



# Creating a Basic Record OSOS 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 outlines the process to create a basic Customer Record in OSOS and highlights the required fields.

To better serve the customer, staff should always enter as much information as possible when creating the Customer Record. However, this guide details only the information required to create a basic OSOS Customer Record.

Please note, some customers may already have a Customer Record in OSOS. If the customer has received Unemployment Insurance, used Self Service tools such as JobZone, or registered at a local career center, an OSOS record will exist for that customer. If a customer record already exists, staff would not create a new Customer Record. Instead, they must review the existing customer information and update it as necessary.

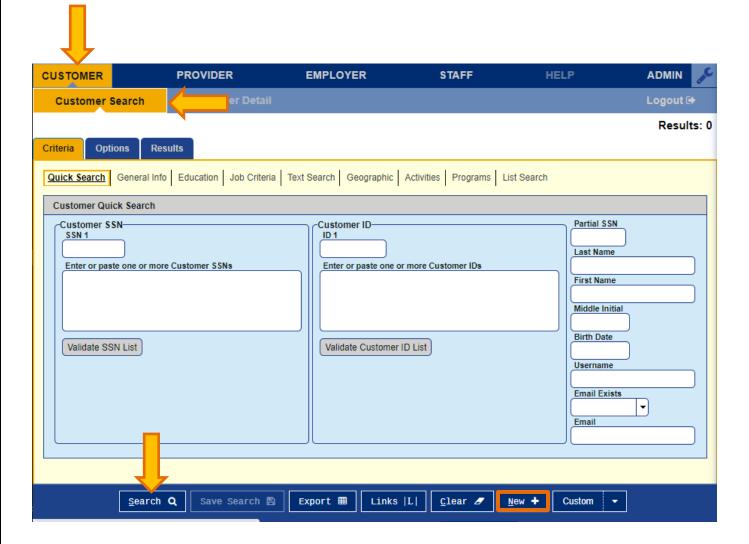


### OSOS DATA ENTRY

### **GETTING STARTED**

Upon logging into OSOS, it is a best practice to search for the customer by name prior to creating a new record. This will eliminate the risk of creating a duplicate record for a customer that may already exist in OSOS. To identify if a record already exists, enter the customers first and last name, or partial name and click search.

Once staff verify that the customer does not have an existing record in OSOS, click the **New** button to create the Customer Record.



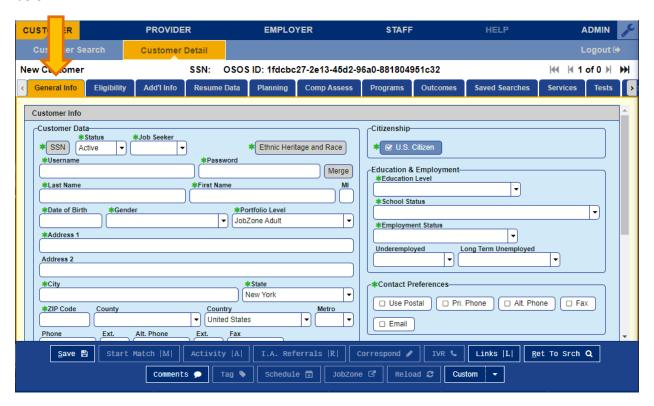


Creating a new OSOS customer record requires data entry in five tabs:

- General Info Tab
- Eligibility Tab
- Additional Info Tab
- Resume Data Tab
- Planning Tab

### **GENERAL INFORMATION TAB**

Upon clicking the **New** button, the **General Info** tab is displayed, as shown in the screenshot below.

