Enter a service if the participant received training services.	WP	AD	DW	Y	NDWG		Vet	<ul style="list-style-type: none"> <li>Cross-Match</li> <li>Vendor/Training Provider Records</li> <li>Signed Training Contract</li> <li>Individual Training Account (ITA)</li> <li>Electronic Records</li> </ul>	<a href="#">OSOS-Guide-Creating-Providers-Services-and-Offerings</a>

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Eligible Training Provider - Name - Training Service</b> 1301 Services window, Services tab, Detail section	Enter the name of the eligible training provider where the participant received training.		AD	DW		NDWG			<ul style="list-style-type: none"> <li>• Vendor Training Records</li> <li>• Receipts</li> <li>• Cross-Match</li> <li>• Attendance Sheets or Records</li> <li>• Signed Training Contract</li> <li>• Individual Training Account (ITA)</li> </ul>	<a href="#">New York State Eligible Training Provider List (ETPL)</a> <a href="#">OSOS Guide</a>
<b>Date Entered Training</b> 1302, 1309, 1314 Services window, Services tab, Detail section, Actual Start Date	Record the date on which the participant's training service actually began.		A	DW	Y	NDWG	TAA		<ul style="list-style-type: none"> <li>• Attendance sheets or records</li> <li>• Case notes</li> <li>• Vendor training records</li> <li>• Individual Training Account (ITA)</li> <li>• Electronic Records</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Type of Training Service</b> 1303, 1310, 1315 Services window, Services tab, Detail section, Program Service Type	Select the appropriate program service type from the drop-down menu.		A	DW	Y	NDWG	TAA	Vet	<ul style="list-style-type: none"> <li>• Copy of enrollment record</li> <li>• Case notes</li> <li>• Cross match between dates of service and vendor training information</li> <li>• Vendor training documentation</li> <li>• Electronic records</li> <li>• Individual Training Account (ITA)</li> <li>• Attendance Records</li> </ul>	
<b>Occupational Skills Training Code</b> 1306, 1311, 1316 Services window, Services tab	Enter the 8-digit O*Net code that best describes the training occupation for which the participant received training services. NOTE: If all 8 digits of the occupational skills code are not collected, record as many digits as are available. If the participant receives multiple training services, use the occupational skills training code for the most recent training.		AD	DW	Y	NDWG	TAA		<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Case notes</li> <li>• Signed Individual Employment Plan or Training Plan</li> <li>• Signed Training Contract</li> <li>• Individual Training Account (ITA)</li> </ul>	<a href="#">osos-guide-onet</a>
<b>Training Completed</b> 1307, 1312, 1317 Services window, Training Outcomes tab	Enter the completion date and attainment status.		A	DW	Y	NDWG	TAA		<ul style="list-style-type: none"> <li>• Cross-match</li> <li>• Case notes</li> <li>• Vendor training records</li> <li>• Electronic Record</li> <li>• Individual Training Account (ITA)</li> <li>• Attendance Sheets or Records</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Date Completed, or Withdrew from Training</b> 1308, 1313, 1318 Services window, Services tab, Detail section, Actual End Date	Record the date when the participant completed training or withdrew permanently from training.		A	DW	Y	NDWG	TAA		<ul style="list-style-type: none"> <li>• Cross-match</li> <li>• Case notes</li> <li>• Vendor training records</li> <li>• Attendance Sheets or Records</li> <li>• Electronic Record</li> </ul>	

