

Creating a Basic Customer Record OSOS Guide



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PURPOSE

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

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

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

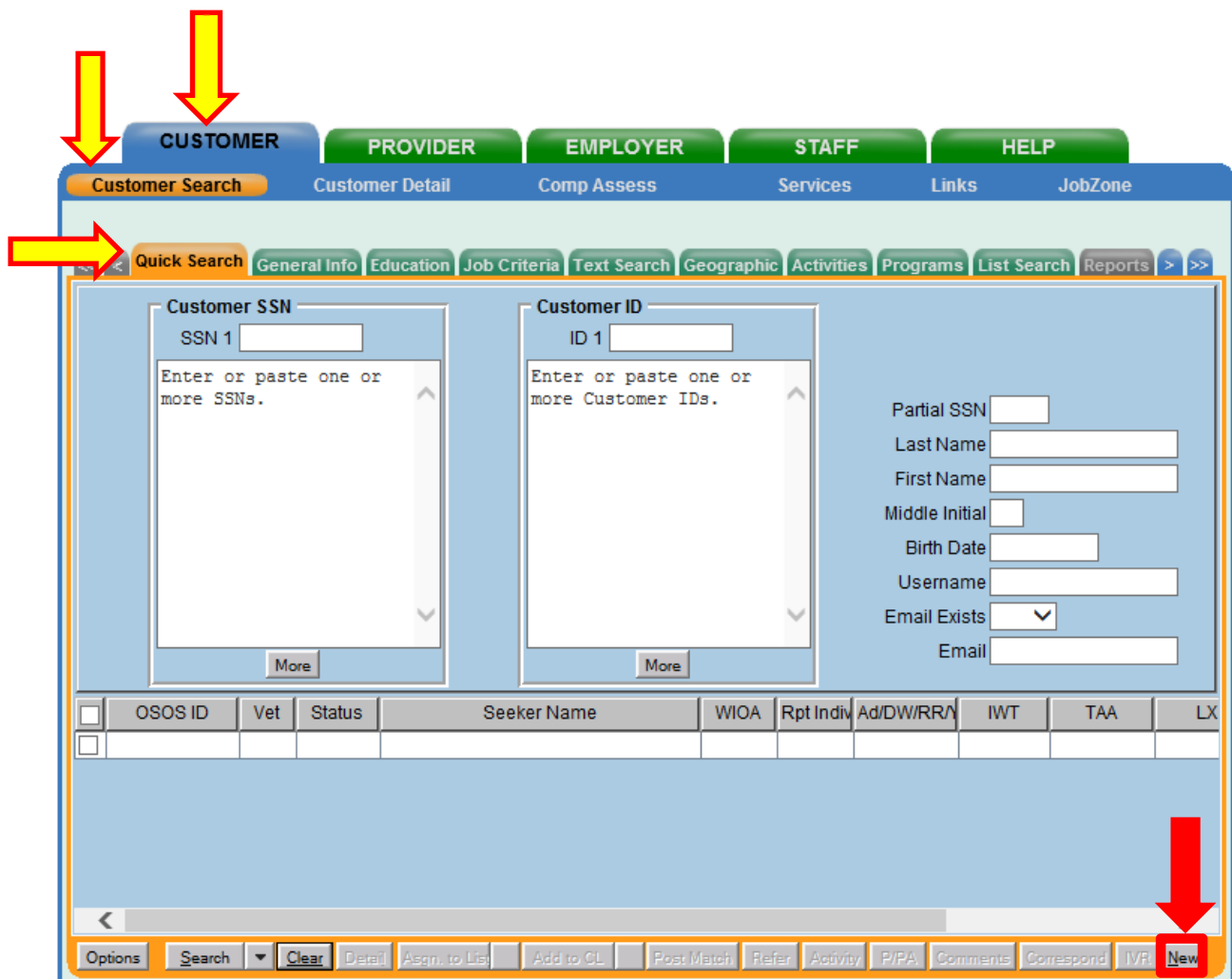
Please note, some customers may already have a customer record in OSOS. If the customer has received Unemployment Insurance, used Self-Service tools such as JobZone, or registered at a local career center, a record will exist for that customer. If a customer record already exists, staff would not create 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 customer's 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.



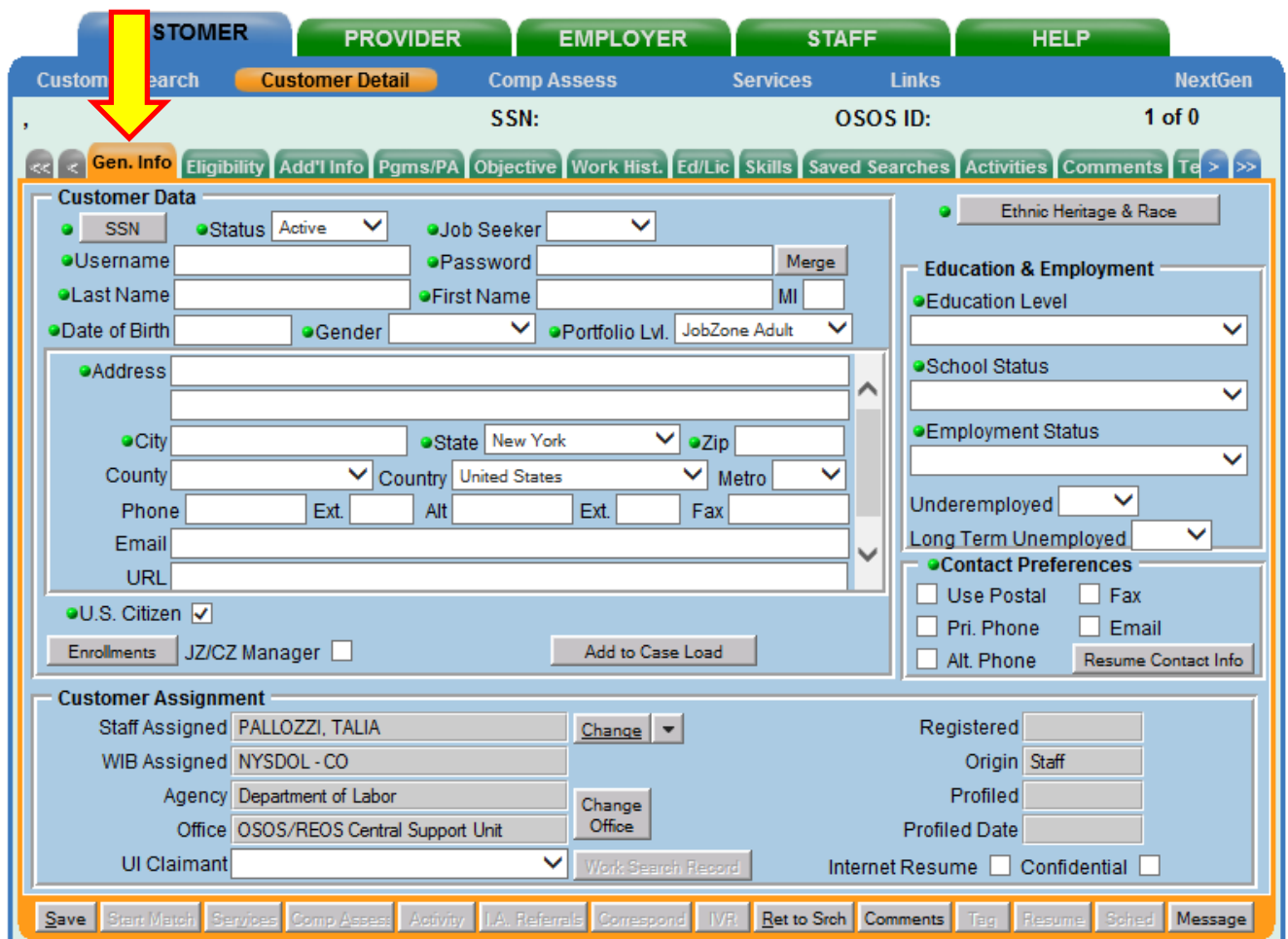
The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. A secondary row of tabs includes Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, Reports, and navigation arrows. The main form area contains input fields for Customer SSN (SSN 1), Customer ID (ID 1), Partial SSN, Last Name, First Name, Middle Initial, Birth Date, Username, Email Exists (dropdown), and Email. Below the form is a table with columns: OSOS ID, Vet, Status, Seeker Name, WIOA, Rpt Indiv, Ad/DW/RR/A, IWT, TAA, and LX. At the bottom, there is a toolbar with buttons: Options, Search, Clear, Detail, Assign. to Lis, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New. Red arrows point to the 'CUSTOMER' tab, the 'Quick Search' tab, and the 'New' button.

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.



The screenshot shows the OSOS Customer Detail form with the 'Gen. Info' tab selected. The form is organized into several sections:

