

# Renewable Energy Training Initiative OSOS Guide



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## PURPOSE

In 2024, Governor Kathy Hochul announced funding to support clean energy industry workforce development initiatives in New York State (NYS). The funding, which was approved by the New York Power Authority (NYPA) Board of Trustees, stems from a NYPA commitment in the 2023-2024 Enacted State Budget and will largely support the efforts of the State Office of Just Energy Transition (OJET). OJET was established within the New York State Department of Labor (NYSDOL) in 2023 to connect workers to opportunities for jobs in the clean energy economy through up-skilling and training with a focus on serving those who are traditionally underrepresented, especially within disadvantaged communities.

NYSDOL will issue \$4M in NYPA State funding to interested LWDBs for the OJET Renewable Energy Training Initiative (RETI) through a Notice of Award (NOA) process. This funding can be used for:

- The up-skilling or re-skilling of workers transitioning from fossil fuel to clean energy positions;
- The up-skilling or re-skilling of residential workers in weatherization, building performance, and retrofitting, including fees for required industry-recognized credentials; and
  - Acceptable industry-recognized credentials for residential building science education can be found at: <https://bsesc.energy.gov/recognition>.
- Wraparound services during training, including but not limited to, childcare, transportation, housing, food, mental health services, and substance use services.

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.

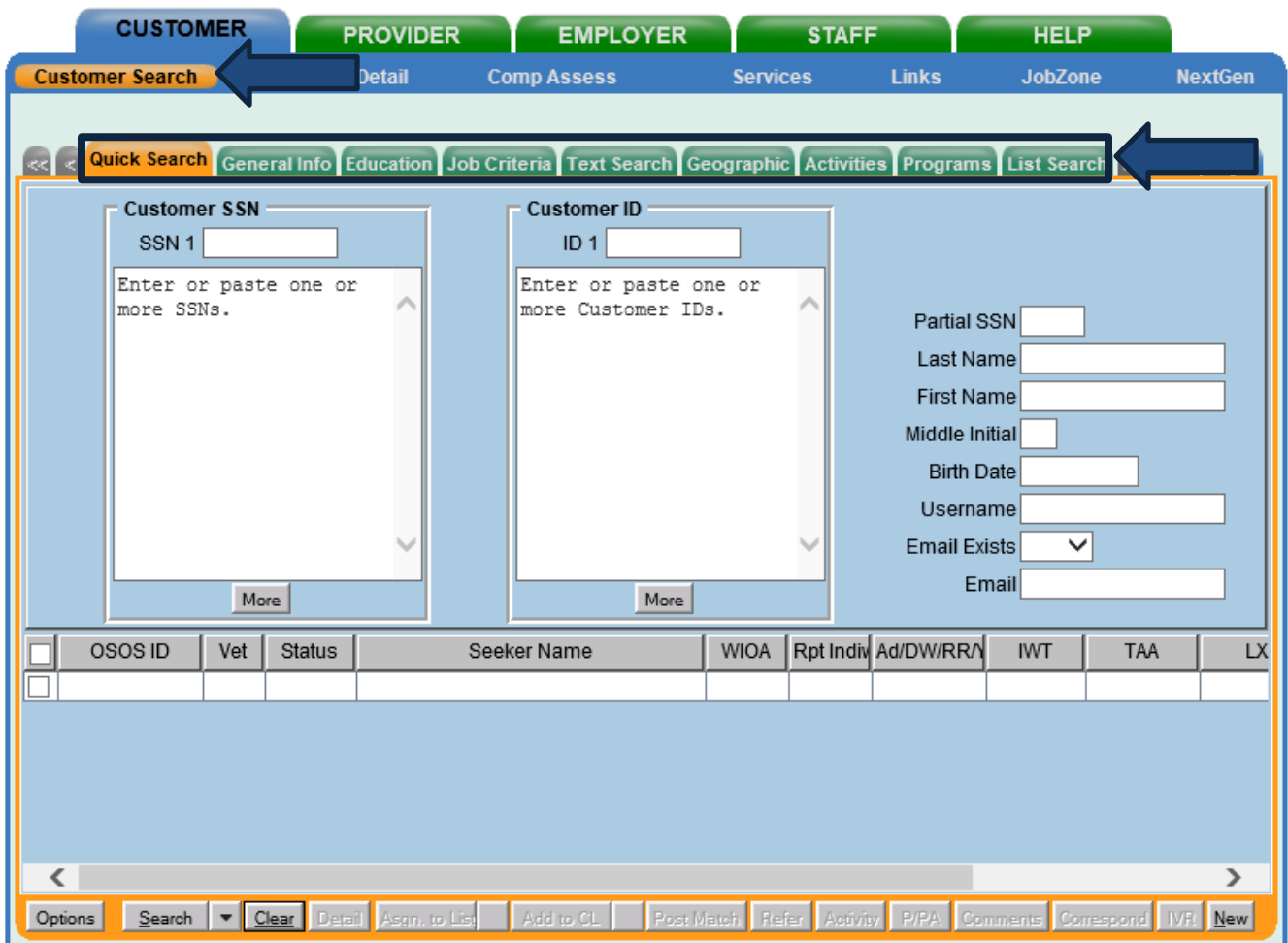
This guide provides instructions on how to conduct the OSOS data entry for the OJET RETI.

## 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 **Quick Search** tab, any of the active tabs 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

