Empire State Development (ESD) Custom OSOS Guide

TABLE OF CONTENTS

PURPOSE

The OSOS (One Stop Operating System) is the primary case management system used for tracking all services provided to customers throughout the Workforce Development System. Phased Technical Refresh (PTR) 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, and the data entry necessary for the Empire State Development (ESD) Custom Tab.

If you are a new OSOS user, please see the guide on https://dol.ny.gov/system/files/documents/2024/10/osos-accessing-the-system-guide.pdf for information regarding setting up an account, following confidentiality procedures, and performing the appropriate system setup.

Accounts are requested by sending an email to osos.wdtd@labor.ny.gov.

PTR is accessed through the following URL: https://ososptr.labor.ny.gov/ptr/

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 OSOS Customer Record. Instead, they must review the existing customer information and update it as necessary.

LOGGING IN
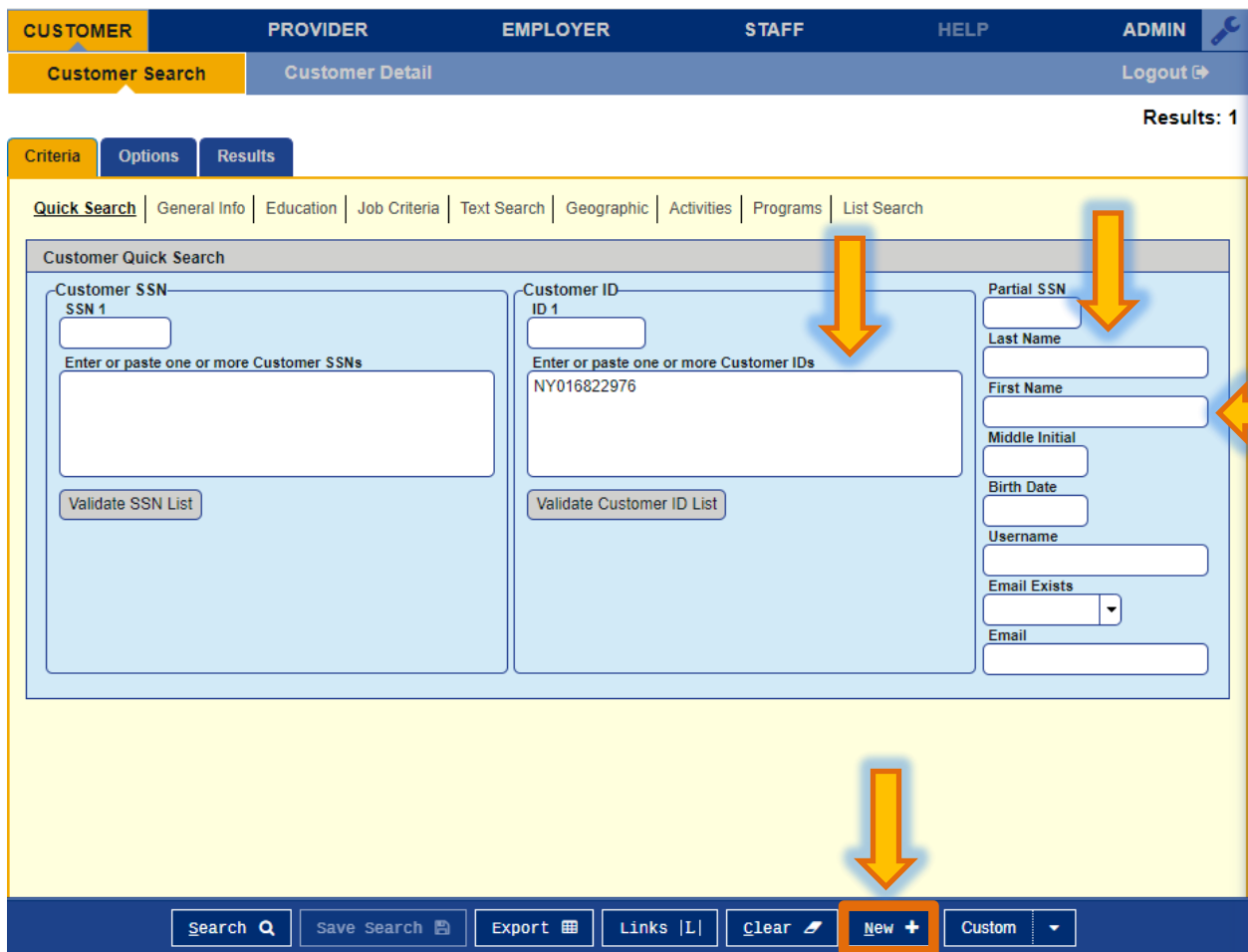
The OSOS website address providers should use is: https://ososptr.labor.ny.gov/ptr/.

CUSTOMER	PROVIDER	EMPLOYER	STAFF	HELP	ADMIN

Logout ⮕

AOSOS

America's One-Stop Operating System

v7.4.5 (3b9eb139)

Installed: 05/03/2024

Username❓

Password❓

Login ⮕

Supported Browsers ❓

Copyright © 2024 Americas's One-Stop Operating System (AOSOS) Service Center

![OSOS One-Stop Operating System logo]

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 Customer ID 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.

If a name search returns multiple records for the same customer, contact the OSOS help desk at help.osos@labor.ny.gov or 518-457-6586 to determine which record should be used.

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

- General Info
- Resume Data
- Programs
- Services
- Attachments

- Eligibility
- Planning
- Outcomes
- Tests
- Correspondence

- Additional Info
- Comp Assess
- Saved Searches
- Comments
- Audit

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 dot ● 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 Lvl** (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 actual 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 **OK**. If the SSN is not available, check **Not Disclosed** and click **OK**.

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

Username and Password: These fields are no longer functional but data must be entered here to complete the customer record.

Last Name, First Name, Date of Birth and Gender: Enter customer's information accordingly. For Gender, please choose from Not Disclosed, Female, Male and non-Binary. Gender has been updated to include non-Binary as one of the options to choose from.