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Established Individual Training Account (ITA)</b> 1319 Services window, Services tab, Detail section, Program Service Type	Enter an ITA service if any of the individual's services were purchased utilizing an Individual Training Account funded by WIOA Title I. This information can be updated anytime during participation.		A	DW		NDWG			<ul style="list-style-type: none"> <li>Cross-Match</li> <li>Case notes</li> <li>Individual Training Account (ITA) Approval, Allocation or Activation Records</li> </ul>	<a href="#">OSOS-Guide-Creating-Providers-Services-and-Offerings</a>
<b>Waiver from Training Requirement</b> 1321 Services window, Services tab	Document the reason a TAA participant will not be able to participate in training before the deadline. Options are health, training not available, and enrollment unavailable.						TAA		<ul style="list-style-type: none"> <li>Waiver documentation in case file (that includes initial approval and renewals at 30-day intervals)</li> <li>Cross-match with state UI records of TRA checks</li> <li>Verification from UI or Employment Counselor</li> </ul>	<a href="#">Trade Adjustment Assistance - Training Waivers OSOS Guide</a>
<b>Date of Most Recent Case Management and Reemployment Service</b> 1322 Services window, Services tab	Enter the date on which the participant received his or her most recent Case Management and Reemployment Service.						TAA		<ul style="list-style-type: none"> <li>Cross-match</li> <li>Case Notes</li> </ul>	
<b>Date Waiver from Training Requirement Issued</b> 1323 Services window, Services tab	This is the date of the waiver service.						TAA		<ul style="list-style-type: none"> <li>Waiver documentation in case file</li> <li>Cross-match with state UI database</li> <li>Verification from UI or Employment Counselor</li> </ul>	<a href="#">Trade Adjustment Assistance - Training Waivers OSOS Guide</a>
<b>Participated in Postsecondary Education during Program Participation</b> 1332 Services window, Trng Outcomes tab	Enter training details on the Trng Outcomes tab for participants who were in a postsecondary education program that leads to a credential or degree from an accredited postsecondary education institution at any point during program participation.		A	DW	Y	NDWG			<ul style="list-style-type: none"> <li>Data match with postsecondary data system</li> <li>Copy of enrollment record</li> <li>School records</li> <li>Transcript or report card</li> <li>Case notes</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Enrolled in Secondary Education Program</b> 1401 Services window, Trng Outcomes tab	<p>Enter training details on the Trng Outcomes tab for participants who were enrolled in a secondary education program at or above the 9th grade level. This includes both secondary school and enrollment in a program of study with instruction designed to lead to a high school equivalent credential.</p> <p>Programs of study designed to teach English proficiency skills or literacy skills below the 9th grade equivalent are not considered secondary education programs. Participants are included whether they entered training before enrollment or during enrollment.</p>		A	DW	Y	NDWG			<ul style="list-style-type: none"> <li>• Copy of enrollment record</li> <li>• School records</li> <li>• Transcript or report card</li> <li>• Data match to State K-12 data system</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Most Recent Date Received Educational Achievement Services</b> 1402 Services window, Services tab	<p>Record the most recent date on which the participant received an educational achievement service. Educational achievement services include, but are not limited to tutoring, study skills training, instruction, and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential.</p>				Y				<ul style="list-style-type: none"> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> <li>• Cross-Match</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>
<b>Most Recent Date Received Alternative Secondary School Services</b> 1403 Services window, Services tab	<p>Record the most recent date on which the participant received alternative secondary school services, or dropout recovery services, as appropriate.</p>				Y				<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor Contract</li> <li>• Electronic Records</li> <li>• Case Notes</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>
<b>Most Recent Date Received Work Experience Opportunities</b> 1405 Services window, Services tab	<p>Record the most recent date on which the youth participant received work experience opportunities that have as a component academic and occupational education. Work experiences are a planned, structured learning experience that takes place in a workplace for a limited period of time. Work experiences include: summer employment opportunities and other employment opportunities available throughout the school year; pre-apprenticeship programs; internships and job shadowing; and on-the-job training opportunities.</p>				Y				<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor Contract</li> <li>• Electronic Records</li> <li>• Case Notes</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>
<b>Date Enrolled in Post Exit Education or Training Program Leading to a Recognized Postsecondary Credential</b> 1406 Services window, Trng Outcomes tab	<p>Enter the date the participant is enrolled in an education or training program that leads to a recognized postsecondary credential after program exit.</p>		A	DW	Y	NDWG			<ul style="list-style-type: none"> <li>• Copy of enrollment record</li> <li>• School records</li> <li>• Transcript or report card</li> <li>• Case notes</li> <li>• Cross-Match</li> </ul>	<a href="#">See WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Most Recent Date Received Education Offered Concurrently with Workforce Preparation</b> 1407 Services window, Services tab	Record the most recent date on which the participant received education offered concurrently with and in in the same context as workforce preparation activities and training for a specific occupation or occupational cluster.				Y				<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>
<b>Most Recent Date Received Leadership Development Opportunities</b> 1408 Services window, Services tab	Record the most recent date on which the participant received services that include, but are not limited to, opportunities that may include community service and peer-centered activities encouraging responsibility and other positive social and civic behaviors, as appropriate.				Y				<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>
<b>Most Recent Date Received Supportive Services</b> 1409 Services window, Services tab	Record the most recent date on which the participant received a supportive service (WIOA section 134(d)(2)) which includes, but is not limited to, assistance with transportation, child care, dependent care, and housing that are necessary to enable the participant to participate in programs which provide career and training services as defined in WIOA sec. 134(c)(2) and 134(c)(3). Support services for youth participants include; (a) linkages to community services; (b) assistance with transportation; (c) assistance with child care and dependent care; (d) assistance with housing; (e) needs-related payments; (f) assistance with educational testing; (g) reasonable accommodations for youth with disabilities; (h) referrals to healthcare; (i) assistance with uniforms or other appropriate work attire and work-related tools, including such items as eye glasses and protective eye gear; (j) assistance with books, fees, school supplies, and other necessary items for students enrolled in postsecondary education classes; and (k) payments and fees for employment and training-related applications, tests, and certifications.		A	DW	Y	NDWG			<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>
<b>Most Recent Date Received Adult Mentoring Services</b> 1410 Services window, Services tab	Record the most recent date on which the participant received adult mentoring services. Adult mentoring services may last for at least twelve (12) months and may occur both during and after program participation.				Y				<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>



Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Most Recent Date Received Comprehensive Guidance/Counseling Services</b> 1411 Services window, Services tab	Record the most recent date on which the participant received comprehensive guidance and counseling services, which may include drug and alcohol abuse counseling.				Y				<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>
<b>Most Recent Date Received Youth Follow-Up Services</b> 1412 Services window, Services tab	<p>Record the most recent date on which the youth participant received follow-up services after exiting the program. Follow-up services for youth participants are described as: critical services provided following a youth's exit from the program to help ensure the youth is successful in employment and/or postsecondary education and training. Follow-up services may include regular contact with a youth participant's employer, including assistance in addressing work-related problems that arise.</p> <p>Follow-up services for youth may also include the following program elements: (1) Supportive services; (2) Adult mentoring; (3) Financial literacy education; (4) Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and (5) Activities that help youth prepare for and transition to postsecondary education and training.</p> <p>All youth participants must be offered the opportunity to receive follow-up services that align with their Individual Service Strategies. Furthermore, follow-up services must be provided to all participants for a minimum of 12 months unless the participant declines to receive follow-up services or the participant cannot be located or contacted.</p>				Y			<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>	
<b>Most Recent Date Received Entrepreneurial Skills Training</b> 1413 Services window, Services tab	Record the most recent date on which the participant participated in entrepreneurial skills training.				Y				<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>
<b>Most Recent Date Youth Received Services that Provide LMI</b> 1414 Services window, Services tab	Record the most recent date on which a Youth participated in services that provide labor market and employment information (LMI) about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services.				Y				<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Most Recent Date Youth Received Postsecondary Transition and Preparatory Activities</b> 1415 Services window, Services tab	Record the most recent date on which a Youth received activities that helped them to prepare for and transition to postsecondary education and training.				Y				<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Youth Program Services Brief</a>
<b>Received Needs-Related Payments</b> 1500, 1535 Services window, Services tab	Enter a service if the participant received needs-related payments (WIOA section 134(d)(3)) for the purpose of enabling the participant to participate in approved training funded under WIOA Title IB.		A	DW		NDWG			<ul style="list-style-type: none"> <li>• Cross-Match</li> <li>• Request for allowance</li> <li>• Activity sheets</li> <li>• Sign-in sheets</li> <li>• Attendance record</li> <li>• Vendor contract</li> <li>• Electronic Records</li> <li>• Case notes</li> </ul>	<a href="#">For Youth only: WIOA Youth Services Brief</a>
<b>Employed in 1st and 3rd Quarter after Exit Quarter</b> 1600, 1604 Services window, Empl Outcomes tab	Enter employment outcomes on the Employment Outcomes tab. Select the type of employment from the drop-down list (military, registered apprenticeship or unsubsidized employment).	WP	A	DW	Y	NDWG		Vet	<ul style="list-style-type: none"> <li>• UI wage data match/administrative wage match, such as the National Directory of New Hires</li> <li>• Follow-up survey from program participants</li> <li>• Detailed case notes verified by employer and signed by the counselor</li> <li>• Pay check stubs, tax records, W2 form</li> <li>• Quarterly tax payment forms, such as IRS form 941</li> <li>• Document from employer on company letterhead attesting to an individual's employment status and earnings</li> <li>• Self-employment worksheets signed and attested to by program participants</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Employed in 2nd (3rd, 4th) Quarter after Exit Quarter</b> 1602, 1606 Services window, Empl Outcomes tab	Enter employment outcomes on the Employment Outcomes tab. Select the type of employment from the drop-down list (military, registered apprenticeship or unsubsidized employment).	WP	A	DW	Y	NDWG	TAA	Vet	<ul style="list-style-type: none"> <li>• UI wage data match/administrative wage match, such as the National Directory of New Hires</li> <li>• Follow-up survey from program participants</li> <li>• Detailed case notes verified by employer and signed by the counselor</li> <li>• Pay check stubs, tax records, W2 form</li> <li>• Quarterly tax payment forms, such as a IRS form 941</li> <li>• Document from employer on company letterhead attesting to an individual's employment status and earnings</li> <li>• Self-employment worksheets signed and attested to by program participants</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Type of Employment Match 1st (2nd, 3rd, 4th) Quarter after Exit Quarter</b> 1601, 1603, 1605, 1607 Services window, Empl Outcomes tab	Identify the method used in determining the participant's employment status in the first (second, third, fourth) quarter following the quarter of exit. Wage records will be the primary data source for tracking employment. If the participant is not found in wage records, grantees may then use supplemental data sources. If the participant is found in more than one source of employment using wage records, record the data source or which the participant's earnings are greatest.	WP	A	DW	Y	NDWG		Vet	<ul style="list-style-type: none"> <li>• UI wage data match/administrative wage match, such as the National Directory of New Hires</li> <li>• Follow-up survey from program participants</li> <li>• Detailed case notes verified by employer and signed by the counselor</li> <li>• Pay check stubs, tax records, W2 form</li> <li>• Quarterly tax payment forms, such as a IRS form 941</li> <li>• Document from employer on company letterhead attesting to an individual's employment status and earnings</li> <li>• Self-employment worksheets signed and attested to by program participants</li> </ul>	
<b>Employment Related to Training</b> 1608 Services window, Empl Outcomes tab	In the drop-down box next to Training Related (in the Characteristics box), select yes if the participant received training services and obtained employment directly related to the training services received.	WP	A	DW	Y	NDWG		Vet	<ul style="list-style-type: none"> <li>• UI wage records</li> <li>• Supplemental data sources defined by TEGL 26-16 follow up services</li> <li>• Surveys</li> <li>• Record sharing and/or automated record matching with other employment and administrative databases</li> <li>• Other out-of-state federal wage record systems</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Occupational Code (if available)</b> 1610, 1612, 1613 Services window, Empl Outcomes tab, Outcome Details button, O*Net code	Enter the O*Net code that best describes the participant's employment. This information can be based on any job held after exit from the program.  Additional notes: This information can be based on any job held after exit and only applies to Adults, DWs and Youth who entered employment in the quarter after the exit quarter. If the individual had multiple jobs, use the occupational code for the most recent job held.	WP	A	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>• UI wage records</li> <li>• Supplemental data sources defined by TEGL 26-16 follow up services</li> <li>• Surveys</li> <li>• Record sharing and/or automated record matching with other employment and administrative databases</li> <li>• Other out-of-state federal wage record systems</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Entered Non-traditional Employment</b> 1611 Services window, Empl Outcomes tab	In the drop-down box next to Non-traditional (in the Characteristics box), select yes if the participant's employment is in an occupation or field of work for which individual's of the participant's gender comprise less than 25% of the individuals employed in such occupation or field of work. Non-traditional employment can be based on either local or national data, and both males and females can be in non-traditional employment. This information can be based on any job held after exit and only applies to Adults, DWs and Youth who entered employment in the second quarter after the exit quarter.		A	DW					<ul style="list-style-type: none"> <li>• UI wage records</li> <li>• Supplemental data sources defined by TEGL 26-16 follow up services</li> <li>• Surveys</li> <li>• Record sharing and/or automated record matching with other employment and administrative databases</li> <li>• Other out-of-state federal wage record systems</li> <li>• Case notes</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Industry Code of Employment After Exit</b> 1614, 1615, 1616, 1617 Services, Employment Outcomes tab and Customer Detail, Work History tab	Record the 4 to 6-digit industry code that best describes the participant's employment using the North American Industrial Classification System (NAICS). If more than one NAICS is reported, then the NAICS associated with the highest gross wage should be reported.	WP	A	DW		NDWG		Vet	<ul style="list-style-type: none"> <li>UI Wage Records</li> <li>Supplemental data sources defined by TEGL 26-16 follow up services</li> <li>Surveys</li> <li>Record sharing and/or automated record matching with other federal employment and administrative databases</li> <li>Other out of state federal wage record systems</li> <li>Case notes</li> </ul>	<a href="#">WIOA-Performance-Measures-and-Outcomes-Guide</a>
<b>Retention with the Same Employer (2nd and 4th Quarters)</b> 1618 Services, Employment Outcomes tab	If not collected through UI Wage Information, this information would be pulled from the Employment Outcomes tab. A blank end date indicates retention.	WP	A	DW	Y	NDWG		Vet	Consistent with TEGL 26-16: <ul style="list-style-type: none"> <li>Cross-match with state and out-of-state UI quarterly wage records (intrastate and interstate)</li> <li>Federal government employment records (such as military employment, Dept of Defense, Ofc of Personnel Mgmt., and US Postal Svc)</li> <li>Cross-match with federal administrative wage record databases (such as the Nat'l Directory of New Hires)</li> <li>State new hires registry</li> <li>Signed follow-up survey response from program participants</li> <li>Copy of paycheck stubs, payroll slip, or leave and earnings statements (minimum of 2 per TEGL 26-16)</li> <li>Income tax records, W-2 form, or other records from the state Dept of Revenue or Taxation</li> <li>Railroad Retirement System</li> <li>Quarterly tax payment forms (such as IRS Form 941)</li> <li>Signed letter from an employer on company letterhead (attesting to an individual's employment status and earnings)</li> <li>Self-employment or sales commission worksheets signed and attested to by program participants</li> <li>Cross-match with partner program administrative databases (such as TANF, SNAP or other public assistance programs)</li> </ul>	