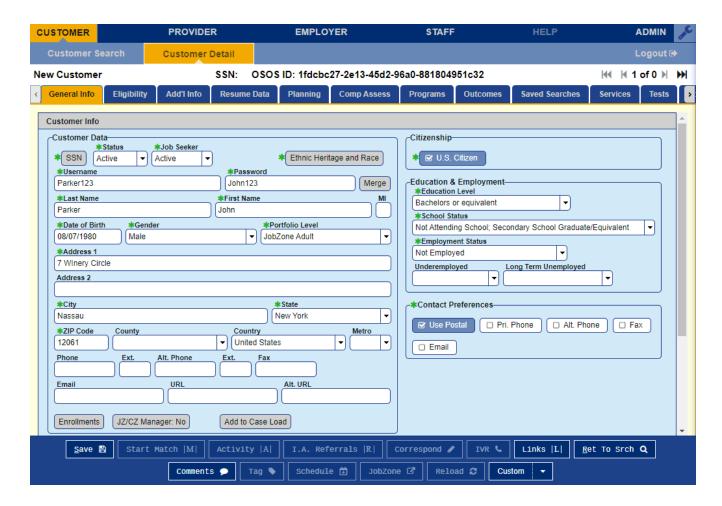




All required fields are indicated throughout OSOS by a green asterisk \* in front of the field name.



In the **General Info** tab, the required fields are: **SSN**, **Status** (system default), **Job Seeker**, **Username**, **Password**, **Last Name**, **First Name**, **Date of Birth**, **Gender**, **Portfolio Level** (system default), **Address**, **City**, **State** (system default), **Zip**, **U.S. Citizen** (system default), **Ethnic Heritage & Race**, **Education Level**, **School Status**, **Employment Status** and **Contact Preferences**. Record information into each of the required fields.

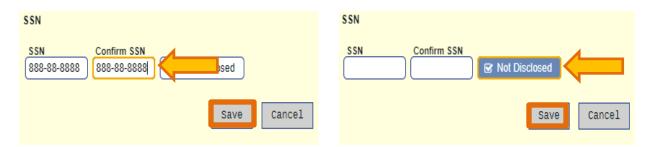




Do not click **Save** until all the required information, in all tabs, is recorded for the complete Basic Customer Record. If **Save** is selected before the data is completely entered, it will generate an error message. If this error message does appear, you will still be able to continue with the record 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.



**SSN:** The customer's Social Security Number is not required, but the field is required to be completed. If the customer provides their SSN, enter it in the **SSN** and **Confirm SSN** fields. Click **Save**. If the SSN is not available, check **Not Disclosed** and click **Save**.



**Job Seeker:** Select Active from the drop-down menu.

**Username and Password:** For all JobZone Adult customers, these fields are no longer functional for JobZone purposes, but data must be entered here to complete the customer record. For Career Zone youth customers, these fields are directly linked to the customer's Career Zone account.

Last Name, First Name, Date of Birth and Gender: Enter customer's information accordingly.

**Portfolio Level:** This field defaults to JobZone Adult. Do not change the default for a customer who is over the age of 18. If the customer is a high school student under 18 and will be utilizing Career Zone, this may be updated to Young Adult.

**Address, City, State, Zip:** Enter customer's information accordingly. Other data fields for **County, Country, Phone, Email** are not required to complete the customer record. However, if the information is available, enter the data into the appropriate fields.

**U.S. Citizen:** U.S. Citizen is automatically selected. If the customer is not a US Citizen, deselect U.S. Citizen and additional required fields will be displayed.

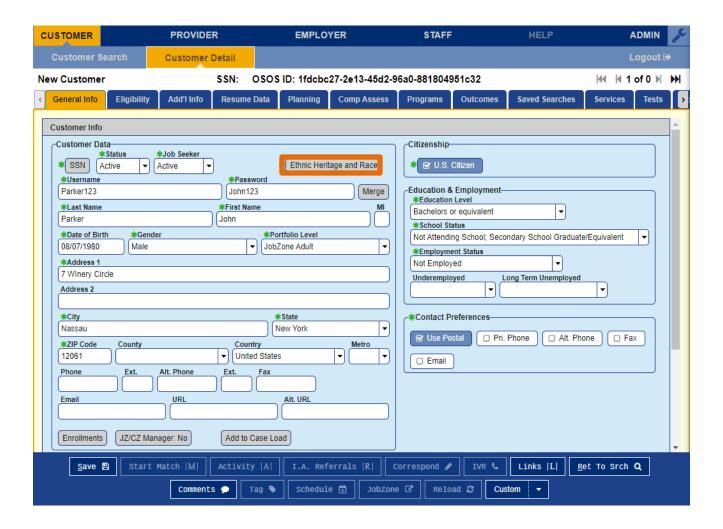
- Alien Reg # (Alien Registration Number) and Expires (Expiration Date), OR
- Alien Reg # and select Permanent