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

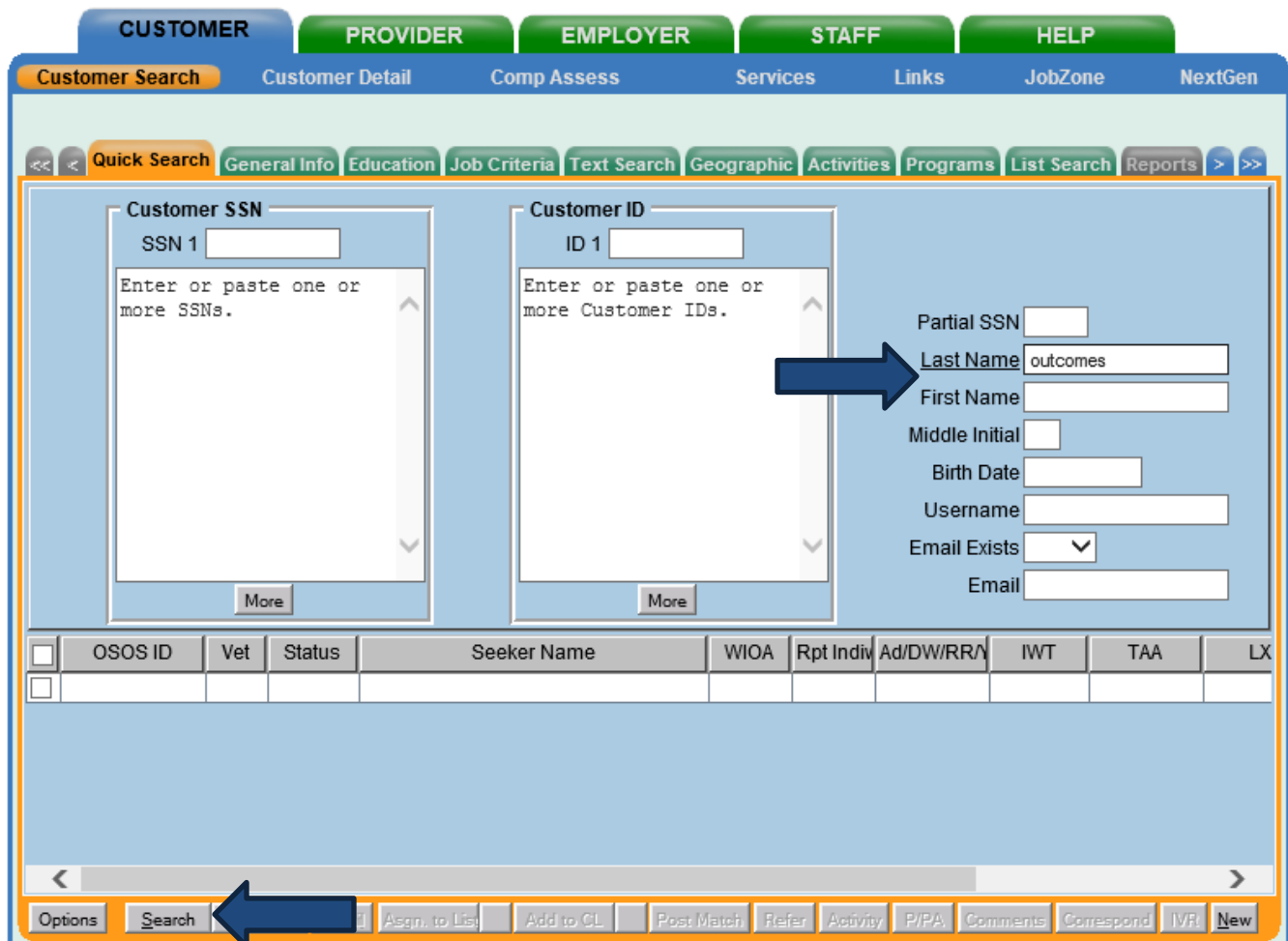
## SEARCHING BY CUSTOMER FULL OR PARTIAL NAME

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](mailto:help.osos@labor.ny.gov).*

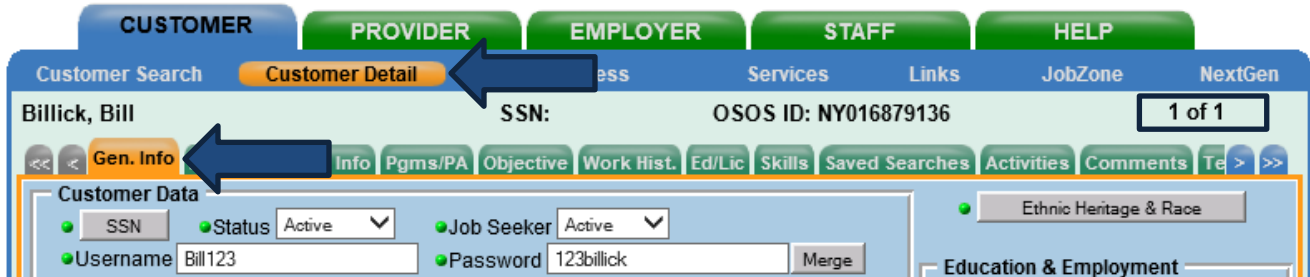
Click the **Search** button.



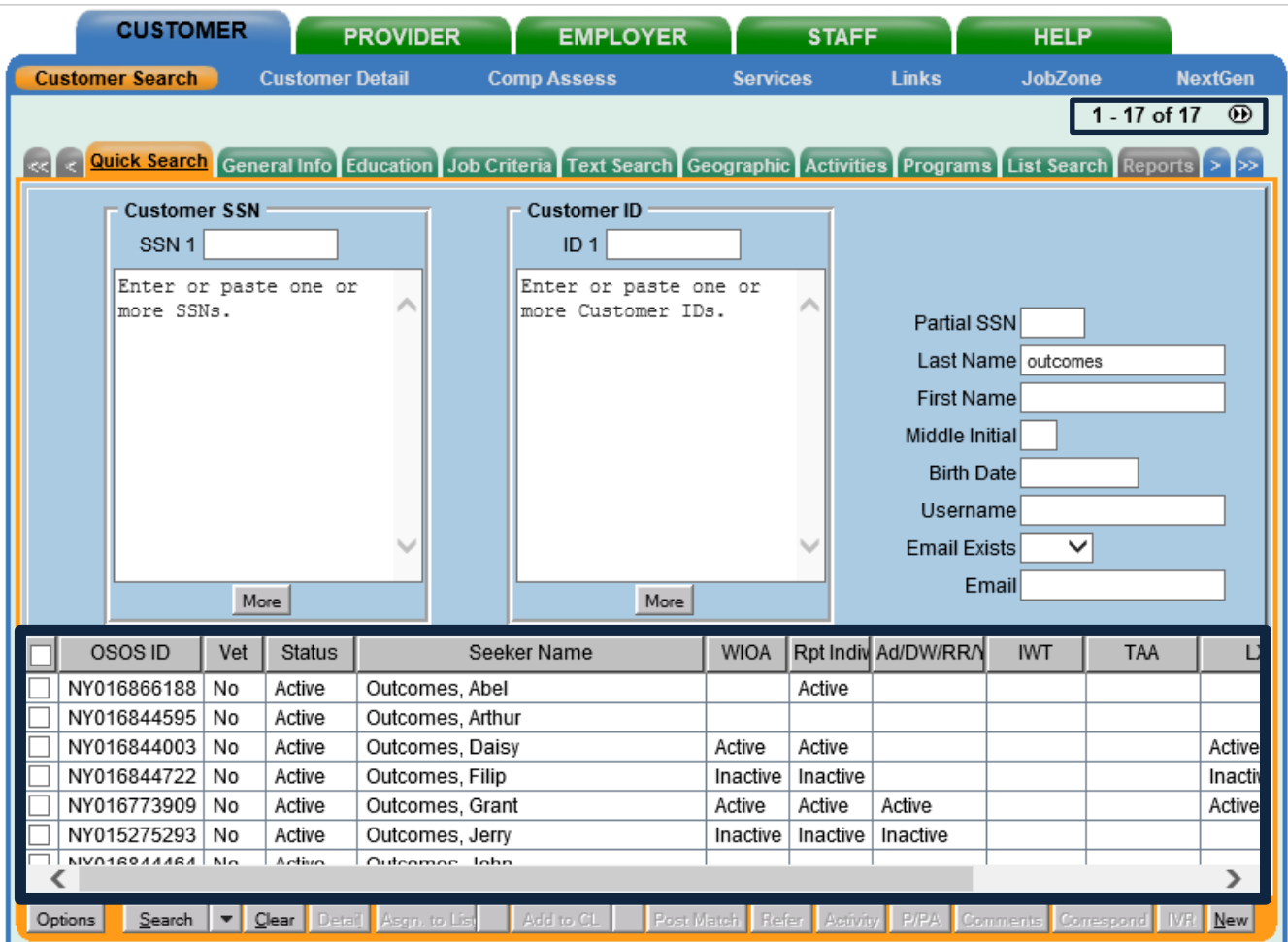
The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, JobZone, and NextGen. The 'Quick Search' tab is selected, showing various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



