

Documenting Services to Youth Program Customers 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 will provide a comprehensive overview of searching for WIOA Youth Program offerings and attaching services to youth records in OSOS.

Important Definitions

Providers – Providers are approved organizations in a local area that offer services to youth participants. Providers can offer services in multiple locations within a Local Workforce Development Board (LWDB).

Services – Under the Workforce Innovation and Opportunity Act (WIOA), the LWDB is tasked with ensuring that all 14 WIOA Youth elements are available in its area. This is achieved by local providers, who may offer one or more program elements. They are recorded as services in OSOS.

Offerings – Offerings are entered in OSOS by designated local area staff. They are used to designate where and when the service will take place. Offerings also provide information regarding language, number of available seats, and other pertinent service information. Local areas can provide multiple offerings for the same service element.



OSOS TERMS

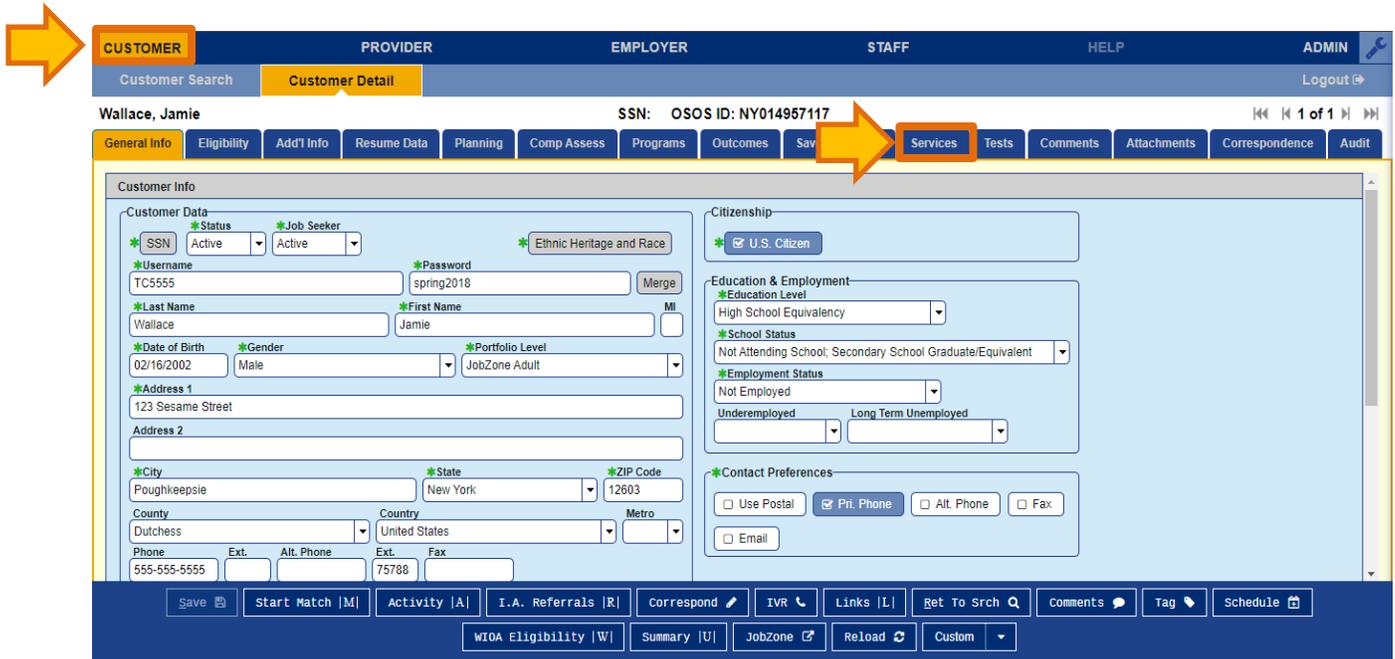
OSOS is comprised of Modules, Windows, Tabs, Links, and functional Buttons as illustrated in the screenshot below. These terms will be referenced throughout this guide.

The screenshot displays the OSOS interface for a customer named Ethan. The interface is organized into several key components:

- Windows:** The main content area is a large window containing job information and employer data.
- Modules:** The top navigation bar includes modules such as CUSTOMER, PROVIDER, OVER, STAFF, HELP, and ADMIN.
- Tabs:** A secondary navigation bar below the modules contains tabs for Customer Search, Customer Detail, and other functions.
- Links:** A horizontal menu below the tabs provides links to various sections like General Info, Eligibility, Add'l Info, Resume History, etc.
- Buttons:** A bottom toolbar contains functional buttons such as Save, Start Match, Activity, I.A. Referrals, Correspond, IVR, Links, Get To Srch, Comments, Tag, Schedule, WIOA Eligibility, JobZone, and Reload.

PROVIDER SEARCH

To begin, locate the correct customer record. Then, from the **Customer** module, navigate to the **Services** tab.



The screenshot shows the OSOS Customer Detail page for a customer named Wallace, Jamie. The page is divided into several sections:

- Customer Data:** Includes fields for SSN (TC5555), Status (Active), Job Seeker (Active), Username (TC5555), Password (spring2018), Last Name (Wallace), First Name (Jamie), Date of Birth (02/16/2002), Gender (Male), Portfolio Level (JobZone Adult), Address 1 (123 Sesame Street), City (Poughkeepsie), State (New York), ZIP Code (12603), County (Dutchess), and Country (United States).
- Citizenship:** Includes a checkbox for U.S. Citizen.
- Education & Employment:** Includes fields for Education Level (High School Equivalency), School Status (Not Attending School; Secondary School Graduate/Equivalent), and Employment Status (Not Employed).
- Contact Preferences:** Includes checkboxes for Use Postal, Pri. Phone, Alt. Phone, Fax, and Email.

The 'Services' tab is highlighted with a yellow arrow, and the 'Customer' module is also highlighted with a yellow arrow.



If a customer has an existing OSOS record, it is important to ensure all information is verified and updated each time you work with the customer.



From the **Customer Detail** window, select the **Services** tab, **Services** link and click the **New Service** button at the bottom of the screen.

The screenshot shows the OSOS Customer Detail window for Customer, Ethan (SSN: OSOS ID: NY014950531). The Services tab is selected, and the 'New Service' button is highlighted in orange. The window displays various fields for service details, including Service ID (103006), Service Name (OJT), Service Type (On-the-Job Training), Provider ID (75438), Provider Name (Bronstein Container), Location Name (CNY Works), and Offering ID (110612). A Funding table is also visible, showing a total funding of \$1.00 and an obligated amount of 1.00.

Level	Source	Obligated	Actual	Oblig #	
<input type="checkbox"/>	WIB	Adult Statewide 15%	1.00	0.00	107400

OSOS will navigate to the **Provider** module.

