

WIF-BEAM OSOS Guide



Contents

Purpose	2
OSOS Data Entry.....	3
WIF-BEAM L1 services (Activities)	3
Full List of WIF-BEAM Activities	4
WIF-BEAM L2 services.....	6
Classroom Training.....	6
Funding the Service.....	11
WIF-BEAM Specific L2 Services	13
WIF-BEAM Outreach Coordinators include:	13
WIF-BEAM TAB.....	14
Resources and Assistance	16



PURPOSE

The Workforce Innovation Fund - Bridge to Employment and Academic Marketplace (**WIF-BEAM**) grant will help young economically disadvantaged college dropouts bridge the gap between workforce and education using community outreach and online tutoring.

Participants must be between the ages of 19 and 30 years who have attempted any post-secondary training program beyond high school and were not successful (stop outs). Training programs must lead to high growth sector technical jobs. The grant is approved from October 1, 2014 through September 30, 2019.

The grant has been awarded to 11 offices within 4 LWIBs:

- Broome-Tioga (Binghamton and Owego)
- Chenango-Delaware-Otsego (Delhi, Norwich, Oneonta, and Sidney)
- Herkimer-Madison-Oneida (Herkimer, Utica, Rome and Wampsville)
- Tompkins (Ithaca)

WIF-BEAM uses WIA/WIOA Funds.

WIF-BEAM services will be entered into OSOS as an L1 Activity or L2 service. All **Activity Names** begin with the abbreviation: **WIF-BEAM**.

A **WIF-BEAM** program has been established for all L2 services.

WIF-BEAM participation will create or extend a WIA/WIOA enrollment and functionally align with the LEX and Common Measure enrollments.

All participant records will be subject to Customer Service Indicator (CSI) goals.

Classroom training is not required to be listed in the **ETPL** and is listed as **ITA Training**.

Allow the enrollments to soft exit after 90 days without any active service. Hard exits are not allowed.

Program details must be recorded in the dedicated **WIF-BEAM** program tab within the OSOS **Customer Detail** window.



Veronica Miller of the Herkimer-Madison-Oneida LWIB is the lead contact with this grant. Any requests to add provider services, offerings or drop down menu items in the WIF-BEAM tab must be approved by Ms. Miller.

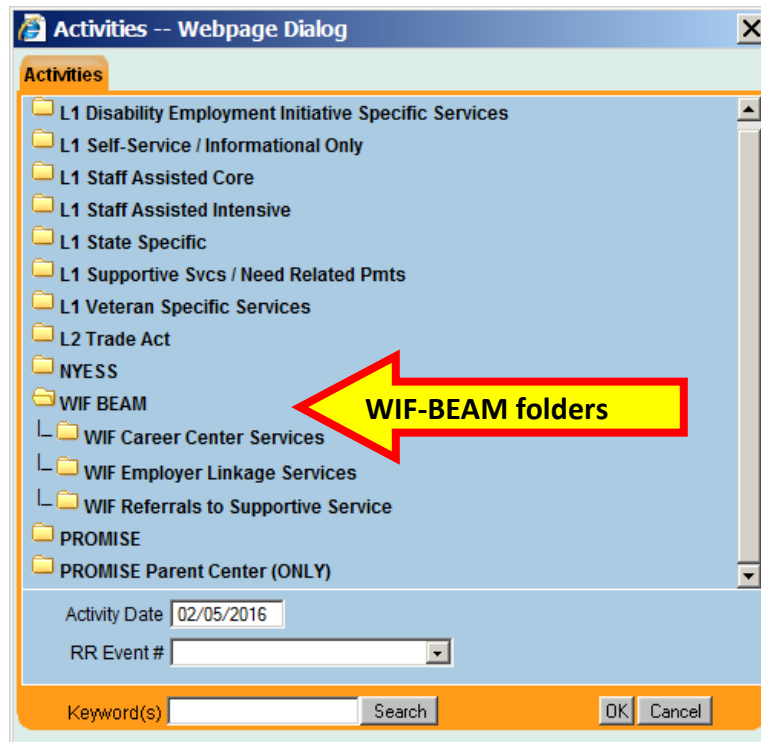
(315) 798-5537

vmiller@working-solutions.org

OSOS DATA ENTRY

WIF-BEAM L1 SERVICES (ACTIVITIES)

There are numerous WIF-BEAM L1 activities available in OSOS. To locate these activities, click the **Activity** button at the bottom of the page to bring up the **Activities - - Webpage Dialog** screen. Click the **WIF-BEAM** folder and then check the desired activity.



Some WIF-BEAM activities will create LEX, WIA/WIOA, and Common Measures enrollment while others will not.

The activities that create enrollments are marked with "[LX, WIA Enrolling]". The activities that do not create enrollments are used as "**markers**" to provide useful information regarding the program and its participants.

