

Documenting Dislocated Worker Status OSOS Guide



Table of Contents

Purpose	2
Searching for the Customer	3
Quick Search	4
Dislocated Worker	6
Category 1 - Dislocated Worker	7
Category 2 – DW Mass Layoff or Closure	14
Category 3 - DW Self-Employed.....	16
Category 4 - DW Displaced Homemaker	18
Category 5 - DW Spouse of a Member of the Armed Forces	21
Comments and Data Element Validation.....	23
Additional Categories.....	24
Resources and Assistance	26



PURPOSE

The definition of Dislocated Worker (DW) under Workforce Innovation and Opportunity Act (WIOA) Section 3(15) includes five (5) categories.

The five (5) WIOA DW categories are:

1. Category 1 - DW
2. Category 2 - DW Mass Layoff or Closure
3. Category 3 - DW Self-Employed
4. Category 4 - DW Displaced Homemaker
5. Category 5 - DW Spouse of a Member of the Armed Forces

Please refer to Program Guidance Letter (PGL) [#22-01](#) for New York State's interpretation of these DW definitions.

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.

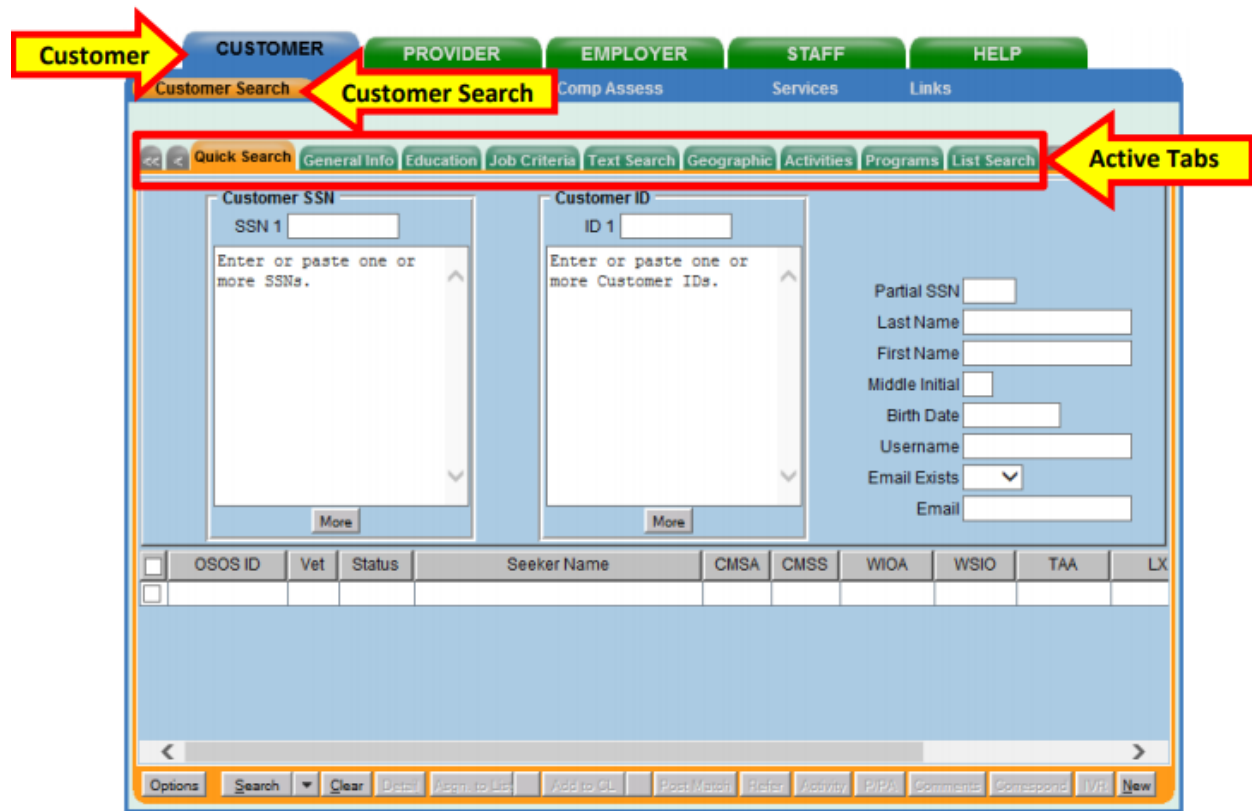
This guide provides instructions on how to properly document dislocated worker status in OSOS.

SEARCHING FOR THE CUSTOMER

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

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

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



QUICK SEARCH

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

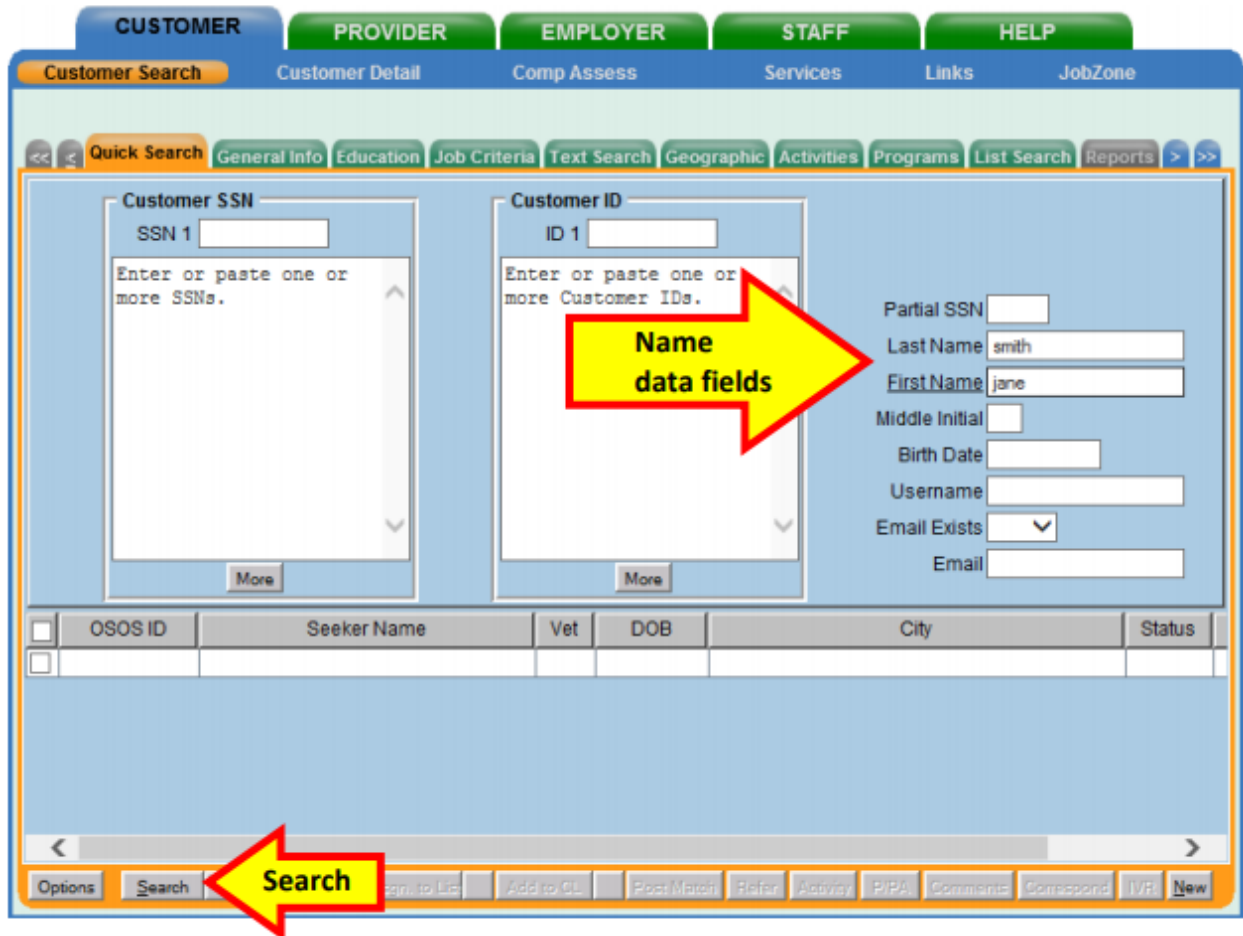
SEARCHING BY CUSTOMER FULL OR PARTIAL NAME

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



As a best practice, staff should perform a name search for any customer they are working with to determine if duplicate OSOS records exist for the same customer. Due to the potential impact on performance and funding, it is critical that data entry of services is entered in the correct record. If a duplicate record is found, please contact help.osos@labor.ny.gov.

