

# Attachments Tab PTR Guide



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## PURPOSE

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 regarding the use of the Attachments tab in OSOS. It will list which documents staff may upload into the Attachments tab, detail the settings necessary for browser compatibility with the Attachments tab, and provide instructions for attachment upload.

## ATTACHMENT TAB POLICIES

The Attachments tab provides a method for staff to attach certain relevant documents to the record for their WIOA Adult, Dislocated Worker, and Youth customers.

NYSDOL recently expanded the option for youth providers to upload documents to the Attachment tab. Any documents that do not fit the category, must be retained as a hard copy file, as required.

The documents listed below are the only documents that may be uploaded into the Attachments tab.

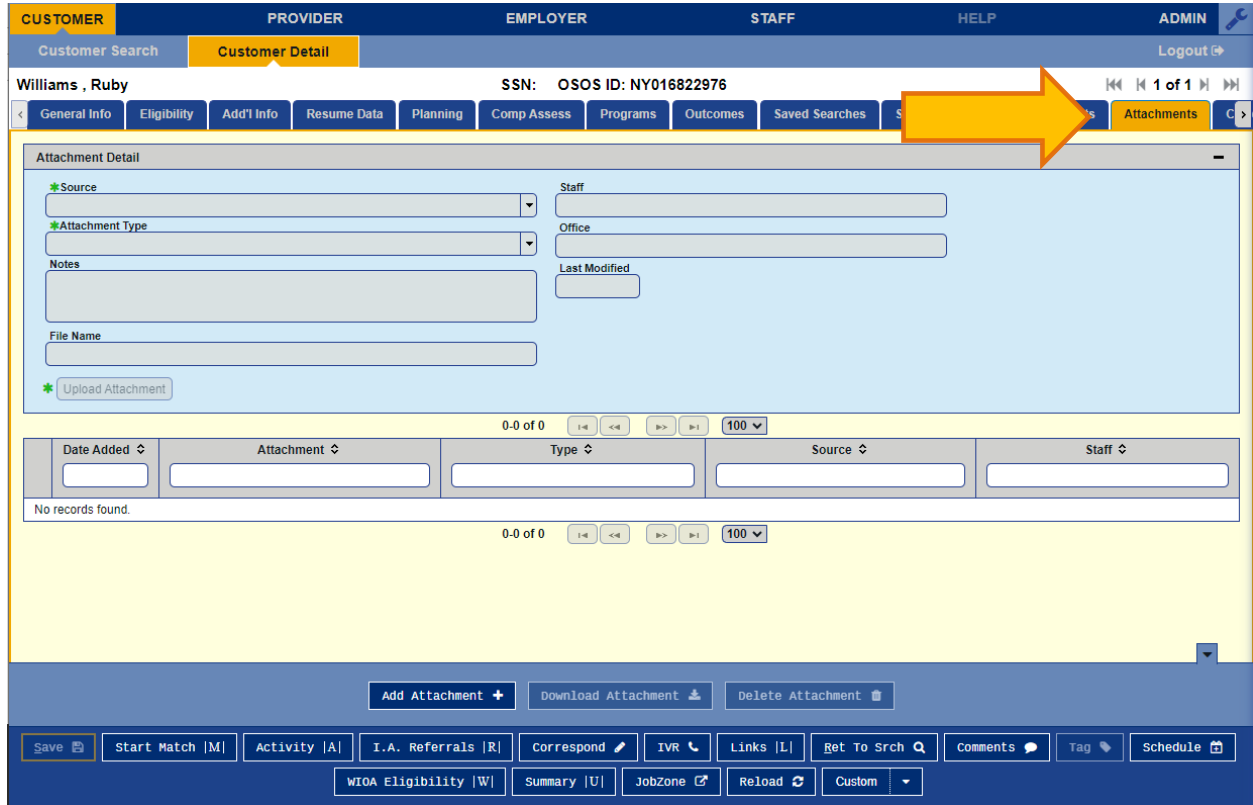
- RESEA Program Documents, including the Eligibility Questionnaire and Re-Employment Plan
- WIOA Release of Information form
- ES 102 Career Services Eligibility Survey
- Individual Employment Plan (IEP)
- Equal Opportunity is the Law, Civil Rights and Grievance Procedures documents
- Documents to validate date of birth:
  - State-issued photo ID
  - Birth certificate
- DEV
  - Veteran Status
  - Public Assistance
- Documents related to training:
  - Proof of training credential / MSG, including diploma, certificate, license, school transcript
- Military Service Questionnaire
- Youth Intake and Eligibility Determination
- WIOA SYEP Documentation
- Disruptive Customer Documentation



