Participant Name: OSOS ID:County/Contractor

Enrollment Date:  Exit Date:  Name of Reviewer:

|  |
| --- |
| **SECTION I Determine Participant Status****Participants must be eligible for Workforce Innovation and Opportunities Act (WIOA) Individualized or Training services; or WIOA eligible youth. The data entry requirements for participants are outlined in the** [**Disability Employment Initiative (DEI) Round 8 OSOS Guide**](https://labor.ny.gov/workforcenypartners/osos/DEI-Round-8-OSOS-Guide.pdf) **and the** [**Provider Search and Documenting Services to Youth Program Customers**](https://labor.ny.gov/workforcenypartners/osos/Provider-Search-and-Documenting-Services-to-Youth-Program-Customers.pdf) **guide.** |

**WIOA Adult DEI 8 Participants**

| **Data Element** | **Per OSOS** | **Comments / Documentation** |
| --- | --- | --- |
| Date of birth | *Enter DOB as shown in OSOS* |  |
| Age at enrollment | *Determine age and enter here* |  |
| Selective Service[[1]](#footnote-1) (males 18+) | [ ]  Yes [ ]  No [ ]  N/A |  |
| Disability Status – Eligibility tab | *Enter the status from the OSOS data field* |  |
| Disability Category – Eligibility tab | *Enter the status from the OSOS data field* |  |
| Service Disability (must be a Veteran) | *Customer Detail Window>Add’l Info tab>Military Service data Enter Veteran AND Service Disability status* | *Verify Veteran AND Service Disability status* |

**1. Is the individual eligible for the DEI 8 grant?** [ ]  Yes [ ]  No

Individual is age 14 to 24 with a disability (as defined under Section 3 of WIOA) and in compliance with selective service registration requirements (if applicable).

**2. Is the individual an eligible WIOA Adult who has been determined to need individualized or training services?**

[ ]  Yes [ ]  No

An individual eligible for the WIOA Adult program is at least 18 years old and in compliance with selective service registration requirements (if applicable).

**WIOA Youth DEI 8 Participants**

**1. School Status as defined by State Law at time of enrollment**

**OSY** **-** At the time of enrollment youth is age 16 to 24 and school status must be one of the following:

[ ]  Not attending school or Secondary School Dropout [ ]  Not attending school; secondary school graduate/equivalent

[ ]  Not attending school; within compulsory age

Documentation

* If individual is determined to be age 16 to 24 and OSY go to Question 2; if not, go to ISY section below:

**ISY -** At the time of enrollment youth age 14 to 21 and school status must be one of the following:

[ ]  In-School, Secondary School or less (K-12 schools) [ ]  In-School, Post-Secondary School

[ ]  In-School, Alternative School

Documentation

* If individual is determined to be age 14 to 21 and ISY go to Question 3

**2. OSY Barriers/Low Income - At the time of enrollment youth must be age 16-24 not attending school and facing one or more of the following barriers, check each barrier reported in OSOS.**

[ ]  1. High School Dropout

[ ]  2. Within the age of compulsory school attendance but has not attended school for at least the most recent school calendar quarter

[ ]  3. Pregnant or parenting, including non-custodial parents

[ ]  4. Individual with a Disability

[ ]  5. Offender

[ ]  6. Homeless or a runaway

[ ]  7. An individual in foster care or who has aged out of the foster care system or who has attained 16 years of age and left foster care for kinship guardianship or adoption, a child eligible for assistance under sec. 477 of the Social Security Act (42 U.S.C. 677), or in an out-of-home placement.

[ ]  8. Low-Income and is a recipient of a high school diploma or its equivalent, and is basic skills deficient

[ ]  9. Low-Income and is a recipient of a high school diploma or its equivalent, and is an English language learner

[ ]  10. Low-Income and needs additional assistance to enter or complete an educational program or to secure or hold employment, as determined by the Local Workforce Development Board (LWDB)

Documentation

**OSY eligibility based on barriers 8, 9, or 10 must be low income** (or enrolled under PY 5% low income exception)

Enter Low Income Category (see guide definitions section) Reported (if required)

Documentation

**Is the youth eligible to be served as an OSY?** [ ]  Yes [ ]  No

**3. ISY Low Income/Barrier Status - At the time of enrollment youth must be age 14-21 not attending school and facing one or more of the following barriers, check each barrier reported in OSOS.**

[ ]  1. Pregnant or parenting, including non-custodial parents

[ ]  2. Individual with a Disability

[ ]  3. Offender

[ ]  4. Homeless or a runaway

[ ]  5. An individual in foster care or who has aged out of the foster care system or who has attained 16 years of age and left foster care for kinship guardianship or adoption, a child eligible for assistance under sec. 477 of the Social Security Act (42 U.S.C. 677), or in an out-of-home placement.

