

Hunger Free America OSOS Guide



TABLE OF CONTENTS

Table of Contents	1
Purpose	1
Searching for the Customer	2
Quick Search	3
Searching for Customer by Full or Partial Name	3
Searching by Full Social Security Number or NY ID	5
Basic Customer Record	8
Basic Customer Record Details	9
Comprehensive Assessment tab	15
Case Notes	19
Services	20
Closing a Service.....	30
Resources and Assistance	31

PURPOSE

New York State Department of Labor (NYSDOL) is partnering with Local Workforce Development Boards (LWDBs) as project operators to coordinate local disaster relief employment projects in the hardest impacted counties. The LWDBs will identify worksite employers to provide a variety of critical clean-up and humanitarian services within their local areas. LWDBs will coordinate with worksite employers to fund the wages and fringe of eligible participants as temporary workers in roles including, but not limited to contact tracing, vaccination administration, sanitizing of public spaces (e.g., schools), and distribution of essential supplies (e.g., food, water, medication) to infirm, quarantining, or otherwise housebound individuals. Supportive services needed to carry out the disaster-relief projects will be provided as needed.

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 provides instructions on how to conduct the OSOS data entry for the Hunger Free America Program.



SEARCHING FOR THE CUSTOMER

When staff enter customer data into OSOS, it is important to determine if a record already exists for the customer. In addition, there may be instances where there are two existing records, or duplicate records, for the customer. When this occurs, we often see that one account has a Social Security Number and one does not. Following the instructions below ensures that any duplicate records can be found and addressed accordingly.

Searches are performed within the **Customer Search** window, in the **Customer** module.

While searches are most commonly performed from the **Criteria** tab, **Quick Search** Link, any of the active links can be used in the search process. In addition, once you are case managing a customer, and their Customer ID is known, you may search for the customer using the Customer ID field.

The screenshot displays 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, a sub-navigation bar shows 'Customer Search' and 'Customer Detail'. The main content area is titled 'Customer Quick Search' and contains several input fields and buttons. The 'Quick Search' tab is active, with other tabs like 'General Info', 'Education', 'Job Criteria', 'Text Search', 'Geographic', 'Activities', 'Programs', and 'List Search' visible. The 'Customer SSN' section has a small input field for 'SSN 1' and a larger text area for 'Enter or paste one or more Customer SSNs', with a 'Validate SSN List' button below. The 'Customer ID' section has a small input field for 'ID 1' and a larger text area for 'Enter or paste one or more Customer IDs', with a 'Validate Customer ID List' button below. To the right, there are individual input fields for 'Partial SSN', 'Last Name', 'First Name', 'Middle Initial', 'Birth Date', 'Username', 'Email Exists' (a dropdown menu), and 'Email'. At the bottom of the interface, there is a toolbar with buttons for 'Search', 'Save Search', 'Export', 'Links |L|', 'Clear', 'New +', and 'Custom'.

QUICK SEARCH

A customer search is most commonly performed from the **Customer Search** window, **Criteria** tab, **Quick Search** link. There are numerous ways a customer search can be conducted depending on the information the staff has obtained. Staff will mainly search by a **Customer's Full** or **Partial Name**.

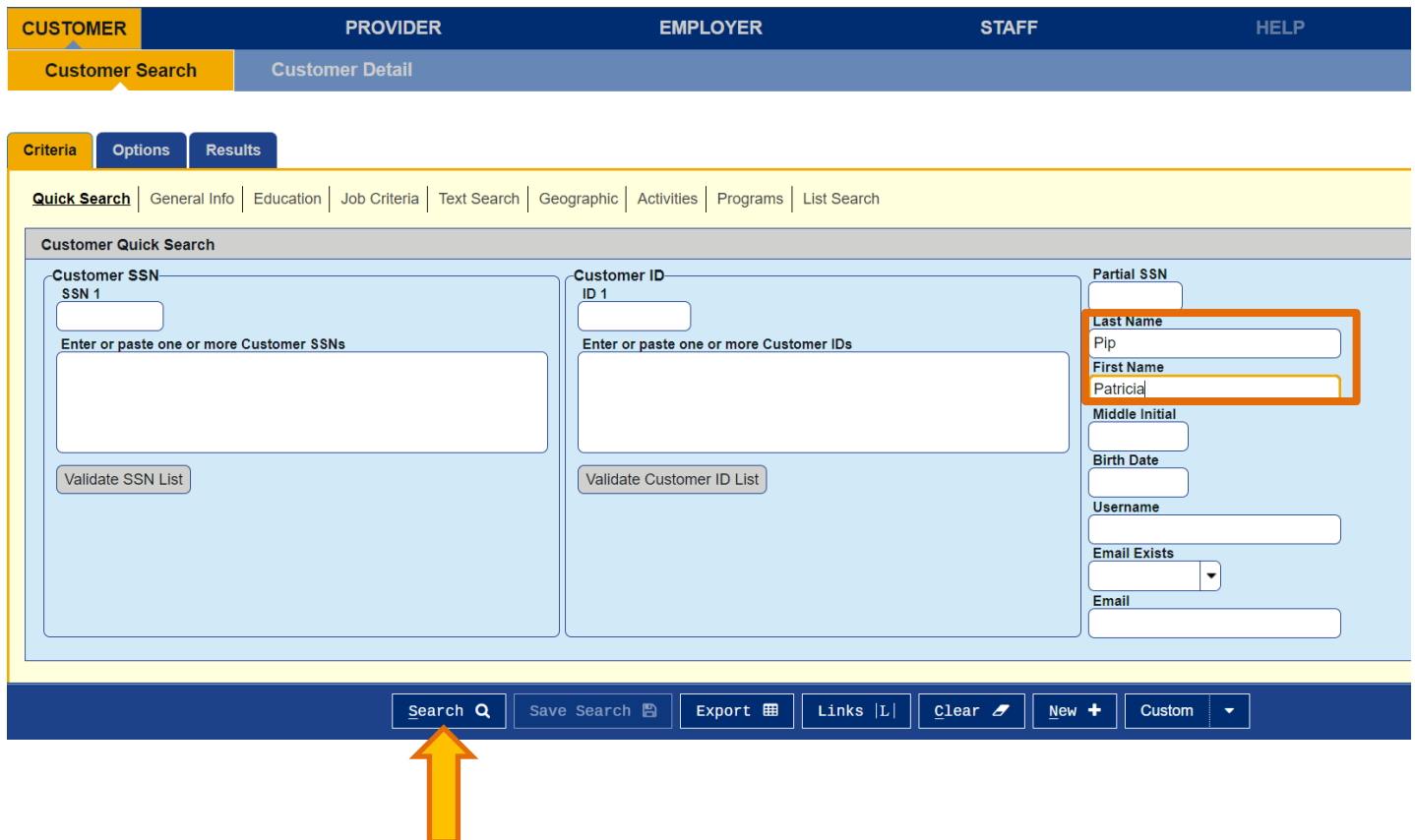
SEARCHING FOR CUSTOMER BY FULL OR PARTIAL NAME

Staff may search for a customer record by full or partial name. Enter as much information as is known in the **Last Name** and **First Name** data fields.



As a best practice, staff should perform a name search for any customer they are working with to determine if duplicate OSOS records exist for the same customer. If a duplicate record is found, please contact help.osos@labor.ny.gov.

Click the **Search** button.





If there is only one result returned, OSOS will display the customer's record. It will default to the **General Information** tab of the **Customer Detail** window.

CUSTOMER PROVIDER EMPLOYER STAFF HELP ADMIN

Customer Search Customer Detail Logout

Pip, Patricia SSN: ***-**-1116 OSOS ID: NY016817414 1 of 1

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

Customer Info

Customer Data

*Status: Active *Job Seeker: Active *Ethnic Heritage and Race: []

*Username: Pip123 *Password: 123Pip Merge

*Last Name: Pip *First Name: Patricia MI: []

Citizenship: U.S. Citizen

Education & Employment

*Education Level: High School Equivalency

*School Status: []

If there is more than one customer record matching the search criteria, the customers' information will be displayed in the **Results** tab in the **Customer Search** window.

