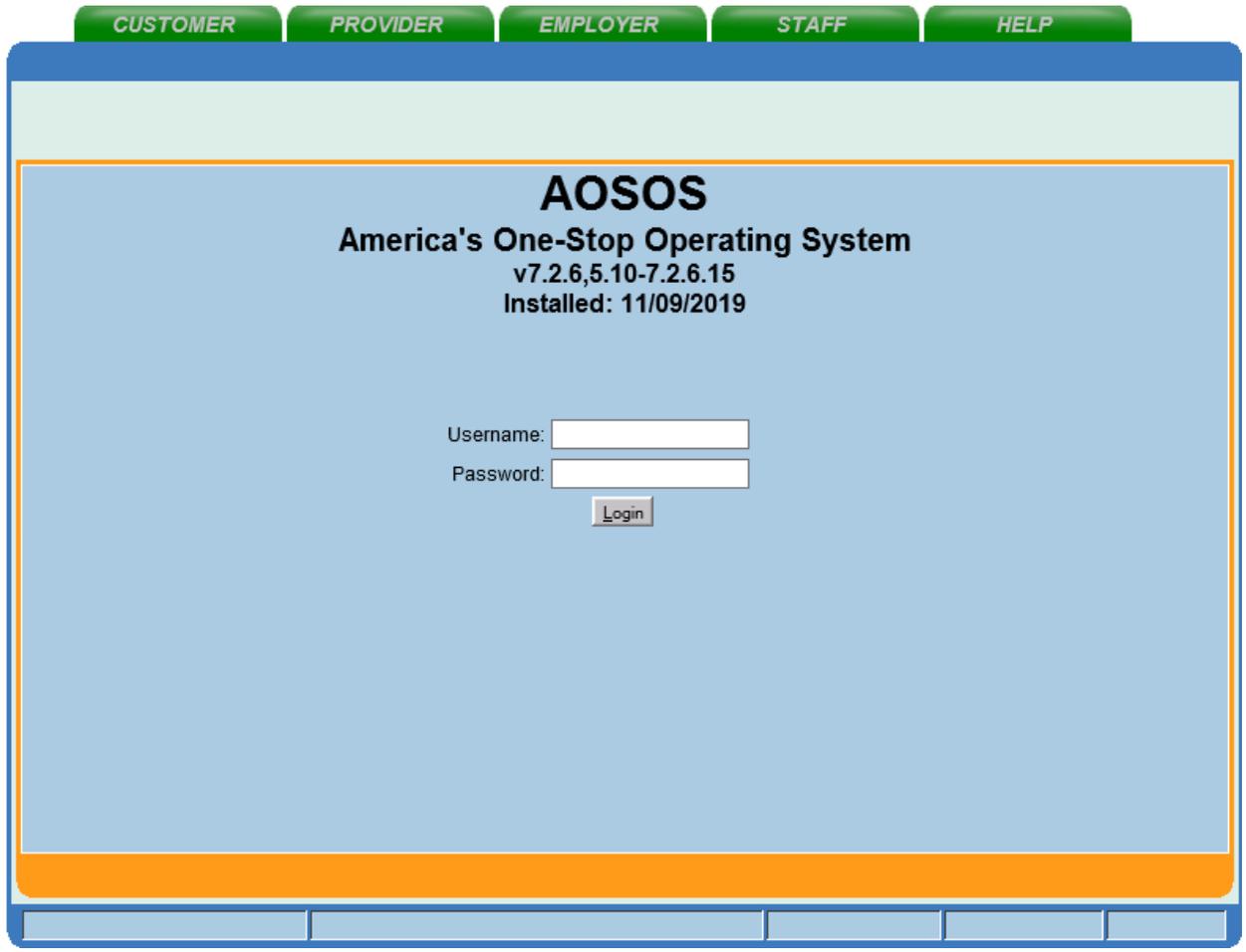


# OSOS Data Entry Guide:

## Employment Recovery National Dislocated Worker Grant (ER-NDWG)



The screenshot shows the OSOS login page. At the top, there are five green navigation buttons: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these is a light blue header area. The main content area is a light blue box with an orange border. Inside this box, the text reads: **AOSOS**, America's One-Stop Operating System, v7.2.6,5.10-7.2.6.15, and Installed: 11/09/2019. Below this text are two input fields: Username: [ ] and Password: [ ]. A Login button is positioned below the password field. At the bottom of the page, there is a blue footer bar with several empty rectangular slots.