Click the **Search** button.

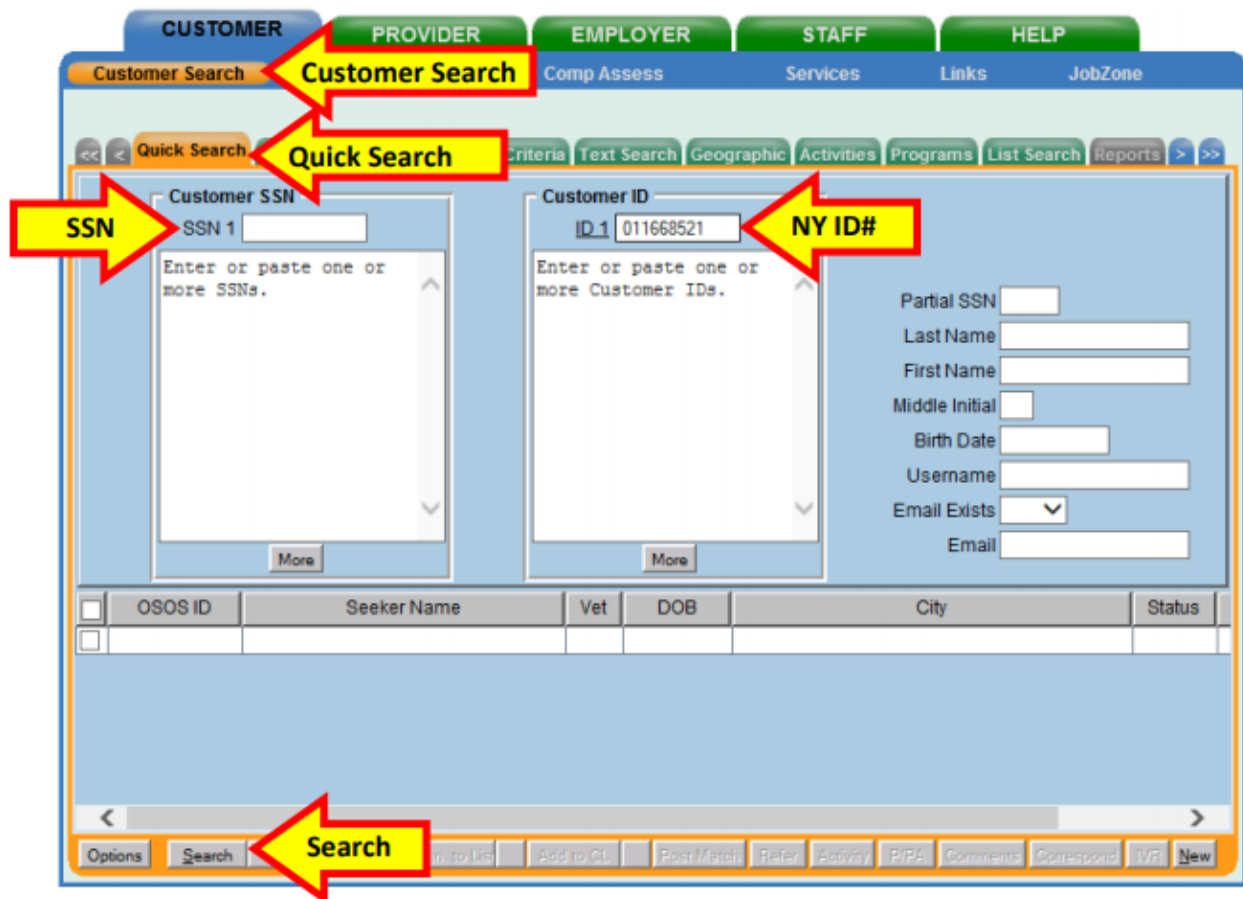


The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The 'Quick Search' sub-tab is selected. The interface contains several input fields: Customer SSN (SSN 1), Customer ID (ID 1), Partial SSN, Last Name (smith), First Name (jane), Middle Initial, Birth Date, Username, Email Exists (dropdown), and Email. A yellow arrow labeled 'Name data fields' points to the Last Name and First Name fields. At the bottom, a yellow arrow labeled 'Search' points to the Search button. Below the input fields is a table with columns: OSOS ID, Seeker Name, Vet, DOB, City, and Status. The table is currently empty.

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.



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.*

DISLOCATED WORKER

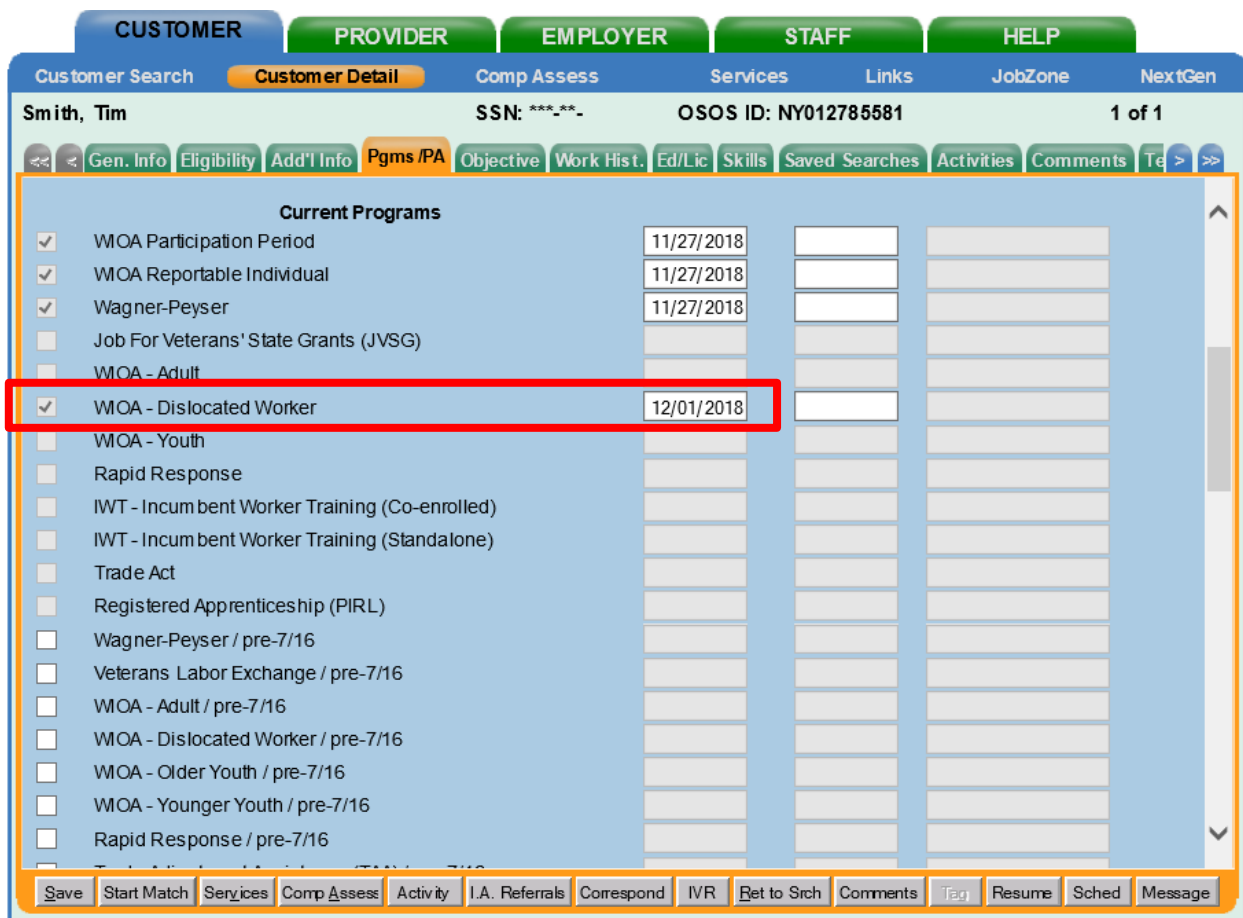
Dislocated Worker status is documented in the **Customer Detail** window, **Work History** tab of OSOS.



Staff must always review the entire OSOS record for accuracy at each customer interaction and update all tabs as appropriate.