CUSTOMER PROVIDER EMPLOYER STAFF HELP ADMIN

Customer Search Customer Detail Logout Results: 3

Criteria Options Results

1-3 of 3

	OSOS ID	Vet	Status	Seeker Name	WIOA	Rpt Indiv	Ad/DW/RR/Yth	IWT	TAA	LX	Other WIOA	State-Defined
<input checked="" type="checkbox"/>	NY016817414	No	Active	Pip, Patricia	Inactive	Inactive				Inactive	Inactive	
<input type="checkbox"/>	NY016815144	No	Inactive	Pip, Patricia	Inactive	Inactive	Inactive			Inactive	Inactive	
<input type="checkbox"/>	NY008278777	No	Inactive	PIPHER, PATRICIA J								

1-3 of 3



If the search yields more than one result, staff can view all the records by first clicking on the check box in the top left-hand corner of the gray title bar. This will select all the results. Staff can then click on **Detail** at the bottom of the screen to review all selected customer records.

CUSTOMER PROVIDER EMPLOYER STAFF HELP ADMIN

Customer Search Customer Detail Logout

Results: 3

Criteria Options Results

1-3 of 3

<input checked="" type="checkbox"/>	OSOS ID	Vet	Status	Seeker Name	WIOA	Rpt Indiv	Ad/DW/RR/Yth	IWT	TAA	LX	Other WIOA	State-Defined
<input checked="" type="checkbox"/>	NY016817414	No	Active	Pip, Patricia	Inactive	Inactive				Inactive	Inactive	
<input checked="" type="checkbox"/>	NY016815144	No	Inactive	Pip, Patricia	Inactive	Inactive	Inactive			Inactive	Inactive	
<input checked="" type="checkbox"/>	NY008278777	No	Inactive	PIIPHER, PATRICIA J								

1-3 of 3

Detail Print Assign to List Add to CL Post Match Refer Activity P/PA Comments Correspond IVR

Links Clear New

OSOS will display the customer record of the first customer selected. Use the arrows at the top right corner of the screen to toggle through the customer records. Staff can review the records to identify the customer they were searching for, as well as to identify potential duplicate records.

CUSTOMER PROVIDER EMPLOYER STAFF HELP ADMIN

Customer Search Customer Detail Logout

Pip, Patricia SSN: ***-**-1116 OSOS ID: NY016817414

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

Customer Info

Customer Data

*SSN: Active *Job Seeker: Active *Ethnic Heritage and Race

*Username: Pip123 *Password: 123Pip Merge

*Last Name: Pip *First Name: Patricia MI

*Date of Birth: 03/17/1989 *Gender: Female *Portfolio Level: JobZone Adult

*Address 1: 123 Pip Street

*Address 2:

*City: Albany *State: New York *ZIP Code: 12240

Country: Albany Country: United States Metro:

Citizenship

*U.S. Citizen

Education & Employment

*Education Level: High School Equivalency

*School Status: Not Attending School; Secondary School Graduate/Equivalent

*Employment Status: Not Employed

Underemployed Long Term Unemployed

Contact Preferences

*Use Postal *Pri. Phone *Alt. Phone *Fax

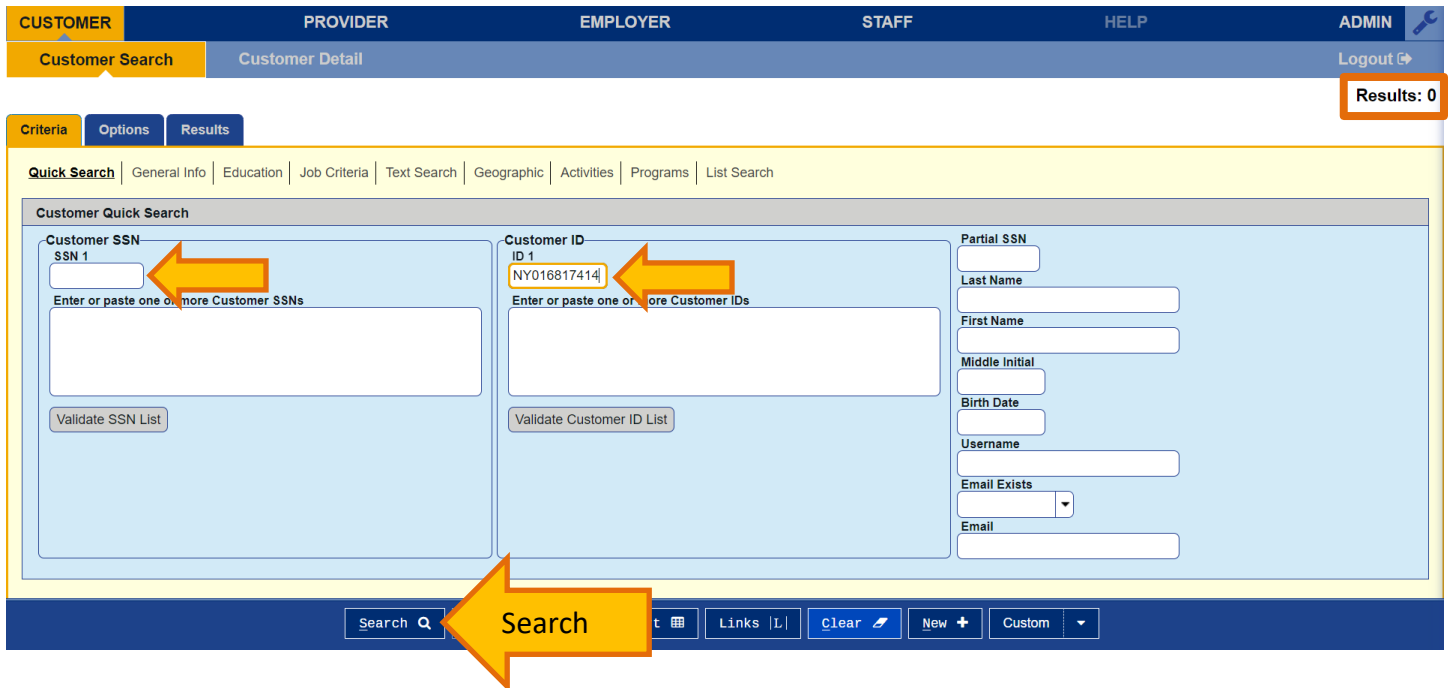
Save Start Match Activity I.A. Referrals Correspond IVR Links Ret To Srch Comments Tag Schedule

WIOA Eligibility Summary JobZone Reload Custom

SEARCHING BY FULL SOCIAL SECURITY NUMBER OR NY ID

Once staff are case managing a particular customer, they can search by **Customer SSN** or **Customer ID** in the **Quick Search** link to find the customer record.

Then click the **Search** button at the bottom of the screen.



The screenshot displays the OSOS Customer Quick 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 search area is titled 'Customer Quick Search' and contains three input fields: 'Customer SSN', 'Customer ID', and 'Partial SSN'. The 'Customer SSN' field has a yellow arrow pointing to it, and the 'Customer ID' field has a yellow arrow pointing to it. Below these fields are 'Validate SSN List' and 'Validate Customer ID List' buttons. To the right of the input fields are several other form fields: Last Name, First Name, Middle Initial, Birth Date, Username, Email Exists (a dropdown menu), and Email. At the bottom of the search area, there is a 'Search' button with a magnifying glass icon, highlighted with a large yellow arrow. To the right of the search button are buttons for 'Clear', 'New', and 'Custom'. In the top right corner of the search area, there is a box that says 'Results: 0'.

If there is a matching record, OSOS will display the customer's record. If there is no matching record, the system will display **No Matches Found** or **Results: 0** in the upper right-hand corner. Additional information about searching for a customer record can be found at <https://dol.ny.gov/system/files/documents/2024/10/osos-performaing-a-customer-search-guide.pdf>



*The search can be based on either SSN or ID number, but it cannot be based on both. Including data in both the **Customer SSN** field and the **Customer ID** field will result in an error message.*



If an existing customer record cannot be found, click the **New** button at the bottom of the screen to create a new customer record.

