

# QUEST NDWG OSOS Guide



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## PURPOSE

In May 2023, the United States Department of Labor announced the availability of funding for the 2023 Quality Jobs, Equity, Strategy, and Training (QUEST) Disaster Recovery National Dislocated Worker Grant (DWG) to increase employer and workforce system customer access to good jobs in the industry sectors most impacted by the COVID-19 pandemic. The New York State Department of Labor (NYSDOL) was awarded \$5 million under the QUEST NDWG and has partnered with CNY Works, Inc. to continue the Workforce Forward: Syracuse project, which expands upon existing I-81 initiatives and includes new infrastructure and care economy projects in the Onondaga County Local Workforce Development Area (LWDA). This project aims to achieve QUEST's goals, including access to good jobs in the infrastructure and care economy sectors, by utilizing pre-employment work readiness programs and expanding career exploration assessments, comprehensive supportive services, business engagement via quality jobs development, community outreach initiatives, and advancing workforce training partnerships.



The project targets local job seekers, including long-term unemployed, underemployed, low-skilled, additional populations with barriers to employment (e.g., veterans, formerly justice-involved, people with disabilities, women, minorities, etc.), and individuals who previously would have been eligible for the Trade Adjustment Assistance (TAA) program.

Currently NYSDOL is partnering with New York State Department of Transportation (NYSDOT) in developing its I-81 project talent pipeline to identify and include more priority “hire ready” job seekers for its Local Hire Incentive referral program. The project will expand existing work readiness programs and job networks to create a greater “hire ready” applicant pool for approved I-81 contractors, subcontractors, and other employers.

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.

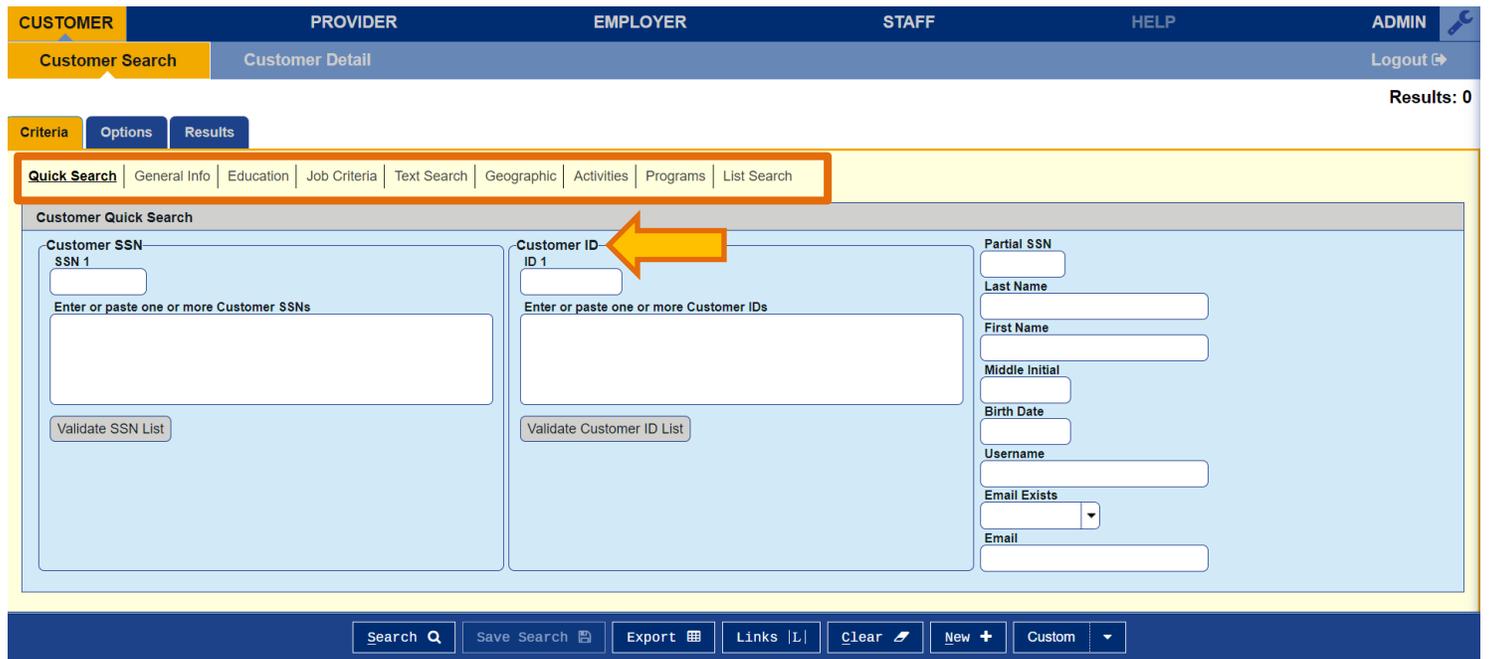
This guide provides instructions on how to conduct the OSOS data entry for the QUEST NDWG project.

## 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 **Criteria** tab, within the **Customer Search** window, in the **Customer** module.

While searches are most commonly performed from the **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 shows the OSOS Customer Search interface. At the top, there is a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP, and ADMIN. Below this is a sub-navigation bar with 'Customer Search' and 'Customer Detail'. The 'Criteria' tab is active, and the 'Quick Search' sub-tab is selected. The 'Customer ID' field is highlighted with an orange arrow. The interface includes fields for Customer SSN, Customer ID, Partial SSN, Last Name, First Name, Middle Initial, Birth Date, Username, Email Exists, and Email. A search bar at the bottom contains buttons for Search, Save Search, Export, Links, Clear, New, and Custom.

## QUICK SEARCH TAB

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 the **Customer's Full** or **Partial Name**.

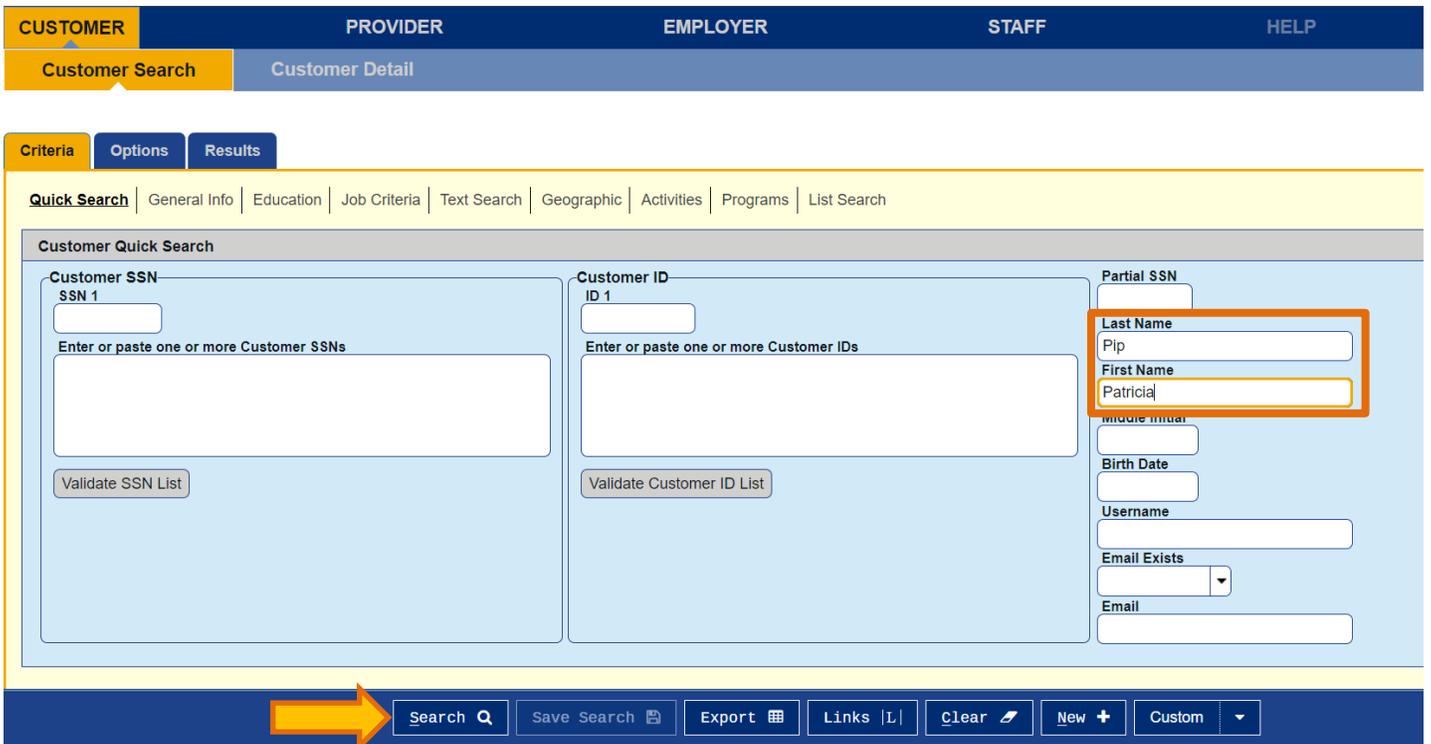
## SEARCHING BY CUSTOMER'S FULL OR PARTIAL NAME