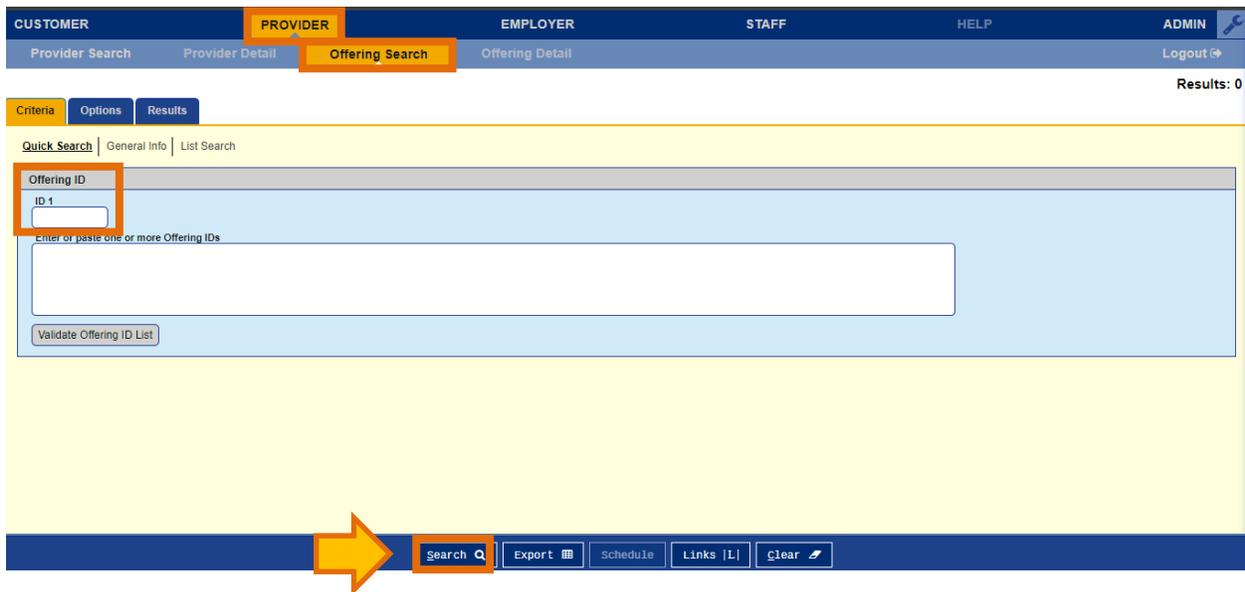
OFFERING SEARCH

All Level 2 (L2) Youth Services are created and stored in the **Provider** module.



There is designated staff in each of the Local Workforce Development Areas (LWDAs) that have permissions to create and modify provider offerings. It is important that you work with your partner who can add new offerings to ensure that there is an offering available for each of the service elements.

From the **Provider** module, navigate to the **Offering Search** window. If the Offering ID is known, enter it in the **Offering ID** field and click **Search**.



The screenshot shows the OSOS web application interface. At the top, there is a navigation bar with tabs for CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, HELP, and ADMIN. Below this, there are sub-tabs for Provider Search, Provider Detail, Offering Search (selected), and Offering Detail. A 'Logout' button is visible on the right. The main content area has tabs for Criteria, Options, and Results. Under 'Criteria', there are sub-tabs for Quick Search (selected), General Info, and List Search. The 'Quick Search' section contains an 'Offering ID' field with a sub-field 'ID 1' highlighted by an orange box. Below this is a large text input area with the placeholder text 'Enter or paste one or more Offering IDs' and a 'Validate Offering ID List' button. At the bottom of the interface, there is a blue bar with a yellow arrow pointing to the right, and a 'Search' button (highlighted with an orange box) along with 'Export', 'Schedule', 'Links | L', and 'Clear' buttons.



As a best practice, staff working with youth customers should create a list of commonly used Offering IDs used by a given provider. This will make it easier to select the appropriate service when entering data.



If the Offering or Provider ID is unknown, the offering must be identified by searching in the **Offering Search** window.

Customizing search results will help ensure the appropriate service type, offering and location is associated with the service being provided. Before searching for the service, click the **Options** tab to customize your search results.

The screenshot displays the OSOS web application interface. At the top, there is a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP, and ADMIN. Below this, a secondary navigation bar shows 'Provider Search', 'Provider Detail', 'Offering Search' (which is highlighted), and 'Offering Detail'. On the right side of this bar, there is a 'Logout' link and a 'Results: 0' indicator. Below the navigation, there are two tabs: 'Options' (which is selected and highlighted with a yellow arrow) and 'Results'. The main content area is titled 'General Info' and contains several form fields and checkboxes. The 'Location' section includes a dropdown for 'WIB' and a text field for 'City'. The 'Start Date Range' section has 'From' and 'To' text boxes. The 'Provider Information' section includes fields for 'Provider Name', 'Service Name', and 'Service Program'. Below these are dropdowns for 'Provider Status' (set to 'Active') and 'Service Type'. The 'Pay for Performance', 'ETP Status', and 'Training Prerequisite' sections each have a dropdown menu. The 'Credential Name' section has a text input field. The 'ETP Program of Study Leading to' section contains several checkboxes: 'Industry Recognized Certification', 'Registered Apprenticeship', 'State or National License', 'Associate Degree', 'Bachelor's Degree', 'Community College Certificate', 'Secondary School Diploma or Equivalent', 'Employment', 'MSG Leading to Credential', and 'MSG Leading to Employment'. At the bottom of the form, there is a 'Program Format' section. The footer of the interface includes a 'Search' button with a magnifying glass icon, an 'Export' button with a grid icon, a 'Schedule' button, a 'Links |L|' button, and a 'Clear' button with a trash can icon.



Select the options to display in your offering search results. Here is a suggested sequence of display options: (1) **Provider Name**, (2) **Service Name**, (3) **Service Description**, (4) **Service Type**, and (5) **Location Name**. Additional options may be selected as needed. Once you have identified and ordered the fields that you wish to display in your search results, select the **Set as My Defaults** check box.

The screenshot shows the 'Options' tab for the 'Offering Search' section. The interface is organized into three main categories: Provider, Provider Location, and Provider Service. Each category contains a list of fields with checkboxes and a ranking dropdown menu. The following table summarizes the checked options and their rankings:

Category	Field	Checked	Rank
Provider	Provider ID	<input type="checkbox"/>	
	Provider Name	<input checked="" type="checkbox"/>	2
	Federal ID (FEIN)	<input type="checkbox"/>	
	State ID (SEIN)	<input type="checkbox"/>	
	Address 1	<input type="checkbox"/>	
	Address 2	<input type="checkbox"/>	
	City	<input type="checkbox"/>	
	State	<input type="checkbox"/>	
	ZIP Code	<input type="checkbox"/>	
	Provider Phone	<input type="checkbox"/>	
Provider Location	Location Suffix	<input type="checkbox"/>	
	Location Name	<input checked="" type="checkbox"/>	3
	Location Addr. 1	<input type="checkbox"/>	
	Location Addr. 2	<input type="checkbox"/>	
	Location City	<input type="checkbox"/>	
Provider Service	Training Prerequisite	<input type="checkbox"/>	
	Credential Name	<input type="checkbox"/>	
	Part Time Learning	<input type="checkbox"/>	
	Distance Learning	<input type="checkbox"/>	
	Online Learning	<input type="checkbox"/>	
	E-Learning	<input type="checkbox"/>	
	In Person	<input type="checkbox"/>	
	Service Type	<input type="checkbox"/>	
	Service Category	<input type="checkbox"/>	
	Service Name	<input checked="" type="checkbox"/>	1
Service Description	<input checked="" type="checkbox"/>	4	
Training Credit Hrs.	<input type="checkbox"/>		
Hours	<input type="checkbox"/>		
Days	<input type="checkbox"/>		
Weeks	<input type="checkbox"/>		
WIOA Eligible Status	<input type="checkbox"/>		
CIP Code	<input type="checkbox"/>		
O'Net Title	<input type="checkbox"/>		
Delete?	<input type="checkbox"/>		
Service Modify Time	<input type="checkbox"/>		

At the bottom of the form, there are three buttons: 'Show My Defaults' (with a dropdown arrow), 'Show System Defaults', and 'Save As My Defaults' (with a checkmark icon). A yellow arrow points to the 'Save As My Defaults' button. To the right of these buttons is an 'Apply' button with a refresh icon. Below the buttons are several utility buttons: 'Search', 'Export', 'Schedule', 'Links', and 'Clear'.



Click on the **General Info** link to begin the provider search. In the **Location** section, select the appropriate LWDB (which is referenced in OSOS as WIB) from the dropdown.

Then click the **Service Type** button.