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 window below the data entry fields.





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.

The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, JobZone, and NextGen. The search results are displayed in a table with columns: OSOS ID, Vet, Status, Seeker Name, WIOA, Rpt Indiv, Ad/DW/RR/A, IWT, TAA, and LX. A toolbar at the bottom contains buttons for Options, Search, Clear, Detail, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New. A blue arrow points to the 'Detail' button.

OSOS ID	Vet	Status	Seeker Name	WIOA	Rpt Indiv	Ad/DW/RR/A	IWT	TAA	LX
<input checked="" type="checkbox"/> NY016866188	No	Active	Outcomes, Abel	-	Active	-	-	-	-
<input checked="" type="checkbox"/> NY016844595	No	Active	Outcomes, Arthur	-	-	-	-	-	-
<input checked="" type="checkbox"/> NY016844003	No	Active	Outcomes, Daisy	Active	Active	-	-	-	Active
<input checked="" type="checkbox"/> NY016844722	No	Active	Outcomes, Filip	Inactive	Inactive	-	-	-	Inactive
<input checked="" type="checkbox"/> NY016773909	No	Active	Outcomes, Grant	Active	Active	Active	-	-	Active
<input checked="" type="checkbox"/> NY015275293	No	Active	Outcomes, Jerry	Inactive	Inactive	Inactive	-	-	-
<input checked="" type="checkbox"/> NY016844464	No	Active	Outcomes, John	-	-	-	-	-	-



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

Customer Search
Customer Detail
Comp Assess
Services
Links
JobZone
NextGen

Outcomes, Abel SSN: OSOS ID: NY016866188 1 of 17

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

**Customer Data**

SSN   
  Status Active   
  Job Seeker Active

Username ssfsgsfdgs   
  Password sgsdfgsfdg Merge

Last Name Outcomes   
  First Name Abel MI

Date of Birth 01/05/2005   
  Gender Male   
  Portfolio Lvl. JobZone Adult

Address 23 Cat Lane

City Box   
  State New York   
  Zip 12345

County Schenectady   
  Country United States   
  Metro

Phone 518-451-6548   
 Ext.    Alt.    Ext.    Fax

Email   
  URL

U.S. Citizen

Enrollments JZ/CZ Manager   
 Add to Case Load

**Customer Assignment**

Staff Assigned NELSON, JORDAN Change

WIB Assigned Albany/Rensselaer/Schenectady Counties

Agency Department of Labor Change Office

Office ALBANY

UI Claimant

Registered 07/23/2024

Origin Staff

Profiled

Profiled Date

Internet Resume   
  Confidential

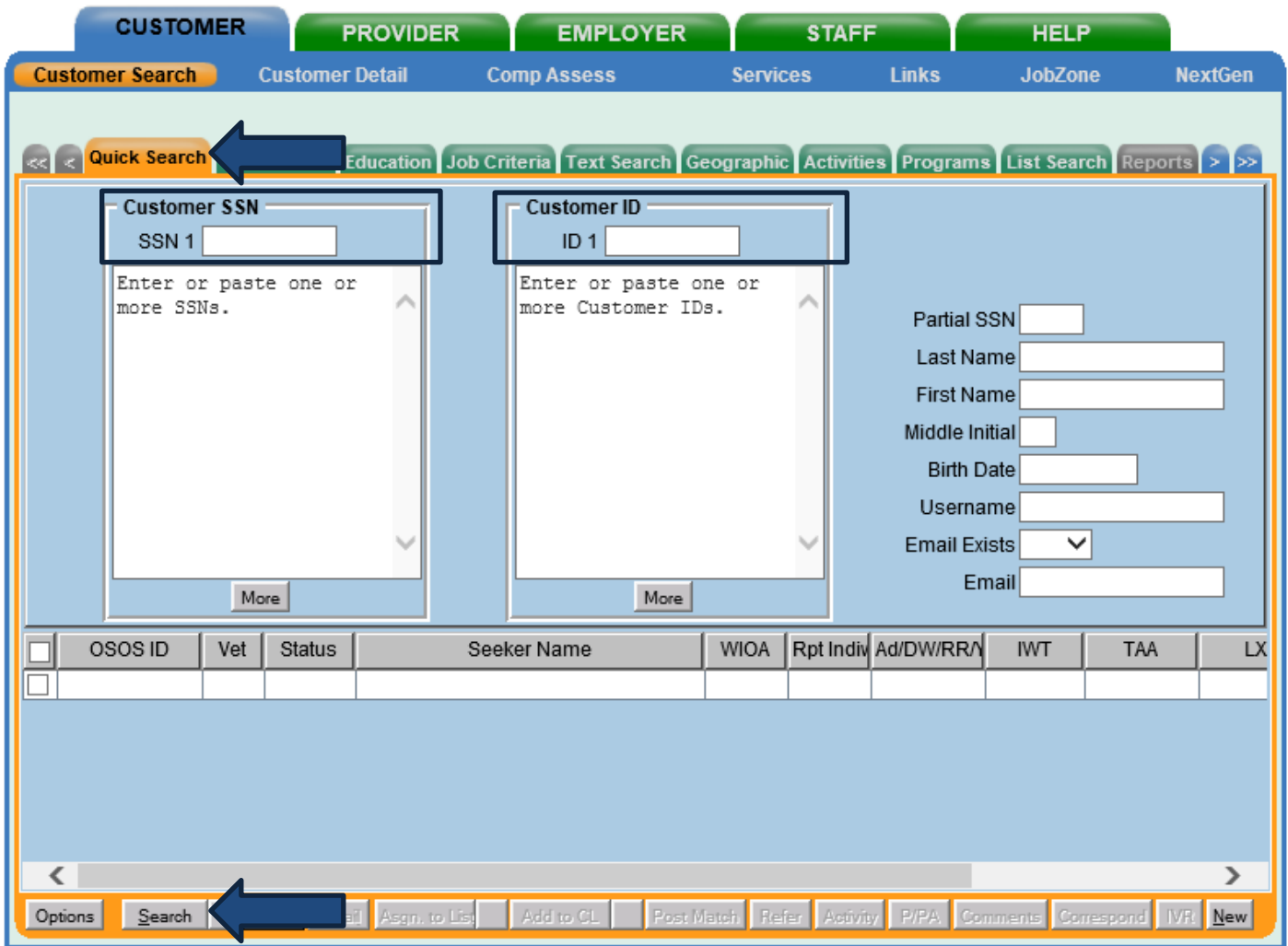
Save Start Match Seryioes Comp Assess Activity I.A. Referrals Correspond IVR Ret to Srch Comments Tag Resume Sched Message