This information is not collected in OSOS. Enter "Z99999999" for the customer's Alien Registration Number. When entering the **Expiration Date**, enter a date in the very distant future, such as "12/31/2199."



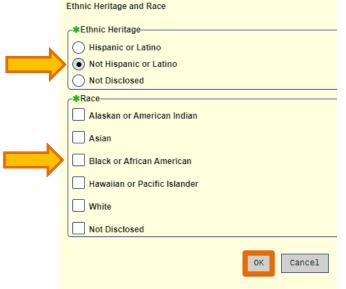


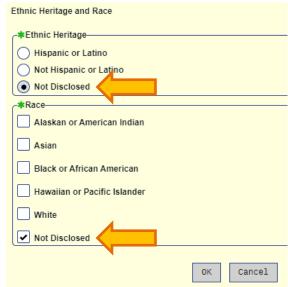
Ethnic Heritage & Race: Click the Ethnic Heritage & Race button.



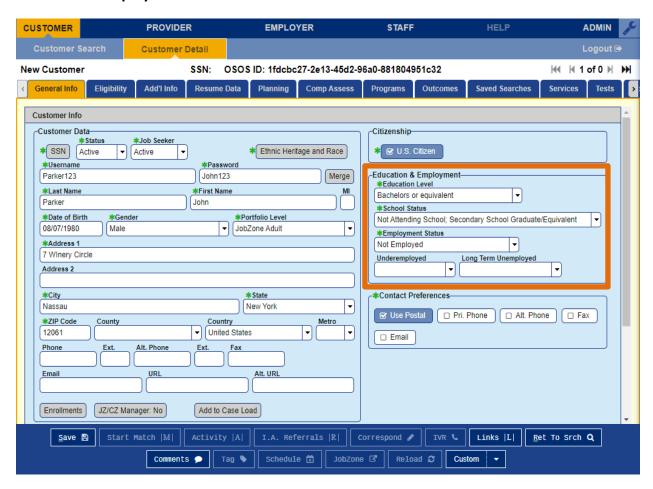
The customer is not required to disclose this information but entry in the data field is required to complete the customer record. If the customer discloses this information, select the appropriate choices, and then click **OK**. If the customer does not disclose Ethnic Heritage and/or Race, select **Not Disclosed** and then click **OK**.





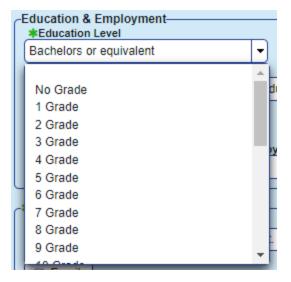


### **Education & Employment:**

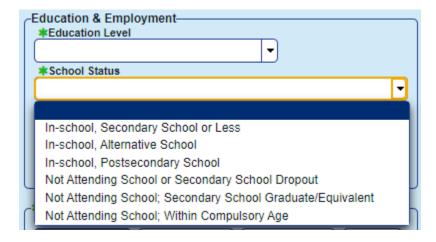




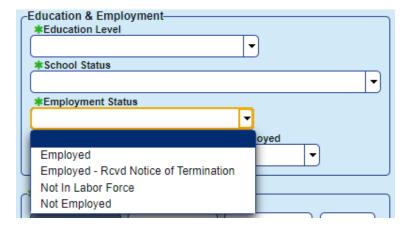
**Education Level:** Select appropriate option from the drop-down menu.