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 email [help.osos@labor.ny.gov](mailto:help.osos@labor.ny.gov) with both record ID's.*

Click the **Search** button.



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 and Customer Detail. The main interface has three tabs: Criteria, Options, and Results. Under the Criteria tab, there are several search options: Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, and List Search. The 'Quick Search' option is selected. The search form is titled 'Customer Quick Search' and contains three main sections: 'Customer SSN', 'Customer ID', and 'Partial SSN'. Each section has a small input field for a single value and a larger text area for multiple values. Below each text area is a 'Validate' button. The 'Partial SSN' section includes fields for Last Name (containing 'Pip'), First Name (containing 'Patricia'), Middle Initial, Birth Date, Username, Email Exists (a dropdown menu), and Email. The 'Last Name' and 'First Name' fields are highlighted with an orange box. At the bottom of the form, there is a row of buttons: Search (with a magnifying glass icon and an orange arrow pointing to it), Save Search, Export, Links, Clear, New, and Custom.



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

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

Customer Info

Customer Data

\*SSN Active \*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.

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"/>	NY01815144	No	Inactive	Pip, Patricia	Inactive	Inactive	Inactive			Inactive	Inactive	
<input type="checkbox"/>	NY018777	No	Inactive	PIP PAT								

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	PIP PAT								

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

1 of 3

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

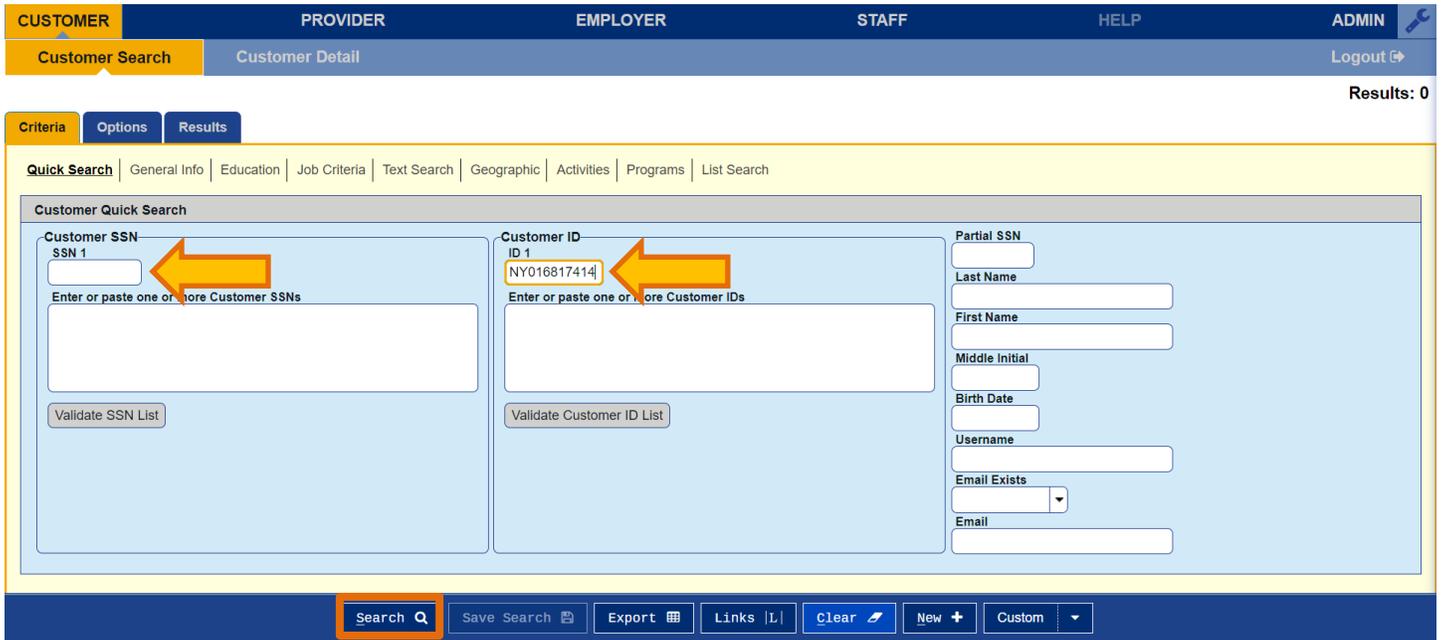
Save Start Match Activity I.A. Referrals Correspond IVR Links Ret To Srch Comments Tag Schedule

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.

Click the **Search** button at the bottom of the screen once the information has been entered.



If there is a matching record, OSOS will display the customer's record. If there is no matching record, the system will display **No Results** in the upper right-hand corner.



*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**

<b>Customer SSN</b> SSN 1 <input type="text"/> Enter or paste one or more Customer SSNs <input type="text"/> <input type="button" value="Validate SSN List"/>	<b>Customer ID</b> ID 1 <input type="text"/> Enter or paste one or more Customer IDs <input type="text"/> <input type="button" value="Validate Customer ID List"/>	<b>Partial SSN</b> <input type="text"/> <b>Last Name</b> <input type="text"/> <b>First Name</b> <input type="text"/> <b>Middle Initial</b> <input type="text"/> <b>Birth Date</b> <input type="text"/> <b>Username</b> <input type="text"/> <b>Email Exists</b> <input type="text"/> <b>Email</b> <input type="text"/>
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Search Save Search Export Links Clear **New** Custom

