



Gun Violence Prevention (GVP) Local Initiative OSOS Guide



Table of Contents

Purpose	1
Searching for the Customer	2
Quick Search	3
Basic Customer Record	9
Basic Customer Record Details	. 10
Case Notes	. 16
Comprehensive Assessment	. 17
Services	. 21
Entering an Achievement Objective for Youth Services	. 21
Entering the Service	. 23
Closing a Service	. 34
Outcomes	. 36
Training Outcomes	. 36
Employment Outcomes	. 38
Resources and Assistance	. 42

PURPOSE

New York State Department of Labor (NYSDOL) is partnering with Local Workforce Development Areas (LWDAs) to provide job training, credentialing and placement in goodpaying jobs to young workers between the ages of 18 and 24, at least 75% of whom must reside in zip codes impacted by high rates of gun violence. In addition to each area's existing referral network, youth will be referred by trusted community service providers with priority given to referrals from gun violence interveners and other anti-gun violence advocacy organizations.

This effort is one part of Governor Cuomo's first-in-the-nation gun violence disaster emergency and comprehensive strategy to build a safer New York. This initiative treats gun violence as a public health crisis and includes short-term solutions as well as long-term strategies that focus on community-based intervention and prevention strategies to break the cycle of violence.

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



This guide provides instructions on how to conduct the OSOS data entry for the Gun Violence Prevention (GVP) Local Initiative.

SEARCHING FOR THE CUSTOMER

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

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

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

SSN 1	Customer ID ID 1				- 1
Enter or paste one or more SSNs. More	Enter or paste one of more Customer IDs.	r ~	Partial SS Last Nar First Nar Middle Init Birth Da Usernar Email Exis Em	SN	
OSOS ID Vet Status	Seeker Name CN	SA CMSS	WIOA	WSIO	TAA



QUICK SEARCH

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

SEARCHING BY CUSTOMER FULL OR PARTIAL NAME

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



As a best practice, staff should perform a name search for any customer they are working with to determine if duplicate OSOS records exist for the same customer. If a duplicate record is found, please contact <u>help.osos@labor.ny.gov</u>.

Click the Search button.





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

CUSTOMER	PROVIDE	R EMPLOYER	STAFF	HELP
Customer Search	Customer Detail	Customer Detai	Services	Links Job7
Smith, Jane		5. 05	0.5 ID: NY01494327	76 1 of 1
Gen. Info	neral Info	A Objective Work Hist. Ed/Lic	Skills Saved Searc	hes Activities Comments Te > >>
Customer Data	Active V	ob Seeker Active		Ethnic Heritage & Race
•Username testsmith12	3	Password password	Merge	Education & Employment

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

Customer SSN SSN 1 Enter or paste one or more SSNs. ID 1 More More	Partial SSN Last Name smith First Name jane							
More	Birth Date Username imail Exists Fmail							
	Title Bar							
OSOS ID Seeker Name Vet DOB	Office							
NY011664134 Smith, Jane No 11/15/1971 PATCHOGUE	Active A							
NY011668521 Smith, Jane M No 06/01/1980 TROY	Active							
<								



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

OSOS ID DOB Status Office	
VY015298310 01/01/19 Active Schenectady County Career Center	
NY015298309 01/01/19 Active Schenectady County Career Center	
NY015298322 01/01/19 Active Schenectady County Career Center	
NY015298317 01/01/19 Active Schenectady County Career Center	
NY015298312 01/01/19 Active Schenectady County Career Center	
NY015298308 01/01/19 Active Schenectady County Career Center	
N 015298320 01/01/19 Active Schenectady County Career Center	~
045000000 04/01/14 Active Uniondale Union Free School District	-
Detail	lew
NY015298317 01/01/15 Active Schenectady County Career Center NY015298312 01/01/15 Active Schenectady County Career Center NY015298308 01/01/15 Active Schenectady County Career Center NY015298320 01/01/15 Active Schenectady County Career Center NY015298320 01/01/15 Active Schenectady County Career Center NY015298320 01/01/15 Active Schenectady County Career Center Other Conservation 01/01/15 Active Schenectady County Career Center Detail L Post Match Refer Activity P/PA Comments Correspond IVR	



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

CUSTOM	R PROV	IDER	EMPLOYER	STAR	FF	HELP
Customer Search	Customer De	tail Co	omp Assess	Service	s	Links CareerZone
Smith, Jane		SSN:	C	SOS ID: NY01	То	ggle Arrows 1 of 4® 🕀
Gen. Info	bility Add'I Info Pgr	ns/PA Objectiv	e Work Hist. Ed/l	ic Skills Save	1 Search	nes Activities Comments Te > >>
Customer Data	tatus Active V	Job Seeker	Active V	Maure		Ethnic Heritage & Race
ast Name Smth	101123	Password P	lane	Merge		Education & Employment
Date of Birth 06/0	1/1980 Gender F	emale V	Portfolio Lvl. Job	Zone Adult		HS + 2 vr Associates Degree
Address 123 M	ain Street				~	School Status Not Attending School; Secondary Scho V
City Aban County Aban Phone 518	/ ✓ Cor 555-5555 Ext	State New Yo United State Alt	es V Ext Fa	tip 12206 Metro V	U	Employment Status Not Employed Inderemployed
Email janesr URL	nith@test.edu				~ +	Contact Preferences
●U.S. Citizen Enrolments JZ/C	Z Manager 🗌	·	Add to Case Los	ed	6	Ose Postal Fax Pri. Phone Email Alt. Phone Resume Contact Info
Customer Assigner Staff Assigner WIB Assigner Agency Office UI Claiman	nent Albany/Rensselaer/So Department of Labor ALBANY	chenectady Counti	Change Change Change Office Work/Beenth/Re	oord inte	Pr ernet Re	Registered 03/08/2017 Origin Staff Profiled ofiled Date esume Confidential
Save Start Match	ervises Comp Asses	Activity I.A. Refe	errals Correspond	IVR Bet to Srch	Comme	nts Tag Resume Sched Message



SEARCHING BY FULL SOCIAL SECURITY NUMBER OR NY ID

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

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

Customer Search Quick Search Customer S SSN SSN 1 Enter or p more SSNa.	Customer Search Quick Search	Comp A	ssess t Search Geogr er ID 011668521 r paste one stomer IDs.	Services	Links Programs List Partial SSN Last Name First Name Middle Initial Birth Date Username Email Exists Email	JobZone
	More		More		Linda	
	Seeker Name	Vet	DOB		City	Status
Qptions Search	Search	Accesso	Post // Pict	Refer Activity	P/PA Comments	Correspond IV/2 New

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



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



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

Customer Search Customer Detail Comp Assess Services Links Image: Customer Search General Info Education Job Criteria Text Search Geographic Activities Programs List Search Report Customer SSN Customer ID ID 1 ID 1 ID 1 ID 1	
Quick Search General Info Education Job Criteria Text Search Geographic Activities Programs List Search Report Customer SSN Customer ID ID 1 ID 1	ts > >>
Quick Search General Info Education Job Criteria Text Search Geographic Activities Programs List Search Report Customer SSN Customer ID ID 1 ID 1 ID 1 ID 1	ts > >>
Customer SSN Customer ID	
SSN 1 ID 1	
Enter or paste one or Enter or paste one or	
more SSNs. more Customer IDs. Partial SSN	
Last Name	
First Name	
Middle Initial	
Birth Date	
	— I
More	
Seeker Name OSOS ID Status DOB Office	
	~
Options Search - Clear Detail Asgn. to List Add to CL Post Match Refer Activity P/PA New	New

For detailed information on searching for a customer record, please see the <u>Performing a</u> <u>Customer Search OSOS Guide</u>.