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## PURPOSE

The purpose of the Employment Recovery – National Dislocated Worker Grant (ER-NDWG) is to provide occupational training and career services to eligible participants who have been affected by COVID-19. Allowable program activities under the ER-NDWG include career services, training services, supportive services, and needs-related payments. Eligible participants include:

- Dislocated Workers as defined in Section 3(15) of the Workforce Innovation and Opportunities Act (WIOA)
- Workers laid-off as a result of a disaster, including:
  - o workers who are laid off as a result of a quarantine, because they miss work to care for a family member, or because they cannot come to their regular workplace in order to follow social distance requirements; and
  - o workers laid off after a business closure related to disruptions caused by a disaster and the efforts to contain it
- Self-employed individuals unemployed or underemployed because of a disaster
- Long-term unemployed individuals

These services, along with work-based training opportunities, will empower participants to re-enter to the workforce.

OSOS is a case management system designed to document services provided to jobseekers and businesses. Information entered must detail an assessment of a customer's situation as it pertains to their search for employment. It must then detail a specific plan of action set in place to provide these services and achieve defined goals. Lastly, the outcome of this plan must be documented in order to measure success in achieving the desired goals.

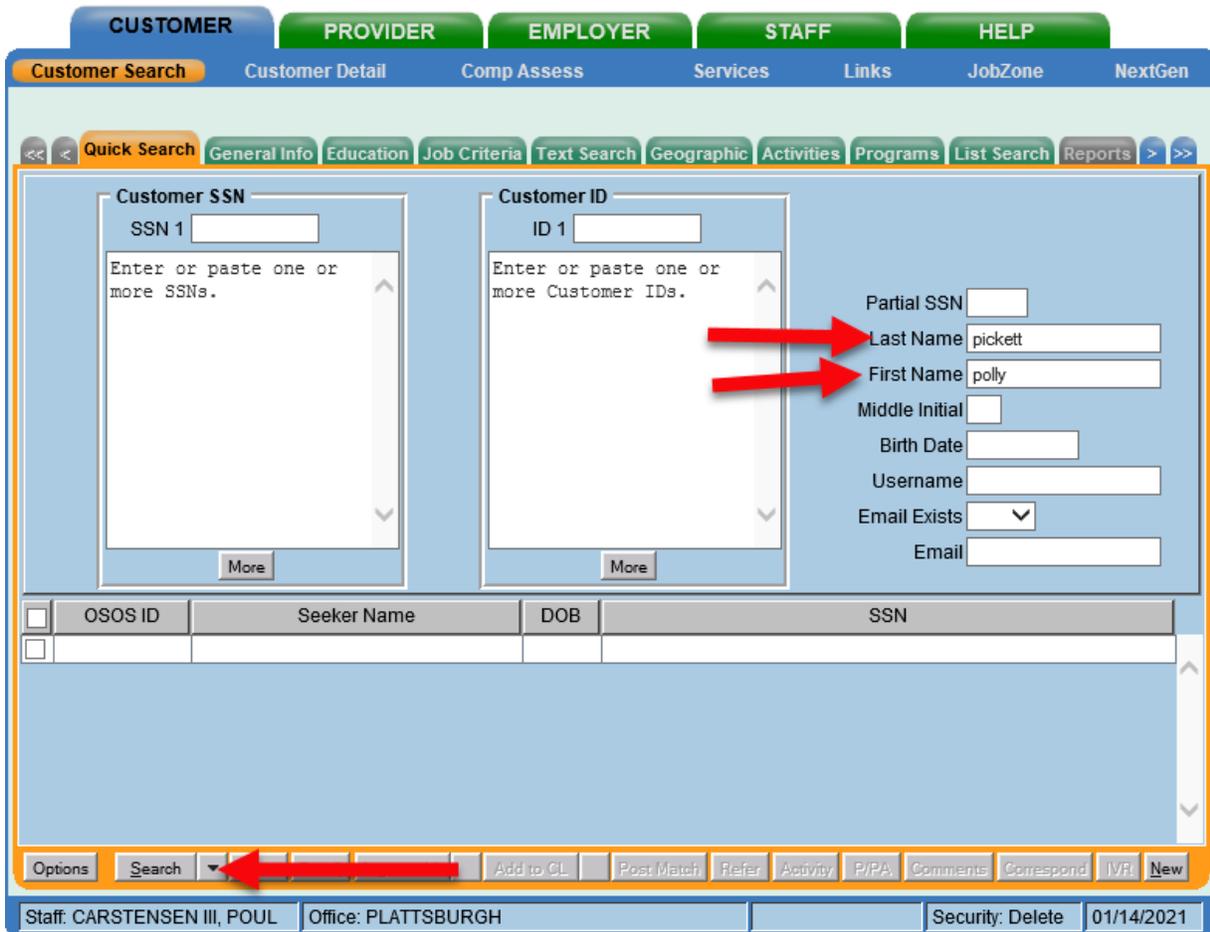
This guide will provide detailed instructions for completing the OSOS data entry necessary for the ER-NDWG. If you are a new OSOS user, please see the guide on [Accessing the System](#) for information regarding setting up an account, following confidentiality procedures, and performing the appropriate system setup.

