

Empire State Development (ESD) Custom OSOS Guide



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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/>.

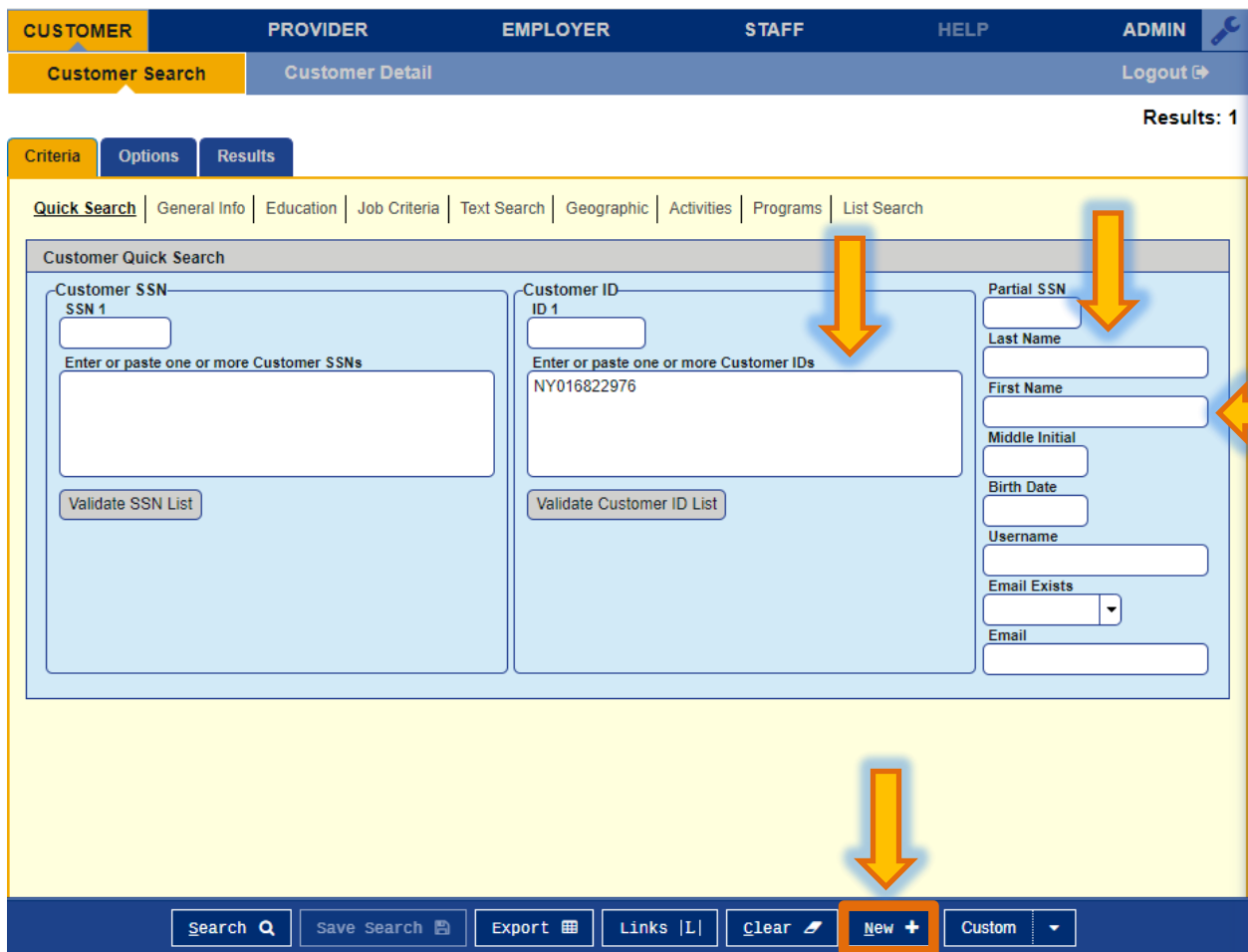
The screenshot shows the login interface for AOSOS. At the top, a dark blue navigation bar contains the following menu items: CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP, and ADMIN (with a wrench icon). A "Logout" link with an arrow icon is located in the top right corner. The main content area has a light yellow background and displays the following text: "AOSOS", "America's One-Stop Operating System", "v7.4.5 (3b9eb139)", and "Installed: 05/03/2024". Below this is a "Username" label with a help icon, followed by a text input field. Underneath is a "Password" label with a help icon, followed by another text input field. A dark blue "Login" button with a right-pointing arrow is centered below the fields. At the bottom, there is a link for "Supported Browsers" and a copyright notice: "Copyright © 2024 Americas's One-Stop Operating System (AOSOS) Service Center".

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 customer's 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.



The screenshot shows the OSOS Customer Search interface. At the top, there is a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP, and ADMIN. Below this, there are sub-tabs for Customer Search and Customer Detail. The main content area is titled 'Customer Quick Search' and contains several search criteria: Customer SSN, Customer ID, Partial SSN, Last Name, First Name, Middle Initial, Birth Date, Username, Email Exists, and Email. The 'Customer ID' field contains the value 'NY016822976'. At the bottom of the interface, there is a toolbar with buttons for Search, Save Search, Export, Links |L|, Clear, New +, and Custom. An orange arrow points to the 'New +' button. Other orange arrows point to the 'Customer ID' field, the 'First Name' field, and the 'Partial SSN' field.



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
- Eligibility
- Additional Info
- Resume Data
- Planning
- Comp Assess
- Programs
- Outcomes
- Saved Searches
- Services
- Tests
- Comments
- Attachments
- Correspondence
- Audit

GENERAL INFORMATION TAB

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

The screenshot shows the OSOS Customer Detail form for a new customer. The form is titled "New Customer" and displays the SSN: OSOS ID: 7ffd6eba-ef27-4fdb-92a8-b436fe463 added. The "General Info" tab is selected. The form is divided into several sections: Customer Data, Citizenship, Education & Employment, and Contact Preferences. Required fields are marked with a green dot. The bottom of the form has a navigation bar with buttons for Save, Start Match, Activity, I.A. Referrals, Correspond, IVR, Links, Ret To Srch, Comments, Tag, Schedule, JobZone, Reload, and Custom.



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.

CUSTOMER PROVIDER EMPLOYER STAFF HELP ADMIN

Customer Search Customer Detail Logout

New Customer SSN: OSOS ID: 7ffd6eba-ef27-4fdb-92a8-b436fe463fdd

General Info Eligibility Add'l Info Resume Data Planning Comp Assess Programs Outcomes Saved Searches Services

Customer Info

Customer Data

*SSN *Status Active *Job Seeker

*Username *Password *Ethnic Heritage and Race Merge

*Last Name *First Name MI

*Date of Birth *Gender *Portfolio Level JobZone Adult

*Address 1

Address 2

*City *State New York

*ZIP Code County Country United States

Metro

Phone Ext. Alt. Phone Ext. Fax

Email UURL Alt UURL

Citizenship

* U.S. Citizen

Education & Employment

*Education Level No Grade

*School Status

*Employment Status Underemployed Long Term Unemployed

Contact Preferences

Use Postal Pri. Phone Alt. Phone Fax

Email

Save Start Match |M| Activity |A| I.A. Referrals |R| Correspond IVR Links |L| Ret To Srch

Comments Tag Schedule JobZone Reload Custom



*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**.

The image shows two screenshots of the SSN form. The top screenshot shows the form with SSN and Confirm SSN fields containing '888-88-8888' and the 'Not Disclosed' checkbox unchecked. An orange arrow points to the SSN field. The bottom screenshot shows the form with empty SSN and Confirm SSN fields and the 'Not Disclosed' checkbox checked. An orange arrow points to the 'Not Disclosed' checkbox.

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."

Citizenship

U.S. Citizen

Permanent

Alien Reg # Z999999999 Expires 12/31/2199

OR,

Citizenship

U.S. Citizen

Permanent

Alien Reg # Z999999999 Expires

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

The screenshot shows the OSOS Customer Detail page. The 'Ethnic Heritage and Race' button is highlighted with an orange box. The page includes tabs for General Info, Eligibility, Add'l Info, Resume Data, Planning, Comp Assess, Programs, Outcomes, Saved Searches, and Services. The Customer Info section contains fields for Customer Data, Citizenship, and Education & Employment.

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**.

The dialog box shows the 'Ethnic Heritage' section with radio buttons for 'Hispanic or Latino', 'Not Hispanic or Latino', and 'Not Disclosed'. Below, a list of checkboxes includes 'Alaskan or American Indian', 'Asian', 'Black or African American', 'Hawaiian or Pacific Islander', 'Guamanian and Chamorro', 'Native Hawaiian', and 'Samoan'. Arrows point to the 'Not Hispanic or Latino' radio button, the 'Hawaiian or Pacific Islander' checkbox, and the 'Guamanian and Chamorro' checkbox.

The dialog box shows the 'Ethnic Heritage' section with radio buttons for 'Hispanic or Latino', 'Not Hispanic or Latino', and 'Not Disclosed'. Below, a list of checkboxes includes 'Alaskan or American Indian', 'Asian', 'Black or African American', 'Hawaiian or Pacific Islander', 'White', and 'Not Disclosed'. Arrows point to the 'Not Disclosed' radio button and the 'Not Disclosed' checkbox.

Education & Employment:

CUSTOMER
PROVIDER
EMPLOYER
STAFF
HELP
ADMIN

Customer Search
Customer Detail
Logout

New Customer SSN: OSOS ID: 7ffd6eba-ef27-4fdb-92a8-b436fe463fdd 1 of 0

General Info
Eligibility
Add'l Info
Resume Data
Planning
Comp Assess
Programs
Outcomes
Saved Searches
Serv...