FULL LIST OF WIF-BEAM ACTIVITIES

Activities -- Webpage Dialog

Activities

- WIF BEAM
 - WIF Career Center Services
 - WIF 1st semester weekly participant contact
 - WIF Academic Counseling [LX, WIA Enrolling]
 - WIF Academic Enrollment Assistance [LX, WIA Enrolling]
 - WIF Assessment Conducted [LX, WIA Enrolling]
 - WIF Bi-weekly Participant Follow-Up Contact
 - WIF Career Counseling by Career Center [LX, WIA Enrolling]
 - WIF Career Guidance and Planning [LX, WIA Enrolling]
 - WIF Case Management Service [LX, WIA Enrolling]
 - WIF Completed Online Tutoring Module
 - WIF Entrance Exam Review Class Guide and Resources [LX, WIA Enrolling]
 - WIF Financial Aid Support or Counseling [LX, WIA Enrolling]
 - WIF IAP Created [LX, WIA Enrolling]
 - WIF IAP Revised [LX, WIA Enrolling]
 - WIF JobZone Assessment
 - WIF JobZone Orientation
 - WIF Orientation To Online Student Portal and Instructional Tools
 - WIF Participant Applied to an Educational or Training Program
 - WIF Participant is Accepted into an Education or Training Program
 - WIF Provided Entrance Exam Guide and Preparation Resources [LX Enrolling]
 - WIF TABE Test Administration [LX, WIA Enrolling]
 - WIF Employer Linkage Services
 - WIF Apprenticeship Opportunities Discussed/Scheduled [LX, WIA Enrolling]
 - WIF Internship Opportunities Discussed/Scheduled [LX, WIA Enrolling]
 - WIF Participant Attended Employer Presentation on Careers
 - WIF Participant Toured Job Site
 - WIF Referrals to Supportive Service
 - WIF Orientation to College/Educational Support Staff on Campus
 - WIF Referral for Academic Tutoring [LX, WIA Enrolling]
 - WIF Referral for Basic Skills Tutoring [LX, WIA Enrolling]
 - WIF Referral for TABE Testing [LX, WIA Enrolling]
 - WIF Referral to BOCES for Remedial Education Support [LX, WIA Enrolling]
 - WIF Referral to CBO for Remedial Education Support [LX, WIA Enrolling]
 - WIF Referral to Community Based Group Workshop or Information Session [LX, WIA Enrolling]
 - WIF Referral to Community Based Support Services [LX, WIA Enrolling]
 - WIF Referral to Educational Institution or Partner for Academic Counseling [LX, WIA Enrolling]
 - WIF Referral to EOC for Remedial Education Support [LX, WIA Enrolling]
 - WIF Referral to Partner for Career Counseling [LX, WIA Enrolling]
 - WIF Referral-Educ Institution or Partner for Financial Aid Support or Counseling [LX, WIA Enrolling]
- PROMISE
 - Activity Date
 - RR Event #
 - Keyword(s)



If it is the first enrolling service, then the **Verification -- Webpage Dialog** screen will pop up.

Review the information and enter any necessary corrections in this screen. All corrections entered will automatically populate the corresponding data fields elsewhere in OSOS.

Click the **OK** button when done.

The screenshot shows a software window titled "Verification -- Webpage Dialog" with a close button (X) in the top right corner. The window has two tabs: "Customer Detail" (selected) and "Comp Assess".

General Information

- Education Level: Bachelors or equivalent
- School Status: In-school, Post-H.S.
- Employment Status: Not Employed
- UI Claimant: [Empty]
- Profiled: [Empty] Profiled Date: [Empty]

Programs & Public Assistance

- TANF: Yes [03/11/2014]
- GA: [Empty]
- RCA: [Empty]
- SSI: Yes [03/11/2014]
- Food Stamps: Yes [12/12/2008]
- SSDI: Yes [03/11/2014]
- Dislocated Worker: [Empty]
- Displaced Homemaker: [Empty]
- Other WIA Programs: [Empty]

Income & Disability Status

- Lower Living Standard: Yes [Income 70% LLSIL N/A]
- Local Priority: N/A
- Disability Status: Not Disabled

Migrant

- Migrant / Seasonal Wkr: Yes No

Military Service

- Service Veteran: No

Selective Service

- Selective Service:

Work History

- Reason for Leaving: Retired

At the bottom of the window are "OK" and "Cancel" buttons.



WIF-BEAM L2 SERVICES

A **WIF-BEAM** Participant may already be actively enrolled and receiving WIA/WIOA services.

All **WIF-BEAM** training services must be entered into OSOS as L2 services.

Services will be tracked by the office in which the user has logged in.

CLASSROOM TRAINING

Click the **New Service** button within the **Services** tab.

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

Malinak, Zippy SSN: OSOS ID: NY005719389

<< < Agency Info Achievement Objectives **Services** > >>

Detail

Service Name
Service Desc.
Service ID
Service Type
Provider Name
Location Name
Provider ID Offering ID
Plan. Start Date Plan. End Date
Actual Start Date Actual End Date
Completed Successfully
Next Contact Date
Program Service Type
Part Time Learn. Distance Learn.

Funding

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>				

Total Funding Add Edit Delete
Petition #
RR Event #

Achievement Objective Service

New Service **New Service** Save Customer Detail Comp Assess Comments Check Labor Market Information

OSOS will navigate to the **Quick Search** tab in the Offering Search window. If you know the Offering ID #, then enter it here. Otherwise, select the **General Info** tab.