Staff must review and update the record fully prior to entering activities or recording services in the customer record. This will cause the customer to be properly enrolled in the WIOA Dislocated Worker program upon first enrolling activity or service.

Enrollment information and date is visible in the **Customer Detail** window, **Pgms/PA** tab.



The screenshot shows the OSOS Customer Detail window for Tim Smith (SSN: ***-**-****, OSOS ID: NY012785581). The 'Pgms/PA' tab is selected, showing a list of 'Current Programs'. The 'WIOA - Dislocated Worker' program is checked and has a date of 12/01/2018. Other programs include WIOA Participation Period, WIOA Reportable Individual, Wagner-Peyser, Job For Veterans' State Grants (JVSG), WIOA - Adult, WIOA - Youth, Rapid Response, IWT - Incumbent Worker Training (Co-enrolled), IWT - Incumbent Worker Training (Standalone), Trade Act, Registered Apprenticeship (PIRL), Wagner-Peyser / pre-7/16, Veterans Labor Exchange / pre-7/16, WIOA - Adult / pre-7/16, WIOA - Dislocated Worker / pre-7/16, WIOA - Older Youth / pre-7/16, WIOA - Younger Youth / pre-7/16, and Rapid Response / pre-7/16.

Program	Start Date	End Date	Other
<input checked="" type="checkbox"/> WIOA Participation Period	11/27/2018		
<input checked="" type="checkbox"/> WIOA Reportable Individual	11/27/2018		
<input checked="" type="checkbox"/> Wagner-Peyser	11/27/2018		
<input type="checkbox"/> Job For Veterans' State Grants (JVSG)			
<input type="checkbox"/> WIOA - Adult			
<input checked="" type="checkbox"/> WIOA - Dislocated Worker	12/01/2018		
<input type="checkbox"/> WIOA - Youth			
<input type="checkbox"/> Rapid Response			
<input type="checkbox"/> IWT - Incumbent Worker Training (Co-enrolled)			
<input type="checkbox"/> IWT - Incumbent Worker Training (Standalone)			
<input type="checkbox"/> Trade Act			
<input type="checkbox"/> Registered Apprenticeship (PIRL)			
<input type="checkbox"/> Wagner-Peyser / pre-7/16			
<input type="checkbox"/> Veterans Labor Exchange / pre-7/16			
<input type="checkbox"/> WIOA - Adult / pre-7/16			
<input type="checkbox"/> WIOA - Dislocated Worker / pre-7/16			
<input type="checkbox"/> WIOA - Older Youth / pre-7/16			
<input type="checkbox"/> WIOA - Younger Youth / pre-7/16			
<input type="checkbox"/> Rapid Response / pre-7/16			



CATEGORY 1 - DISLOCATED WORKER

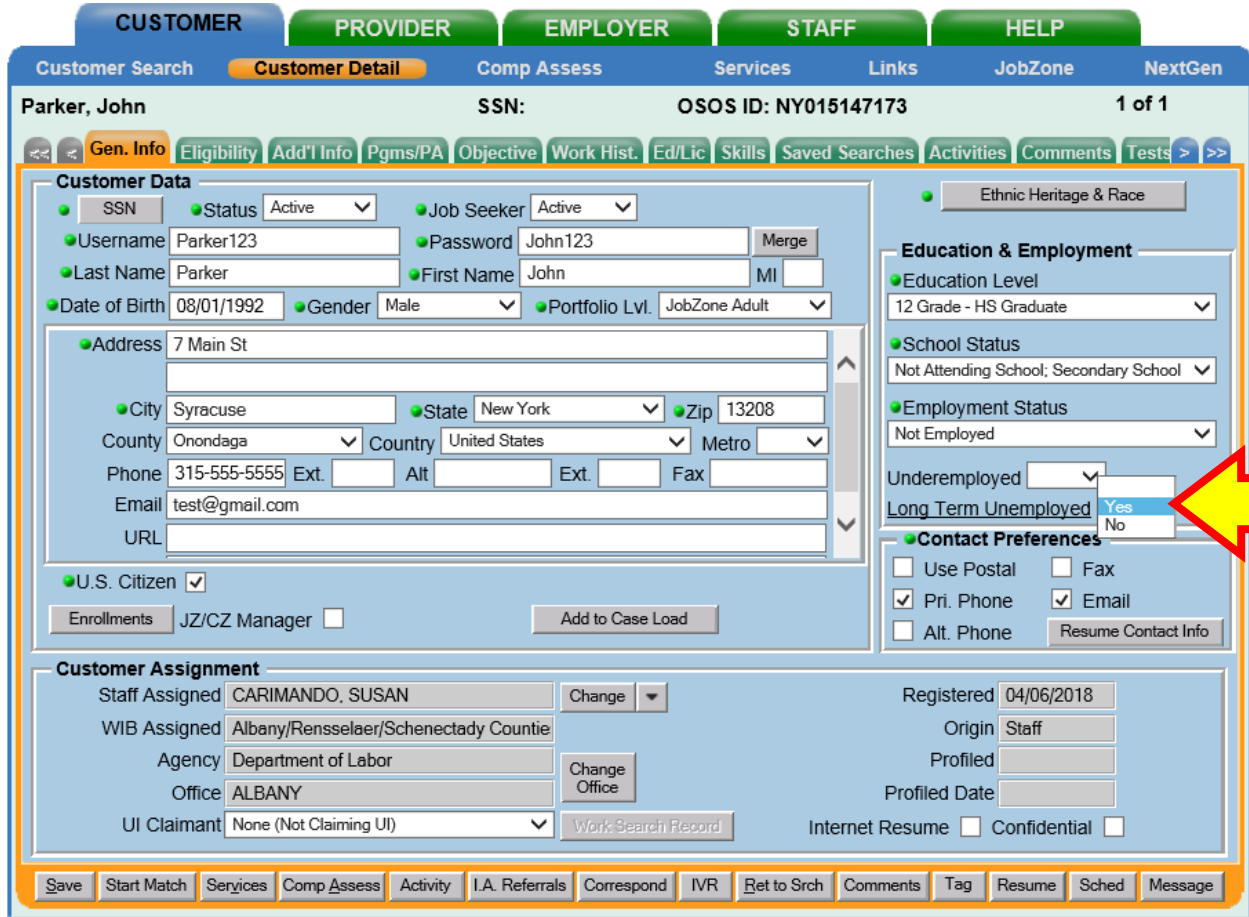
To properly document a dislocated worker, the **Work History** tab of the **Customer Detail** window must be completed. The customer's most recent job prior to the participation in the WIOA Dislocated Worker program must be recorded.

Category 1 - Dislocated Category includes customers who:

- have been separated or received notice of separation; and
- are eligible for or have exhausted Unemployment Insurance benefits, or who are not eligible for Unemployment Insurance, but have demonstrated their attachment to the workforce; and
- are unlikely to return to a previous industry or occupation.

This category will include long-term unemployed (LTU) individuals and underemployed individuals who have accepted stop-gap employment. Please refer to PGL #22-01 to identify if the customer you are working with can be classified as a Category 1 Dislocated Worker based on New York State's interpretation of the WIOA Dislocated Worker definitions.

For a customer who is considered a Category 1 Dislocated Worker due to long-term unemployment status, select **Yes** in the **Long-Term Unemployed** field in the **Gen. Info** tab.



The screenshot shows the OSOS Customer Detail form for John Parker. The 'Gen. Info' tab is active, and the 'Long Term Unemployed' field is set to 'Yes', indicated by a red arrow. The form includes sections for Customer Data, Education & Employment, and Customer Assignment.

Customer Data:

- SSN: [Redacted]
- Status: Active
- Job Seeker: Active
- Username: Parker123
- Password: John123
- Last Name: Parker
- First Name: John
- Date of Birth: 08/01/1992
- Gender: Male
- Portfolio Lvl: JobZone Adult
- Address: 7 Main St
- City: Syracuse
- State: New York
- Zip: 13208
- County: Onondaga
- Country: United States
- Phone: 315-555-5555
- Email: test@gmail.com
- U.S. Citizen:

Education & Employment:

- Education Level: 12 Grade - HS Graduate
- School Status: Not Attending School; Secondary School
- Employment Status: Not Employed
- Underemployed:
- Long Term Unemployed: Yes

Customer Assignment:

- Staff Assigned: CARIMANDO, SUSAN
- WIB Assigned: Albany/Rensselaer/Schenectady Counties
- Agency: Department of Labor
- Office: ALBANY
- UI Claimant: None (Not Claiming UI)
- Registered: 04/06/2018
- Origin: Staff
- Profiled: [Redacted]
- Profiled Date: [Redacted]
- Internet Resume: Confidential:



Staff must select **Category 1 DW** in the **Reason for Leaving** field to record that a customer falls under the Category 1 - Dislocated Category.
All other required fields in the **Work History** tab must also be completed.