Portfolio Lvl (level): This field defaults to the correct level based upon the customer's date of birth. Do not change this field.

Address, City, State, Zip: Enter customer's information accordingly. Other data fields of **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**

We do not collect this information in PTR. Enter "Z999999999" 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."

OR,

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

This will open the **Ethnic Heritage and Race Webpage** Dialog. The customer is not required to disclose this information but entry in the data field is required to complete the customer record. OSOS updated Asian and Hawaiian or Pacific Islander race options. 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.

Employment Status

Employed
Employed - Rcvd Notice of Termination
Not In Labor Force
Not Employed
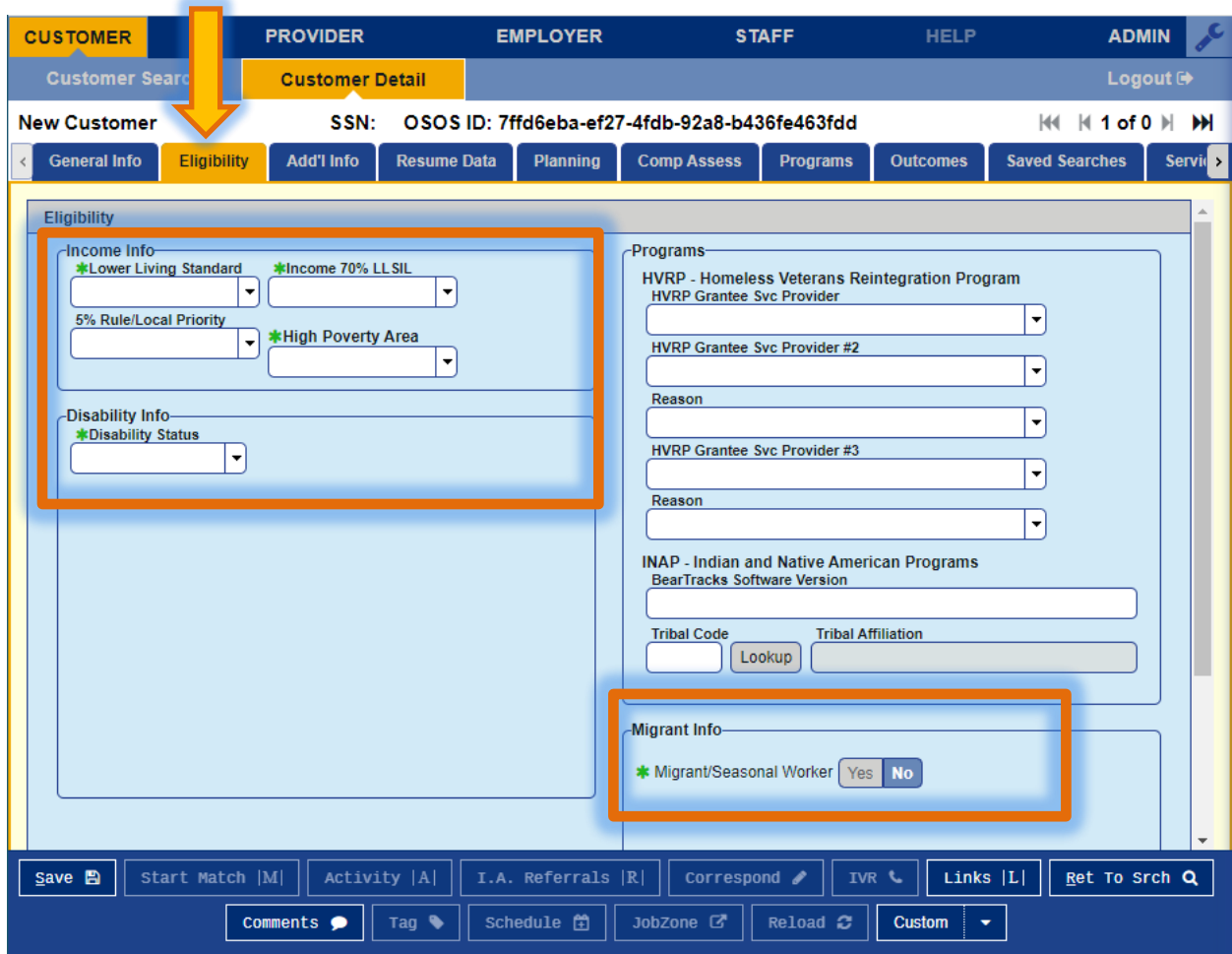
Contact Preferences: At least one preference is needed here and a postal address is required when enter a new customer in OSOS.

Contact Preferences

☐ Use Postal ☐ Pri. Phone ☐ Alt. Phone ☐ Fax

☐ Email

No further data is required on the **Gen. 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**. Select **Not Disclosed** for all required fields in the **Income Info** and **Disability Info** sections, and either **Yes or No** in the **Migrant Info** section.

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 Veteran Program Terms and Definitions and OSOS Guides for more information on completing this section.

Required Field: Selective Service. All males over the age of 18 must be registered with Selective Service. If the Selective Service number is available, select **Yes** and enter the customer's Selective Service number.

Selective Service
✳ Selective Service?   Selective Service Number
[Yes ▼]   [   ]   [Register/Lookup]