Customer Info

Customer Data

*SSN: Active *Status: Active *Job Seeker:

*Username: *Password: Merge

*Last Name: *First Name: MI:

*Date of Birth: *Gender: *Portfolio Level: JobZone Adult

*Address 1:

Address 2:

*City: *State: New York

*ZIP Code: County: Country: United States

Metro:

Phone: Ext.: Alt. Phone: Ext.: Fax:

Email: URI: Alt. URI:

Citizenship

U.S. Citizen

Education & Employment

*Education Level: No Grade

*School Status:

*Employment Status:

Underemployed Long Term Unemployed

Contact Preferences

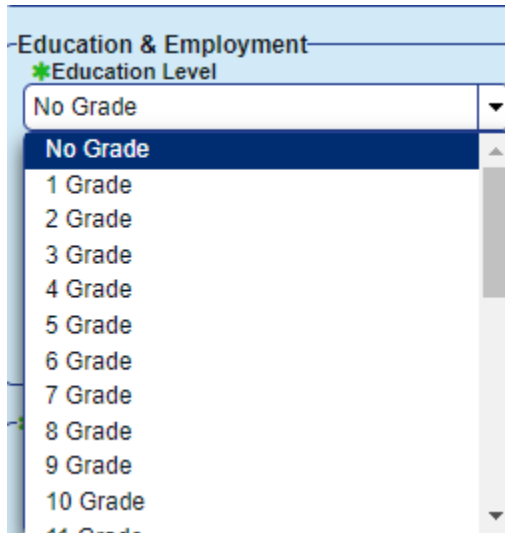
Use Postal Pri. Phone Alt. Phone Fax

Email

Save
Start Match |M|
Activity |A|
I.A. Referrals |R|
Correspond
IVR
Links |L|
Ret To Srch

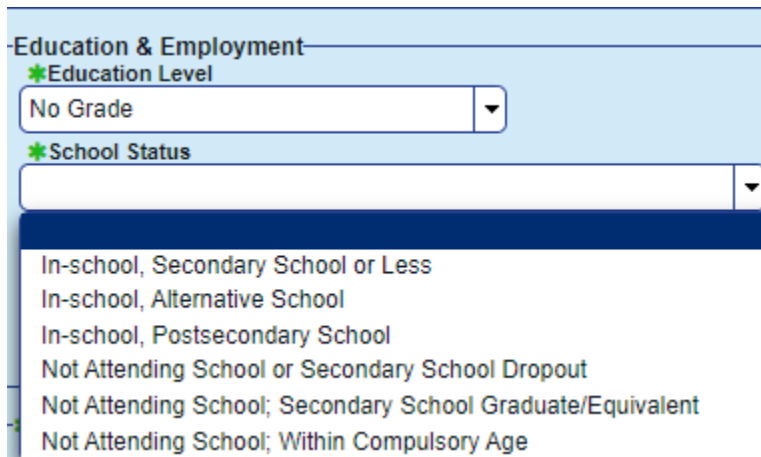
Comments
Tag
Schedule
JobZone
Reload
Custom

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



The screenshot shows a web form section titled "Education & Employment". Underneath, there is a field labeled "*Education Level" with a dropdown menu. The menu is open, showing a list of options: "No Grade", "1 Grade", "2 Grade", "3 Grade", "4 Grade", "5 Grade", "6 Grade", "7 Grade", "8 Grade", "9 Grade", and "10 Grade". The "No Grade" option is currently selected and highlighted in blue.

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



The screenshot shows a web form section titled "Education & Employment". Underneath, there are two fields. The first is labeled "*Education Level" with a dropdown menu showing "No Grade". The second field is labeled "*School Status" with a dropdown menu that is open. The menu lists several options: "In-school, Secondary School or Less", "In-school, Alternative School", "In-school, Postsecondary School", "Not Attending School or Secondary School Dropout", "Not Attending School; Secondary School Graduate/Equivalent", and "Not Attending School; Within Compulsory Age". The first option, "In-school, Secondary School or Less", is highlighted in blue.



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

A screenshot of a web form showing a dropdown menu for "Employment Status". The menu is open, displaying four options: "Employed", "Employed - Rcvd Notice of Termination", "Not In Labor Force", and "Not Employed". The text "Employment Status" is visible at the top of the dropdown, preceded by a green asterisk. The dropdown has a blue header bar and a white body with a blue border.

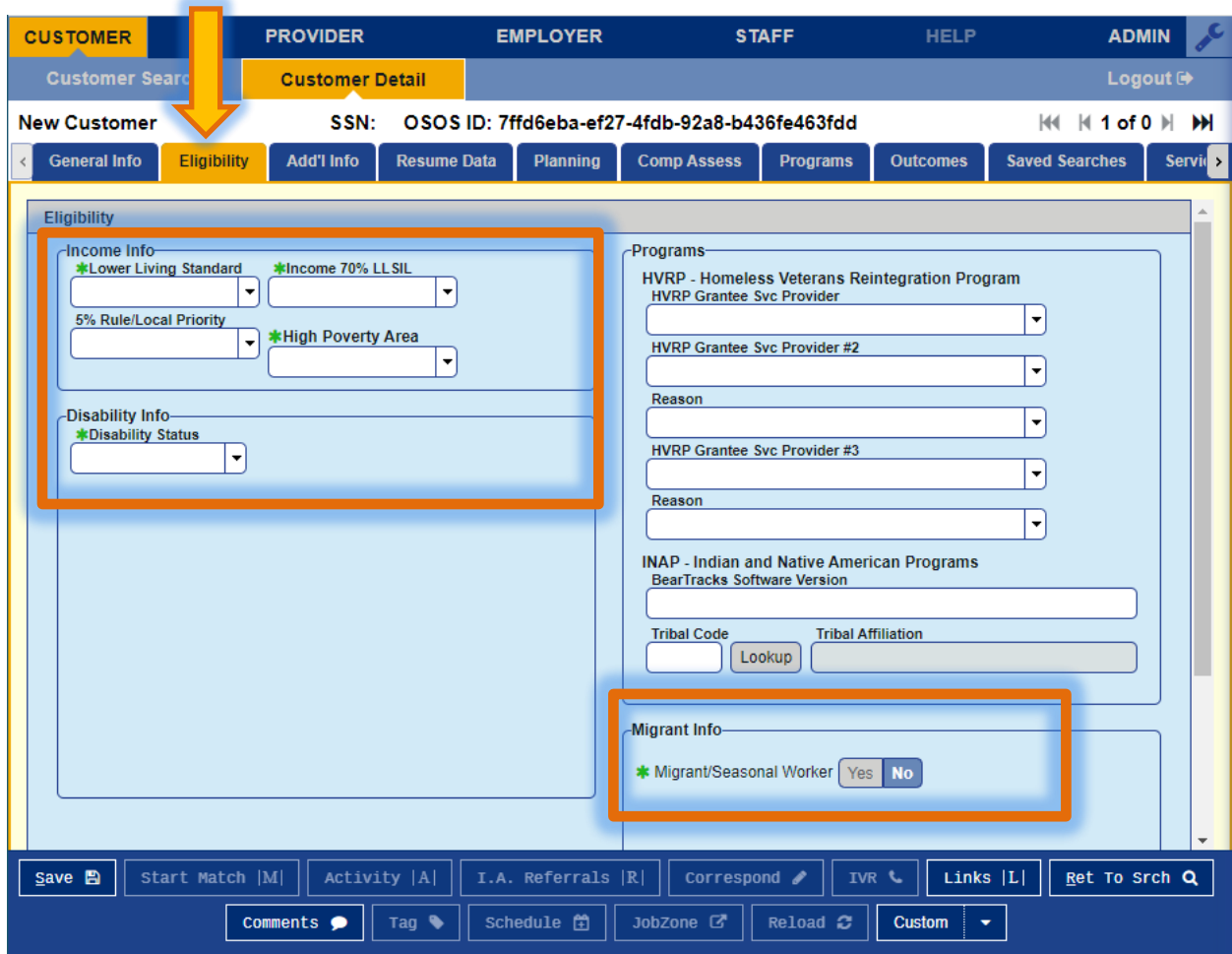
Contact Preferences: At least one preference is needed here and a postal address is required when enter a new customer in OSOS.

A screenshot of a web form for "Contact Preferences". The form has a light blue background and a blue border. At the top, it says "Contact Preferences" with a green asterisk. Below this, there are five checkboxes, each in its own rounded rectangular button: "Use Postal", "Pri. Phone", "Alt. Phone", "Fax", and "Email". All checkboxes are currently unchecked.

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.