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

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

Parker, John SSN: OSOS ID: NY015147173 1 of 1

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

Detail

Job Title: Database Administrators O*Net Titles O*Net Code: 15114100

Employer: Generated Systems, Inc. Include online Start Date: 06/21/2005 End Date: 05/16/2022

Address: 1 Main Street Supervisor: Phone: Ext: Wage: \$52.00 Hourly Hours/week: 40

City: East Greenbush **Reason for Leaving: Category 1-DW**

State: New York Zip: 12061 Job Duties: Support sales staff through coaching and training. Job Duties

Country: United States Job Type: Full Time RR Event#: Event

NAICS: 518210 Data Processing, Hosting, and Related Services NAICS Lookup

Dislocated Worker Information

Qualifying Dislocation Date: 05/16/2022 Tenure (months): 203

O*Net at Dislocation: 15114100 Database Administrators

NAICS: 518210 Data Processing, Hosting, and Related Services

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Database Administrators	Generated Systems, Inc.	East Greenbush	06/21/2005	05/16/2022

New Job Entry Delete Selection Audit

Save Start Match Services Comp Assess Activity I.A. Referrals Correspond IVR Ret to Srch Comments Te.g Resume Sched Message



Selecting Category-1 DW will open the Dislocated Worker Information section.
 In the **Qualifying Dislocation Date** field, enter the customer's last day of work.
 In the **Tenure** field, enter the number of months that customer was employed by their most recent employer.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

Parker, John SSN: OSOS ID: NY015147173 1 of 1

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

Detail

Job Title: Database Administrators O*Net Titles: O*Net Code: 15114100

Employer: Generated Systems, Inc. x Include online Start Date: 06/21/2005 End Date: 05/16/2022

Address: 1 Main Street Supervisor: Phone: Ext:

City: East Greenbush Wage: \$ 52.00 Hourly Hours/week: 40

State: New York Zip: 12061 Reason for Leaving: Category 1-DW

Country: United States Job Duties: Support sales staff through coaching and training. Provid Job Duties

Job Type: Full Time RR Event#: Event

NAICS: 518210 Data Processing, Hosting, and Related Services NAICS Lookup

Dislocated Worker Information

Qualifying Dislocation Date: 05/16/2022 Tenure (months): 203

O*Net at Dislocation: 15114100 Database Administrators

NAICS: 518210 Data Processing, Hosting, and Related Services

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Database Administrators	Generated Systems, Inc.	East Greenbush	06/21/2005	05/16/2022

New Job Entry Delete Selection Audit

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



For a customer who is considered a Category 1 Dislocated Worker due to being underemployed, select **Employed** in the **Employment Status** field and **Yes** in the **Underemployed** field in the **Gen. Info** tab.

The screenshot shows the OSOS Customer Detail form for John Parker. The 'Gen. Info' tab is active, and a yellow arrow points to the 'Employment Status' field, which is set to 'Employed'. Another yellow arrow points to the 'Underemployed' field, which is set to 'Yes'. The 'Customer Data' section includes fields for SSN, Status (Active), Job Seeker (Active), Username (Parker123), Password (John123), Last Name (Parker), First Name (John), Date of Birth (08/07/2006), Gender (Male), and Portfolio Lvl. (JobZone Adult). The 'Address' section includes 7 Main St, Syracuse, New York, 13208. The 'Customer Assignment' section shows Staff Assigned (CARIMANDO, SUSAN), WIB Assigned (Albany/Rensselaer/Schenectady Counties), Agency (Department of Labor), Office (ALBANY), and UI Claimant (None (Not Claiming UI)).

Field	Value
SSN	
Status	Active
Job Seeker	Active
Username	Parker123
Password	John123
Last Name	Parker
First Name	John
Date of Birth	08/07/2006
Gender	Male
Portfolio Lvl.	JobZone Adult
Address	7 Main St
City	Syracuse
State	New York
Zip	13208
County	Onondaga
Country	United States
Metro	
Phone	315-555-5555
Ext.	
Alt.	
Ext.	
Fax	
Email	test@gmail.com
URL	
U.S. Citizen	<input checked="" type="checkbox"/>
Enrollments	JZ/CZ Manager <input type="checkbox"/>
Add to Case Load	<input type="button" value="Add to Case Load"/>
Staff Assigned	CARIMANDO, SUSAN
Change	<input type="button" value="Change"/>
WIB Assigned	Albany/Rensselaer/Schenectady Counties
Agency	Department of Labor
Change Office	<input type="button" value="Change Office"/>
Office	ALBANY
UI Claimant	None (Not Claiming UI)
Work Search Record	<input type="button" value="Work Search Record"/>
Registered	04/06/2018
Origin	Staff
Profiled	
Profiled Date	
Internet Resume	<input type="checkbox"/>
Confidential	<input type="checkbox"/>



For underemployed individuals, create two entries in the **Work History** tab. One entry must reflect the stopgap employment obtained. For this entry, leave the **End Date** field blank and select **Still Employed** in the **Reason for Leaving** field.

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

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

Parker, John **SSN:** **OSOS ID: NY015147173** **1 of 1**

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

Detail

Job Title: Retail Sales O*Net Titles O*Net Code: 41203100

Employer: ABC Computer Store Include online Start Date: 07/01/2022 End Date:

Address: 99 Second Street Supervisor: Phone: Ext.:

City: East Greenbush Wage: \$ 17.00 Hourly Hours/week: 40

State: New York Zip: Reason for Leaving: Still employed

Country: United States Job Duties: Assist customers on the sales floor. Job Duties

Job Type: Full Time RR Event#: Event

NAICS: NAICS Lookup

	Job	Company	City	Start	End
<input type="checkbox"/>	Database Administrator	ABC Solutions	East Greenbush	06/21/2015	05/16/2022
<input checked="" type="checkbox"/>	Retail Sales	ABC Computer Store	East Greenbush	07/01/2022	

New Job Entry Delete Selection Audit

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

The second work history entry must reflect the employment that the customer was displaced from prior to accepting stop-gap employment. Staff must select **Category 1 DW** in the **Reason for Leaving** field and fill out all required fields in the **Dislocated Worker Information** section.

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

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

Parker, John SSN: OSOS ID: NY015147173 1 of 1

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

Detail

Job Title: Database Administrator O*Net Titles O*Net Code: 15114100

Employer: ABC Solutions Include online Start Date: 06/21/2015 End Date: 05/16/2022

Address: 1 Main Street Supervisor: Phone: Ext: Wage: \$ 80000.00 Yearly Hours/week: 40

City: East Greenbush Reason for Leaving: Category 1-DW

State: New York Zip: 12061 Job Duties: Supported database systems and Job Duties

Country: United States Job Type: Full Time RR Event#: Event

NAICS: 518210 Data Processing, Hosting, and Related Services NAICS Lookup

Dislocated Worker Information

Qualifying Dislocation Date: 05/16/2022 Tenure (months): 83

O*Net at Dislocation: 15114100 Database Administrators

NAICS: 518210 Data Processing, Hosting, and Related Services

	Job	Company	City	Start	End
<input checked="" type="checkbox"/>	Database Administrator	ABC Solutions	East Greenbush	06/21/2015	05/16/2022
<input type="checkbox"/>	Retail Sales	ABC Computer Store	East Greenbush	07/01/2022	