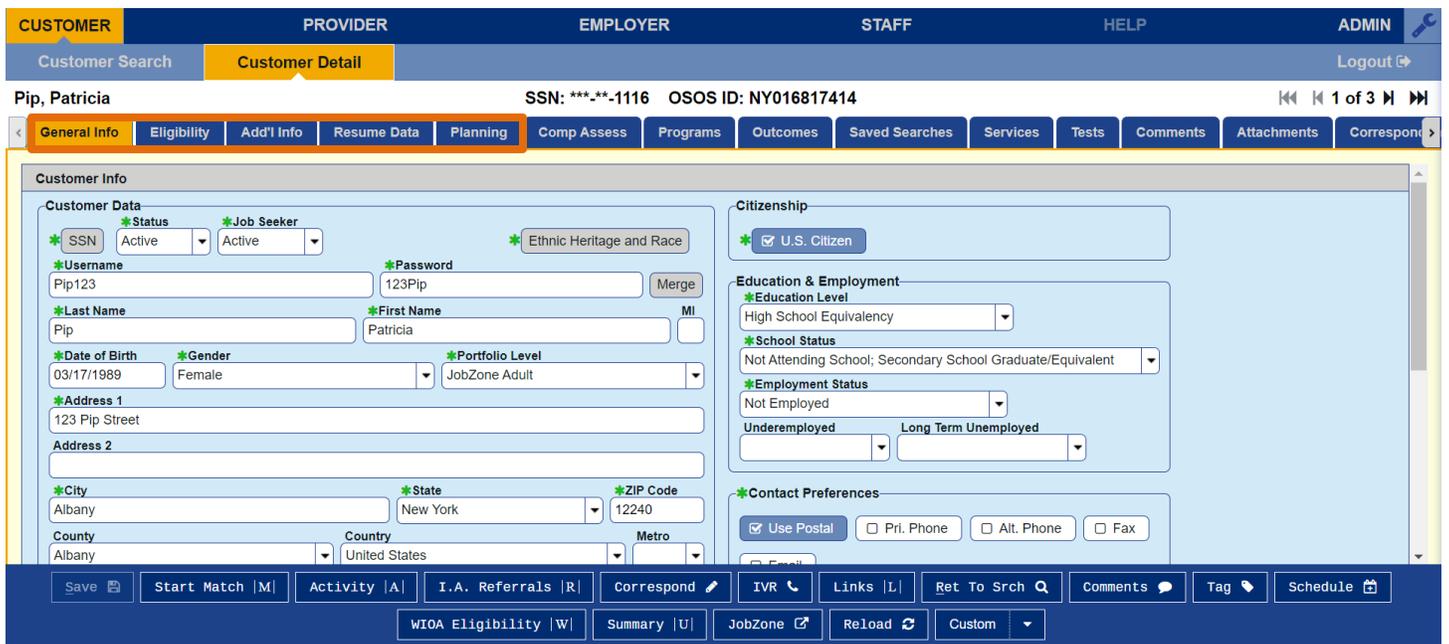
Please click on these links for more detailed information on searching for a customer record <https://dol.ny.gov/system/files/documents/2024/10/osos-performaing-a-customer-search-guide.pdf>

Creating a customer record <https://dol.ny.gov/system/files/documents/2024/10/osos-creating-a-basic-customer-record-guide.pdf>.

## BASIC CUSTOMER RECORD

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

- **General Info** tab (General Information)
- **Eligibility** tab
- **Add'l Info** tab (Additional Information)
- **Resume Data** tab
- **Planning** tab



The screenshot shows the OSOS Customer Detail window for Patricia Pip. The 'General Info' tab is selected and highlighted in orange. The form contains the following fields and sections:

- Customer Data:**
  - \*SSN: Active
  - \*Status: Active
  - \*Job Seeker: Active
  - \*Username: Pip123
  - \*Password: 123Pip
  - \*Last Name: Pip
  - \*First Name: Patricia
  - \*Date of Birth: 03/17/1989
  - \*Gender: Female
  - \*Portfolio Level: JobZone Adult
  - \*Address 1: 123 Pip Street
  - \*City: Albany
  - \*State: New York
  - \*ZIP Code: 12240
  - \*Country: Albany
  - \*Ethnic Heritage and Race: (empty)
- 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: (empty)
  - Long Term Unemployed: (empty)
- Contact Preferences:**
  - Use Postal
  - Pri. Phone
  - Alt. Phone
  - Fax

At the bottom of the form, there are several action buttons: Save, Start Match |M|, Activity |A|, I.A. Referrals |R|, Correspond, IVR, Links |L|, Ret To Srch, Comments, Tag, Schedule, WIOA Eligibility |W|, Summary |U|, JobZone, Reload, and Custom.



*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 to complete a 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 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

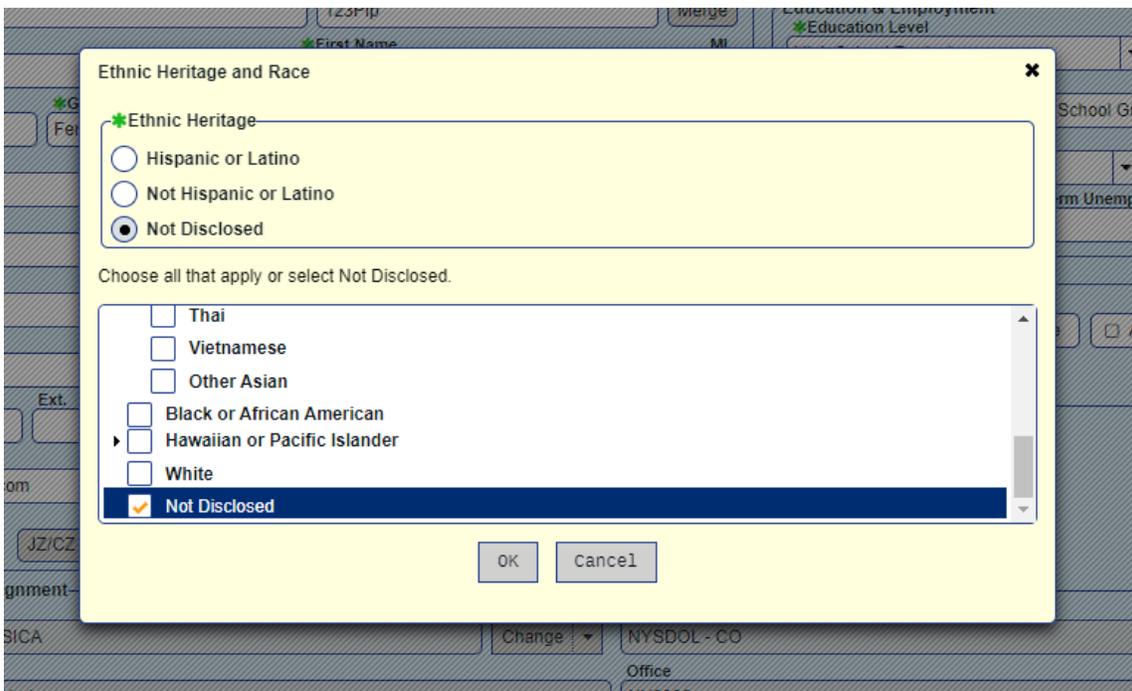
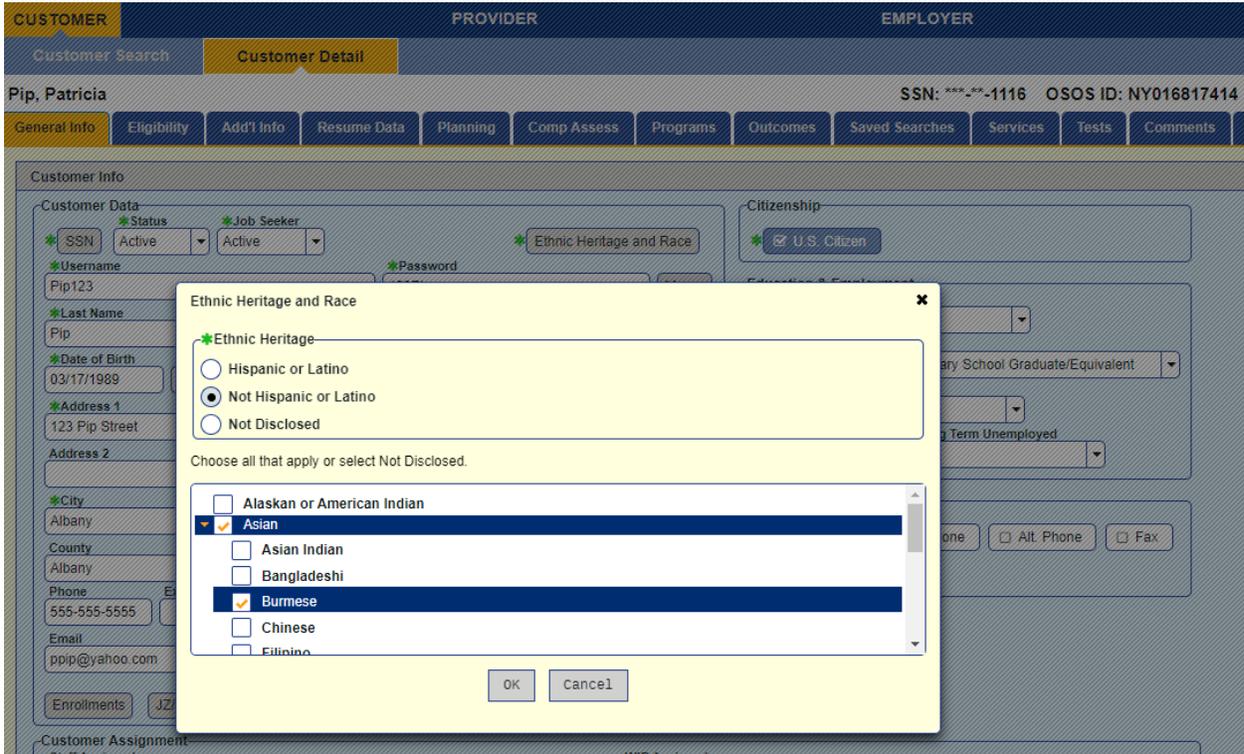
Below are some noteworthy points for filling out the tabs located within the **Customer Detail** window.

