QUEST NDWG
OSOS Guide

TABLE OF CONTENTS

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.
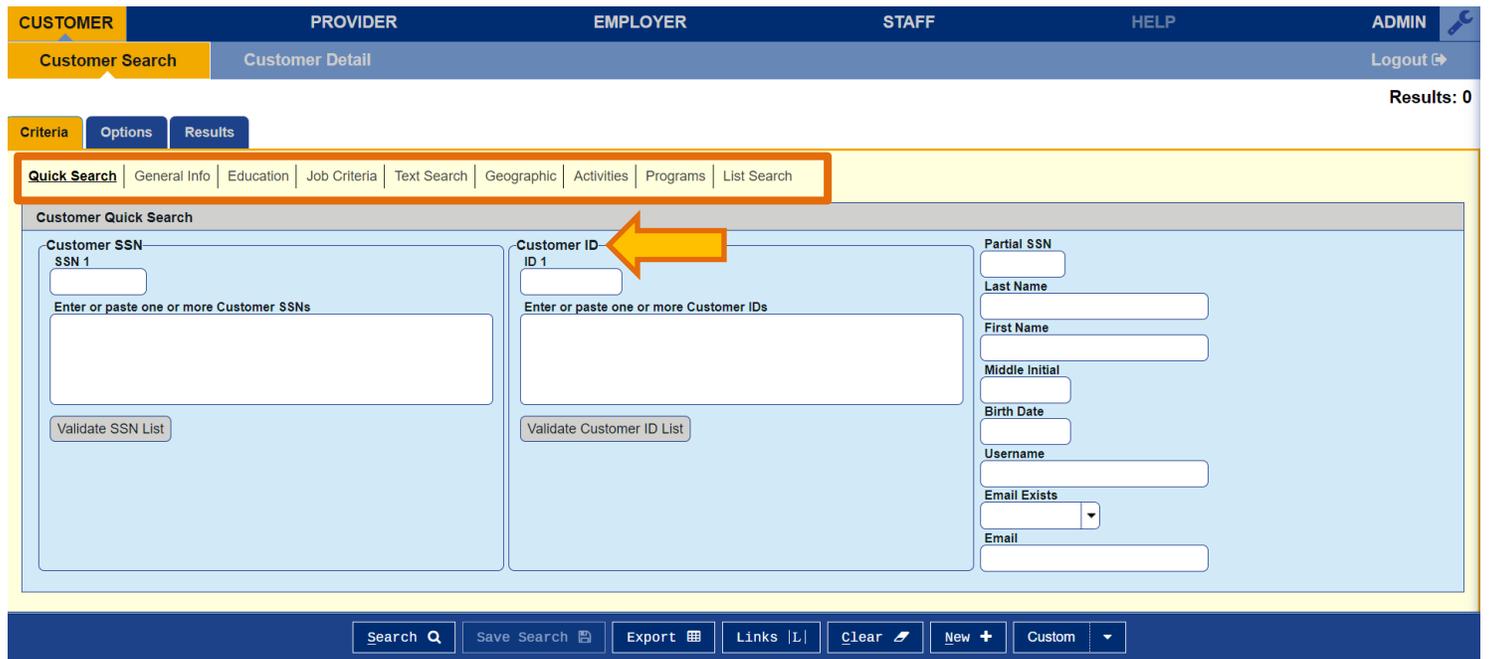
QUICK SEARCH TAB

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 with both record ID's.

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.

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

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.

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.