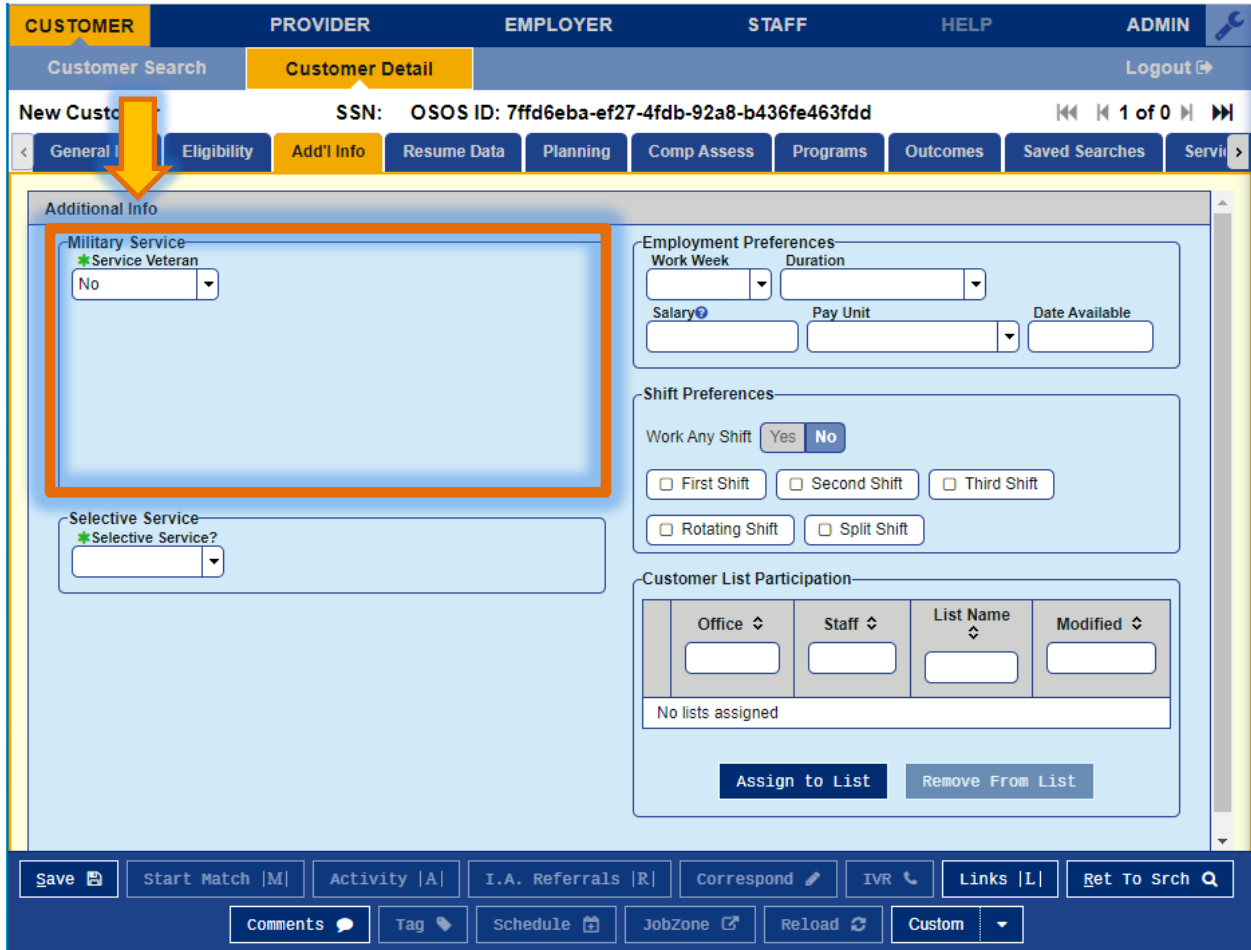


The screenshot displays the OSOS web application interface for the 'Eligibility' tab. The top navigation bar includes 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', 'HELP', and 'ADMIN'. Below this, a sub-navigation bar shows 'Customer Search' and 'Customer Detail'. The main content area is titled 'Eligibility' and contains several sections: 'Income Info' with fields for 'Lower Living Standard', 'Income 70% LLSIL', '5% Rule/Local Priority', and 'High Poverty Area'; 'Disability Info' with a 'Disability Status' field; 'Programs' section with multiple 'HVRP Grantee Svc Provider' fields and 'Reason' dropdowns; and 'Migrant Info' with a 'Migrant/Seasonal Worker' field. A large orange arrow points to the 'Eligibility' tab in the sub-navigation bar. Two orange boxes highlight the 'Income Info' and 'Migrant Info' sections.

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.



The screenshot shows the 'Customer Detail' page with the 'Add'l Info' tab selected. The 'Service Veteran' dropdown is highlighted with an orange box and an arrow pointing to it from the left. The page includes various sections for inputting customer information.

Additional Info

Military Service
 *Service Veteran
 No

Selective Service
 *Selective Service?
 [Dropdown]

Employment Preferences
 Work Week: [Dropdown] Duration: [Dropdown]
 Salary: [Text] Pay Unit: [Dropdown] Date Available: [Text]

Shift Preferences
 Work Any Shift: Yes No
 First Shift Second Shift Third Shift
 Rotating Shift Split Shift

Customer List Participation

Office	Staff	List Name	Modified
[Text]	[Text]	[Text]	[Text]

No lists assigned

Assign to List Remove From List

Buttons at the bottom: Save, Start Match |M|, Activity |A|, I.A. Referrals |R|, Correspond, IVR, Links |L|, Ret To Srch, Comments, Tag, Schedule, JobZone, Reload, Custom

Military Service

*Service Veteran
Yes

*Veteran Status
Active Service | Transitioning Veteran | **Other Eligible**

Other Barriers to Employment | *Military Branch

Veteran Era
Other Eligible

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.

Military Service

*Service Veteran
Yes

*Veteran Status
Active Service | Transitioning Veteran | Other Eligible

*From: 01/13/2004 | *Thru: 01/13/2008 | Days Served: 1462

*Service Disability: Not Disabled

*Current Housing: Rent | Current Housing (2):

Campaign Veteran

Other Barriers to Employment | *Military Branch: Army

Veteran Era
Other Vet

Military Service

*Service Veteran
Yes

*Veteran Status
Active Service | **Transitioning Veteran** | Other Eligible

*Transition Type: Discharge

*From: 05/01/2010 | *Thru: 05/01/2018 | *Service Disability: Not Disabled

Campaign Veteran

Other Barriers to Employment | *Military Branch: Army

Customer Recently Separated
Veteran Era
Transitioning Service Member

Military Service

*Service Veteran
Yes

*Veteran Status
Active Service | Transitioning Veteran | **Other Eligible**

Other Barriers to Employment | *Military Branch: Army

Veteran Era
Other Eligible



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.

A screenshot of a web form titled "Selective Service". It contains a dropdown menu labeled "* Selective Service?" with "Yes" selected. To the right is a text input field labeled "Selective Service Number" and a button labeled "Register/Lookup".

Selective Service	
* Selective Service?	Selective Service Number
Yes	<input type="text"/>
<input type="button" value="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**.

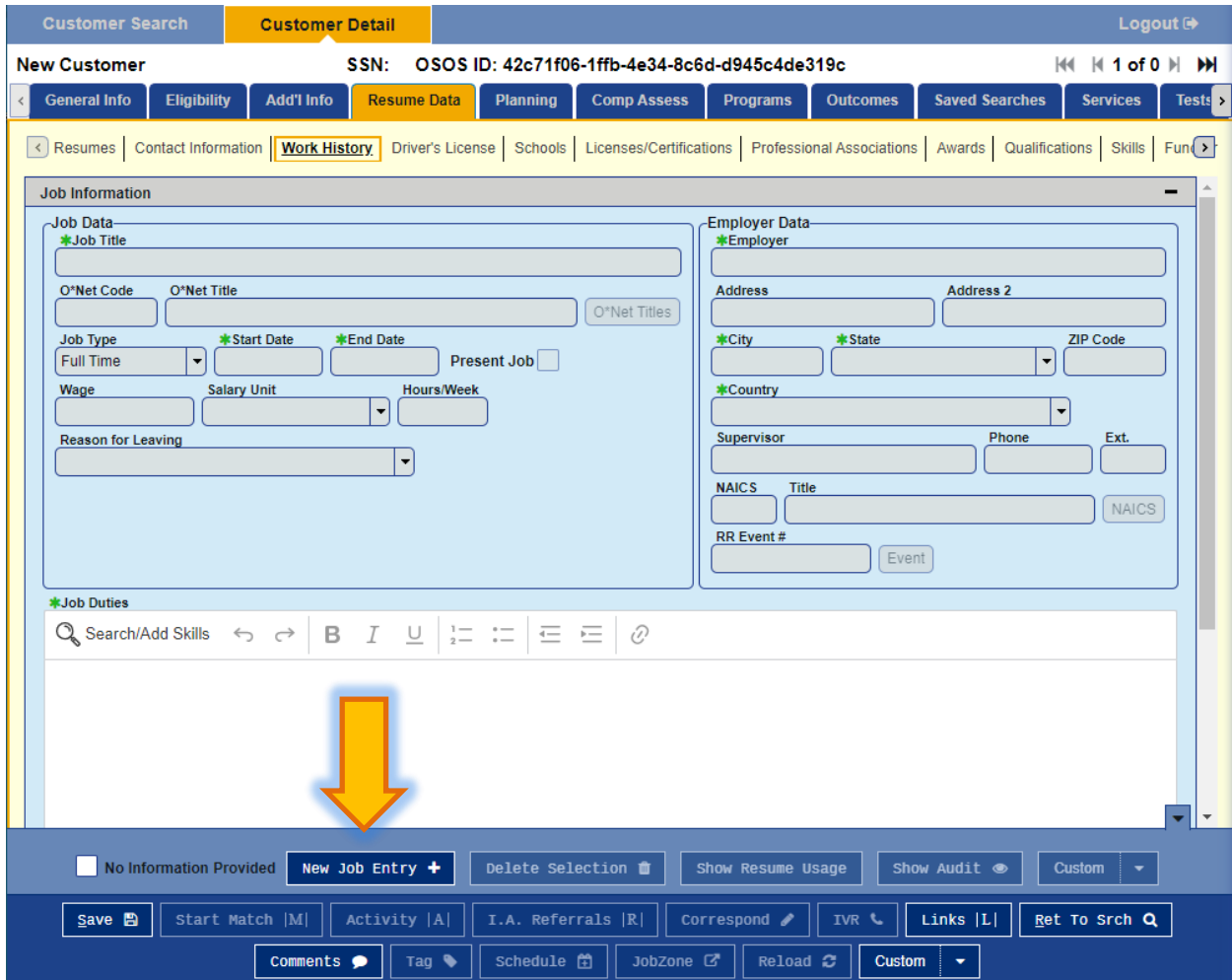
A screenshot of a web form titled "Selective Service". It contains a dropdown menu labeled "* Selective Service?" with "Not Required" selected.

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.**



The screenshot shows the OSOS Customer Detail page for a new customer. The 'Resume Data' tab is selected, and the 'Work History' sub-tab is active. The 'Job Information' form is displayed, containing two main sections: 'Job Data' and 'Employer Data'. The 'Job Data' section includes fields for Job Title, O*Net Code, O*Net Title, Job Type, Start Date, End Date, Wage, Salary Unit, Hours/Week, and Reason for Leaving. The 'Employer Data' section includes fields for Employer, Address, Address 2, City, State, ZIP Code, Country, Supervisor, Phone, Ext., NAICS, Title, and RR Event #. Below the form is a 'Job Duties' section with a search/add skills button and a rich text editor. At the bottom of the form, there is a 'No Information Provided' checkbox and a 'New Job Entry +' button, which is highlighted with a large yellow arrow.

If the customer has a Work History, enter each position separately. Start each entry by clicking the **New Job Entry** button.



This close-up screenshot shows the 'New Job Entry +' button in the OSOS interface, which is highlighted with a yellow arrow. The button is located in the bottom right corner of the 'Job Information' form.