New Job Entry Delete Selection Audit

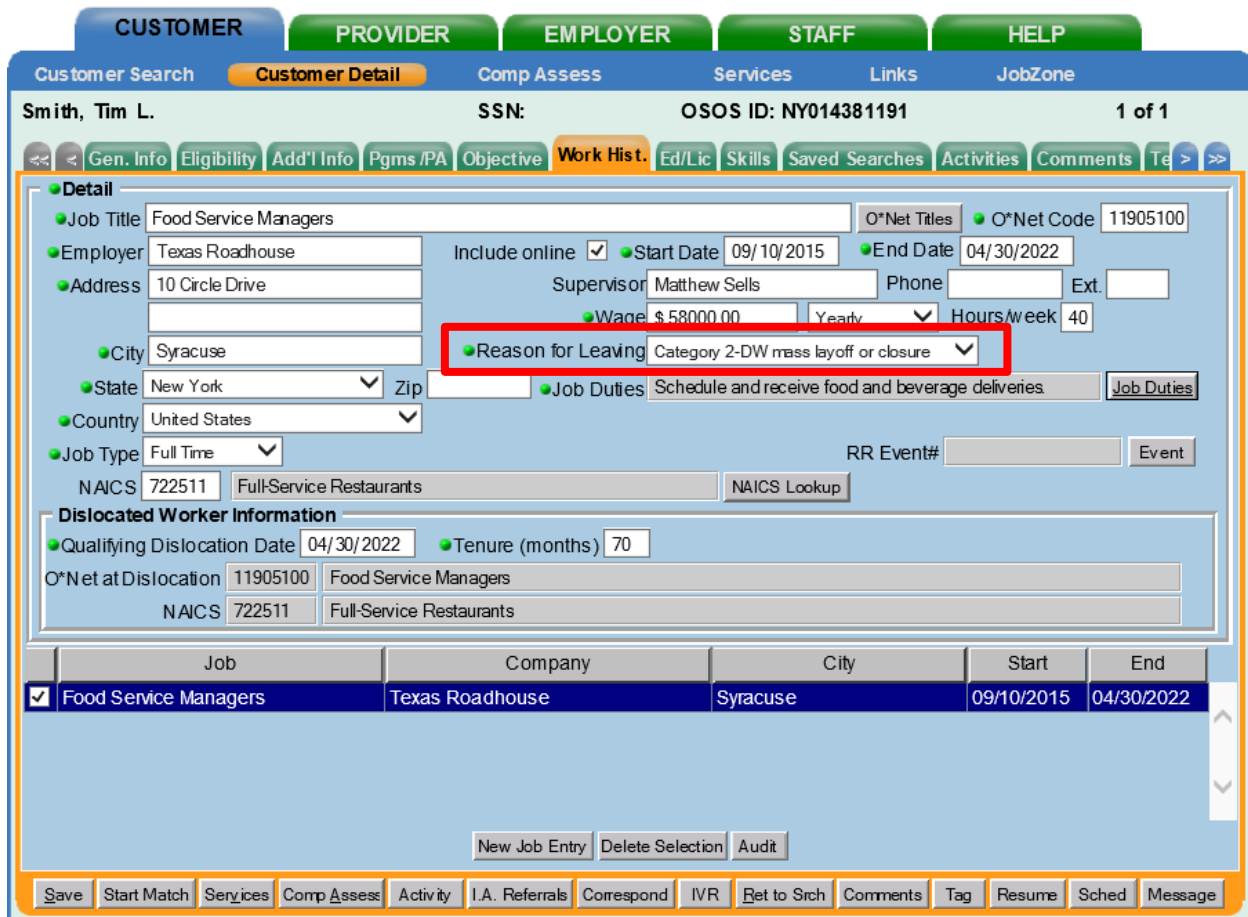
Save Start Match Services Comp Assess Activity I.A. Referrals Correspond IVR Ret to Srch Comments Tag Resume Sched Message



These extra steps are only required when the only way the customer qualifies as a Category 1 - DW is due to underemployment.

CATEGORY 2 – DW MASS LAYOFF OR CLOSURE

In the **Work History** tab, staff must select **Category 2 DW Mass Layoff or Closure** in the **Reason for Leaving** field when a customer has been terminated or laid off, or has received a notice of termination or layoff, from employment because of a permanent closure or any substantial layoff at, a plant, facility, military installation, or enterprise.



The screenshot shows the OSOS interface for a customer named Smith, Tim L. The 'Work Hist.' tab is active, and the 'Reason for Leaving' dropdown menu is highlighted with a red box, showing 'Category 2-DW mass layoff or closure' selected. The job details include:

- Job Title: Food Service Managers
- Employer: Texas Roadhouse
- Address: 10 Circle Drive
- City: Syracuse
- State: New York
- Country: United States
- Job Type: Full Time
- Start Date: 09/10/2015
- End Date: 04/30/2022
- Wage: \$58000.00
- Hours/week: 40
- Reason for Leaving: Category 2-DW mass layoff or closure
- Job Duties: Schedule and receive food and beverage deliveries

The 'Dislocated Worker Information' section shows:

- Qualifying Dislocation Date: 04/30/2022
- Tenure (months): 70
- O*Net at Dislocation: 11905100
- NAICS: 722511

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Food Service Managers	Texas Roadhouse	Syracuse	09/10/2015	04/30/2022



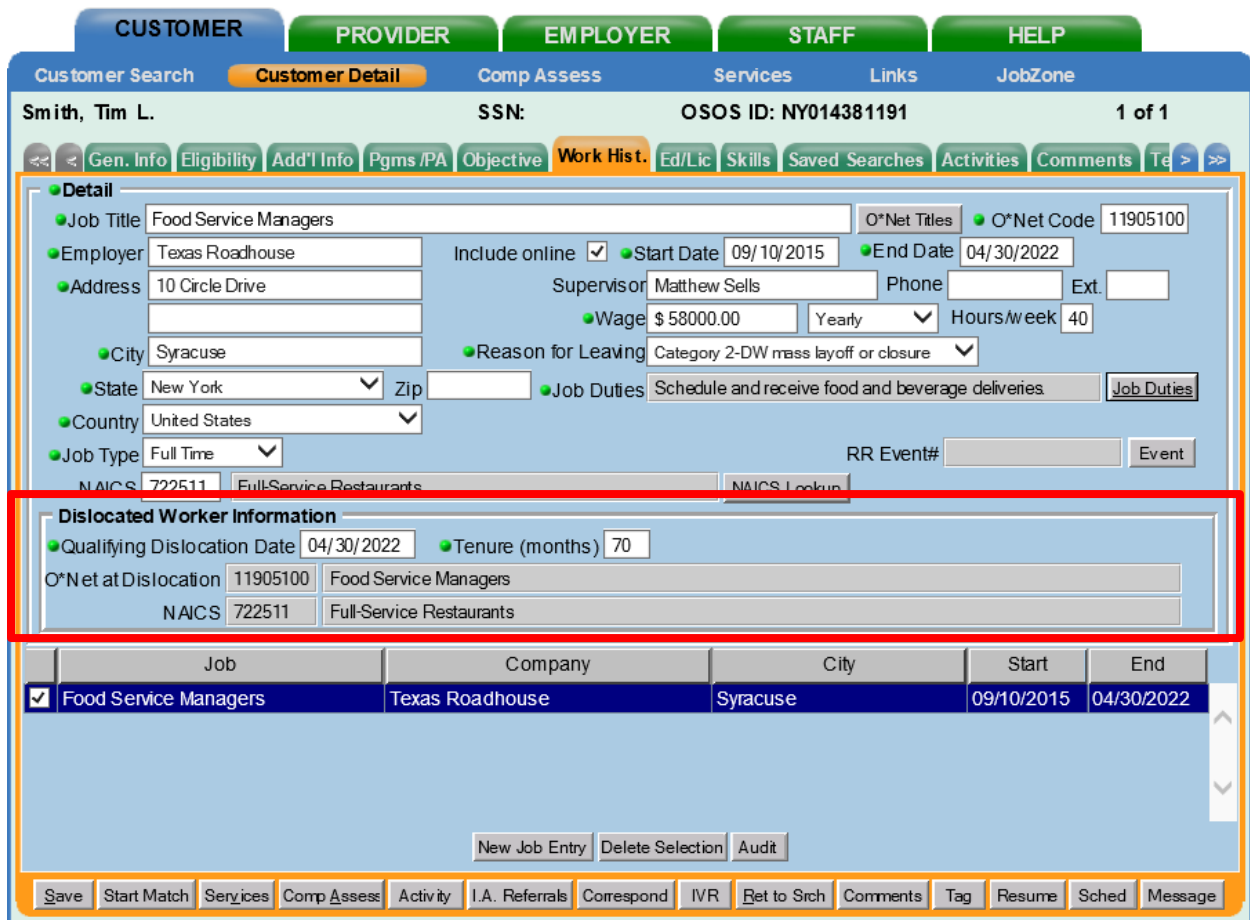
For customers who are still employed and received a notice of termination, enter the Qualifying Dislocation Date and End Date of employment indicated in the letter, and update the Employment Status on the General info tab to Employed - Rcvd Notice of Termination. If there is no date indicated in the letter, enter the date the letter was received as the Qualifying Dislocation Date and the End Date of employment.