*Staff must never upload information related to medical history / status or legal issues into the Attachments tab. Only information directly related to a customer's employment and training needs may be housed in OSOS.*

## UPLOADING ATTACHMENTS IN PTR

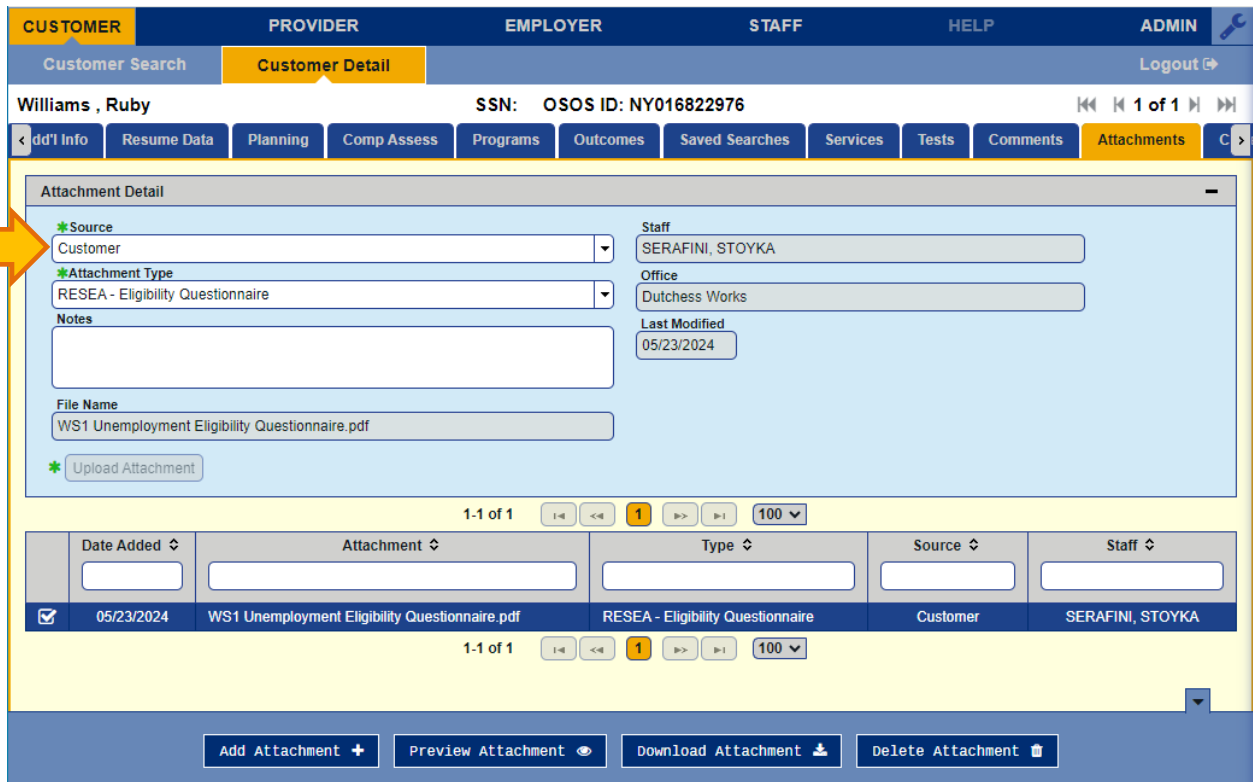
The **Attachments** tab is located in the **Customer** module, **Customer Detail** window of PTR.