The screenshot displays the OSOS web application interface for provider search. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP, and ADMIN. The PROVIDER tab is active, and the 'Offering Search' sub-tab is selected. The 'General Info' link is highlighted with a red box. The search criteria section is visible, with the 'Location' dropdown menu open, showing a list of LWDBs. The 'Service Type' button is highlighted with a red box and an arrow. The 'General Info' link is also highlighted with a red box. The search criteria section includes fields for Location, City, Start Date Range, Service Program, and ETP Program of Study Leading to. The ETP Program of Study Leading to section includes checkboxes for Industry Recognized Certification, Registered Apprenticeship, State or National License, Associate Degree, Bachelor's Degree, Community College Certificate, Secondary School Diploma or Equivalent, Employment, MSG Leading to Credential, and MSG Leading to Employment. The search criteria section also includes a 'Program Format' section. The search criteria section is highlighted with a red box. The search criteria section includes a 'Quick Search' field, a 'List Search' button, and a 'Results: 0' indicator. The search criteria section also includes a 'Criteria' tab, an 'Options' tab, and a 'Results' tab. The search criteria section also includes a 'Search' button, an 'Export' button, a 'Schedule' button, a 'Links | L' button, and a 'Clear' button.

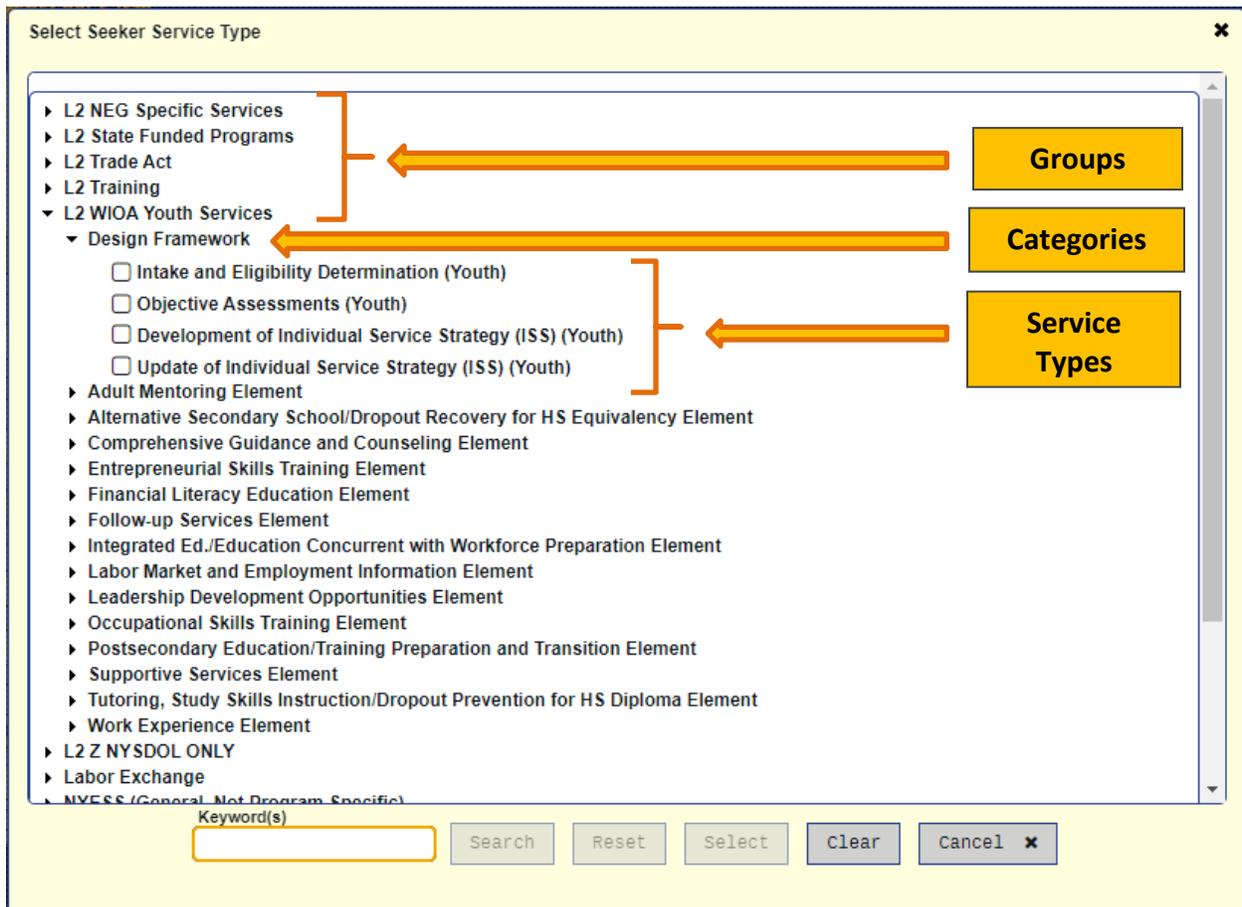
SERVICE TYPE SELECTION

Once the **Service Type** button has been selected, the **Service Type** box will appear. OSOS Service Types are organized into three hierarchies: Groups, Categories, and Service Types. The first set of folders are Groups. For youth data entry, staff will select the **L2 WIOA Youth Services** group.

The second set of folders are the Categories. These Categories mirror the 14 WIOA Youth Elements with one additional Category that encompasses the Design Framework Services. Within each of the Categories are the Service Types that are selected when data entering the Program Service Type for the customer. These terms will be used throughout this guide.



Prior to attaching a Youth Element to a participant record, all youth eligibility data must be documented in OSOS. In addition, an Intake and Eligibility Determination, Objective Assessment and the Development of Individual Service Strategy must be completed with the customer and the respective Service Types entered in OSOS under the Design Framework Category.



Select Seeker Service Type

- ▶ L2 NEG Specific Services
- ▶ L2 State Funded Programs
- ▶ L2 Trade Act
- ▶ L2 Training
- ▼ L2 WIOA Youth Services
 - ▼ Design Framework
 - Intake and Eligibility Determination (Youth)
 - Objective Assessments (Youth)
 - Development of Individual Service Strategy (ISS) (Youth)
 - Update of Individual Service Strategy (ISS) (Youth)
 - ▶ Adult Mentoring Element
 - ▶ Alternative Secondary School/Dropout Recovery for HS Equivalency Element
 - ▶ Comprehensive Guidance and Counseling Element
 - ▶ Entrepreneurial Skills Training Element
 - ▶ Financial Literacy Education Element
 - ▶ Follow-up Services Element
 - ▶ Integrated Ed./Education Concurrent with Workforce Preparation Element
 - ▶ Labor Market and Employment Information Element
 - ▶ Leadership Development Opportunities Element
 - ▶ Occupational Skills Training Element
 - ▶ Postsecondary Education/Training Preparation and Transition Element
 - ▶ Supportive Services Element
 - ▶ Tutoring, Study Skills Instruction/Dropout Prevention for HS Diploma Element
 - ▶ Work Experience Element
- ▶ L2 Z NYSDOL ONLY
- ▶ Labor Exchange
- ▶ NYESS (General, Not Program Specific)

Groups

Categories

Service Types

Keyword(s)

Search Reset Select Clear Cancel x



L2 WIOA YOUTH SERVICE CATEGORIES AND SERVICE TYPES

- 📁 Design Framework
 - Intake and Eligibility Determination (Youth)
 - Objective Assessments (Youth)
 - Development of Individual Service Strategy (ISS) (Youth)
 - Update of Individual Service Strategy (ISS) (Youth)
- 📁 Adult Mentoring Element
 - Adult Mentoring (Youth)
- 📁 Alternative Secondary School/Dropout Recovery for HS Equivalency Element
 - Alternative Secondary School/Dropout Recovery for HS Equivalency (Youth)
- 📁 Comprehensive Guidance and Counseling Element
 - Comprehensive Guidance and Counseling (Youth)
- 📁 Entrepreneurial Skills Training Element
 - Entrepreneurial Skills Training (Youth)
- 📁 Financial Literacy Education Element
 - Financial Literacy Education (Youth)
- 📁 Follow-up Services Element
 - Follow-up Adult Mentoring (Youth)
 - Follow-up Financial Literacy (Youth)
 - Follow-up Labor Market and Employment Information (Youth)
 - Follow-up Postsecondary Transition (Youth)
 - Follow-up Supportive Services (Youth)
 - Follow-up Non-Element (Youth)
- 📁 Integrated Ed./Education Concurrent with Workforce Preparation Element
 - Integrated Ed./Education Concurrent with Workforce Preparation (Youth)
- 📁 Labor Market and Employment Information Element
 - Labor Market and Employment Information (Youth)
- 📁 Leadership Development Opportunities Element
 - Leadership Development Opportunities (Youth)
- 📁 Occupational Skills Training Element
 - Occupational Skills Training
- 📁 Postsecondary Education/Training Preparation and Transition Element
 - Postsecondary Education/Training Preparation and Transition (Youth)
- 📁 Supportive Services Element
 - Supportive Services – Child Care (Youth)
 - Supportive Services – Dependent Care (Youth)
 - Supportive Services – Housing (Youth)
 - Supportive Services – Needs-Related Payments (Youth)
 - Supportive Services – Transportation (Youth)
 - Supportive Services – Other (Youth)
- 📁 Tutoring, Study Skills Instruction/Dropout Prevention for HS Diploma Element
 - Tutoring, Study Skills Instruction/Dropout Prevention for HS Diploma (Youth)
- 📁 Work Experience Element
 - Employment/Internships, Not Limited to Summer (Youth)
 - Job Shadowing (Youth)
 - On-the-Job Training (Youth)
 - Pre-Apprenticeship Programs (Youth)
 - Summer Employment/Internships, Summer Only (Youth)
 - Other Work Experience Type (Youth)