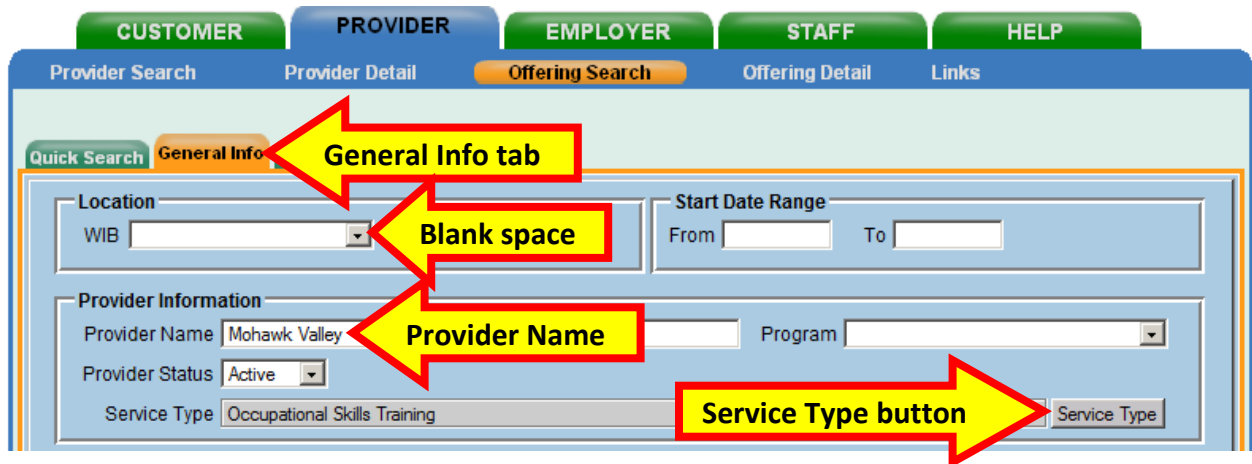
CUSTOMER PROVIDER EMPLOYER STAFF HELP

Provider Search Provider Detail **Offering Search**

Quick Search **General Info**

Offering ID # ID 1

Enter the beginning of the **Provider Name**.



CUSTOMER PROVIDER EMPLOYER STAFF HELP

Provider Search Provider Detail **Offering Search** Offering Detail Links

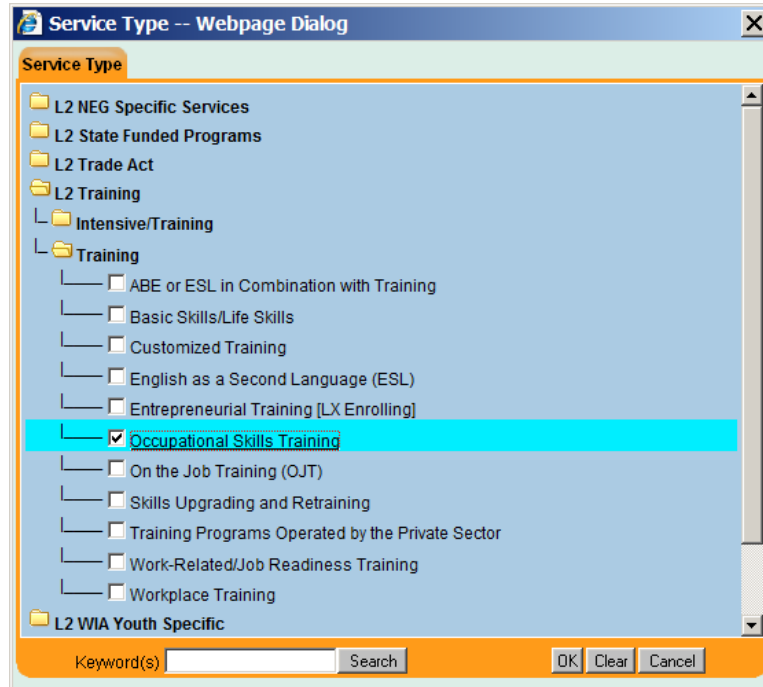
Quick Search **General Info**

Location WIB Start Date Range From To

Provider Information
Provider Name Mohawk Valley Program
Provider Status Active
Service Type Occupational Skills Training **Service Type** Service Type

If **Service Type** is known, click the **Service Type** button and select the appropriate type.

Click the **OK** button to return to the **Offering Search** screen.