### 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 Patricia Pip. The window has tabs for Customer Search, Customer Detail, and others. The Customer Detail tab is active, showing various fields for customer information. A yellow dialog box titled "SSN" is overlaid on the form, prompting the user to enter the Social Security Number (SSN) and confirm it. The dialog box contains two input fields for "SSN" and "Confirm SSN", both containing the value "111-11-1116". There is also a checkbox labeled "Not Disclosed" which is currently unchecked. At the bottom of the dialog box are "Save" and "Cancel" buttons. The background form shows fields for Status (Active), Job Seeker (Active), Ethnic Heritage and Race, Citizenship (U.S. Citizen), and various address and contact information fields.

- 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 a **Portfolio level** set to **JobZone Adult** 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    \*Status: 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

County: Albany    Country: United States

Phone: 555-555-5555    Ext.    Alt. Phone    Ext.    Fax

Email: ppip@yahoo.com    URL    Alt. URL

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|    Ret To Srch Q    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.

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
--------------	-------------	------------	-------------	----------	-------------	----------	----------	----------------	----------	-------	----------

**Additional Info**

**Military Service**  
\*Service Veteran

No

**Employment Preferences**

Work Week:  Duration:

Salary:  Pay Unit:  Date Available:

**Selective Service**  
\*Selective Service?

Not Required

Yes  
No  
Not Required

**Shift Preferences**

Work Any Shift:  Yes  No

First Shift  Second Shift  Third Shift  Rotating Shift

Split Shift

**Customer List Participation**

Office	Staff	List Name	Modified
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

No lists assigned

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

- Navigate to the **Work History** link and select **New Job Entry** to enter a work history for the customer. Enter all required fields and any additional information provided by the customer.

<b>CUSTOMER</b>	<b>PROVIDER</b>	<b>EMPLOYER</b>
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**

<p><b>Job Data</b></p> <p>*Job Title Floral Designer</p> <p>O*Net Code: 27-1023.00    O*Net Title: Floral Designers    O*Net Titles</p> <p>Job Type: Full Time    *Start Date: 05/09/2020    *End Date: 11/09/2020    Present Job: <input type="checkbox"/></p> <p>*Wage: \$ 15.00    *Salary Unit: Hourly    Hours/Week: 37</p> <p>*Reason for Leaving: Quit</p> <p>Work Setting:    Type Customized Employment Services:</p>	<p><b>Employer Data</b></p> <p>*Employer: Flower Power Inc.</p> <p>*Address: 1 Floral Way    Address 2:</p> <p>*City: Anytown    *State: New York    *ZIP Code: 12345</p> <p>*Country: United States</p> <p>Supervisor:    Phone:    Ext.:</p> <p>NAICS:    Title:    NAICS</p> <p>RR Event #:    Event</p>
--	---

**\*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    

Job	Company	City
-----	---------	------


**New Job Entry** +
Delete Selection
Show Resume Usage

Save	Start Match  M	Activity  A	I.A. Referrals  R	Correspond	IVR	Links  L	Ret To Srch	Comments
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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 O\*Net Title  
27-1023.00 Floral Designers O\*Net Titles

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

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

\*Reason for Leaving  
Quit

Work Setting Type Customized Employment Services  
Type Customized Employment Services

**Employer Data**

\*Employer  
Flower Power Inc.

\*Address Address 2  
1 Floral Way

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

\*Country  
United States

Supervisor Phone Ext.  
NAICS Title  
RR Event # Event

**\*Job Duties**

Search/Add Skills | B I U | 1-4 of 4 | 100%

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.

Job Company City

New Job Entry + Delete Selection Show Resume Usage

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

If the customer does not have any Work History, select **No Information Provided**.



There are four required sections (links) within the Resume Data tab; **Certificates/Licenses, Schools, Professional Associations and Skills**. If the customer does not have information to enter in these sections, select **No Information Provided** under each section.



*Once the **Skills** link is completed, and 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.

The screenshot shows the OSOS interface for a customer record. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, and STAFF. The 'CUSTOMER' tab is active, and the 'Customer Detail' sub-tab is selected. The customer name is 'Pip, Patricia', with SSN: \*\*\*-\*\*-1116 and OSOS ID: NY01317414. The 'Comments' tab is highlighted, and a yellow arrow points to it. Below the navigation is a table with columns for 'Created', 'Staff Assigned', and 'Comments'. The table contains two rows of data.

	Created	Staff Assigned	Comments
<input type="checkbox"/>	05/09/2024	DUPUIS, JESSICA	Testing
<input type="checkbox"/>	06/01/2023	DUPUIS, JESSICA	Customer comment test.

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.

## COMPREHENSIVE ASSESSMENT

Information documented in the **Comprehensive Assessment** tab is important for recording the customer's barriers and challenges.

Many of the fields in Comp Assess are used to determine eligibility under WIOA programs. Since the QUEST NDWG is a federally funded program, participants must be co-enrolled in the WIOA programs.

The **Comp Assess** tab is located in the **Customer** module, **Customer Detail** window.



*When information is entered into the Comprehensive Assessment tab, all required data fields (as indicated by a green asterisk) in each link 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
Employment	Education	Financial	Family	Health	Treatments
Legal	Housing	Transportation			
<b>Employment</b>					
Origination Date: 06/01/2023 Last Update: 06/01/2023 Staff Assigned: DUPUIS, JESSICA		<b>Job Behavior and Skills—</b> Employment Behavior			
<b>Employment Objective—</b> Job Title: Fashion Designers Wage Desired: _____ Per Hourly		Job Seeking Skills			
<b>Geographical Location—</b> Within 25 miles of 12240		Job Keeping Skills			
Is the customer interested in non-traditional Employment? <input type="radio"/> Yes <input type="radio"/> No		Summary of Occupational Strengths and Weaknesses			
Current Employment Status: Not Employed		<input type="button" value="View Employment History"/>			
<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="Ret 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 QUEST NDWG. Staff should always enter as much information as known about the customer to better serve and meet their needs.