All WIOA Youth Program Services Types can be found by selecting the **L2 WIOA Youth Services** group, and expanding the appropriate folder.



All WIOA Youth Service Types are identified by the word “Youth” in parenthesis, except Occupational Skills Training. With this one exception, if the word Youth is not in parenthesis, then it is not a Youth Service. This is especially important if you are searching for an applicable Service Type using the Keyword(s) search field at the bottom of the dialog box. For instance, if staff do a keyword search for Follow-up, there may be several search results. Youth providers must only select the service types that are designated with the word “Youth” at the end.

NOTE: Occupational Skills Training will not display the word Youth in the Service Type because of the requirement that all ITA trainings must be listed on the Eligible Training Provider List (ETPL). Since the ETPL does not differentiate trainings available to youth and adults, the same service type must be used for all ETPL approved trainings.

Select Seeker Service Type

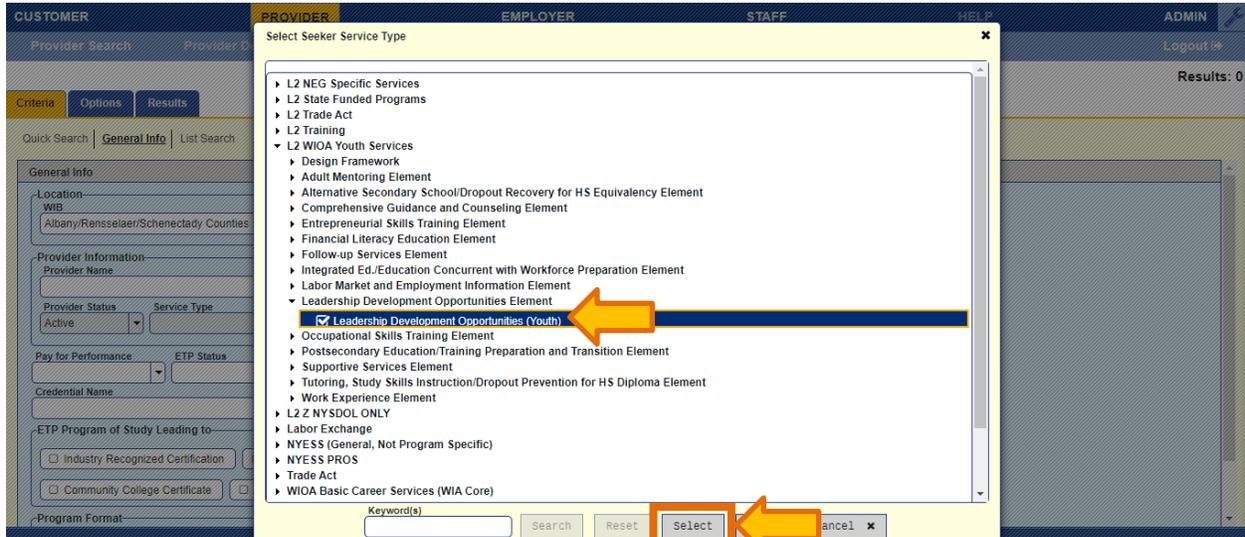
- ▼ L2 WIOA Youth Services
 - ▶ Design Framework
 - ▶ Adult Mentoring Element
 - ▶ Alternative Secondary School/Dropout Recovery for HS Equivalency Element
 - ▶ Comprehensive Guidance and Counseling Element
 - ▶ Entrepreneurial Skills Training Element
 - ▶ Financial Literacy Education Element
 - ▶ Follow-up Services Element
 - ▶ Integrated Ed./Education Concurrent with Workforce Preparation Element
 - ▼ Labor Market and Employment Information Element
 - Labor Market and Employment Information (Youth)
 - ▼ Leadership Development Opportunities Element
 - Leadership Development Opportunities (Youth)
 - ▼ Occupational Skills Training Element
 - Occupational Skills Training
 - ▼ Postsecondary Education/Training Preparation and Transition Element
 - Postsecondary Education/Training Preparation and Transition (Youth)
 - ▼ Supportive Services Element
 - Supportive Services - Child Care (Youth)
 - Supportive Services - Dependent Care (Youth)

Keyword(s)

Search Reset Select

Clear Cancel

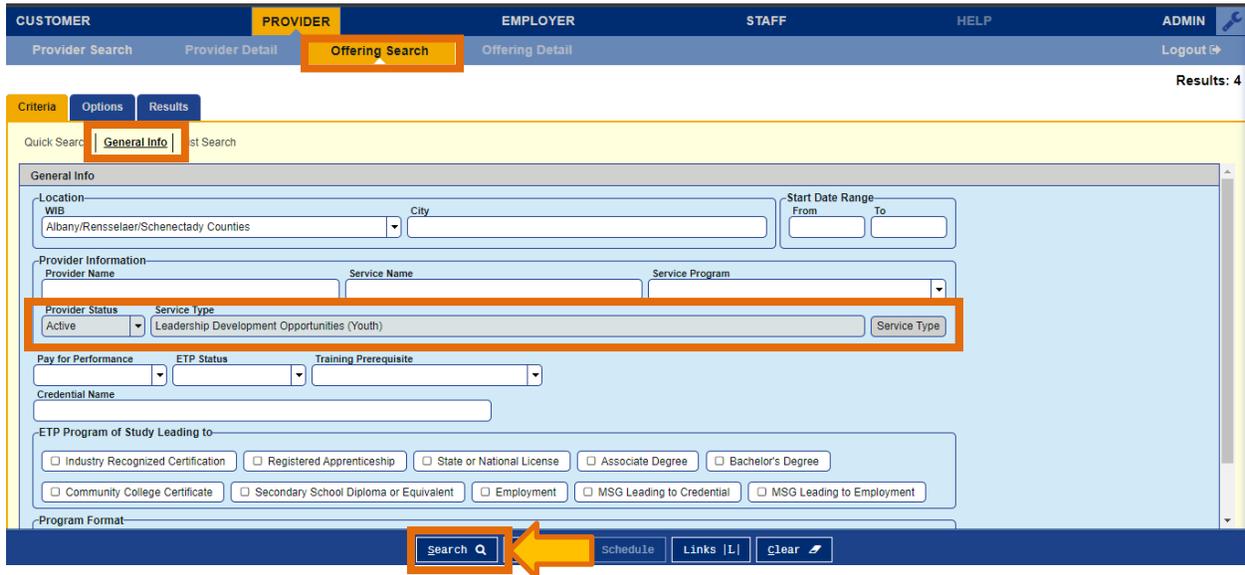
Select the appropriate Category and Service Type. Click **Select** at the bottom of the screen.



OFFERING SELECTION

When the appropriate Service Type has been selected, it will populate the **Service Type** field in the **Offering Search** window, on the **General Info** tab.