## PARTICIPANT DATA ENTRY

Search for the customer by **Last Name** and **First Name**. Once you find the customer's record in OSOS, you can use the customer's NYID number for any subsequent customer search. If no matches are found, you will need to create a new customer record in OSOS. Please see the [Creating a Basic Customer Record OSOS Guide](#) for detailed instructions for creating the customer record.



*If a name search returns multiple records for the same customer, contact the OSOS help desk at [help.osos@labor.ny.gov](mailto:help.osos@labor.ny.gov) or 518-457-6586 to determine which record should be used.*

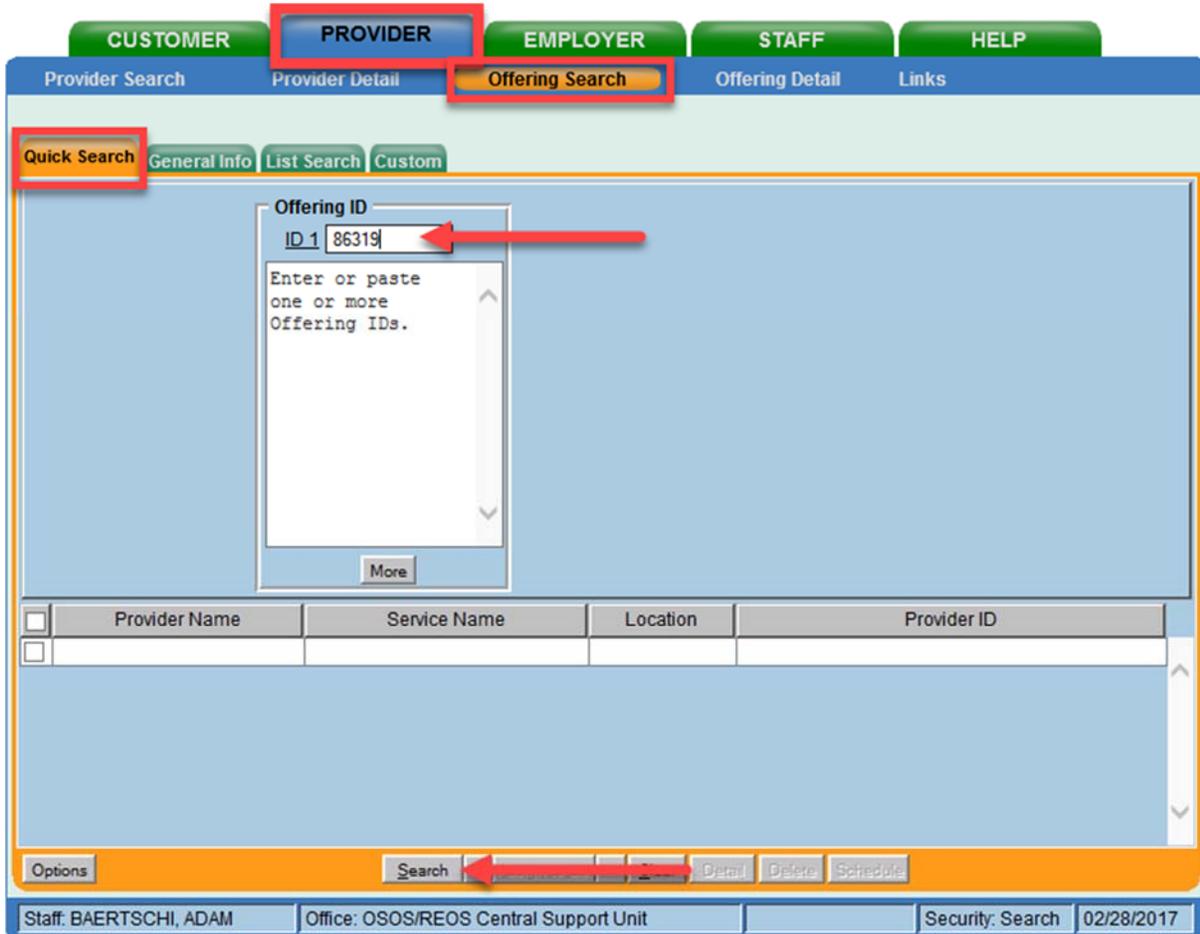


The screenshot displays the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, JobZone, and NextGen. The main search area includes a 'Quick Search' section with tabs for General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, and Reports. The search criteria section has two large text areas for 'Customer SSN' and 'Customer ID', each with a 'More' button. To the right, there are fields for 'Partial SSN', 'Last Name' (pickett), 'First Name' (polly), 'Middle Initial', 'Birth Date', 'Username', 'Email Exists' (dropdown), and 'Email'. Below this is a table with columns for OSOS ID, Seeker Name, DOB, and SSN. At the bottom, there is a toolbar with buttons for Options, Search, Add to CL, Post Match, Refer, Activity, PIPA, Comments, Correspond, IVR, and New. A red arrow points to the 'Search' button. The footer shows 'Staff: CARSTENSEN III, POUL', 'Office: PLATTSBURGH', 'Security: Delete', and '01/14/2021'.

Navigate to the **Services** window, **Services** tab of the customer record. Click on the **New Service** button at the bottom of the screen.

The screenshot shows the OSOS interface for a customer record. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are navigation links: Customer Search, Customer Detail, Comp Assess, Services (highlighted with a red arrow), and NextGen. The customer information displayed is Pickett, Polly, with SSN: \*\*\*-\*\*-8888 and OSOS ID: NY012312655. A 'Record Saved' message is visible. Below the navigation links are tabs for Achievement Objectives, Services (highlighted with a red arrow), Enrollments, Outcomes, Empl. Outcomes, Trng. Outcomes, and Comments. The main content area is divided into two sections: 'Detail' and 'Funding'. The 'Detail' section contains various input fields for service information, including Service Name, Service Desc., Service ID, Service Type, Provider Name, Location Name, Provider ID, Offering ID, Plan. Start Date, Plan. End Date, Actual Start Date, Actual End Date, Completed Successfully, Next Contact Date, Program Service Type, Part Time Learn., and Distance Learn. The 'Funding' section contains a table with columns