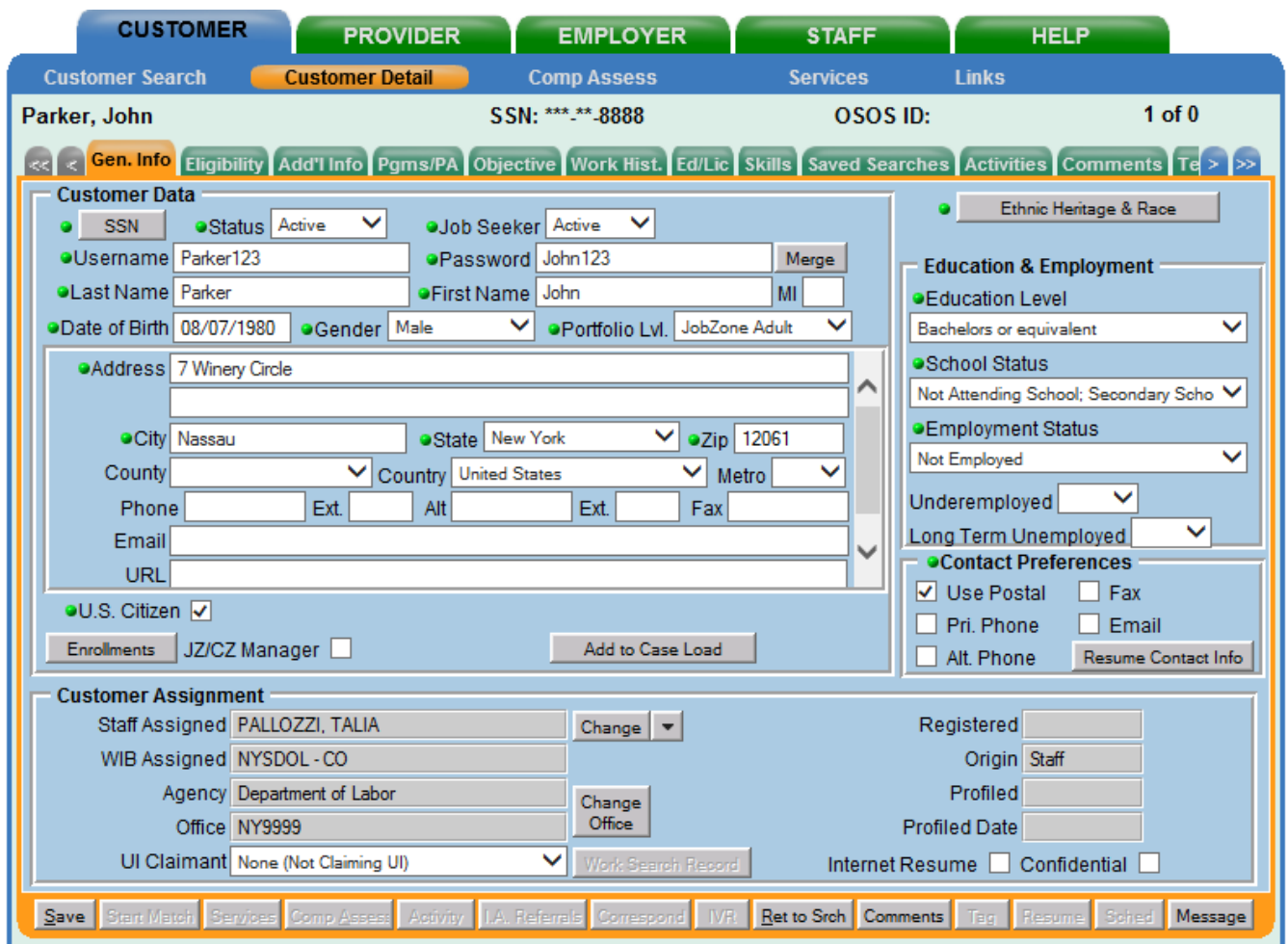
- Customer Data:** Includes fields for SSN, Status (Active), Job Seeker, Username, Password, Last Name, First Name, MI, Date of Birth, Gender, Portfolio Lvl. (JobZone Adult), Address, City, State (New York), Zip, County, Country (United States), Metro, Phone, Ext., Alt., Fax, Email, and URL. There is also a checkbox for 'U.S. Citizen' and a button for 'Add to Case Load'.
- Education & Employment:** Includes fields for Education Level, School Status, Employment Status, Underemployed, and Long Term Unemployed. There is also a section for Contact Preferences with checkboxes for Use Postal, Fax, Pri. Phone, Email, and Alt. Phone, and a button for Resume Contact Info.
- Customer Assignment:** Includes fields for Staff Assigned (PALLOZZI, TALIA), WIB Assigned (NYS DOL - CO), Agency (Department of Labor), Office (OSOS/REOS Central Support Unit), and UI Claimant. There are buttons for Change, Change Office, and Work Search Record. Other fields include Registered, Origin (Staff), Profiled, Profiled Date, Internet Resume, and Confidential.

The bottom of the form features a navigation bar with buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.



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.



CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links

Parker, John SSN: ***-**-8888 OSOS ID: 1 of 0

Gen. Info Eligibility Add'l Info Pgms/PA Objective Work Hist. Ed/Lic Skills Saved Searches Activities Comments Te >>

Customer Data

● SSN ● Status Active ● Job Seeker Active

● Username Parker123 ● Password John123 Merge

● Last Name Parker ● First Name John MI

● Date of Birth 08/07/1980 ● Gender Male ● Portfolio Lvl JobZone Adult

● Address 7 Winery Circle

● City Nassau ● State New York ● Zip 12061

County Country United States Metro

Phone Ext. Alt. Ext. Fax

Email

URL

● U.S. Citizen

Enrollments JZ/CZ Manager Add to Case Load

Customer Assignment

Staff Assigned PALLOZZI, TALIA Change

WIB Assigned NYSDDL - CO

Agency Department of Labor Change

Office NY9999 Office

UI Claimant None (Not Claiming UI) Work Search Record

Registered Origin Staff

Profiled Profiled Date

Internet Resume Confidential

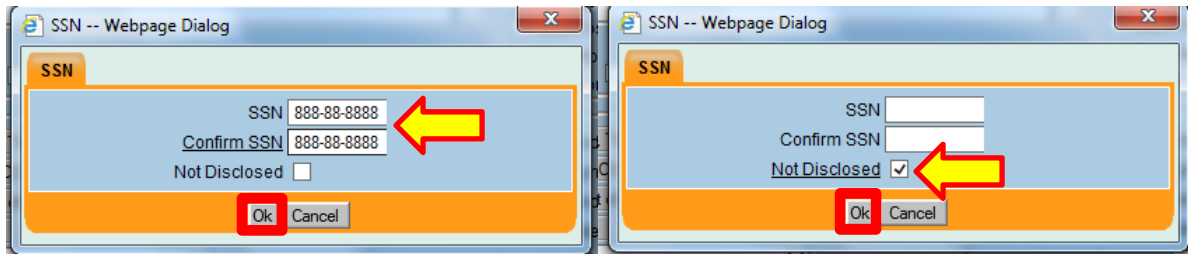
Save Start Match Services Comp Assess Activity I.A. Referrals Correspond IVR Ret to Srch Comments Tag Resume Sched Message



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)



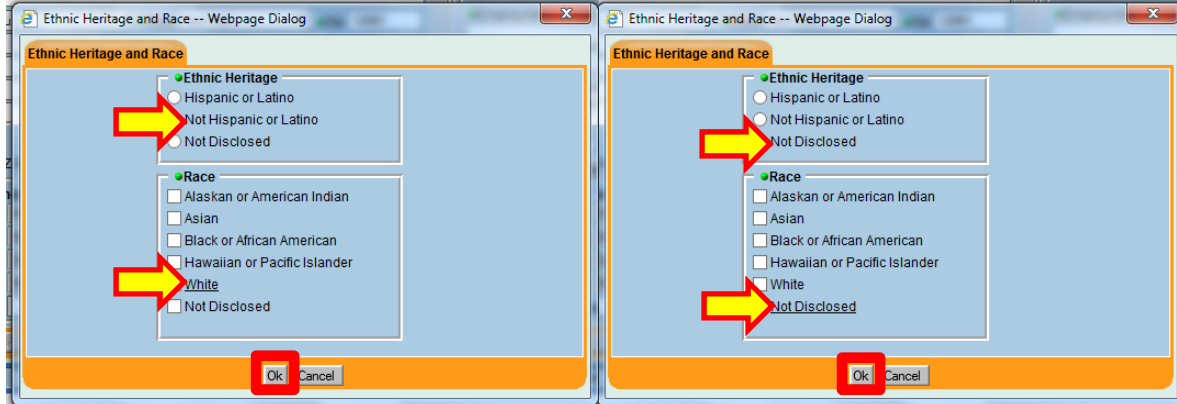
We do not collect this information in OSOS. Enter "Z999999999" for the customer's Alien Registration Number. When entering the **Expiration Date**, enter a date in the very distant future, such as "12/31/2199."

U.S. Citizen Alien Reg # Expires Permanent
 JZ/CZ Manager

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

The screenshot shows the OSOS Customer Detail page for John Parker. The page is divided into several sections: Customer Data, Customer Assignment, and Contact Preferences. The 'Ethnic Heritage & Race' button is highlighted with a red box. The 'Customer Data' section includes fields for SSN, Status, Job Seeker, Username, Password, Last Name, First Name, Date of Birth, Gender, Portfolio Lvl., Address, City, State, Zip, Country, Metro, Phone, Ext., Alt., Fax, Email, and URL. The 'Customer Assignment' section includes fields for Staff Assigned, WIB Assigned, Agency, Office, and UI Claimant. The 'Contact Preferences' section includes checkboxes for Use Postal, Fax, Pri. Phone, Email, and Alt. Phone, and a 'Resume Contact Info' 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:

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links

Parker, John SSN: ***-**-8888 OSOS ID: 1 of 0

Gen. Info Eligibility Add'l Info Pgms/PA Objective Work Hist. Ed/Lic Skills Saved Searches Activities Comments Te >>

Customer Data

SSN
 Status Active
 Job Seeker Active
 Ethnic Heritage & Race

Username Parker123
 Password John123 Merge

Last Name Parker
 First Name John MI

Date of Birth 08/07/1980
 Gender Male
 Portfolio Lvl. JobZone Adult

Address 7 Winery Circle

City Nassau
 State New York
 Zip 12061

County Country United States Metro

Phone Ext. Alt Ext. Fax

Email

URL

U.S. Citizen

Enrollments JZ/CZ Manager Add to Case Load

Education & Employment

Education Level Bachelors or equivalent

School Status Not Attending School; Secondary Scho

Employment Status Not Employed

Underemployed

Long Term Unemployed

Contact Preferences

Use Postal Fax

Pri. Phone Email

Alt. Phone Resume Contact Info

Customer Assignment

Staff Assigned PALLOZZI, TALIA Change

WIB Assigned NYSDOL - CO

Agency Department of Labor Change Office

Office NY9999

UI Claimant None (Not Claiming UI) Work Search Record

Registered Origin Staff

Profiled Profiled Date

Internet Resume Confidential

Save Start Match Services Comp Assess Activity I.A. Referrals Correspond IVR Ret to Srch Comments Tag Resume Sched Message

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

Education & Employment

● Education Level

- No Grade
- 1 Grade
- 2 Grade
- 3 Grade
- 4 Grade
- 5 Grade
- 6 Grade
- 7 Grade
- 8 Grade
- 9 Grade
- 10 Grade
- 11 Grade
- 12 Grade - no Diploma
- High School Equivalency
- 12 Grade - HS Graduate
- Disabled w/Cert./IEP
- HS + 1 yr Postsecondary - No Degree
- HS + 2 yr Postsecondary - No Degree
- HS + 3 yr Postsecondary - No Degree
- HS + 1 yr Vocational Certificate
- HS + 2 yr Vocational Certificate
- HS + 3 yr Vocational Certificate
- HS + 1 yr Associates Degree
- HS + 2 yr Associates Degree
- HS + 3 yr Associates Degree
- Bachelors or equivalent
- Masters Degree
- Doctorate Degree



*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.

Education & Employment

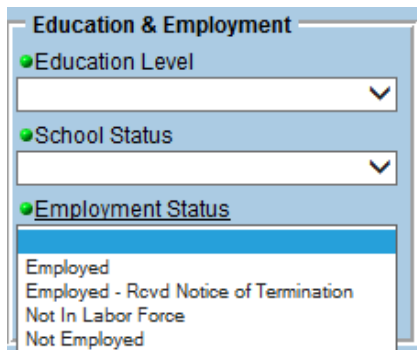
● Education Level

▼

● School Status

- 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
- Not Attending School; Within Compulsory Age

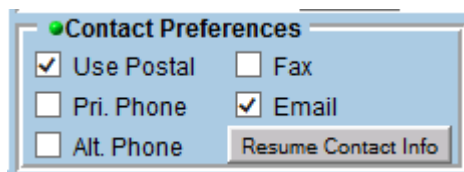
Employment Status: Select the appropriate option from the drop-down menu.