Click the **Search** button at the bottom of the screen to generate the list of the available offerings.

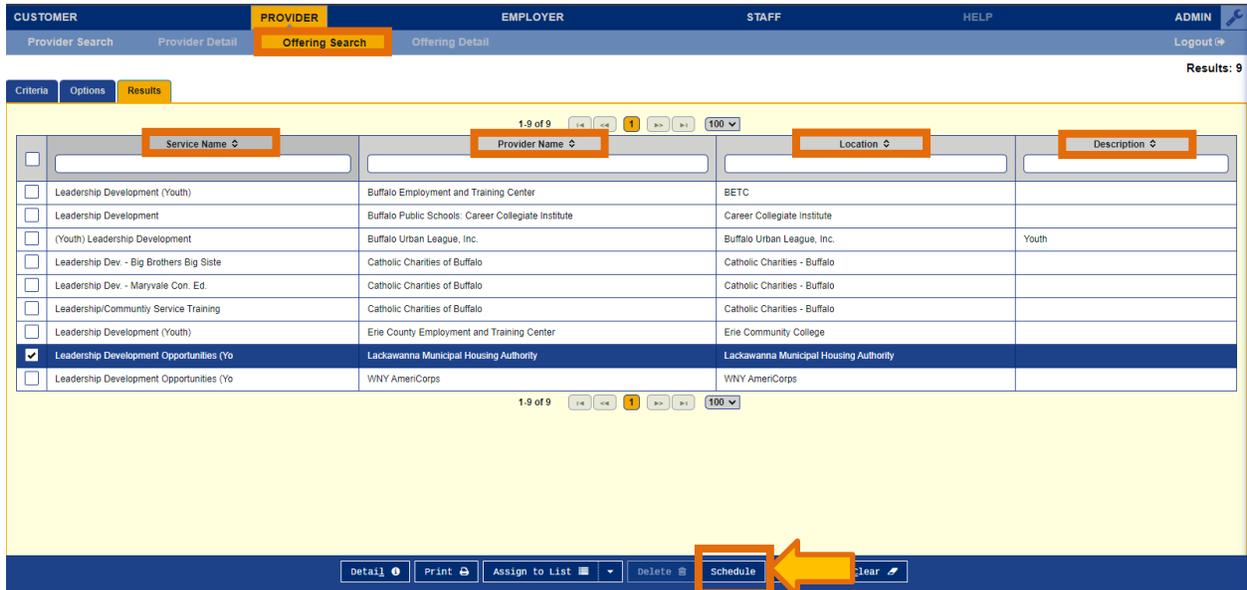


The screenshot shows the OSOS web application interface for the 'Offering Search' function. The top navigation bar includes 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', 'HELP', and 'ADMIN'. The 'PROVIDER' section is active, with sub-tabs for 'Provider Search', 'Provider Detail', 'Offering Search', and 'Offering Detail'. The 'Offering Search' tab is selected. Below the navigation, there are tabs for 'Criteria', 'Options', and 'Results'. The 'General Info' tab is selected, and the 'Quick Search' field is set to 'General Info'. The 'General Info' form contains several fields: 'Location' (WIB, Albany/Rensselaer/Schenectady Counties), 'City', 'Start Date Range' (From, To), 'Provider Information' (Provider Name, Service Name, Service Program), 'Provider Status' (Active), 'Service Type' (Leadership Development Opportunities (Youth)), 'Pay for Performance', 'ETP Status', 'Training Prerequisite', 'Credential Name', and 'ETP Program of Study Leading to' (Industry Recognized Certification, Registered Apprenticeship, State or National License, Associate Degree, Bachelor's Degree, Community College Certificate, Secondary School Diploma or Equivalent, Employment, MSG Leading to Credential, MSG Leading to Employment). The 'Search' button at the bottom is highlighted with a red box and a yellow arrow pointing to it.

SCHEDULING AN OFFERING

After clicking the **Search** button, a list of available offerings for that Service Type will appear in the search results. Choose the appropriate offering based on the provider, service name, location, and description.

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

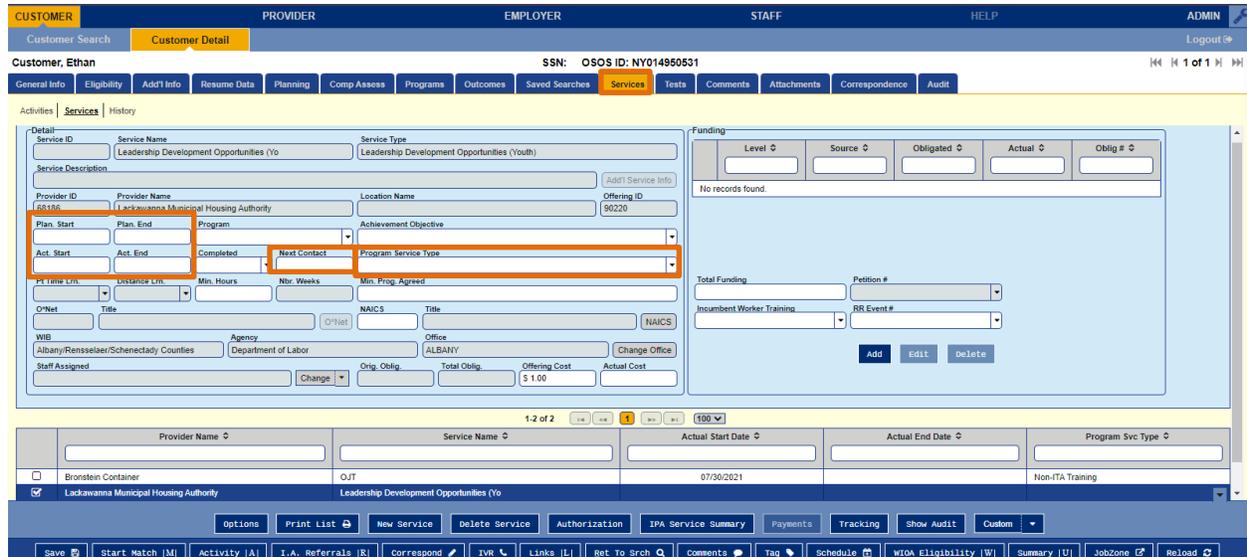


The screenshot displays the 'Offering Search' results page. The top navigation bar includes 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', 'HELP', and 'ADMIN'. The 'PROVIDER' tab is selected, and the 'Offering Search' sub-tab is active. The search results are displayed in a table with the following columns: Service Name, Provider Name, Location, and Description. The table contains 9 rows of data. The 8th row is selected, and the 'Schedule' button at the bottom is highlighted with a red box and a red arrow pointing to it.

Service Name	Provider Name	Location	Description
<input type="checkbox"/> Leadership Development (Youth)	Buffalo Employment and Training Center	BETC	
<input type="checkbox"/> Leadership Development (Youth) Leadership Development	Buffalo Public Schools: Career Collegiate Institute	Career Collegiate Institute	
<input type="checkbox"/> (Youth) Leadership Development	Buffalo Urban League, Inc.	Buffalo Urban League, Inc.	Youth
<input type="checkbox"/> Leadership Dev. - Big Brothers Big Sisters	Catholic Charities of Buffalo	Catholic Charities - Buffalo	
<input type="checkbox"/> Leadership Dev. - Maryvale Con. Ed.	Catholic Charities of Buffalo	Catholic Charities - Buffalo	
<input type="checkbox"/> Leadership/Community Service Training	Catholic Charities of Buffalo	Catholic Charities - Buffalo	
<input type="checkbox"/> Leadership Development (Youth)	Erie County Employment and Training Center	Erie Community College	
<input checked="" type="checkbox"/> Leadership Development Opportunities (Youth)	Lackawanna Municipal Housing Authority	Lackawanna Municipal Housing Authority	
<input type="checkbox"/> Leadership Development Opportunities (Youth)	WNY AmeriCorps	WNY AmeriCorps	

DATES AND PROGRAM SERVICE TYPES

Once the service has been scheduled, it will be attached to the youth record and the customer's Customer Detail window will again display. Details of the service must now be entered. This is done within the **Customer** module, under the **Services** window, on the **Services** tab. The Provider Name, Location Name, Provider ID and Offering ID will populate in the **Detail** section.