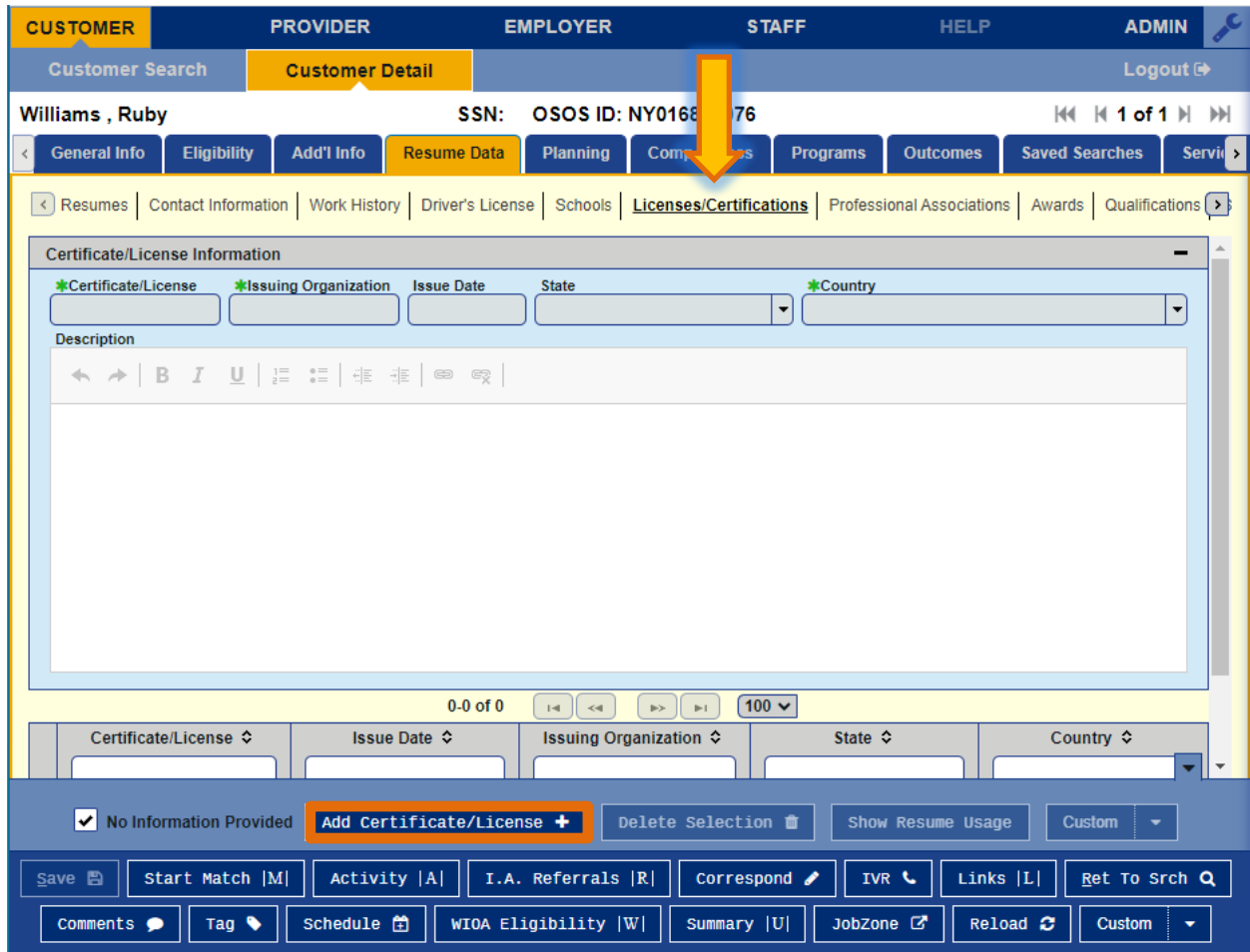
If a customer has no Work History or did not provide information, select **No Information Provided**.



This close-up screenshot shows the 'No Information Provided' checkbox in the OSOS interface, which is highlighted with a yellow arrow. The checkbox is located in the bottom left corner of the 'Job Information' form.

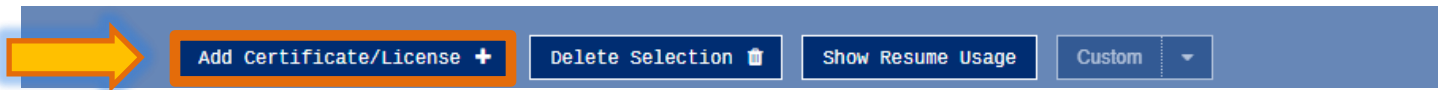
RESUME DATA TAB - LICENSES/CERTIFICATIONS

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**.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP, and ADMIN. Below these are sub-tabs: Customer Search and Customer Detail. The main content area shows the profile for Ruby Williams, with fields for SSN and OSOS ID. A navigation bar includes tabs like General Info, Eligibility, Add'l Info, Resume Data, Planning, and Licenses/Certifications. The Licenses/Certifications tab is active, displaying a form for adding new entries. The form includes fields for Certificate/License, Issuing Organization, Issue Date, State, and Country, along with a description field. At the bottom of the form, there is a table with columns for Certificate/License, Issue Date, Issuing Organization, State, and Country. Below the table, there are buttons for 'Add Certificate/License +', 'Delete Selection', 'Show Resume Usage', and 'Custom'. The 'Add Certificate/License +' button is highlighted with an orange box and an arrow.

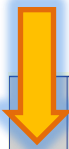
Start each entry by clicking on the **Add Certificate/License +**.



This image is a close-up of the 'Add Certificate/License +' button from the previous screenshot. The button is highlighted with an orange box, and an orange arrow points to it from the left.



To view each entry, click on the check mark box.

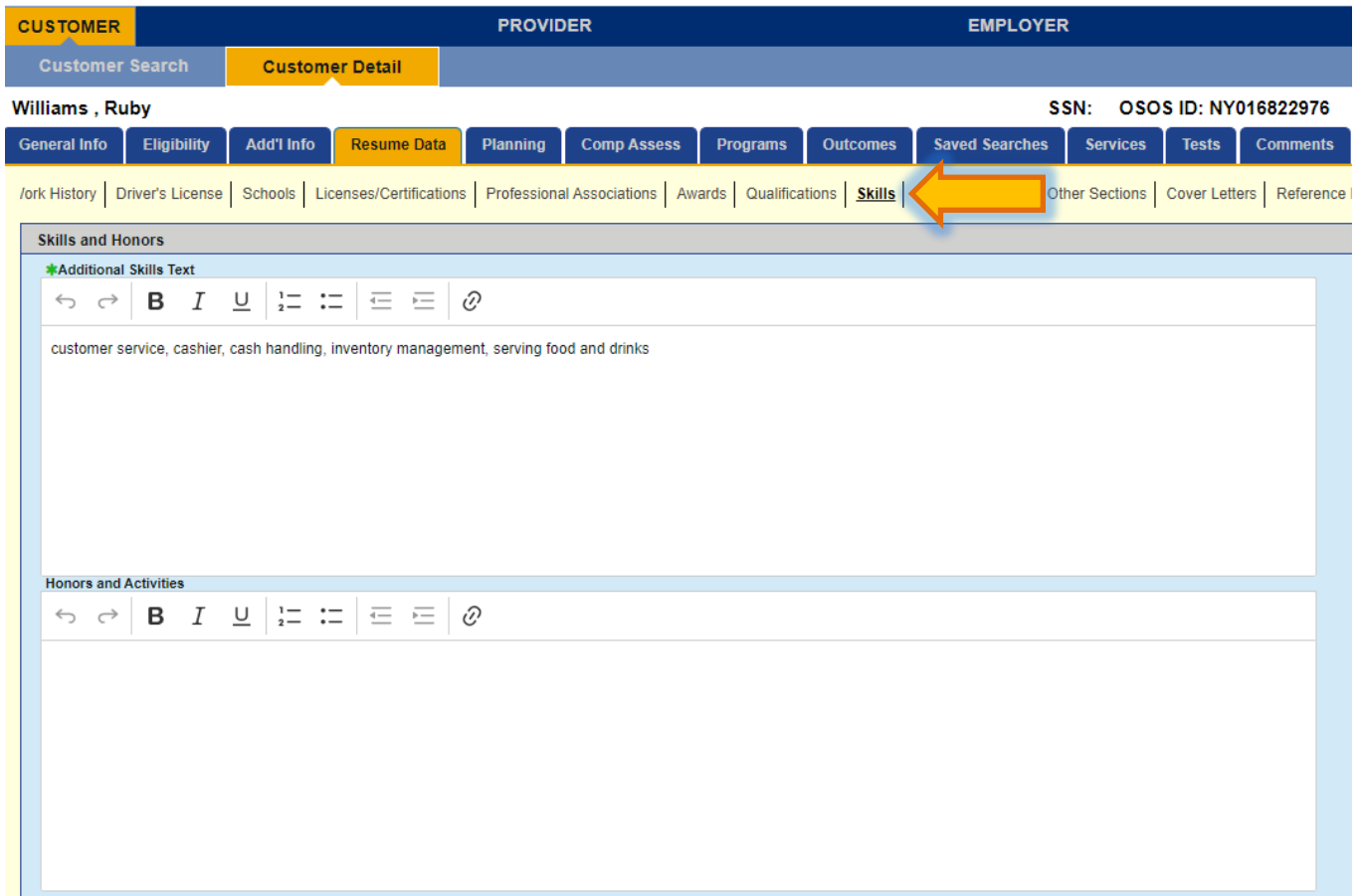


	Certificate/License ▾	Issue Date ▾	Issuing Organization ▾	State ▾	Country ▾
<input checked="" type="checkbox"/>				NY	US
<input type="checkbox"/>				NY	US

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 screenshot shows the OSOS Customer Detail page for Ruby Williams. The page is divided into three main sections: CUSTOMER, PROVIDER, and EMPLOYER. The CUSTOMER section is active, showing tabs for Customer Search and Customer Detail. The Customer Detail section includes tabs for General Info, Eligibility, Add'l Info, Resume Data, Planning, Comp Assess, Programs, Outcomes, Saved Searches, Services, Tests, and Comments. The Resume Data tab is selected, and the Skills link is highlighted with a yellow arrow. The Skills and Honors section contains two text input fields: Additional Skills Text (with the text "customer service, cashier, cash handling, inventory management, serving food and drinks") and Honors and Activities.