For detailed information on creating a customer record, please see the <u>Creating a Basic</u> <u>Customer Record OSOS Guide</u>.



BASIC CUSTOMER RECORD

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

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

CUST	TOMER PROV	IDER EMPL	OYER	STAFF		HELP	
Customer Sea	rch <u>Customer Detai</u>	Comp Assess	Serv	vices	Links	JobZone	NextGen
Parker, John		S SN: ***-**-32	0\$0\$	ID: NY01674	7525		1 of 1
Gen. Info	Bigibility Add'I Info Par	ns/PA Objective Work	Hist. Ed/Lic Ski	ills Saved Se	arches Ac	tivities Commen	
Customer Da	ita				1	F-1 - 1	
 SSN 	●Status Active 🗸	Job Seeker Active	~			Ethnic Heritage & I	Race
●U sernam e	parkeree	Password park 7890		Merge	Educat	tion & Employmen	nt
●LastName	Parker	●First Name John		MI	●Educat	tion Level	
Date of Birth	05/01/2004 • Gender M	lale 💙 🏽 Portfoli	io Lvi. JobZone Ad	dult 🗸	10 Grade	2	~
●Address	123 Main Street				School	Status	
				\sim	In-school	, Secondary School	or Less 🗸
●C ity	Anytown	State New York	✓ ●Zip 123	345	●Em ploy	ymentStatus	
County	Onondaga 🗸 Co	untry United States	✓ Metro	~	Not Empl	oyed	`
Phone	e 518-555-5555 Ext.	Alt Ext.	Fax		Underem	ı ployed 🚬 🗡	
Em ail	test@testmail.com			v	Long Ter	rm Unem ployed	<u> </u>
URL					V Use	Postal Fax	,
●U.S. Citizer	n 🗸				Pri, F	Phone Em	ail
Enrolments	JZ/CZ Manager 🗌	Add	to Case Load		Alt. P	hone Resume	e Contact Info
Customer As	signment				- ,		
Staff Ass	igned KLINE, REBECCA	Char	ige 🔻		Registe	ered 07/30/2021	
WIB Ass	igned Albany/Rensselaer/S	chenectady Counties			Or	igin Staff	
Ļ	gency Capital District WAE	Char	ige		Prof	filed	
	Office Albany Career Central	Offic	De		Profiled D	ate	
UICla	iim ant None (Not Claiming UI	VVa4	k Search Record	Interne	etResume	Confidential	
<u>S</u> ave Start Ma	tch Ser <u>v</u> ices Comp <u>A</u> sses:	Activity I.A. Referrals Co	rrespond IVR <u>F</u>	Ret to Srch Co	mments Ta	g Resume Sche	ed Message

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



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



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

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

BASIC CUSTOMER RECORD DETAILS

For detailed instructions on creating a basic customer record, please see the <u>Creating a Basic</u> <u>Customer Record OSOS Guide</u>.

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

General Info Tab

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

	CUSTOMER	PROVIDER	R EM PLOYER	STAFF		HELP	
Custom	er Search 🧧	Customer Detail	Comp Assess	Services	Links	JobZone	NextGen
Parker, 、	John	🗿 SSN Webpag	e Dialog	;	< !5	1	of 1
Re R G	en. Info Eligibili	SSN			hes	Activities Comments	Te > >>
Custo Custo Use	om er Data SSN • Stat ern am e parkeree	IS	SSN 12345-6789 Confirm SSN 12345-6789		Ed	Ethnic Heritage & Ra	œ
●Last	Name Parker	N	otDisdosed 🔄		₽E d	ucation Level	
D ate	of Birth 05/01/2		Ok Cancel		10 0	Grade	~
Ac	dress 123 Main	5,			Sc	hool Status	



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

_	CU STOMER PROVIDER	EM PLOY ER	STAFF	HELP	
Cu Par	Ethnic Heritage and Race Webpage Dialog		$\times \frac{nks}{25}$	JobZone	NextGen 1 of 1
	Ethnic Heritage and Race		che	s Activities Comme	nts Te > >>
Γ	Ethnic Heritage Hispanic or Latino N of Hispanic or Latino N of Disclosed		- E	Ethnic Heritage &	Raœ
	■Race □ Alaskan or American India		•E 10 •S	ducation Level Grade chool Status	~
	☐ Asian ☐ Black or African American ☐ Hawaiian or Pacific Island	er	In- •E	school, Secondary School m ployment Status t Employed	or Less V
	☐ White ☑ N ot Disclosed		Und	derem ployed v Ig Term Unem ployed	~
			- •	Contact Preferences Use Postal Fax	
	Ok Cancel			Pri. Phone Em	ail e Contact Info



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

CU STOMER PROV	IDER EM PLOY EF	R STAFF	HELP
Customer Search 🦲 Customer Detail	Comp Assess	Services	Links JobZone NextGen
Parker, John	SSN: ***-**-3232	O SO S ID: NY016747	7525 1 of 1
Customer Data	ns/PA Objective Work Hist.	Sixth Grade	arches Activities Comments Te >>
SSN Status Active Status Active parkeree	Job Seeker Active Password park7890	Eghth Grade Ninth Grade Tenth Grade	Ethnic Hentage & Race
LastName Parker	●FirstName John	Beventh Grade Twelfth Grade	•Education Level
●Date of Birth 05/01/2004 ●Gender M	ale 💙 • <u>Portfolio Lvl.</u>	JobZone Adult	10 Grade 🗸
Address 122 Main Street	1		School Status



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



Additional Info Tab

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

Programs / PA Tab

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

Objective Tab

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





Work History Tab

Select New Job Entry to enter a work history for the customer. Enter all required fields and any additional information provided by the customer. Since the population served under the GVP Initiative are youths and young adults, they may not have a work history. If the customer does not have any Work History, select No Information Provided.