The following information is required and must be entered in the **Detail** section:

- **Planned Start Date** – Anticipated date the Youth Service is expected to start.
- **Planned End Date** – Anticipated date the Youth Service is expected to end.
- **Actual Start Date** – Date the Youth Service begins. NOTE: A service cannot be funded prior to the Actual Start Date.
- **Actual End Date** - Date the Youth Service ends. A future date cannot be entered, so if the service will end in the future, staff must return to the service and update this field at that time.
- **Program Service Type** – All WIOA Youth Services, except for Follow-Up, must be entered as Youth Services.

The **Next Contact Date** is not required but should be completed as a best practice. Entering a date in this field will generate a reminder that will be sent to the Inbox in the **Staff** module of OSOS for any service details that require additional attention.



Entering an Actual End Date on an offering will end the service. If no additional services or activities are added, the record will exit enrollment 90-days after the last Actual End Date has been entered into the Services tab.



The **Program** field must also be updated if an Occupational Skills Training service is being recorded for a Youth customer.

To correctly record an Occupational Skills Training Service funded through the WIOA Youth Program, select **Youth Services** in the **Program Service Type** drop-down and **Youth ITA Waiver** in the **Program** drop-down as shown in the screenshot below. This is the only way to enter a Youth ITA, fund the training with WIOA Youth funds, and ensure that it is reported correctly.

NOTE: Occupational Skills Trainings or Youth ITAs can only be provided to Out-of-School Youth (OSY).

The screenshot displays the OSOS system interface for a customer named Ethan. The 'Services' tab is active, showing a list of services. The 'Program' dropdown menu is open, with 'Youth ITA Waiver' selected. The 'Program Service Type' dropdown is also open, with 'Youth Services' selected. The 'Funding' section shows 'Total Funding' and 'Petition #' fields. The 'Incumbent Worker Training' dropdown is also open, with 'RR Event #' selected. The 'Add', 'Edit', and 'Delete' buttons are visible at the bottom of the 'Funding' section.



FOLLOW-UP EXCEPTION

All WIOA Youth services except Follow-Up services must be recorded with the Program Service Type of Youth Services. Follow-up services must be recorded with Program Service Type of Follow-Up.

Staff are required to provide Follow-up services to youth for a minimum of one year after the last program element service is provided. Under WIOA, there are five allowable service elements that can be provided to youth as Follow-up Services.

In the **Follow-Up Services Element** folder, the five allowable Follow-up Service Types are listed. In addition, the 'Follow-up Non-Element (Youth)' service type is listed and should be recorded when a concrete Follow-up Service outside of the five allowable elements was provided. Contacting the youth's school counselor to check-in and discuss the youth's progress is an example of when staff should select the "Follow-up Non-Element (Youth)". This service type should not be selected when there was no concrete service provided. For instance, contacting the youth to update address information would not be appropriate use of the "Follow-up Non-Element (Youth)" service type.

Select Seeker Service Type

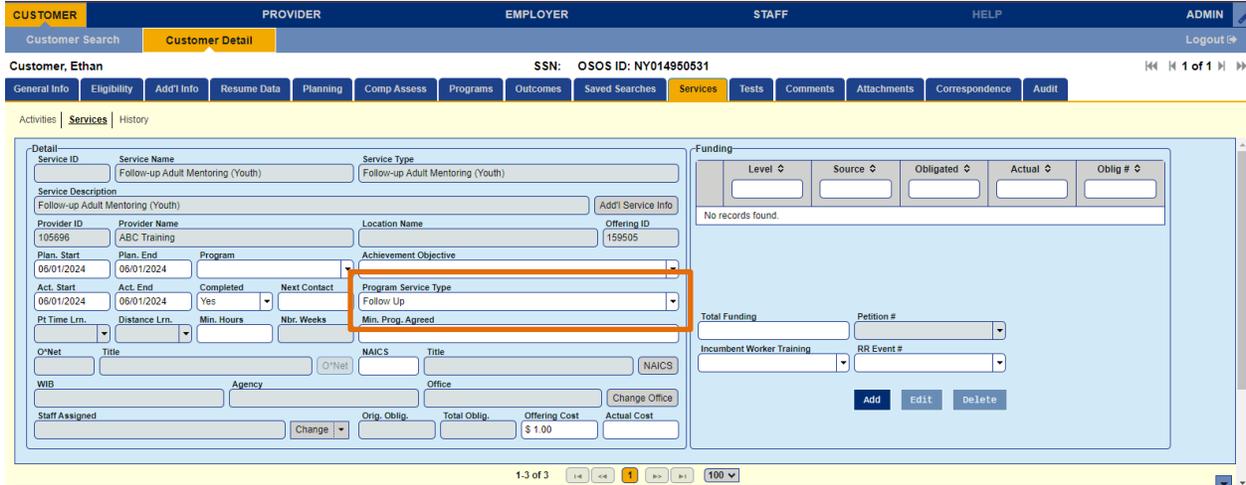
- ▼ L2 WIOA Youth Services
 - ▶ Design Framework
 - ▶ Adult Mentoring Element
 - ▶ Alternative Secondary School/Dropout Recovery for HS Equivalency Element
 - ▶ Comprehensive Guidance and Counseling Element
 - ▶ Entrepreneurial Skills Training Element
 - ▶ Financial Literacy Education Element
 - ▼ Follow-up Services Element
 - Follow-up Adult Mentoring (Youth)
 - Follow-up Financial Literacy (Youth)
 - Follow-up Labor Market and Employment Information (Youth)
 - Follow-up Postsecondary Transition (Youth)
 - Follow-up Supportive Services (Youth)
 - Follow-up Non-Element (Youth)
 - ▶ Integrated Ed./Education Concurrent with Workforce Preparation Element
 - ▶ Labor Market and Employment Information Element
 - ▶ Leadership Development Opportunities Element
 - ▶ Occupational Skills Training Element
 - ▼ Postsecondary Education/Training Preparation and Transition Element
 - Postsecondary Education/Training Preparation and Transition

Keyword(s)

Search Reset Select

Clear Cancel

Select **Follow Up** from the **Program Service Type** drop-down. This is selected to prevent the Follow-up service from extending an enrollment or creating a new enrollment.



The screenshot shows the OSOS Customer Detail page for 'Customer, Ethan'. The 'Program Service Type' dropdown menu is highlighted with an orange box and set to 'Follow Up'. The page includes various tabs like 'General Info', 'Eligibility', 'Add'l Info', 'Resume Data', 'Planning', 'Comp Assess', 'Programs', 'Outcomes', 'Saved Searches', 'Services', 'Tests', 'Comments', 'Attachments', 'Correspondence', and 'Audit'. The 'Services' tab is active, showing a list of services with columns for Level, Source, Obligated, Actual, and Oblig #. The 'Program Service Type' dropdown is currently set to 'Follow Up'.



Do not select "Youth Services" as the Program Service Type to record a Follow-up service. Only use "Follow Up" when recording a Follow-up service.



ACHIEVEMENT OBJECTIVE

All Youth Services are required to have an associated Achievement Objective. An Achievement Objective must be created prior to entering the service, so that it is available in the **Achievement Objective** dropdown menu.

The screenshot shows the OSOS Customer Detail window for Customer Ethan (SSN: NY014950531). The Services tab is active, displaying a form for a service named 'Leadership Development Opportunities (Youth)'. The Achievement Objective dropdown menu is highlighted with an orange box, showing the option 'Obtain Work and Gain experience in the Electric Field'. The form includes fields for Service ID, Service Name, Service Type, Provider ID, Provider Name, Location Name, Offering ID, Plan Start, Plan End, Program, Act. Start, Act. End, Completed, Next Contact, PI Time Lm., Distance Lm., Min. Hours, Nbr. Weeks, O'Net, Title, NAICS, Title, NAICS, WIB, Agency, Office, Staff Assigned, and Offering Cost.