CUSTOMER PROVIDER EMPLOYER STAFF HELP ADMIN

Customer Search Customer Detail Logout

Results: 0

Criteria Options Results


Quick Search | General Info | Education | Job Criteria | Text Search | Geographic | Activities | Programs | List Search

Customer Quick Search

<p>Customer SSN SSN 1</p> <input type="text"/> Enter or paste one or more Customer SSNs	<p>Customer ID ID 1</p> <input type="text"/> Enter or paste one or more Customer IDs	<p>Partial SSN</p> <input type="text"/> Last Name <input type="text"/> First Name <input type="text"/> Middle Initial <input type="text"/> Birth Date <input type="text"/> Username <input type="text"/> Email Exists <input type="text"/> Email <input type="text"/>
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Validate SSN List Validate Customer ID List

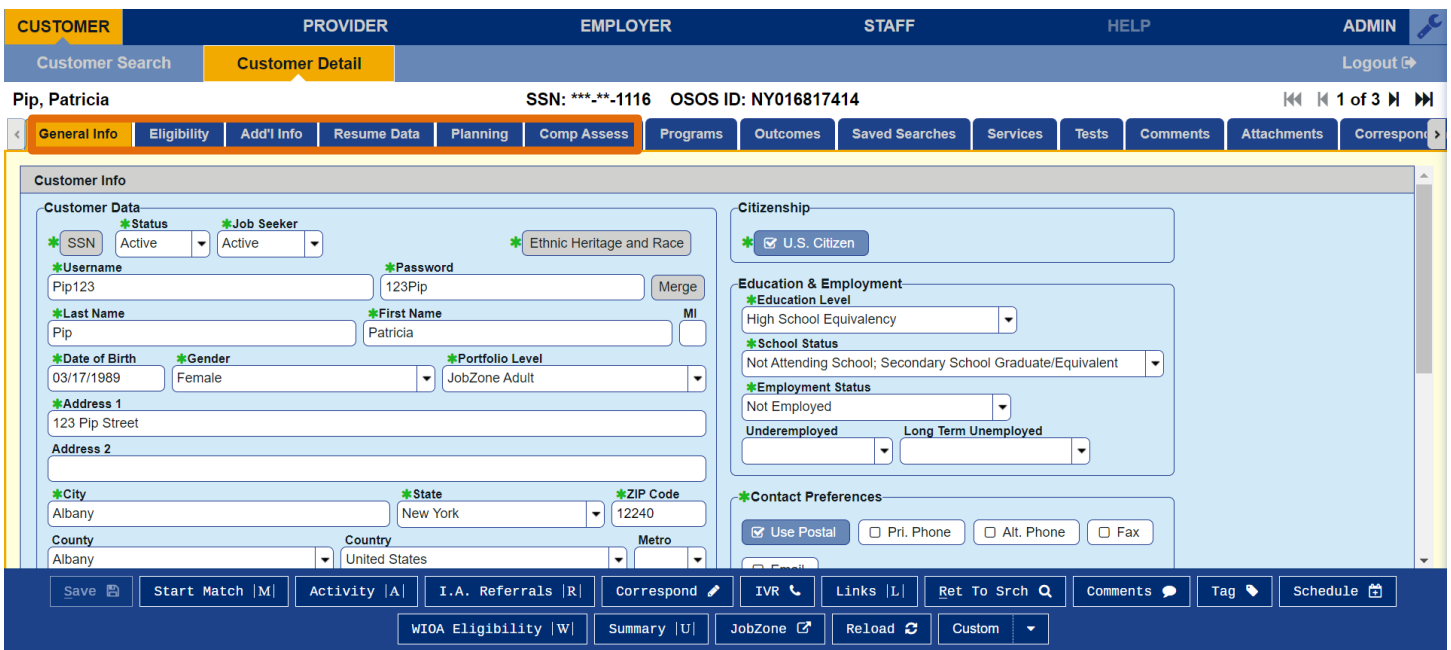
Search Save Search Export Links | L | Clear **New**



BASIC CUSTOMER RECORD

Creating or updating a basic customer record requires data entry in six tabs. These tabs are located in the **Customer** module, **Customer Detail** window. They are:

- **General Info** tab
- **Eligibility** tab
- **Additional Info** tab
- **Resume Data** tab
- **Planning** tab
- **Comp Assess** tab



The screenshot displays the OSOS Customer Detail window for Patricia Pip. The window has a navigation bar with tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP, and ADMIN. Below this is a sub-navigation bar with tabs: Customer Search, Customer Detail, and Logout. The main content area shows the customer's name, SSN, and OSOS ID. Below this are several tabs: General Info, Eligibility, Add'l Info, Resume Data, Planning, Comp Assess, Programs, Outcomes, Saved Searches, Services, Tests, Comments, Attachments, and Correspond. The General Info tab is selected, showing a form with various fields. Fields with a green asterisk (*) indicate required information. The form includes sections for Customer Data, Citizenship, Education & Employment, and Contact Preferences. The Customer Data section includes fields for SSN, Status, Job Seeker, Username, Password, Last Name, First Name, Date of Birth, Gender, Portfolio Level, Address, City, State, ZIP Code, and Metro. The Citizenship section includes a checkbox for U.S. Citizen. The Education & Employment section includes fields for Education Level, School Status, and Employment Status. The Contact Preferences section includes checkboxes for Use Postal, Pri. Phone, Alt. Phone, and Fax.



*All required fields in OSOS are indicated by a green asterisk * in front of the field name. To save the basic customer record, all required fields must be completed. However, to best serve the customer, staff should always enter as much information as possible.*



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.



Staff must review all of the information in the customer record each time they work with the customer. This ensures that the record reflects the most up to date and accurate information.

BASIC CUSTOMER RECORD DETAILS

For detailed information on creating a new customer record, please see the Creating a Basic Customer Record Guide found here <https://dol.ny.gov/system/files/documents/2024/10/osos-creating-a-basic-customer-record-guide.pdf>.

Below are some noteworthy points for filling out the tabs located within the **Customer Detail** window.

General Info Tab

- **SSN:** The SSN field is located "behind" a button in order to keep it as confidential as possible. When the customer provides their SSN it must be entered. Having an SSN in OSOS is very important because customer SSNs are used to match against wages and determine if the customer is employed. Entering a customer's SSN also helps prevent duplicate records.