**School Status:** Select appropriate option from the drop-down menu.



**Employment Status:** Select appropriate option from the drop-down menu.



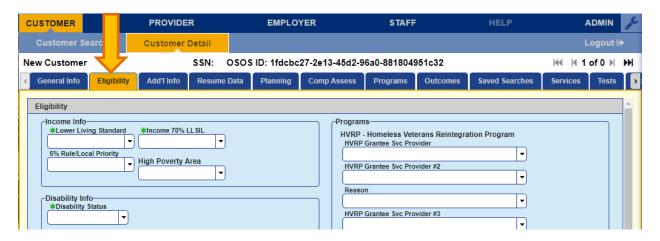


**Contact Preferences:** Select **Use Postal** as the Address is required to complete the customer record. Other preferences may additionally be selected if the information is provided in the corresponding data fields.



No further data is required on the **General Info** tab. The next set of data required to complete a customer record is located in the **Eligibility** tab.

### **ELIGIBILITY TAB**



Required Fields: Lower Living Standard, Income 70% LLSIL, Disability Status, and Migrant/Seasonal Worker.



### Income Info:

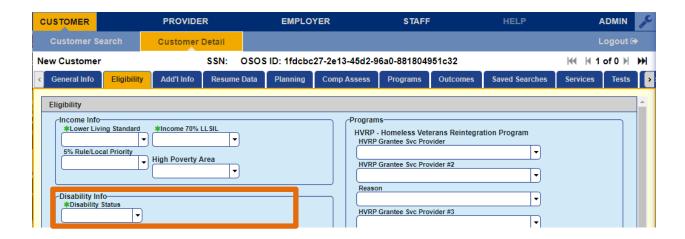


**Lower Living Standard / Income 70% LLSIL:** Select **Yes, No** or **Not Disclosed**. The Income Eligibility Guidelines can be found on the DOL Program & Tools webpage: https://dol.ny.gov/workforce-professionals-tools?f%5B0%5D=filter\_term%3A801



Where appropriate, select **Yes** only for Lower Living Standard **OR** Income 70% LLSIL. Do not select **Yes** for both.

### **Disability Info:**

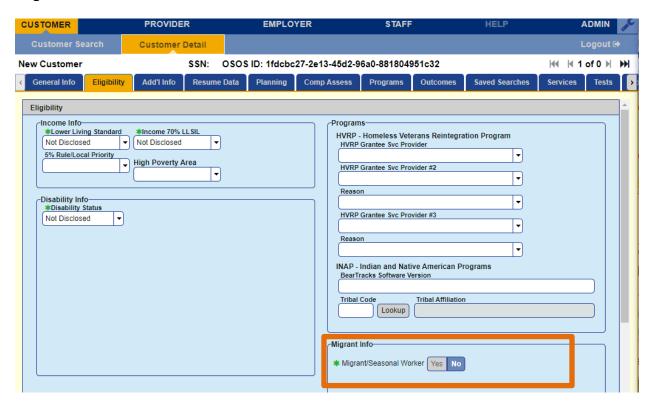




**Disability Status:** Select **Not Disabled, Not Disclosed**, or **Disabled**. Selecting Disabled will display additional required fields. If **Disabled** is selected, you must select at least one choice under Disability Category.

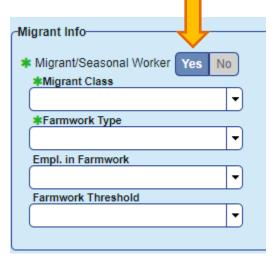


### Migrant Info:





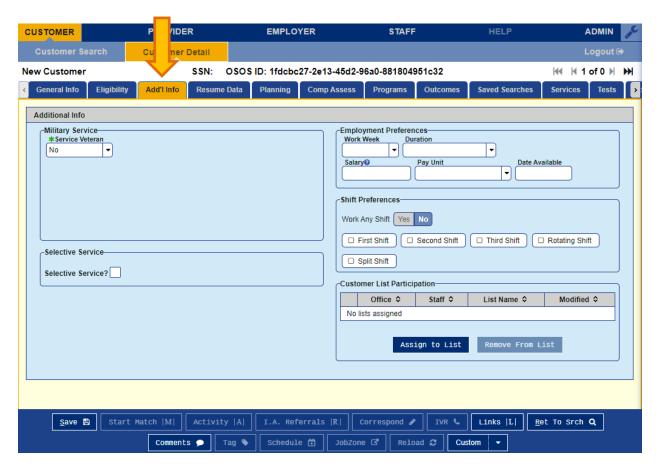
**Migrant/Seasonal Worker:** Select Yes or No. Selecting Yes for this field will display additional required fields. If you select Yes, you must select a **Clas** nd a **Farmwork Type**.