Level, Source, Obligated, Actual, and Oblig #, and several input fields for Total Funding, Petition #, RR Event #, and Incumbent Worker Training. At the bottom of the screen, there is a row of buttons: Options, Print List, New Service (highlighted with a red arrow), Authorization, IPA Service Summary, Payments, and Tracking. Below this row are buttons for Save, Customer Detail, Comp Assess, Comments, and Check Labor Market Information. The footer of the screen displays Staff: CARSTENSEN III, POUL, Office: PLATTSBURGH, Security: Delete, and the date 01/14/2021.

After clicking on the **New Service** button, OSOS will automatically navigate to the **Provider** module. Within this module, OSOS will start in the **Offering Search** window and the **Quick Search** tab. If you know the **Offering ID** number, type it in the search box and click **Search**.



*For OJT, Customized Training, or Career Services, provider information is manually added to OSOS. Classroom training must be listed on the Eligible Training Provider List (ETPL) as specified by the designation "ETPL Auto Load" in the Service Description.*

## CAREER SERVICES

If the **Offering ID** is not known, click on the **General Info** tab. Enter any known information in the available data fields. OSOS allows you to enter a partial name for the **Provider Name** and **Service Name** fields. You can also select the **Program** or **Service Type** from the corresponding drop down menu. Click **Search**.

The screenshot shows the OSOS web application interface for the 'Offering Search' function. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, a secondary navigation bar shows 'Provider Search', 'Provider Detail', 'Offering Search' (highlighted), 'Offering Detail', 'Links', and 'NextGen'. The main content area has sub-tabs for 'Quick Search', 'General Info' (selected), 'List Search', and 'Custom'. The 'General Info' section contains several input fields: 'Location' (with a dropdown menu showing 'WIB Clinton/Essex/Franklin/Hamil' and a 'City' field), 'Start Date Range' (with 'From' and 'To' fields), 'Provider Information' (with 'Provider Name', 'Provider Status' set to 'Active', 'Program' dropdown, and 'Service Type' dropdown set to 'Occupational Skills Training'). A table below these fields has columns for 'Provider Name' and 'Description'. At the bottom, there is an 'Options' bar with buttons for 'Search', 'Assign to List', 'Clear', 'Detail', 'Delete', and 'Schedule'. A status bar at the very bottom displays 'Staff: CARSTENSEN III, POUL', 'Office: PLATTSBURGH', 'Security: Search', and the date '01/14/2021'. Three red arrows are overlaid on the image: one pointing to the 'Provider Name' field, one pointing to the 'Service Type' dropdown, and one pointing to the 'Search' button.



