Creating a Basic Customer Record OSOS Guide

TABLE OF CONTENTS

PURPOSE

The One-Stop Operating System (OSOS) is the primary case management system used for tracking all services provided to customers throughout the Workforce Development System. OSOS collects substantial information from customers, businesses, and training providers. This information is also used to prepare required State and Federal reports.

This guide outlines the process to create a basic customer record in OSOS and highlights the required fields.

To better serve the customer, staff should always enter as much information as possible when creating the customer record. However, this guide details only the information required to create a basic customer record.
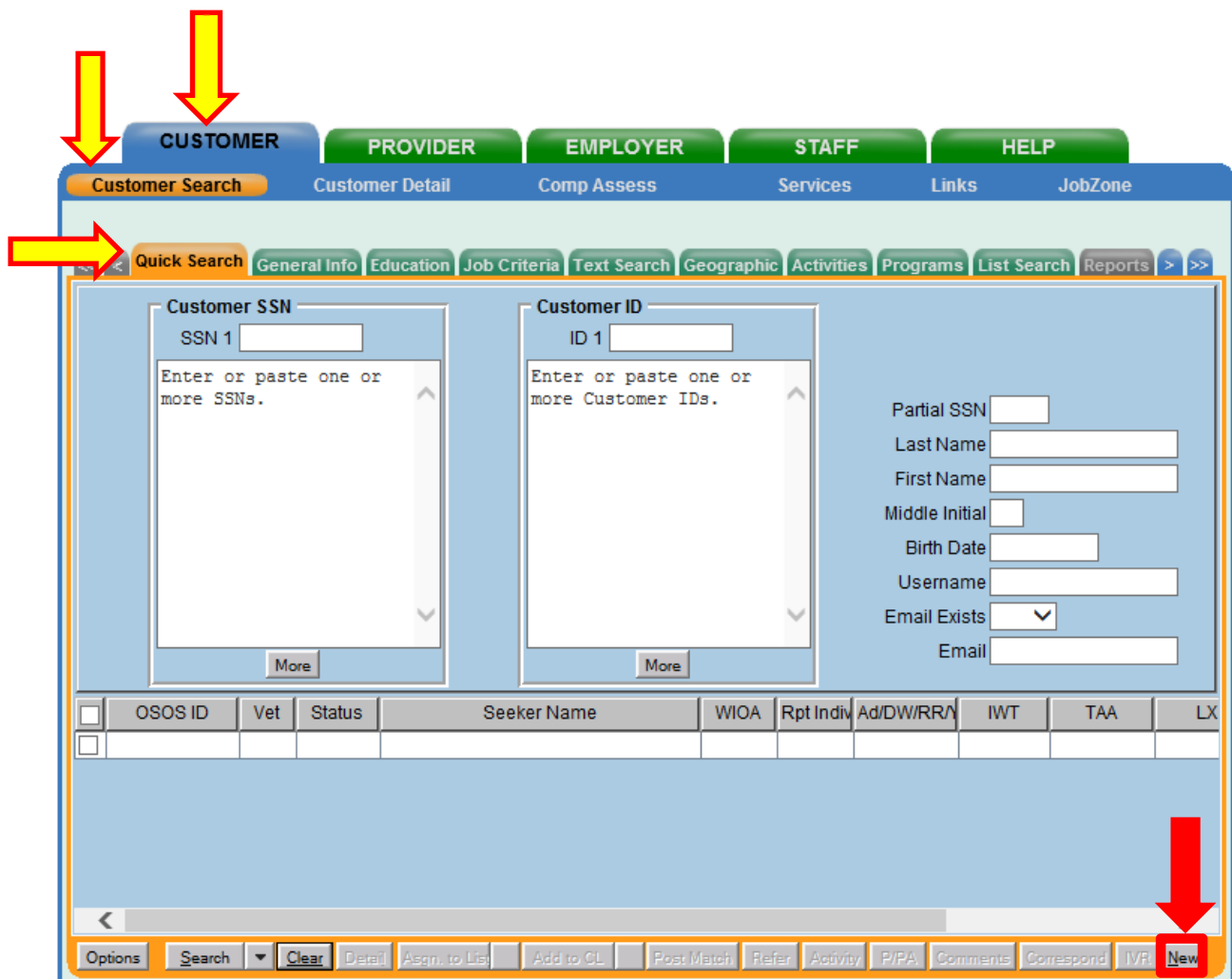
Please note, some customers may already have a customer record in OSOS. If the customer has received Unemployment Insurance, used Self-Service tools such as JobZone, or registered at a local career center, a record will exist for that customer. If a customer record already exists, staff would not create a new record. Instead, they must review the existing customer information and update it as necessary.

OSOS DATA ENTRY

GETTING STARTED

Upon logging into OSOS, it is a best practice to search for the customer by name prior to creating a new record. This will eliminate the risk of creating a duplicate record for a customer that may already exist in OSOS. To identify if a record already exists, enter the customers first and last name, or partial name and click **Search**. You can also include any of the other fields available to help narrow down the search in cases where many results are returned. For example, you can search by first name, last name and Email, to get more restricted search results. Please reference the Performing a Customer Search OSOS Guide for more information on completing a customer search.

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

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

- General Info Tab
- Additional Info Tab
- Work History Tab
- Skills Tab
- Eligibility Tab
- Objective Tab
- Education and Licensing Tab

GENERAL INFORMATION TAB

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

All required fields are indicated throughout OSOS by a green dot ● *in front of the field name.*
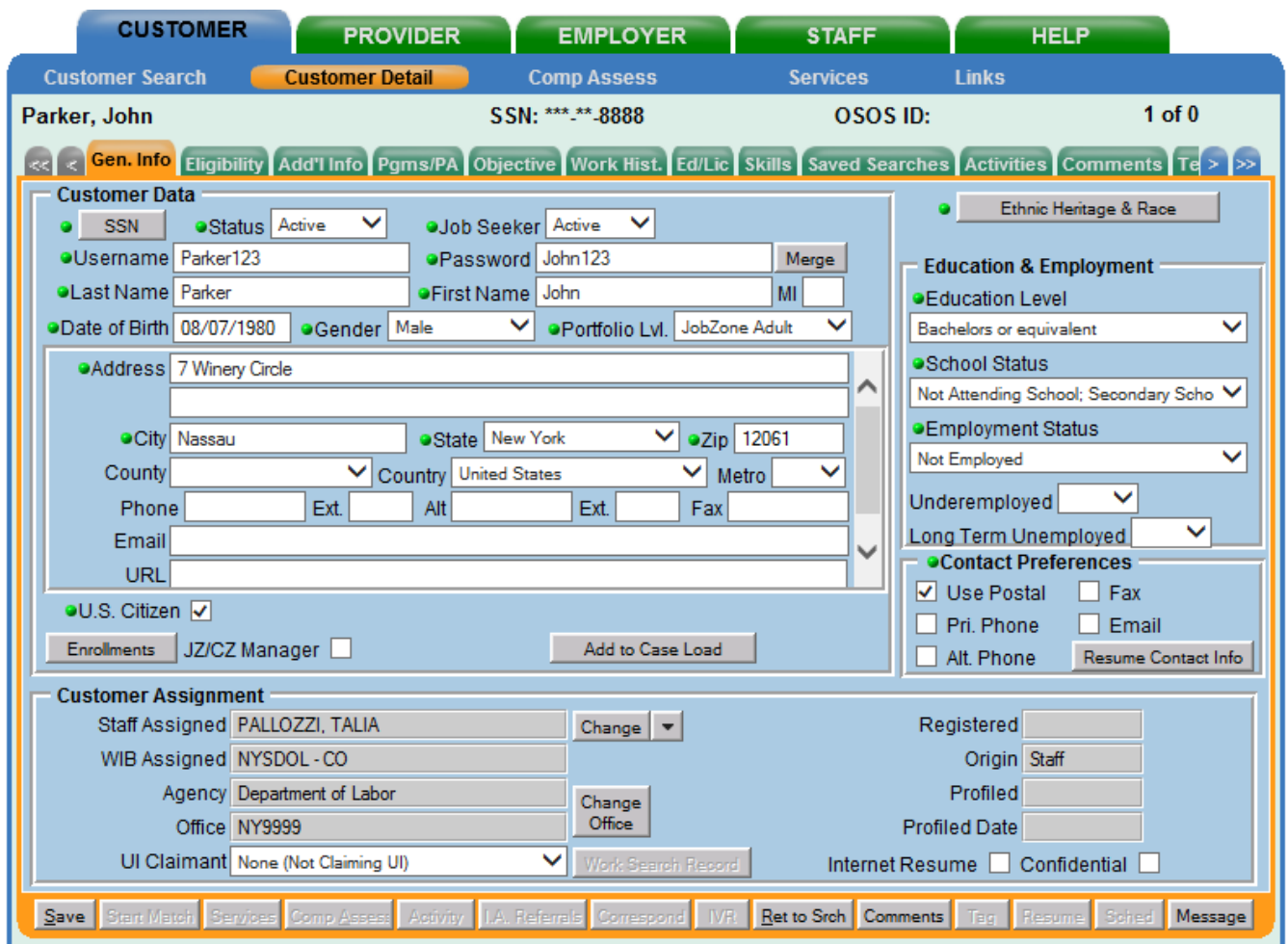
In the **General Info** tab, the required fields are: **SSN**, **Status** (system defaults to Active), **Job Seeker**, **Username**, **Password**, **Last Name**, **First Name**, **Date of Birth**, **Gender**, **Portfolio Lvl** (system default), **Address**, **City**, **State** (system defaults), **Zip**, **U.S. Citizen** (system default), **Ethnic Heritage & Race**, **Education Level**, **School Status**, **Employment Status** and **Contact Preferences**. Record information into each of the required fields.