The screenshot displays the OSOS PTR interface for a customer named Williams, Ruby. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP, and ADMIN. The main navigation bar shows tabs for Customer Search, Customer Detail, and Logout. The Customer Detail window is active, showing the customer's name and SSN (OSOS ID: NY016822976). The Attachments tab is highlighted in the navigation bar, indicated by an orange arrow. Below the navigation bar, the Attachment Detail form is visible, containing fields for Source, Attachment Type, Notes, File Name, Staff, Office, and Last Modified. There is an Upload Attachment button. Below the form is a table with columns for Date Added, Attachment, Type, Source, and Staff. The table currently shows "No records found." At the bottom of the window, there are buttons for Add Attachment, Download Attachment, and Delete Attachment, along with a row of utility buttons including Save, Start Match, Activity, I.A. Referrals, Correspond, IVR, Links, Get To Srch, Comments, Tag, and Schedule.

After selecting the Attachments tab, click the **Add Attachment** button.

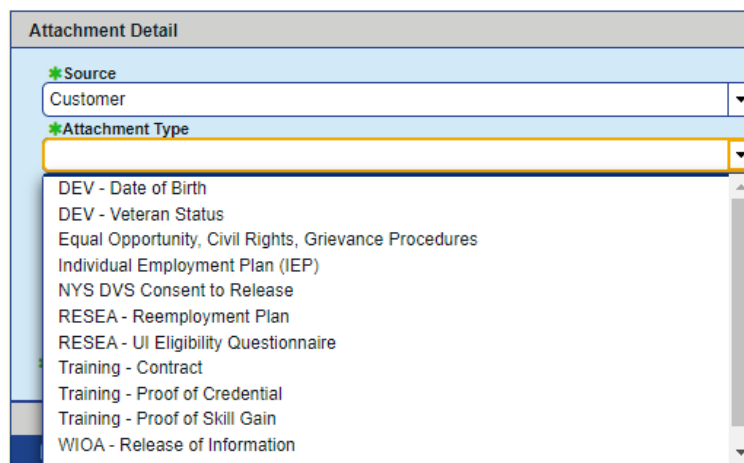
Select the source of the document you are uploading from the **Source** dropdown menu.



The screenshot shows the OSOS interface with the Attachments tab selected. The Attachment Detail form is visible, with an orange arrow pointing to the Source dropdown menu. The form includes fields for Source, Attachment Type, Notes, File Name, and Staff. Below the form is a table of attachments.

Date Added	Attachment	Type	Source	Staff
05/23/2024	WS1 Unemployment Eligibility Questionnaire.pdf	RESEA - Eligibility Questionnaire	Customer	SERAFINI, STOYKA

Then select the type of document you are uploading from the **Attachment Type** dropdown menu.



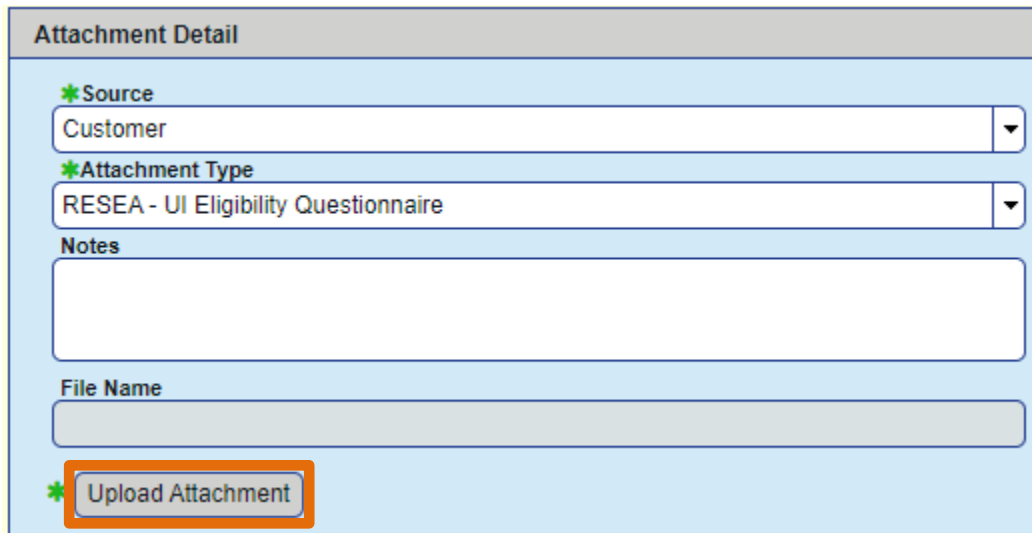
The screenshot shows the Attachment Type dropdown menu open, displaying a list of document types. The dropdown is highlighted with an orange border.