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Wages 3rd (2nd, 1st) Quarter Prior to Participation Quarter</b> 1700, 1701, 1702 Customer Detail, Work History	This is generally collected through UI Wage Information, but staff must ensure that the Work History tab has been updated with accurate wage information.	WP	A	DW		NDWG		Vet	Consistent with TEGL 26-16: <ul style="list-style-type: none"> <li>• Cross-match with state and out-of-state UI quarterly wage records (intrastate and interstate)</li> <li>• Federal government employment records (such as military employment, Dept of Defense, Ofc of Personnel Mgmt., and US Postal Svc)</li> <li>• Cross-match with federal administrative wage record databases (such as the Nat'l Directory of New Hires)</li> <li>• State new hires registry</li> <li>• Signed follow-up survey response from program participants</li> <li>• Copy of paycheck stubs, payroll slip, or leave and earnings statements (minimum of 2 per TEGL 26-16)</li> <li>• Income tax records, W-2 form, or other records from the state Dept of Revenue or Taxation</li> <li>• Railroad Retirement System</li> <li>• Quarterly tax payment forms (such as IRS Form 941)</li> <li>• Signed letter from an employer on company letterhead (attesting to an individual's employment status and earnings)</li> <li>• Self-employment or sales commission worksheets signed and attested to by program participants</li> <li>• Cross-match with partner program administrative databases (such as TANF, SNAP or other public assistance programs)</li> </ul>	<a href="#">Creating a Basic Customer Record OSOS Guide</a>