If the customer does not know their Selective Service number, or if Female, Non-Binary, or Not Disclosed is selected for gender on the General Info tab, select **Not Required**.
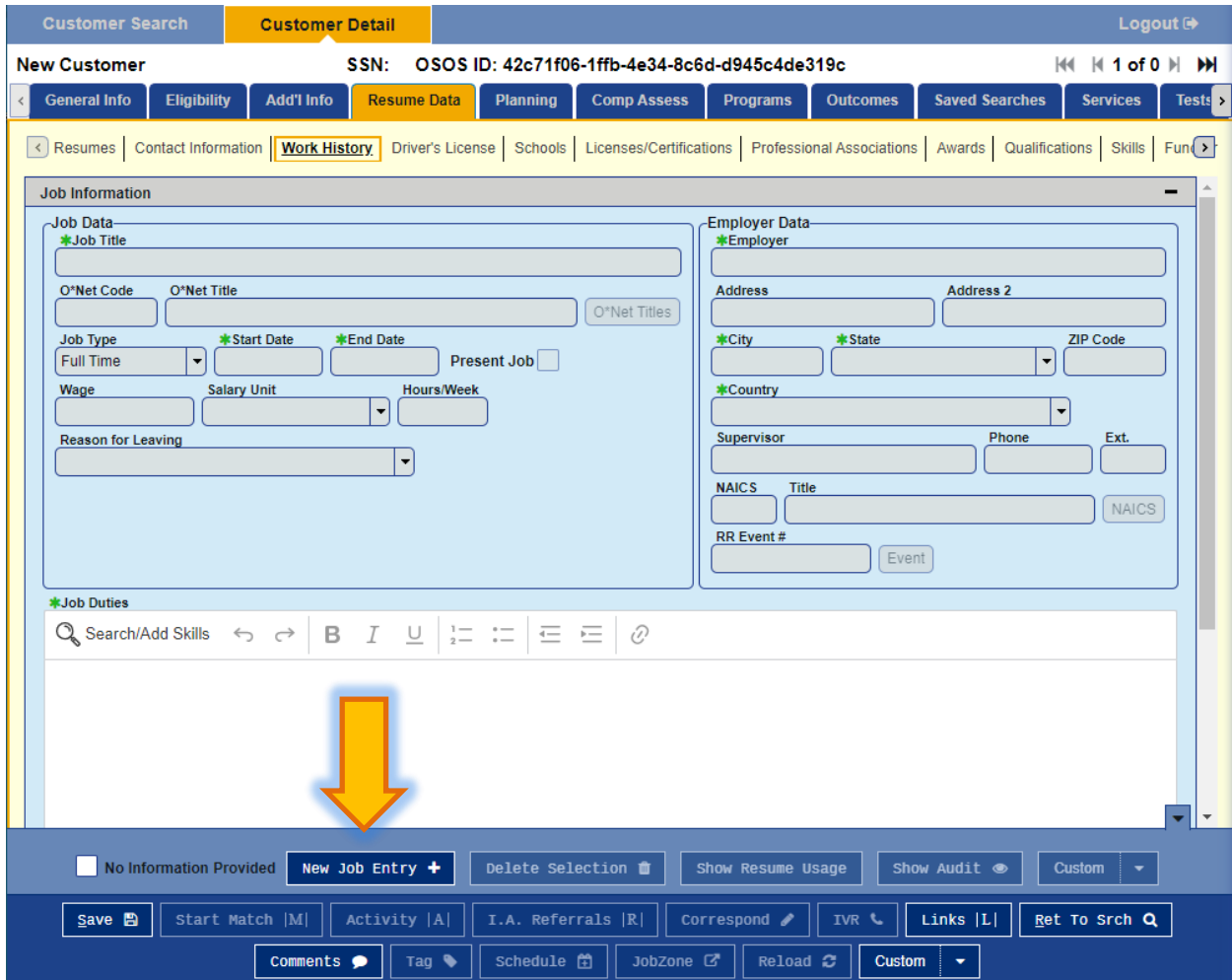
Selective Service
✳ Selective Service?
[Not Required ▼]

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

In the **Resume Data tab**, the **Work History link** needs to be completed. Within the **Work History** the required fields need to be filled out: **Job Title**, **Employer**, **Start Date**, **End Date**, **Address**, **City**, **State**, **Zip**, **Country**, **Wage**, **Reason for Leaving**, and **Job Duties**.

If the customer has a Work History, enter each position separately. Start each entry by clicking the **New Job Entry** button.
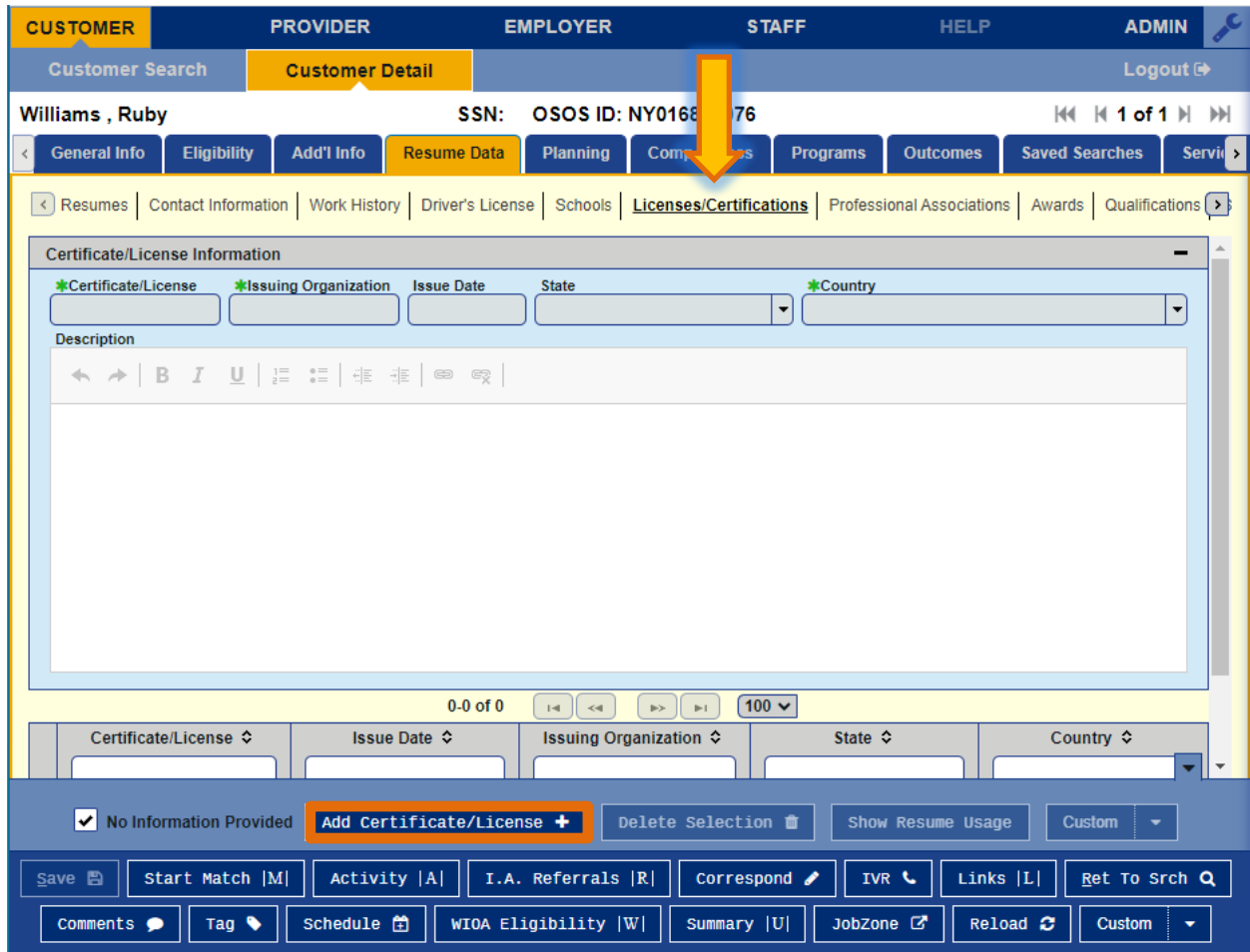
If a customer has no Work History or did not provide information, select **No Information Provided**.
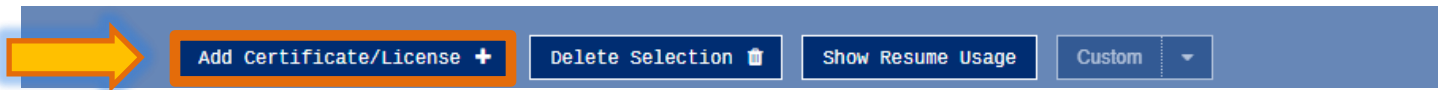
RESUME DATA TAB - LICENSES/CERTIFICATIONS