- DEV - Date of Birth
- DEV - Veteran Status
- Equal Opportunity, Civil Rights, Grievance Procedures
- Individual Employment Plan (IEP)
- NYS DVS Consent to Release
- RESEA - Reemployment Plan
- RESEA - UI Eligibility Questionnaire
- Training - Contract
- Training - Proof of Credential
- Training - Proof of Skill Gain
- WIOA - Release of Information



*Remember, you cannot upload any document that has not been listed in this guide. If you are trying to upload a document that is not listed in the dropdown menu, you should not upload it.*

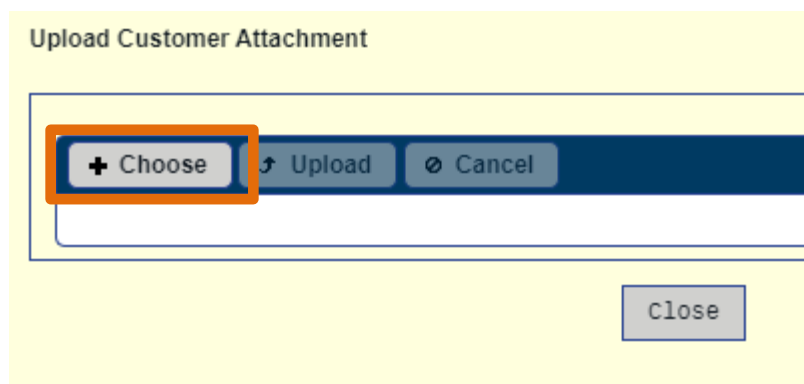
After selecting the Attachment Type, click the **Upload Attachment** button.



The screenshot shows a form titled "Attachment Detail" with a light blue background. It contains several fields: a dropdown menu for "Source" with "Customer" selected, a dropdown menu for "Attachment Type" with "RESEA - UI Eligibility Questionnaire" selected, a large empty text area for "Notes", and a greyed-out text field for "File Name". At the bottom left, there is a button labeled "Upload Attachment" with a green asterisk icon, which is highlighted with an orange border.

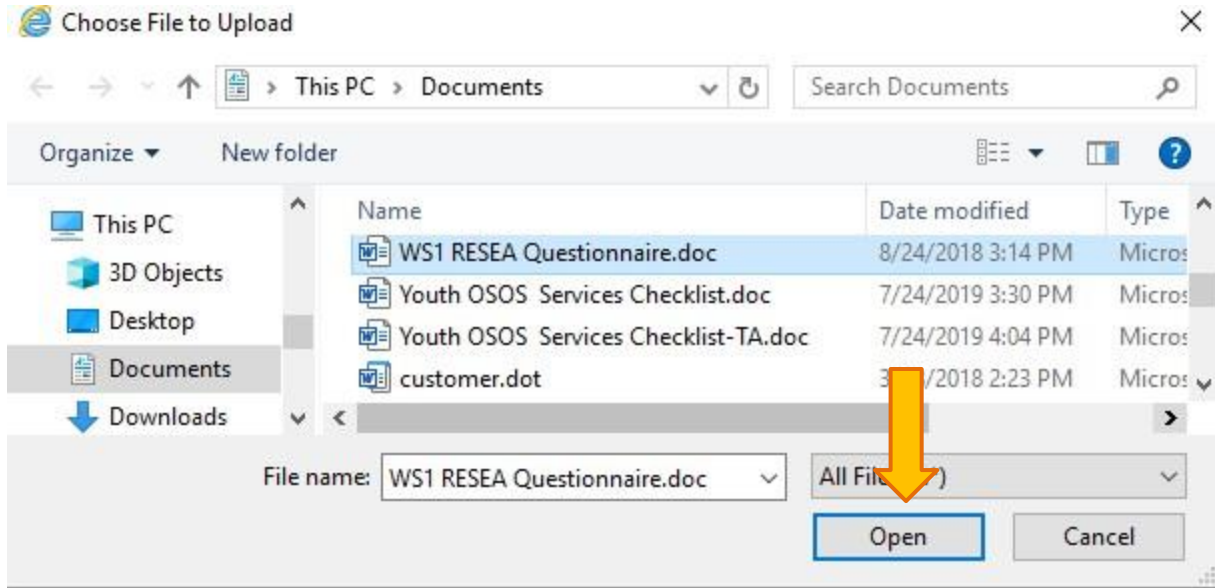
This will bring up the **Upload Customer Attachment** webpage dialog.