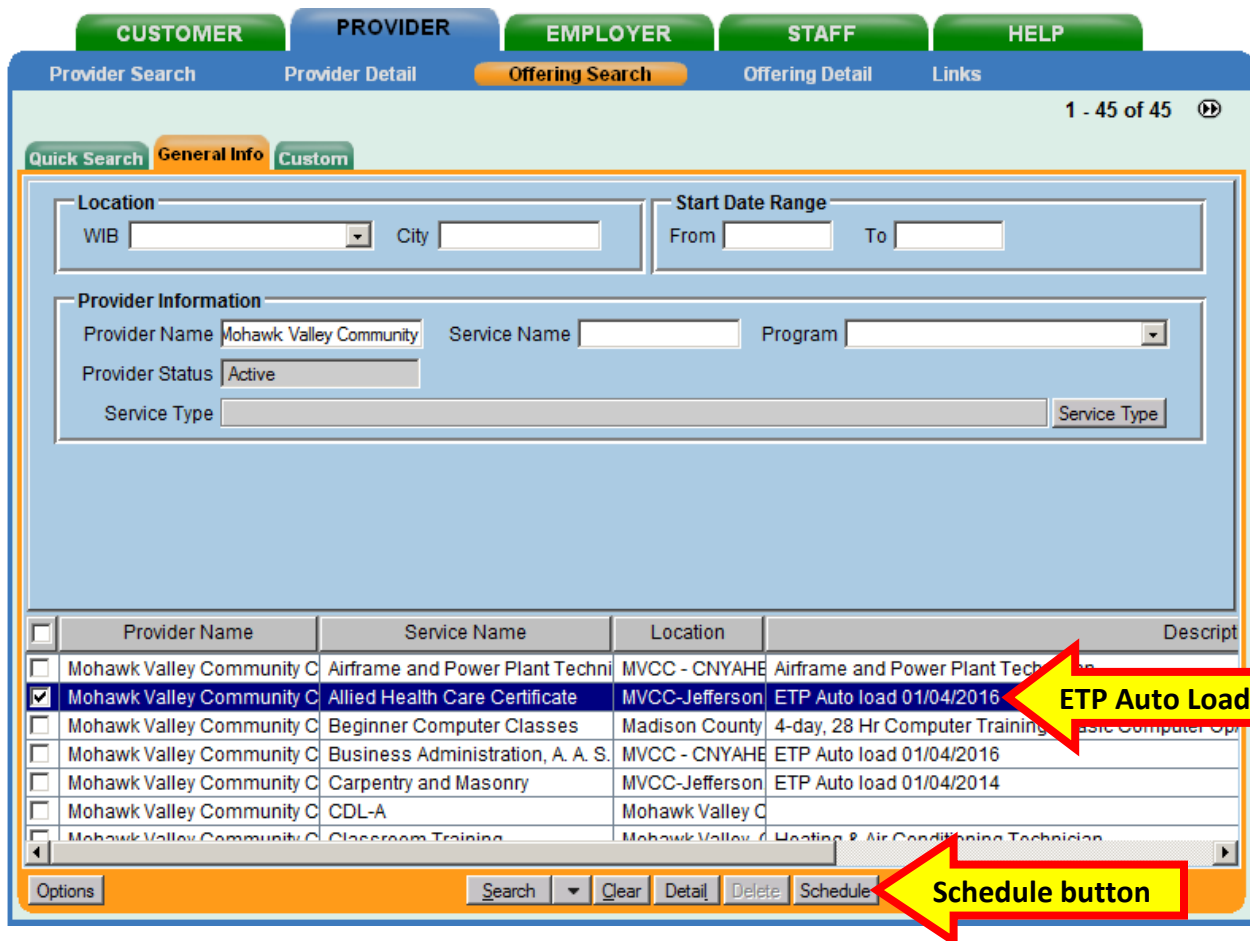
Click the **Search** button at the bottom of the **Offering Search** screen.



All classroom training must be Eligible Training Provider List (ETPL) approved for WIA/WIOA funding and indicate auto loaded entry into OSOS.

Check the box to select the service. If unsure which service is appropriate, click the checkbox for an individual service and then click the **Detail** button.

Once the appropriate service has been identified and selected, click the **Schedule** button.



Provider Search Provider Detail **Offering Search** Offering Detail Links

1 - 45 of 45

Quick Search **General Info** Custom

Location: WIB City: Start Date Range: From: To:

Provider Information:

Provider Name: Mohawk Valley Community Service Name: Program:

Provider Status: Active Service Type: Service Type:

<input type="checkbox"/>	Provider Name	Service Name	Location	Descript
<input type="checkbox"/>	Mohawk Valley Community C	Airframe and Power Plant Techni	MVCC - CNYAHE	Airframe and Power Plant Techni
<input checked="" type="checkbox"/>	Mohawk Valley Community C	Allied Health Care Certificate	MVCC-Jefferson	ETP Auto load 01/04/2016
<input type="checkbox"/>	Mohawk Valley Community C	Beginner Computer Classes	Madison County	4-day, 28 Hr Computer Training Basic Computer Op
<input type="checkbox"/>	Mohawk Valley Community C	Business Administration, A. A. S.	MVCC - CNYAHE	ETP Auto load 01/04/2016
<input type="checkbox"/>	Mohawk Valley Community C	Carpentry and Masonry	MVCC-Jefferson	ETP Auto load 01/04/2014
<input type="checkbox"/>	Mohawk Valley Community C	CDL-A	Mohawk Valley C	
<input type="checkbox"/>	Mohawk Valley Community C	Classroom Training	Mohawk Valley C	Heating & Air Conditioning Technician

Options Search Clear Detail Delete Schedule

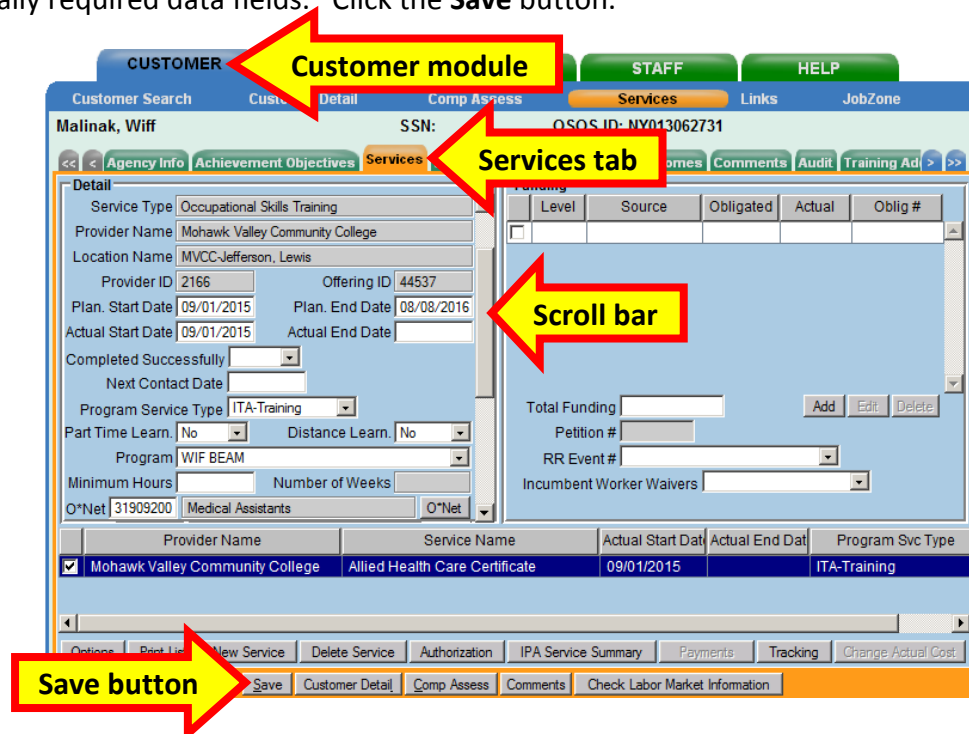
OSOS will navigate back to the **Services** tab in the **Customer** module.