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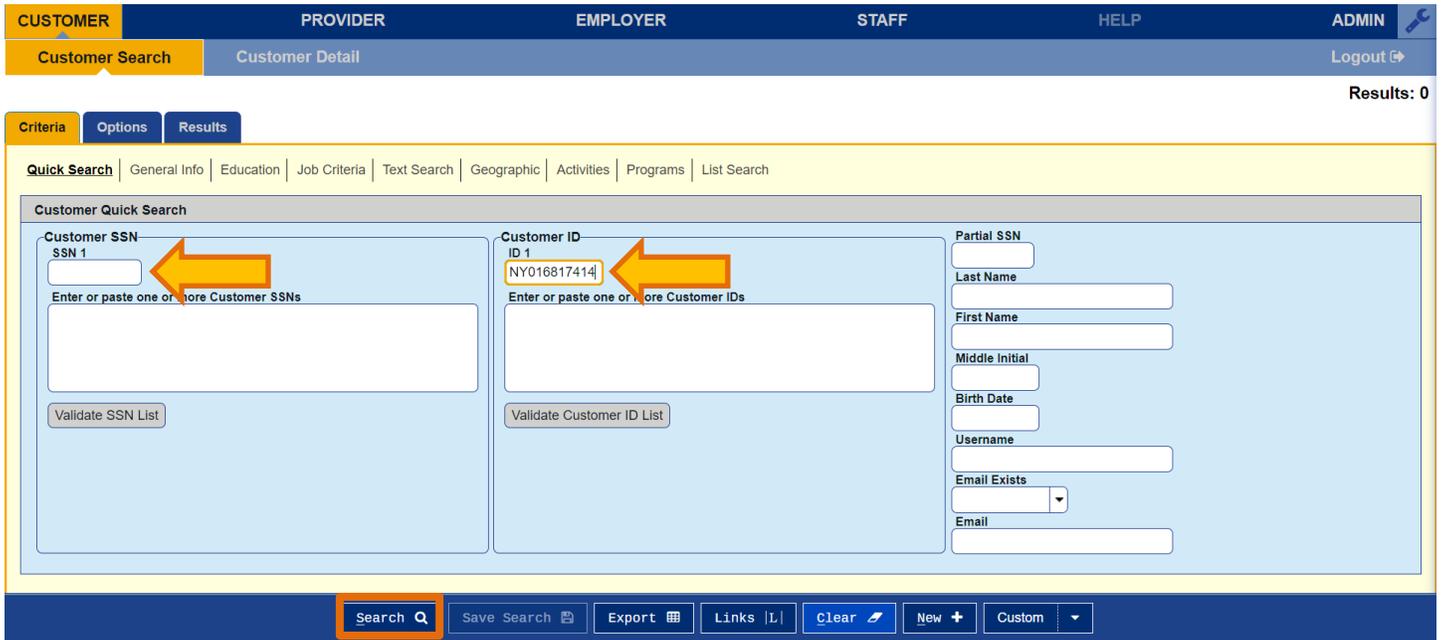
If there is a matching record, OSOS will display the customer's record. If there is no matching record, the system will display **No Results** in the upper right-hand corner.

*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.*

![OSOS One-Stop Operating System logo]

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

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

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.