### 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** tab to find the customer record.

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

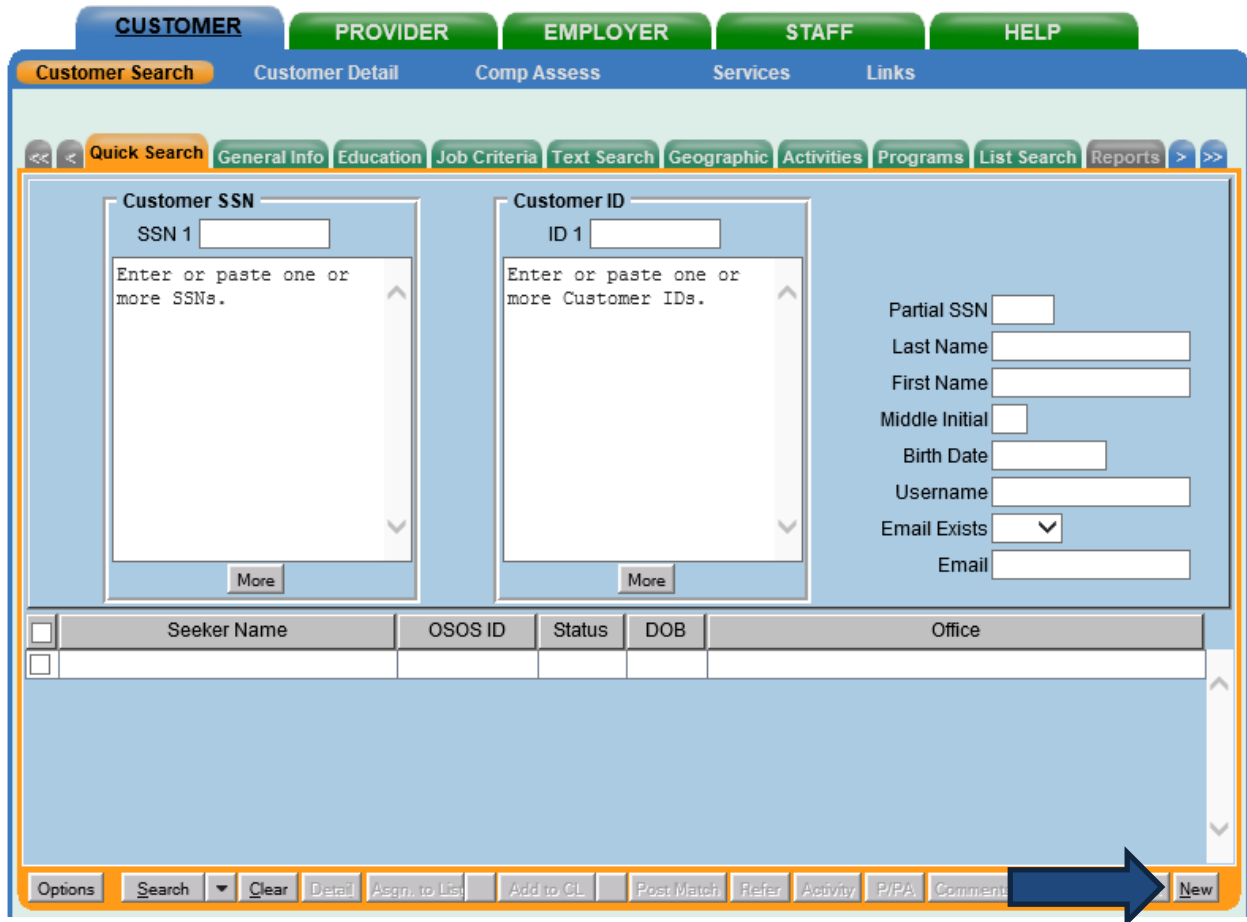


If there is a matching record, OSOS will display the customer's record. If there is no matching record, the system will display **No Matches Found** in the upper right-hand corner.



*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.