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Wages 1st, 3rd and 4th Quarters after Exit Quarter</b> 1703, 1705, 1706 Services window, Empl Outcomes tab	<p>Customers with an SSN in OSOS will have wages entered administratively by a match with wage record data. Because wage record data is not immediately available, it is important to enter employment outcomes as they occur to ensure positive wage-based outcomes. Entering this information is also pertinent if a customer indicates they are self-employed because self-employment wages are not administratively wage-matched.</p> <p>For customers without an SSN recorded in OSOS, staff must enter manual wages for the participant to count positively in the wage-based outcomes.</p>	WP	A	DW				Vets	<p>Consistent with TEGL 26-16:</p> <ul style="list-style-type: none"> <li>• Cross-match with state and out-of-state UI quarterly wage records (intrastate and interstate)</li> <li>• Federal government employment records (such as military employment, Dept of Defense, Ofc of Personnel Mgmt., and US Postal Svc)</li> <li>• Cross-match with federal administrative wage record databases (such as the Nat'l Directory of New Hires)</li> <li>• State new hires registry</li> <li>• Signed follow-up survey response from program participants</li> <li>• Copy of paycheck stubs, payroll slip, or leave and earnings statements (minimum of 2 per TEGL 26-16)</li> <li>• Income tax records, W-2 form, or other records from the state Dept of Revenue or Taxation</li> <li>• Railroad Retirement System</li> <li>• Quarterly tax payment forms (such as IRS Form 941)</li> <li>• Signed letter from an employer on company letterhead (attesting to an individual's employment status and earnings)</li> <li>• Self-employment or sales commission worksheets signed and attested to by program participants</li> <li>• Cross-match with partner program administrative databases (such as TANF, SNAP or other public assistance programs)</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>