*Do not click **Save** until all the required information, in all tabs, is recorded for the complete basic customer record. If **Save** is selected before the data is completely entered, it will generate an error message. If this error message does appear, you will still be able to continue with the record by clicking **OK** and continuing to enter the*

*information. Instead, when creating the customer record, simply select the next appropriate tab. Click **Save** when all the required information has been entered.*

SSN: The customer's Social Security Number is not required, but the field is required to be completed. If the customer provides their SSN, enter it in the **SSN** and **Confirm SSN** fields. Click **OK**. If the SSN is not available, or the customer does not wish to provide it, check **Not Disclosed** and click **OK**.
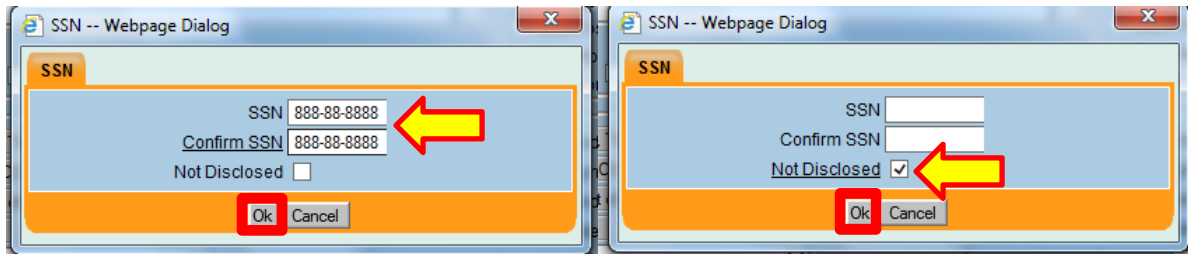
Job Seeker: Select Active from the drop-down menu. This is important because when staff match to an open job order, only customers with an Active status can be returned in search results.

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

Last Name, First Name, Date of Birth and Gender: Enter customer's information accordingly. Please reference the OSOS Guide for Verifying Date of Birth in the DOB Tab for information on Data Element Validation and date of birth.

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.

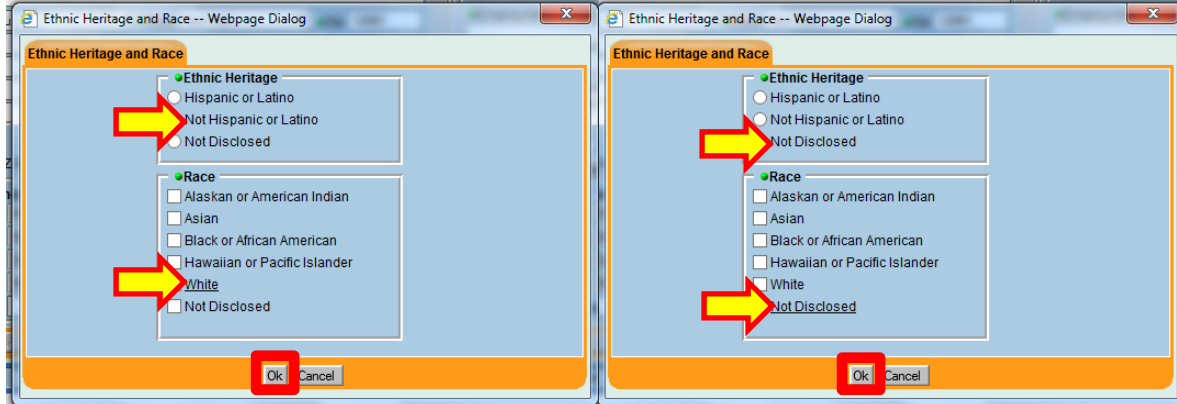- **Alien Reg #** (Alien Registration Number) and **Expires** (Expiration Date)

We do not collect this information in OSOS. 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."

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

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

Education & Employment:

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

To complete the Employability Profile, customers with an **Education Level** of *Associate's Degree or higher must have the appropriate corresponding information entered in the **Ed/Lic** tab.*

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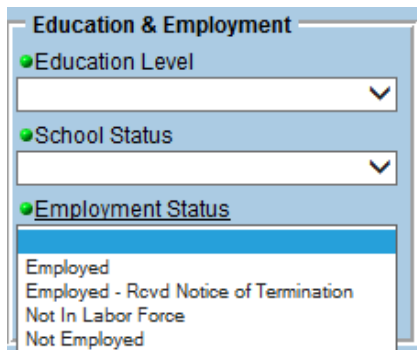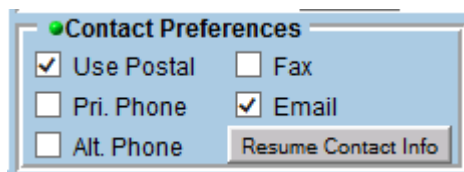
Employment Status: Select the appropriate option from the drop-down menu.

Contact Preferences: Select **Use Postal** as the Address is required to complete the customer record. Other preferences may additionally be selected if the information is provided in the corresponding data fields.
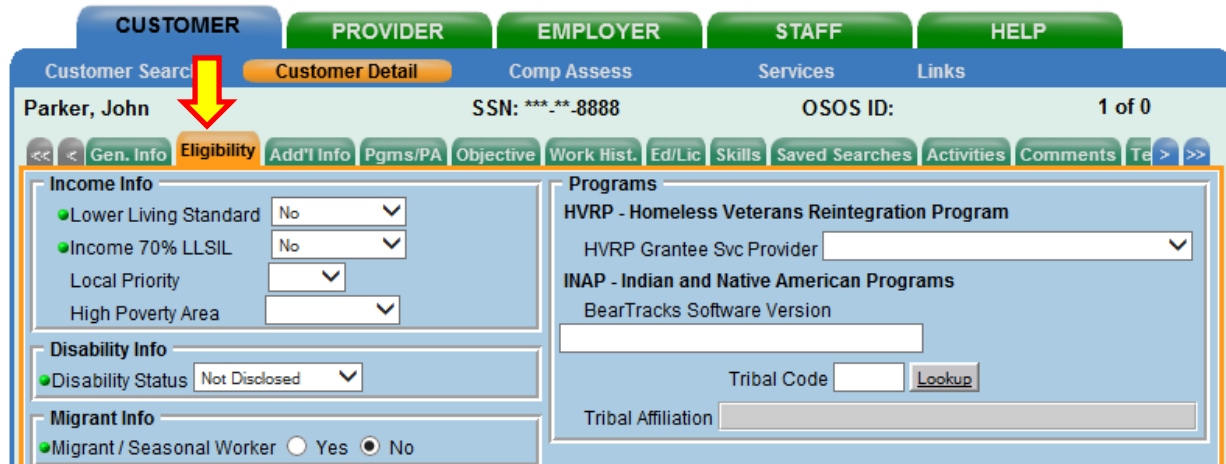
No further data is required on the **Gen. Info** tab. The next set of data required to complete a customer record is located in the **Eligibility** tab.