- **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**.
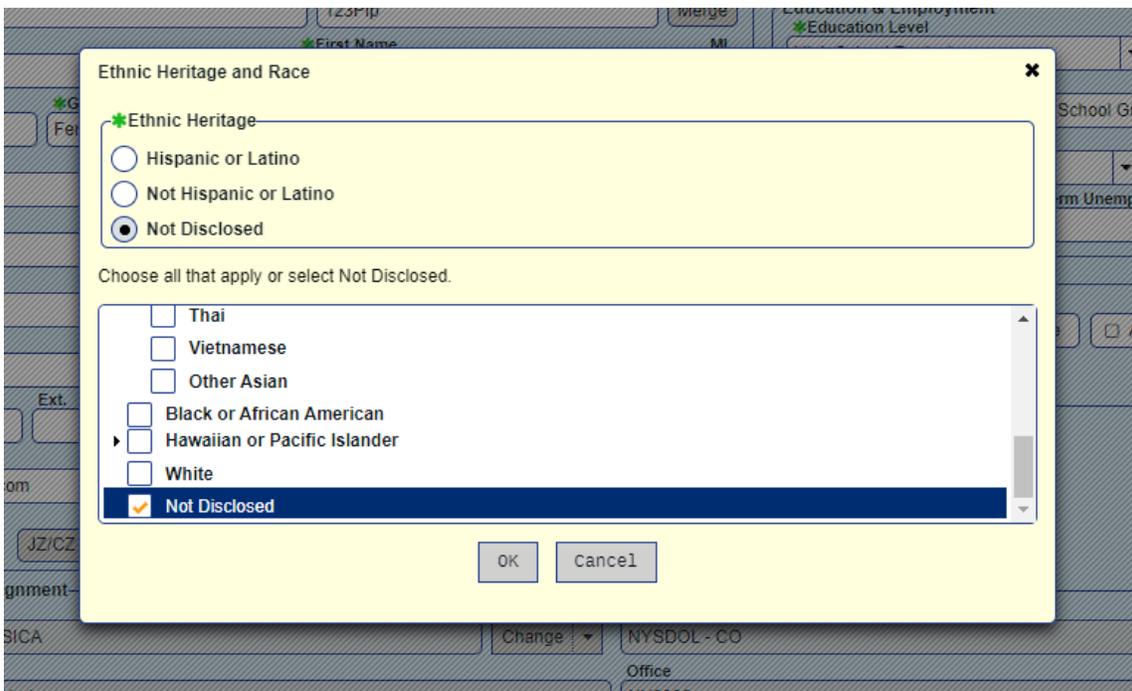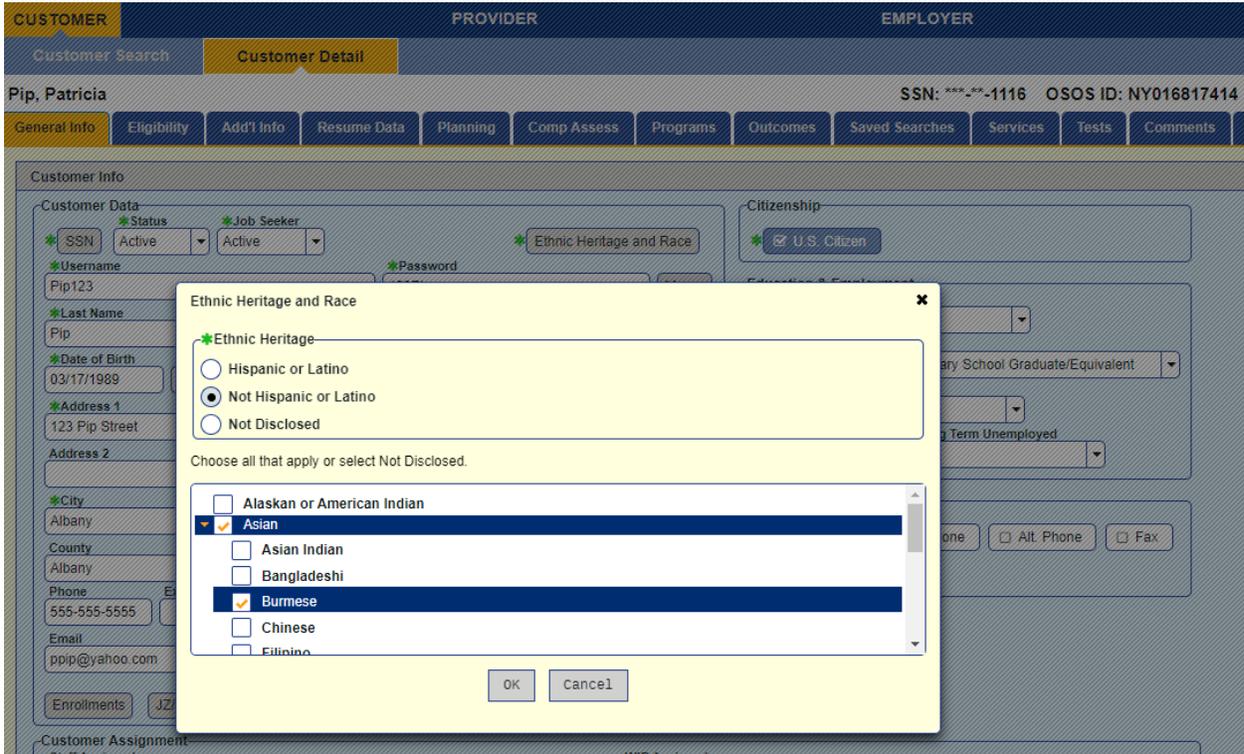
- **Portfolio Level** - A new record will default to **JobZone Adult**.

- **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.

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**.

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.

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

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.

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.

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.

Select the **New Service** button.

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

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**.

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

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

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

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.

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.

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

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

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**.

☐	WIB	Adult Statewide 15%	2021	99999	
☐	WIB	Adult Statewide 15%	2022	100000	
☐	WIB	Adult Statewide 15%	2023	100000	
☐	State	DHP State Funded	2023	99991	
☑	WIB	QUEST NDWG	2023	100000	NY20

Obligated Amount
1.00

OR

Obligated Percentage
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.

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.

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

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

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.

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**.

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

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**.

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**.

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.

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**.