All other required fields in the **Work History** tab must also be completed.

Selecting **Category-2 DW mass layoff or closure** will open the Dislocated Worker Information section.

In the **Qualifying Dislocation Date** field, enter the customer's last day of work.

In the **Tenure** field, enter the number of months that customer was employed by their most recent employer.



The screenshot shows the OSOS system interface with the 'Work Hist.' tab selected. The 'Dislocated Worker Information' section is highlighted with a red box. Below is a table of the job history data shown in the interface.

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Food Service Managers	Texas Roadhouse	Syracuse	09/10/2015	04/30/2022



CATEGORY 3 - DW SELF-EMPLOYED

Staff must select **Category 3 DW Self-Employed** in the **Reason for Leaving** field when a customer who was self-employed is now unemployed as a result of general economic conditions in the individual's community or because of natural disasters.

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

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

Smith, Tim L. SSN: OSOS ID: NY014381191 1 of 1

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

Detail

Job Title: Farmworkers and Laborers, Crop O*Net Titles O*Net Code: 45209202

Employer: Self-Employed Include online Start Date: 03/01/2001 End Date: 06/03/2022

Address: 16 Johnson St. Supervisor: Phone: Ext: Wage: \$92000.00 Yearly Hours/week: 40

City: Hauppauge **Reason for Leaving: Category 3-DW self-employed**

State: New York Zip: Job Duties: Owner/ Operator and managed dairy farm and greenhouse. Job Duties

Country: United States Job Type: Full Time RR Even#: Event

NAICS: 1121 Cattle Ranching and Farming NAICS Lookup

Dislocated Worker Information

Qualifying Dislocation Date: 06/03/2022 Tenure (months): 255

O*Net at Dislocation: 45209202 Farmworkers and Laborers, Crop

NAICS: 1121 Cattle Ranching and Farming

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Farmworkers and Laborers, Crop	Self-Employed	Hauppauge	03/01/2001	06/03/2022

New Job Entry Delete Selection Audit

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



All other required fields in the **Work History** tab must also be completed.

Selecting **Category-3 DW self-employed** will open the Dislocated Worker Information section.

In the **Qualifying Dislocation Date** field, enter the customer's last day of work.

In the **Tenure** field, enter the number of months that customer was self-employed.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links JobZone

Smith, Tim L. SSN: OSOS ID: NY014381191 1 of 1

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

Detail

Job Title: Farmworkers and Laborers, Crop O*Net Titles O*Net Code: 45209202

Employer: Self-Employed Include online Start Date: 03/01/2001 End Date: 06/03/2022

Address: 16 Johnson St. Supervisor: Phone: Ext:

City: Hauppauge Wage: \$92000.00 Yearly Hours/week: 40

State: New York Reason for Leaving: Category 3-DW self-employed

Country: United States Job Duties: Owner/ Operator and managed dairy farm and greenhouse. Job Duties

Job Type: Full Time RR Even#: Event

NAICS: 1121 Cattle Ranching and Farming NAICS Lookup

Dislocated Worker Information

Qualifying Dislocation Date: 06/03/2022 Tenure (months): 255

O*Net at Dislocation: 45209202 Farmworkers and Laborers, Crop

NAICS: 1121 Cattle Ranching and Farming

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Farmworkers and Laborers, Crop	Self-Employed	Hauppauge	03/01/2001	06/03/2022

New Job Entry Delete Selection Audit

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



CATEGORY 4 - DW DISPLACED HOMEMAKER

Staff must select **Category 4 DW Displaced Homemaker** in the **Reason for Leaving** field when a customer is an individual who has been providing unpaid services to family members in the home and who either

- has been dependent on the income of another family member but is no longer supported by that income; or
- is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of a deployment, a call or order to active duty, a permanent change of station, or the service-connected death or disability of the member;
- and is now unemployed or underemployed and is having trouble in obtaining or upgrading employment.

For a customer who is considered a Category 4 DW due to underemployed status, select **Employed** in the **Employment Status** field and **Yes** in the **Underemployed** field in the **Gen. Info** tab.

The screenshot shows the OSOS Customer Detail form for Samantha L. Sears. The form is divided into several sections:

- Customer Data:** Includes fields for SSN, Status (Active), Job Seeker (Active), Username (msskv3412), Password (password1), Last Name (Sears), First Name (Samantha), Date of Birth (07/01/1975), Gender (Female), Portfolio Lvl. (Young Adult), Address (123 Test Way), City (Albany), State (New York), Zip (12193), County (Albany), Country (United States), Metro, Phone, Email, and URL.
- Education & Employment:** Includes Education Level (12 Grade - HS Graduate), School Status (Not Attending School, Secondary Scho), Employment Status (Employed), Underemployed (Yes), and Long Term Unemployed (No).
- Contact Preferences:** Includes checkboxes for Use Postal, Fax, Pri. Phone, Email, and Alt Phone.
- Customer Assignment:** Includes Staff Assigned (TCC, Add), WIB Assigned (NYS DOL - CO), Agency (Department of Labor), Office (OSOS/REOS Central Support Unit), UI Claimant (Seek (Subject to Work Search)), Registered (08/04/2015), Origin (Staff), Profiled, Profiled Date, Internet Resume (checked), and Confidential (unchecked).



In the **Job Title** field, enter Homemaker.

In the **Employer, Address, City** and **State** fields, enter the customer's name and address. If the customer is underemployed or working part time, enter the employment information in a separate work history entry.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links JobZone

Sears, Samantha L. SSN: OSOS ID: NY014381191 1 of 1

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

Detail

Job Title: Homemaker O*Net Titles: O*Net Code: []

Employer: Samantha Sears Include online Start Date: 11/15/2011 End Date: 05/25/2022

Address: 1652 Reynolds Ave Supervisor: [] Phone: [] Ext: []

City: Syracuse Reason for Leaving: Category 4-DW displaced homemaker

State: New York Wage: \$ 0.01 Other: [] Hours/week: 40

Country: United States Job Duties: Homemaker

Job Type: Full Time RR Even#: [] Event: []

NAICS: [] NAICS Lookup: []

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Homemaker	Samantha Sears	Syracuse	11/15/2011	05/25/2022

New Job Entry Delete Selection Audit

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



As Category 4 Dislocated Workers have provided unpaid services, enter **\$0.01** and **Other** in the **Wage** fields.

All other required fields in the **Work History** tab must also be completed.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links JobZone

Sears, Samantha L. SSN: OSOS ID: NY013317550 1 of 1

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

Detail

Job Title: Homemaker O*Net Titles: O*Net Code:

Employer: Samantha Sears Include online: Start Date: 11/15/2011 End Date: 05/25/2022

Address: 1652 Reynolds Ave Supervisor: Phone: Ext:

City: Syracuse

State: New York Zip: 12240

Country: United States

Job Type: Full Time

NAICS: NAICS Lookup:

RR Event#: Event:

Wage: \$ 0.01 Other: Hours/week:

Reason for Leaving: Category 4-DW displaced homemaker

Job Duties: Successfully managed six person household. Planned and p Job Duties

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Homemaker	Samantha Sears	Syracuse	11/15/2011	05/25/2022