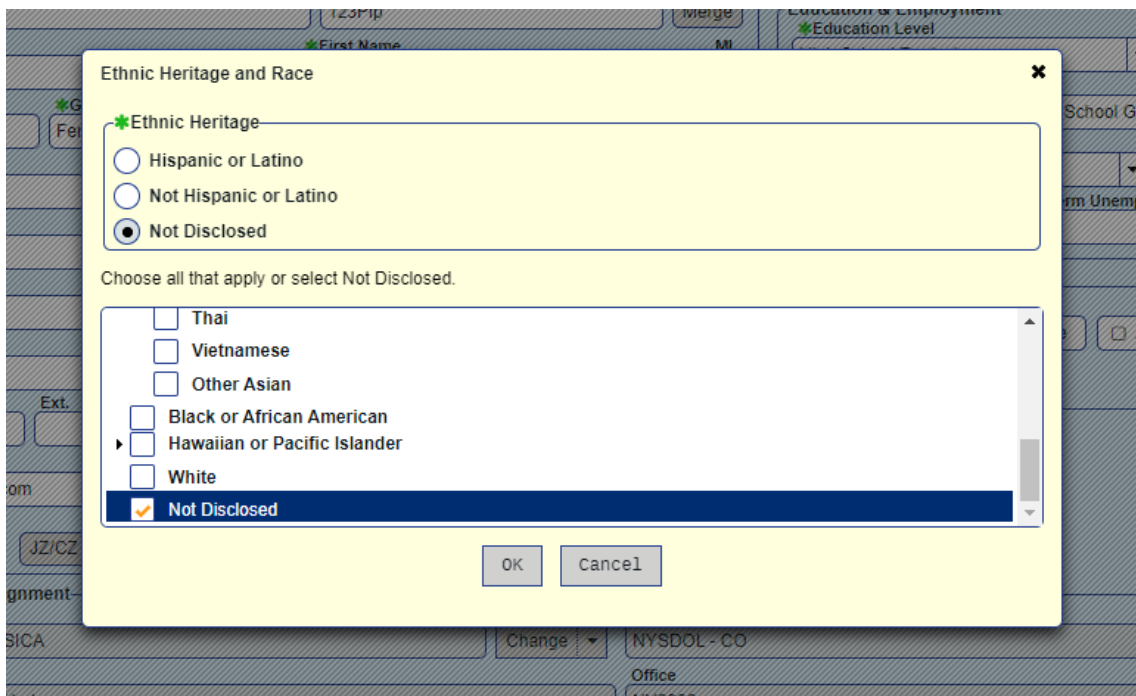
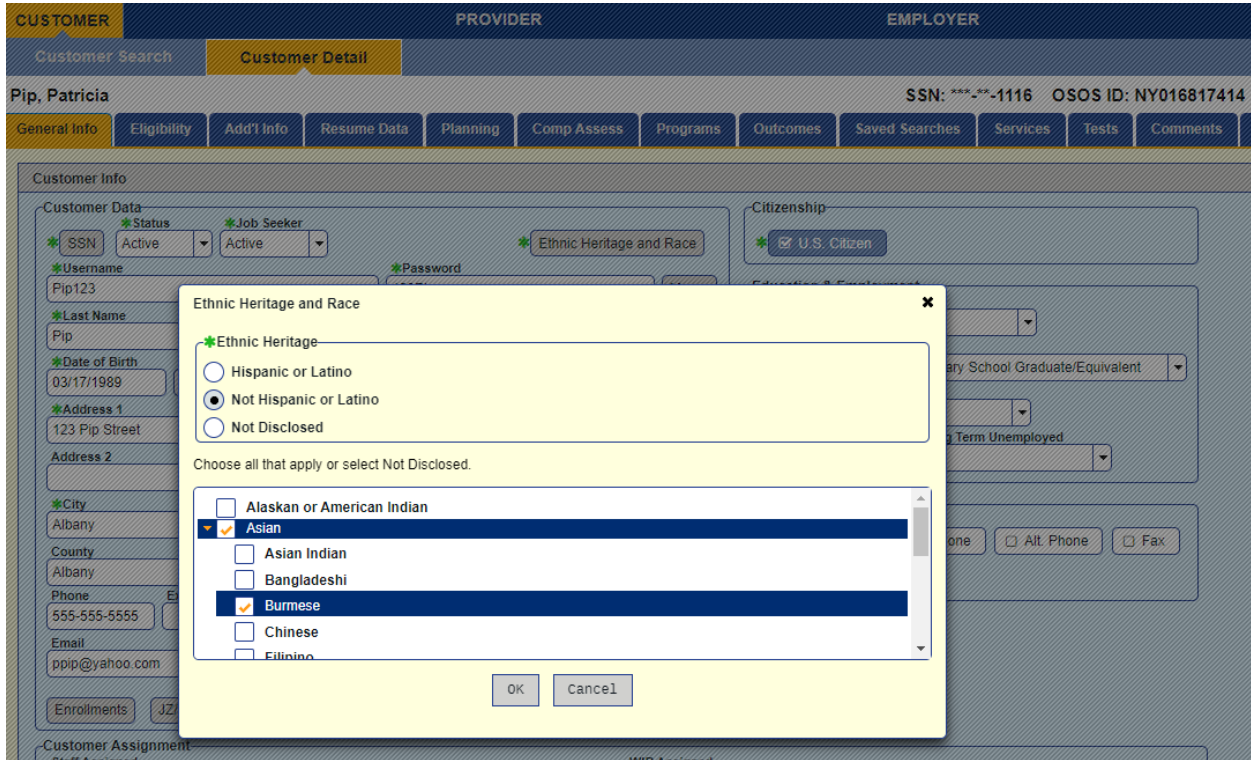
The screenshot displays the OSOS Customer Detail window for a customer named Pip, Patricia. The window is divided into several tabs: General Info, Eligibility, Add'l Info, Resume Data, Planning, Comp Assess, Programs, Outcomes, Saved Searches, Services, Tests, and Comments. The General Info tab is active, showing various fields for customer information. A dialog box titled "SSN" is overlaid on the screen, prompting the user to enter the Social Security Number (SSN) and confirm it. The dialog box contains the following fields and options:

- SSN: 111-11-1116
- Confirm SSN: 111-11-1116
- Not Disclosed
- Buttons: Save, Cancel

The background window shows the following information for the customer:

- Customer Name: Pip, Patricia
- SSN: ***-**-1116
- OSOS ID: NY016817414
- Status: Active
- Job Seeker: Active
- City: Albany
- County: Albany
- Country: United States
- Phone: 555-555-5555

- Ethnic Heritage & Race:** This information is also located "behind" a button in order to keep it as confidential as possible. Select the **Ethnic Heritage & Race** button. If the customer provides Ethnic Heritage and/or Race information, select the most appropriate choices. If no information is provided, select **Not Disclosed**.



- **Portfolio Level** - A new record will default to **JobZone Adult**.
- **Username and Password** - While this is a required field, any record with **Portfolio Level** set to **JobZone** will not use these fields for JobZone access. All **Portfolio Levels** other than **JobZone Adult** will use these fields as login credentials for Career Zone. Any unique username and any password may be entered in these fields, as long as they are at least 6 characters in length.

CUSTOMER
PROVIDER
EMPLOYER

Customer Search
Customer Detail

Pip, Patricia SSN: ***-**-1116 OSOS ID: NY016817414

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

Customer Info

Customer Data

*SSN: Active | *Status: Active | *Job Seeker: Active | *Ethnic Heritage and Race

*Username: Pip123 | *Password: 123Pip

*Last Name: Pip | *First Name: Patricia | MI:

*Date of Birth: 03/17/1989 | *Gender: Female | *Portfolio Level: **JobZone Adult**

*Address 1: 123 Pip Street

*City: Albany | *State: New York

Country: Albany, United States

Phone: 555-555-5555 | Email: ppip@yahoo.com

Enrollments: | JZ/CZ Manager: No | Add to Case Load

Citizenship

*U.S. Citizen:

Education & Employment

*Education Level: High School Equivalency

*School Status: Not Attending School; Secondary School Graduate/Equivalent

*Employment Status: Not Employed

Underemployed: | Long Term Unemployed:

Contact Preferences

Use Postal | Pri. Phone | Alt. Phone | Fax

Email

Customer Assignment

Staff Assigned: DUPUIS, JESSICA | Change

WIB Assigned: NYSDOL - CO

Agency: Department of Labor | Office: NY9999 | Change Office

UI Claimant: | Registered: 06/01/2023 | Origin: Staff | Profiled: | Profiled Date:

Internet Resume | Confidential | Work Search Record

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

Additional Info Tab

- **Veteran Status** is required. Staff may select Yes, No or Not Disclosed.
- **Selective Service** must be updated based on whether or not the customer is required to register to selective service. If the customer was born female, staff should select Not Required. If the customer was born male, staff must select Yes or No.
- Additional information entered on this tab can be used to match customers to relevant job postings.

Planning Tab

- **Desired O*Net:** At least one **O*Net title** is required. Click the **Add a Job Title** button. Then, click the **O*Net Titles** button. This opens the Select O*Net Webpage Dialogue box. Use the Keyword search at the bottom or the O*Net folder hierarchy to find the job title most closely related to the employment the participant is seeking. Check the box next to the job title. Then click **Select**.