In the **Resume Data** tab, the **Licenses / Certifications** link needs to be completed. Within the **Licenses / Certifications** link the required fields need to be filled out: **Licenses / Certifications, Issuing Organization** and **Country**.

Start each entry by clicking on the **Add Certificate/License** +.

To view each entry, click on the check mark box.
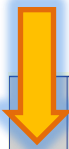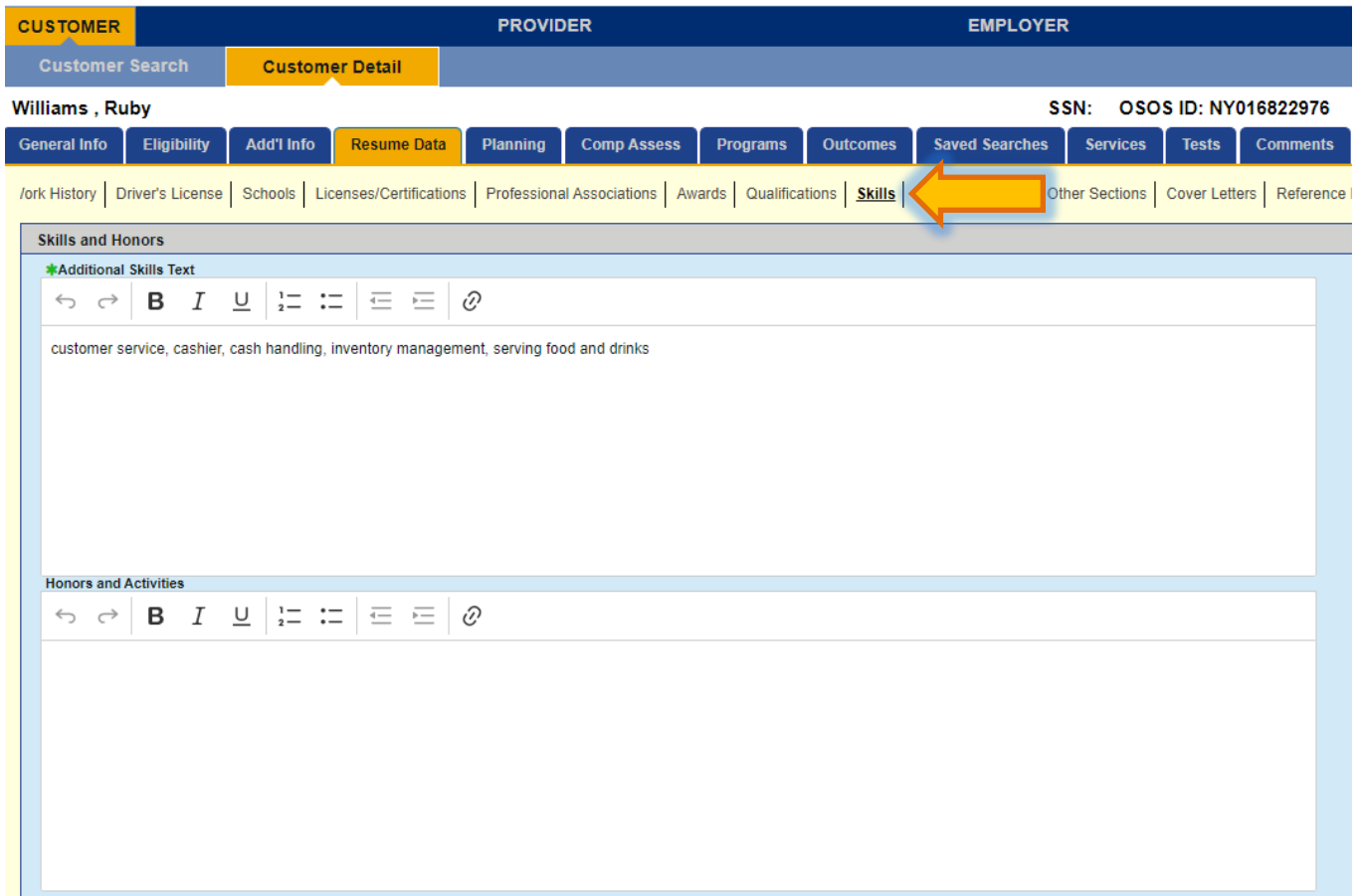
	Certificate/License ⇕	Issue Date ⇕	Issuing Organization ⇕	State ⇕	Country ⇕
☑				NY	US
☐				NY	US

RESUME DATA TAB - SKILLS

In the **Resume Data** tab, the **Skills** link needs to be completed. Within the **Skills** link the required fields need to be filled out: **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.