Click the **Choose** button.

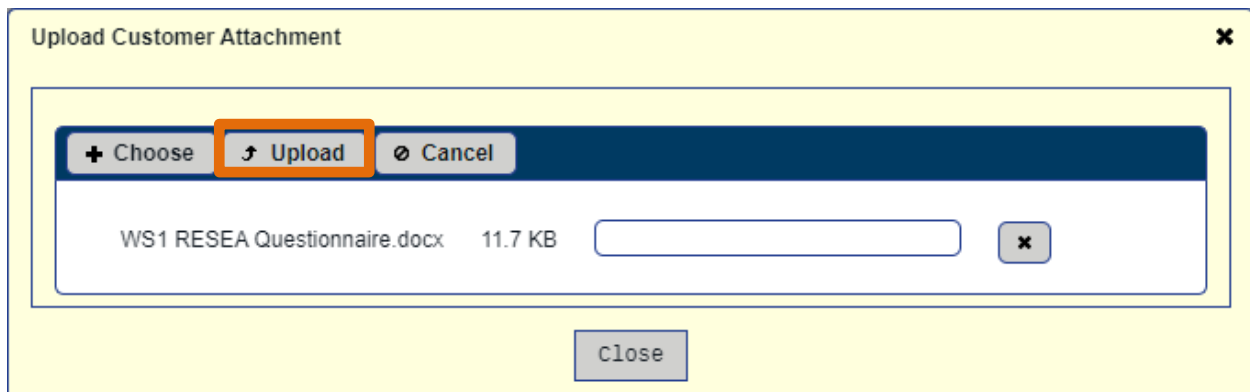


The screenshot shows a dialog box titled "Upload Customer Attachment" with a yellow background. It features a dark blue bar with three buttons: "+ Choose" (highlighted with an orange border), "Upload", and "Cancel". Below this bar is a large empty text area. At the bottom right of the dialog is a "Close" button.

Select the document to upload from your desktop. Click **Open**.