Education & Employment

- Education Level
- School Status
- Employment Status
 - Employed
 - Employed - Rcvd Notice of Termination
 - Not In Labor Force
 - Not Employed

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.

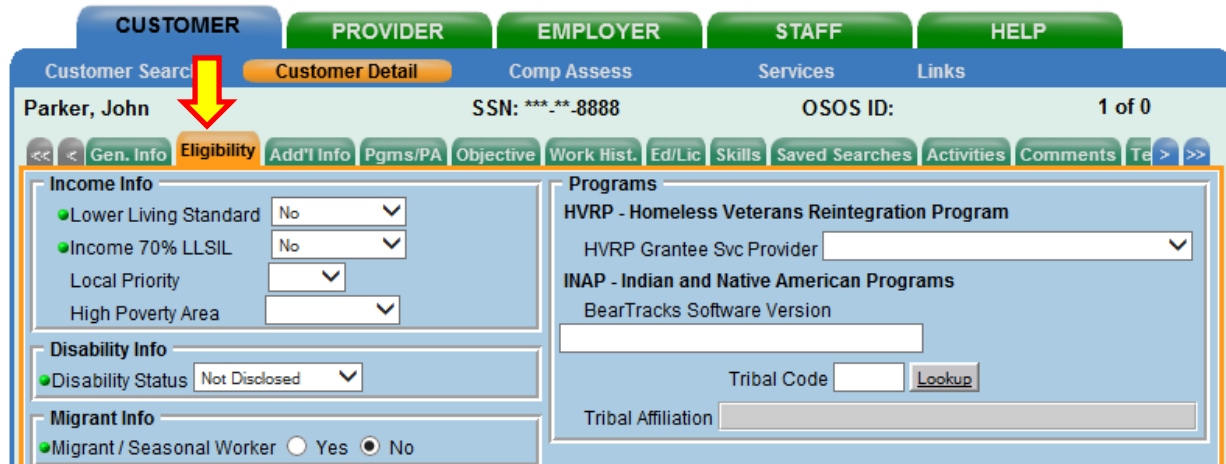


Contact Preferences

- Use Postal
- Fax
- Pri. Phone
- Email
- Alt. Phone
-

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



Customer Search **Customer Detail** Comp Assess Services Links

Parker, John SSN: ***-**-8888 OSOS ID: 1 of 0

Gen. Info **Eligibility** Add'l Info Pgms/PA Objective Work Hist. Ed/Lic Skills Saved Searches Activities Comments Te >>

Income Info

- Lower Living Standard No
- Income 70% LLSIL No
- Local Priority
- High Poverty Area

Disability Info

- Disability Status Not Disclosed

Migrant Info

- Migrant / Seasonal Worker Yes No

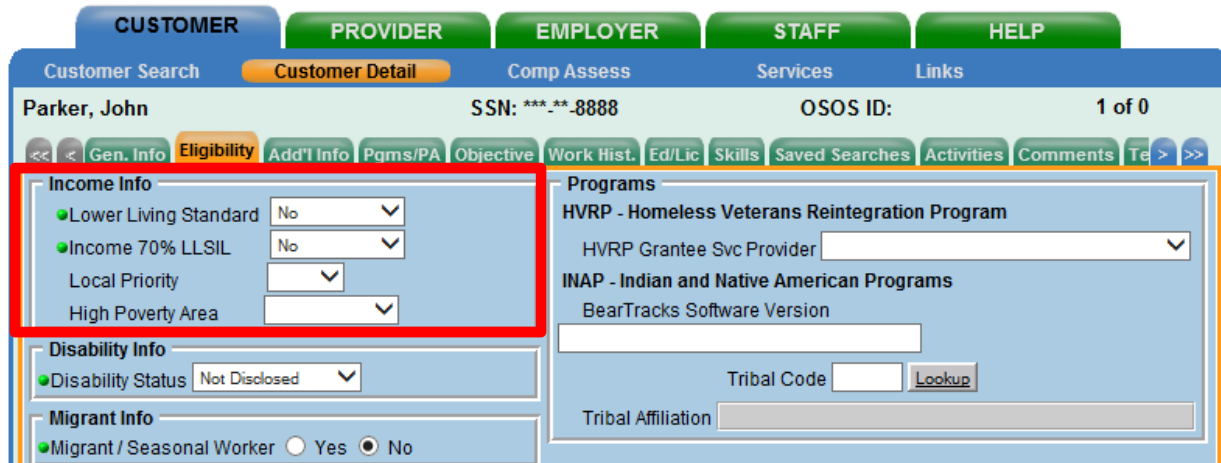
Programs

- HVRP - Homeless Veterans Reintegration Program
- HVRP Grantee Svc Provider
- INAP - Indian and Native American Programs
- BearTracks Software Version
- Tribal Code
- Tribal Affiliation

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:



Customer Search **Customer Detail** Comp Assess Services Links

Parker, John SSN: ***-**-8888 OSOS ID: 1 of 0

Gen. Info **Eligibility** Add'l Info Pgms/PA Objective Work Hist. Ed/Lic Skills Saved Searches Activities Comments Te >>

Income Info

- Lower Living Standard No
- Income 70% LLSIL No
- Local Priority
- High Poverty Area

Disability Info

- Disability Status Not Disclosed

Migrant Info

- Migrant / Seasonal Worker Yes No

Programs

- HVRP - Homeless Veterans Reintegration Program
- HVRP Grantee Svc Provider
- INAP - Indian and Native American Programs
- BearTracks Software Version
- Tribal Code
- Tribal Affiliation

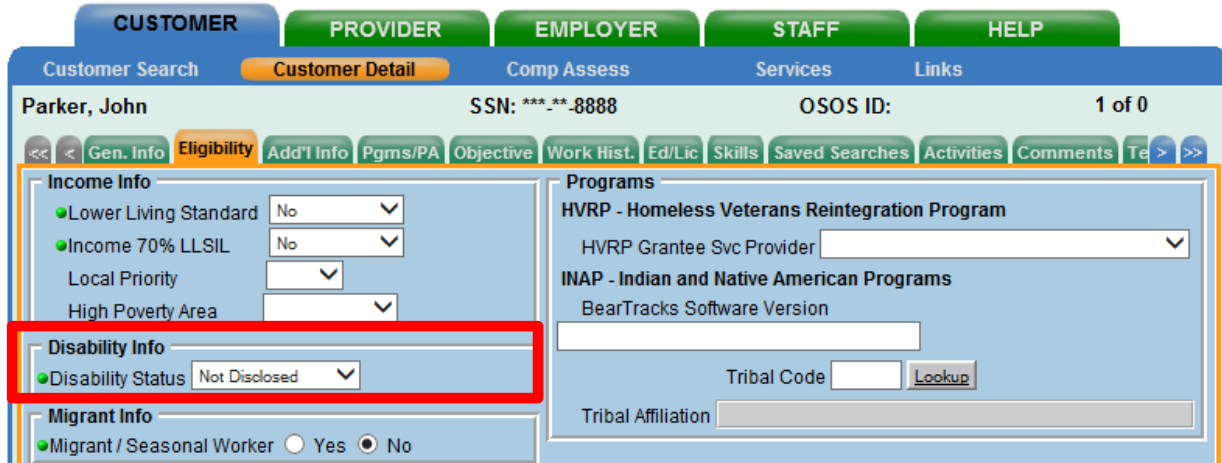
Lower Living Standard / Income 70% LLSIL: Select **Yes**, **No** or **Not Disclosed**. The Income Eligibility Guidelines can be found on the DOL Programs & Tools webpage:

<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.*

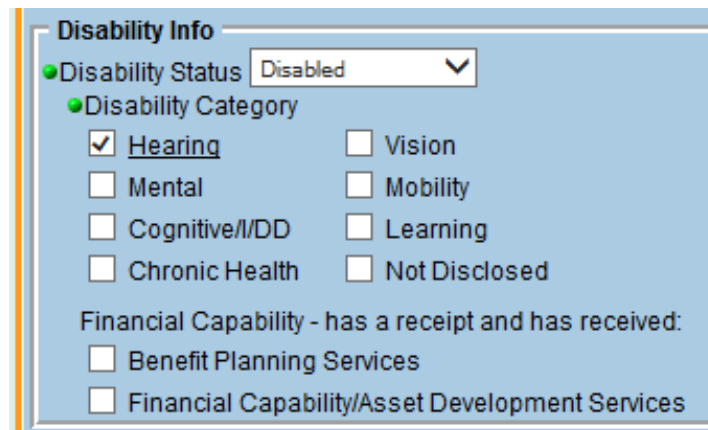
Disability Info:



The screenshot shows the OSOS Customer Detail page for John Parker (SSN: ***-**-8888, OSOS ID: 1 of 0). The 'Eligibility' tab is active. The 'Disability Info' section is highlighted with a red box and contains the following fields:

- Disability Status: Not Disclosed (dropdown menu)

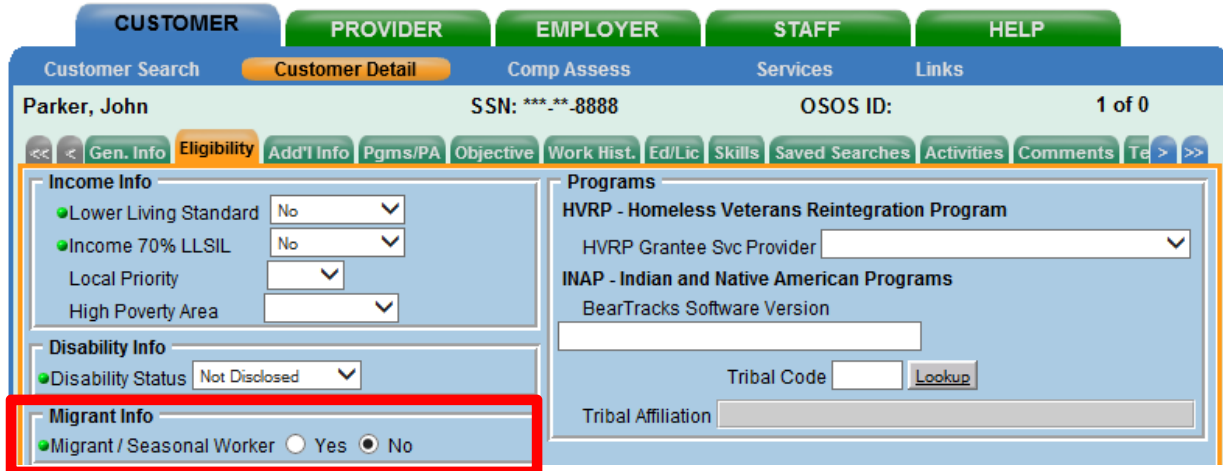
Disability Status: Select Not Disabled, Not Disclosed, or Disabled. Selecting Disabled will display additional required fields. If Disabled is selected, you must select at least one choice under Disability Category.