Complete the required fields in the **Detail** section of the tab.

Each service added in OSOS must include:

- **Plan. Start Date:** Enter the planned started date when the service is expected to start in the format of mm/dd/yyyy
- **Plan. End Date:** Enter the date the service is expected to end or a date that is 90 days from the planned or actual start date. This will cause a message to be sent to the user's staff Inbox indicating that service may need to be closed
- **Actual Start Date:** Enter the date the service begins. This cannot be a future date
- **Next Contact Date:** Enter a date to follow up with the participant and verify the **WIF-BEAM** program status. This date should be less than 90 days in the future
- **Program Service Type:** Select the program service type corresponding to the service. All **WIF-BEAM** classroom training is **ITA-Training**.
- **Part Time Learning** and **Distance Learning**
- **Program:** Click on the drop down menu and select **WIF-BEAM**
- **O*Net:** Click the **O*Net** button to access the **O*Net Webpage Dialog** search. Select the appropriate **O*Net title**. More information is available in the [O*Net Titles in OSOS Guide](#)

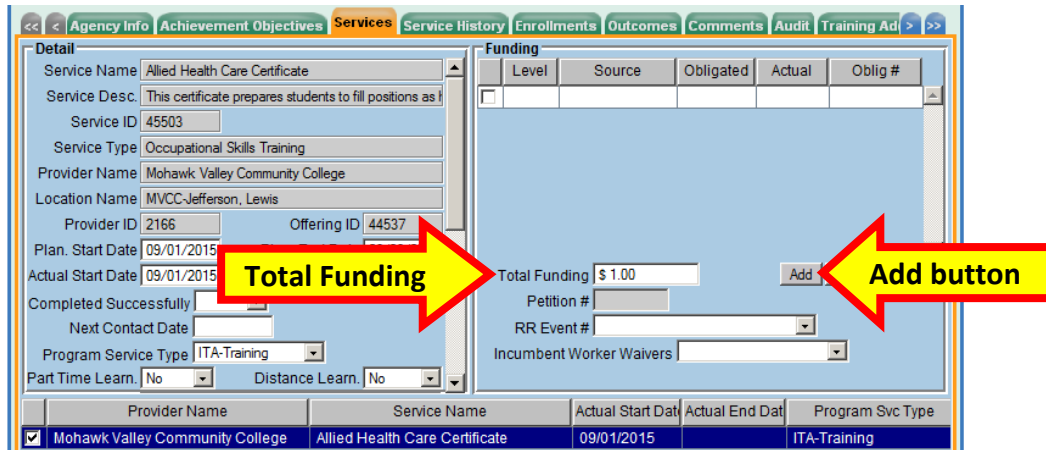
It will be necessary to use the scroll bar at the right hand side of the **Detail** section to access additionally required data fields. Click the **Save** button.



FUNDING THE SERVICE

Once the **Service Detail** section has been saved, the funding may be added.

Enter the number **1** into the **Total Funding** data field and click the **Add** button.



Total Funding → Total Funding \$ 1.00 → **Add button**

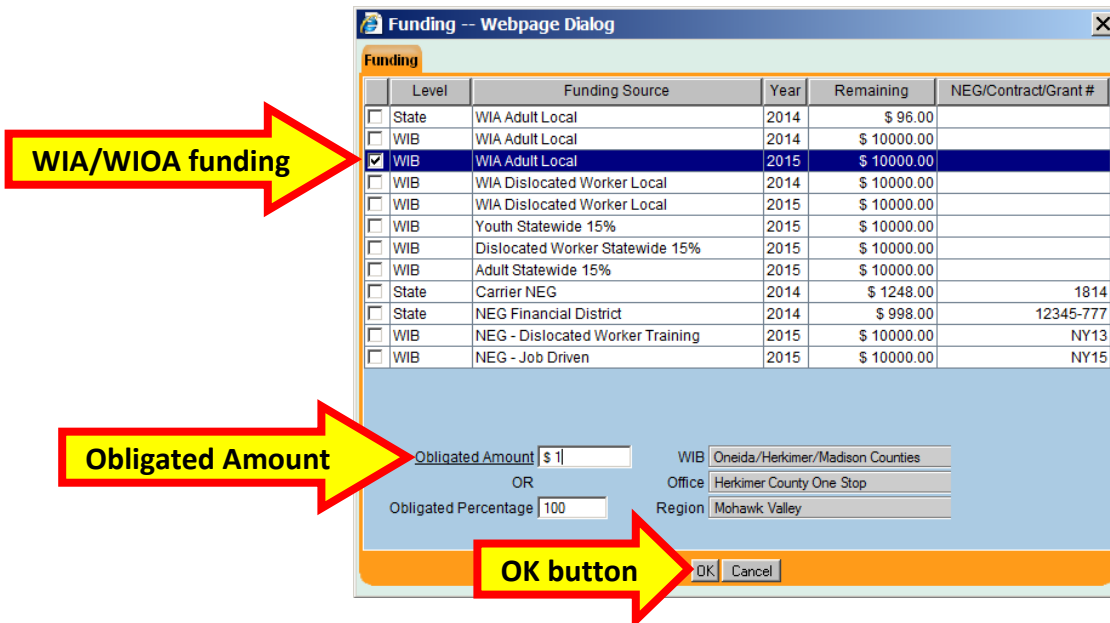
Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/> Mohawk Valley Community College	Allied Health Care Certificate	09/01/2015		ITA-Training