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

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

PLANNING TAB - EMPLOYMENT OBJECTIVE
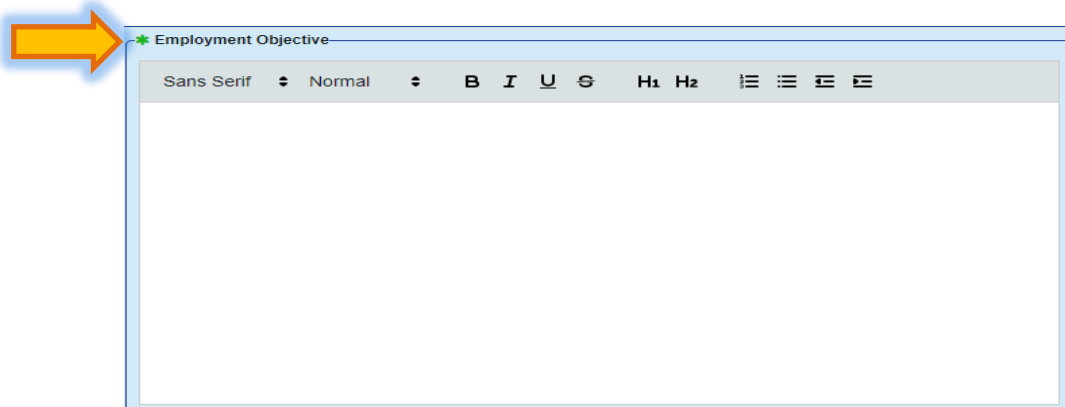
In the **Planning tab**, the **Employment Objective link** needs to be completed: Within the **Employment Objective,** the required fields need to be filled out: **Employment Objective**, **Desired O*Net**, and **Acceptable Job Locations**.