#### **Employment link**

- **Cultural Barriers to Employment:** This information is collected as a requirement under WIOA.

#### **Education link**

- **Basic Skills Deficient/Low Levels of Literacy:** This is assessed based on the results of established, approved assessment. 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 the customer is considered an **Other Family Member** or select **Not Disclosed**.

**Health link** and **Treatments 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**

- **Current Housing** - Select the option that most closely reflects the customer's current housing status.

### **Transportation link**

- There is no required information located in this tab. However, if the customer discloses that they have a driver's license or transportation information, enter as much information as provided into these sections.



## SERVICES

Staff use the **Services** tab in the **Customer Detail** window of OSOS to record the services provided to the customer.

### ENTERING THE SERVICE

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

**CUSTOMER** | PROVIDER | EMPLOYER

Customer Search | **Customer Detail**

Pip, Patricia | SSN: \*\*\*-\*\*-1111 | 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: 145741 | Service Name: New Training | Service Type: Occupational Skills Training

Service Description: New Training | Add'l Service Info

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

Select the **New Service** button.

O\*Net | Title | NAICS | Title | In

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 | [Navigation icons] | 100

	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 | [Navigation icons] | 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| | Get To Srch | | Comments |



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

The screenshot displays the OSOS interface with the following elements:

- Top Navigation Bar:** Divided into three sections: **CUSTOMER**, **PROVIDER** (highlighted in yellow), and **EMPLOYER**.
- Second Level Navigation:** Under **PROVIDER**, there are four options: **Provider Search** (highlighted in yellow), **Provider Detail**, **Offering Search** (highlighted in yellow), and **Offering Detail**.
- Criteria Tab:** Below the navigation bar, there are three tabs: **Criteria** (highlighted in yellow), **Options**, and **Results**.
- Quick Search Section:** Under the **Criteria** tab, there are three links: **Quick Search** (highlighted in yellow), **General Info**, and **List Search**.
- Offering ID Section:** Below the links, there is a section titled **Offering ID** with a sub-label **ID 1** and a text input field. Below this is a larger text area with the prompt "Enter or paste one or more Offering IDs" and a **Validate Offering ID List** button.

Verify the correct **WIB** is selected.

Click the **Service Type** button to bring up a new webpage dialog box. Select the corresponding **Service Type** being provided to the participant and click **Select**.

<b>CUSTOMER</b>	<b>PROVIDER</b>	<b>EMPLOYER</b>
Provider Search	Provider Detail	Offering Search

Criteria
Options
Results

Quick Search | General Info | List Search

**General Info**

Location- WIB

City

Start Date Range-  
 From  To

**Provider Information**

Provider Name  Service Name  Service Program

Provider Status  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

Select Seeker Service Type
✕

- ▼ L2 Training
  - ▼ Occupational Skills Training Element
    - Occupational Skills Training
  - ▼ L2 WIOA Youth Services
    - ▼ Occupational Skills Training Element
      - Occupational Skills Training

Keyword(s)  
  
 Search  
 Reset  
 Select  
 Clear  
 Cancel ✕

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: Occupational Skills Training    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

The search results will be presented in the **Results** tab.

**CUSTOMER**      **PROVIDER**      **EMPLOYER**      **STAFF**      **HELP**      **ADMIN**

Provider Search    Provider Detail    **Offering Search**    Offering Detail    Logout

Criteria    Options    **Results**    Results: 52

1-52 of 52    1    100

<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>	XYZ Teeth	New Training	XYZ Teeth				
<input type="checkbox"/>	Veterans Bill of Rights	Occ Skis Trng -- Veterans Bill of Rights	Statewide - ICS (DVOP)				
<input type="checkbox"/>	UI 599 Program	Occupational Skills Training - non-DOL	UI 599 Program				



Select the appropriate service that is being provided and click **Schedule**.

<input type="checkbox"/>	Amer. Inst. for Chart. Property Casualty Underwriters & Insur. Inst. of America	Associate in Claims (AIC)	Amer. Inst. for Chart. Property Casualty Underwriters & Insur. Inst. of America	07/22/2002	
<input checked="" type="checkbox"/>	Abc Welding	Welding	Anywhere		
<input type="checkbox"/>	ABC Trainer	test training	Building A 2nd Floor	11/01/2023	11/10/2023
<input type="checkbox"/>	ABC Trainer	Training Basics	Building A		
<input type="checkbox"/>	ABC	New Training	Office Building		
<input type="checkbox"/>	ABC	test	Office Building		
<input type="checkbox"/>	ABC	test	Office Building		

1-52 of 52

This brings you to the **Customer** module, **Customer Detail** window, **Services** tab.

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 service provided is ongoing, do not enter an **Actual End Date** until the service is complete. 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: NY0168174

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
	Welding	Occupational Skills Training
Service Description		
ETP Auto load 05/01/2022 <span style="float: right;">Add'l Service Info</span>		
Provider ID	Provider Name	Location Name
92644	Abc Welding	
Offering ID		146273
Plan. Start	Plan. End	Program
01/01/2020	05/01/2021	
Act. Start	Act. End	Achievement Objective
01/01/2020		
Completed	Next Contact	Program Service Type
Pt Time Lrn.	Distance Lrn.	Min. Hours
		Nbr. Weeks
		Min. Prog. Agreed
O*Net	Title	NAICS
WIB	Agency	Office
NYSDOL - CO	Department of Labor	NY9999
Staff Assigned	Change	Orig. Oblig.
		Total Oblig.
		Offering Cost
		\$ 1.00
		Actual Cost

1-5 of 5

	Provider Name	Service Name	Actual Start Date
<input 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
<input checked="" type="checkbox"/>	Abc Welding	Welding	

1-5 of 5

Options
Print List
New Service
Delete Service
Authorization
IPA Service

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



Many services may be provided in one day. If this is the case, enter the same date in all four date fields and select the appropriate option on the **Completed Successfully** drop-down menu. If a training spans over a course of time beyond one day, then you will select **Completed Successfully** (yes/no) once the training has ended.

Choose an appropriate **Program Service Type**. This will vary based on the service provided. If you are recording an occupational skills training, select **ITA-Training**. If you are recording an On-the-Job training, select **Non-ITA Training**. Other services will be recorded as either **Basic Career Services** (for example, assessment or career guidance) or **Individualized Career Services** (for example, supportive services.)

If you are recording a training service, select the **O\*Net Title** which corresponds to the training. You will also need to indicate if the training is part-time (yes/no) and if the training is offered via distance learning (yes/no.)

Click the **Save** button.

CUSTOMER
PROVIDER
EMPLOYER

Customer Search
Customer Detail

**Pip, Patricia** SSN: \*\*\*-\*\*-1116 OSOS ID: NY0168174

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
	Welding	Occupational Skills Training
Service Description		
ETP Auto load 05/01/2022 <span style="float: right;">Add'l Service Info</span>		
Provider ID	Provider Name	Location Name
92644	Abc Welding	
		Offering ID
		146273
Plan. Start	Plan. End	Program
01/01/2020	05/01/2021	
Act. Start	Act. End	Completed
01/01/2020		
		Next Contact
		06/01/2020
		Program Service Type
		ITA-Training
Pt Time Lrn.	Distance Lrn.	Min. Hours
		Nbr. Weeks
		Min. Prog. Agreed
O*Net	Title	O*Net
		NAICS
WIB	Agency	Office
NYSDOL - CO	Department of Labor	NY9999
		<span>Change Office</span>
Staff Assigned	Orig. Oblig.	Total Oblig.
		Offering Cost
		\$ 1.00
		Actual Cost

1-5 of 5 1

	Provider Name	Service Name	Actual Start Date
<input 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
<input checked="" type="checkbox"/>	Abc Welding	Welding	

1-5 of 5 1

Options Print List New Service Delete Service Authorization IPA Service

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

Next, you will attach the funding. This is done in the Funding side of the Services link, on the right side of the screen.