New Job Entry Delete Selection Audit

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

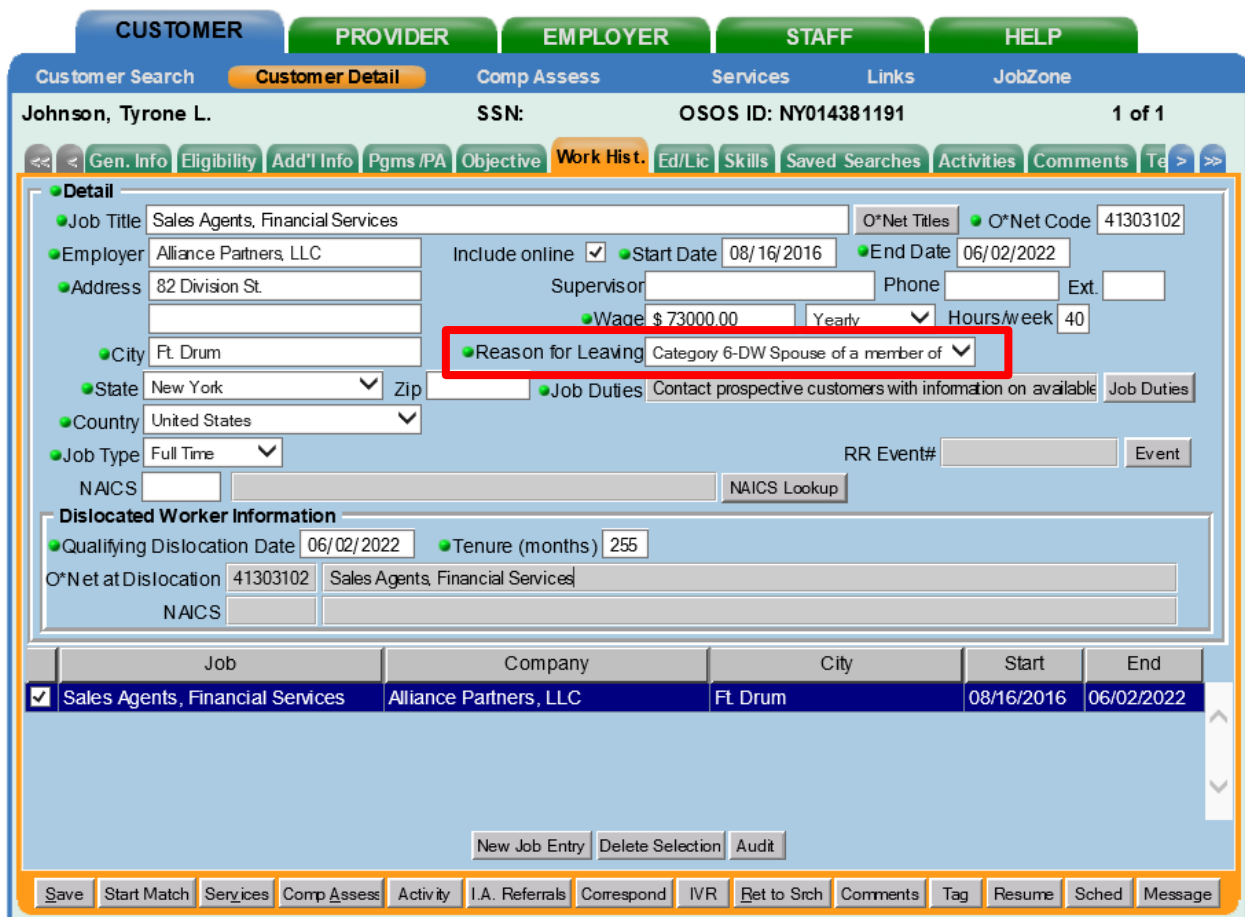
CATEGORY 5 - DW SPOUSE OF A MEMBER OF THE ARMED FORCES

Staff must select **Category 6 DW Spouse of a Member of the Armed Forces** in the **Reason for Leaving** field when a customer is either

- the spouse of a member of the Armed Forces on active duty, and who has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such member; or
- the spouse of a member of the Armed Forces on active duty and who meets required WIOA criteria.



WIOA defines Dislocated Worker - Spouse of a Member of the Armed Forces as Category 5. However, OSOS currently lists this as Category 6; this is the option which must be selected for customers meeting the above definition.



CUSTOMER | PROVIDER | EMPLOYER | STAFF | HELP

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

Johnson, Tyrone L. | SSN: | OSOS ID: NY014381191 | 1 of 1

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

Detail

Job Title: Sales Agents, Financial Services | O*Net Titles | O*Net Code: 41303102

Employer: Alliance Partners, LLC | Include online | Start Date: 08/16/2016 | End Date: 06/02/2022

Address: 82 Division St. | Supervisor: | Phone: | Ext: |

City: Ft. Drum | Wage: \$ 73000.00 | Yearly | Hours/week: 40

State: New York | Zip: | Job Duties: Contact prospective customers with information on available | Job Duties

Country: United States | Job Type: Full Time | RR Event#: | Event

NAICS: | NAICS Lookup

Dislocated Worker Information

Qualifying Dislocation Date: 06/02/2022 | Tenure (months): 255

O*Net at Dislocation: 41303102 | Sales Agents, Financial Services

NAICS: |

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Sales Agents, Financial Services	Alliance Partners, LLC	Ft. Drum	08/16/2016	06/02/2022

New Job Entry | Delete Selection | Audit

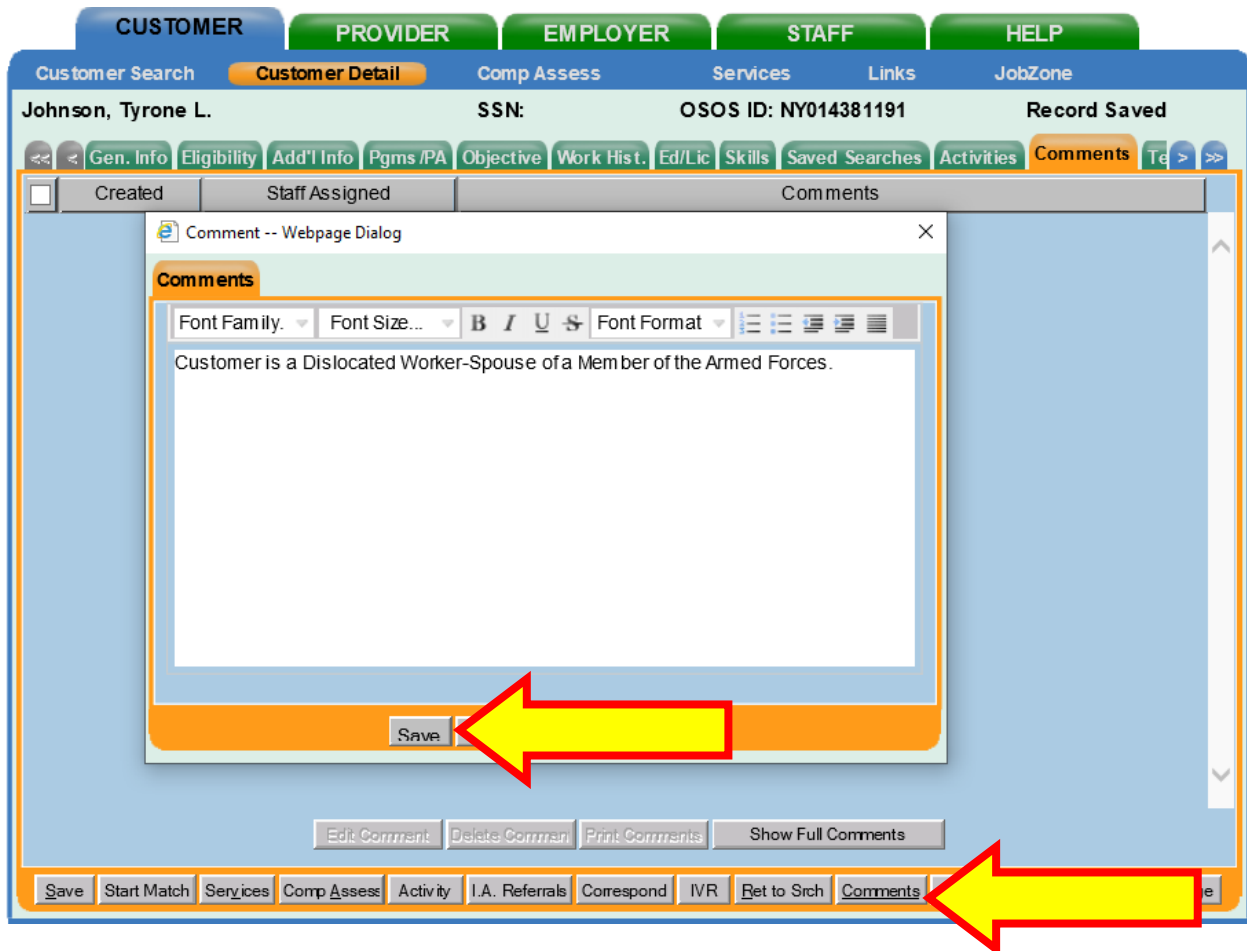
Save | Start Match | Services | Comp Assess | Activity | I.A. Referrals | Correspond | IVR | Ret to Srch | Comments | Tag | Resume | Sched | Message

All other required fields in the **Work History** tab must also be completed.

Click the **Comments** button at the bottom of the screen to record a comment indicating how this customer meets the WIOA definition of a Category 5 Dislocated Worker. This comment should include the following language:

"Customer is a Dislocated Worker-Spouse of a member of the Armed Forces."

Click **Save**.