If the appropriate Achievement Objective is not available from the drop-down selection, it must be created prior to saving the service. This is done from the **Customer Detail** window, under the **Planning** tab, **Achievement Objectives** Link.

Click **New Objective**.

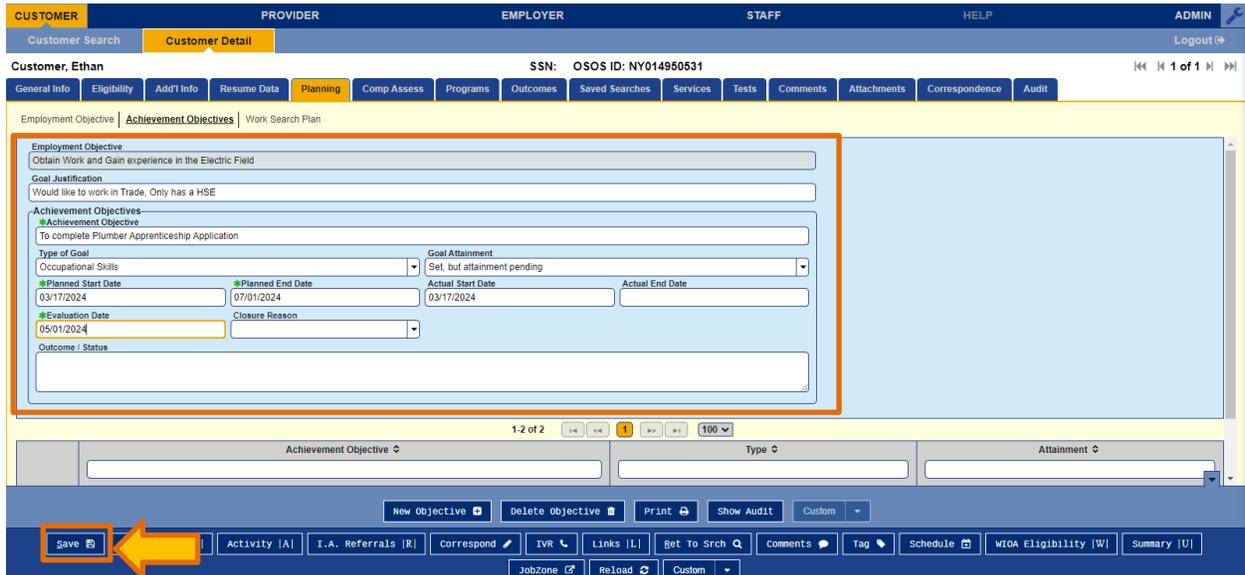
The screenshot shows the OSOS Customer Detail window for Customer Ethan (SSN: NY014950531) with the Planning tab active. The Achievement Objectives link is highlighted with an orange box. The New Objective button is highlighted with an orange arrow. The form includes fields for Employment Objective, Goal Justification, Achievement Objectives, Type of Goal, Goal Attainment, Planned Start Date, Planned End Date, Actual Start Date, Actual End Date, Evaluation Date, Closure Reason, and Outcome / Status.

In the **Achievement Objectives** section, enter the following fields:

- Achievement Objective name
- Type of Goal
- Goal Attainment
- Planned Start Date
- Planned End Date
- Evaluation Date

Click **Save**.

This Achievement Objective will now be available from the drop-down menu when entering Service Details on the **Services** tab.



The screenshot shows the OSOS system interface for a customer named Ethan. The 'Achievement Objectives' section is highlighted with a yellow border. The form contains the following fields and values:

- Employment Objective:** Obtain Work and Gain experience in the Electric Field
- Goal Justification:** Would like to work in Trade, Only has a HSE
- Achievement Objectives:** To complete Plumber Apprenticeship Application
- Type of Goal:** Occupational Skills
- Goal Attainment:** Set, but attainment pending
- Planned Start Date:** 03/17/2024
- Planned End Date:** 07/01/2024
- Actual Start Date:** 03/17/2024
- Actual End Date:** (empty)
- Evaluation Date:** 05/01/2024
- Closure Reason:** (empty)
- Outcome / Status:** (empty)

A yellow arrow points to the 'Save' button at the bottom left of the interface.



As a best practice, staff working with a youth should record goals established on the Individual Services Strategy (ISS) as Achievement Objectives. The Print button at the bottom of the screen allows staff to print all the Achievement Objectives so that the youth can be provided with a copy to keep. Also, the occupational and academic components of a work experiences can be recorded as Achievement Objectives.



FUNDING A SERVICE

After the required service details have been saved, funding for the service must be entered in the **Funding** section of the **Services** tab.

Enter 1 in the **Total Funding** field.

Click **Add**.

The screenshot shows the OSOS interface for a service. The 'Services' tab is active, and the 'Funding' section is visible. The 'Total Funding' field is set to '\$ 1.00'. The 'Add' button is highlighted with a red box and an arrow. The 'Funding' table is empty, showing 'No records found.'

Level	Source	Obligated	Actual	Oblig #
No records found.				

Total Funding: \$ 1.00

Incumbent Worker Training

Add



This will open the **Funding** box.

From the list of available Funding Sources, select **WIOA Youth Local** with the appropriate Program Year.

Enter 1 in the **Obligated Amount** field.

The **Obligated Percentage** will auto fill. Click **OK**.

Funding ✕

	Level ⇅	Funding Source ⇅	Year ⇅	Remaining ⇅	NEG/Contract/Grant# ⇅
<input type="checkbox"/>	WIB	WIOA Adult Local	2021	99989	
<input type="checkbox"/>	WIB	WIOA Adult Local	2022	99988	
<input type="checkbox"/>	WIB	WIOA Adult Local	2023	99993	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2021	99999	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2022	99995	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2023	99998	
<input type="checkbox"/>	WIB	WIOA Youth Local	2021	99999	
<input type="checkbox"/>	WIB	WIOA Youth Local	2022	99998	
<input checked="" type="checkbox"/>	WIB	WIOA Youth Local	2023	100000	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2021	00000	

Obligated Amount
1.00

Obligated Percentage OR
100.00

WIB
Albany/Rensselaer/Schenectady Counties

Office
ALBANY

Region
Capital District

OK 1



WIOA Youth Local funding will not be available to select unless the customer's record reflects WIOA Youth Program eligibility.



Review service details to ensure proper data entry and click **Save** when complete.

CUSTOMER PROVIDER EMPLOYER STAFF HELP ADMIN

Customer Search **Customer Detail** Logout

Customer, Ethan SSN: OSOS ID: NY014950531 1 of 1

General Info Eligibility Add'l Info Resume Data Planning Comp Assess Programs Outcomes Saved Searches **Services** Tests Comments Attachments Correspondence Audit

Activities | **Services** | History

Detail

Service ID: 83184 Service Name: Leadership Development Opportunities (Yo) Service Type: Leadership Development Opportunities (Youth)

Service Description: Add'l Service Info

Provider ID: 68186 Provider Name: Lackawanna Municipal Housing Authority Location Name: Lackawanna Municipal Housing Authority Offering ID: 90220

Plan Start: 03/01/2024 Plan End: 07/01/2024 Program: Youth ITA Waiver Achievement Objective: Obtain Work and Gain experience in the Electric Field

Act. Start: 03/01/2024 Act. End: Completed Next Contact: Program Service Type: Youth Services

Pt Time Lm. Distance Lm. Min. Hours Nbr. Weeks Min. Prog. Agreed

O'Net Title NAICS Title NAICS

WIB Albany/Rensselaer/Schenectady Counties Agency: Department of Labor Office: ALBANY Change Office

Staff Assigned: Buckley, Ryan Change Orig. Oblig. Total Oblig. Offering Cost: \$ 1.00 Actual Cost

Funding

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WIB WIOA Youth Local	1		113083

Total Funding: \$ 1.00 Petition #
Incumbent Worker Training RR Event #

Add Edit Delete

1-3 of 3 100

options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking Show Audit Custom

Save M Activity |A| I.A. Referrals |R| correspond IVR Links |L| Bet To Srch Comments Tag Schedule WIOA Eligibility |W| Summary |U|

JobZone Reload Custom

ENROLLMENT VERIFICATION

If the entry of the service generates a new enrollment, the **Enrollment Verification** pop-up will appear. Review the information on the **Customer Detail** and **Comp Assess** tabs. Verify all data is correct and update as required.