CU	ISTOMER PROV	IDER EMPLOYE	ER STAFF		HELP	
Customer S	earch 🧧 Customer Deta	Comp Assess	Services	Links	JobZone	NextGen
Parker, John	ı	\$ \$N: ***-**-3232	OSOS ID: NY01674	7525		1 of 1
ee e Gen. Ir	nfo Bigibility Add'l Info Pa	ms/PA Objective Work Hist.	Ed/Lic Skills Saved Se	arches Act	iviti 5 Comm	ents Te >>>
- •Detail						
●Job Title	Facility Maintenance			O*Net Titles	Comple	te Fields
●Employer	General Hospital	Include online 🗹 🗣	tart D ate 08/01/2021	End Date		
Add ress	123 Church Street	Supervisor		Phone	Ex	t
		●Wage	\$12.50 Hourly	🗸 🗸 Но	ours/week 40	
 City 	Anytown	Reason for Leaving	Still employed	~	<u>'</u>	
●State	New York V	Zip Job Duties	Perform preventative and ge	eneral maintena	ance tasks on th	Job Duties
●C ountry	United States	<u> </u>	-			
 Job Type 	Part lime V		R	R Event#		Event
NAICS			NAICS Lookup			
ļ	Job	Company	City		Start	End
Facility Ma	aintenance	<u>General Hospital</u>	Anytown		08/01/2021	
						\sim
		_				~
	Add New Job Entr	V New Job Entry Delete	e Selection Audit			
<u>S</u> ave Start	Match Ser <u>v</u> ices Comp <u>A</u> sses:	A vity I.A. Referrals Correspo	ond IVR <u>R</u> et to Srch Co	omments Tag	Resume So	ched Message



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

CUSTOMER	PROVIDER	EMPLOYER	R STA	\FF	HELP							
Customer Search 🧲	Customer Detail	Comp Assess	Services	Links	JobZone	NextGen						
Parker, John		S SN: **-*-3232	OSOS ID: NYO	16747525		1 of 1						
🤜 < Gen. Info 🛛 Bigibility	< Comments Te >>>											
Operatil Detail	Index Melanesses and F	Denei Wiekere		Other Tries		- 40000800						
Job Hte neipers-insta	allation, Maintenance, and F	(epair Workers		 End Date 	10/15/2021	e 49909000						
Job Duties Webpag	e Dialog		X	Phone		Ext.						
Edit Job Duties				uity 🔽	Hours/week	40						
Font Family. V Font	Size ∀ B I U -8	FontFormat 🔻 📃	998		~							
Perform preventative an	nd general maintenance	tasks on the inside and	outside of	l general mainte	enance tasks on	the Job Duties						
Assist the gardening st	affin handling grounds	keeping activities.										
Assist with renovation a	and remodeling activities	s including repairing plas	sters and	RR vent#		Event						
drywall and painting str Mow and maintain lawn	ructures ns.			Ente	er Job Du	ties						
Clean floors using broo	oms, mops, and scrubbi	ing cloths	one ed of									
L inply wastepaper bas	kets and ensure that an	galbage is properly disp	10560.01									
				tv	Start	End						
				~	08/01/2021	10/15/2021						
						^						
	Save (Save										
		New Job Entry Delete S	election Audit									
Save S. Save	mp <u>A</u> sses: Activity	I.A. Referrals Correspond	IVR <u>R</u> et to Srch	Comments T	ag Resume	Sched Message						

Ed/Lic Tab

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

Skills Tab

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



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



CASE NOTES

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

	R EMPLOYE	R STAFF	HELP
Customer Search Customer Detail	Comp Assess	Services Links	JobZone NextGen
Wallace, Jamie	SSN:	OSOS ID: NY014957117	1 of 1
< Content of Content o	A Objective Work Hist.	Ed/Lic Skill Comment	S S Comments Te > >>

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



COMPREHENSIVE ASSESSMENT

Information documented in the Comprehensive Assessment window is important for recording the customer's barriers and challenges. For detailed instructions on completing the Comprehensive Assessment, please see the <u>Comprehensive Assessment & Supplemental Data</u> <u>Guide</u>.

Many of the fields in Comp Assess are used to determine eligibility under WIOA programs. Since the GVP Local Initiative is a state funded program, participants do not need to be coenrolled in the WIOA programs. Participants served solely under the GVP Local Initiative will not be included in WIOA performance. For the purposes of this initiative, providers should only enter information that is known. If the information is unknown, please select **No** or **Not Disclosed**.

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

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



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



CUSTOMER PROVIDER EMPL	
Customer Search Customer Detail <u>Comp Assess</u>	Comp Assess CareerZone NextGen
Parker, John SSN:	73 ID. IUI J141 113
Reality Freatment Education Financial Family Health Treatme	ents Legal Housing Transportation Comments Attachments > >>
Origination Date 08/09/2019 Last Update 08/09/2019	Job Behavior and Skills
	Employment Behavior
Job Title First-Line Supervisors of Retail Sales Workers	~
Wage Desired Per Hourty	~ · · · · · · · · · · · · · · · · · · ·
Geographical Location	Job Seeking Skills
Within 50 miles of 12061	
	0
Is the customer interested in Ves O No	×
Current Employment Status Net Employed	Job Keeping Skills
Poor Work History?	~
Youth Needing Additional	~ · · · · · · · · · · · · · · · · · · ·
Assistance? Serious Barriers to	Summary of Occupational Strengths & Weaknesses
Employment?	
Employment?	
	View Employment History ACI*NET
Save Customer Detail Services Activity	Correspond WIOA Eligibility Summary Comments



Below are some noteworthy points for filling out the tabs located within the **Comprehensive Assessment** window for participants only enrolled in the GVP Local Initiative. However, as a best practice, staff should always enter as much information as known about the customer to better serve and meet their needs.

Employment Tab

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

Education Tab

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

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

Family Tab

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



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



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

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

Housing Tab

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

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



SERVICES

Staff use the **Services** window in OSOS to record the services provided to the customer.

ENTERING AN ACHIEVEMENT OBJECTIVE FOR YOUTH SERVICES

In order to enter a Youth Service for the customer, an **Achievement Objective** must first be saved in the customer record. Please note, if you are recording an Adult Service for this participant, you do not need to record an **Achievement Objective** and can go directly to <u>Entering the Service</u>.

To create an Achievement Objective, select the **Customer** module, **Services** window, **Achievement Objectives** tab. Click the **New Objective** button at the bottom of the screen.

	CUSTOMER	2	PROVIDER		EMPLOY	ER	STAF		HELP	
Cust	tomer Search	Custom	ner Detail	Comp A	ssess	Servi	ces	Links	JobZone	NextGen
Parke	er, John			S SN:		OSOS II): NY0167	47525		
	Achie vem ent Ob	jectives	Achie	vemen	t Objec	tive Tab		tcomes	Trng. Outcomes	Commen > >>
	EmploymentO	bjective 1	l o gradus	pooreners	recent employ			Ι.		
	Goal Just	ification								<
	Achievement Ob	jectives								
	Achievement O	bjective 📘						_		
	Туре	ofGoal				Goal	Attainmen	t		
	Planned Sta	art Date				Planne	IEnd Date			
	Actual Sta	art Date				Actu a	IEnd Date			
	E valuation	on Date								
	Closure F	Reason								
	Outcom e /	/ Status								Ŷ
	Ach	ievement	0 bje ctive			Туре			Attainm ent	
										^
	New Obje	ctive		New Objectiv	e Dele	e Objective	Print			
			Customer D	etail <u>C</u> omp	Assess Con	nments Ched	: Labor Mari	et Informa	tion	



Enter the Achievement Objective, Type of Goal, Planned Start Date and Actual Start Date.

Planned Start and Actual Start Date should be the date the participant entered into the GVP Local Initiative program.

Evaluation Date is the date halfway between the Actual Start Date and the Planned End Date

Goal Attainment should be Set, but attainment pending.

Click Save.