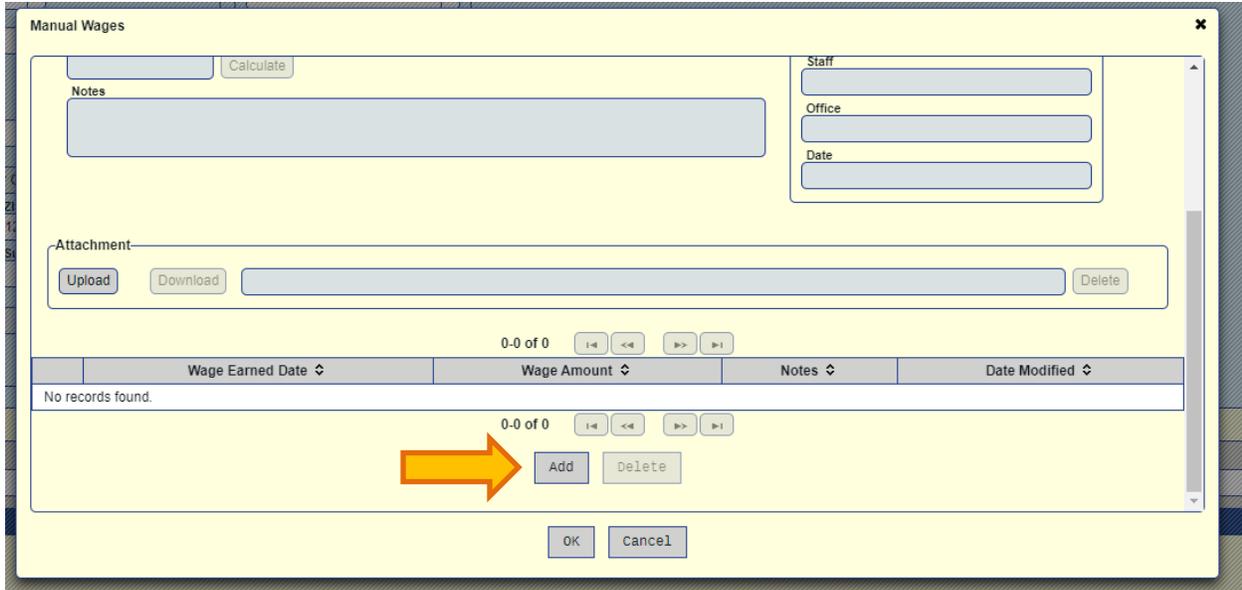When the participant wages are known, they must be entered into OSOS.
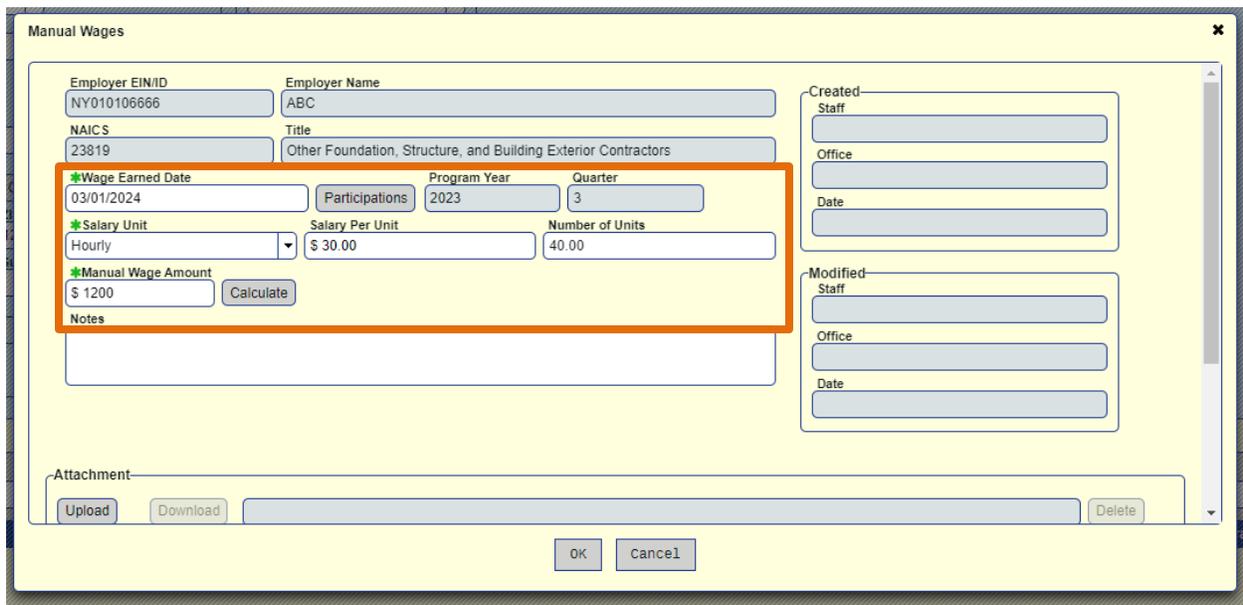Click the **Manual Wages** button in the Employment Outcomes tab.

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

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.

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 |◄ ◄◄ **1** ►► ►| 100 ▼

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| | Summary |U| | JobZone ⬈ | Reload 🔄 | Custom ▾
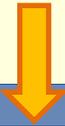
RESOURCES AND ASSISTANCE

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

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