This close-up shows the 'Disability Info' section with the following details:

- Disability Status: Disabled (dropdown menu)
- Disability Category:
 - Hearing
 - Mental
 - Cognitive/IDD
 - Chronic Health
 - Vision
 - Mobility
 - Learning
 - Not Disclosed
- Financial Capability - has a receipt and has received:
 - Benefit Planning Services
 - Financial Capability/Asset Development Services

Migrant Info:



Customer Search | **Customer Detail** | Comp Assess | Services | Links

Parker, John | SSN: ***-**-8888 | OSOS ID: 1 of 0

Gen. Info | **Eligibility** | Add'l Info | Pgms/PA | Objective | Work Hist. | Ed/Lic | Skills | Saved Searches | Activities | Comments | Te | >>

Income Info

- Lower Living Standard: No
- Income 70% LLSIL: No
- Local Priority: [Dropdown]
- High Poverty Area: [Dropdown]

Disability Info

- Disability Status: Not Disclosed

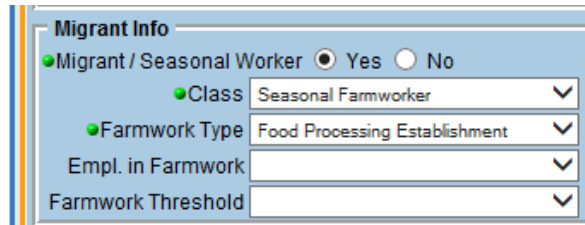
Migrant Info

- Migrant / Seasonal Worker: Yes No

Programs

- HVRP - Homeless Veterans Reintegration Program
 - HVRP Grantee Svc Provider: [Dropdown]
- INAP - Indian and Native American Programs
 - BearTracks Software Version: [Text]
 - Tribal Code: [Text] [Lookup](#)
 - Tribal Affiliation: [Text]

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**.

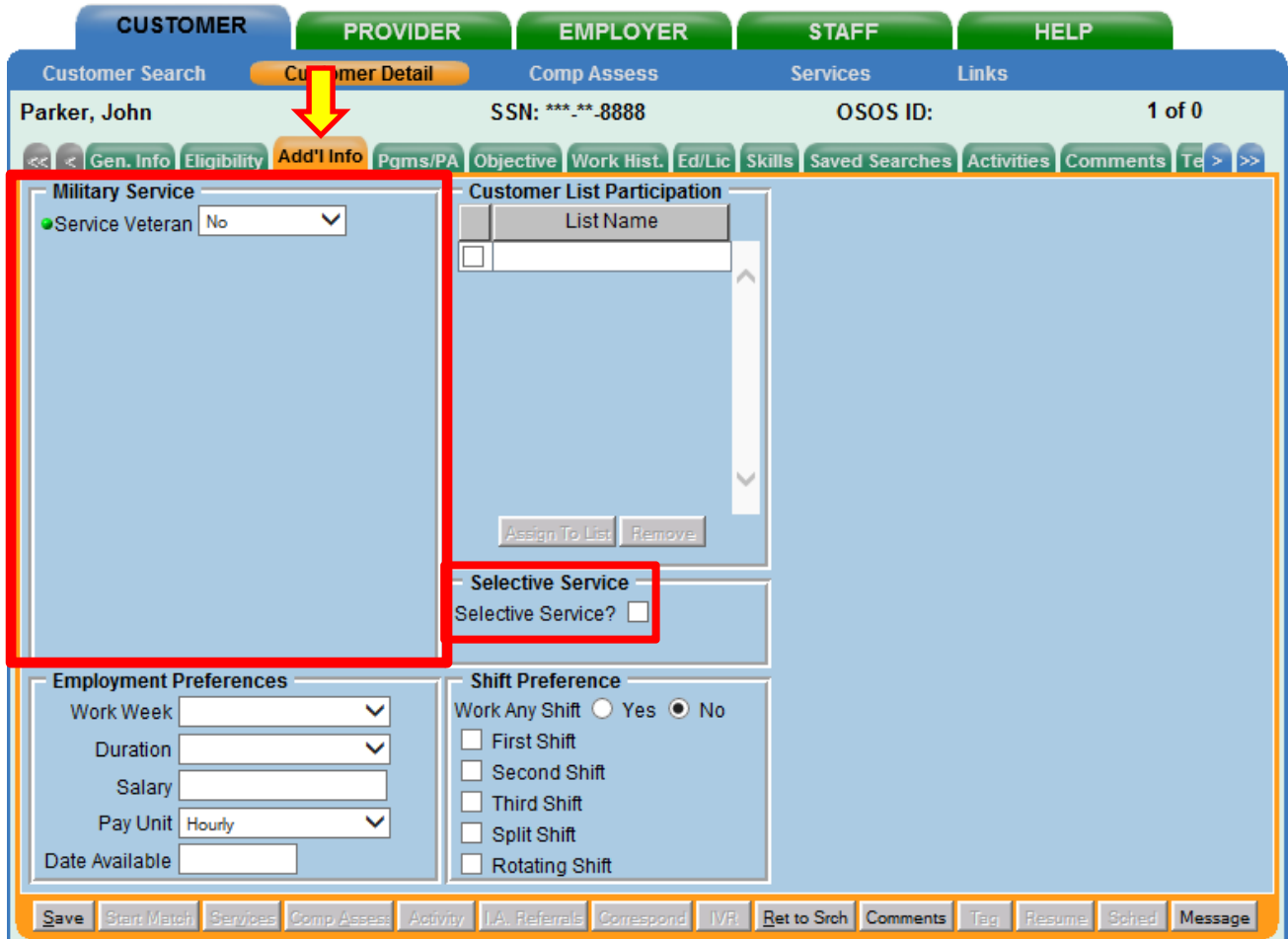


Migrant Info

- Migrant / Seasonal Worker: Yes No
 - Class: Seasonal Farmworker
 - Farmwork Type: Food Processing Establishment
 - Empl. in Farmwork: [Text]
 - Farmwork Threshold: [Text]

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



The screenshot displays the 'Customer Detail' page for John Parker. The 'Add'l Info' tab is selected, and a red arrow points to it. The 'Military Service' section is highlighted with a red box and contains a 'Service Veteran' dropdown menu set to 'No'. The 'Selective Service' section is also highlighted with a red box and contains a 'Selective Service?' checkbox. Other sections include 'Customer List Participation' with an 'Assign To List' button, 'Employment Preferences' with fields for Work Week, Duration, Salary, Pay Unit, and Date Available, and 'Shift Preference' with radio buttons for 'Work Any Shift' (Yes/No) and checkboxes for First, Second, Third, Split, and Rotating Shifts. The bottom of the page features a navigation bar with buttons for Save, Start Match, Services, Comp Assess, Activity, IA Referrals, Correspond, IVR, Ret to Sroh, Comments, Tag, Resume, Sched, and Message.

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.

Military Service

Service Veteran Yes

Active Service

Transitioning Veteran

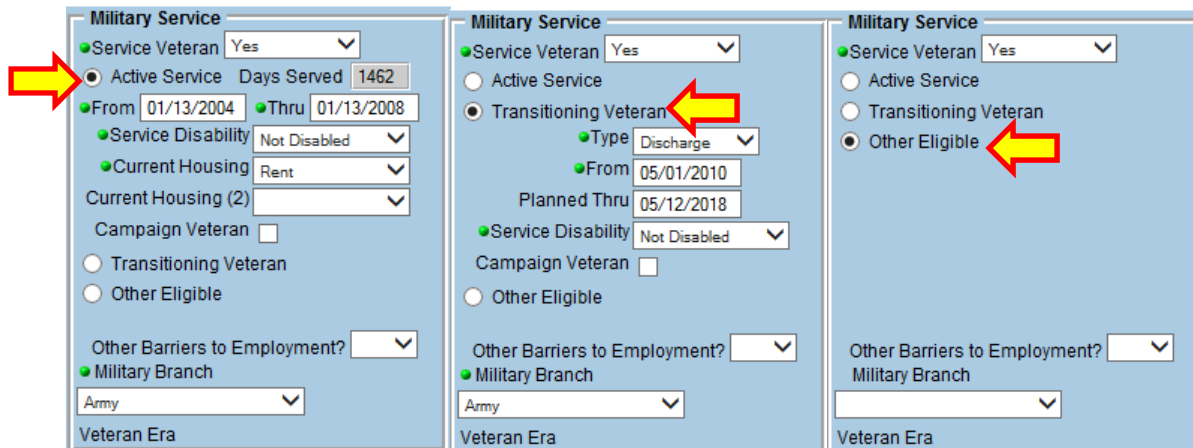
Other Eligible

Other Barriers to Employment?

Military Branch

Veteran Era

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.



Military Service

Service Veteran Yes

Active Service Days Served 1462

From 01/13/2004 Thru 01/13/2008

Service Disability Not Disabled

Current Housing Rent

Current Housing (2)

Campaign Veteran

Transitioning Veteran

Other Eligible

Other Barriers to Employment?

Military Branch

Army

Veteran Era

Military Service

Service Veteran Yes

Active Service

Transitioning Veteran

Type Discharge

From 05/01/2010

Planned Thru 05/12/2018

Service Disability Not Disabled

Campaign Veteran

Other Eligible

Other Barriers to Employment?

Military Branch

Army

Veteran Era

Military Service

Service Veteran Yes

Active Service

Transitioning Veteran

Other Eligible

Other Barriers to Employment?

Military Branch

Veteran Era

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](#).