ELIGIBILITY TAB

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

High Poverty Area: This field is required for any customer 25 years old or younger and is one of the fields that determines eligibility for the WIOA Youth Program.
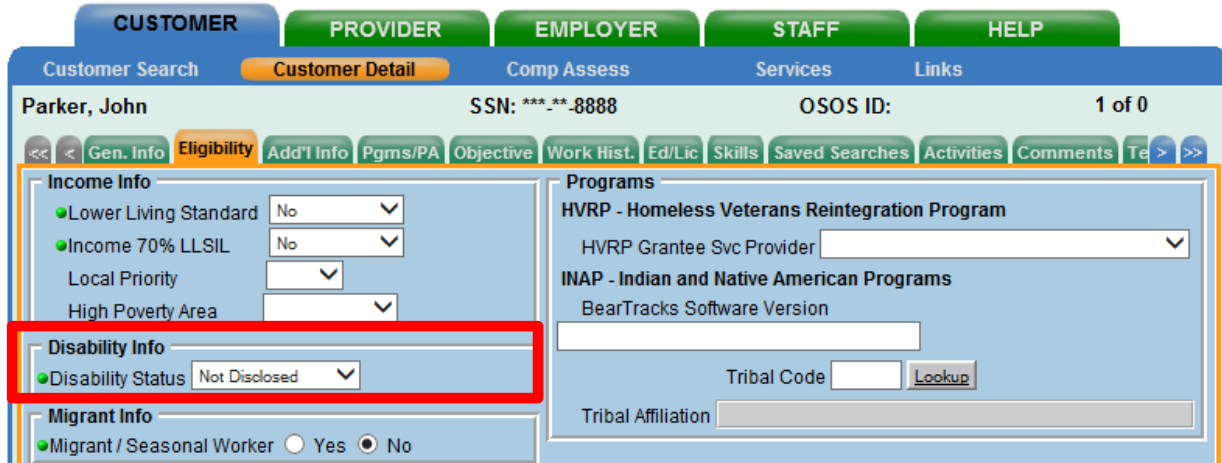
Income Info:

Lower Living Standard / Income 70% LLSIL: Select **Yes**, **No** or **Not Disclosed**. The Income Eligibility Guidelines can be found on the DOL Programs & Tools webpage: https://labor.ny.gov/workforcenypartners/tools.shtm

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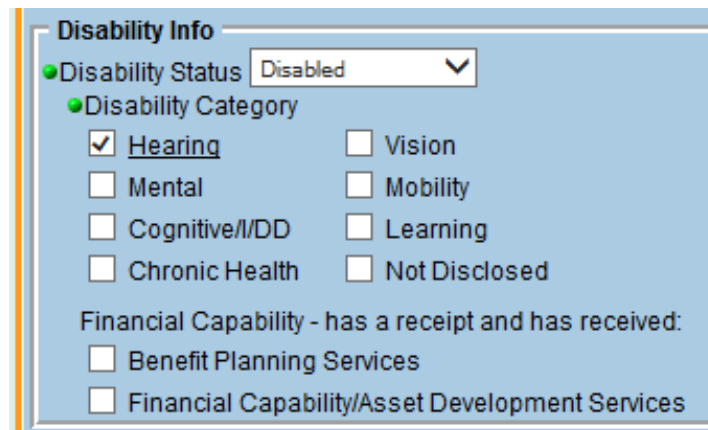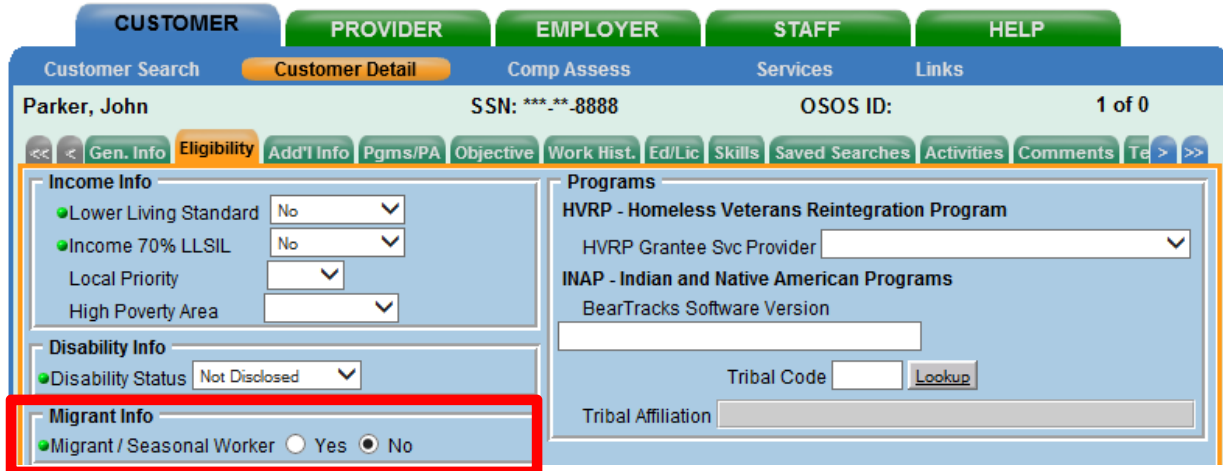
Disability Info:

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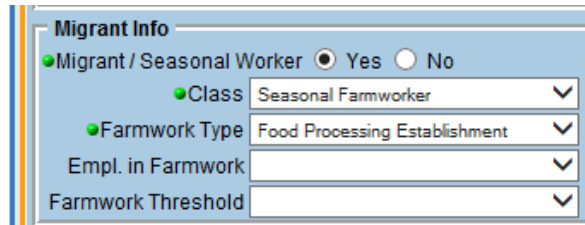
Migrant Info:

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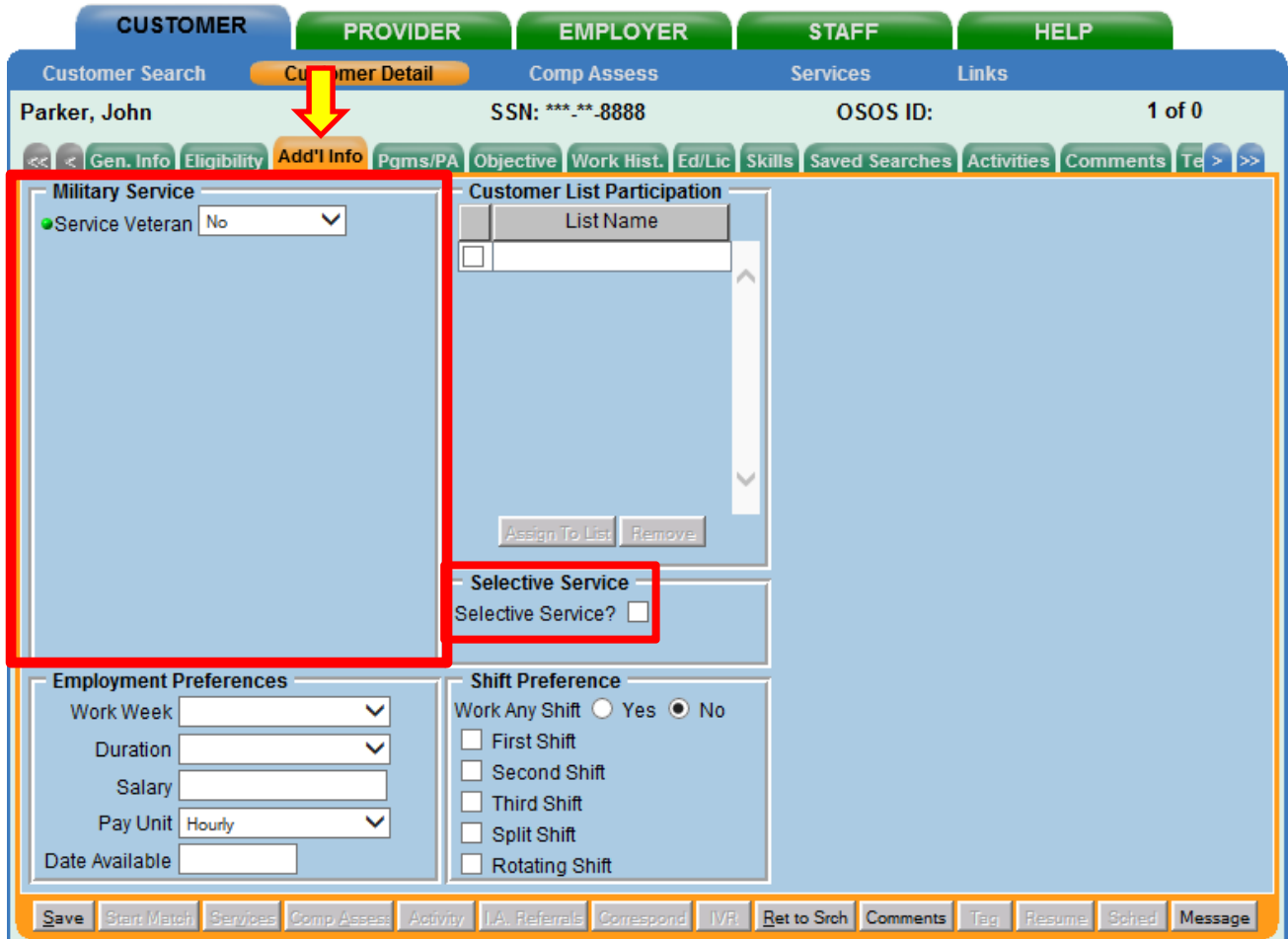

No further data is required in the **Eligibility** tab. The next set of data required to complete a customer record is located in the **Add'l Info** tab.

ADDITIONAL INFORMATION TAB

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

If the customer indicates Yes for **Service Veteran**, you must then select **Active Service**, **Transitioning Veteran**, or **Other Eligible**. Based on this selection, additional required fields may populate. Please reference the Veteran's Program - Terms and Definitions and the Military Service OSOS Guide for more information on completing this section.

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

 If the customer is a Veteran, you will also need to administer the Military Service Questionnaire (MSQ). The MSQ is used to determine Veteran status for Priority of Service and DVOP eligibility.

Required Field: Selective Service. All males over the age of 18 must be registered with Selective Service and this information must be recorded. Select the check box and enter the customer's Selective Service number. If the customer does not know their Selective Service number, click on **Register/Lookup**. This opens the Selective Service System website in a new

browser tab. Use this site to conduct online verification of selective service registration using the customer's last name, SSN and date of birth. For more information on Selective Service registration requirements for the Workforce Innovation and Opportunity Act, please see TA 12-9.1.
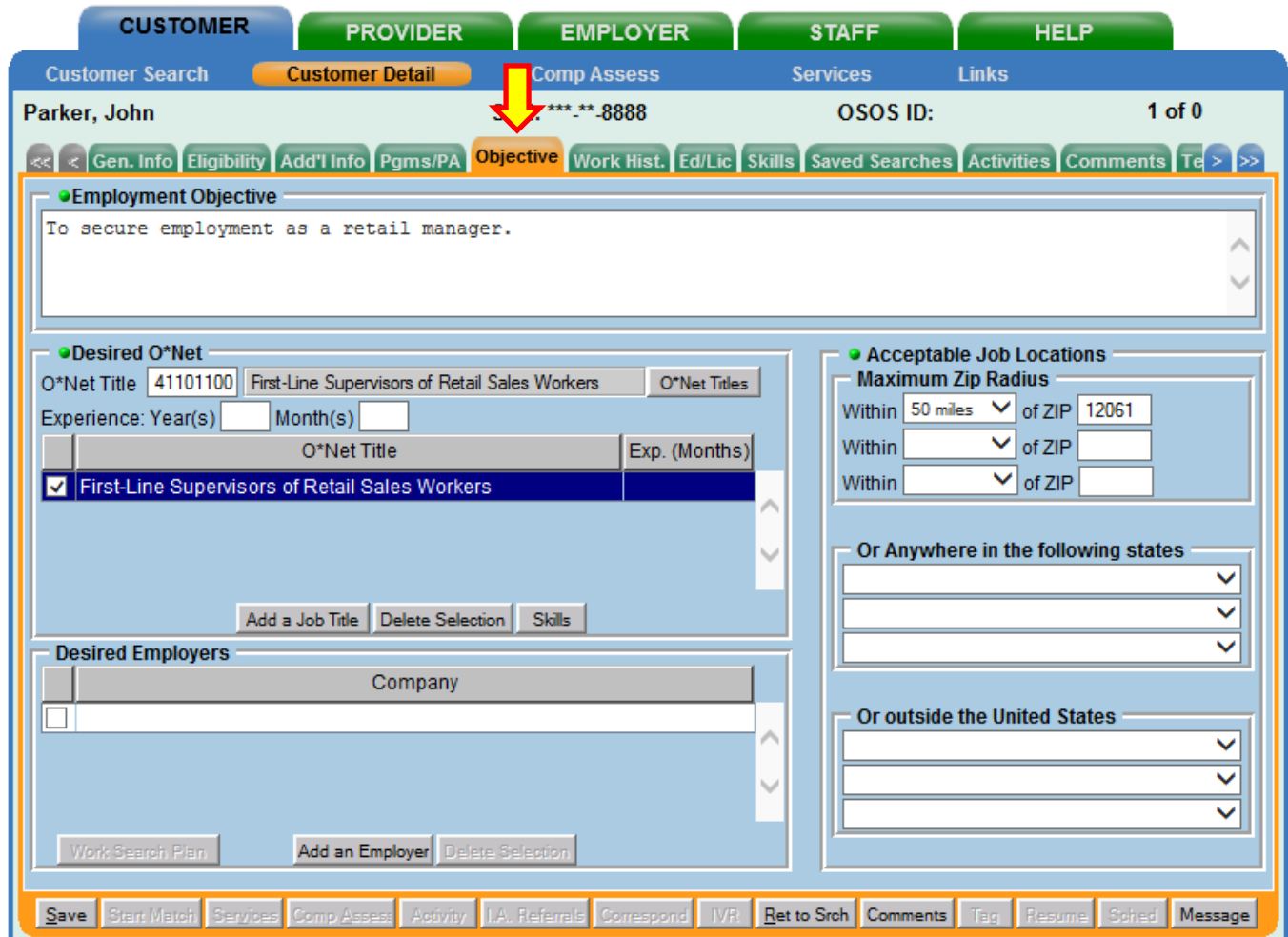

No further data is required on the **Additional Information** tab. The next set of data required to complete a customer record is located in the **Objective** tab.

*The **Pgms/PA** Tab contains no required information for a basic customer record. However, it is important to enter any available information into this tab because it shows the demographics of the customers we serve.*

OBJECTIVE TAB

Required Fields: Employment Objective, **Desired O*Net**, and **Acceptable Job Locations**.