Employment Objective: This field is used to summarize the customer's employment objectives. 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**.
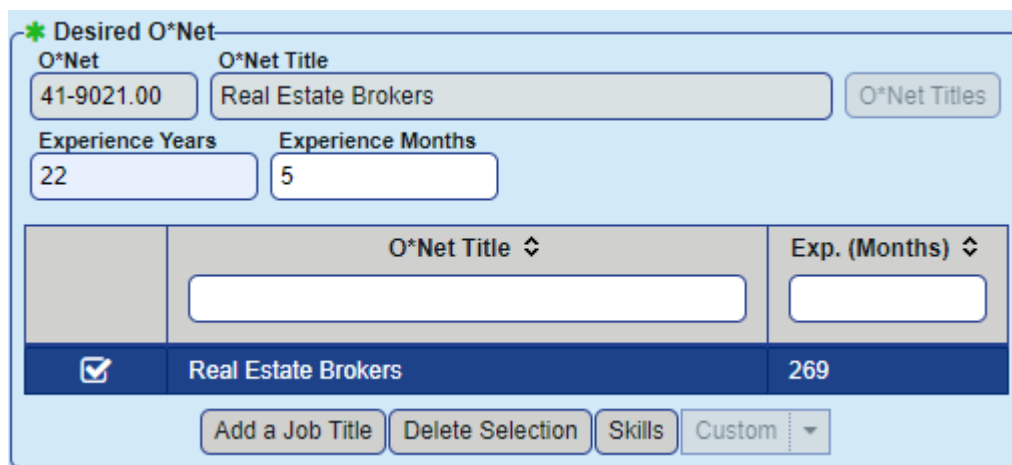
Once selected, the O*Net code and title then populate in the **Desired O*Net** fields of the **Planning** tab.
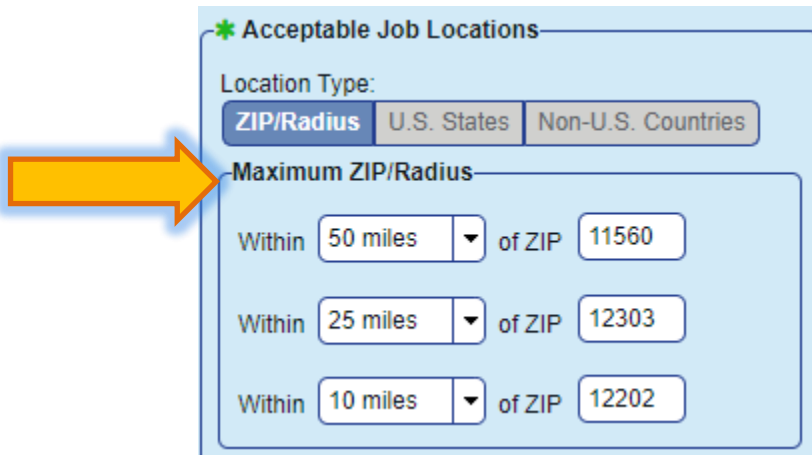
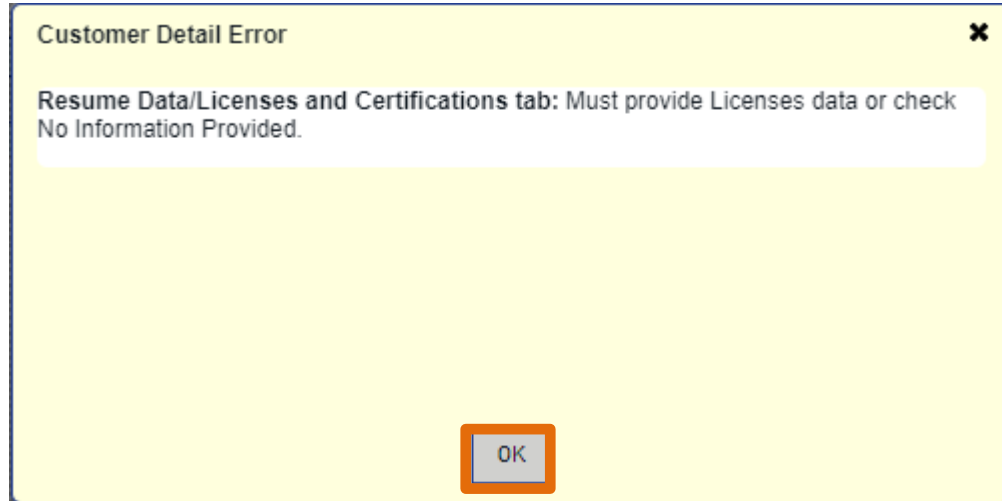**Acceptable Job Locations:** Indicate Maximum Zip Radius.
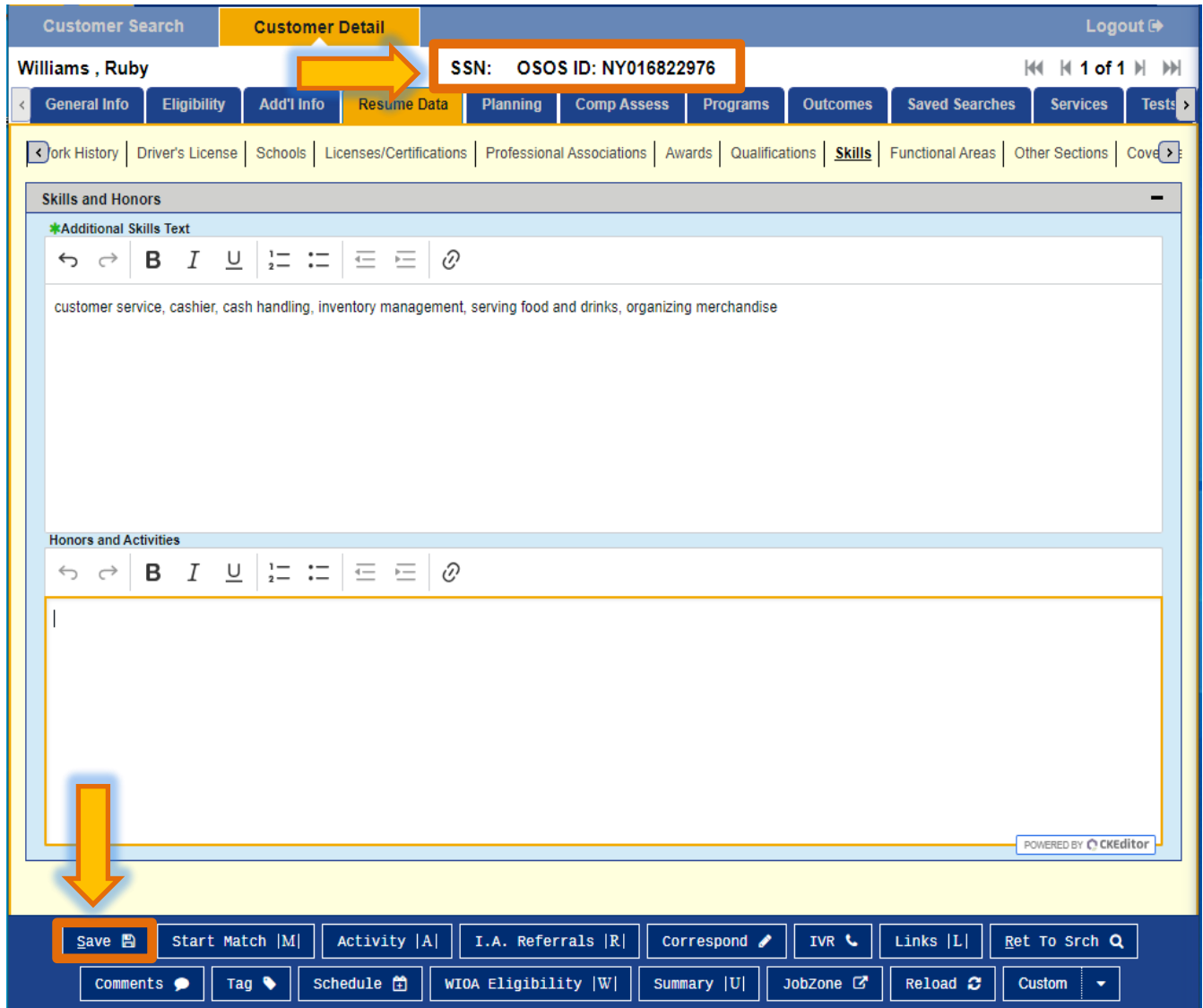
SAVING THE RECORD

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

![OSOS - One-Stop Operating System logo]