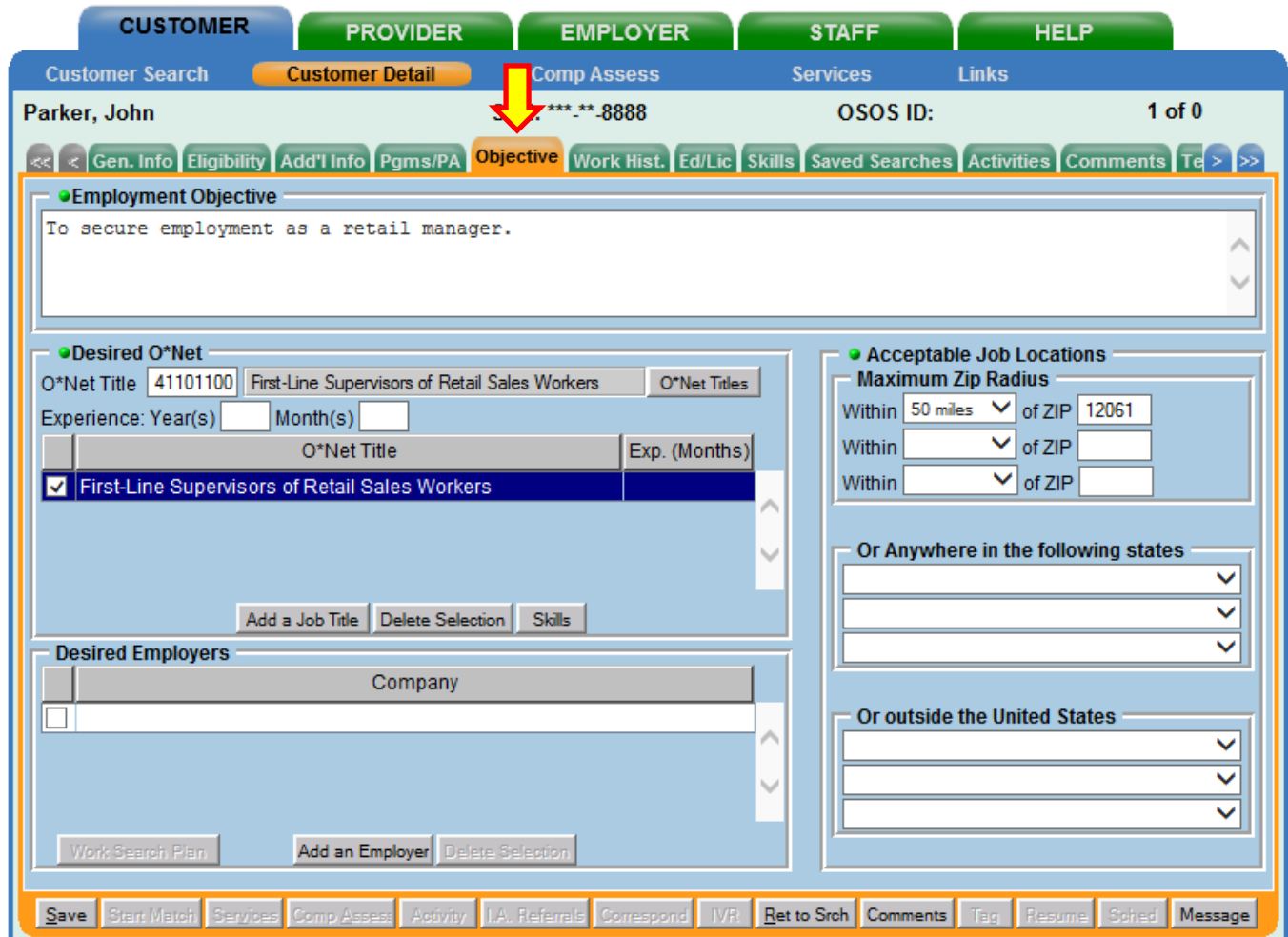
A screenshot of a web form titled 'Selective Service'. The form has a light blue background and a white border. At the top, the title 'Selective Service' is displayed. Below the title, there is a label 'Selective Service?' followed by a checked checkbox. A yellow arrow points to the checkbox. Below the checkbox is a text input field with a '#' symbol to its left. To the right of the input field is a button labeled 'Register/Lookup', which is highlighted with a red rectangular border.

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



Customer Detail | Parker, John | ***-**-8888 | OSOS ID: 1 of 0

Gen. Info | Eligibility | Add'l Info | Pgms/PA | **Objective** | Work Hist. | Ed/Lic | Skills | Saved Searches | Activities | Comments | Te

Employment Objective
To secure employment as a retail manager.

Desired O*Net
O*Net Title: 41101100 | First-Line Supervisors of Retail Sales Workers | O*Net Titles
Experience: Year(s) | Month(s)

O*Net Title	Exp. (Months)
<input checked="" type="checkbox"/> First-Line Supervisors of Retail Sales Workers	

 Add a Job Title | Delete Selection | Skills

Desired Employers

Company
<input type="checkbox"/>

 Work Search Plan | Add an Employer | Delete Selection

Acceptable Job Locations
Maximum Zip Radius
 Within 50 miles of ZIP 12061
 Within of ZIP
 Within of ZIP

Or Anywhere in the following states
 Or outside the United States

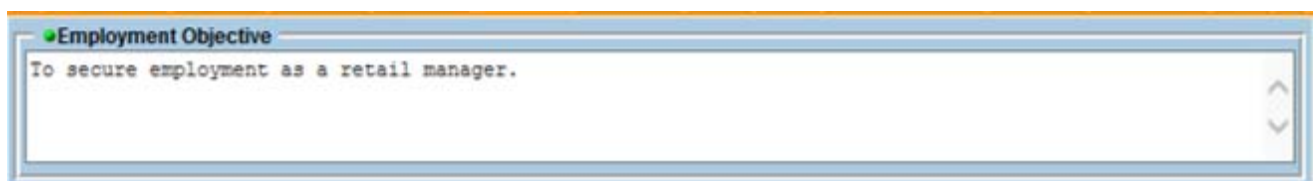
Save | Start Match | Services | Comp Assess | Activity | IA Referrals | Correspond | IVR | Ret to Srch | Comments | Tag | Resume | Sched | Message

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.*

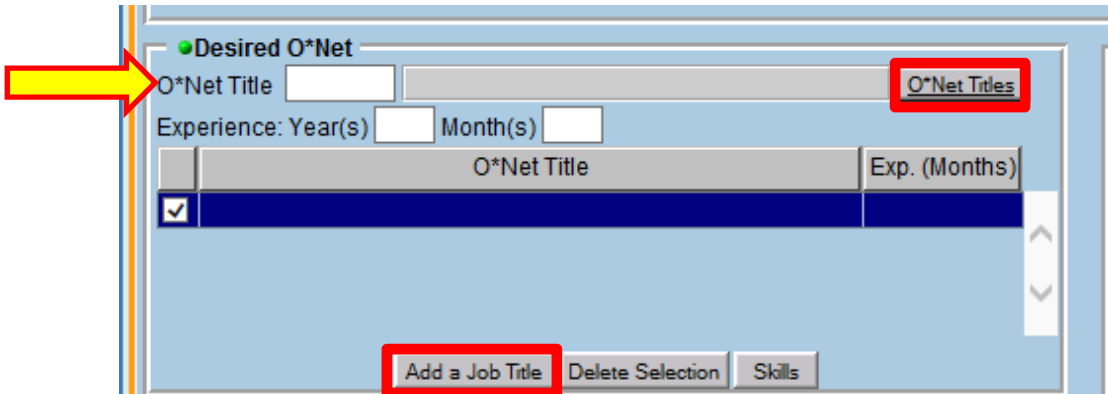
Employment Objective: This field is used to summarize the customer's employment objectives. It should succinctly and strongly emphasize the customer's qualifications and desired position. This field is a maximum of 4000 characters.



Employment Objective
To secure employment as a retail manager.

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.