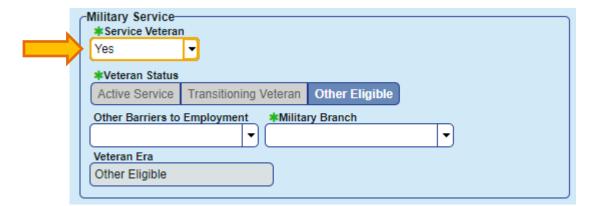
No further data is required in the **Eligibility** tab. The next set of data required to complete a customer record is located in the **Add'l Info** tab.



### ADDITIONAL INFORMATION TAB



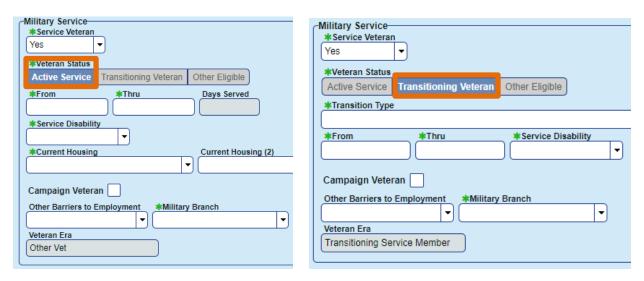
**Required Field: Service Veteran.** Select Yes, No, or Not Disclosed. If No or Not Disclosed is selected, no additional information is required. However, if Yes is selected, it will display additional required fields.





If the customer indicates Yes for **Service Veteran**, you must then select **Active Service**, **Transitioning Veteran**, or **Other Eligible**. Based on this selection, additional required fields may populate. Please reference the <u>Veterans' Program Terms and Definitions (ny.gov)</u> and the Military Service OSOS Guide <u>Workforce Professionals Tools | Department of Labor (ny.gov)</u> for more information on completing this section.





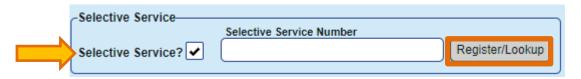
Please note: If **Other Eligible** is selected, you must record a comment in the **Comments tab**. For example, "Customer is an eligible spouse per VA letter."



If the customer is a **v**eteran, you will also need to administer the Military Service Questionnaire (MSQ).



**Required Field: Selective Service**. All males over the age of 18 must be registered with Selective Service and this information must be recorded. Select the check box and enter the customer's Selective Service number. If the customer does not know their Selective Service number, click on **Register/Lookup**. This opens the Selective Service System website in a new browser tab. Use this site to conduct an online verification of selective service registration using the customer's last name, SSN and date of birth. For more information on Selective Service registration requirements for the Workforce Innovation and Opportunity Act, please see <u>Technical Advisory 12-09.1</u>.

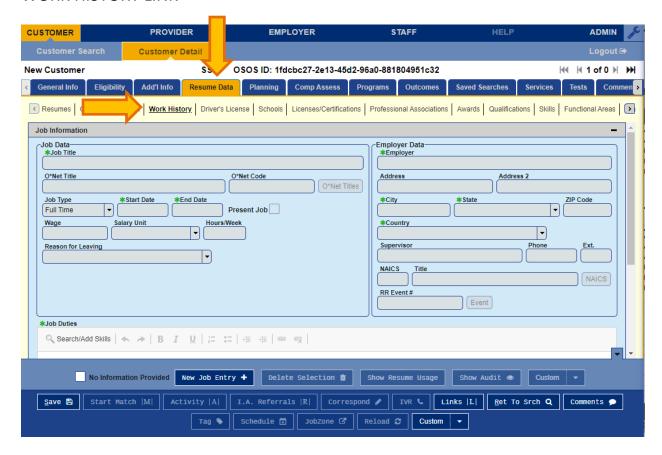


No further data is required on the **Additional Information** tab. The next set of data required to complete a customer record is located in the **Resume Data** tab.