If your search only returns one result, OSOS will navigate directly to the "Offering Detail" screen for that provider. Click on the "Return to Search" button at the bottom of the screen to navigate back to the "General Info" tab. This will allow you to schedule the service.

CUSTOMER
**PROVIDER**
EMPLOYER
STAFF
HELP

Provider Search
Provider Detail
Offering Search
**Offering Detail**
Links
NextGen

**Health Aide Program** Offering ID: 141535 1 of 1

**General Info** Lists Attachments

**Provider Info**

Provider Name: ABC Counseling

Service Category: Occupational Skills Training Element

Service Type: Occupational Skills Training

Service Description: ETP Autoload 02/07/2019

Pay for Performance: No

ETP Status:

**Schedule**

Start Date:  End Date:

Start Time:  End Time:

Sun.  Mon.  Tue.  Wed.  Thu.

Fri.  Sat.

**Location**

Location: Main Campus

Address: 123 Main Street

City: Plattsburgh State: New York

Zip: 12601 WIB: Clinton/Essex/Franklin/Hamilt

**ETP Program of Study Leading to**

- Industry Recognized Certification
- Registered Apprenticeship
- State or National License
- Associate Degree
- Bachelor's Degree
- Community College Certificate
- Secondary School Diploma or Equivalent
- Employment
- MSG Leading to Credential
- MSG Leading to Employment

**Additional Info**

Cost: \$ 1.00 Total Seats:  Available Seats:

Description:

Save Single Save Ongoing Provider Services **Return to Search**

Staff: CARSTENSEN III, POUL
Office: PLATTSBURGH
Security: Search
01/14/2021

Select the appropriate offering and click the "Schedule" button at the bottom.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Provider Search Provider Detail **Offering Search** Offering Detail Links NextGen

1 - 1 of 1

Quick Search **General Info** List Search Custom

**Location**  
WIB Clinton/Essex/Franklin/Hami City From To

**Start Date Range**  
From To

**Provider Information**  
Provider Name ABC Service Name Program  
Provider Status Active  
Service Type Occupational Skills Training Service Type

<input type="checkbox"/>	Provider Name	Description
<input checked="" type="checkbox"/>	ABC Counseling	ETP Autoload 02/07/2019

Options Search Assign to List Clear Detail Delete **Schedule**

Staff: CARSTENSEN III, POUL Office: PLATTSBURGH Security: Search 01/14/2021

By clicking **Schedule**, the service will be added to the customer's record, within the **Services** tab. OSOS will navigate to the **Services** tab automatically.

Select the service and complete the following data entry in the **Detail** window (left hand side).

**Plan. Start Date** - Enter the date on which the service is planned to begin.

**Plan. End Date** – Enter the date on which the service is planned to end. Enter the same date you entered for **Plan. Start Date** if it is a one-day service.

**Actual Start Date** – Enter the date on which the service actually began.

**Actual End Date** – This field can be left blank until the service actually ends. If the service is a one-day service (such as a Comprehensive Assessment), enter the same date that you entered in the Actual Start Date field.

**Next Contact Date** – Enter a date on which to follow up with the participant. This date should be within 90 days of the first service in order to verify the program status and prevent the participant from exiting the enrollment.

**Program Service Type** – Select the appropriate program service type corresponding to the type of service.

**O\*Net** – (If Applicable) Enter the appropriate O\*Net code. If you do not know the O\*Net code, refer to the [O\\*Net Titles in OSOS Guide](#).

**Staff Assigned** – Click the “Change” button to enter the staff assigned to this participant. If you are the staff member assigned to this participant, you may choose the down arrow and select “Assign to Me.”

**WIB Assigned, Agency, Office** – These fields will auto load information already attached to the service. If the information is incorrect, click on the **Change Office** button to update.

Then click **Save** at the bottom of the screen.

CUSTOMER
PROVIDER
EMPLOYER
STAFF
HELP

Customer Search
Customer Detail
Comp Assess
Services
Links
JobZone
NextGen

Pickett, Polly      SSN: \*\*\*-\*\*-8888      OSOS ID: NY012312655      Record Saved

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

**Detail**

Service Name	Health Aide Program		
Service Desc.	ETP Autoload 02/07/2019		
Service ID	140967		
Service Type	Occupational Skills Training		
Provider Name	ABC Counseling		
Location Name	Main Campus		
Provider ID	88480	Offering ID	141535
Plan. Start Date	01/14/2021	Plan. End Date	01/14/2021
Actual Start Date	01/14/2021	Actual End Date	01/14/2021
Completed Successfully	Yes <input type="checkbox"/>		
Next Contact Date	02/14/2021		
Program Service Type	ITA-Training <input type="checkbox"/>		
Part Time Learn.	<input type="checkbox"/>	Distance Learn.	<input type="checkbox"/>