*To complete the Employability Profile, you must enter the years and/or months of experience the customer has in the Desired O*Net Title.*
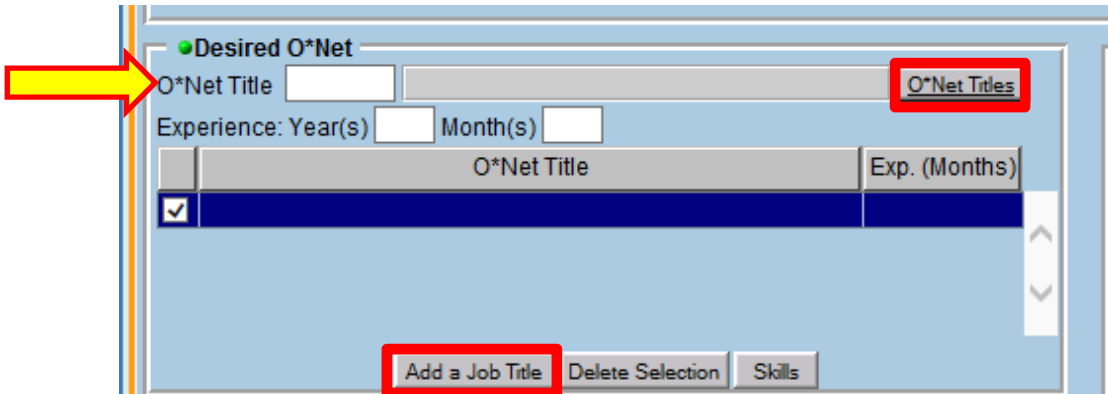
Employment Objective: This field is used to summarize the customer's employment objectives. It should succinctly and strongly emphasize the customer's qualifications and desired position. This field is a maximum of 4000 characters.

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

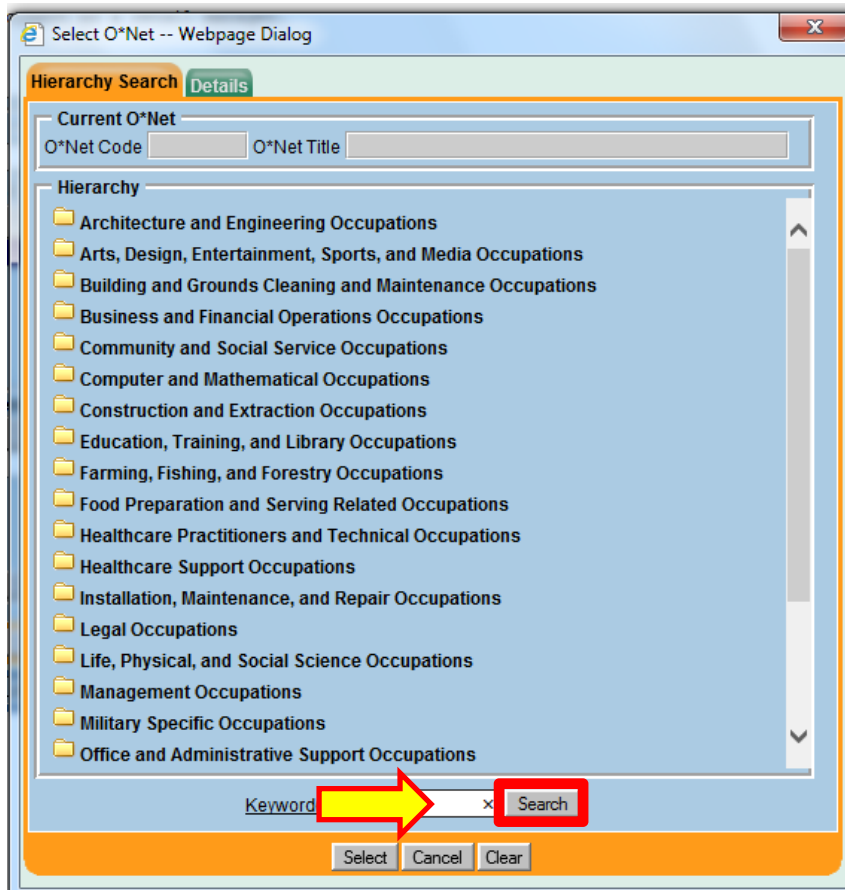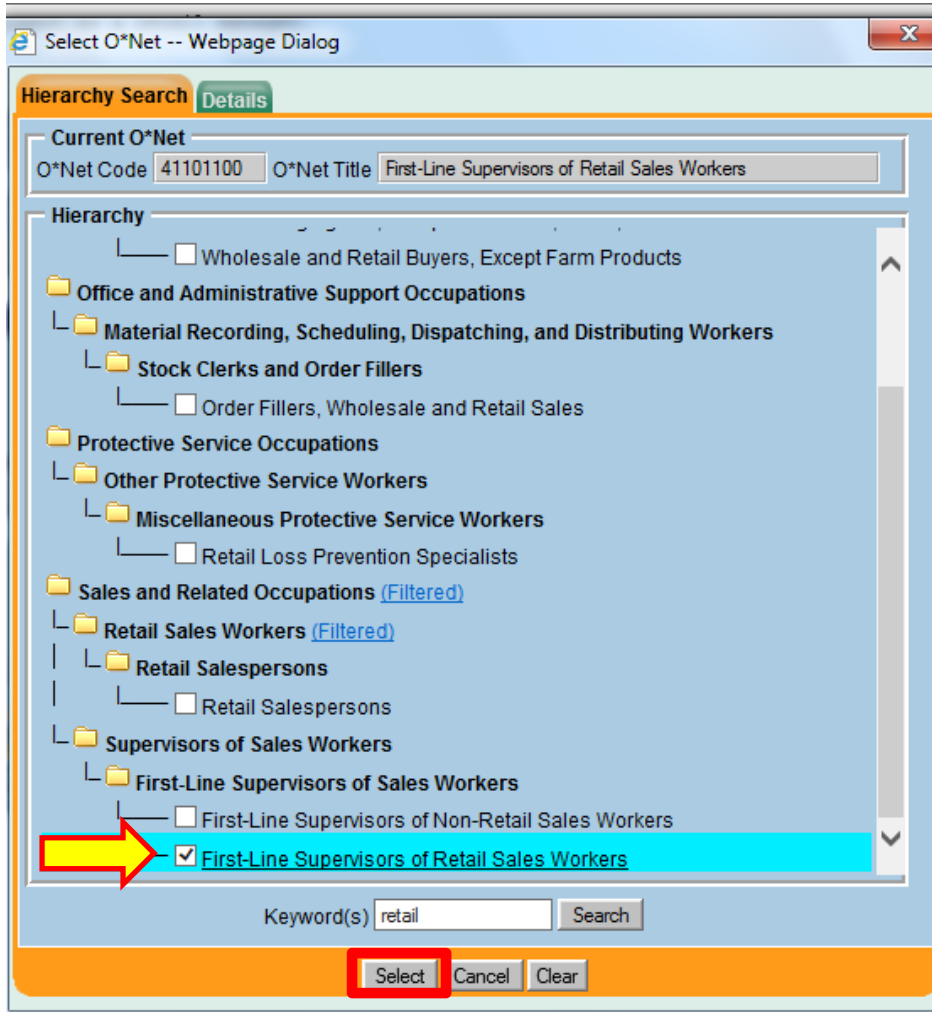Click the **O*Net Titles** button to display the Select O*Net webpage dialog box.