### **RESUME DATA TAB**

### **WORK HISTORY LINK**



Required Fields: Job Title, Employer, Start Date, End Date, Address, City, State, Zip, Country, and Job Duties.

If a customer has no Work History or did not provide information, select **No Information Provided**.

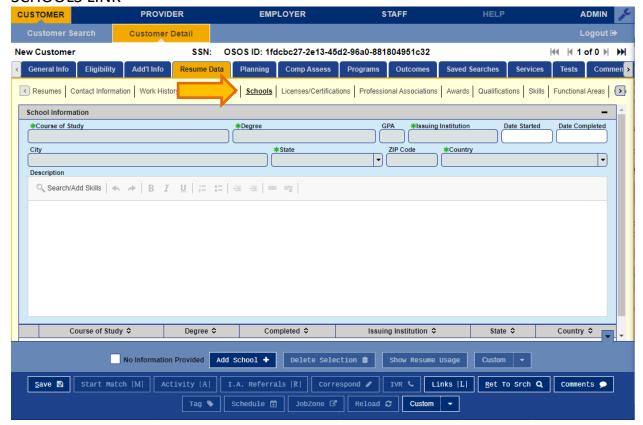




If the customer has a Work History, enter each position separately. Click the **New Job Entry** button and enter the required fields.



### **SCHOOLS LINK**



Required Fields: Course of Study, Degree, Issuing Institution, State, and Country.

Click the **Add School** button and enter the required fields.

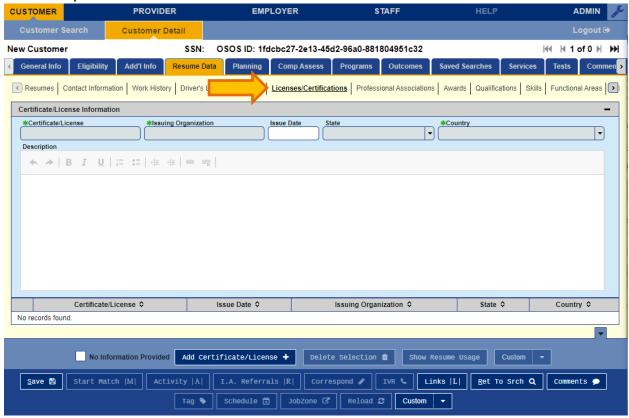




If a customer has no schooling or did not provide information, select **No Information Provided**.



LICENSES/CERTIFICATIONS LINK



Required Fields: Certificates/Licenses, Issuing Organization, and Country.

Click the Add Certificate/License button then enter the required fields.

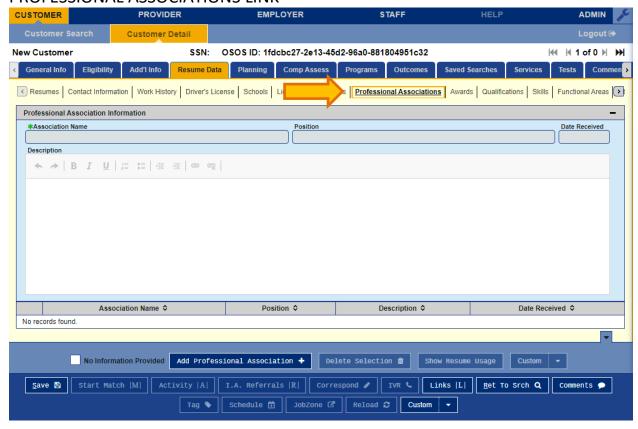




If there is no data to enter, check the box for **No Information Provided.** 



### PROFESSIONAL ASSOCIATIONS LINK



Required Fields: Association Name.