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 | Audit

Activities | **Services** | History

**Detail**

Service ID: 145740 | Service Name: Welding | Service Type: Occupational Skills Training

Service Description: ETP Auto load 05/01/2022

Provider ID: 02044 | Provider Name: Abc Welding | Location Name: Anywhere | Offering ID: 146273

Plan. Start: 01/01/2020 | Plan. End: 05/01/2021 | Program: [dropdown] | Achievement Objective: [dropdown]

Act. Start: 01/01/2020 | Act. End: 04/20/2021 | Completed: Yes | Next Contact: 09/01/2020 | Program Service Type: ITA-Training

Pt Time Lm: [dropdown] | Distance Lm: [dropdown] | Min. Hours: [input] | Nbr. Weeks: [input] | Min. Prog. Agreed: [input]

O\*Net: [input] | Title: [input] | NAICS: [input] | Title: [input] | NAICS: [input]

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

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

**Funding**

Level	Source	Obligated	Actual	Oblig #
[input]	[input]	[input]	[input]	[input]

No records found.

Total Funding: [input] | Petition #: [dropdown]

Incumbent Worker Training: [dropdown] | RR Event #: [dropdown]

1-4 of 4 | [input] | [input] | [input] | [input] | [input]

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
Abc Welding	Welding	01/01/2020	04/20/2021	ITA-Training

Enter 1 into the **Total Funding** field. Then click the **Add** button.

**Funding**

Level	Source	Obligated	Actual	Oblig #
[input]	[input]	[input]	[input]	[input]

No records found.

↓

Total Funding:  | Petition #: [dropdown]

Incumbent Worker Training: [dropdown] | RR Event #: [dropdown]

←

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

Select the **Quest NDWG** funding.

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

Click **OK**.

<input type="checkbox"/>	WIB	Adult Statewide 15%	2021	99999	
<input 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	99991	
<input checked="" type="checkbox"/>	WIB	QUEST NDWG	2023	100000	NY20

Obligated Amount  
1.00

Obligated Percentage OR  
100.00

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	QUEST NDWG	1		116121

Total Funding

Petition #

Incumbent Worker Training

RR Event #

Add
Edit
Delete

CUSTOMER PROVIDER EMPLOYER STAFF HELP ADMIN
Logout

Customer Search Customer Detail
SSN: \*\*\*\*-\*\*-1116 OSOS ID: NY016817414

General Info Eligibility Add'l Info Resume Data Planning Comp Assess Programs Outcomes Saved Searches Services Tests Comments Attachments Correspondence Audit
1 of 1

Activities Services History

**Detail**

Service ID: 145740 Service Name: Welding Service Type: Occupational Skills Training

Service Description: ETP Auto load 05/01/2022

Provider ID: 92644 Provider Name: ABC Welding Location Name: Anywhere Offering ID: 140273

Plan. Start: 01/01/2020 Plan. End: 05/01/2021 Program: [dropdown] Achievement Objective: [dropdown]

Act. Start: 01/01/2020 Act. End: 06/01/2020 Next Contact: [dropdown] Program Service Type: ITA-Training

PI Time Lm.: [dropdown] Distance Lm.: [dropdown] Min. Hours: [input] Nbr. Weeks: [input] Min. Prog. Agreed: [input]

O'Net: [input] Title: [input] NAICS: [input] Title: [input] NAICS: [input]

WIB: NYSDDL - CO Agency: Department of Labor Office: NY9999 Change Office

Staff Assigned: DUPUIS, JESSICA Change

Orig. Oblig.: [input] Total Oblig.: [input] Offering Cost: \$ 1.00 Actual Cost: [input]

**Funding**

	Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WIB	QUEST NDWG	1		116121

Total Funding

Petition #

Incumbent Worker Training

RR Event #

Add
Edit
Delete

1-5 of 5

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	ABC	New Training			
<input type="checkbox"/>	ABC	New Training			
<input type="checkbox"/>	ABC Ducks	New Training	05/09/2024		ITA-Training
<input type="checkbox"/>	ional Alignment PY 2006	Job Referral	06/01/2023	06/01/2023	Basic Career Svcs - Staff Assisted
<input checked="" type="checkbox"/>	Welding	Welding	01/01/2020		ITA-Training

1-5 of 5

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking Show Audit Custom
Save Start Match Activity I.A. Referrals Correspond IVR Links Get To Srch Comments Tag Schedule WIOA Eligibility Summary Jobzone Reload Custom



## CLOSING A SERVICE

It is important that an **Actual End Date** is added to a service when the service 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.

CUSTOMER
PROVIDER
EMPLOYER

Customer Search
Customer Detail

**Pip, Patricia** SSN: \*\*\*-\*\*-1116 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
145740	Welding	Occupational Skills Training
Service Description		
ETP Auto load 05/01/2022 <span style="float: right;">Add'l Service Info</span>		
Provider ID	Provider Name	Location Name
92644	Abc Welding	Anywhere
Plan. Start	Plan. End	Program
01/01/2020	05/01/2021	
Act. Start	Act. End	Completed
01/01/2020		
Pt Time Lrn.	Distance Lrn.	Min. Hours
O*Net	Title	NAICS
WIB	Agency	Office
NYSDOL - CO	Department of Labor	NY9999
Staff Assigned	Orig. Oblig.	Total Oblig.
DUPUIS, JESSICA <span style="float: right;">Change</span>		
	Offering Cost	Actual Cost
	\$ 1.00	

1-5 of 5 1

	Provider Name	Service Name	Actual Start Date
<input 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
<input checked="" type="checkbox"/>	Abc Welding	Welding	01/01/2020

1-5 of 5 1



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

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

**CUSTOMER** PROVIDER EMPLOYER

Customer Search Customer Detail

Pip, Patricia SSN: \*\*\*-\*\*-1116 OSOS ID: NY0168174

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

Activities **Services** History

**Detail**

Service ID: 145740 Service Name: Welding Service Type: Occupational Skills Training

Service Description: ETP Auto load 05/01/2022 Add'l Service Info

Provider ID: 92644 Provider Name: Abc Welding Location Name: Anywhere Offering ID: 146273

Plan. Start: 01/01/2020 Plan. End: 05/01/2021 Program: Achievement Objective

Act. Start: 01/01/2020 Act. End: 04/20/2021 Completed: Yes Next Contact: 06/01/2020 Program Service Type: ITA-Training

Pt Time Lrn. Distance Lrn. Min. Hours Nbr. Weeks Min. Prog. Agreed

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

1-5 of 5

	Provider Name	Service Name	Actual Start Date
<input 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
<input checked="" type="checkbox"/>	Abc Welding	Welding	01/01/2020

1-5 of 5

Options Print List New Service Delete Service Authorization IPA Service

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



## OUTCOMES

QUEST participants will be co-enrolled with WIOA and will be included in applicable Local Area Performance measures. **Employment** and **Training** outcomes for QUEST NDWG grant participants must be recorded in the **Outcomes** tabs of OSOS.

### TRAINING OUTCOMES

When a participant has enrolled in training, it must be noted in the **Training Outcomes** link within the **Outcomes** tab in the **Customer Detail** window.

Click the **Add Outcome** button at the bottom of the screen.