[ ]  6. Basic skills deficient

[ ]  7. English language learner

[ ]  8. Needs additional assistance to complete an educational program or to secure and hold employment as determined by the LWDB

Documentation

**All ISY must be low-income** (or be enrolled under the program year low income 5% exception)

Enter Low Income Category (see guide definition section)

Documentation

**Is the youth eligible to be served as an ISY?** [ ]  Yes [ ]  No

|  |
| --- |
| **SECTION II Work History Tab – The data fields in this section need to be reviewed for all jobs listed on the Work History tab. Reviewer needs to verify that the information is complete.** |
| **Data Element** | **YES/NO** | **Comment** |
| Job Title (O\*Net Code) |  |  |
| Start Date |  |  |
| End Date (if a job has ended this must be completed for all entries)  |  |  |
| Hourly Wage (wage unit must be set to hourly) |  |  |
| Hours per Week  |  |  |
| Reason for Leaving (status is “still employed” if currently working) |  |  |

|  |
| --- |
| **SECTION III DEI 8 Tab – Customer Detail Window** |

**1. Enrolled in Career Pathways?** [ ]  Yes [ ]  No If Yes, enter date

**2. If enrolled in Career Pathway is a “DEI Supplemental” funded training service entered in OSOS?**[ ]  Yes [ ]  No [ ]  N/A

NOTE: DEI 8 participants who are reported as enrolled in a Career Pathway must have a training service recorded and funded with “DEI Supplemental” funds.

**3. Service Delivery Strategies – Identify and determine if strategies are consistent with DRC monthly report and other information in the record (e.g., comments).**

|  |  |  |
| --- | --- | --- |
| **Data Field** | **Yes / No** | **Comments** |
| Integrated Resource Teams (IRTs) |  |  |
| Blending and Braiding of Funds  |  |  |
| Work-Based Experience, Apprenticeships, or Internships |  |  |
| Asset Development  |  |  |
| Case Management or Wraparound Services |  |  |
| Customized Employment and Discovery  |  |  |
| Benefits Planning |  |  |
| Individualized Learning Plan |  |  |

**4. Disability Categories – Identify the categories reported and cross check for consistency with Section I above**

[ ]  Attention Deficit/Hyperactivity Disorders [ ]  Blindness/Low Vision [ ]  Traumatic Brain Injury

[ ]  Deaf/Hard of Hearing [ ]  Learning Disabilities [ ]  Medical Disabilities

[ ]  Physical Disabilities [ ]  Mental Health Disabilities [ ]  Speech and Language Disabilities

[ ]  Developmental Disabilities

Comments:

**5. ACCES-VR, DDDI, SSI and Ticket to Work Status – Identify status and assess for consistency of information in the participant record, DRC monthly reports and any reports generated by NYSDOL**

|  |  |  |
| --- | --- | --- |
| **Data Field** | **Yes / No** | **Comments** |
| Referred **from** Access-VR |  |  |
| Referred **to** Access-VR |  |  |
| Currently receiving Social Security Disability Insurance (SSDI)? If no, has participant ever received SSDI? |  |  |
|  |  |
| Currently receiving Supplemental Security Income (SSI)? If no, has participant ever received SSI? |  |  |
|  |  |
| Currently a ticket to work participant? |  |  |
| Ticket assigned to the Career Center Employment Network? |  |  |

**6. Training or Information in Asset Development - Identify status and assess for consistency of information in the participant record, DRC monthly reports and any reports generated by NYSDOL**

|  |  |  |
| --- | --- | --- |
| **Data Field** | **Yes / No** | **Comments** |
| Beneficial Tax Provisions |  |  |
| Individual Development Accounts |  |  |
| Social Security Disability Benefits & Employment Supports |  |  |
| Referral to Benefits Advisor outside the Career Center |  |  |
| Managing Money & Credit |  |  |
| Self-Employment |  |  |
| Home Ownership |  |  |
| Other |  |  |