* Desired O*Net

O*Net O*Net Title O*Net Titles

Experience Years Experience Months

	O*Net Title ⇅	Exp. (Months) ⇅
<input type="checkbox"/>	Fashion Designers	25
<input type="checkbox"/>	Floral Designers	6
<input type="checkbox"/>	Interior Designers	17
<input checked="" type="checkbox"/>		

Add a Job Title
Delete Selection
Skills
Custom ▾

Select O*Net

Current O*Net—
O*Net Title

Hierarchy Search Details

- ▶ 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
- ▶ Legal Occupations

Keyword(s): Search Reset

Select Clear Cancel



Resume Data Tab

Many participants served under this grant were placed in temporary employment after they lost their prior job as a result of the COVID-19 pandemic. These participants must be documented in OSOS as dislocated workers.

To properly document a dislocated worker, the **Resume Data** tab must be completed. The customer's most recent job prior to the participation in the grant must be recorded. For this job entry, select **Category 1 DW** in the **Reason for Leaving** field. Category 1 Dislocated Workers must have a **Dislocation Date** and **Tenure**. All other required fields must also be filled out.

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

Resumes | Contact Information | **Work History** | Driver's License | Schools | Licenses/Certifications | Professional Associations | Awards | Qualifications | Skills | Functional Areas | Other

Job Information

Job Data		Employer Data	
*Job Title Waitress		*Employer Applebees	
O*Net Code 35-3031.00	O*Net Title Waiters and Waitresses	*O*Net Titles	
Job Type Full Time	*Start Date 03/04/2021	*End Date	Present Job <input type="checkbox"/>
Wage	Salary Unit	Hours/Week	
*Reason for Leaving Category 1-DW		*QDD 05/01/2019	*Tenure 8
Work Setting	Type Customized employment Services		
Address		Address 2	
*City Albany	*State New York	ZIP Code	
*Country United States			
Supervisor		Phone	Ext.
NAICS	Title		NAICS
RR Event #		Event	

*Job Duties

Search/Add Skills | **B** **I** **U** |

Customer service, food server and food prep. Money handling and night closer.]



Click into the Job Duties text box to enter the job duties in the freeform text box and click **Save**.

CUSTOMER
PROVIDER
EMPLOYER

Customer Search
Customer Detail

Pip, Patricia SSN: ***-**-1116 OSOS ID: NY016817414

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

Resumes | Contact Information | Work History | Driver's License | Schools | Licenses/Certifications | Professional Associations | Awards | Qualifications | Skills | Functional Areas | Other Sec

Job Information

Job Data

*Job Title
Floral Designer

O*Net Code: 27-1023.00 O*Net Title: Floral Designers O*Net Titles

Job Type: Full Time *Start Date: 05/09/2020 *End Date: 11/09/2020 Present Job

*Wage: \$ 15.00 *Salary Unit: Hourly Hours/Week: 37

*Reason for Leaving: Quit

Work Setting: Type Customized Employment Services:

Employer Data

*Employer: Flower Power Inc.

*Address: 1 Floral Way Address 2:

*City: Anytown *State: New York *ZIP Code: 12345

*Country: United States

Supervisor: Phone: Ext:

NAICS: Title: NAICS

RR Event #: Event:

*Job Duties

Search/Add Skills | **B** **I** **U** |

Customer service including meeting and working with clients to fulfill their floral needs and requirements, floral maintenance and design. Planning and prepping floral arrangements for clients and for shop displays. Thinking outside the box to come up with new ideas and designs for floral displays and arrangements.

1-4 of 4 100

Job
Company
City

New Job Entry + Delete Selection Show Resume Usage

Save
Activity |A|
I.A. Referrals |R|
Correspond
IVR
Links |L|
Ret To Srch
Comments



COMPREHENSIVE ASSESSMENT TAB

Information documented in the **Comprehensive Assessment** tab is important for recording the customer's barriers and challenges. For detailed information on completing the Comprehensive Assessment section, please see the Comprehensive Assessment Guide found here <https://dol.ny.gov/system/files/documents/2024/10/osos-comprehensive-assessment-and-supplemental-data-guide.pdf>

Many of the fields in Comp Assess are used to determine eligibility under WIOA programs. Participants in the Hunger Free America program does not need to be co-enrolled in the WIOA programs. Participants served solely under this program will not be included in local WIOA performance measures. For the purposes of this program, providers should only enter information that is known. If the information is unknown, please select **No** or **Not Disclosed**.

In order to provide additional services to participants, Local Areas may choose to co-enroll in a WIOA program. If a customer is being enrolled in both the Hunger Free America program and a WIOA program, then information required under WIOA must be entered in OSOS. Once a customer is co-enrolled, all WIOA eligibility, data entry, and reporting requirements must be followed. Co-enrolled customers will be included in Local Area performance measure.



When information is entered into the Comprehensive Assessment section, all required data fields (as indicated by a green asterisk) must be completed in order to save the record.



CUSTOMER		PROVIDER	EMPLOYER
Customer Search	Customer Detail		
Pip, Patricia			SSN: ***-**-1116 OSOS ID: NY016817414
General Info	Eligibility	Add'l Info	Resume Data
Planning	Comp Assess	Programs	Outcomes
Saved Searches	Services	Tests	Comments
Employment Education Financial Family Health Treatments Legal Housing Transportation			
Employment			
Origination Date: 06/01/2023 Last Update: 06/01/2023 Staff Assigned: DUPUIS, JESSICA		Job Behavior and Skills Employment Behavior Job Seeking Skills Job Keeping Skills Summary of Occupational Strengths and Weaknesses	
Employment Objective Job Title: Fashion Designers Wage Desired: _____ Per Hourly		<input type="button" value="View Employment History"/>	
Geographical Location Within 25 miles of 12240 _____ _____			
Is the customer interested in non-traditional Employment? <input type="button" value="Yes"/> <input type="button" value="No"/>			
Current Employment Status: Not Employed			
<input type="checkbox"/> Poor Work History?			
Youth Needing Additional Assistance? No			
Serious Barriers to Employment? No			
*Cultural Barriers to Employment? No			
Other Barriers to Employment? No			
<input type="button" value="Save"/>	<input type="button" value="Start Match M "/>	<input type="button" value="Activity A "/>	<input type="button" value="I.A. Referrals R "/>
<input type="button" value="Correspond"/>	<input type="button" value="IVR"/>	<input type="button" value="Links L "/>	<input type="button" value="Get To Srch"/>
<input type="button" value="Comments"/>			

Below are some noteworthy points for filling out the links located within the **Comprehensive Assessment** tab for participants only enrolled under the COVID-19 DW grant. However, as a best practice, staff should always enter as much information as known about the customer to better serve them.

Employment link

- **Youth Needing Additional Assistance:** Local area determines what youth will fall into this category. For the purposes of this initiative, staff may select **No**.
- **Cultural Barriers to Employment:** This information is collected as a requirement under WIOA and is not related to this initiative. Staff may select **Not Disclosed**.

Education link

- **Basic Skills Deficient/Low Levels of Literacy:** Providers do not need to determine basic skills deficiency. Only enter this information if it is known. If unknown, select **No**.
- **English Language Learner:** An English Language Learner will have limited ability in speaking, reading, writing or understanding English. They may also meet one of the following two conditions:
 - Their native language is a language other than English; or
 - They live in a family or community where a language other than English is the main language.

Financial link - Do not enter any information into this tab.

Family link

- **Marital Status** - Select the option that most closely reflects the customer's marital status or select **Not Disclosed**.
- **Family Status** - Select the option that most closely reflects the customer's family status. In most cases, such as a non-parenting youth, the customer is considered an **Other Family Member** or select **Not Disclosed**.
- **Is Customer parenting youth?** - Female youth customers are considered parenting once pregnant. Alternatively, male youth customers are only considered parenting once their child is born.



*Youth customers will have the additional required field **Is customer pregnant?** If **Yes** is selected, staff must enter a **Delivery Date**.*



Health link and **Treatment link**- are both not accessible. They require no action.

Legal link - There is no required information located in this tab. However, if the customer discloses that they are an ex-offender, staff should select **Yes**. If the customer identifies as an ex-offender, record relevant comments in the **Customer Detail** window, **Comments** tab. Information recorded would include when the conviction occurred, and whether the customer has work restrictions. Comments must be specific to job search restrictions and work search restrictions only.