The screenshot displays the OSOS interface for the 'Outcomes' tab. At the top, a navigation bar includes 'General Info', 'Eligibility', 'Add'l Info', 'Resume Data', 'Planning', 'Comp Assess', 'Programs', 'Outcomes', 'Saved Searches', 'Services', 'Tests', 'Comments', 'Attachments', and 'Correspondence'. Below this, the 'Employment Outcomes' section is active, with 'Training Outcomes' selected. The main area contains a form for entering training details, including fields for Category, Type, Enroll Date, Completion Date, Attainment Status, Certification Date, Leads to Cred./Empl., Major/Program, Degree/Cert./Cred., School/Institute, Seeker Service ID, and Seeker Service Name. A 'Participations' button is visible next to the Enroll Date and Completion Date fields. Below the form, a table with columns for Type, School/Institute, and Enroll Date is shown, but it contains no records. At the bottom of the screen, a blue bar contains several buttons: 'Add Outcome', 'Delete Outcome', 'Outcome Details', 'Print List', and 'Show Audit'. A large orange arrow points to the 'Add Outcome' button.



Enter the **Category** and **Type** of the Credential being worked toward in training.

Enter the **Enroll Date** of the training.

Enter the **Attainment Status** of "In Process - intended credential pending."

Enter the **Certification Date**, the **Major/ Program**, the **Degree/Certificate/Credential** obtained, and the **School/Institute** which will grant the credential.

Click **Save**.

Training/Education

\*Category  
 Occ Skills/Advanced Training

\*Type  
 Occupational Skills Certificate

\*Enroll Date  
 06/30/2024

Completion Date  
 [Participations] [Participations]

\*Attainment Status  
 In Process - intended credential pending

Certification Date  
 [ ]

Leads to Cred./Empl.  
 [ ]

Major/Program  
 Welding

Degree/Cert./Cred.  
 Certification

School/Institute  
 ABC Welding

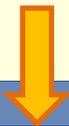
Seeker Service ID  
 [ ]

Seeker Service Name  
 [ ]

Training Services

Type	School/Institute	Enroll Date	Attainment Status
<input type="checkbox"/> On the Job Training	ABC	05/01/2023	Completed - did not attain or intend credential
<input checked="" type="checkbox"/> Occupational Certification	OCM BOCES	02/01/2024	In Process - intended credential pending

1-2 of 2 [Navigation icons]



[Add Outcome](#)
[Delete Outcome](#)
[Outcome Details](#)
[Print List](#)
[Show Audit](#)

[Save](#)
[Start Match |M|](#)
[Activity |A|](#)
[I.A. Referrals |R|](#)
[Correspond](#)
[IVR](#)
[Links |L|](#)
[Get to Srch](#)
[Comments](#)
[Tag](#)
[Schedule](#)
[WIOA Eligibility |W|](#)
[Summary |U|](#)
[JobZone](#)
[Reload](#)



To record Measurable Skill Gains throughout the training, click the **Outcome Details** button.

Type	School/Institute	Enroll Date	Attainment Status
<input type="checkbox"/> On the Job Training	ABC	05/01/2023	Completed - did not attain or intend credential
<input checked="" type="checkbox"/> Occupational Certification	OCM BOCES	02/01/2024	In Process - intended credential pending

1-2 of 2

Buttons: Add Outcome, Delete Outcome, Outcome Details, Print List, Show Audit

Bottom navigation: Save, Start Match, Activity, I.A. Referrals, Correspond, IVR, Links, Ret to Srch, Comments, Tag, Schedule, WIOA Eligibility, Summary, Jobzone, Reload

This will open the **Training Outcome Details Webpage Dialog**.

Click **Add**.

Enter the **Effective Date** of the skill gain. Select the **Type** of skill gain.

Use the **Other Text** field or the **Notes** field to provide additional information about the skill gain.

Click **OK**.

Training Outcome Details

Type: On the Job Training

Completion Date: 06/30/2024

**Effective Date**: [Field]

Participations: [Field] Still Enrolled?: [Dropdown]

Hours Per Week: [Field] Part-time: [Field] Salary: [Field] Salary Unit: [Field]

**Skill Gain Type**: Skills Progression

Benchmark Exam: [Field]

Other Text: [Field]

Contact Info: Date: [Field] Name: [Field] Role: [Field] Method: [Field]

Attachment: Upload, Download, Delete

Notes: [Field]

1-1 of 1

Effective Date	Still Enrolled?	Skill Gain Type
		Skills Progression

1-1 of 1

Buttons: Add, Delete, Print List

Buttons: OK, Cancel



When the training has been completed, the **Training Outcome** must be ended.

Enter the **Completion Date** of the training.

Update the **Attainment Status** to reflect the accurate outcome of the training.

If the intended credential was attained, enter the **Certification Date** of the credential.

Click **Save**.

Training/Education

\*Category  
Occ Skills/Advanced Training

\*Type  
Occupational Skills Certificate

\*Enroll Date  
06/30/2024

Participations

Completion Date  
06/30/2025

Participations

\*Attainment Status  
Completed - attained intended credential

Certification Date  
06/30/2025

Leads to Cred./Empl.  
Yes

Major/Program  
Welding

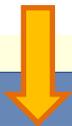
Degree/Cert./Cred.  
Certification

School/Institute  
ABC Welding

Seeker Service ID

Seeker Service Name

Training Services



Add Outcome Delete Outcome Outcome Details Print List Show Audit

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



## EMPLOYMENT OUTCOMES

When a participant obtains employment, this must be recorded in the **Employment Outcomes** link in the **Outcomes** tab of OSOS.

Click the **Add Outcome** button at the bottom of the screen.

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

**Employment Outcomes** | Training Outcomes | Legacy Outcomes

Employment  
\*Type  Start Date  Participations

End Date  Participations Employer EIN/ID  Employer Lookup

Employer Name

NAICS  Title  NAICS Lookup

City  State  ZIP Code

OSOS Job ID  External Job ID  Supervisor

Seeker Service ID  Seeker Service Name  Employment Services

Manual Wages

Characteristics  
Training-Related

Non-Traditional

Hired By Layoff

FCJL Job

Work-Based Training

Disaster Relief

UI Covered

Fringe Benefits

0-0 of 0  100

Start Date  Employer Name  Employer EIN/ID

No records found.

0-0 of 0  100

**Add Outcome** | Delete Outcome | Outcome Details | Print List | Show Audit





Required fields in this tab are **Type** and **Start Date**, but you should enter as much information as is known about the employment.

Please note the Characteristics section at the right of the screen. If the employment is related to training provided to the customer, remember to mark **Training Related** as **Yes**.