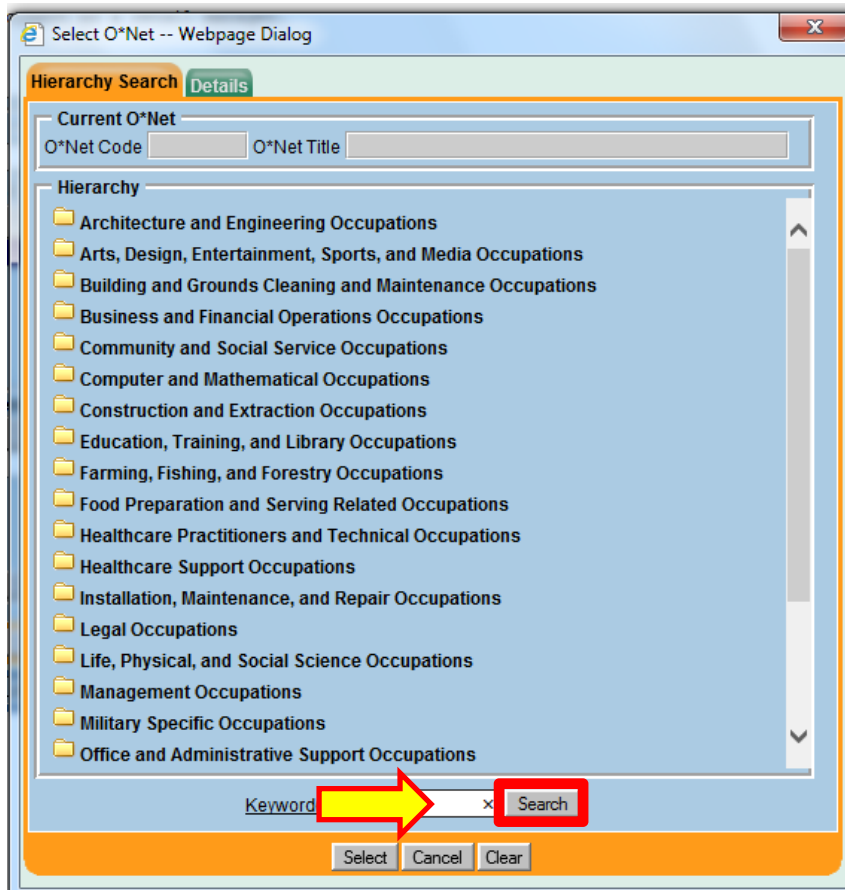
• Desired O*Net

O*Net Title

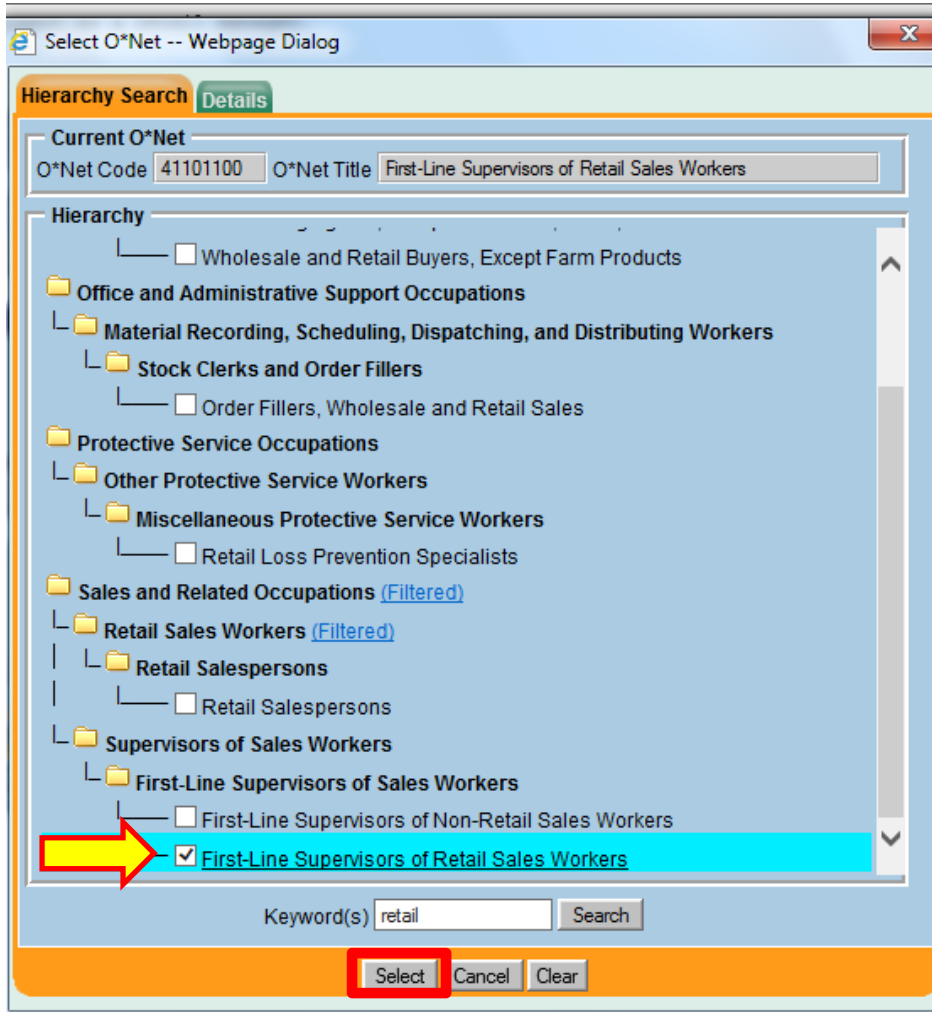
Experience: Year(s) Month(s)

	O*Net Title	Exp. (Months)
<input checked="" type="checkbox"/>		

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**.

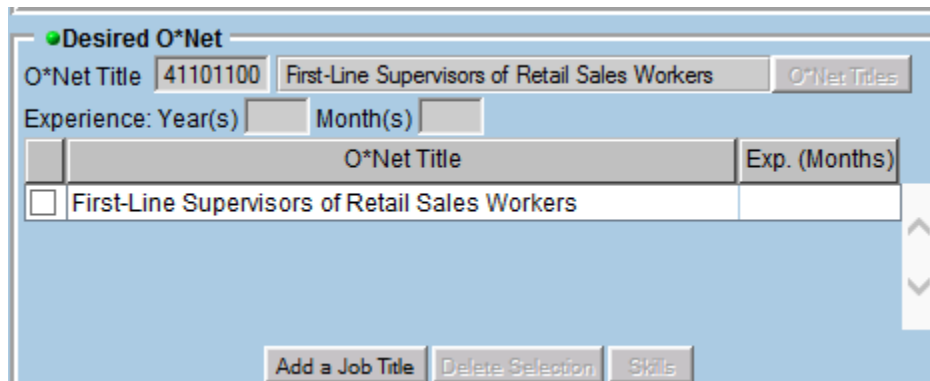


The screenshot shows a web browser window titled "Select O*Net -- Webpage Dialog". It features two tabs: "Hierarchy Search" (active) and "Details". Under "Current O*Net", the "O*Net Code" is 41101100 and the "O*Net Title" is "First-Line Supervisors of Retail Sales Workers". The "Hierarchy" section is a tree view with the following structure:

- Wholesale and Retail Buyers, Except Farm Products
- Office and Administrative Support Occupations
 - Material Recording, Scheduling, Dispatching, and Distributing Workers
 - Stock Clerks and Order Fillers
 - Order Fillers, Wholesale and Retail Sales
- Protective Service Occupations
 - Other Protective Service Workers
 - Miscellaneous Protective Service Workers
 - Retail Loss Prevention Specialists
- Sales and Related Occupations (Filtered)
 - Retail Sales Workers (Filtered)
 - Retail Salespersons
 - Retail Salespersons
 - Supervisors of Sales Workers
 - First-Line Supervisors of Sales Workers
 - First-Line Supervisors of Non-Retail Sales Workers
 - First-Line Supervisors of Retail Sales Workers

At the bottom, there is a "Keyword(s)" field containing "retail" and a "Search" button. Below the hierarchy is a "Select" button (highlighted with a red box), along with "Cancel" and "Clear" buttons.

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



The screenshot shows the "Desired O*Net" tab. It contains the following fields:

- O*Net Title: 41101100 First-Line Supervisors of Retail Sales Workers (with an "O*Net Titles" button to the right)
- Experience: Year(s) [] Month(s) []

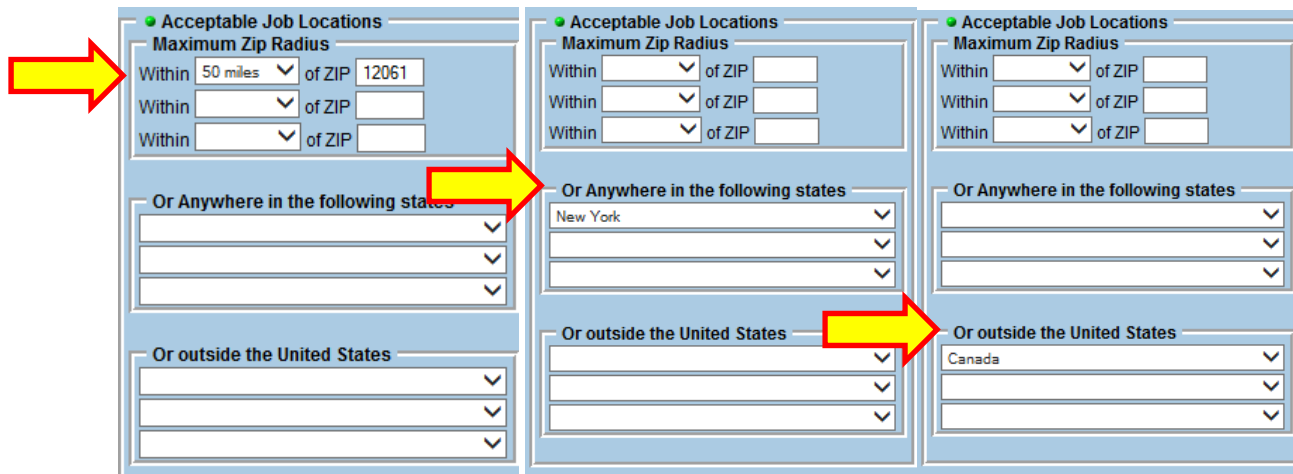
	O*Net Title	Exp. (Months)
<input type="checkbox"/>	First-Line Supervisors of Retail Sales Workers	

At the bottom, there are three buttons: "Add a Job Title", "Delete Selection", and "Skills".

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



The image displays three sequential screenshots of the 'Acceptable Job Locations' form. Each screenshot shows a different selection option highlighted with a red arrow:

- First Screenshot:** The 'Maximum Zip Radius' section is selected. The form shows 'Within 50 miles of ZIP 12061' and two empty 'Within [] of ZIP []' fields. The other two sections are unselected.
- Second Screenshot:** The 'Or Anywhere in the following states' section is selected. The form shows a dropdown menu with 'New York' selected and two empty dropdowns. The other two sections are unselected.
- Third Screenshot:** The 'Or outside the United States' section is selected. The form shows a dropdown menu with 'Canada' selected and two empty dropdowns. The other two sections are unselected.

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

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links JobZone

Parker, John SSN: ***-**-**** OSOS ID: NY015147173 1 of 1

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Detail

Job Title: Retail Sales Manager O*Net Titles O*Net Code: 41101100

Employer: Gadgets Galore Include online Start Date: 06/21/2005 End Date: 03/16/2018

Address: 1 Main Street Supervisor: Phone: Ext.:

City: East Greenbush Wage: \$ 15.00 Hourly Hours/week: 40

State: New York Zip: 12061 Reason for Leaving: Quit

Country: United States Job Duties: Support sales staff through coaching and training. Provide feedback to sales staff

Job Type: Full Time RR Event#: Event

NAICS: NAICS Lookup

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Retail Sales Manager	Gadgets Galore	East Greenbush	06/21/2005	03/16/2018

New Job Entry Delete Selection

Save Start Match Services Comp Assess Activity I.A. Referrals Correspond IVR Ret to Srch Comments Tag Resume Sched Message

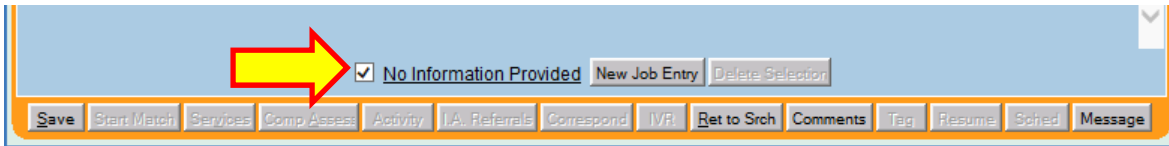
Staff: PALLOZZI, TALIA Office: NY9999 Unsaved Changes Security: Delete 12/06/2018

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

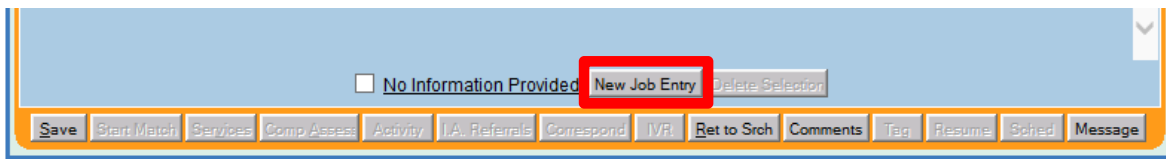


*To complete the Employability Profile, each Job Title in the **Work History** tab must have an associated O*Net Code entered. To find the O*Net Code, click the **O*Net Titles** button. This will bring up a Webpage Dialogue Box where you can select a Job Title using the O*Net Hierarchy or the Search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

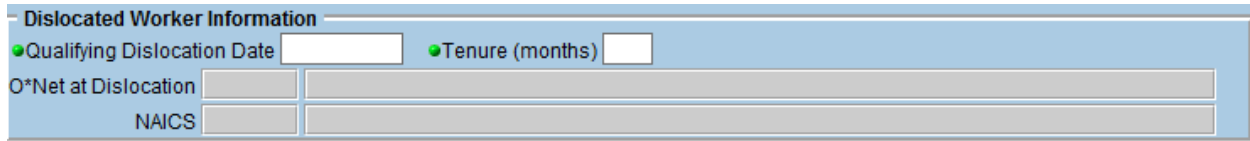
If a customer has no Work History or did not provide information, select **No Information Provided**.