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

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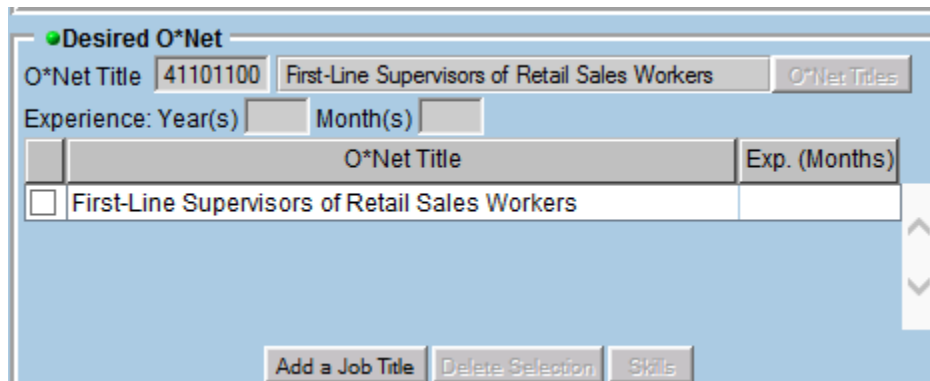

Once selected, the O*Net code and title then populate in the **Desired O*Net** fields of the **Objective** tab.
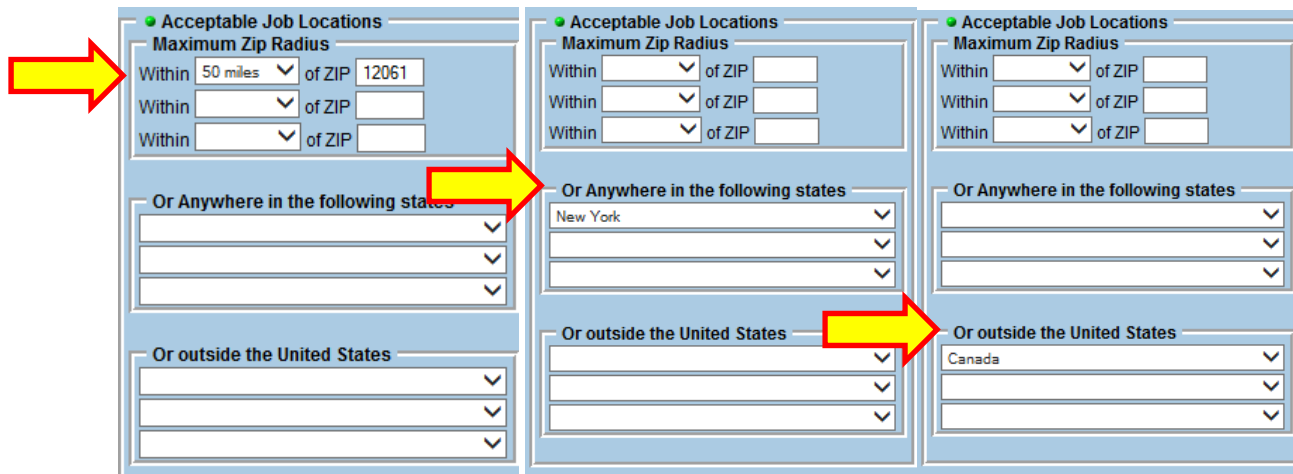
Multiple O*Net Titles can be added to **Desired O*Net**. It is best practice to enter years and/or months experience for every O*Net Title recorded.

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

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

No further data is required in the **Objective** tab. The next set of data required to complete a customer record is in the **Work History** tab.

WORK HISTORY TAB

Required fields: **Job Title**, **Employer**, **Start Date**, **End Date**, **Address**, **City**, **State**, **Zip**, **Country**, **Wage**, **Reason for Leaving**, and **Job Duties**.

*To complete the Employability Profile, each Job Title in the **Work History** tab must have an associated O*Net Code entered. To find the O*Net Code, click the **O*Net Titles** button. This will bring up a Webpage Dialogue Box where you can select a Job Title using the O*Net Hierarchy or the Search box. In addition, at least one O*Net code in the **Work History** tab must match a desired O*Net code in the **Objective** tab.*

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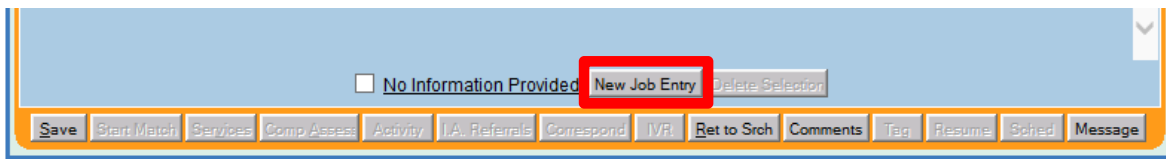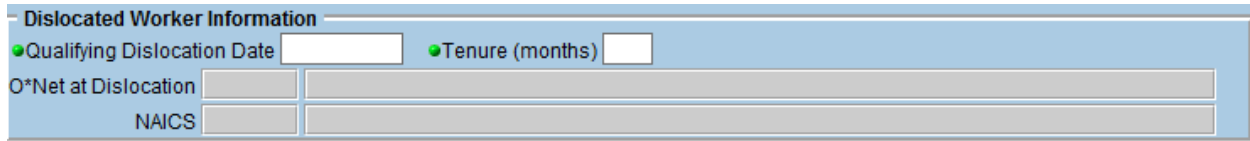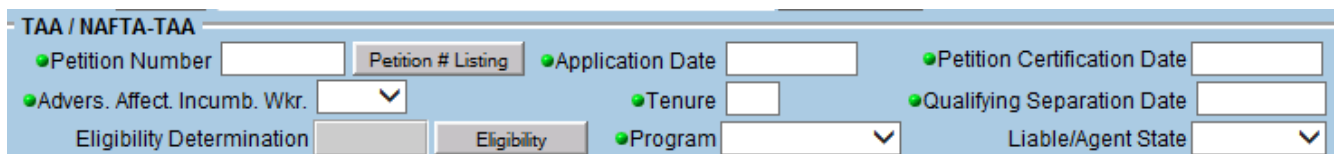

If the customer has more than one Work History, enter each position separately. Start each entry by clicking the **New Job Entry** button.

Select a Reason for Leaving for each position. If Category 1-DW, Category 2-DW mass layoff or closure, or Category 6 – DW Spouse of a member of the Armed Forces is selected, additional Dislocated Worker Information will be required.

If Category 5-DW Dislocated due to foreign trade is selected, additional TAA/NAFTA-TAA information will be required.

For additional information on dislocated workers, please see Dislocated Worker Definitions.

EDUCATION/LICENSES TAB

Required Fields: Certificates/Licenses, **Schools**, and **Professional Associations**.

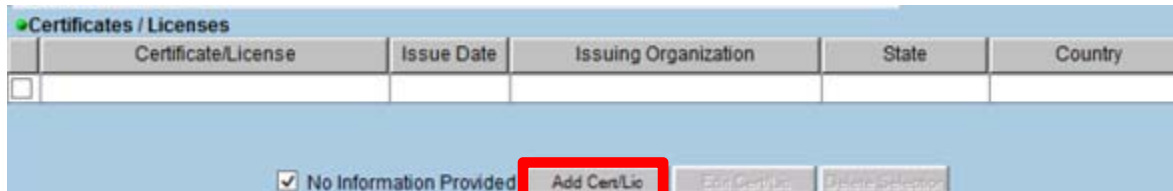*Information entered in these fields helps to create the customer's resume and conduct quality job matching and referrals.*

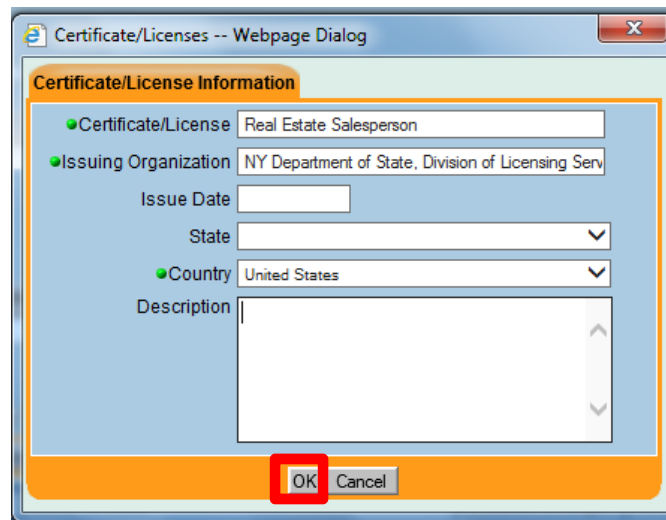**Certificates/Licenses:** To enter data, click the **Add Cert/Lic** button.
Required fields: Certificate/License, **Issuing Organization**, and **Country**.