The **Funding -- Webpage Dialog** screen will appear. Select the appropriate WIA/WIOA funding.

Do not select Youth Funding for WIF-BEAM participant services, even if the participants are current youth customers.

Enter the number **1** into the **Obligated Amount** data field.

Click the **OK** button.



WIA/WIOA funding →

Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	State WIA Adult Local	2014	\$ 96.00	
<input type="checkbox"/>	WIB WIA Adult Local	2014	\$ 10000.00	
<input checked="" type="checkbox"/>	WIB WIA Adult Local	2015	\$ 10000.00	
<input type="checkbox"/>	WIB WIA Dislocated Worker Local	2014	\$ 10000.00	
<input type="checkbox"/>	WIB WIA Dislocated Worker Local	2015	\$ 10000.00	
<input type="checkbox"/>	WIB Youth Statewide 15%	2015	\$ 10000.00	
<input type="checkbox"/>	WIB Dislocated Worker Statewide 15%	2015	\$ 10000.00	
<input type="checkbox"/>	WIB Adult Statewide 15%	2015	\$ 10000.00	
<input type="checkbox"/>	State Carrier NEG	2014	\$ 1248.00	1814
<input type="checkbox"/>	State NEG Financial District	2014	\$ 998.00	12345-777
<input type="checkbox"/>	WIB NEG - Dislocated Worker Training	2015	\$ 10000.00	NY13
<input type="checkbox"/>	WIB NEG - Job Driven	2015	\$ 10000.00	NY15

Obligated Amount → Obligated Amount \$ 1

Obligated Percentage 100

WIB Oneida/Herkimer/Madison Counties

Office Herkimer County One Stop

Region Mohawk Valley

OK button → OK Cancel



OSOS will automatically navigate back to the **Service** tab and the **WIF-BEAM** service.

Click the **Save** button.

The screenshot displays the OSOS interface for a customer named Malinak, Wiff. The 'Services' tab is selected and highlighted with a red arrow labeled 'Service tab'. The interface shows a 'Detail' section with various fields for service information, including Service Name, Service Desc, Service ID, Service Type, Provider Name, Location Name, Provider ID, Offering ID, Plan. Start Date, Plan. End Date, Actual Start Date, and Actual End Date. A 'Funding' table is also visible, showing a single row with Level 'WIB', Source 'WIA Adult Local', Obligated '\$ 1.00', and Actual '\$ 0.00'. Below the funding table, there are fields for Total Funding, Petition #, RR Event #, and Incumbent Worker Waivers. At the bottom of the interface, a 'Save button' is highlighted with a red arrow.

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>	WIB	WIA Adult Local	\$ 1.00	\$ 0.00

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/> Mohawk Valley Community College	Allied Health Care Certificate	09/01/2015		ITA-Training



WIF-BEAM SPECIFIC L2 SERVICES

There are four WIF-BEAM services that may require special attention and creation:

1. Academic Tutoring (Service Type: Academic Learning)
2. Basic Skills Tutoring (Service Type: Academic Learning)
3. Internship (Service Type: Work-Related/Job Readiness Training)
4. Job Shadowing (Service Type: Work-Related/Job Readiness Training)

The L2 service assists in recording valuable information such as the purpose: start date & end date of the service; the provider or employer involved; and if the service was successfully completed.



Do not data enter, add or change any provider service or offering to the WIF-BEAM program. Any data entry for these four services must be submitted to the Outreach Coordinator and approved by Veronica Miller for consideration. The OSOS Help Desk will be available to assist the coordinators in entering these services.

WIF-BEAM OUTREACH COORDINATORS INCLUDE:

Broome/Tioga:

Binghamton and Owego

Cory Rusin

crusin@working-solutions.org

CDO:

Delhi, Norwich, Oneonta and Sidney

Alan Sessions

cdoworkforce@gmail.com

HMO:

Rome, Herkimer, and Wampsville

Kristi Edick

kedick@working-solutions.org

HMO:

Utica

Anny Guererro

aguerrero@working-solutions.org

Tompkins:

Ithaca

Sarah Bonawitz

sarahbonawitzbeam@gmail.com

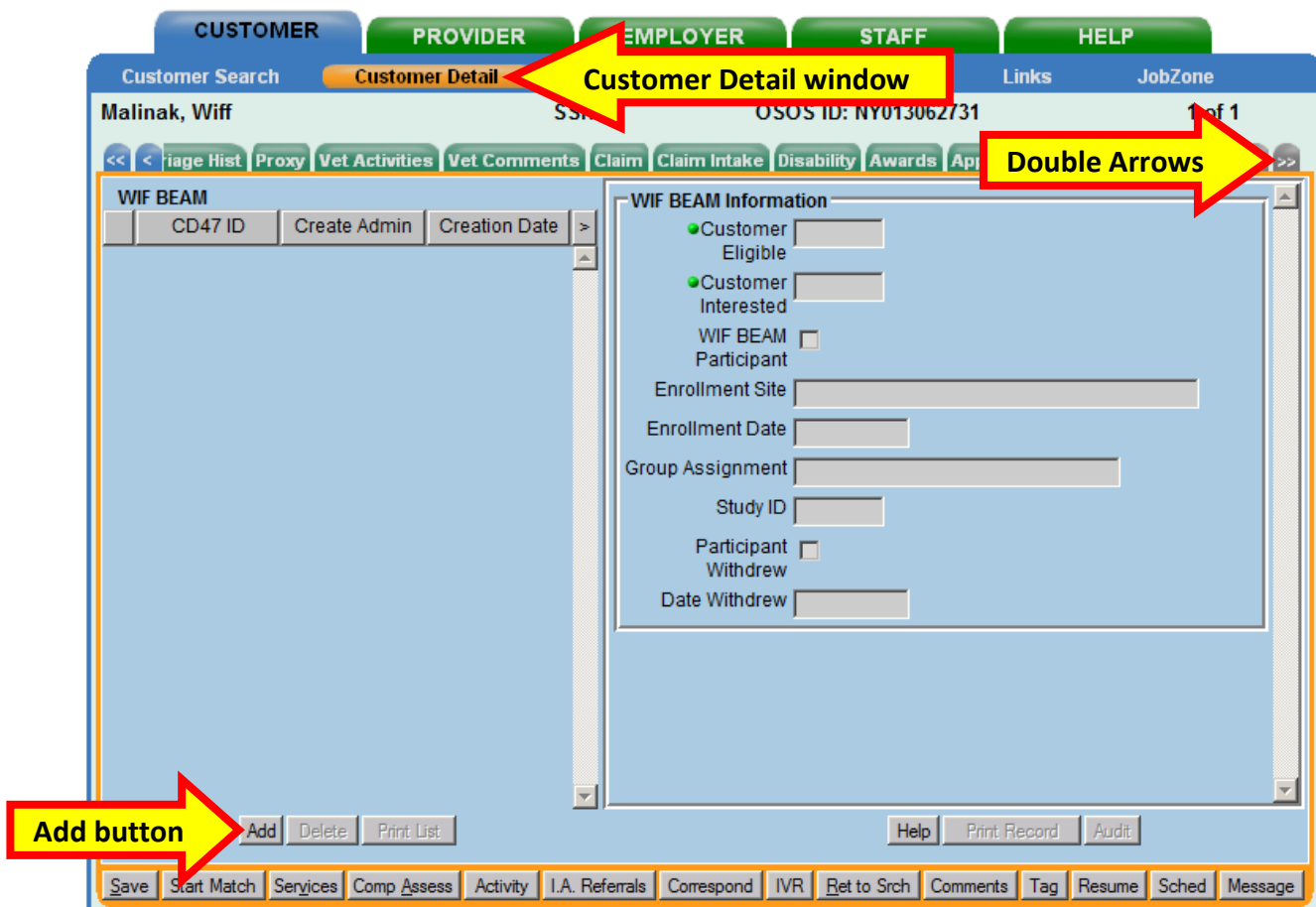
WIF-BEAM TAB

The **WIF_BEAM** tab is located at the extreme right hand side of the tabs within the **Customer Detail** window. It will be necessary to click on the double arrow to navigate to the tab.



The custom tab is only visible when the user is signed in to their primary office.