Housing link - For current housing, select the option that most closely reflects the customer's current housing status. Many youth will not own or rent their own home, so this information should be based on their care taker. For instance, if the youth live in a home owned by their parent(s), select **Own** or select **Not Disclosed**.

Staff must also enter the grant-funded employment as a new job entry in OSOS.

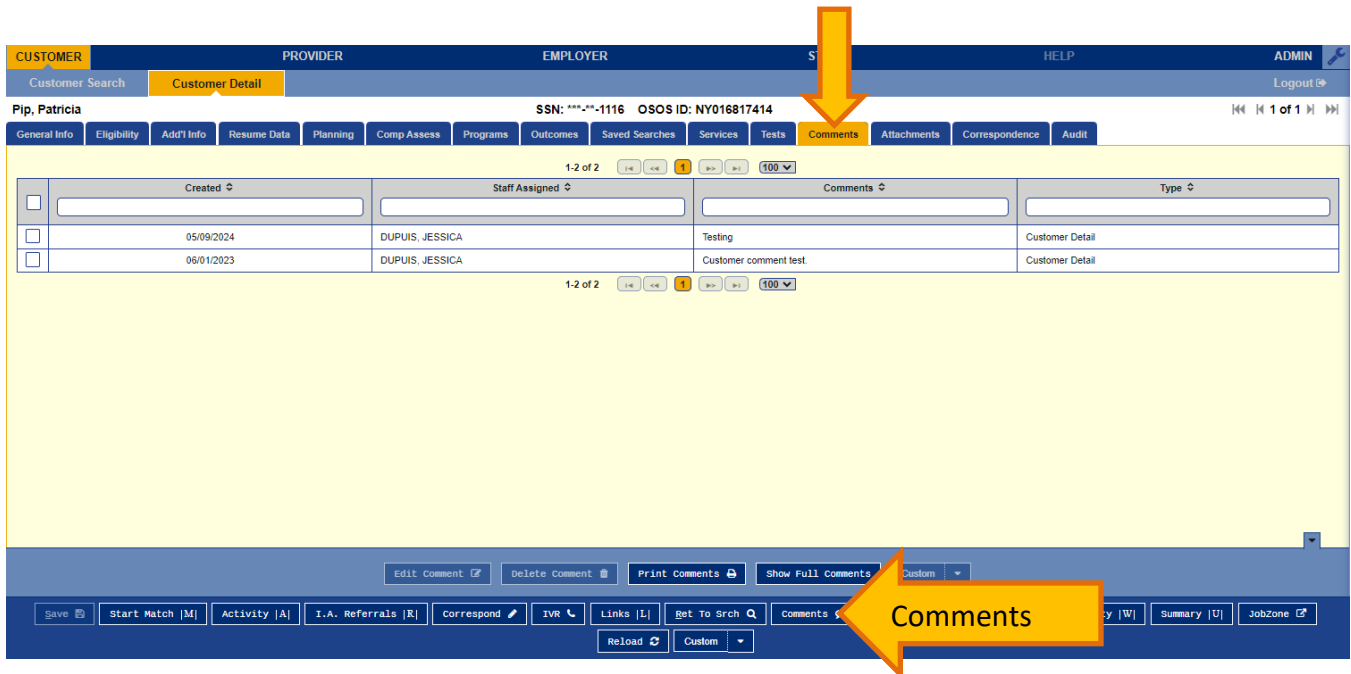


*Once the entire basic customer record has been entered, click the **Save** button at the bottom of the screen. **Record Saved** will briefly be displayed in the upper right-hand corner when the record is successfully saved. If there are fields missing information, an Error Message pop up box will indicate the error.*

CASE NOTES

It is important to document case notes in the customer record. It is best practice to record case notes every time staff work with the customer. Case notes are documented in the **Customer** module, **Customer Detail** window, **Comments** tab, using the **Comments** button.

Case notes should include details of the appointment that are not recorded anywhere else in OSOS. They should be clear, factual, relevant to employment, and show a logical progression. Case notes allow staff to gain a more complete understanding of the customer's situation.



The screenshot displays the OSOS interface for a customer named Patricia Pip. The 'Comments' tab is selected in the navigation bar. A table lists two comments:

Created	Staff Assigned	Comments	Type
05/09/2024	DUPIUIS, JESSICA	Testing	Customer Detail
06/01/2023	DUPIUIS, JESSICA	Customer comment test.	Customer Detail

At the bottom of the screen, a toolbar contains various action buttons. An orange arrow points to the 'Comments' button in this toolbar.



SERVICES

Once you have created/updated the customer's record and documented DW status, proceed to the **Services** tab, **Services** link to enter services that are being provided to the customer.

To record a service, first select the **Services** tab, then **Services** link.

CUSTOMER | PROVIDER | EMPLOYER

Customer Search | **Customer Detail**

Pip, Patricia | SSN: ***-**-1 | OSOS ID: NY01681741

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

Activities | **Services** | History

Detail

Service ID	Service Name	Service Type
145741	New Training	Occupational Skills Training

Service Description: New Training Add'l Service Info

Provider ID	Provider Name	Location Name	Offering ID
92645	ABC	Office Building	146274

Select the **New Service** button.

O*Net | Title | NAICS | Title

WIB: NYSDOL - CO | Agency: Department of Labor | Office: NY9999 Change Office

Staff Assigned: DUPUIS, JESSICA Change | Orig. Oblig. | Total Oblig. | Offering Cost: \$ 1.00 | Actual Cost

1-4 of 4

	Provider Name	Service Name	Actual Start Date
<input checked="" type="checkbox"/>	ABC	New Training	
<input type="checkbox"/>	ABC	New Training	
<input type="checkbox"/>	Abc Ducks	New Training	05/09/2024
<input type="checkbox"/>	Functional Alignment PY 2006	Job Referral	06/01/2023

1-4 of 4

Options Print List **New Service** Authorization IPA Service S

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



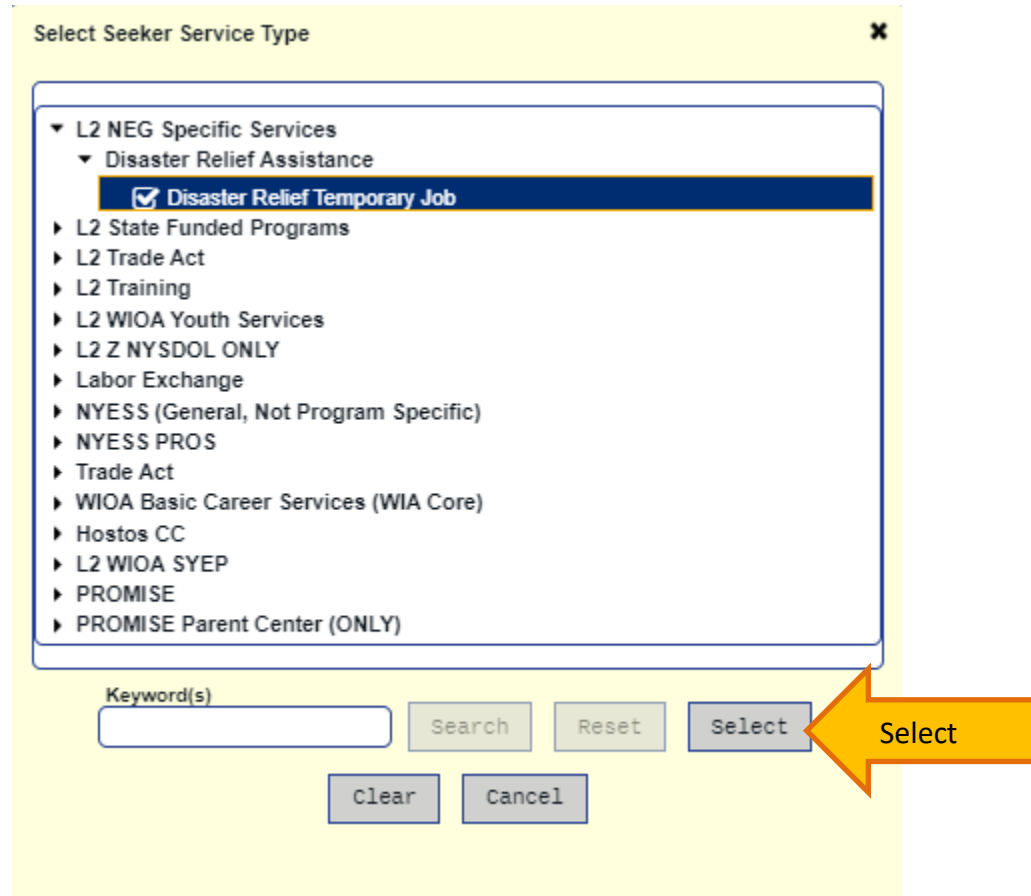
This navigates to the **Provider** module, **Offering Search** window, **Criteria** tab, **Quick Search** link. Select the **General Info** link.