00010 mLA	PROVIDER	EM	PLOYER	STAFF		HELP	
ustomer Search Cus	tomer Detail	Comp Asse	ss Serv	ices	Links	JobZone	NextG
rker, John		S SN:	OSOS	D: NY01674	7525		
Achie vem ent Objective	Services Servic	e History Enr	oliments Outcome	s Empl. Out	comes Trn	g.Outcomes	Com men >
Employment Objectiv	e Tograduate high s	chool and obtain	employment in the cor	struction field.			
							~
Goal Justificatio	n						
- As bisyoment Objective							
Achievement Objective	S Obtain long-term em	norwment					1
Type of Goa	Occupational Skills		Goa	Attainment	Set but attain	ment pending	
Planned Start Date	08/01/2021	•	Planne	d End Date	10/15/2021		
Actual Start Date	08/01/2021		Δctu	al End Date		1	
F valuation D ate	09/01/2021		~u]	
Closure Reason			~				
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							~
Outcom e / Status							
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Achieveme	ntObjective	[Туре	[A	tainm ent	×
Achievem e Obtain long-term em ploym	nt Objective ent	0œ	Type upational Skills	Set, but	A4 attainment p	tainm ent ending	
Achievem e Obtain long-term em ploym	nt Objectīve ent	000	Type upational Skills	Set, but	A attainment p	tainm ent vending	
Achievem e Obtain long-term em ploym	nt O bje ctive ent	0œ	Type upational Skills	Set, but	A attainment p	tainm ent vending	
Achievem e Obtain long-term em ploym	nt O bjective ent	000	Type upational Skills	Set, but	A attainment p	tainm ent rending	
Achievem e Obtain long-term em ploym	nt O bje ctive ent	O cc	Type upational Skills Delete Objective	Set, but	A atlainm ent p	tainm ent rending	
Achievem e Obtain long-term em ploym	nt O bje ctive ent N	O cc	Type upational Skills Delete Objective	Set, but	A atlainment p	tainm ent	
Achievem e Obtain long-tem em ploym	nt O bje ctive ent <u>Na Save</u> Customer Det	ew Objective	Type upational Skills Delete Objective ss Comments Che	Set, but Print ck Labor Marke	A attainment p t Information	tainm ent	
Achievem e Obtain long-term em ploym	nt Objective ent <u>Na Save</u> Customer Det	ew Objective	Type upational Skills Delete Objective s Comments Che	Print dk Labor Marke	A attainment p t Information	tainm ent ending	<u> </u>
Achievem e Obtain long-term em ploym	nt Objective ent <u>Na Save</u> Customer Der	ew Objective	Type upational Skills Delete Objective ss Comments Che	Set, but Print ck Labor Marke	A attainment p t Information	tainm ent rending	
Achievem e Obtain long-term em ploym	nt O bje ctive ent <u>Na Save</u> Customer Der	ew Objective	Type upational Skills Delete Objective ss Comments Che	Print k Labor Marke	A attainment p t Information	tainm ent	
Achievem e Obtain long-tem em ploym	nt O bje ctive ent <u>Save</u> Customer Der	ew Objective	Type upational Skills Delete Objective ss Comments Che	Print dx Labor Marke	A attainment p t Information	tainm ent	
Achievem e Obtain long-term em ploym	nt Objective ent <u>Save</u> Customer Def	ew Objective	Type upational Skills Delete Objective s Comments Che	Print k Labor Marke	A attainment p	tainm ent	
Achievem e Obtain long-term em ploym	Int Objective ent <u>Save</u> Customer Det	ew Objective	Type upational Skills Delete Objective ss Comments Che	Print dk Labor Marke	A attainment p t Information	tainm ent ending	
Achievem e Obtain long-term em ploym	nt O bje ctive ent <u>Nave</u> Customer Der	ew Objective	Type upational Skills Delete Objective ss Comments Che	Print dk Labor Marke	A a tlainm ent p t Information	tainm ent	



ENTERING THE SERVICE

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

CUSTOMER PROVIDE	R EMPLOY	'ER STAF	F	HELP	
Customer Search Customer Detail	Comp Assess	Services	Links	JobZone	NextGen
Parker, John	S SN:	OSOS ID: NY016	6747525		
Achie vem ent Objectives Services	Services	s Outcomes Empl. 0	Outcomes Tr	ng.Outcomes Co	m m e n > >>
Employment Objective Tograduate hig	In perana cerain emprej	ment in the construction fie	ald.		
Goal Justification					$\hat{\mathbf{Q}}$

Select the **New Service** button.

CUSTOMER	IDER EMPLO	YER STAFF	H	IELP
Customer Search Customer Detail	Comp Assess	Services	Links Care	eerZone NextGen
Parker, John	SSN:	OSOS ID: NY01514	7173	
< Achievement Objectives Services	Service History Enrollme	nts Outcomes Empl. Outc	omes Trng. Out	comes Commen > >>
Detail	_1	Funding		
Service Name		Level Source	Obligated Ac	tual Oblig#
Service Desc.				
Service ID				\sim
Service Type				
Provider Name				
Location Name				
Provider ID Of	fering ID			
Plan. Start Date Plan. E	nd Date			Ť
Actual Start Date Actual E	nd Date	Total Funding		Add Edit Delete
Completed Successfully		Petition #		
Next Contact Date		RR Event #		Addl Assist
Program Service Type		Incumbent Worker Trainin	g	
Part Time Learn. Distanc	e Learn.			
Provider Name	Service Name	Actual Start D	at Actual End Dat	Program Svc Type
				>
New Service	ice Delete Service Aut	orization IPA Service Summ	ary Payments	Tracking
	Presidente Arresto		Information .	
Save Custo	omer Detaij Comp Assess Co	mments Check Labor Marke	momation	



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

CUSTOMER	PROVIDER	EMPLOYE	R	STAFF	HELP	
Provider Search P	rovider Detail 🛛 🚺 🌅 Off	fering Search	Offering	Detail Links	NextGen	
Quick Search General Info	General Info					1
	D I Enter or paste one or more Offering IDs.	^				
	More	<u> </u>				
Provider Name	Service Na	ame	Location			Descript
<					_	>
Options	Search	 Assign to List 	<u>C</u> lear Deta	i Delete Schedule		
Staff: PALLOZZI, TALIA	Office:				Security: Search	02/25/2019



Verify the correct **WIB** is selected

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

CUSTOMER PROVIDER EMPLOYER	STAFF HELP
Provider Search Provider Detail Offering Search Offering) Detail Links NextGen
Quick Search General Info List Search Custom Location Start Date WB Albany/Rensselaer/Sohenec City From From Service Type Webpage Dialog	e Range To Xam
 L2 NEG Specific Services L2 State Funded Programs L2 Trade Act L2 Training L2 WIOA Youth Services L2 Z NYSDOL ONLY 	Service Type
Labor Exchange	Description
- NYESS	
Employment & Training (in active)	
Hostos CC	
L2 WIOA SYEP	
PROMISE Parent Center (ONLY)	
	Security: Search 08/03/2021
Keyword(s) Search OK Clear Cancel	



Select the corresponding **Service Type** being provided to the participant and click **OK**.