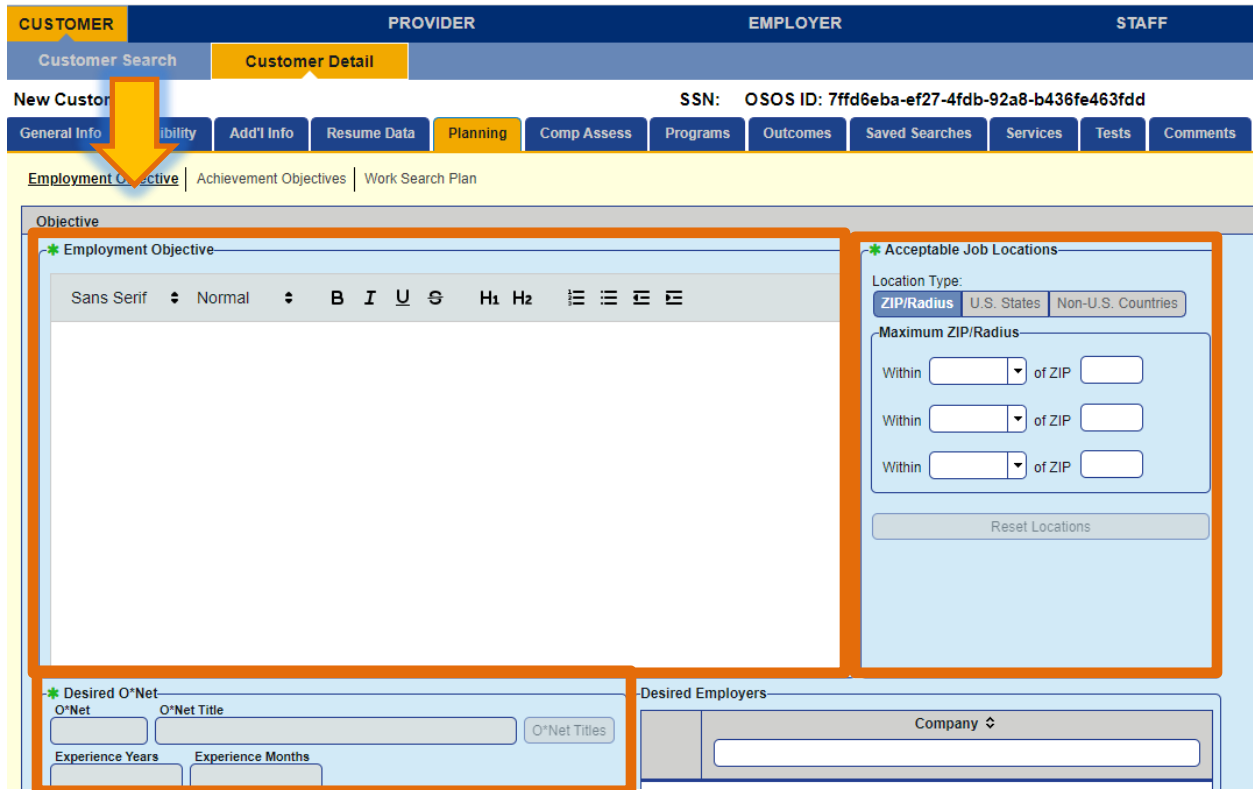


The remaining tabs are not required to create a Basic OSOS Customer Record.

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

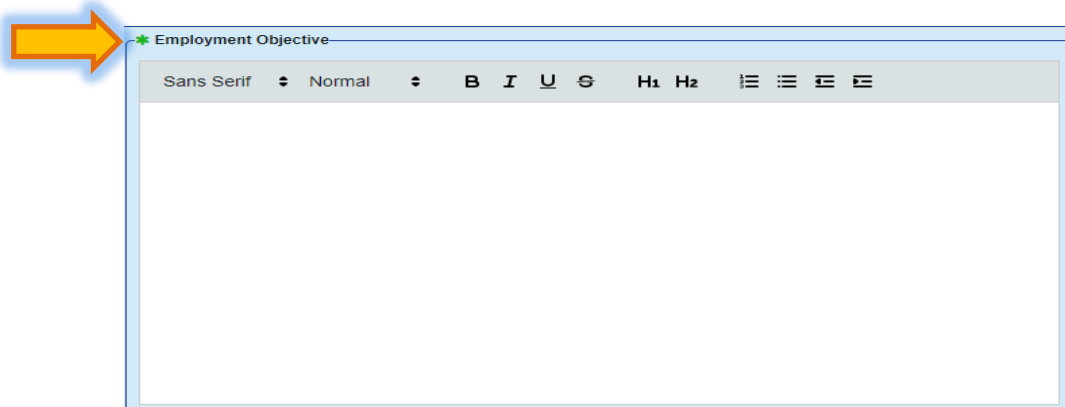
In the **Planning tab**, the **Employment Objective** link needs to be completed: Within the **Employment Objective**, the required fields need to be filled out: **Employment Objective**, **Desired O*Net**, and **Acceptable Job Locations**.



The screenshot shows the OSOS interface with the following elements:

- Navigation Bar:** CUSTOMER (highlighted), PROVIDER, EMPLOYER, STAFF.
- Customer Search:** Customer Search, Customer Detail.
- Customer Information:** New Customer, SSN: OSOS ID: 7ffd6eba-ef27-4fdb-92a8-b436fe463fdd.
- Planning Tab:** General Info, Eligibility, Add'l Info, Resume Data, **Planning** (highlighted), Comp Assess, Programs, Outcomes, Saved Searches, Services, Tests, Comments.
- Employment Objective Section:**
 - Employment Objective:** A large text area with a rich text editor toolbar (Sans Serif, Normal, Bold, Italic, Underline, Link, H1, H2, Bulleted List, Numbered List, Indent, Outdent).
 - Acceptable Job Locations:**
 - Location Type: ZIP/Radius (selected), U.S. States, Non-U.S. Countries.
 - Maximum ZIP/Radius: Three rows, each with a dropdown menu for 'Within' and input fields for 'of ZIP'.
 - Reset Locations button.
- Desired O*Net Section:**
 - O*Net: Input field.
 - O*Net Title: Input field.
 - O*Net Titles: Button.
 - Experience Years: Input field.
 - Experience Months: Input field.
- Desired Employers Section:**
 - Company: Dropdown menu.

Employment Objective: This field is used to summarize the customer's employment objectives. This field is a maximum of 4000 characters.

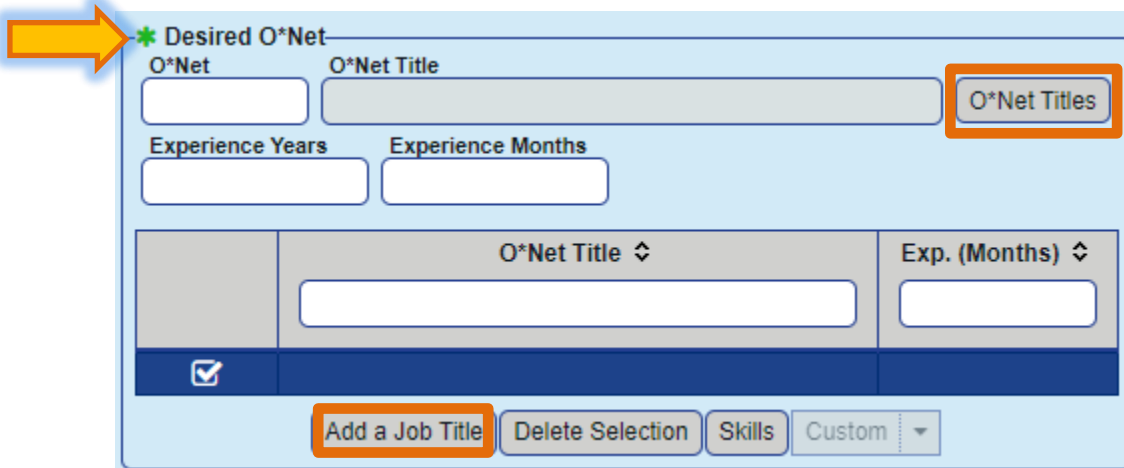


This close-up view shows the **Employment Objective** text area with the following details:

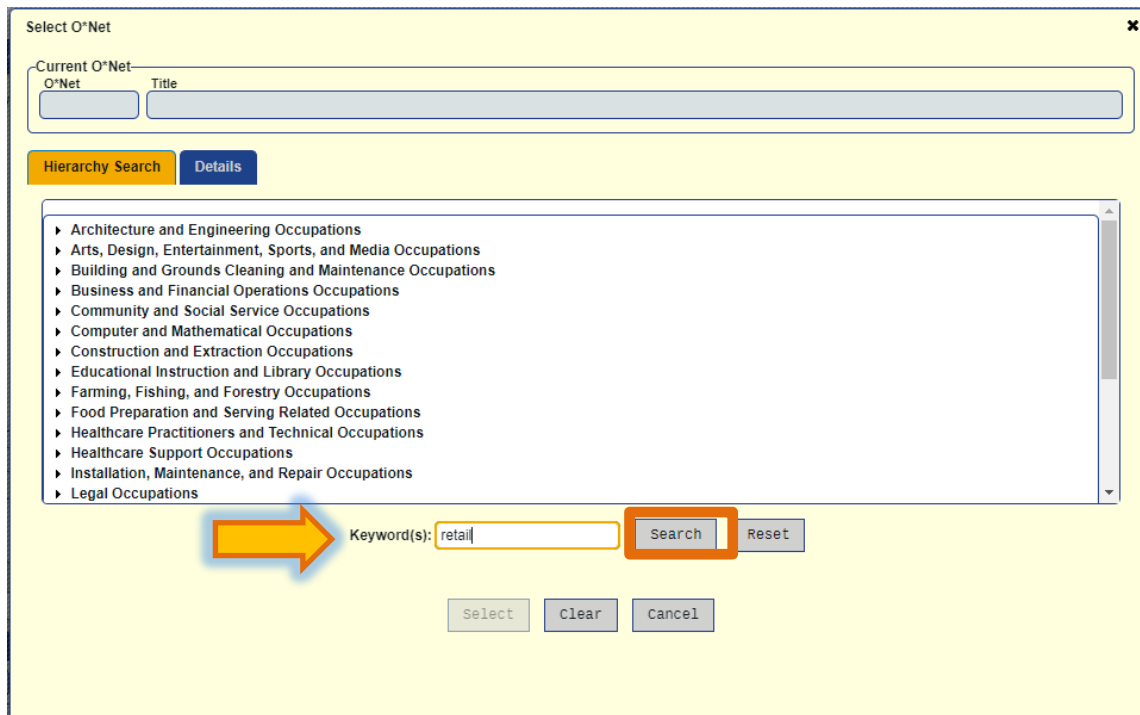
- Section Header:** * Employment Objective
- Toolbar:** Sans Serif, Normal, Bold, Italic, Underline, Link, H1, H2, Bulleted List, Numbered List, Indent, Outdent.
- Text Area:** A large, empty white box for entering the employment objective.

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.