Click the **Add Professional Association** button then enter the required fields.

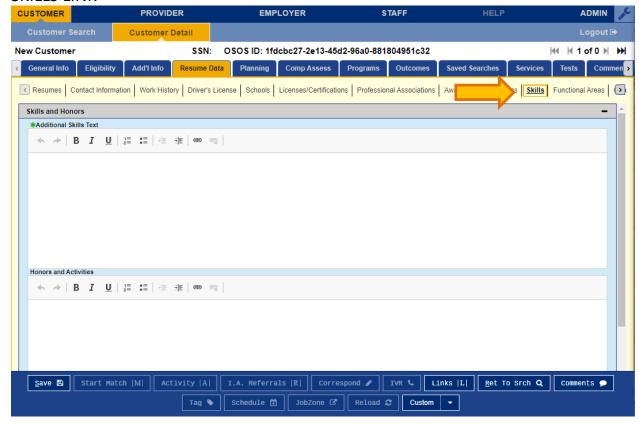




If there is no data to enter, check the box for **No Information Provided.** 



### SKILLS LINK



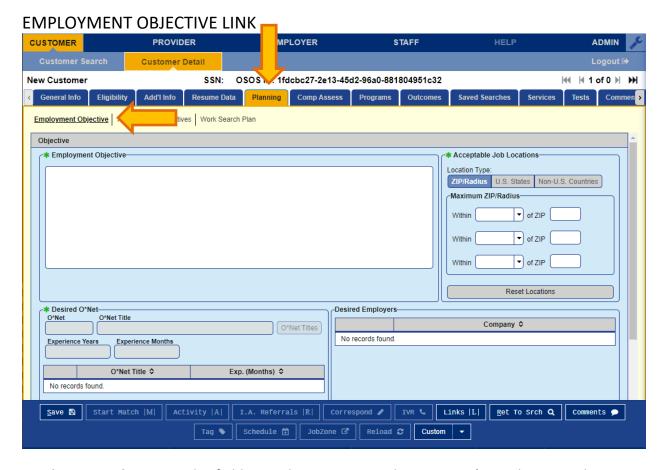
### Required Field: Additional Skills Text.

**Additional Skills:** This field is used to enter any additional skills and abilities that are important in the customer's job performance. Information entered should succinctly and strongly emphasize the customer's skills. This field is a maximum of 4000 characters.

No further data is required in the **Resume Data** tab. The next set of required data is in the **Planning** tab under the **Employment Objective** link.



### **PLANNING TAB**



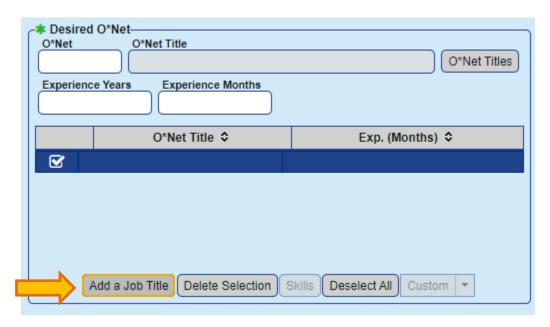
**Employment Objective:** This field is used to summarize the customer's employment objectives. It should succinctly and strongly emphasize the customer's qualifications and desired position. This field is a maximum of 4000 characters.



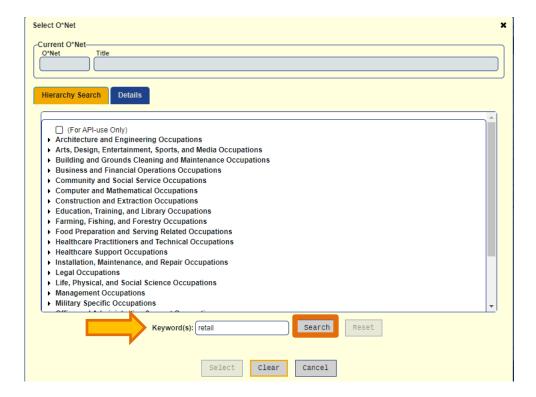


**Desired O\*Net:** At least one Desired O\*Net job title is required. First, click **Add a Job Title**. This allows you to either free type an O\*Net Title Number in the **O\*Net Title** free text box or click the **O\*Net Titles** button to search for the appropriate job title.