CUSTOMER	PROVIDE	ER EMPLOY	ER STA	FF	HELP	
Provider Search Pr	rovider Detail	Offering Search	Offering Detail	Links	NextGen	
Quick Search General Info	List Search Cus	tom	Start Date Pange			(
WIR Albany/Panesalaar	Sahanar 🗙 City		From	То		
Senrice Type Webnage	Dialog		Tion	×		
Service Type Trespage	bialog					
Service Type						▼
L2 NEG Specific Service	es					
L2 State Funded Progra	ims				Service Tvo	
🗀 L2 Trade Act						
🔤 L2 Training						
Cccupational Skills	Fraining Element					
│	Skills Training		Servic	e Type		
L Caree	r Services/Trainii	ng (Intensive/Training)				
L 🗀 Training					Description	
🗀 L2 WIOA Youth Service	S				Description	
L2 Z NYSDOL ONLY						
📮 Labor Exchange						
NYESS						
🖵 WIOA Basic Career Ser	vices (WIA Core))				
Employment & Training	(inactive)					
Hostos CC						>
L2 WIOA SYEP				ule		
					Security: Secret 0	2/05/2024
PROMISE Parent Cente	r (ONLY)				Security. Search 10	5/05/2021
Keyword(s)	Se	earch	ок ок			



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

сизтом	ER	PROVIDER	EMPLOY	ER	STAFF	HELP	
Provider Search	Provide	er Detail 🛛 🦲	Offering Search	Offering D	etail Links	NextGen	
Quick Search Genera	al Info List S	earch Custom					
Uccation WIB Albany/Ref	nsselaer/Schen	ec 🗸 City		From	ange To		
Provider Inform	ation						
Provider Name		Se	rvice Name	Pr	ogram		∽
Provider Status	Active						
Service Type	Occupational	Skills Training	Service	Туре		Service Type	
, <u> </u>							
			•				
Provider N	ame	Service	Name			Description	
			,				
Ontines		Sec. 1	- Second	h	Salar Barren		,
Options		<u>S</u> earch	Searc	n –	velete Soffedule		



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

Select the appropriate service that is being provided and click **Schedule**.

		EIMIPLOTE	-R 51A	FF	HELP
Provider Search	Provider Detail	Offering Search	Offering Detail	Links	NextGen
					€ © 201 - 300 of 422 ⊙ ⊕
Quick Search General	Info List Search Cu	ustom			
- Location		(💳 Start Date Range		1
WIB Albany/Rens	selaer/Schener 🗸 C	iity	From	То	
Provider Informa	tion				
Provider Name		Service Name	Program	n	~
Provider Status 🛛	Active				
Service Type) e e un etien el Chille Trein				
	occupational skills frain	ning			Service Type
	оссирацопал эклііз ттаіп	ning			Service Type
	occupational Skills frain	ning			Service Type
	occupational Skills fram	ning			Service Type
	occupational skills fram	ning			Service Type
	occupational Skills Hain	ning			Service Type
Provider Ner		Panico Nomo			Description
Provider Nas	nool, Inc. Welding	Senice Name			Description
Provider Ner	200 Stool, Inc. Welding	Senice Name		GVP Loca	Description
Provider Nar Modern Welding So Modern Welding So Mohawk Ambulanc	hool, Inc. Welding Training NYS Eme	Ponico Namo	P Auto load 08/0	GVP Loca	Description al Initiative Service
Provider Nar Modern Welding So Modern Welding So Mohawk Ambulanc Mohawk Ambulanc	hool, Inc. Welding thool, Inc. Welding Training NYS Eme e Training NYS Eme	Panico Namo Prgency Medical Technic ETF Prgency Medical Technic ETF	P Auto load 08/0 P Auto load 08/06/2	GVP Loca	Description al Initiative Service
Provider Nan Modern Welding So Modern Welding So Mohawk Ambulanc Mohawk Ambulanc Mohawk Valley Cor	hool, Inc. Welding hool, Inc. Welding Training NYS Eme Training NYS Eme Training NYS Eme	Property Medical Technic ETF Prgency Medical Technic ETF Prgency Medical Technic ETF	P Auto load 08/0 P Auto load 08/06/2 vides the student wit	GVP Loca	Description al Initiative Service knowledge and practical skills n
Provider Nan Modern Welding Sc Mohawk Ambulanc Mohawk Ambulanc Mohawk Valley Cor National Council of	hool, Inc. Welding hool, Inc. Welding Training NYS Eme Training NYS Eme nmunity C Tractor Tr State Boa NCLEX-R	Progency Medical Technic ETF Prgency Medical Technic ETF Prgency Medical Technic ETF Progency Medical Technic ETF	P Auto load 08/ P Auto load 08/06/A vides the student wit tional Council Licens	GVP Loca 14 14 h all the basic ure Examinatio	Description al Initiative Service knowledge and practical skills n on - Registered Nurse Examinati
Provider Nas Modern Welding Sc Mohawk Ambulanc Mohawk Ambulanc Mohawk Valley Cor National Council of National Council of	hool, Inc. Welding thool, Inc. Welding thool, Inc. Welding e Training NYS Eme e Training NYS Eme nmunity C Tractor Tr State Boa NCLEX-R siler Schol CDL Clea	Progency Medical Technic ETF Progency Medical Technic ETF Progency Medical Technic ETF railer Driver Training Pro RN Examination Nat	P Auto load 08/0 P Auto load 08/06/2 vides the student wit tional Council Licens	GVP Loca 14 h all the basic ure Examinatio	Description al Initiative Service knowledge and practical skills n on - Registered Nurse Examination
Provider Nar Modern Welding So Modern Welding So Mohawk Ambulanc Mohawk Ambulanc Mohawk Valley Cor National Council of National Council of	hool, Inc. Welding hool, Inc. Welding hool, Inc. Welding e Training NYS Eme e Training NYS Eme nmunity C Tractor Tr State Bos NCLEX-R siler Schol CDL Class	Encode Name Prgency Medical Technic ETF Prgency Medical Technic ETF Provide Training Provide RN Examination Nation Na	P Auto load 08/0 P Auto load 08/06/2 vides the student wit tional Council Licens	GVP Loca 14 h all the basic ure Examinatio	Service Type Description Initiative Service knowledge and practical skills n on - Registered Nurse Examination Schoolulo



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

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

Many services may be provided in one day. If this is the case, enter the same date in all four date fields and select the appropriate option on the **Completed Successfully** drop-down menu. If a training spans over a course of time beyond one day, then you will select **Completed Successfully** (yes/no) once the training has ended.

CUSTOMER	PROVIDER	EMPLOYER	STAFF		HELP	
Customer Search Custon	ner Detail Comp	Assess 🧲	Services	Links Car	eerZone Nex	tGen
Parker, John	SSN:	0	SOS ID: NY01514	7173		
< Achievement Objectives	Services Service History	y Enroliments Ou	tcomes Empl. Outo	comes Trng. Out	comes Commen	> >>
Plan. Start Date 08/02/2021	Plan. End Date 02/04/		el Source	Obligated A	ctual Oblig #	
Completed Successfully Next Contact Date 10/15/2	2021					
Program Service Type ITA-Train Part Time Learn. No V	Distance Learn. No					
Minimum Hours	Number of Weeks	'Net Total	Funding		Add Edit Delet	
Min. Prog. Agreed	<u></u> <u>N</u>		Event # bent Worker Trainin	g 📃	~	
Staff Assigned	Change					
Provider Name	Se	ervice Name	Actual Start D	ate Actual End Dat	t Program Svc 1	Туре
Modern Welding School, Inc.	Welding		08/02/2021		<u>ITA-Training</u>	
Coptions Print List	New Service Delete Ser	rvice Authorization	IPA Service Summ	tary Payments	Tracking	>
<u>S</u> a	ve Customer Detail <u>C</u> omp	Assess Comments	Check Labor Market	Information		



Choose an appropriate **Program Service Type**. This will vary based on the service provided. If you are recording an occupational skills training, select **ITA-Training**. If you are recording an On-the-Job training, select **Non-ITA Training**. Other services will be recorded as either **Basic Career Services** (for example, assessment or career guidance) or **Individualized Career Services** (for example, work experience, individualized service strategy, supportive services). Please note, if you are recording a youth service, **Youth Services** cannot be selected as the **Program Service Type** unless funded with WIOA funds.