**Funding**

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

Total Funding

Petition #

RR Event #

Incumbent Worker Training

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/>	ABC Counseling	Health Aide Program	01/14/2021	01/14/2021	ITA-Training

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

Save
Customer Detail
Comp Assess
Comments
Check Labor Market Information

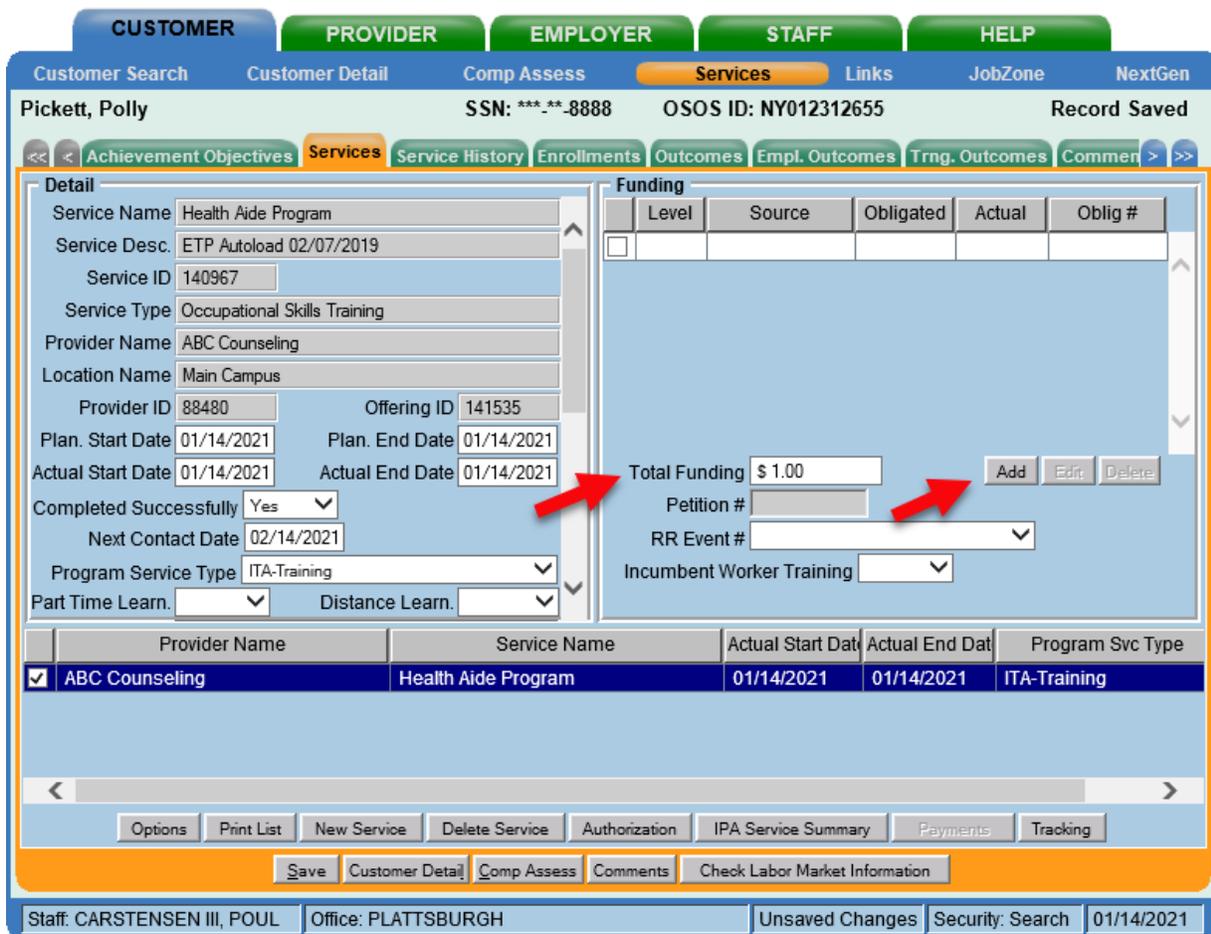
Staff: CARSTENSEN III, POUL    Office: PLATTSBURGH    Unsaved Changes    Security: Search    01/14/2021

## ADD FUNDING

Next, complete the **Funding** section (right-hand side) for the service. To do this, first enter \$1.00 in the **Total Funding** field. Click the **Add** button.