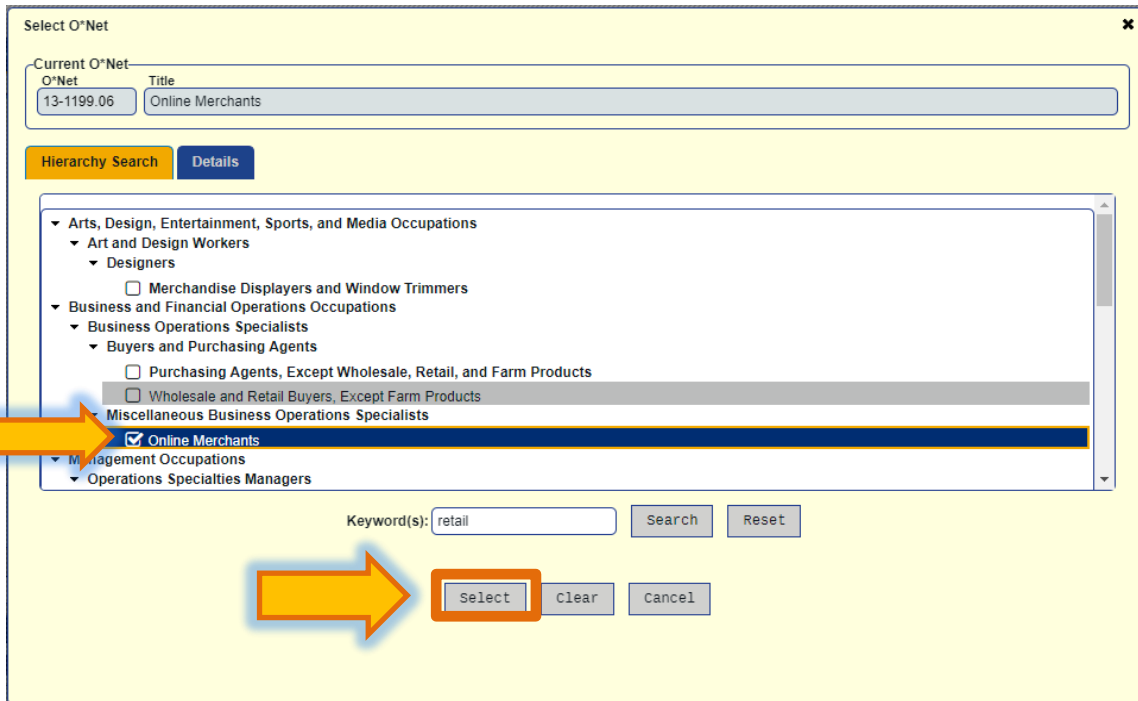
The screenshot shows a form titled "Desired O*Net" with a blue header. It contains several input fields: "O*Net", "O*Net Title", "Experience Years", and "Experience Months". A button labeled "O*Net Titles" is highlighted with an orange box. Below these fields is a table with columns for "O*Net Title" and "Exp. (Months)". At the bottom, there are buttons for "Add a Job Title", "Delete Selection", "Skills", and a "Custom" dropdown menu. An orange arrow points to the "O*Net Titles" button.



The screenshot shows a dialog box titled "Select O*Net" with a yellow background. It has a "Current O*Net" section with "O*Net" and "Title" fields. Below are "Hierarchy Search" and "Details" buttons. A list of occupation categories is shown, including "Architecture and Engineering Occupations", "Arts, Design, Entertainment, Sports, and Media Occupations", "Building and Grounds Cleaning and Maintenance Occupations", "Business and Financial Operations Occupations", "Community and Social Service Occupations", "Computer and Mathematical Occupations", "Construction and Extraction Occupations", "Educational Instruction and Library Occupations", "Farming, Fishing, and Forestry Occupations", "Food Preparation and Serving Related Occupations", "Healthcare Practitioners and Technical Occupations", "Healthcare Support Occupations", "Installation, Maintenance, and Repair Occupations", and "Legal Occupations". At the bottom, there is a "Keyword(s):" field with "retail" entered, a "Search" button highlighted with an orange box, and a "Reset" button. Below these are "Select", "Clear", and "Cancel" buttons. An orange arrow points to the "Search" button.

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**.



Select O*Net

Current O*Net
 O*Net: 13-1199.06 Title: Online Merchants

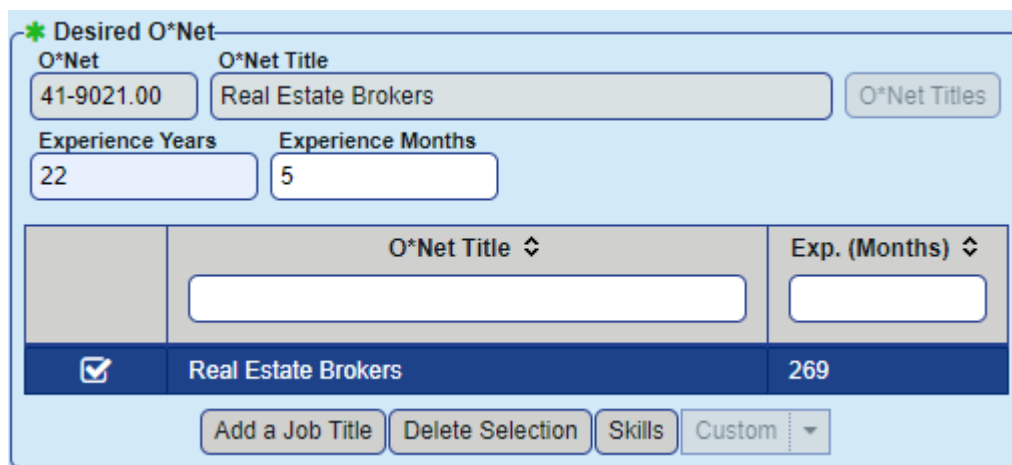
Hierarchy Search Details

- ▼ Arts, Design, Entertainment, Sports, and Media Occupations
 - ▼ Art and Design Workers
 - ▼ Designers
 - Merchandise Displayers and Window Trimmers
 - ▼ Business and Financial Operations Occupations
 - ▼ Business Operations Specialists
 - ▼ Buyers and Purchasing Agents
 - Purchasing Agents, Except Wholesale, Retail, and Farm Products
 - Wholesale and Retail Buyers, Except Farm Products
 - Online Merchants
 - ▼ Management Occupations
 - ▼ Operations Specialties Managers

Keyword(s): retail Search Reset

Select Clear Cancel

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



* Desired O*Net

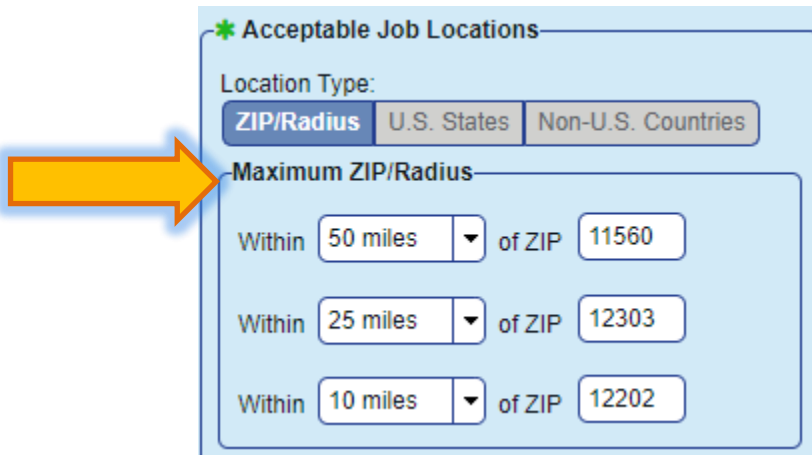
O*Net: 41-9021.00 O*Net Title: Real Estate Brokers O*Net Titles

Experience Years: 22 Experience Months: 5

	O*Net Title ⇅	Exp. (Months) ⇅
<input checked="" type="checkbox"/>	Real Estate Brokers	269

Add a Job Title Delete Selection Skills Custom

Acceptable Job Locations: Indicate Maximum Zip Radius.



* Acceptable Job Locations

Location Type:

ZIP/Radius U.S. States Non-U.S. Countries

Maximum ZIP/Radius

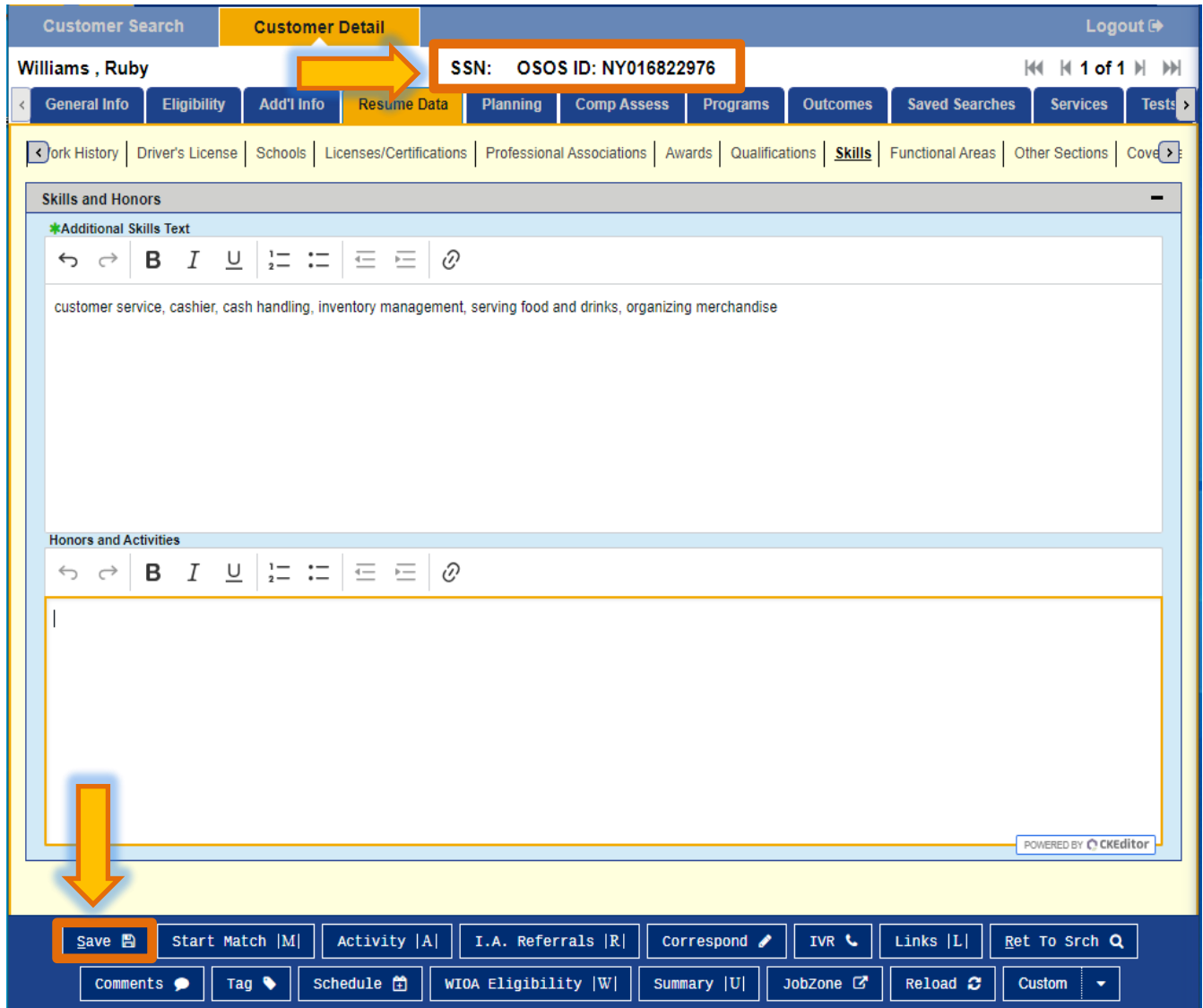
Within 50 miles of ZIP 11560

Within 25 miles of ZIP 12303

Within 10 miles of ZIP 12202

SAVING THE RECORD

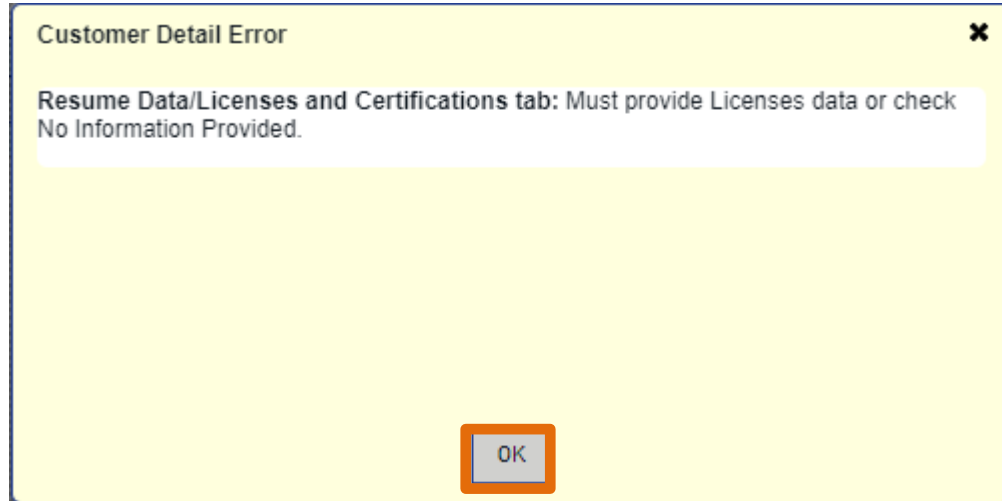
When data entry is complete, click **Save** at the bottom left corner of any tab. A unique OSOS ID number is now assigned to the customer.



The screenshot displays the OSOS Customer Detail page for Ruby Williams. The 'Resume Data' tab is active, showing a text editor for 'Additional Skills Text' containing the text: 'customer service, cashier, cash handling, inventory management, serving food and drinks, organizing merchandise'. Below this is an empty 'Honors and Activities' section. The 'Save' button is highlighted with a red box and a red arrow pointing to it. The bottom navigation bar includes buttons for 'Save', 'Start Match |M|', 'Activity |A|', 'I.A. Referrals |R|', 'Correspond', 'IVR', 'Links |L|', 'Get To Srch Q', 'Comments', 'Tag', 'Schedule', 'WIOA Eligibility |W|', 'Summary |U|', 'JobZone', 'Reload', and 'Custom'.



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



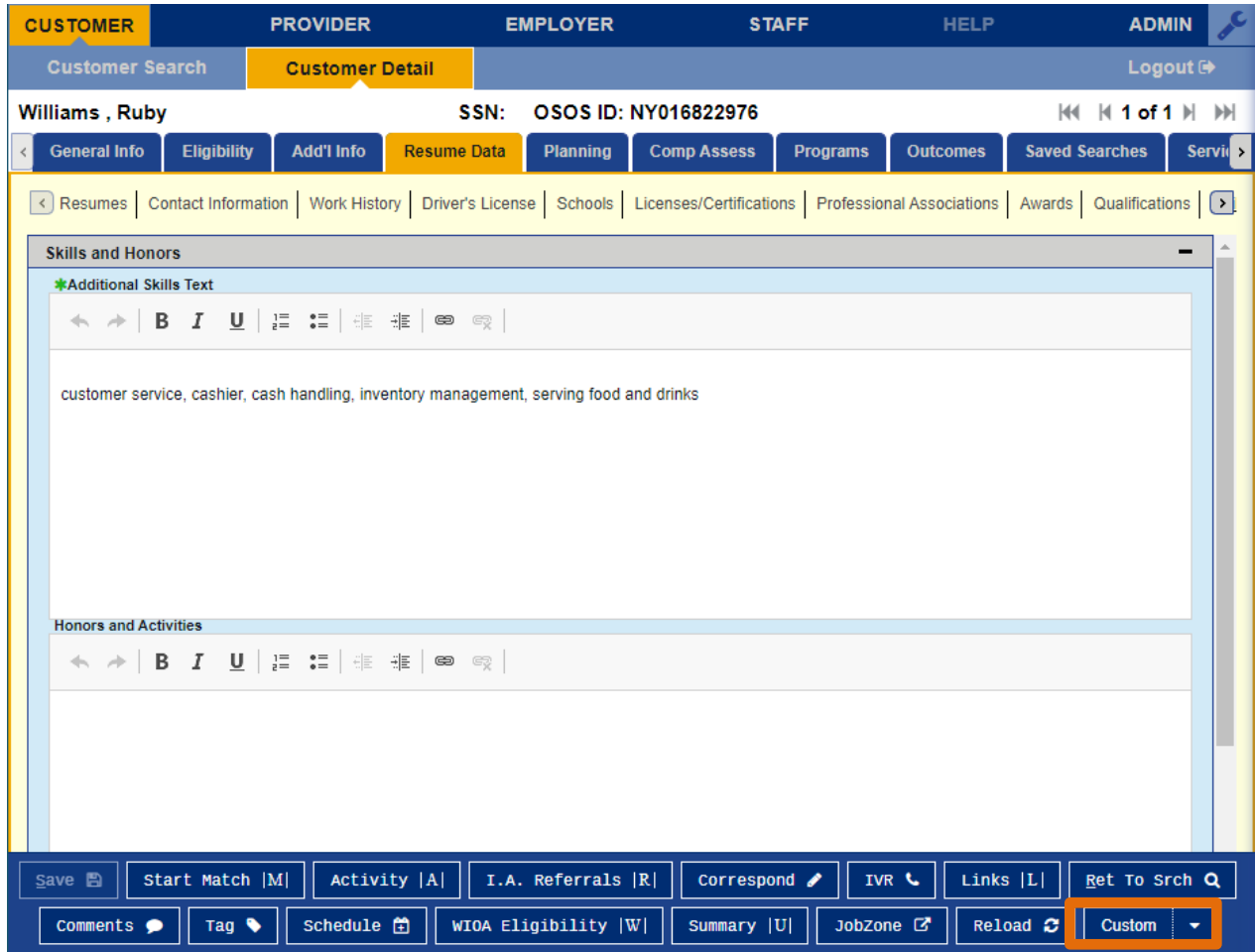


Navigate to the appropriate tab and complete the required data field(s). Click **Save**. The Customer Record will display the new OSOS ID when the Customer Record is successfully created.

The screenshot shows the OSOS Customer Detail page for Ruby Williams (SSN: NY016822976). The 'Resume Data' tab is selected. The 'Skills and Honors' section is expanded, showing a text editor for 'Additional Skills Text' with the content: 'customer service, cashier, cash handling, inventory management, serving food and drinks, organizing merchandise'. A yellow arrow points to the 'Save' button in the bottom navigation bar.

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.



CUSTOMER PROVIDER EMPLOYER STAFF HELP ADMIN

Customer Search Customer Detail Logout

Williams , Ruby SSN: OSOS ID: NY016822976 1 of 1

General Info Eligibility Add'l Info Resume Data Planning Comp Assess Programs Outcomes Saved Searches Services

Resumes Contact Information Work History Driver's License Schools Licenses/Certifications Professional Associations Awards Qualifications

Skills and Honors

*Additional Skills Text

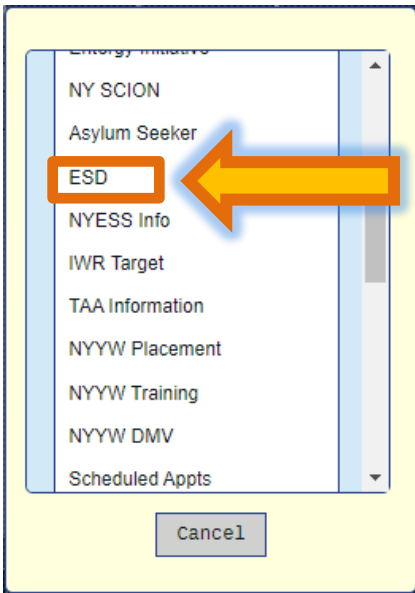
customer service, cashier, cash handling, inventory management, serving food and drinks

Honors and Activities

Save Start Match |M| Activity |A| I.A. Referrals |R| Correspond IVR Links |L| Ret To Srch Q

Comments Tag Schedule WIOA Eligibility |W| Summary |U| JobZone Reload Custom

Click the Custom button and choose the ESD option.