The screenshot shows the OSOS interface with the 'PROVIDER' module selected. The 'Offering Search' window is open, and the 'Criteria' tab is active. The 'Quick Search' link is highlighted, and an orange arrow points to the 'General Info' link in the sub-menu.

Verify the correct **WIB** (Local Workforce Development Area) is selected. Click the **Service Type** button to bring up a new webpage dialog box.

The screenshot shows the 'General Info' form in the 'Offering Search' window. An orange arrow points to the 'WIB' dropdown menu, which is currently set to 'New York City'. Another orange arrow points to the 'Service Type' button. The form includes fields for 'Location', 'Provider Information', 'Pay for Performance', 'ETP Status', 'Training Prerequisite', 'Credential Name', 'ETP Program of Study Leading to', and 'Program Format'.

Select the **Disaster Relief Temporary Job** service from the L2 NEG Specific Services folder.
Click **Select**.



Select Seeker Service Type

- ▼ L2 NEG Specific Services
 - ▼ Disaster Relief Assistance
 - Disaster Relief Temporary Job
 - ▶ L2 State Funded Programs
 - ▶ L2 Trade Act
 - ▶ L2 Training
 - ▶ L2 WIOA Youth Services
 - ▶ L2 Z NYSDOL ONLY
 - ▶ Labor Exchange
 - ▶ NYESS (General, Not Program Specific)
 - ▶ NYESS PROS
 - ▶ Trade Act
 - ▶ WIOA Basic Career Services (WIA Core)
 - ▶ Hostos CC
 - ▶ L2 WIOA SYEP
 - ▶ PROMISE
 - ▶ PROMISE Parent Center (ONLY)

Keyword(s)

Select

Once the **Service Type** is chosen, click **Search**.

CUSTOMER		PROVIDER	EMPLOYER	STAFF
Provider Search	Provider Detail	Offering Search	Offering Detail	

Criteria Options Results

Quick Search | **General Info** | List Search

General Info

Location
 WIB: NYSDOL - CO City: Start Date Range: From To

Provider Information
 Provider Name: Service Name: Service Program:

Provider Status: Active Service Type: Disaster Relief Temporary Job **Service Type**

Pay for Performance: ETP Status: Training Prerequisite:

Credential Name:


ETP Program of Study Leading to—




Industry Recognized Certification Registered Apprenticeship State or National License Associate Degree Bachelor's Degree

Community College Certificate Secondary School Diploma or Equivalent Employment MSG Leading to Credential MSG Leading to Employment

Program Format

Part Time Learning Distance Learning Online Learning E-Learning In Person

Search 

Search  Export  Schedule Links | L | Clear 



The search results will be presented at the bottom of the screen.

Select the **Disaster Relief Temporary Job** service associated with your agency and click **Schedule**.

<input type="checkbox"/>	NEG Disaster Sandy - New York City	Disaster Relief Temporary Job	Roberto Clemente State Park				114086				New York						Disaster Relief Temporary Job - Sandy	Approved
<input type="checkbox"/>	NEG Disaster Sandy - New York	Disaster Relief Temporary Job-Sandy	MOUNT LORETTO				116518				New York						Disaster Relief Temporary Job- Hurrican Sandy	Not approved
<input checked="" type="checkbox"/>	Workforce1 Career Center	Disaster Relief Assistance	Workforce1 Career Center - Queens				153317			America's Job Center Local Office	New York						Disaster Relief Assistance	Approved

1-19 of 19 100

Detail Print **Schedule** Schedule Links |L| Clear



This brings you to the **Customer** module, **Customer Detail** window, **Services** tab, **Services** link. Select the Service using the check box in the far-left column.

Enter the following fields in the Detail section: **Plan Start Date**, **Plan End Date**, and **Actual Start Date**. If the employment has ended, enter the end date in the **Actual End Date** field. If the employment is ongoing, do not enter an **Actual End Date** until the employment has ended. Instructions for closing a service are provided later in this guide. As a best practice, enter a **Next Contact Date** to follow-up. A reminder will show up in your Staff Inbox when it's time to review the Service.

CUSTOMER
PROVIDER
EMPLOYER

Customer Search
Customer Detail

Pip, Patricia SSN: ***-**-1116 OSOS ID: NY016817414

General Info
Eligibility
Add'l Info
Resume Data
Planning
Comp Assess
Programs
Outcomes
Services
Tests
Comments

Activities
Services
History

Detail

Service ID: Service Name: Service Type:

Service Description: Add'l Service Info

Provider ID: Provider Name: Location Name: Offering ID:

Plan. Start: Plan. End: Program:

Act. Start: Act. End: Completed: Next Contact:

Pt Time Lm.: Distance Lm.: Min. Hours: Nbr. Weeks: Min. Prog. Agreed:

O*Net: Title: NAICS: Title: NAICS:

WIB: Agency: Office: Change Office

Staff Assigned: Change

Orig. Oblig.: Total Oblig.: Offering Cost: Actual Cost:

1-4 of 4 100

	Provider Name	Service Name	Actual Start Date
<input type="checkbox"/>	Abc Ducks	New Training	05/09/2024
<input type="checkbox"/>	Functional Alignment PY 2006	Job Referral	06/01/2023
<input type="checkbox"/>	Abc Welding	Welding	01/01/2020
<input checked="" type="checkbox"/>	Workforce1 Career Center	Disaster Relief Assistance	

1-4 of 4 100

Options
Print List
New Service
Delete Service
Authorization
IPA Service S

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



In the **Program Service Type** field, select **Individualized Career Services**.

In the **Program** field, select **Hunger Free America**.

Click the **Save** button.

Detail

Service ID	Service Name	Service Type			
152791	Disaster Relief Assistance	Disaster Relief Temporary Job			
Service Description					
Disaster Relief Assistance					
Provider ID	Provider Name	Location Name	Offering ID		
40525	Workforce1 Career Center	Workforce1 Career Center - Queens	153317		
Plan. Start	Plan. End	Program	Achievement Objective		
05/01/2024	11/01/2024	Hunger Free America			
Act. Start	Act. End	Completed	Next Contact	Program Service Type	
05/01/2024			08/01/2024	Individualized Career Services	
Pt Time Lrn.	Distance Lrn.	Min. Hours	Nbr. Weeks	Min. Prog. Agreed	
O*Net	Title	O*Net	NAICS	Title	NAICS
WIB	Agency	Office	Change Office		
NYSDOL - CO	Department of Labor	NY9999			
Staff Assigned	Orig. Oblig.	Total Oblig.	Offering Cost	Actual Cost	
DUPUIS, JESSICA			\$ 1.00		

1-4 of 4

	Provider Name	Service Name	Actual Start Date
<input type="checkbox"/>	Abc Ducks	New Training	05/09/2024
<input checked="" type="checkbox"/>	Workforce1 Career Center	Disaster Relief Assistance	05/01/2024
<input type="checkbox"/>	Functional Alignment PY 2006	Job Referral	06/01/2023
<input type="checkbox"/>	Abc Welding	Welding	01/01/2020

1-4 of 4

Options Print List New Service Delete Service Authorization IPA Service Summary

Save **Save** Activity | A | I.A. Referrals | R | Correspond IVR Links | L | Get To Srch | Comments | Tag

Next, you will attach the funding. Enter 1 into the **Total Funding** field.
Then click the **Add** button.