If any required data is missing, an OSOS Error Message appears indicating what information is required to successfully save the Customer Record. Click **OK**.
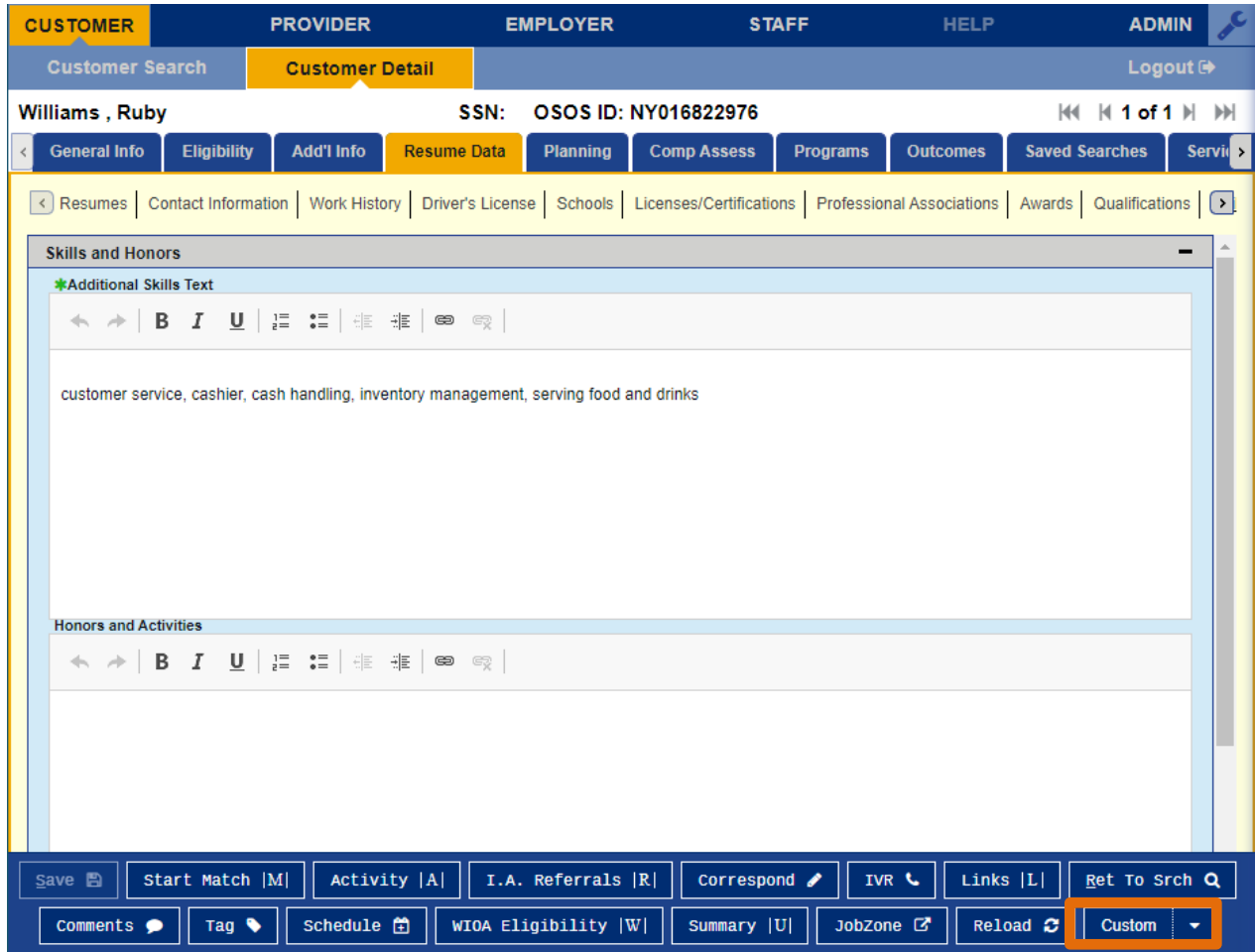
Customer Detail Error ✖

Resume Data/Licenses and Certifications tab: Must provide Licenses data or check No Information Provided.

OK

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

PARTICIPANT DATA ENTRY

Once the customer record has been located, or a new customer record has been created, navigate to the Custom button of the customer record which is located at the bottom right corner. The Custom button can be accessed in any of the tabs and links.

Click the Custom button and choose the ESD option.
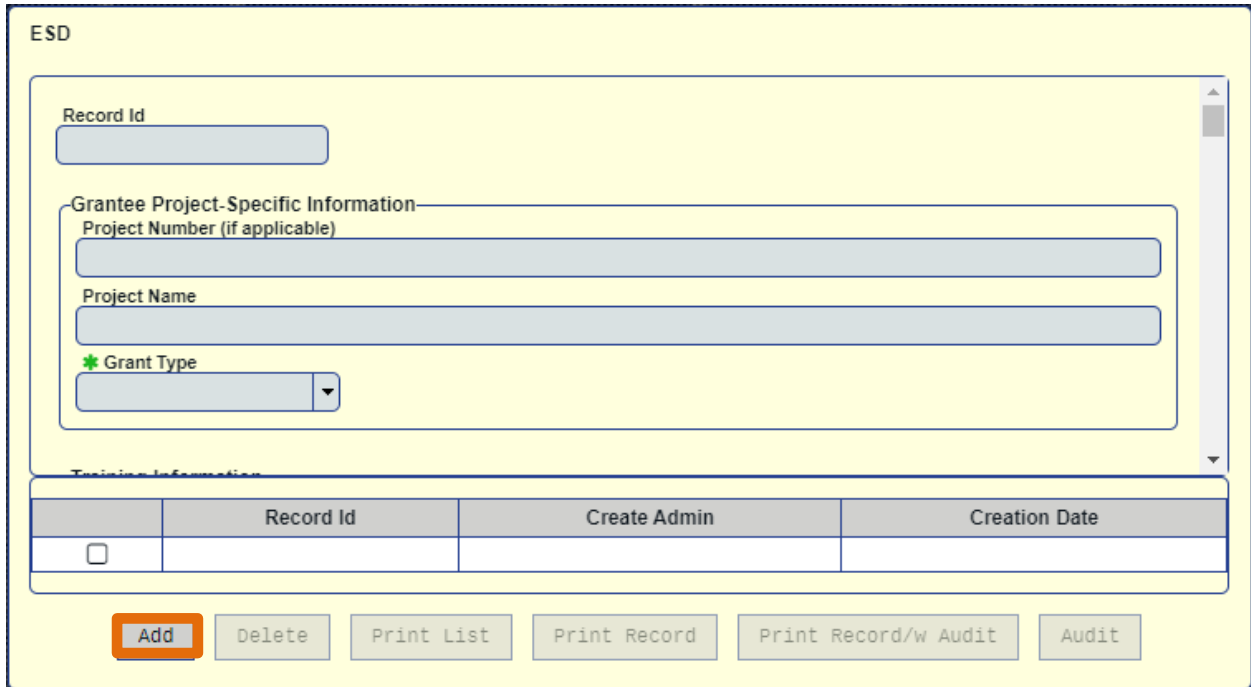
To begin entering grant specific information, click the **Add** button in the lower left side of the screen.