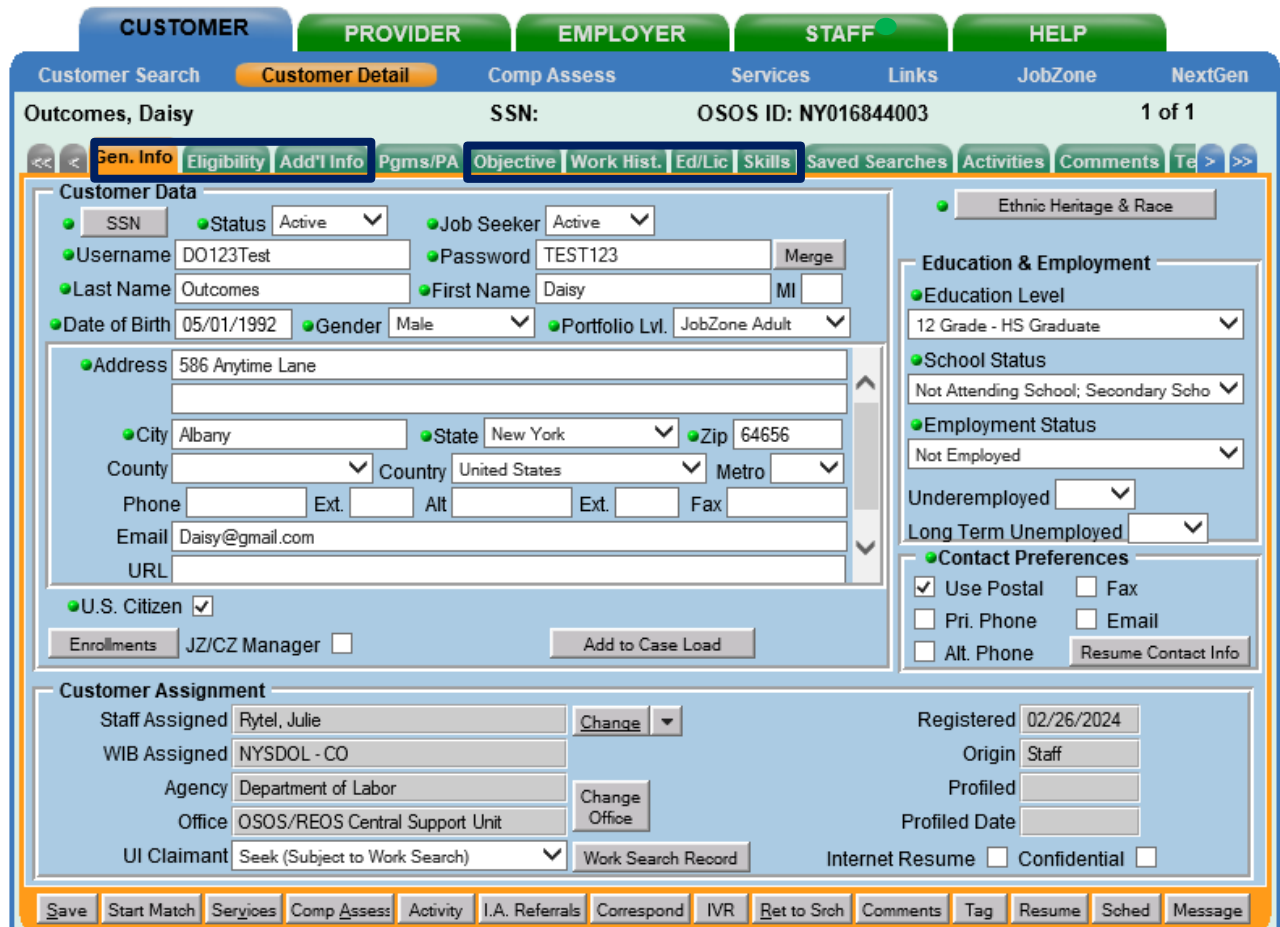
For detailed information on searching for a customer record, please see the [Performing a Customer Search OSOS Guide](#).

For detailed information on creating a customer record, please see the [Creating a Basic Customer Record OSOS Guide](#).

## BASIC CUSTOMER RECORD

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

- **Gen. Info** tab (General Information)
- **Eligibility** tab
- **Add'l Info** tab (Additional Information)
- **Objective** tab
- **Work Hist.** tab (Work History)
- **Ed/Lic** tab (Education/Licenses)
- **Skills** tab



The screenshot shows the OSOS Customer Detail window for a customer named Daisy. The 'Gen. Info' tab is active, and several fields are marked with a green dot to indicate they are required. The fields include SSN, Status, Job Seeker, Username, Password, Last Name, First Name, Date of Birth, Gender, Portfolio Lvl., Address, City, State, Zip, County, Country, Metro, Phone, Ext., Alt, Fax, Email, and URL. The 'U.S. Citizen' checkbox is checked. The 'Education & Employment' section shows the education level as '12 Grade - HS Graduate' and the employment status as 'Not Employed'. The 'Customer Assignment' section shows the staff assigned as 'Rytel, Julie' and the agency as 'Department of Labor'.



*All required fields in OSOS are indicated by a green dot ● 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.

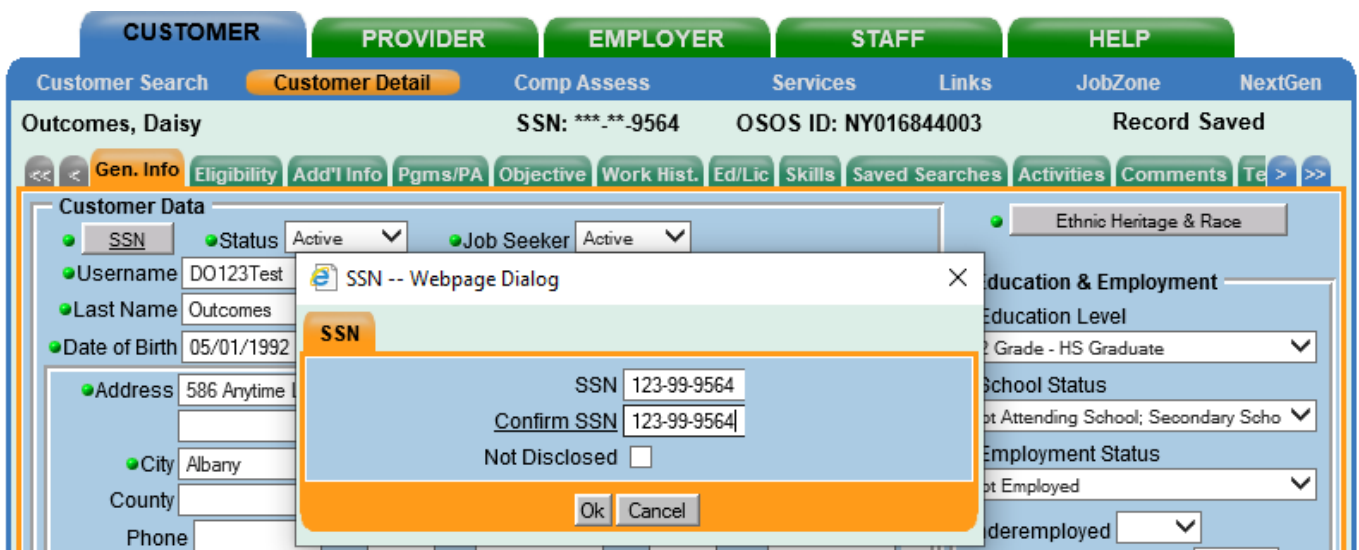
### BASIC CUSTOMER RECORD DETAILS

For detailed instructions on creating a basic customer record, please see the [Creating a Basic Customer Record OSOS Guide](#).