If you are recording a youth service, select the appropriate **Achievement Objective** from the **Achievement Objective dropdown.**

If you are recording a training service, select the **O*Net Title** which corresponds to the training. You will also need to indicate if the training is part-time (yes/no) and if the training is offered via distance learning (yes/no.)

CUSTOMER	PROVIDER	EMPLOYER	STAFF	HELP	
Customer Search Cu	istomer Detail C	omp Assess	Services Links	CareerZone	NextGen
Parker, John	S	SN: OS	SOS ID: NY015147173		
R Achievement Objectiv	ves Services Service Hi	story Enrollments Out	comes Empl. Outcomes	Trng. Outcomes Comm	ien > >>
- Detail		Funding			
Plan. Start Date 08/02/2021	Plan. End Date 02	2/04/2022	I Source Ob	igated Actual Oblig	g #
Actual Start Date 08/02/2021	Actual End Date				
Completed Successfully	<u> </u>				
Next Contact Date 10	/15/2021				
Program Service Type 114	A-Training	~			
Minimum Hours	Number of Weeks				<u> </u>
O*Net 51412200 Welding, S	oldering, and Brazing Machin	O*Net Total F	unding	Add Edit D	elete
NAICS		NAICS	tition #		
Min. Prog. Agreed		RR	Event #	<u> </u>	
Achv. Objective	-		ent worker framing j		
Staff Assigned	_ <u>_C</u>	Sonvice Name	Actual Start Dati Act		
Modern Welding School	Inc Welding	Service Name	08/02/2021	ITA-Training	svc Type
<					>
Options Print Li	ist New Ser Dele	te Service Authorization	IPA Service Summary	Payments Tracking	
	Same Save		Charle Labor Market Jafar	ning in the second seco	
	<u>Save</u> Save	p Assess Comments	Check Labor Market mom	auon	
	N				

Click the Save button.



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

CUSTOMER	PROVIDE	R EMPI	OYER	STAFF		IELP	
Customer Search Cust	omer Detail	Comp Assess	<u> </u>	ervices L	inks Care	eerZone	NextGen
Parker, John		SSN:	OSC	S ID: NY0151471	173		
Achievement Objectives	Services Ser	vice History Enrol	ments Outco	mes Empl. Outco	mes Trng. Out	comes Comn	nen > >>
Detail			Funding				
Plan. Start Date 08/02/2021	Plan. End D	ate 02/04/2022 🔨	Level	Source	Obligated Ad	ctual Obli	g #
Actual Start Date 08/02/2021	Actual End D	ate					
Completed Successfully	~						
Next Contact Date 10/1	5/2021						
Program Service Type ITA-Tr	aining	~					
Part Time Learn. No 🗸	Distance Lea	arn. No 🗸					
Program		~					\sim
Minimum Hours	Number of We	eks	Total Eur	ding \$1.00		Add	۷dd
O*Net 51412200 Welding, Sold	ering, and Brazing I	Machin(O*Net	Petit	ion #			Huu
		NAICS	RR Ev	ent#		$\overline{}$	
Min. Prog. Agreed			Incumber	nt Worker Training			
Achv. Objective		Change		2	<u></u>		
Provider Name	1	Service Na	ime	Actual Start Dat	Actual End Dat	Program	Svc Type
Modern Welding School In	ic We	Idina		08/02/2021	notadi End Dat	ITA-Training	
	<u>.</u>				-		
<							>
	1	- 1 -			1	1	
Options Print List	New Service	Delete Service	Authorization	IPA Service Summa	ry Paymenta	Tracking	



The Funding Webpage Dialogue box will open.

Select the Gun Violence Prevention Local Initiative funding.

Enter 1 in the **Obligated Amount** field. This will automatically populate the **Obligated Percentage** field as \$1.00 or 100.

Click OK.

🕘 Funding -- Webpage Dialog

 \times

	Level	Funding Source	Year	Remaining	NEG/Contract/Grant
] w	ЛВ	WIO A Adult Local	2019	\$ 94330.00	
] w	ЛВ	WIO A Adult Local	2020	\$ 98971.00	
] w	ЛВ	WIO A Adult Local	2021	\$ 99901.00	
] W	ЛВ	WIOAD is located Worker Local	2019	\$ 92335.00	
] W	ЛВ	WIOAD is located Worker Local	2020	\$ 98086.00	
] W	ЛВ	WIOAD is located Worker Local	2021	\$ 99619.00	
] W	ЛВ	WIOAYouth Local	2019	\$ 99525.00	
] W	ЛВ	WIOAYouth Local	2020	\$999623.00	
] W	ЛВ	WIOAYouth Local	2021	\$ 99975.00	
] w	ЛВ	Youth Statewide 15%	2019	\$ 98345.00	
] w	ЛВ	Youth Statewide 15%	2021	\$100000.00	
] w	ЛВ	Dislocated Worker Statewide 15%	2019	\$ 99996.00	
] W	ЛВ	Dislocated Worker Statewide 15%	2021	\$ 99999.00	
] W	ЛВ	Adult Statewide 15%	2019	\$ 99998.00	
] W	ЛВ	Adult Statewide 15%	2021	\$100000.00	
] W	ЛВ	Trade and Economic Transition DWG	2018	\$9693.00	DW32
] W	ЛB	Employment Recovery - NDWG	2020	\$ 99999.00	Dwg5
1 <u>w</u>	<u>//B</u>	Gun Wolence Prevention Local Initiative	2020	\$ 100000.00	Add
Ob	Obligate bligated P	ed Am ount \$ 1.00 WIB Albany OR Office ALBAN ercentage 100 Region Capita	/Renssela IY IDistrict	aer/ Schenectady Coun	tie
		ок	ОК		



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

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

CUSTOMER	PROVIDER	EMPLO	DYER	STAFF		HELP	
Customer Search Cus	tomer Detail	Comp Assess	Se	rvices	Links	CareerZone	NextGen
Parker, John		SSN:	0\$05	5 ID: NY01514	7173		
Achievement Objective	Services Service	History Enrolln	ante Outear		amas Trag	Outcomer	
Detail	-		Funding				
Plan. Start Date 08/02/2021	Plan. End Date	02/04/2022	Level	Source	Obligated	Actual	Oblig #
Actual Start Date 08/02/2021	Actual End Date		<u>V WIB</u>	Gun Violence Pi	re <u>\$ 1.00</u>	<u>\$ 0.00</u>	
Completed Successfully	~						
Next Contact Date 10/1	5/2021						
Program Service Type ITA-1	raining	✓					
Part Time Learn. No 🗸	Distance Learn.	No V					
Program	Number of Weeke						× 1
O*Net 51412200 Welding Sol	dering, and Brazing Mac	hin O*Net	Total Fund	ling \$ 1.00		Add Edi	t Delete
NAICS	sening, and brazing mac	NAICS	Petitio	n #			
Min. Prog. Agreed			RR Ever	nt#		~	
Achv. Objective		~ ~	Incumbent	Worker Trainin	g		
Staff Assigned	_	Change 💌					
Provider Name	•	Service Nan	пе	Actual Start Da	ate Actual End	I Dat Progr	am Svc Type
Modern Welding School, I	nc. Weldin	g		08/02/2021	-	ITA-Train	ing
<							>
Options F t List	New Service De	alete Service A	uthorization	PA Service Sumn	nary Paym	nents Trackir	Ig
Save	Save Customer Detai	il <u>C</u> omp Assess (Comments CH	eck Labor Market	Information		