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		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Wages 2nd Quarter after Exit Quarter</b> 1704 Services window, Empl Outcomes tab	Customers with an SSN in OSOS will have wages entered administratively by a match with wage record data. Because wage record data is not immediately available, it is important to enter employment outcomes as they occur to ensure positive wage-based outcomes. Entering this information is also pertinent if a customer indicates they are self-employed because self-employment wages are not administratively wage-matched. For customers without an SSN recorded in OSOS, staff must enter manual wages for the participant to count positively in the wage-based outcomes.	WP	A	DW	Y	NDWG	TAA	Vets	<ul style="list-style-type: none"> <li>• UI wage data match/administrative wage match such as the National Directory of New Hires</li> <li>• Follow-up survey from program participants</li> <li>• Paycheck stubs, tax records, W-2 form</li> <li>• Quarterly tax payment forms (such as IRS Form 941)</li> <li>• Document from employer on company letterhead attesting to an individual's employment status and earnings</li> <li>• Self-employment worksheets signed and attested to by program participants</li> <li>• Detailed case notes verified by employer and signed by the counselor</li> </ul>	
<b>Type of Recognized Credential</b> 1800, 1802, 1804 Services window, Trng Outcomes tab, Type	Record the type of recognized diploma, degree, or a credential consisting of an industry-recognized certificate or certification, a certificate of completion of a Registered Apprenticeship, a license recognized by the State involved or Federal Government, or an associate or baccalaureate degree attained by the participant who received education or training services. Complete the remaining required fields on the Trng Outcomes tab.  NOTE: Diplomas, degrees, licenses or certificates must be attained either during participation or within one (1) year of exit. This data element applies to both the Credential Rate indicator and the Measurable Skills Gain indicator for all programs.	WP	A	DW	Y	NDWG	TAA	Vet	<ul style="list-style-type: none"> <li>• Cross match</li> <li>• Case notes documenting information obtained from education or training provider</li> <li>• Follow-up survey from program participants</li> <li>• Copy of credential</li> <li>• Copy of school record</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Date Attained Recognized Credential</b> 1801, 1803, 1805 Services window, Trng Outcomes tab, Completion Date	Record the date on which the participant attained a recognized credential. Select the appropriate Attainment status from the drop-down list.	WP	A	DW	Y	NDWG	TAA	Vet	<ul style="list-style-type: none"> <li>• Cross match</li> <li>• Case notes documenting information obtained from education or training provider</li> <li>• Follow-up survey from program participants</li> <li>• Copy of credential</li> <li>• Copy of school record</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Date of Measurable Skills Gain (MSG) - Educational Functioning Level (EFL)</b> 1806 Services window, Trng Outcomes tab, Add Outcome button	Record the most recent date the participant who received instruction below the postsecondary education level achieved at least one (1) EFL. EFL gain may be documented in one of three ways: 1) by comparing a participant's initial EFL as measured by a pre-test with the participant's EFL as measured by a participant's post-test; or 2) for States that offer secondary school programs that lead to a secondary school diploma or its recognized equivalent, an EFL gain may be measured through the awarding of credits or Carnegie units; or 3) States may report an EFL gain for participants who exit the program and enroll in postsecondary education or training during the program year.		A	DW	Y	NDWG			<ul style="list-style-type: none"> <li>Pre- and post-test results measuring EFL gain</li> <li>Adult High School transcript showing EFL gain through the awarding of credits or Carnegie units</li> <li>Postsecondary education or training enrollment determined through data match, survey documentation, or program notes</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Date of Most Recent Measurable Skills Gain (MSG) Postsecondary Transcript/Report Card</b> 1807 Services window, Trng Outcomes tab, Add Outcome button	Record the most recent date of the participant's transcript or report card for postsecondary education who complete a minimum of 12 hours per semester, or for part time students a total of at least 12 credit hours over the course of two completed semesters during the same 12 month period, that shows a participant is meeting the State unit's academic standards.		A	DW	Y	NDWG			<ul style="list-style-type: none"> <li>Transcript</li> <li>Report card</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Date of Most Recent Measurable Skills Gain (MSG) Secondary Transcript or Report Card</b> 1808 Services window, Trng Outcomes tab, Add Outcome button	Record the most recent date of the participant's transcript or report card for secondary education for one semester that shows a participant is meeting the State unit's academic standards.		A	DW	Y	NDWG			<ul style="list-style-type: none"> <li>Transcript</li> <li>Report card</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Date of Most Recent Measurable Skills Gain (MSG) Training Milestone</b> 1809 Services window, Empl or Trng Outcomes tab, Add Outcome button	Record the most recent date that the participant had a satisfactory or better progress report towards established milestones from an employer/training provider who is providing training (e.g., completion of on-the-job training (OJT), completion of one year of a Registered Apprenticeship program, etc.). If the skill gain relates to an OJT, it must be recorded in the Trng Outcomes tab. If the skill gain relates to an apprenticeship, it must be entered in the Empl Outcomes tab.		A	DW	Y	NDWG			<ul style="list-style-type: none"> <li>Documentation of a skill gained through OJT or Registered Apprenticeship</li> <li>Contract and/or evaluation from employer or training provider documenting a skill gain</li> <li>Progress report from employer documenting a skill gain</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>



Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Date of Most Recent Measurable Skills Gain (MSG) Skills Progression</b> 1810 Services window, Empl or Trng Outcomes tab, Add Outcome button	Record the most recent date the participant successfully completed an exam that is required for a particular occupation, or progress in attaining technical or occupational skills as evidenced by trade-related benchmarks such as knowledge-based exams.		A	DW	Y	NDWG			<ul style="list-style-type: none"> <li>Results of knowledge-based exam or certification of completion</li> <li>Documentation demonstrating progress in attaining technical or occupational skills through an exam or benchmark attainment</li> <li>Documentation from training provider or employer</li> <li>Copy of a credential that is required for a particular occupation and only is earned after the passage of an exam</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Date Enrolled During Program Participation in an Education or Training Program Leading to a Recognized Postsecondary Credential or Employment</b> 1811 Services window, Trng Outcomes tab	Enter training details on the Trng Outcomes tab for participants who were enrolled during program participation in an education or training program that leads to a recognized postsecondary credential, including a secondary education program, or training program that leads to employment as defined by the core program in which the participant participates. This can include participants who were already enrolled in education or training at the time of program entry or became enrolled in education or training at any point while participating in the program. If the participant was enrolled in postsecondary education at program entry, the date in this field should be the date of program entry. This includes, but is not limited to, participation in Job Corps or YouthBuild or Adult Education or secondary education programs.  Note: This data element applies to the Measurable Skills Gain (MSG) indicator, and specifically will be utilized to calculate the denominator. It encompasses all education and training program enrollment.		A	DW	Y	NDWG			<ul style="list-style-type: none"> <li>Copy of enrollment record</li> <li>School records</li> <li>Transcript or report card</li> <li>Cross match</li> <li>Case notes</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Date Completed, During Program Participation, an Education or Training Program Leading to a Recognized Postsecondary Credential or Employment</b> 1813 Services window, Empl or Trng Outcomes tab	Enter the date the participant completes, during program participation, an education or training program that leads to a recognized postsecondary credential, including a secondary education program, or training program that leads to employment as defined by the core program in which the participant participates. This can include participants who were either already enrolled in education or training at any point while participating in the program. If the participant was enrolled in postsecondary education at program entry, the date in this field should be after the date of program entry. This includes, but is not limited to, participants in Job Corps, YouthBuild, a Registered Apprenticeship program, Adult Education or secondary education programs.  Note: This data element applies to the Measurable Skills Gain (MSG) indicator, and specifically will be utilized to calculate the denominator. It encompasses all education and training program enrollment.		A	DW	Y	NDWG			<ul style="list-style-type: none"> <li>Cross-match</li> <li>Copy of diploma, credential or degree awarded by educational institution</li> <li>Applicable records from education institution (GED certificate, diploma, transcripts, report card, or school documentation)</li> <li>Signed file documentation with information obtained from education or training provider</li> <li>Case notes</li> <li>Self-Attestation</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Youth 2nd &amp; 4th Quarter Placement</b> (Occupational Skills Training) 1900, 1901 Services window, Trng Outcomes tab and Services tab	Participation in Occupational Skills Training must be documented in the Services tab and the Training Outcomes tab.				Y				<ul style="list-style-type: none"> <li>Cross-match</li> <li>Copy of registration record</li> <li>School records</li> <li>Transcript or report card</li> <li>Vendor/training provider training documentation</li> <li>Case notes</li> </ul>	<a href="#">Youth Service Types and Outcomes: Changes in OSOS</a>

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (VSG)		
<b>Date of Completion of NDWG Services</b> 2001 Services window, services tab, Detail box, Actual End Date	Record the date the participant received their last service in the NDWG program.					NDWG			<ul style="list-style-type: none"> <li>Cross-match between State MIS database and attendance sheets or records</li> <li>Vendor training records with follow-up cross-match to State MIS database</li> <li>Case notes with follow-up cross-match to State MIS database</li> </ul>	
<b>Employed at Completion of NDWG Services</b> 2002 Services window, Empl Outcomes tab	Complete at least the required fields on the Empl Outcomes tab if the participant is employed at completion of participation in services under an NDW Grant (NDWG).					NDWG			<ul style="list-style-type: none"> <li>UI wage data match/administrative wage match, such as the National Directory of New Hires</li> <li>Follow-up survey from program participants</li> <li>Detailed case notes verified by employer and signed by the counselor</li> <li>Pay check stubs, tax records, W2 form</li> <li>Quarterly tax payment forms, such as IRS form 941</li> <li>Signed document from employer on company letterhead attesting to an individual's employment status and earnings</li> <li>Self-employment worksheets signed and attested to by program participants</li> </ul>	<a href="#">WIOA Primary Indicators of Performance and Outcomes OSOS Guide</a>
<b>Received Services through a Disaster Recovery Dislocated Worker Grant</b> 2004 Services window, Services tab	Indicate (1) if the participant received disaster relief employment only under a Disaster Recovery DWG, and received no other services under a Disaster Recovery DWG; (2) if the participant received disaster relief employment and received Employment and Training services (Career and Training services) under a Disaster Recovery DWG; or (3) if the participant received Employment and Training services (Career and Training services) only under a Disaster DWG, and did not receive disaster relief employment under a Disaster Recovery DWG.					NDWG			<ul style="list-style-type: none"> <li>UI wage data match/administrative wage match, such as the National Directory of New Hires</li> <li>Follow-up survey from program participants</li> <li>Pay check stubs, tax records, W2 form</li> <li>Quarterly tax payment forms, such as a IRS form 941</li> <li>Signed document from employer on company letterhead attesting to an individual's employment status and earnings</li> <li>Self-employment worksheets signed and attested to by program participants</li> <li>Detailed case notes verified by employer and signed by the counselor</li> <li>State MIS database</li> <li>Grantee Electronic MIS Records</li> </ul>	See OSOS Guides <a href="#">webpage</a> for program-specific guides.