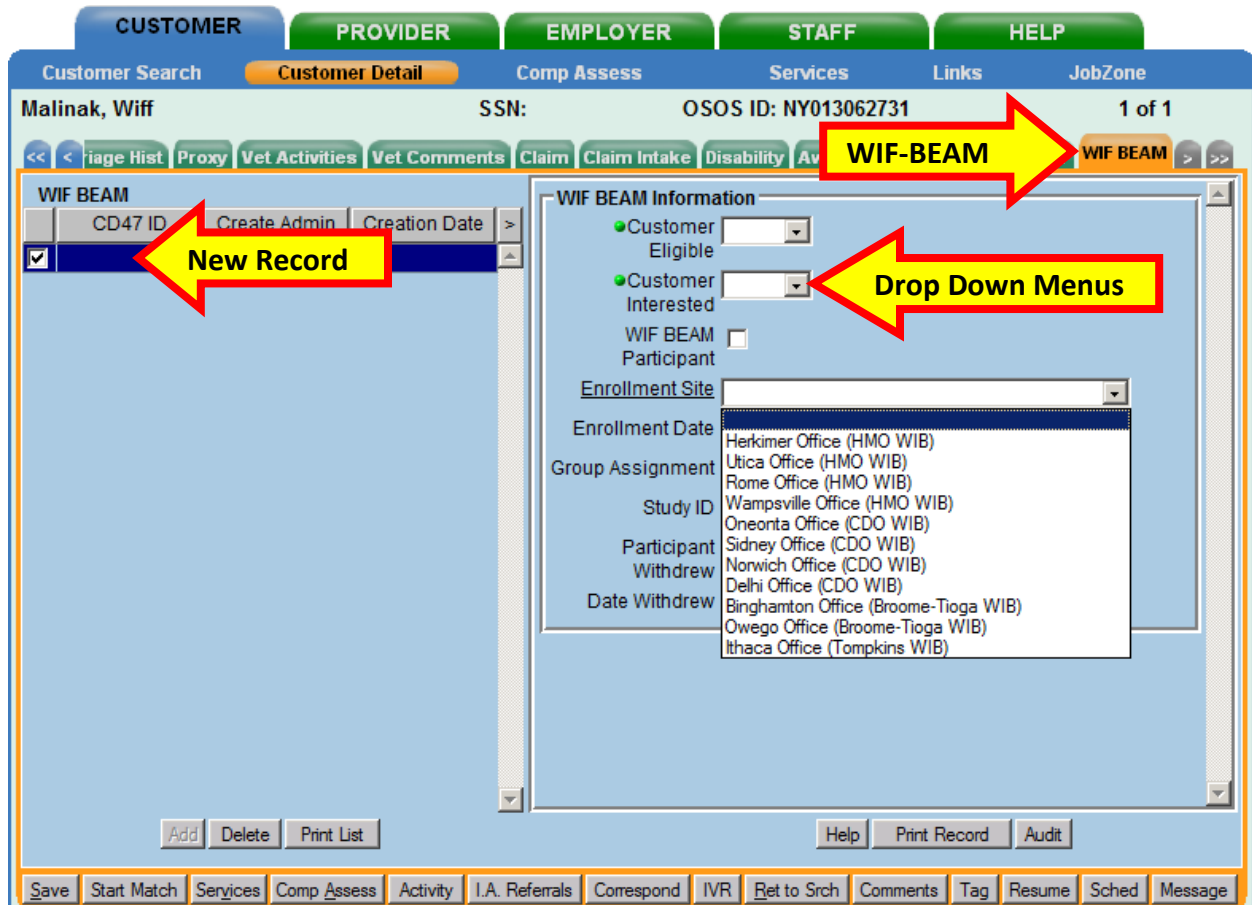
To create a new record, click the **Add** button.



The screenshot displays the OSOS Customer Detail window for 'Malinak, Wiff'. The window has a top navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with tabs for Customer Search, Customer Detail (highlighted), Links, and JobZone. The main content area is divided into two panes. The left pane is titled 'WIF BEAM' and contains a table with columns for CD47 ID, Create Admin, and Creation Date. The right pane is titled 'WIF BEAM Information' and contains several form fields: Customer Eligible (checked), Customer Interested (checked), WIF BEAM Participant (unchecked), Enrollment Site, Enrollment Date, Group Assignment, Study ID, Participant Withdrew (unchecked), and Date Withdrew. At the bottom of the window, there is a toolbar with buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message. A red arrow points to the 'Add' button in the toolbar. Another red arrow points to the 'Customer Detail' tab in the sub-navigation bar. A third red arrow points to the double arrow icon at the end of the sub-navigation bar, which is used to navigate to the WIF BEAM tab.

If a record already exists, then place a check next to the record to access the fields.

The various **WIF BEAM Information** data fields to the right will become accessible once a record is added or selected.



The screenshot displays the OSOS interface for WIF-BEAM. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail (selected), Comp Assess, Services, Links, and JobZone. The main header shows 'Malinak, Wiff', 'SSN:', 'OSOS ID: NY013062731', and '1 of 1'. A secondary navigation bar includes: <<, <, Image Hist, Proxy, Vet Activities, Vet Comments, Claim, Claim Intake, Disability, Av, WIF-BEAM (highlighted with a yellow arrow and 'WIF-BEAM' label), and >>. The main content area is divided into two sections. On the left, a table titled 'WIF BEAM' has columns for 'CD47 ID', 'Create Admin', and 'Creation Date'. A single record is shown with a checked checkbox, and a red arrow points to it with the label 'New Record'. On the right, a 'WIF BEAM Information' form contains several fields: 'Customer Eligible' (radio button), 'Customer Interested' (radio button), 'WIF BEAM Participant' (checkbox), 'Enrollment Site' (dropdown menu), 'Enrollment Date', 'Group Assignment', 'Study ID', 'Participant Withdrew', and 'Date Withdrew'. The 'Enrollment Site' dropdown is open, showing a list of office locations: Herkimer Office (HMO WIB), Utica Office (HMO WIB), Rome Office (HMO WIB), Wampsville Office (HMO WIB), Oneonta Office (CDO WIB), Sidney Office (CDO WIB), Norwich Office (CDO WIB), Delhi Office (CDO WIB), Binghamton Office (Broome-Tioga WIB), Owego Office (Broome-Tioga WIB), and Ithaca Office (Tompkins WIB). A red arrow points to the 'Customer Interested' dropdown with the label 'Drop Down Menus'. At the bottom of the form are buttons for 'Add', 'Delete', 'Print List', 'Help', 'Print Record', and 'Audit'. A footer bar contains buttons for 'Save', 'Start Match', 'Services', 'Comp Assess', 'Activity', 'I.A. Referrals', 'Correspond', 'IVR', 'Ret to Srch', 'Comments', 'Tag', 'Resume', 'Schd', and 'Message'.

Remember to click the **Save** button when all changes have been entered.



RESOURCES AND ASSISTANCE

Ms. Veronica Miller

(315) 798-5537

vmiller@working-solutions.org

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