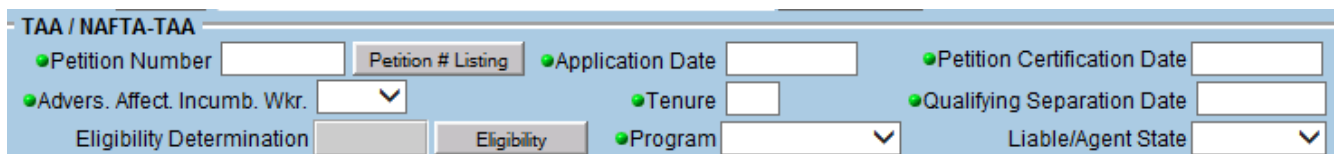
If the customer has more than one Work History, enter each position separately. Start each entry by clicking the **New Job Entry** button.



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

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links JobZone

Parker, John SSN: ***-**-8888 OS ID: NY015147173 1 of 1

<< < Gen. Info Eligibility Add'l Info Pgms/PA Objective Work Hist. Ed/Lic Skills Saved Searches Activities Comments Te > >>

Driver License
 Yes No Class State
 Pass Transport Hazardous Materials Tank Vehicle Motorcycle
 School Bus Doubles/Triples Tank Hazard Air Brakes

Certificates / Licenses

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

 No Information Provided Add Cert/Lic Edit Cert/Lic Delete Selection

Schools

	Course of Study	Degree	Completed	Issuing Institution	State	Country
<input type="checkbox"/>	Business	BA		SUNY Albany	New York	United States

Add School Edit School Delete Selection

Professional Associations

	Association Name	Position	Description	Date Received
<input type="checkbox"/>				

 No Information Provided Add Association Edit Association Delete Selection

Save Start Match Services Comp Assess Activity I.A. Referrals Correspond IVR Ret to Srch Comments Tag Resume Sched Message

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

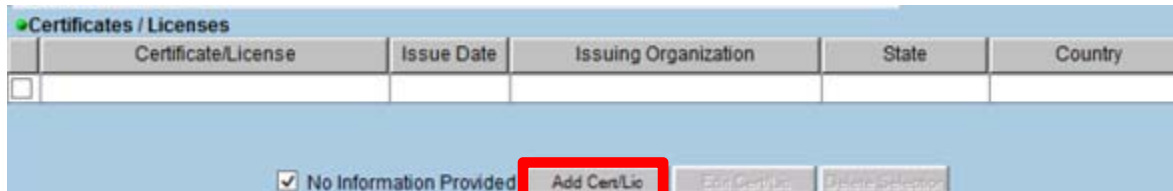


Information entered in these fields helps to create the customer's resume and conduct quality job matching and referrals.

Certificates/Licenses: To enter data, click the **Add Cert/Lic** button.

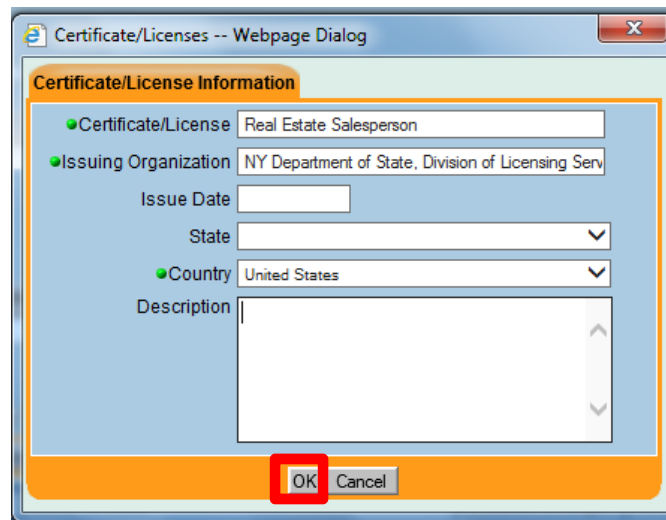
Required fields: Certificate/License, Issuing Organization, and Country.

When data entry is complete, click **OK**. If there is no data to enter, check the box for **No Information Provided**.



Certificates / Licenses					
	Certificate/License	Issue Date	Issuing Organization	State	Country
<input type="checkbox"/>					

No Information Provided **Add Cert/Lic** Edit Cert/Lic Delete Selection



Certificate/Licenses -- Webpage Dialog

Certificate/License Information

- Certificate/License: Real Estate Salesperson
- Issuing Organization: NY Department of State, Division of Licensing Serv
- Issue Date:
- State:
- Country: United States
- Description:

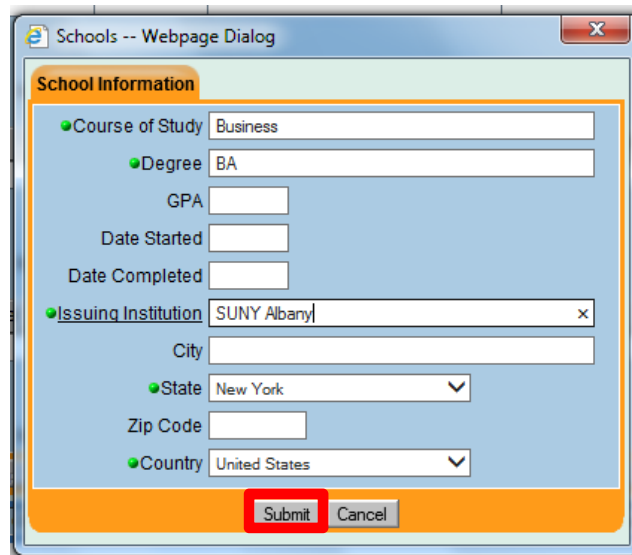
OK Cancel

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**.

● Schools						
	Course of Study	Degree	Completed	Issuing Institution	State	Country
<input type="checkbox"/>	Business	BA		SUNY Albany	New York	United States



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

Professional Associations: Select **Add Association**.

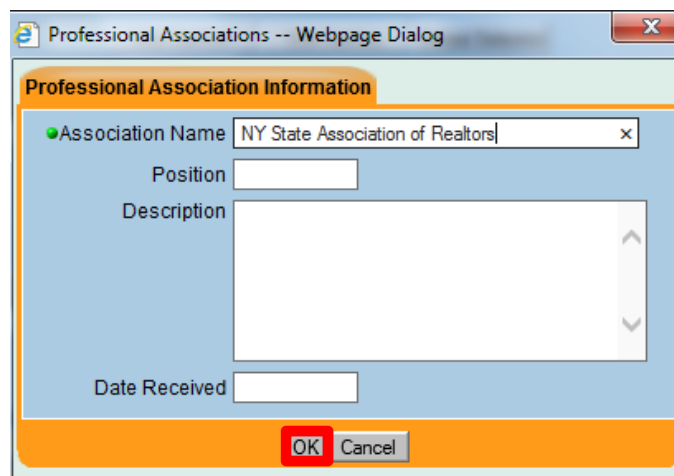
Required field: Association Name.

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



Association Name	Position	Description	Date Received
------------------	----------	-------------	---------------

No Information Provided **Add Association** Edit Association Delete Selection



Professional Association Information

● Association Name NY State Association of Realtors x

Position

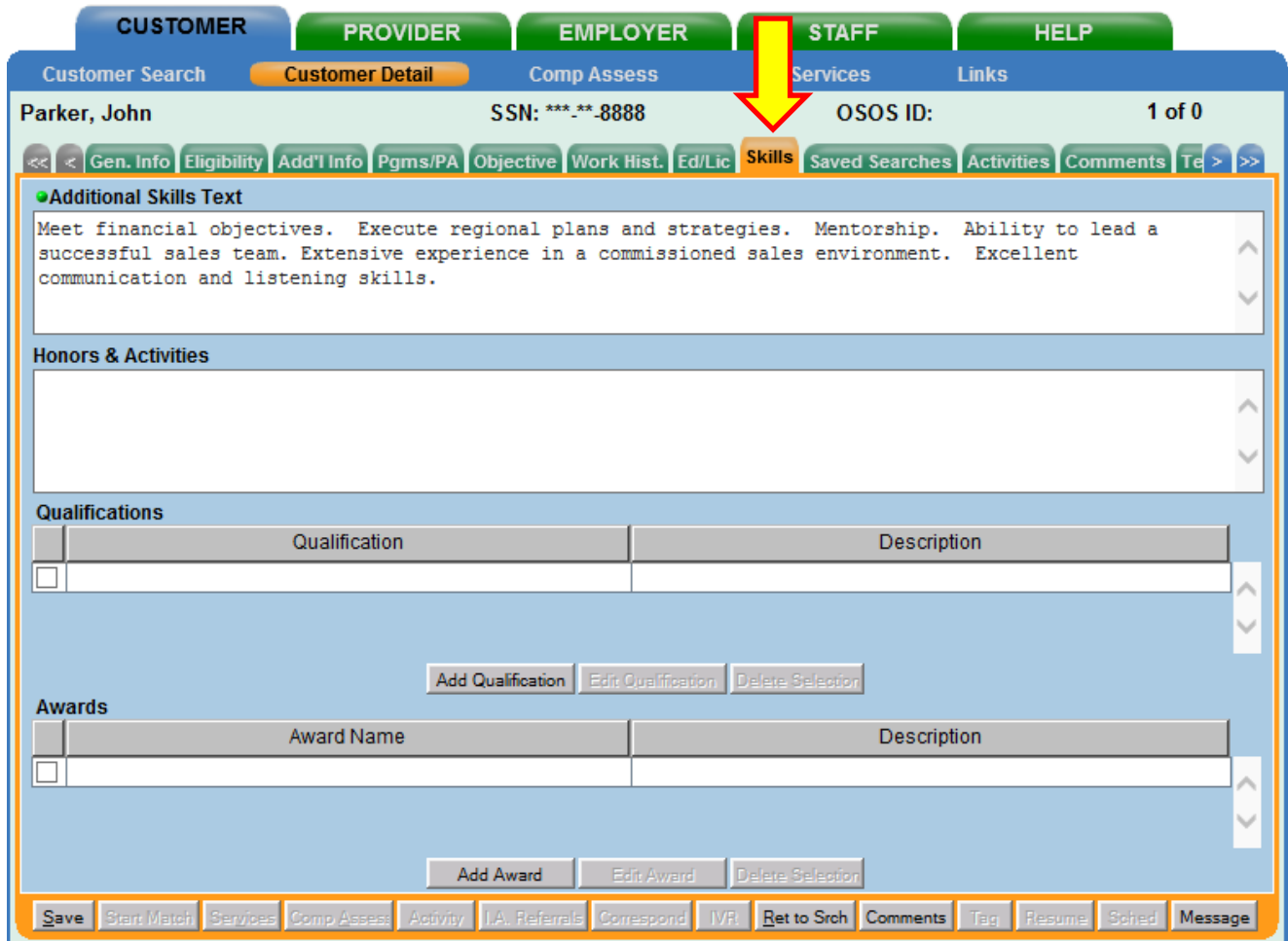
Description

Date Received

OK Cancel

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

SKILLS TAB



Customer Search Customer Detail Comp Assess Services Links

Parker, John SSN: ***-**-8888 OSOS ID: 1 of 0

Gen. Info Eligibility Add'l Info Pgms/PA Objective Work Hist. Ed/Lic Skills Saved Searches Activities Comments Te

Additional Skills Text

Meet financial objectives. Execute regional plans and strategies. Mentorship. Ability to lead a successful sales team. Extensive experience in a commissioned sales environment. Excellent communication and listening skills.