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

Employment Outcomes | Training Outcomes | Legacy Outcomes

**Employment**

\*Type: Unsubsidized Employment | Self Employed:

\*Start Date: 02/28/2024 | End Date:

Employer EIN/ID: NY010106666 | Employer Name: ABC

NAICS: 23819 | Title: Other Foundation, Structure, and Building Exterior Contractors

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

OSOS Job ID:  | External Job ID:  | Supervisor:

Seeker Service ID:  | Seeker Service Name:

Manual Wages:

**Characteristics**

Training-Related: Yes

Non-Traditional: No

Hired By Layoff: No

FCJL Job: No

Work-Based Training: No

Disaster Relief: No

UI Covered: Yes

Fringe Benefits: No

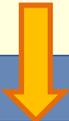
	Start Date	Employer Name	Employer EIN/ID
<input checked="" type="checkbox"/>	02/28/2024	ABC	NY010106666
<input type="checkbox"/>			

1-2 of 2 | 100

1-2 of 2 | 100

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

**Add Outcome** | **Delete Outcome** | **Outcome Details** | **Print List**



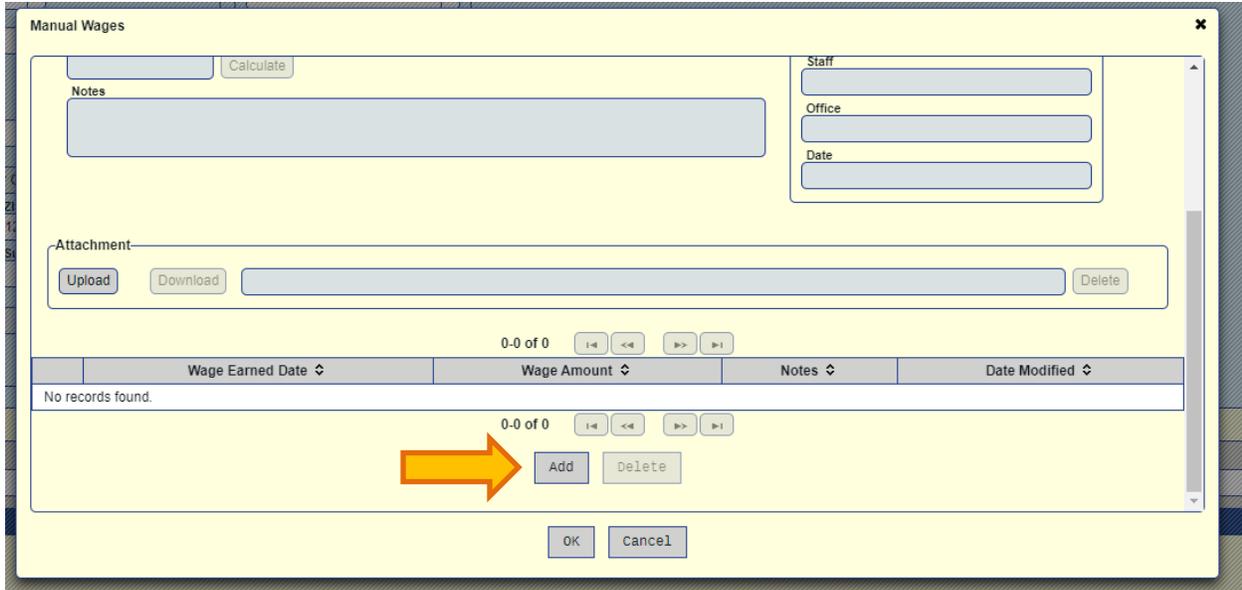


When the participant wages are known, they must be entered into OSOS.  
Click the **Manual Wages** button in the Employment Outcomes tab.

Employment			Characteristics	
*Type	Unsubsidized Employment	Self Employed	Training-Related	Yes
*Start Date	02/28/2024	End Date	Non-Traditional	No
Employer EIN/ID	NY010106666	Employer Lookup	Hired By Layoff	No
Employer Name	ABC		FCJL Job	No
NAICS	23819	Title	Work-Based Training	No
		Other Foundation, Structure, and Building Exterior Contractors	Disaster Relief	No
City	Anytown	State	UI Covered	Yes
		New York	Fringe Benefits	No
OSOS Job ID		External Job ID		
Seeker Service ID		Supervisor		
Seeker Service Name	Employment Services			
<b>Manual Wages</b>				

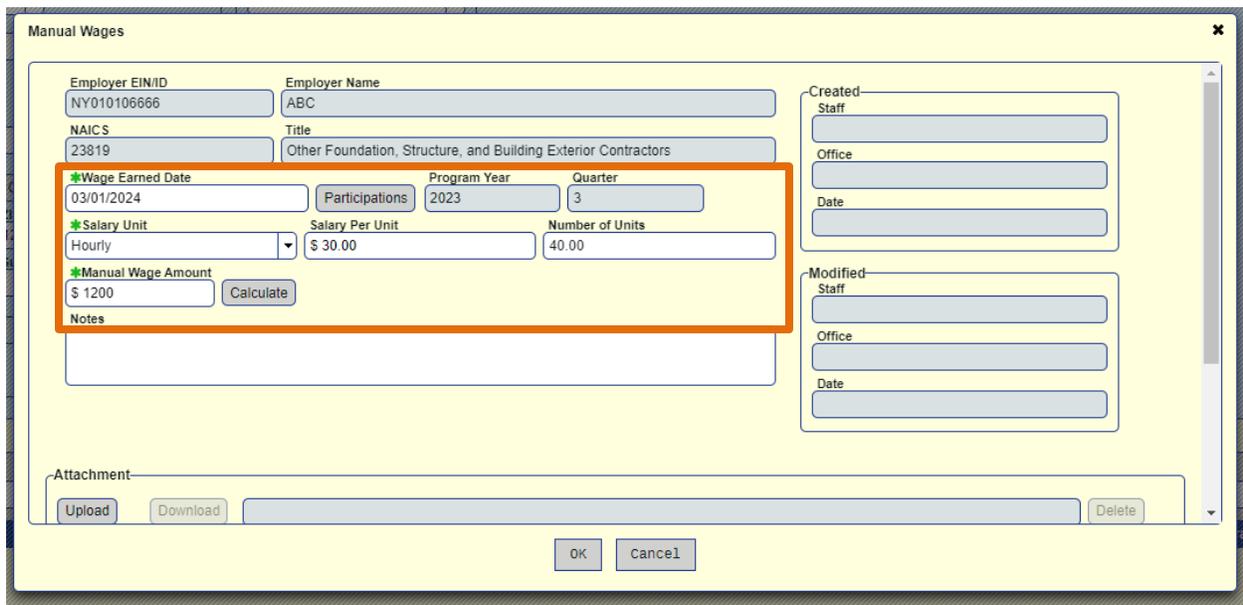


This opens the **Manual Wages** webpage dialog box.  
 Scroll down. Click **Add** to open up the fields.



The screenshot shows the 'Manual Wages' dialog box with a table containing no records. A red arrow points to the 'Add' button below the table. The table headers are 'Wage Earned Date', 'Wage Amount', 'Notes', and 'Date Modified'. The table content is empty, showing '0-0 of 0' records.

Enter the date of the paycheck or **Wage Earned Date**.  
 Enter the **Salary Unit**, the **Salary per Unit**, and the **Number of Units**.  
 Click the **Calculate** button.  
 Click the **OK** button.



The screenshot shows the 'Manual Wages' dialog box with the input fields highlighted by a red box. The fields are:
 

- Employer EIN/ID: NY010106666
- Employer Name: ABC
- NAICS: 23819
- Title: Other Foundation, Structure, and Building Exterior Contractors
- Created Staff: (empty)
- Office: (empty)
- Date: (empty)
- Modified Staff: (empty)
- Office: (empty)
- Date: (empty)
- \*Wage Earned Date: 03/01/2024
- Participations: (empty)
- Program Year: 2023
- Quarter: 3
- \*Salary Unit: Hourly
- Salary Per Unit: \$ 30.00
- Number of Units: 40.00
- \*Manual Wage Amount: \$ 1200
- Calculate button
- Notes: (empty)
- Attachment: (empty)
- Upload, Download, Delete buttons
- OK, Cancel buttons



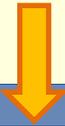
Remember to click **Save** at the bottom of the screen.

Start Date	Employer Name	Employer EIN/ID	NAICS
02/28/2024	ABC	NY010106666	Other Foundation, Structure, and Building Exterior Contractors

1-1 of 1

Save Add Outcome Delete Outcome Outcome Details Print List Show Audit

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





## RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found here  
[https://dol.ny.gov/workforce-professionals-tools?f%5B0%5D=filter\\_term%3A811](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](mailto:help.osos@labor.ny.gov)