CLOSING A SERVICE

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

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

CUSTOMER	IDER EMPLO	DYER	STAFF	H	IELP
Customer Search Customer Detai	Comp Assess	S	ervices Li	inks Care	eerZone NextGen
Parker, John	SSN:	OSO	S ID: NY0151471	73	
< Achievement Objectives Services	Service History Enrollm	ents Outcor	nes Empl. Outco	mes Trng. Out	comes Commen > >>
Detail		Funding			
Service Type Occupational Skills Training		Level	Source	Obligated Ad	ctual Oblig#
Provider Name Modern Welding School, Inc	».	WIB	Gun Violence Pre	\$1.00 \$0.	.00
Location Name Modern Welding School, Inc	2.				\sim
Provider ID 2165 Of	fering ID 24151				
Plan. Start Date 08/02/2021 Plan. E	nd Date 02/04/2022				
Actual Start Date 08/02/2021 Actual E	ind Date				
Completed Successfully					
Next Contact Date 10/15/2021					
Program Service Type ITA-Training	~	Total Fun	ding \$ 1.00		Add Edit Delete
Part Time Learn. No 💙 Distanc	e Learn. No 🗸	Petiti	on #		
Program	~	RR Eve	ent#		✓
Minimum Hours Number o	fWeeks	Incumben	t Worker Training		
O*Net 51412200 Welding, Soldering, and Bra	azing Machine O*Net				
Provider Name	Service Nam	ne	Actual Start Dat	Actual End Dat	Program Svc Type
Modern Welding School, Inc.	Welding		08/02/2021		ITA-Training
Boys & Girls Club of Schenectady	Supportive Services - Ch	nild Care	08/02/2021	02/04/2022	Youth Services
<					>
Options Print List New Serv	ice Delete Service Au	thorization	IPA Service Summa	ry Payments	Tracking
Save Cust	omer Detail <u>C</u> omp Assess C	Comments C	heck Labor Market Ir	nformation	



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

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

Customer Coareb Customer Detail Comp Asses					
<u>customer search</u> customer betall comp Asses	s Se	rvices Li	nks Car	eerZone	NextGen
Parker, John SSN:	OSOS	5 ID: NY0151471	73		
Achievement Objectives Services Service History Enro	liments Outcom	nes Empl. Outcor	nes Trng. Out	comes Comn	nen > >>
Detail	Funding —				
Service Type Occupational Skills Training	Level	Source	Obligated A	ctual Obli	g #
Provider Name Modem Welding School, Inc.		Gun Violence Pre	§ 1.00 \$ 0.	.00	
Location Name Modem Welding School, Inc.					\sim
Provider ID 2165 Offering ID 24151					
Plan. Start Date 08/02/2021 Plan. End Date 02/04/2022					
Actual Start Date 08/02/2021 Actual End Date 02/04/2022					
Completed Successfully Yes 💙					
Next Contact Date 10/15/2021			_		
Program Service Type ITA-Training 🗸 🗸	Total Fund	ling \$ 1.00		Add Edit I	Delete
Part Time Learn. No 💙 Distance Learn. No 💙	Petitio	on #			
Program V	RR Ever	nt#		<u> </u>	
Minimum Hours Number of Weeks	Incumbent	Worker Training			
O*Net 51412200 Welding, Soldering, and Brazing Machine O*Net					
Provider Name Service N	lame	Actual Start Date	Actual End Dat	t Program	Svc Type
Modern Welding School, Inc. Welding		08/02/2021	02/04/2022	ITA-Training	
Boys & Girls Club of Schenectady Supportive Services	Child Care	08/02/2021	02/04/2022	Youth Service	es
4					>
Ontinge Drint List New Section Delate Service	Authorization	IDA Service Survey	Pauma ata	Tracking	
Options Frint List New Service Delete Service	Authonization	IFA Service Summar	y rayments	Tracking	
Save Save Mp Assess	Comments Ch	neck Labor Market In	formation		



OUTCOMES

Employment and training outcomes for GVP Local Initiative participants must be recorded in the Employment Outcomes and Training Outcomes tabs of OSOS.



Please note that if a participant is served solely under this initiative, the participants will not be counted in local performance measures and information entered in these tabs will not impact performance numbers. However, if the participant is co-enrolled in WIOA, they will be included in all applicable local and state performance measures. In this case, all outcome information must be entered per the <u>WIOA Performance</u> <u>Measures and Outcomes OSOS Guide</u>.

TRAINING OUTCOMES

When a participant has successfully completed training, it must be noted in the **Trng. Outcomes** tab in the **Services** window.

CUSTOMER	PROVIDER	EMPLOYE	R S	TAFF	HELP	
Customer Search	Customer Detail	Comp Assess	Services	Links	JobZone	NextGen
Parker, John		S SN:	OSOS ID: NY	016747525		
<< Achie vem ent Objec	ctives Services Servic	e History Enrollments	Outcomes Em	pl. Outcomes Trr	ng.Outcomes	Trng. Outcome
Training/Education				Created		
●Category	/	~		Sta	#	
●Туре	•	~	ł	310		
Enroll Date	Completi	on D ate		Unic	:е	
 Attainment Status 	ŧ	~		Dat	le	
Leads to Cred./Em pl					1.6 - 1	
Major/Program				Last Mo	amed	
Degree/Cert./Cred				Sta	ff	
School/Institute	•			Offic	e	
Seeker Service ID			Training Service	≝ Dat	te	
1	Гуре	School/Institute	En roll D ate	Atta	ainmentStatus	
✓.			_			
						\sim
		A				✓
			_			
	Add Outcome	Add Outco	ome Detail	s Print List		
	Save Customer Det	tai <u>C</u> om Assess Comm	ents Check Labo	r Market Information		

Click the **Add Outcome** button at the bottom of the screen.



Enter the **Category** and **Type** of the Credential earned due to the completed training.

Enter the **Enroll Date** and the **Completion Date** of the training.

Enter the Attainment Status of "Completed - attained intended credential."

Enter the **Certification Date**, the **Major/ Program**, the **Degree/Certificate/Credential** obtained, and the **School/Institute** which granted that credential.

Click Save.