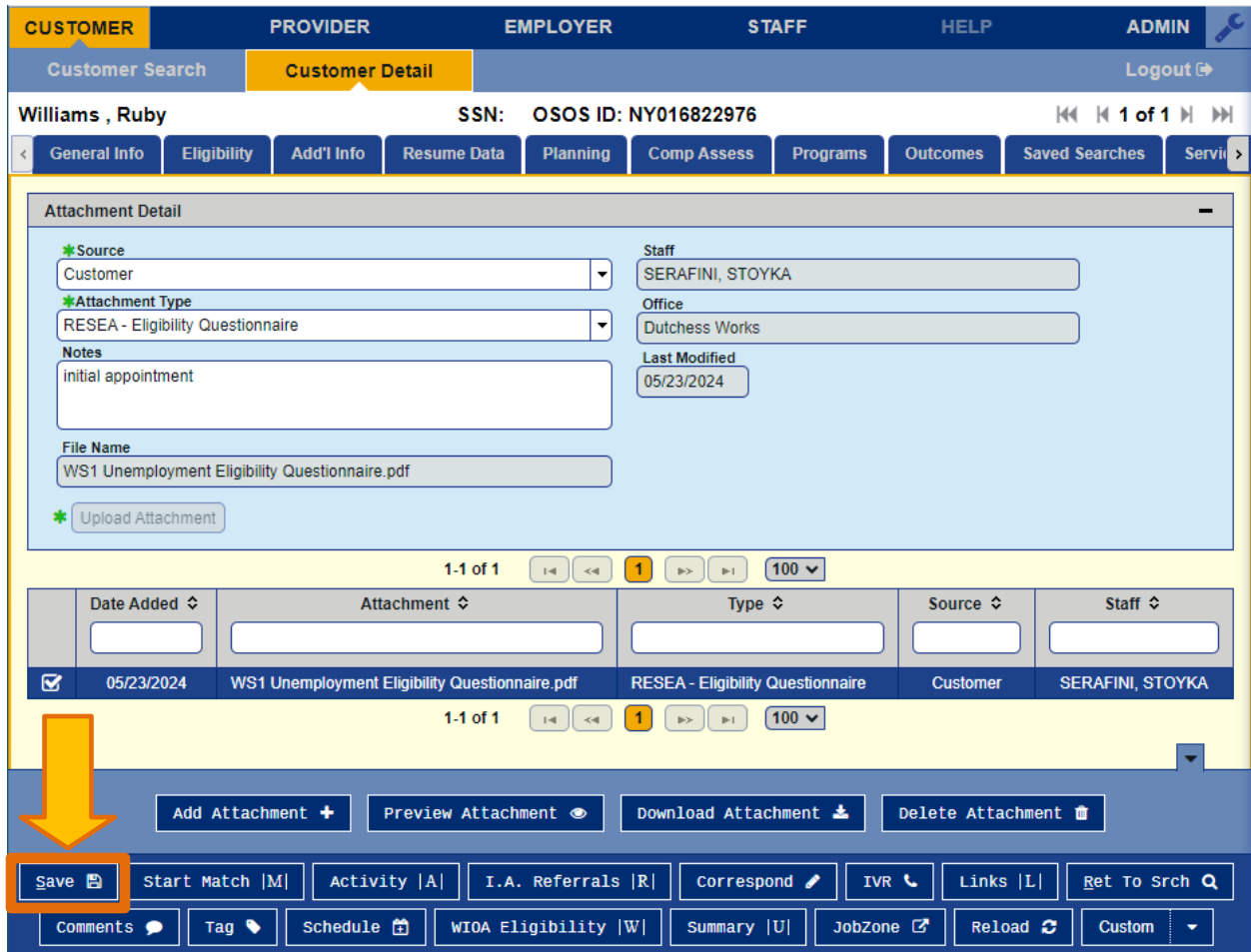


The file name is now displayed in the **Upload Customer Attachment** box. Click the **Upload** button.



Now the document is attached to the OSOS record.

Click the **Save** button at the bottom left of the screen immediately, before uploading another document.