When data entry is complete, click **OK**. If there is no data to enter, check the box for **No Information Provided.**
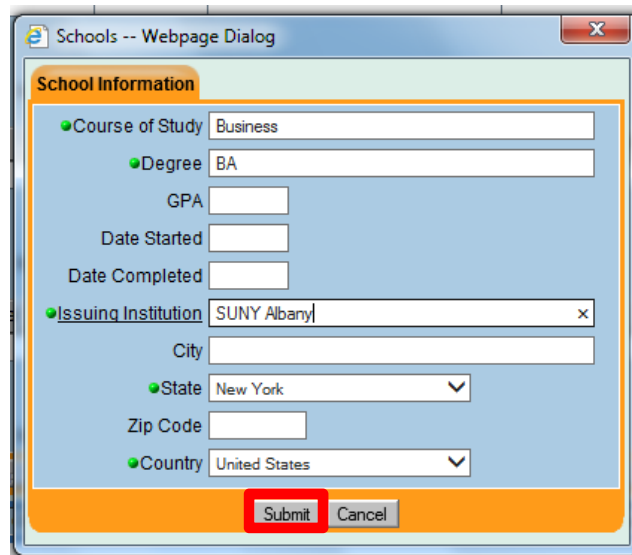
Schools: To enter data, click the **Add School** button.

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

When all appropriate fields are completed, click **Submit**. If there is no school data to enter, check the box for **No Information Provided**.

	Course of Study	Degree	Completed	Issuing Institution	State	Country
☐	Business	BA		SUNY Albany	New York	United States

Add School Edit School Delete Selection

Schools -- Webpage Dialog

School Information

Course of Study	Business
Degree	BA
GPA	
Date Started	
Date Completed	
Issuing Institution	SUNY Albany
City	
State	New York
Zip Code	
Country	United States

Submit Cancel

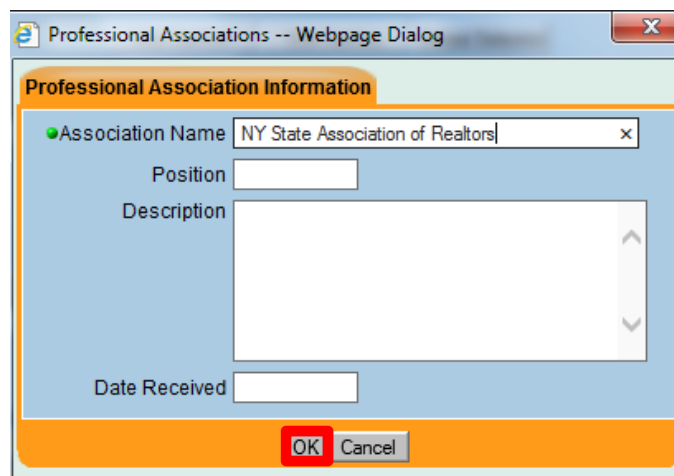**Professional Associations:** Select **Add Association**.

Required field: **Association Name**.

When all data is entered, click **OK**. If there is no Professional Association data to enter, check the box for **No Information Provided**.
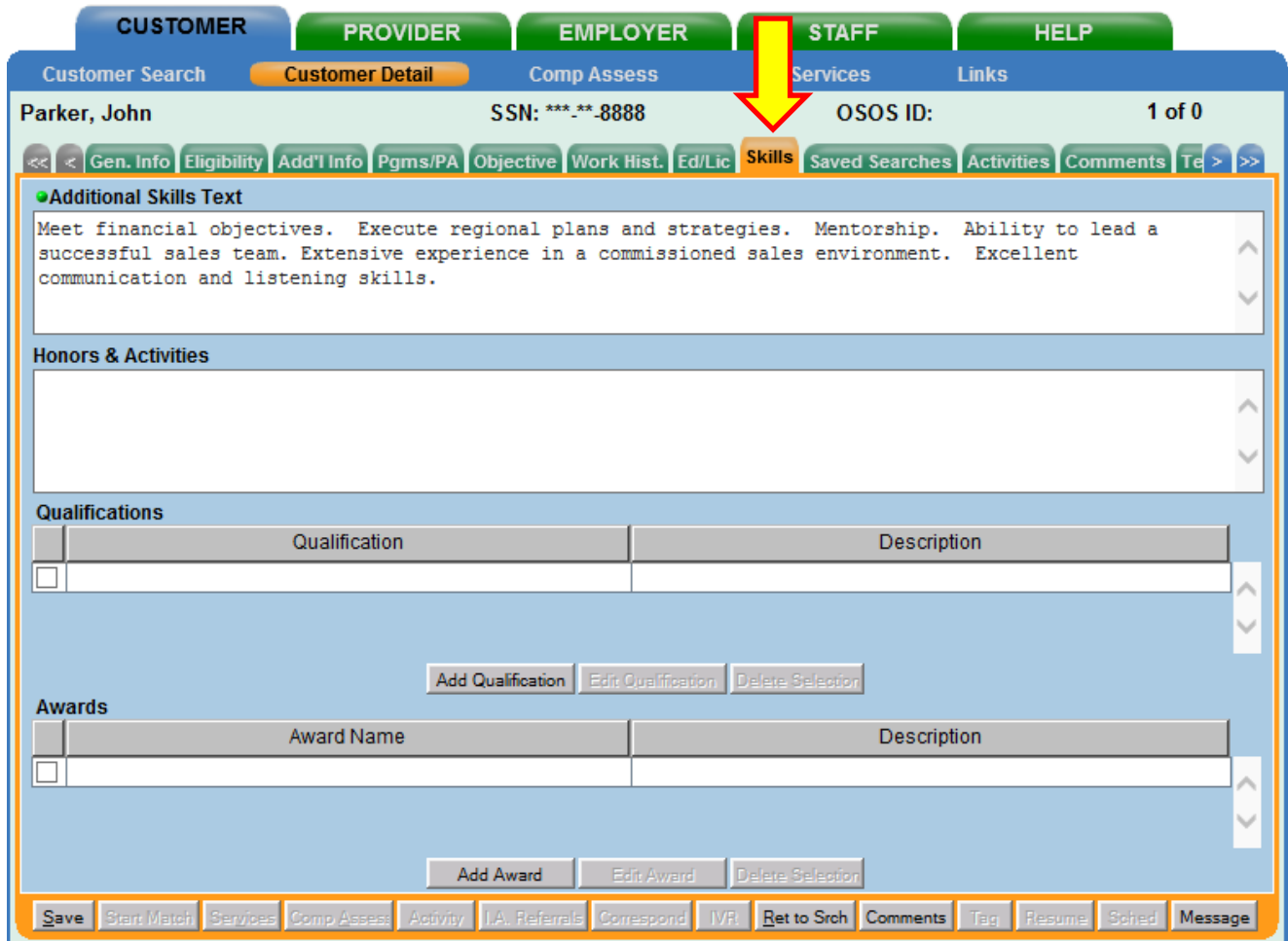

No further data is required in the **Ed/Lic** tab. The next set of required data is in the **Skills** tab.