This will open up the fields and allow data to be entered. Go through each of the fields and enter in as much as the customer is willing to disclose. Once all relevant data has been recorded, click the **Save** button at the bottom of the screen to save this record.
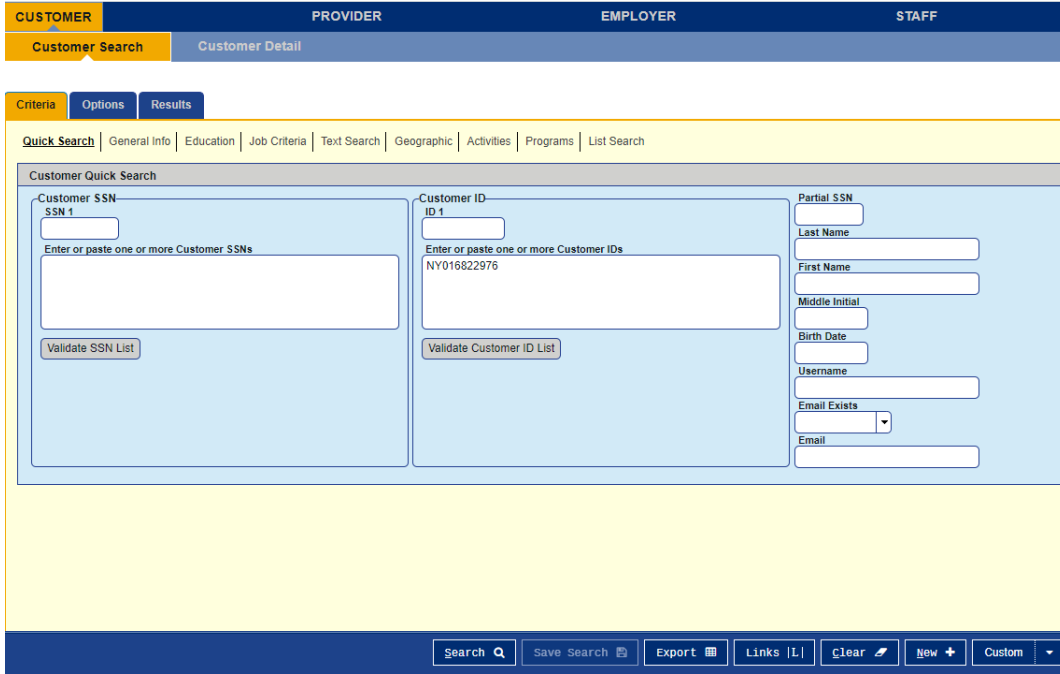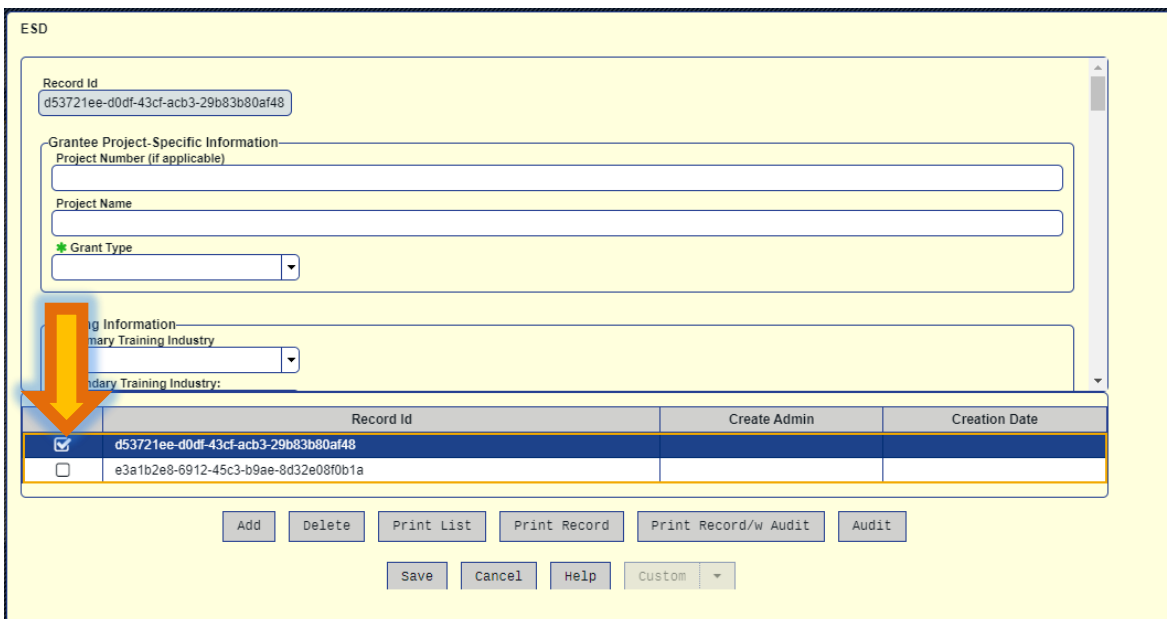
UPDATING A RECORD

In order to edit this record, or to add follow-up information, locate the customer record by searching by the customer's NY ID number from the Quick Search link in the Customer Search.

Navigate to the **ESD** in the custom button. The data fields will be greyed out until the record is selected by checking the box on the left side of the screen.

After the record has been selected, the fields on the right side of the screen will open up and data can be entered/edited as needed. Click save to save the ESD updated information.

Once the data has been updated/recorded, click the **Save** button at the bottom of the screen of the main record to save this record.

RESOURCES AND ASSISTANCE

For additional guides, please visit: https://dol.ny.gov/workforce-professionals-tools?f%5B0%5D=filter_term%3A811

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