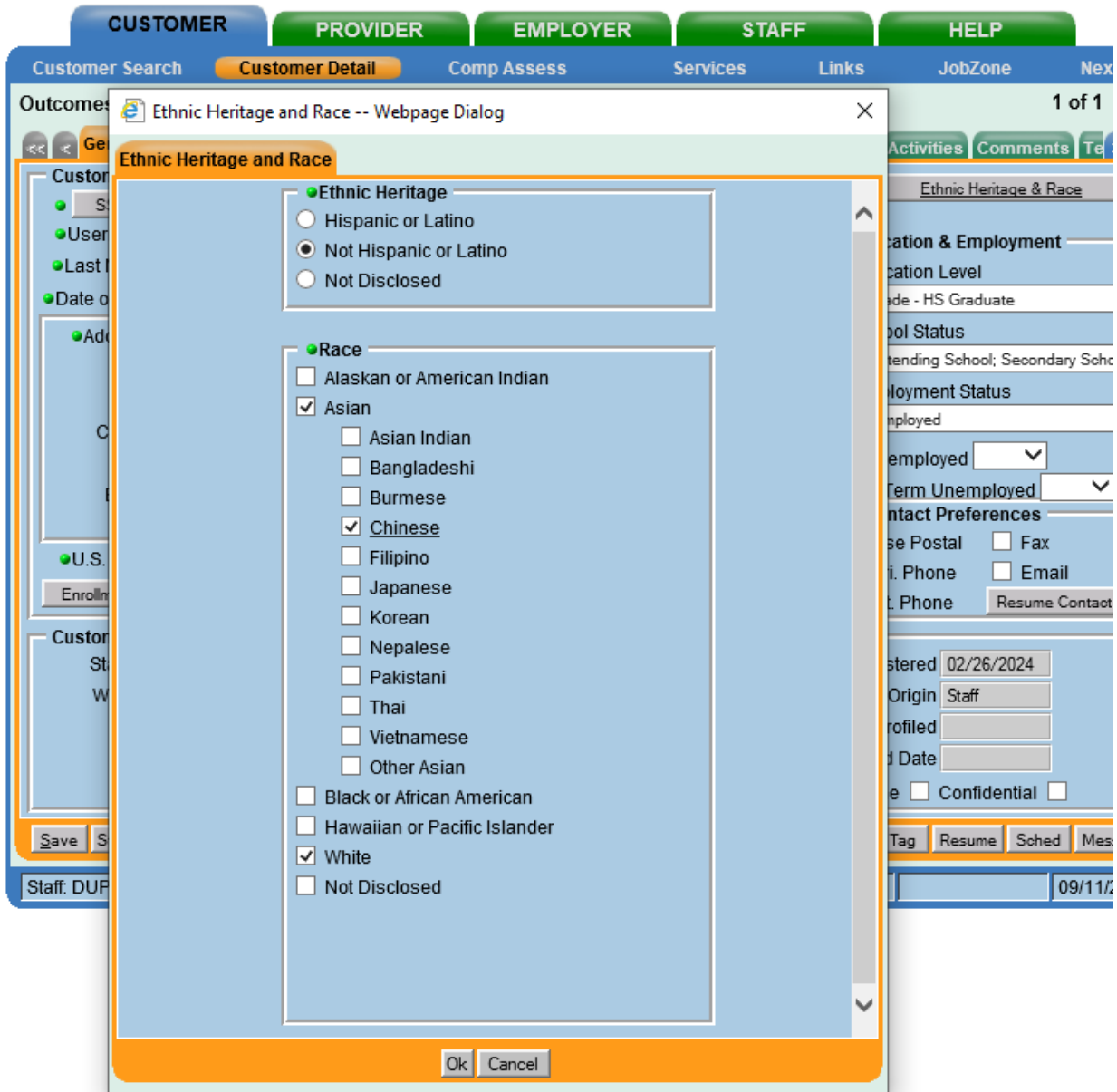
Below are some noteworthy points for filling out the tabs located within the **Customer Detail** window.

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



**Ethnic Heritage and Race -- Webpage Dialog**

**Ethnic Heritage and Race**

**Ethnic Heritage**


- Hispanic or Latino
- Not Hispanic or Latino
- Not Disclosed

**Race**

- Alaskan or American Indian
- Asian
  - Asian Indian
  - Bangladeshi
  - Burmese
  - Chinese
  - Filipino
  - Japanese
  - Korean
  - Nepalese
  - Pakistani
  - Thai
  - Vietnamese
  - Other Asian
- Black or African American
- Hawaiian or Pacific Islander
- White
- Not Disclosed

Ok Cancel

- **Portfolio Level** - A new record will default to **JobZone Adult**. You may keep this designation and therefore create the JobZone account along with the new OSOS record. Or, if the youth is younger than 18, you can choose the highest level of education completed (ex: **Tenth Grade**) in order to create a Career Zone account along with the new OSOS record.
- **Username and Password** - While this is a required field, any record with **Portfolio Lvl** set to **JobZone** will not use these fields for JobZone access. All **Portfolio Lvl**s 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.




*Note: If you are creating a new customer record, the Portfolio Level selected should reflect the highest grade level that the youth has completed. If an OSOS record already exists for the youth, **do not change the Portfolio Level in OSOS.***