|  |
| --- |
| **SECTION IV Services Data Entry – All Training, Supportive and Needs-related payment services must follow local policies. Training programs must be on the NYSDOL ETPL, except for OJT. Services must be completed by September 30, 2020, or the end date of the grant period. Refer to the** [**Disability Employment Initiative (DEI) Round 8 OSOS Guide**](https://labor.ny.gov/workforcenypartners/osos/DEI-Round-8-OSOS-Guide.pdf) **and the** [**Provider Search and Documenting Services to Youth Program Customers**](https://labor.ny.gov/workforcenypartners/osos/Provider-Search-and-Documenting-Services-to-Youth-Program-Customers.pdf) **guide for OSOS data entry guidance.** * **When entering services funded ONLY with DEI funds, staff must not select services identified for WIOA Youth. These services are indicated with the word (Youth) in parentheses or the word element at the end of the service name.**
* **OSOS will not allow the training service to be dual funded with DEI and WIOA Youth Local funding.** **This is a system limitation. When a training service is paid for with both WIOA Youth funds and DEI funds, the service is entered in OSOS as an Occupational Skills Training and the Program Service Type is ITA-Training. In the “Program” dropdown, “DEI Round 8 and WIOA Youth Funding” must be selected. This will allow the system to document that the participant’s training service is being funded with both WIOA Youth and DEI Round 8 funds.**
* **WIOA Youth eligible customers should receive the necessary design framework and initial youth element services needed to create a Youth enrollment, followed by the DEI funded service.**
* **Services may be funded entirely by the DEI program with DEI Supplemental and the number “1.00” being entered as the service funding in OSOS. DEI services may also be split funded with WIOA Local Adult or DW program funding. For split funded services both the DEI Supplemental funding and WIOA Local Adult or DW funding are entered with the number "0.50" entered in the Obligated Amount of each funding source.**
 |
| If ITA training was provided, was it an ETPL service? |  |
| If ITA-training was provided does the training adhere to local policy? |  |
| Is the correct “program service type” entered for each service provided? |  |
| Is training in a demand occupation? |  |
| Is O\*Net code entered for training services? |  |
| For any DEI services that have ended is the “completed successfully” and “end date” data entered and accurate? |  |
| Review the record to determine is any services were provided by the DEI grant and WIOA Youth Local program funding.If yes, in OSOS is the service “Program” dropdown set to “DEI Round 8 and WIOA Youth Funding”? | *If yes, note any discrepancies. Provide a detailed list of any discrepancies and discuss with the provider. Direct the provider to contact and work with the OSOS help desk to make corrections, assist as needed. If there appears to be a systemic problem, direct provider to review all records with services provided by the DEI grant and WIOA Local Youth funding.* |
| Are all services provided under the DEI program funded with ‘DEI Supplemental’ and with $1.00 or .50 if split funded with WIOA Adult or DW program?  |  |

|  |
| --- |
| **SECTION V Additional Data** |
| **Data** | **In OSOS** | **Comments / Documentation** |
| **Yes** | **No** | **N/A** |
| Employment Status at Enrollment |  |  |  |  |
| Other reason for Exit |  |  |  |  |
| Email Address |  |  |  | *Does the individual have an email address entered in the OSOS email data field enter YES or NO* |

|  |
| --- |
| **SECTION VI Program Outcomes** [WIOA Primary Indicators of Performance and Outcomes OSOS Guide](https://labor.ny.gov/workforcenypartners/osos/WIOA-Performance-Measures-and-Outcomes-Guide.pdf) |
| **Criteria** | **In OSOS****YES/NO** | **Comment/Documentation** |
| Did the participant achieve a measurable skill gain (MSG*)? If MSG relates to an OJT, it must be recorded in the Training Outcomes tab.*  *If MSG relates to an apprenticeship, it must be entered in the Employment Outcomes tab.* |  | *If yes, verify MSG is complete and entered in the appropriate training or employment outcomes tab.* |
| Did the participant receive a recognized postsecondary credential or a secondary school diploma, or recognized HS equivalent? |  | *If yes, enter credential type & date attained; verify that credential earned is entered in the Training Outcomes Tab* |
| Is the participant in unsubsidized employment, military, registered apprenticeship, post-secondary education/training in 2nd quarter after exit?If yes, is the Work History and Employment Outcomes tabs, including employment outcome detail updated? |  | *Complete Work History data entry with hours per week, hourly wage unit, FT/PT, O\*Net, and job title.* |
| Is the participant in unsubsidized employment, military, registered apprenticeship, post-secondary education/training in 4th quarter after exit? |  |  |

1. If a youth turns 18 while in the WIOA youth program, the youth provider must ensure that the youth is registered in Selective Service to continue to receive WIOA services; refer to TA12-9.1. [↑](#footnote-ref-1)