Honors & Activities

Qualifications

Qualification	Description
<input type="checkbox"/>	

Add Qualification Edit Qualification Delete Selection

Awards

Award Name	Description
<input type="checkbox"/>	

Add Award Edit Award Delete Selection

Save Start Match Services Comp Assess Activity I.A. Referrals Correspond IVR Ret to Srch Comments Tag Resume Sched Message

Required Field: Additional Skills Text.

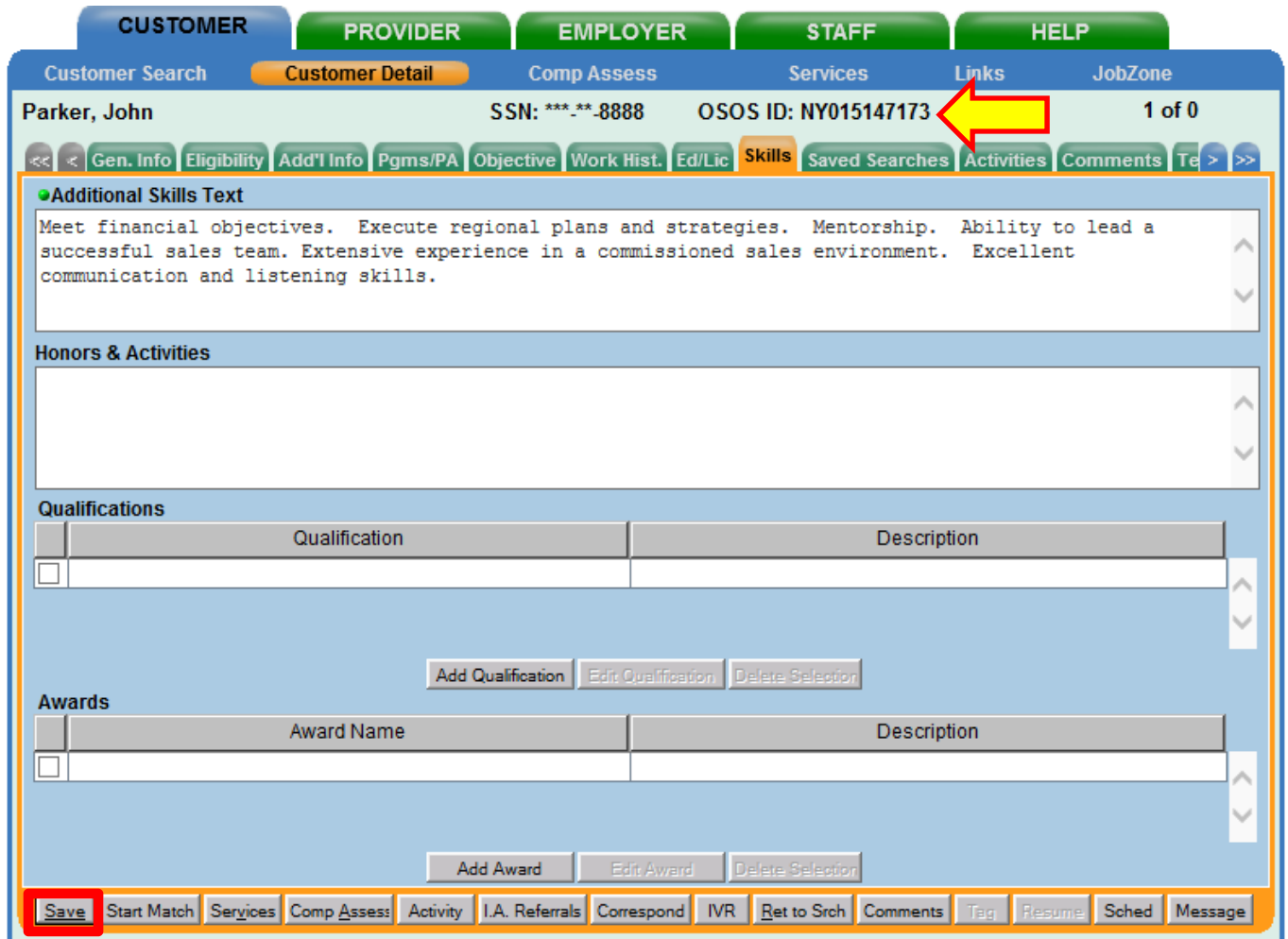
Additional Skills: This field is used to enter any additional skills and abilities that are important in the customer's job performance. Information entered should succinctly and strongly emphasize the customer's skills. This field is a maximum of 4000 characters.



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.



Customer Search | **Customer Detail** | Comp Assess | Services | Links | JobZone

Parker, John | SSN: ***-**-8888 | OSOS ID: NY015147173 | 1 of 0

Gen. Info | Eligibility | Add'l Info | Pgms/PA | Objective | Work Hist. | Ed/Lic | **Skills** | Saved Searches | Activities | Comments | Te | >>

Additional Skills Text
 Meet financial objectives. Execute regional plans and strategies. Mentorship. Ability to lead a successful sales team. Extensive experience in a commissioned sales environment. Excellent communication and listening skills.

Honors & Activities

Qualifications

<input type="checkbox"/>	Qualification	Description
<input type="checkbox"/>		

Add Qualification | Edit Qualification | Delete Selection

Awards

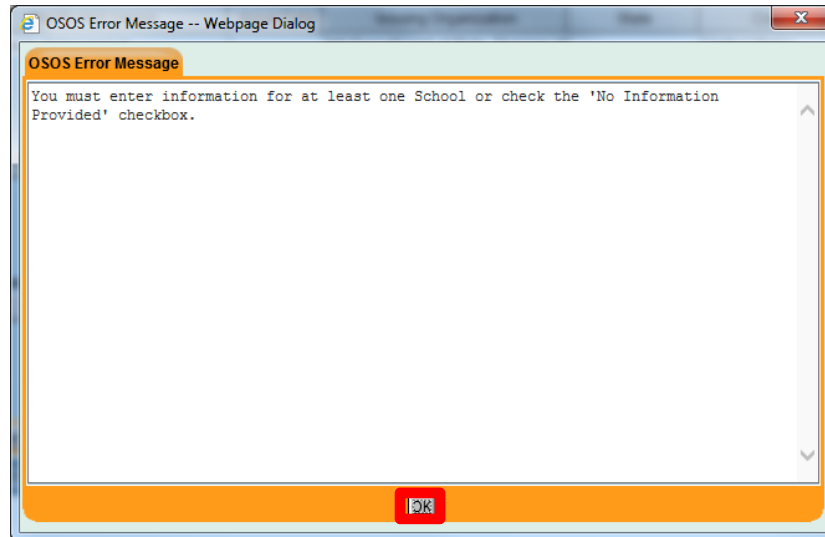
<input type="checkbox"/>	Award Name	Description
<input type="checkbox"/>		

Add Award | Edit Award | Delete Selection

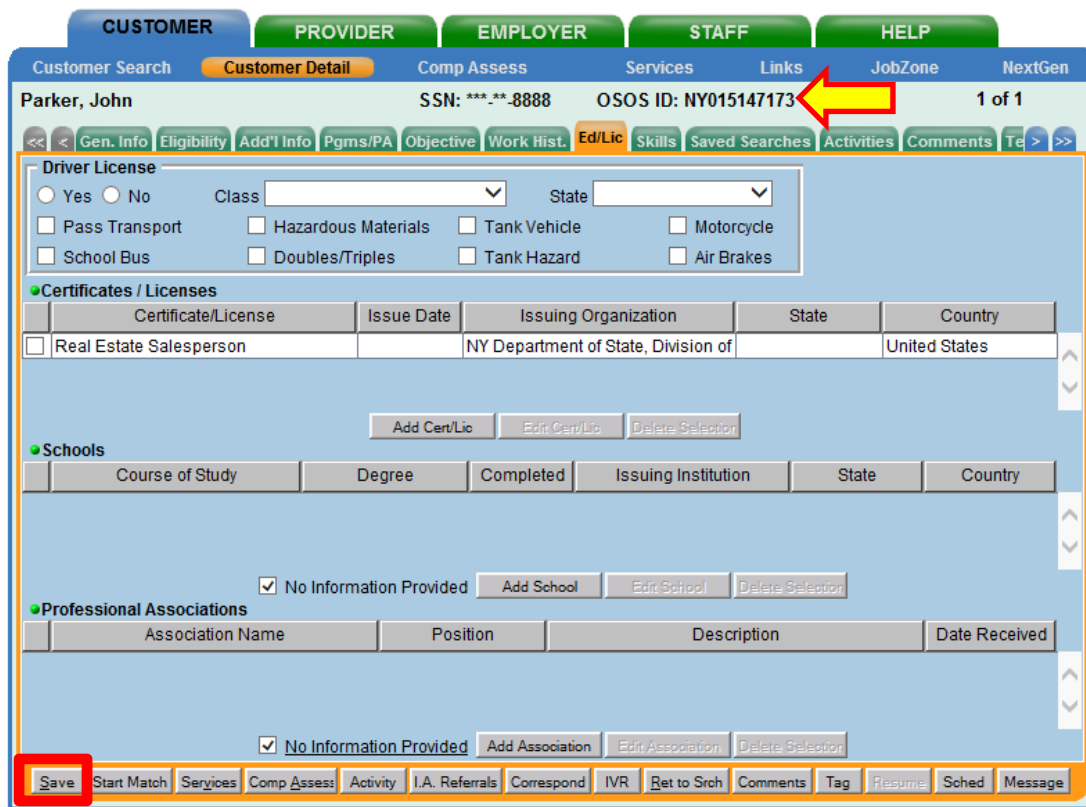
Save | Start Match | Services | Comp Assess | Activity | I.A. Referrals | Correspond | IVR | Ret to Srch | Comments | Tag | Resume | Sched | Message



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