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

✕
Enrollment Verification

Customer Detail

Comp Assess

Audit

General Information

OSOS ID: NY014950531 Seeker Status: Active

*Gender: Male U.S. Citizen

Alien Reg # Expires Permanent

*Education Level: High School Equivalency

*School Status: Not Attending School; Secondary School Graduate/Equivalent

*Employment Status: Not Employed

Underemployed Long Term Unemployed

UI Claimant: None (Not Claiming UI)

Profiled Profiled Date

*Ethnic Heritage: Hispanic or Latino Not Hispanic or Latino Not Disclosed

Race: Alaskan or American Indian Asian()

Migrant

Migrant/Seasonal Worker: Yes No

Migrant Class

Farmwork Type

Empl. in Farmwork

Farmwork Threshold

Military Service

Service Veteran:

Selective Service?:

Programs

HVRP Grantee

HVRP Grantee #2

Reason

HVRP Grantee #3

Eligibility Data Effective Date: 08/08/2024

Apply Updates to Customer Record

Apply Updates Thru Today: 08/08/2024

Apply Updates Thru This Date:

Save





*Adding or correcting information in the **Enrollment Verification** box will update the **Customer Detail** and **Comprehensive Assessment** windows. Make sure to record all known barriers at the time of enrollment. This will ensure an accurate OSOS record for the youth and assist staff with appropriate service delivery. It will also provide an accurate information on barriers faced by the local area's target populations to appropriately adjust performance goals.*



ADD SENSE COMMENTS

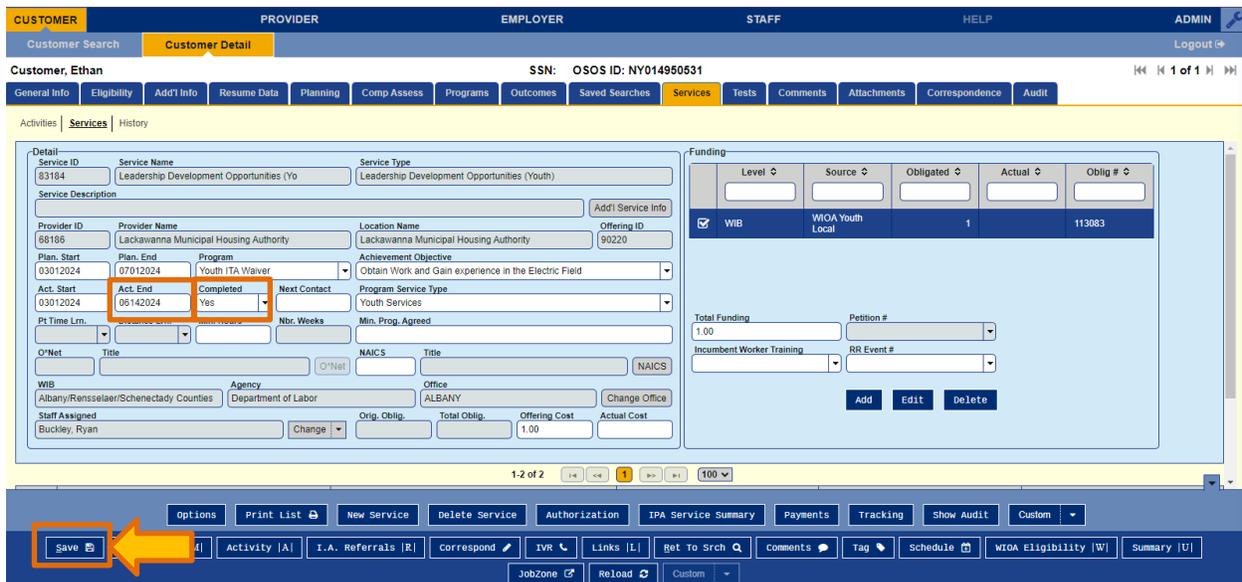
After attaching any service, or to record each interaction you have with a youth, write effective and quality case notes in OSOS using the Situation, Evaluation, Next Steps, Sufficient Information, Employment-Related Information Only (SENSE) Model.

See the [Resources section](#) for guides on using the SENSE Model.

CLOSING THE YOUTH SERVICE

If an Actual End Date was not entered when the service was added to the customer's record, it must be entered once the service has ended. This closes the service.

To close the service in OSOS, enter the **Actual End Date** and select a completion status in the **Completed Successfully** field. Then click **Save** at the bottom of the screen.



The screenshot shows the OSOS interface for a customer named Ethan. The 'Services' tab is active, and the 'Detail' section is expanded. The 'Act. End' field is set to 06142024, and the 'Completed' status is selected. The 'Save' button is highlighted with a red arrow. The 'Funding' table shows a single entry for WIB with a total obligation of 1.00.

Level	Source	Obligated	Actual	Oblig #
WIB	WIOA Youth Local	1		113083



If there are no open services, then the automatic 90-day exiting process will start as of the Actual End Date of the last service. Please note that Follow-up Services provided to the youth should begin when the last service ends. Along with entering Follow-up Services, staff should also enter any performance measure outcomes the youth achieved during the program or will achieve after the last service has been provided. For more information on recording outcomes, go to the [Resources](#) section below and follow the website link for additional OSOS Guides.



BEST PRACTICES FOR ENTERING SERVICES

- Next Contact Date – Staff are urged to use the Next Contact Date field under the Customer Module, Services Window, Services Tab. This will set a reminder in the Staff Inbox to touch base with the youth and/or update the service depending on the youth’s status.
- Planned end dates – Under the Customer Module, Services Window, Services Tab, staff often place an extended amount of time in the Planned End Date field. The extended service time may cause staff to forget the open service that is attached to the youth record, resulting in poor service quality which may keep the youth in the Performance Measures when he/she has already achieved his/her goals in the WIOA program. It is recommended that shorter time frames are used when developing planned end dates correlating with the youth’s Individual Service Strategy.
- Achievement Objectives – Under the Customer Module, Services Window, Services Tab, staff assign an Achievement Objective that serves as a goal, in relation to the Individual Services Strategy. Make sure the services provided align with the entered Achievement Objectives.
- Service Designation – There are no specific requirements for LWDA’s when naming services. However, if there are multiple Youth Program providers for one LWDA, it is recommended that similar services are uniformly named across the providers. For example, a LWDA may have three Youth Program providers who provide tutoring. The LWDA could name this service “Youth Tutoring- Improving Basic Skills” for all three providers.
- If a LWDA has changed youth providers (e.g. due to the issuance of a new Request for Proposal) it is important to ensure services are entered under the correct providers.
- L2 WIOA Youth Services – Some local services could fit into multiple WIOA Youth Program Elements. Report the service under a Service Type that best fits the definition of services described in Training and Employment Guidance Letter 21-16.



RESOURCES AND ASSISTANCE

For details on the WIOA 14 elements read TEGL 21-16:

https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=7159

Desk Guide for Provider Module Data Entry and Maintenance (page 28)

<https://labor.ny.gov/workforcenypartners/osos/osos-desk-guide-provider-module.pdf>

SENSE Comments – [Write effective and quality case notes in OSOS using the Situation, Evaluation, Next Steps, Sufficient Information, Employment-Related Information Only \(SENSE\)](#)

Additional program information, OSOS guides and other resources can be found at:

<https://labor.ny.gov/workforcenypartners/osos.shtm>

For further assistance with data entry, please contact the OSOS Help Desk:

By phone: (518) 457-6586

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

For questions related to Youth programs, please contact the NYSDOL Program Development Office, Youth Team By email: youthoffice@labor.ny.gov