*OSOS is not used as a financial tracking system. It is only used to track programmatic services provided. For this reason, the \$1.00 entry acts as a placeholder so that the system will designate a funding source to be attached to the service. This allows the system to track services provided under this grant.*



**Customer:** Pickett, Polly | **SSN:** \*\*\*-\*\*-8888 | **OSOS ID:** NY012312655 | **Record Saved**

**Navigation:** CUSTOMER | PROVIDER | EMPLOYER | STAFF | HELP

**Service Details:**

- Service Name: Health Aide Program
- Service Desc: ETP Autoload 02/07/2019
- Service ID: 140967
- Service Type: Occupational Skills Training
- Provider Name: ABC Counseling
- Location Name: Main Campus
- Provider ID: 88480 | Offering ID: 141535
- Plan. Start Date: 01/14/2021 | Plan. End Date: 01/14/2021
- Actual Start Date: 01/14/2021 | Actual End Date: 01/14/2021
- Completed Successfully: Yes
- Next Contact Date: 02/14/2021
- Program Service Type: ITA-Training
- Part Time Learn. | Distance Learn.

**Funding Section:**

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

Total Funding: \$ 1.00 [Add] [Edit] [Delete]

Petition #: [ ]

RR Event #: [ ]

Incumbent Worker Training: [ ]

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/> ABC Counseling	Health Aide Program	01/14/2021	01/14/2021	ITA-Training

**Footer:** Staff: CARSTENSEN III, POUL | Office: PLATTSBURGH | Unsaved Changes | Security: Search | 01/14/2021

After clicking **Add**, a pop-up widow will appear with a list of funding sources. Check the box next to Employment Recovery- NDWG to select that funding source. Then, enter \$1.00 in the **Obligated Amount** field and click **OK**.

**Funding**

	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	WIB	WIOA Adult Local	2018	\$ 10000.00	
<input type="checkbox"/>	WIB	WIOA Adult Local	2019	\$ 99998.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2018	\$ 9998.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2019	\$ 99999.00	
<input type="checkbox"/>	State	Youth Statewide 15%	2018	\$ 99900.00	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2019	\$ 100000.00	
<input type="checkbox"/>	State	Dislocated Worker Statewide 15%	2018	\$ 99995.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2019	\$ 100000.00	
<input type="checkbox"/>	State	Adult Statewide 15%	2018	\$ 99998.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2019	\$ 100000.00	
<input type="checkbox"/>	State	WIRED	2018	\$ 14998.00	WR12
<input type="checkbox"/>	State	H-1B Nursing	2018	\$ 4998.00	AA123451655A26
<input type="checkbox"/>	State	Industry Standard	2018	\$ 4999.00	NY222215
<input type="checkbox"/>	WIB	Opioid Crisis DWG	2018	\$ 99998.00	DW-33018-19-60-A-36
<input checked="" type="checkbox"/>	WIB	Employment Recovery - NDWG	2020	\$ 100000.00	DW35478

Obligated Amount  ×

OR

Obligated Percentage

WIB

Office

Region

➔

The funding will now appear in the **Funding** section on the right-hand side. Click **Save** at the bottom of the screen.

CUSTOMER
PROVIDER
EMPLOYER
STAFF
HELP

Customer Search
Customer Detail
Comp Assess
Services
Links
JobZone
NextGen

Pickett, Polly SSN: \*\*\*-\*\*-8888 OSOS ID: NY012312655 Record Saved

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

**Detail**

Service Name: Health Aide Program

Service Desc: ETP Autoload 02/07/2019

Service ID: 140967

Service Type: Occupational Skills Training

Provider Name: ABC Counseling

Location Name: Main Campus

Provider ID: 88480      Offering ID: 141535

Plan. Start Date: 01/02/2021      Plan. End Date: 01/02/2021

Actual Start Date: 01/02/2021      Actual End Date: 01/12/2021

Completed Successfully: Yes

Next Contact Date: 01/17/2021

Program Service Type: ITA-Training

Part Time Learn.      Distance Learn.