CUSTOMER	PROVIDER	EMPLOYER	STAF	F	HELP	
Customer Search	Customer Detail	Comp Assess 🛛 🗧	Services	Links	JobZone	NextGen
Parker, John		S SN:	OSOS ID: NY016	747525		
< < Achie vem ent Objec	tives Services Service	History Enrollments	Outcomes Empl. O	utcomes Trns	g. Outcomes Co	m m e n > >>
Training/Education				Created		(
Category	Occ Skills/Advanced Training	· ~		Stat		
●Туре	Occupational Skills Certificate	· ·		5141		
Enroll Date	08/02/2021 Completion	D ate 02/04/2022		Опсе		
●Attainment Status	Completed - attained intende	ed oredential 🗸 🗸		D ate	•	
Certification Date	02/04/2022			<u> </u>		
Leads to Cred./Em pl.	Yes			Last Mod	lified	
●Major/Program	Welding			Staf	ff	
Degree/Cert./Cred.	Welding Certification		×	Office	•	
●School/Institute	Modem Welding			D ate	•	
Seeker Service ID			Training Services			
[т	ype	School/Institute	En roll D ate	Attai	inm ent Status	
✓ Occupational Skills Ce	rtificate	Modern Welding	08/02/2021 Co	mpleted - attaiı	ned intended cre	dential
						^
	Add Out time	Delete Outcome	Outcome Details	Print List		
		Assess Commer	nts Check Labor Ma	rket Information		



EMPLOYMENT OUTCOMES

When a participant obtains employment, this must be recorded in the **Empl. Outcomes** tab in the **Services** window of OSOS.

Click the **Add Outcome** button at the bottom of the screen.

CUSTOM	ER PROVIDER EMPLO	YER STAFF	HELP
Customer Search	Customer Detail Comp Assess	Services Links	s JobZone NextGen
Parker, John	S SN:	OSOS ID: NY016747525	
Achie vem ent	Objectives Services Service History Enrollm	ents Outcomes Empl. Outcomes	Trng. Outcomes Commen > >>
Employment			
			Characteristics
●Туре	Start D ate	End Date	
Em ployer EIN /ID	Employer Lookup 💌		N on-Traditional
EmployerName			Hired By Layoff 🗸
NAICS		NAICS Lool	FC JL Job 🗸
City	State	✓ Zip	Work Based
OSOS Job ID	External Job ID	Supervisor	Disaster Reliet V
Seeker Service ID		Employment Services	UICovered V
		Audit Manual Wages	Fringe Benefits
Start Date	EmployerName	Em ployer EIN/ID	NAICS
····			<u>^</u>
			✓
		Come petails Phint Lis	51
	Save Customer Detal Comp Assess C	Comments Check Labor Market Inform	nation



Required fields in this tab are **Type** and **Start Date**, but you should enter as much information as is known about the employment.

Please note the Characteristics section at the right of the screen. If the employment is related to training provided to the customer, remember to mark **Training Related** as **Yes**.

CUSTON	IER PROVIDER	EMPLOYER	STA	FF	HELP	
Customer Search	Customer Detail C	omp Assess 🛛 🗧	Services	Links	JobZone	en
Parker, John	S	SN:	OSOS ID: NY01	6747525		
< < Achie vem ent	Objectives Services Service H	istory Enrollments C	utcomes Empl.	Outcomes Tm	g.Outcomes Com	
- Employment						
●Type	Unsubsidized Employment 🗸 🔹 St	tart D ate 08/01/2021	EndDate		Characteristics	
SelfEm ployed	No 🗸				Non Tradifional	
Em ployer EIN /ID	Employer Lookup	•			Hired By Layoff	
EmployerName	Smith Welding				FC II. Joh	
NAICS	23819 Other Foundation, Struct	ture, and Building Exterior	Contract	NAICS Lookur	Work Based	
City	Albany	State New York	🗸 Zip	12205	Training	
OSOS Job ID	E xtern al Job ID	Super	visor		Disaster Relief	№ ✓
Seeker Service ID			Employmen	t Services	UICovered	№ ✓
			Audit Mar	iual Wages	Fringe Benefits	
Start Date	EmployerName	Em	ployer EIN /ID		NAICS	
Jan Date	L In proyer Name	L		erFoundation	Structure and Build	ing Exte
00/01/2021 51111	rweiding		01	ierr oundation,	Structure, and Build	
						×.
	Add Outcome	Delete Outcome	Outcome Details	Print List		
	Save Save	Assess Comment	s Check Labor M	arket Information		



When the participant wages are known, they must be entered into OSOS.

Click the Manual Wages button in the Employment Outcomes tab.

CUSTOM	ER PROVIDER	EMPLOYI	ER STA	\FF	HELP			
Customer Search	Customer Detail	Comp Assess	Services	📄 Links	JobZone			
		S SN:	OSOS ID: NYO	14381191				
<	Objectives Services Service	e History Enrollment	S Outcomes Empl	Outcomes Tr	ng.Outcomes Com	nen > >>		
Employment								
●Туре	Unsubsidized Employment 🗸	Start D ate 03/01/20	22 End Date		Characteristics	(X		
SelfEm ployed	~				Non Traditional			
EmployerEIN/ID	er EIN/ID Employer Lookup							
EmployerName	Smith Welding							
NAICS	23819 Other Foundation, S	ructure, and Building Ext	erior Contract	NAICS Lookup	Work Based			
C ity	Albany	State New York	✓ Zi	p 12205	Training	₩ ▼		
OSOS Job ID	External Job	ID S	upervisor		Disaster Relief	∿ ∨		
Seeker Service ID			Employme	nt Services	UICovered	₩ ♥		
			Audit Ma	nual Wages	Manual W	ages		
Start Date	EmployerNam	e	Em ployer EIN /ID		NAS	1		
✓ 03/01/2022 Smith	Welding		0	therFoundation	, Structure, and Build	ing Exte		
						^		
						\sim		
	AH 0	Delate Output	Concern Derate	Disting				
	Add Outcome		Uutcome Details	Print List				
	Save Customer Det	al <u>C</u> omp Assess Com	ments Check Labor I	Market Information	1			



This opens the **Manual Wages** webpage dialog. Click **Add** to open up the fields. Enter the date of the paycheck or wage earned. Enter the Salary Unit, the Salary per Unit, and the Number of Units. Click the **Calculate** button. Click the **OK** button.

Manual Wages We	bpage Dialog	×
ManualWages		
Em ployer EIN/ID Em ployer Nam e NAICS	Smith Welding Created 23819 Other Foundation, Structure, and Building Exterior Contract; Staff	
●Wage Eamed Date ●Salary Unit Salary per Unit	03/ 15/ 2022 Program Year 2021 Qtr 3 Hourly V \$ 22.00	
NumberofUnits ∙Manual Wage Amount ⊮ones	40.00 \$880.00 Calculate Calculate Office	
Attachment	Date	
Upload Downlo	ad Deface	
Wage Earned Date	Wage Amount Date Modified	
✓ <u>03/15/2022</u>		~

Remember to click **Save** at the bottom of the screen.

Statt Date	EmployerName	Em ployer EIN/ID	NAICS
03/02/2022 Smith W	/elding		Other Foundation, Structure, and Building E
	Add Outcome Delet	e Outcome Outcome Detail	s Print List
Cours	Sava Customer Detail Comp	Assars Commants Chark I abo	r Markat Information
Save	Save Costoner Detail Comp.	Gies Comments Check Lab	Market momation



RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found <u>on the NYS</u> <u>Department of Labor's website.</u>

For further assistance, please contact the OSOS Help Desk: By phone: (518) 457-6586 By email: <u>help.osos@labor.ny.gov</u>