Funding

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

No records found.

Total Funding Petition #

Incumbent Worker Training RR Event #

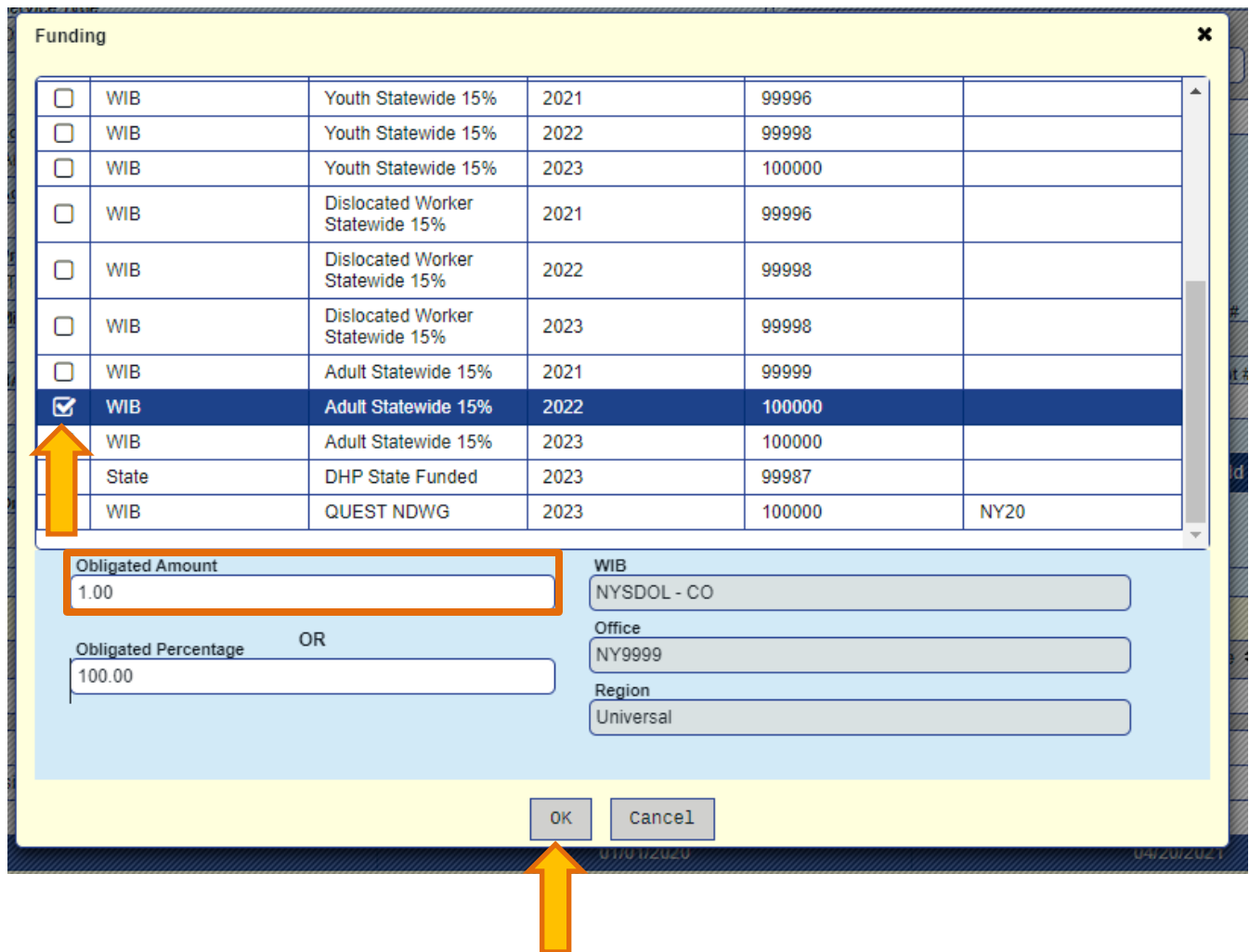


The **Funding Webpage Dialog** box will open.

Select the **Adult Statewide 15%** funding.

Enter 1 in the **Obligated Amount** field. This will automatically populate the **Obligated Percentage** field with 100.

Click **OK**.



	Agency	Funding Name	Year	Amount	Other
<input type="checkbox"/>	WIB	Youth Statewide 15%	2021	99996	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2022	99998	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2023	100000	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2021	99996	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2022	99998	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2023	99998	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2021	99999	
<input checked="" type="checkbox"/>	WIB	Adult Statewide 15%	2022	100000	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2023	100000	
<input type="checkbox"/>	State	DHP State Funded	2023	99987	
<input type="checkbox"/>	WIB	QUEST NDWG	2023	100000	NY20

Obligated Amount: 1.00

Obligated Percentage: 100.00

OR

WIB: NYSDOL - CO

Office: NY9999

Region: Universal

OK Cancel

The appropriate funding has now populated the **Funding** section.

Click **Save** at the bottom of the screen.

Funding

	Level ↕	Source ↕	Obligated ↕	Actual ↕	Oblig # ↕
<input checked="" type="checkbox"/>	WIB	Adult Statewide 15%	1		111695

Total Funding: Petition #:

Incumbent Worker Training: RR Event #:

1-4 of 4

	Provider Name ↕	Service Name ↕	Actual Start Date ↕
<input type="checkbox"/>	Abc Ducks	New Training	05/09/2024
<input checked="" type="checkbox"/>	Workforce1 Career Center	Disaster Relief Assistance	05/01/2024
<input type="checkbox"/>	Functional Alignment PY 2006	Job Referral	06/01/2023
<input type="checkbox"/>	Abc Welding	Welding	01/01/2020

1-4 of 4





CLOSING A SERVICE

It is important that an **Actual End Date** is added to a service when the grant funded employment has ended. This is called closing the service. Funded services, other than Follow-Up Services, that remain open will prevent a customer from exiting their enrollment.

To close an open service, navigate to the **Customer** module, **Customer Detail** window, **Services** tab, **Services** link. Select the service that has ended and must be closed.

Enter the **Actual End Date** and select **Completed** (yes/no).

Click **Save**. The service is now closed.

Detail

Service ID	Service Name	Service Type			
152791	Disaster Relief Assistance	Disaster Relief Temporary Job			
Service Description					
Disaster Relief Assistance Add'l Service Info					
Provider ID	Provider Name	Location Name	Offering ID		
40525	Workforce1 Career Center	Workforce1 Career Center - Queens	153317		
Plan. Start	Plan. End	Program	Achievement Objective		
05/01/2024	11/01/2024	Hunger Free America			
Act. Start	Act. End	Completed	Next Contact	Program Service Type	
05/01/2024	11/01/2024	Yes	08/01/2024	Individualized Career Services	
Pt Time Lm.	Distance Lm.	Min. Hours	Nbr. Weeks	Min. Prog. Agreed	
O*Net	Title	O*Net	NAICS	Title	NAICS
WIB	Agency	Office	Change Office		
NYSDOL - CO	Department of Labor	NY9999			
Staff Assigned	Orig. Oblig.	Total Oblig.	Offering Cost	Actual Cost	
DUPUIS, JESSICA Change	\$ 1.00		\$ 1.00		

1-4 of 4 1 100

	Provider Name	Service Name	Actual Start Date
<input type="checkbox"/>	Abc Ducks	New Training	05/09/2024
<input checked="" type="checkbox"/>	Workforce1 Career Center	Disaster Relief Assistance	05/01/2024
<input type="checkbox"/>	Functional Alignment PY 2006	Job Referral	06/01/2023
<input type="checkbox"/>	Abc Welding	Welding	01/01/2020

1-4 of 4 1 100

options Print List New Service Delete Service Authorization IPA Service Summary

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





RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found on the NYS Department of Labor website 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