Data Element Name, Number, Location in OSOS	Data Element Definitions/Instructions	Requirements by Program							Allowable Data Verification Sources (Must have one of the items from this column if claiming the data element in OSOS)	Reference
		Wagner-Peyser	WIOA Adult	WIOA Dislocated Worker (DW)	WIOA Youth	Nat'l DW Grants	TAA	Vets (JVSG)		
<b>Social Security Number (SSN)</b> 2700 Customer Detail, Gen Info tab	<p>Verify and record Social Security Number (SSN) for NDWG and JVSG participants. NDWG and JVSG participants who have already had their SSN verified through the UI system do not need to produce additional source documentation. If SSN is not verified in the UI system, a copy of the allowable proof must be produced by the NDWG and JVSG participant but not retained.</p> <p>For all other program participants, while not required, recording of SSN is strongly recommended to support employment performance outcomes and reduce duplicate accounts. Source documentation is not required to be produced by the participant or retained for these other program participants.</p>					NDWG		Vet	<ul style="list-style-type: none"> <li>Social Security card</li> <li>Other federal or state ID with SSN</li> </ul>	<a href="#">Creating a Basic Customer Record OSOS Guide</a>

## Types of Source Documentation

For most data elements, the validation guidelines provide multiple forms of acceptable source documentation. If multiple sources conflict, the most authoritative source should be used to determine if the data element is valid and accurate. Comments should be added to a customer record for each interaction you have with a customer. You will find it helpful to record good comments in the appropriate Management Information System (MIS) for tracking a customer's progress at each point in their employment services process. Since multiple agencies and staff members may be working with the same customer, it is essential to write thoughtful case notes that provide a thorough and objective overview of the customer that everyone can reference and utilize. Comments should follow the SENSE guidelines provided on the NYSDOL website.

**Case notes** refers to either paper or electronic statements by staff that identify, at a minimum, the following: (1) the participant's status for a specific data element; (2) the date on which the information was obtained; and (3) the name of the staff who obtained the information.

When case notes is the source documentation method used, a copy of the source document does not have to be retained.

When case notes is used in the One-Stop Operating System (OSOS), the statement is entered on the Comments tab of the Customer Detail window. The staff's name and the date appear automatically when a comment is entered. If the date the information was obtained is not the date the comment is entered, the date the information was obtained must be stated in the comment. When case notes is used in a file, the statement must include all three components listed above.

Example of a case notes OSOS comment: *Youth disclosed she is pregnant.*

Example of a case notes OSOS comment when the information was obtained on a different day than when the comment was entered in OSOS: *Youth disclosed on 10/28/22 that she is pregnant.*

Example of a case notes comment in a file: *Youth disclosed on 10/28/22 that she is pregnant. (staff name).*

When a case notes comment is entered in a file, a comment must also be entered in OSOS indicating the existence of the notation. For example: See physical file for pregnancy DEV.

A **cross-match** requires staff to identify detailed evidence that confirms the data element in a secondary database. Staff must also confirm supporting information such as dates of participation and services rendered. An example of cross-match is verifying Date of Birth (DOB) through the Department of Motor Vehicles (DMV).

A **cross-match to State MIS database** refers to information stored in a State database (such as OSOS) that supports an element. An example is Unemployment Compensation (Unemployment Insurance) eligibility.

**Electronic records** may include (1) participant source documents maintained in a State MIS (such as OSOS) and (2) participant information entered into a State MIS regarding the specific services received by a participant. When electronic records is the verification source for services provided, the MIS must contain specific, detailed information that supports the provision of the service. For example, electronic records is an acceptable source documentation for the date the Individualized Employment Plan (IEP) was created. To be an acceptable source to validate the date of the IEP, in addition to the date of the service, the database must have detailed information about the IEP. An indicator, such as a checkmark on a computer screen, is not acceptable source documentation in and of itself.

**Self-attestation** is a statement written or affirmed by the participant that includes (1) the participant's status; (2) the participant's signature; and (3) the date. The self-attestation can be written or electronic/digital. Per TEGl 23-19, Change 1, "Electronic signatures or a submission from the participant such as an email, text, or unique online survey response is considered an electronic signature or verification; it must be participant generated and traceable to the participant." Intake and enrollment forms that are signed and dated can also be considered self-attestation.

When self-attestation is the source documentation method used, a copy of the source document **must be retained**.

Self-attestation should only be used when other verification methods are not practicable. However, when self-attestation is allowed, the lack of other source documentation beyond self-attestation must not delay or prevent enrollment or the provision of services.

**Survey/Signed Survey** is the collection of information from a participant regarding outcomes along with a traditional or electronic signature. When survey is the source documentation method used, a copy of the source document **must be retained**. The survey must contain all the necessary information to accurately document outcomes in State MIS.