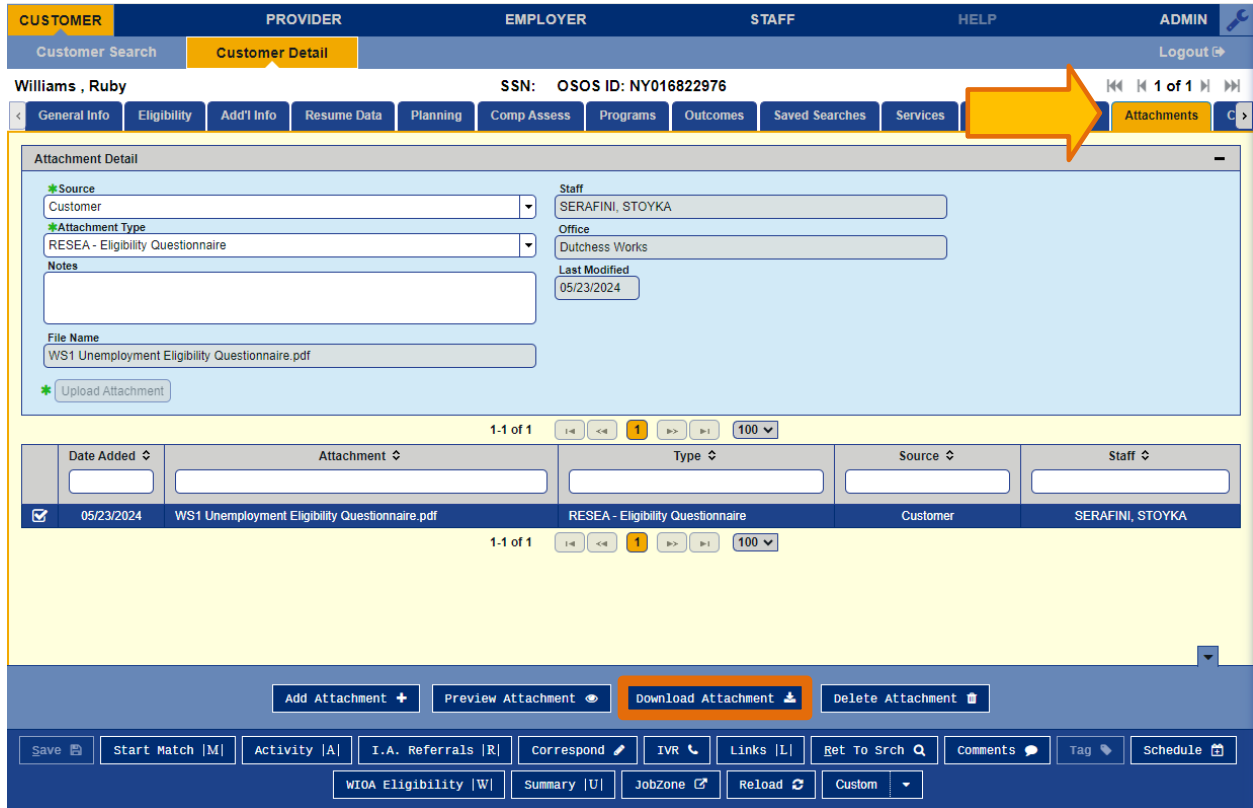


The screenshot displays the OSOS interface for a customer named Williams, Ruby. The page is titled "Attachment Detail" and shows a list of attachments. The first attachment is "WS1 Unemployment Eligibility Questionnaire.pdf" with a date of 05/23/2024. The attachment details include the source (Customer), attachment type (RESEA - Eligibility Questionnaire), notes (initial appointment), staff (SERAFINI, STOYKA), office (Dutchess Works), and last modified date (05/23/2024). A table below the details shows the attachment information. At the bottom of the page, a row of buttons is visible, with the "Save" button highlighted by an orange box and a large orange arrow pointing to it.

Date Added	Attachment	Type	Source	Staff
05/23/2024	WS1 Unemployment Eligibility Questionnaire.pdf	RESEA - Eligibility Questionnaire	Customer	SERAFINI, STOYKA



To download an attached document, select the document and click the **Download Attachment** button at the bottom of the screen.



Attachment Detail

Source: Customer  
Attachment Type: RESEA - Eligibility Questionnaire  
Notes:   
File Name: WS1 Unemployment Eligibility Questionnaire.pdf  
Upload Attachment

Staff: SERAFINI, STOYKA  
Office: Dutchess Works  
Last Modified: 05/23/2024

Date Added	Attachment	Type	Source	Staff
05/23/2024	WS1 Unemployment Eligibility Questionnaire.pdf	RESEA - Eligibility Questionnaire	Customer	SERAFINI, STOYKA

Buttons: Add Attachment, Preview Attachment, **Download Attachment**, Delete Attachment

Navigation: Save, Start Match |M|, Activity |A|, I.A. Referrals |R|, Correspond, IVR, Links |L|, Ret To Srch Q, Comments, Tag, Schedule

Footer: WIOA Eligibility |W|, Summary |U|, JobZone, Reload, Custom



*Requests to delete an uploaded document must be submitted to the OSOS Help Desk at [help.osos@labor.ny.gov](mailto:help.osos@labor.ny.gov) by a supervisor or manager.*



## RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found at:  
[Workforce Professionals Tools | Department of Labor \(ny.gov\)](#)

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: [help.osos@labor.ny.gov](mailto:help.osos@labor.ny.gov)