Click the **O\*Net Titles** button to display the Select O\*Net webpage dialog box.

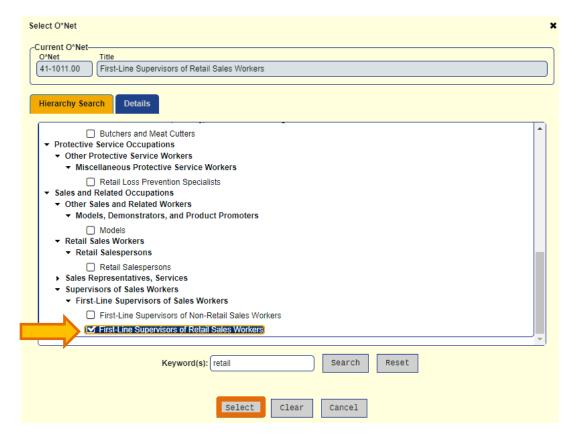


Enter a keyword into the Keyword(s) text box and click **Search**.

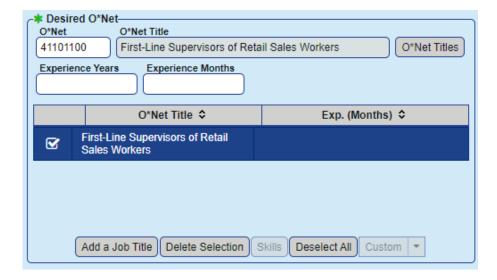




When the correct O\*Net job title is found using the folders, check the box next to the appropriate job title, and click **Select**.



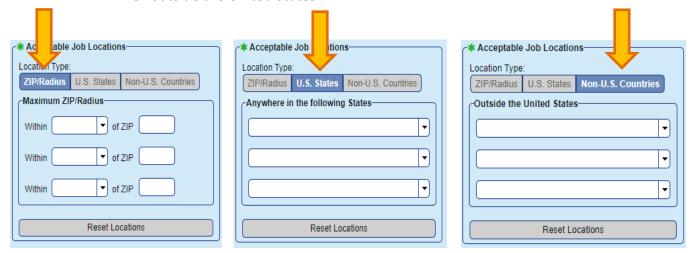
Once selected, the O\*Net code and title then populate in the **Desired O\*Net** fields of the **Objective** tab.





**Acceptable Job Locations:** Indicate at least one choice from the following categories:

- Maximum Zip/Radius
- Or anywhere in the following States
- Or outside the United States





The remaining tabs are not required to create a Basic OSOS Customer Record.

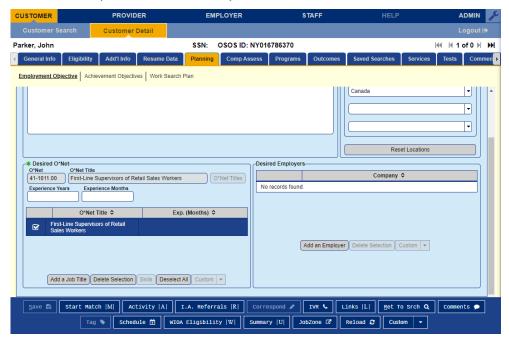


### SAVING THE RECORD

When data entry is complete, click **Save** at the bottom left corner of any tab. A unique ID number is now assigned to the customer.



If any required data is missing, a **Customer Detail Error** message appears indicating what information is required to successfully save the Customer Record. Click **OK**.



Navigate to the appropriate tab and complete the required data field(s). Click **Save.** The Customer Record will display the new ID Number when the Customer Record is successfully created.



## **RESOURCES AND ASSISTANCE**

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: <a href="mailto:help.osos@labor.ny.gov">help.osos@labor.ny.gov</a>