SKILLS TAB
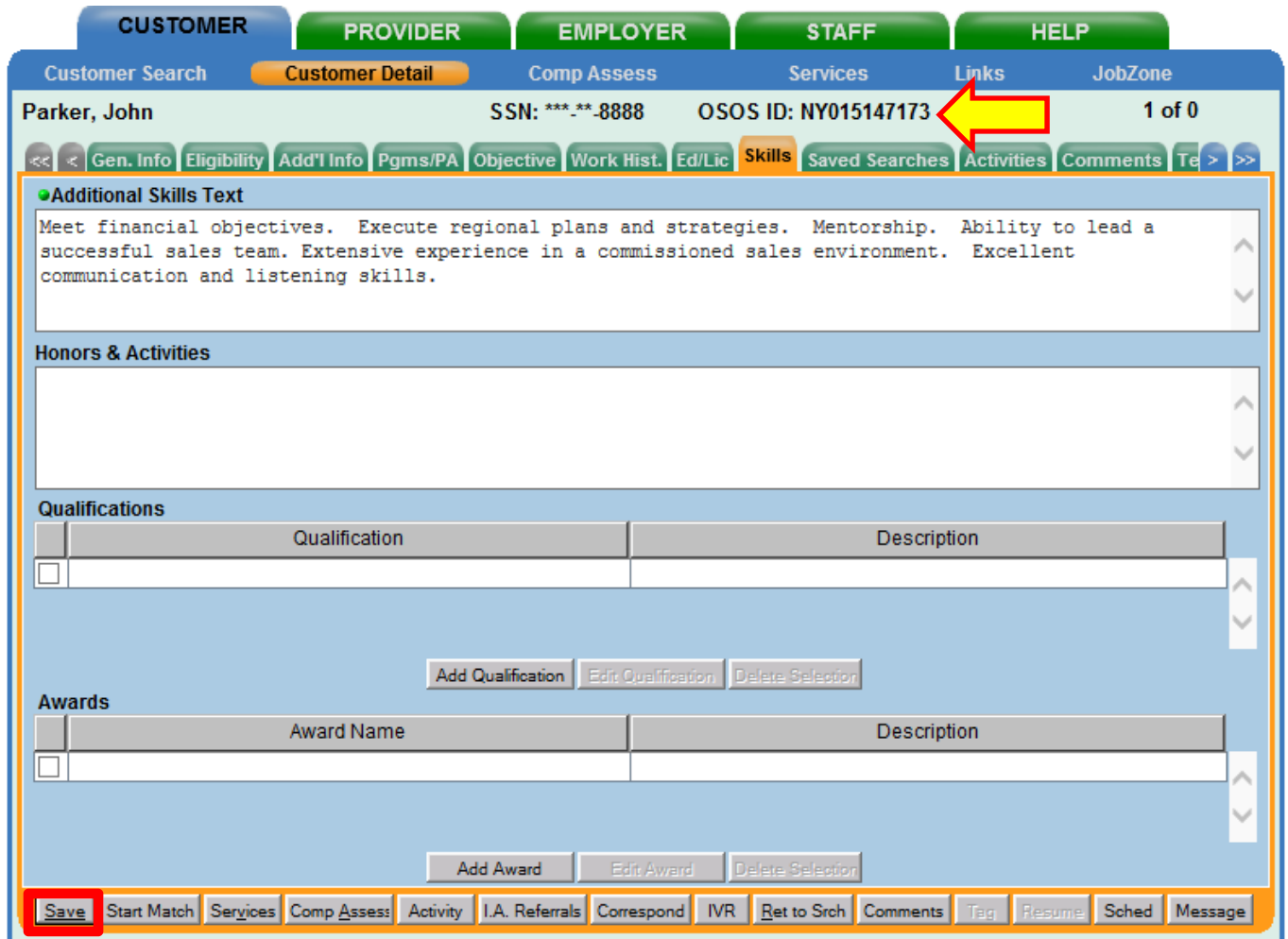

Required Field: Additional Skills Text.

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 customer record.

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.

If any required data is missing, an OSOS Error Message appears indicating what information is required to successfully save the customer record. Click **OK**.
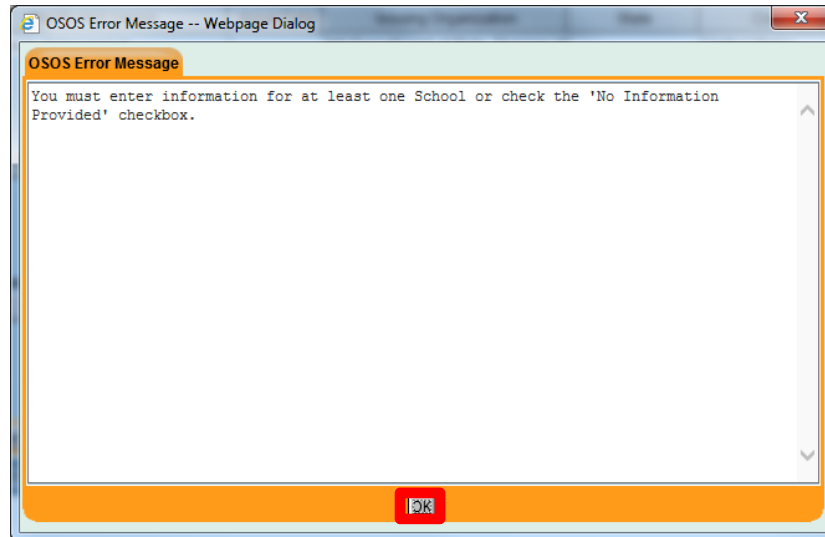
Navigate to the appropriate tab and complete the required data field(s). Click **Save.** The customer record will display the new OSOS ID when the customer record is successfully created.
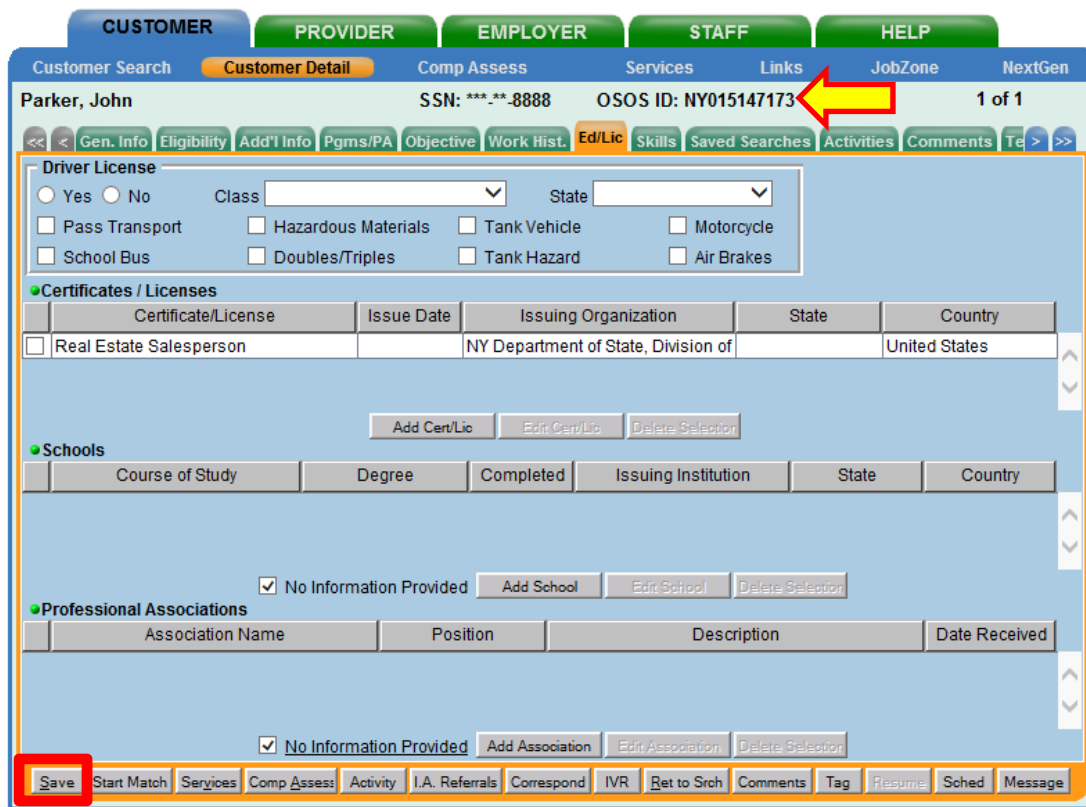
RESOURCES AND ASSISTANCE

Dislocated Worker Definitions

Income Eligibility Guidelines on DOL's Programs and Tools webpage:
https://labor.ny.gov/workforcenypartners/tools.shtm

Military Service OSOS Guide

OSOS Guide for Verifying Date of Birth in the DOB Tab

Performing a Customer Search OSOS Guide

Selective Service Registration Requirements Under the Workforce Innovation and Opportunity
Act: TA 12-9.1

Veteran's Program - Terms and Definitions

Additional program information, OSOS guides and other resources can be found at:
http://labor.ny.gov/workforcenypartners/osos.shtm

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