**Funding**

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>	WIB	Employment Rec	\$ 1.00	\$ 0.00

Total Funding: \$ 1.00      Add Edit Delete

Petition #

RR Event #

Incumbent Worker Training

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/>	ABC Counseling	Health Aide Program	01/02/2021	01/12/2021	ITA-Training

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

Save Customer Detail Comp Assess Comments Check Labor Market Information

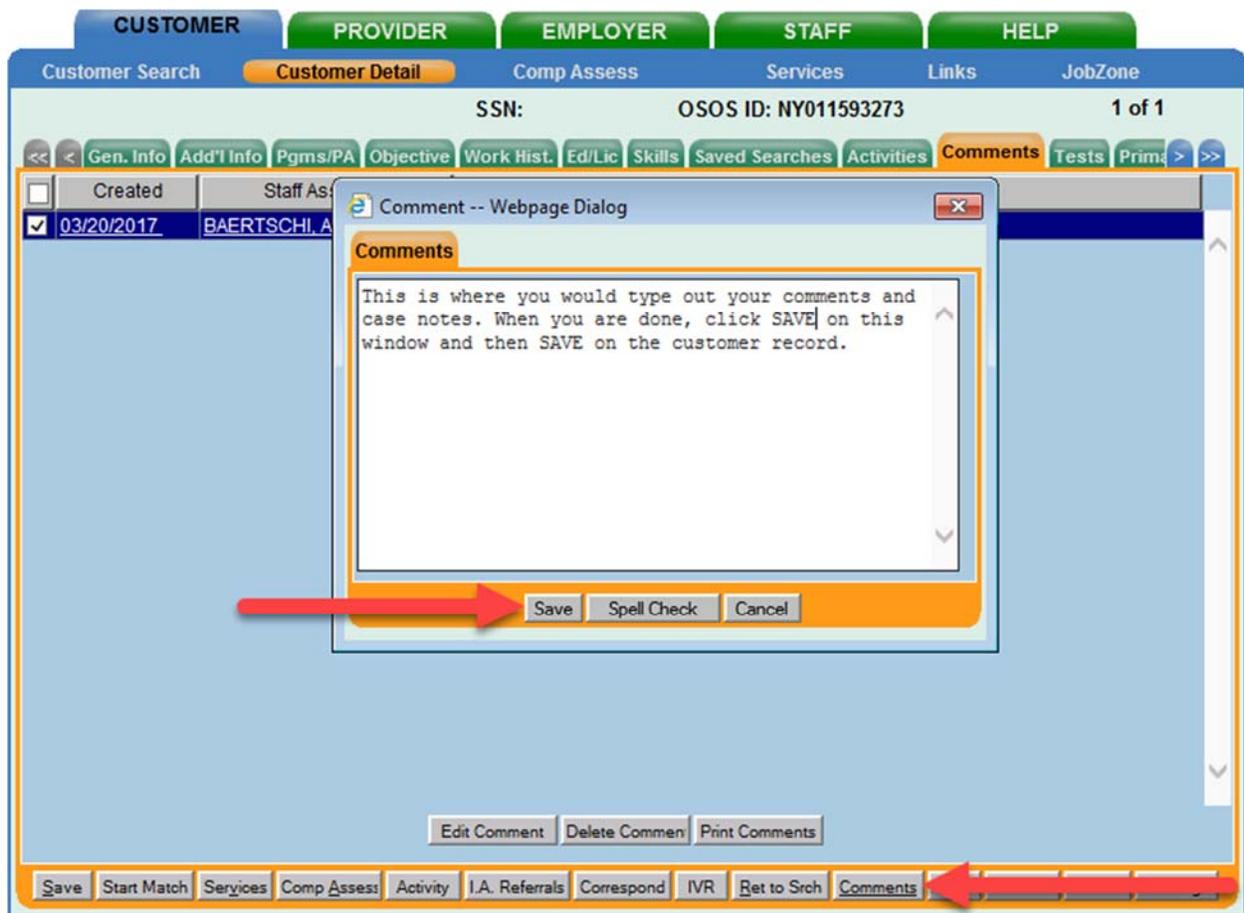
Staff: CARSTENSEN III, POUL Office: PLATTSBURGH Security: Delete      01/21/2021

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## ENTER COMMENTS

**Comments** are used to record case management notes. All users must record comments, details about services, and case notes that concern the customer being served.

Click on the **Comments** button at the bottom of the screen in the **Customer** module, **Customer Detail** window. The **Comments** -- Webpage Dialog box will appear. Enter the comment and click the **Save** button on the Webpage Dialog box. The comment will then appear listed on the **Comments** tab next to the date the comment was entered. Remember to save the entire customer record when you are finished entering comments, using the Save button at the bottom left of the screen.







## RESOURCES AND ASSISTANCE

[Accessing the System](#)

[Creating a Basic Customer Record OSOS Guide](#)

[WIOA Performance Measures and Outcomes Guide](#)

[O\\*Net Titles in OSOS Guide](#)

Additional program information, OSOS guides and other resources can be found at:  
<http://labor.ny.gov/workforcenypartners/osos.shtm>

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: [Help.OSOS@labor.ny.gov](mailto:Help.OSOS@labor.ny.gov)