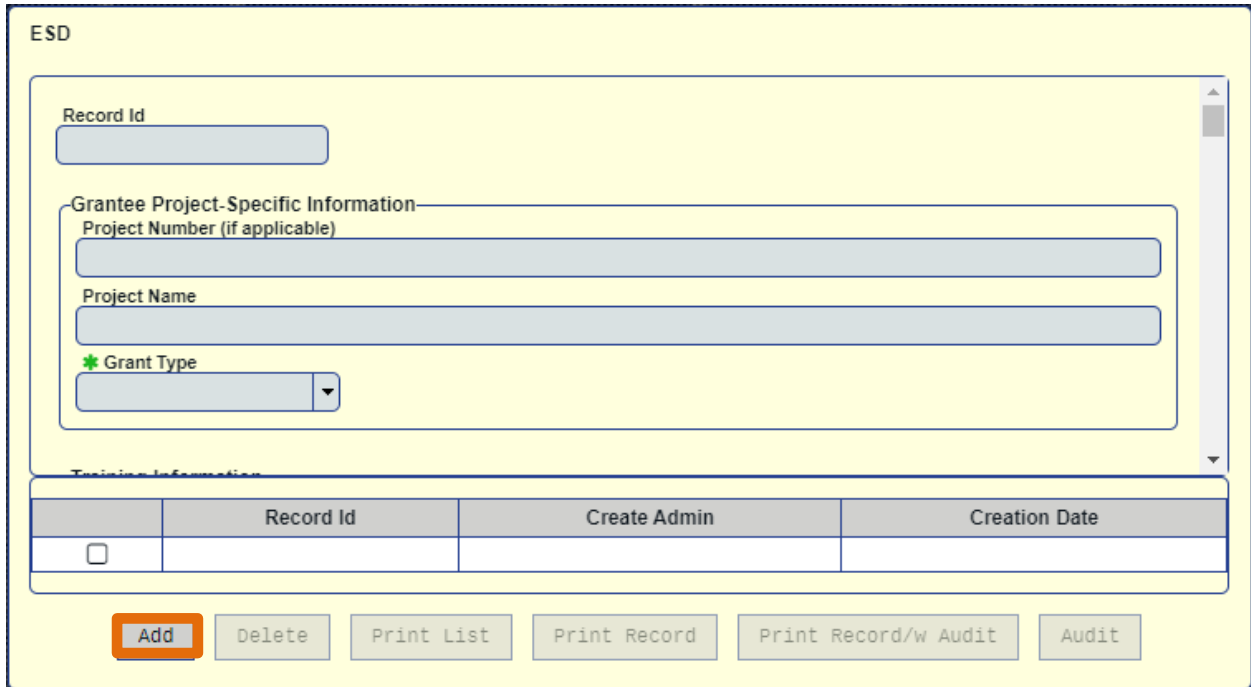


Energy Initiative

- NY SCION
- Asylum Seeker
- ESD**
- NYESS Info
- IWR Target
- TAA Information
- NYYW Placement
- NYYW Training
- NYYW DMV
- Scheduled Appts

Cancel

To begin entering grant specific information, click the **Add** button in the lower left side of the screen.



ESD

Record Id

Grantee Project-Specific Information

Project Number (if applicable)

Project Name

* Grant Type

	Record Id	Create Admin	Creation Date
<input type="checkbox"/>			

Add Delete Print List Print Record Print Record/w Audit Audit

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.

ESD

Record Id
b31b571f-c80b-4a7c-9224-70c5e95cc7ff

Grantee Project-Specific Information

Project Number (if applicable)

Project Name

* Grant Type
ESD OSWD WF Capital Grant

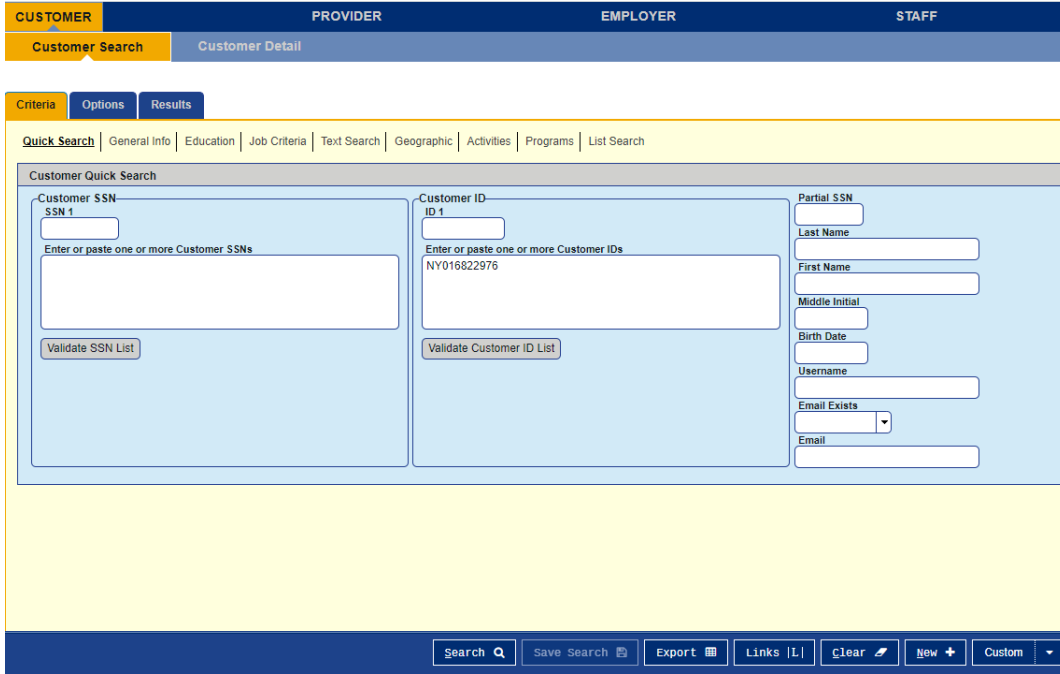
Training Information

* Primary Training Industry
Healthcare

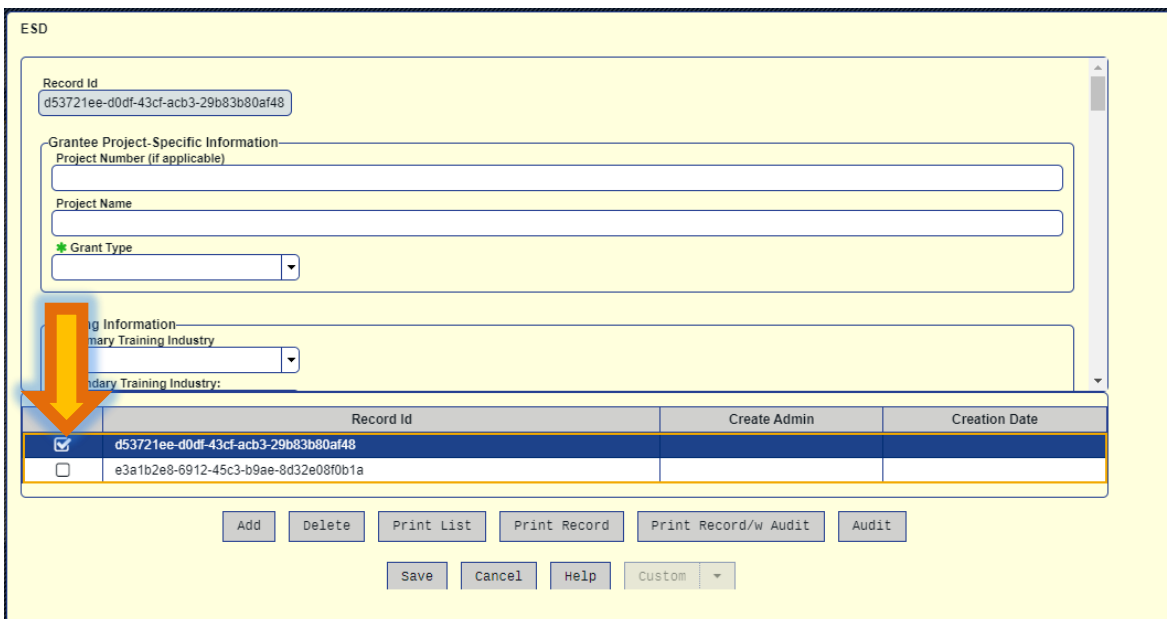
	Record Id	Create Admin	Creation Date
<input checked="" type="checkbox"/>	b31b571f-c80b-4a7c-9224-70c5e95cc7ff		
<input type="checkbox"/>	64508c26-931b-4f14-8524-d46ff2b24314		

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.



	Record Id	Create Admin	Creation Date
<input checked="" type="checkbox"/>	d53721ee-d0df-43cf-acb3-29b83b80af48		
<input type="checkbox"/>	e3a1b2e8-6912-45c3-b9ae-8d32e08f0b1a		

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.

ESD

Record Id
f1176328-3f6e-40bd-a382-839f133fb050

Grantee Project-Specific Information

Project Number (if applicable)
0809087

Project Name
Management Training

* Grant Type
CUNY Internships

Training Information

* Primary Training Industry
Industrial/Manufacturing

Secondary Training Industry:
Research & Development

O*Net *Onet Title
15-1243 Data Warehousing Specialists ONET

	Record Id	Create Admin	Creation Date
<input checked="" type="checkbox"/>	f1176328-3f6e-40bd-a382-839f133fb050		

Add Delete Print List Print Record Print Record/w Audit Audit

Save Cancel Help Custom

CUSTOMER	PROVIDER	EMPLOYER	STAFF	HELP	ADMIN
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Customer Search | **Customer Detail** | Logout

Williams , Ruby **SSN: OSOS ID: NY016822976** << < 1 of 1 > >>

General Info | Eligibility | Add'l Info | Resume Data | Planning | Comp Assess | Programs | Outcomes | Saved Searches | Services

Customer Info

<p>Customer Data</p> <p>*SSN: [] *Status: Active [v] *Job Seeker: Inactive [v]</p> <p>*Username: Artistgirl *Password: Artistgirl123 Merge</p> <p>*Last Name: Williams *First Name: Ruby MI: []</p> <p>*Date of Birth: 12/23/2006 *Gender: Female [v] *Portfolio Level: JobZone Adult [v]</p> <p>*Address 1: 303 Canvas Drive</p> <p>Address 2: []</p> <p>*City: Schenectady *State: New York [v]</p> <p>*ZIP Code: 12303 County: Schenectady [v] Country: United States [v]</p> <p>Metro: [v]</p> <p>Phone: 518-344-5768 Ext.: [] Alt. Phone: [] Ext.: [] Fax: []</p> <p>Email: [] URI: [] Alt. URI: []</p>		<p>Citizenship</p> <p>* U.S. Citizen [x]</p>	
<p>Education & Employment</p> <p>*Education Level: 12 Grade - HS Graduate [v]</p> <p>*School Status: Not Attending School; Secondary School Graduate/Equivalent [v]</p> <p>*Employment Status: Not Employed [v]</p> <p>Underemployed [v] Long Term Unemployed [v]</p>		<p>Contact Preferences</p> <p><input type="checkbox"/> Use Postal <input checked="" type="checkbox"/> Pri. Phone <input type="checkbox"/> Alt. Phone <input type="checkbox"/> Fax</p> <p><input type="checkbox"/> Email</p>	

Save	Start Match M	Activity A	I.A. Referrals R	Correspond	IVR	Links L	Ret To Srch
Comments	Tag	Schedule	WIOA Eligibility W	Summary U	JobZone	Reload	Custom



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