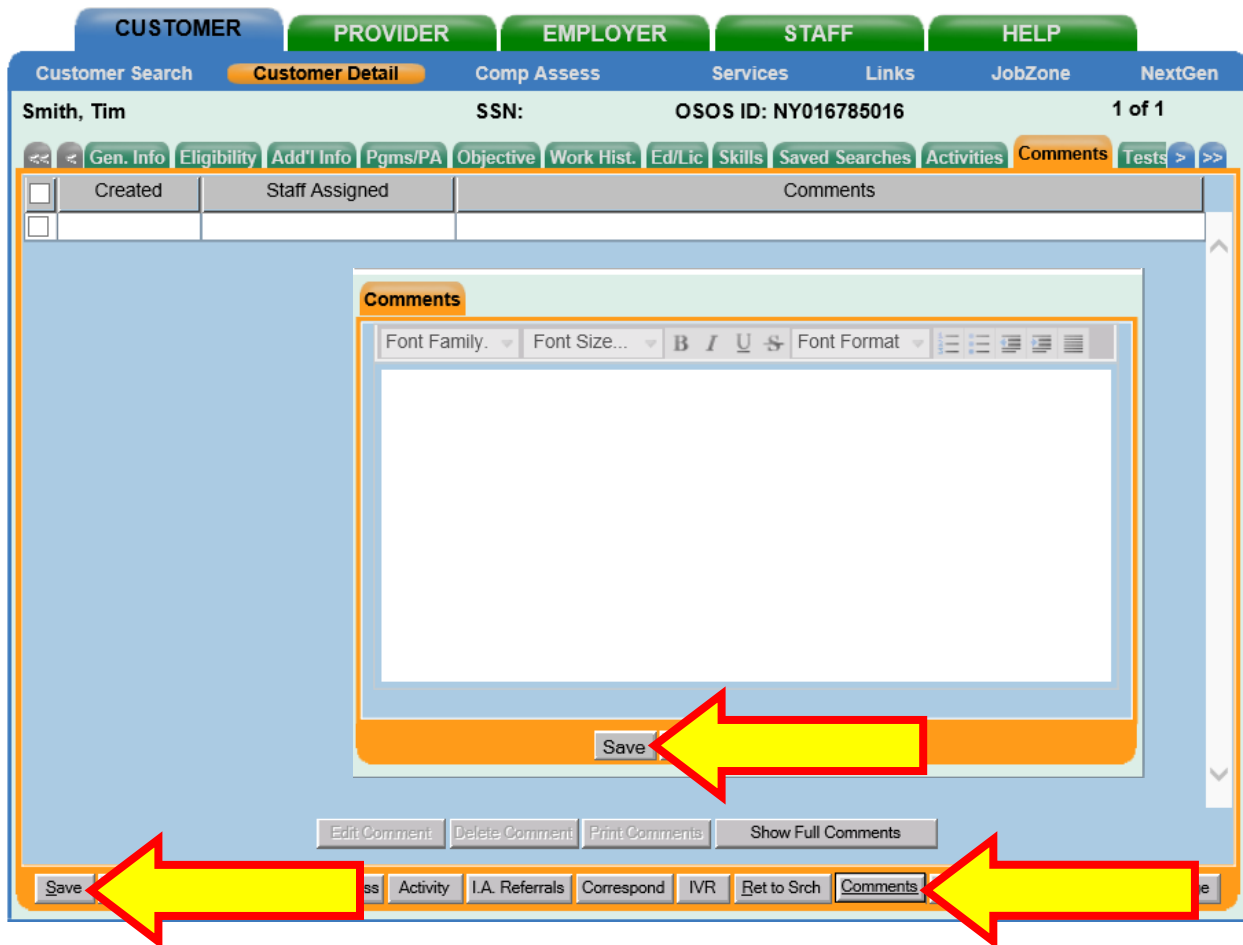


COMMENTS AND DATA ELEMENT VALIDATION

For all dislocated worker customers, staff case notes must include a comment indicating how this customer meets the WIOA definition of the selected category of dislocated worker. The comment should also include any necessary information on required data element validation.

To record a comment, click the **Comments** button at the bottom of the screen.

After typing the comment into the Comment box, click **Save** on the Comment box and at the bottom of the record.



The screenshot displays the OSOS Customer Detail interface for 'Smith, Tim'. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a secondary menu with options like Customer Search, Customer Detail, Comp Assess, Services, Links, JobZone, and NextGen. The customer's SSN and OSOS ID (NY016785016) are visible. A series of tabs allows navigation between different data sections: Gen. Info, Eligibility, Add'l Info, Pgms/PA, Objective, Work Hist., Ed/Lic, Skills, Saved Searches, Activities, Comments, and Tests. The 'Comments' tab is active, showing a text input area with a rich text editor toolbar (Font Family, Font Size, Bold, Italic, Underline, Link, Font Format) and a 'Save' button. A red arrow points to this 'Save' button. At the bottom of the screen, a navigation bar contains buttons for 'Save', 'Activity', 'I.A. Referrals', 'Correspond', 'IVR', 'Ret to Srch', and 'Comments'. Red arrows point to the 'Save' and 'Comments' buttons in this bar.



ADDITIONAL CATEGORIES

In addition to the WIOA DW categories, NYSDOL also recognizes individuals dislocated due to Foreign Trade as dislocated workers. This includes participants in the Trade Adjustment Assistance (TAA) Program who are part of a worker group covered under a certified trade petition.

In OSOS, these customers are documented as **Category 5-DW Dislocated Due to Foreign Trade** in the **Work History** tab.

For detailed guidance on entering TAA eligible dislocated workers in OSOS, please see the [TAA Intake and Eligibility OSOS Guide](#).

The screenshot shows the OSOS Customer Detail page for Samantha L. Sears. The 'Work Hist.' tab is selected, and the 'Reason for Leaving' dropdown menu is highlighted with a red box, showing the selected option: 'Category 5-DW Dislocated due to foreign'. Below the form is a table of job history.

Job	Company	City	Start	End	
<input checked="" type="checkbox"/>	Manufacturing Production Technician	Alliance Manufacturing	Old Town	08/16/2016	06/02/2022



Properly documenting Category DW-5 in the **Work History** tab and recording the TAA Individual Employment Plan per the guidance in the [TAA Enrollment and Entering the First Service OSOS Guide](#) will cause the customer to be co-enrolled in both the TAA program and the WIOA Dislocated Worker program.

Current Programs			
<input checked="" type="checkbox"/>	WIOA Participation Period	05/13/2022	
<input checked="" type="checkbox"/>	WIOA Reportable Individual	04/20/2022	
<input checked="" type="checkbox"/>	Wagner-Peyser	05/13/2022	
<input type="checkbox"/>	Job For Veterans' State Grants (JVSG)		
<input type="checkbox"/>	WIOA - Adult		
<input checked="" type="checkbox"/>	WIOA - Dislocated Worker	05/26/2022	
<input type="checkbox"/>	WIOA - Youth		
<input type="checkbox"/>	Rapid Response		
<input type="checkbox"/>	IWT - Incumbent Worker Training (Co-enrolled)		
<input type="checkbox"/>	IWT - Incumbent Worker Training (Standalone)		
<input checked="" type="checkbox"/>	Trade Act	06/08/2022	
<input type="checkbox"/>	Registered Apprenticeship (PIRL)		
<input type="checkbox"/>	Rapid Response / pre-7/16		
<input type="checkbox"/>	Stimulus Summer Youth		
<input type="checkbox"/>	Welfare (WTW)		
<input type="checkbox"/>	NFJP - National Farmworker Jobs Program (PIRL)		
<input type="checkbox"/>	NFJP E & T (PIRL)		
<input type="checkbox"/>	NFJP Housing Grant (PIRL)		
<input type="checkbox"/>	WRED		
<input type="checkbox"/>	WVDP - Homeless Veterans Reintegration Program (PIRL)		



RESOURCES AND ASSISTANCE

OSOS Guides:

- [Creating a Basic Customer Record OSOS Guide](#)
- [TAA Intake and Eligibility OSOS Guide](#)
- [TAA Enrollment and Entering the First Service OSOS Guide](#)

PGL #[22-01](#): New York State Department of Labor (NYSDOL) guidance and interpretation on the Workforce Innovation and Opportunity Act (WIOA) definition of Dislocated Worker (DW) and recording DWs in the One-Stop Operating System (OSOS)

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: help.osos@labor.ny.gov