#### Additional Info Tab

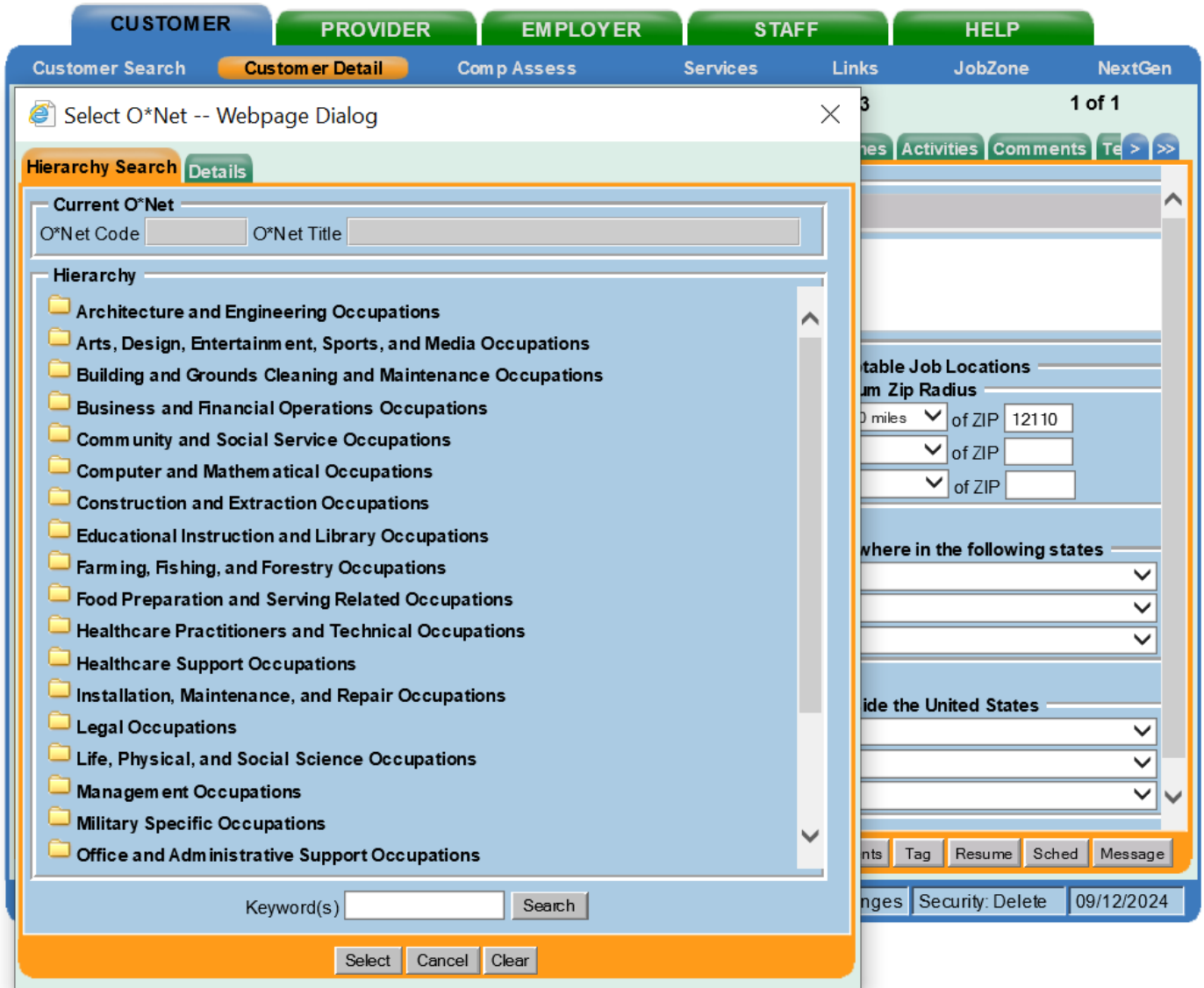
- **Veteran Status** is the only required field on this tab. Additional information entered on this tab can be used to match customers to relevant job postings.

#### Programs / PA Tab

- This tab does not contain any required information. If the participant is receiving public assistance use the check box next to the title, and then fill in the **Reg Date**. If the customer is unsure of when they began receiving public assistance, ask them for their best approximation.

### Objective 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**.



The screenshot shows the 'Select O\*Net -- Webpage Dialog' window. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail (selected), Comp Assess, Services, Links, JobZone, and NextGen. The main window has a title bar 'Select O\*Net -- Webpage Dialog' and a close button. Inside, there are two tabs: 'Hierarchy Search' (selected) and 'Details'. Under 'Hierarchy Search', there is a 'Current O\*Net' section with input fields for 'O\*Net Code' and 'O\*Net Title'. Below that is a 'Hierarchy' section with a list of occupation categories, each with a folder icon and a scrollable list of sub-items. At the bottom of the dialog, there is a 'Keyword(s)' search field, a 'Search' button, and 'Select', 'Cancel', and 'Clear' buttons. The background shows a partially visible 'Customer Detail' page with various fields and buttons.

### Work History Tab

- Select New Job Entry to enter a work history for the customer. Enter all required fields and any additional information provided by the customer. If the customer does not have any Work History, select **No Information Provided**.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links JobZone NextGen

Outcomes, Daisy SSN: \*\*\*-\*\*-9564 OSOS ID: NY016844003 1 of 1

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

**Detail**

Job Title: Designers, All Other O\*Net Titles: 27102900

Employer: ABC Design Include online:  Start Date: 01/02/2023 End Date: 04/01/2023

Address: 1st Street Supervisor:  Phone:  Ext:

City: Albany Wage: \$ 25.00 Hourly:  Hours/week: 40

State: New York Reason for Leaving: Category 1-DW

Country: United States Job Duties: Creating design and fashion Job Duties

Job Type: Full Time RR Event#:  Event

NAICS:  NAICS Lookup

**Dislocated Worker Information**

Qualifying Dislocation Date: 04/01/2023 Tenure (months): 3

O\*Net at Dislocation: 27102900 Designers, All Other

NAICS:

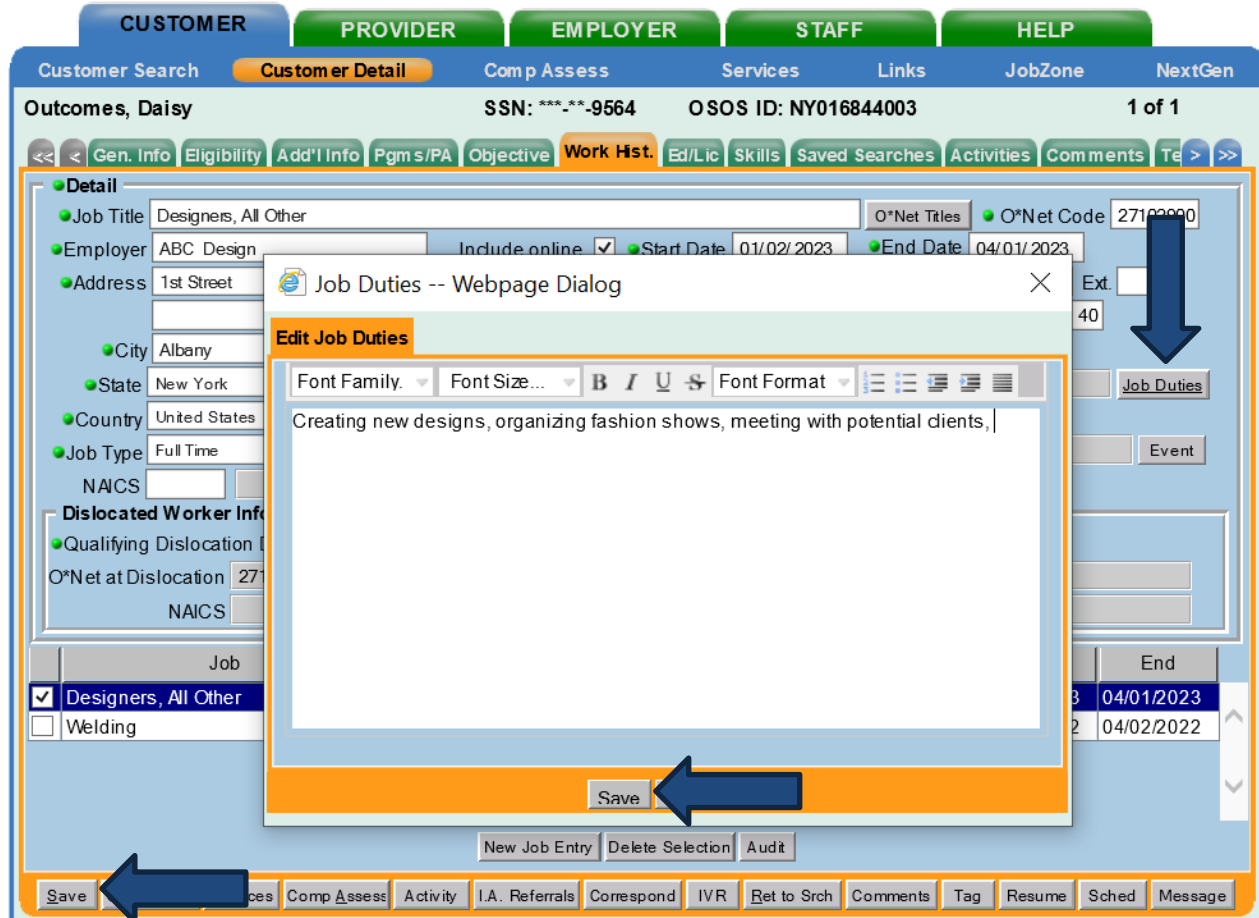
Job	Company	City	Start	End
<input checked="" type="checkbox"/> Designers, All Other	ABC Design	Albany	01/02/2023	04/01/2023
<input type="checkbox"/> Welding	ABC Welding	Anytown	02/03/2022	04/02/2022

New Job Entry Delete Selection Audit

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



Click the **Job Duties** button to open up a new webpage dialog box. Enter the job duties in the freeform text box and click **Save**.



### Ed/Lic Tab

- There are three required sections within this tab; **Certificates/Licenses**, **Schools**, and **Professional Associations**. If the customer does not have information to enter in these sections, select **No Information Provided** under each section.

### Skills Tab

- **Additional Skills Text:** Enter any additional skills and abilities that are important to the customer's job performance.

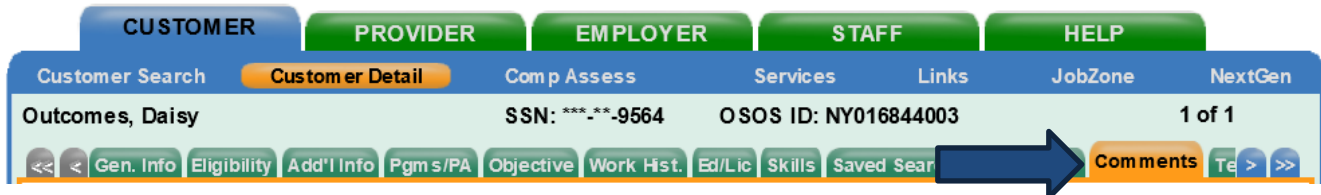


*Once the **Skills** tab is completed, and the entire basic customer record has been entered, click the **Save** button at the bottom of the screen. **Record Saved** will briefly be displayed in the upper right-hand corner when the record is successfully saved. If there are fields missing information, 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 window is important for recording the customer's barriers and challenges. For detailed instructions on completing the Comprehensive Assessment, please see the [Comprehensive Assessment & Supplemental Data Guide](#).

Many of the fields in **Comp Assess** are used to determine eligibility under WIOA programs. Since the RETI is a State-funded program, participants do not need to be co-enrolled in the WIOA programs. Participants served solely under the local RETI will not be included in WIOA performance. For the purposes of this initiative, 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 WIOA. If a customer is being enrolled in both the RETI and WIOA programs, 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 measures.

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



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

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

Customer Search   Customer Detail   **Comp Assess**   Links   JobZone   NextGen

Outcomes, Daisy   SSN: \*\*\*-\*\*-9564   OSOS ID: NY016844003

<<   **Employment**   Education   Financial   Family   Health   Treatments   Legal   Housing   Transportation   Comments   Attachments   >>

<p>Origination Date <input type="text" value="02/27/2024"/>   Last Update <input type="text" value="08/05/2024"/></p> <p>Staff Assigned <input type="text"/></p> <p><b>Employment Objective</b></p> <p>Job Title <input type="text" value="Light Truck or Delivery Services Drivers"/></p> <p>Wage Desired <input type="text" value="\$ 25.00"/>   Per <input type="text" value="Hourly"/></p> <p>Geographical Location</p> <p><input type="text" value="Within 50 miles of 12110"/></p> <p><input type="text"/></p> <p><input type="text"/></p> <p>Is the customer interested in non-traditional employment?   <input type="radio"/> Yes   <input type="radio"/> No</p> <p>Current Employment Status <input type="text" value="Not Employed"/></p> <p>Poor Work History?   <input type="checkbox"/></p> <p>Youth Needing Additional Assistance?   <input type="text" value="No"/> ▼</p> <p>Serious Barriers to Employment?   <input type="text" value="No"/> ▼</p> <p>• Cultural Barriers to Employment?   <input type="text" value="No"/> ▼</p>	<p><b>Job Behavior and Skills</b></p> <p>Employment Behavior</p> <div style="border: 1px solid #ccc; height: 40px; margin-bottom: 5px;"></div> <p>Job Seeking Skills</p> <div style="border: 1px solid #ccc; height: 40px; margin-bottom: 5px;"></div> <p>Job Keeping Skills</p> <div style="border: 1px solid #ccc; height: 40px; margin-bottom: 5px;"></div> <p>Summary of Occupational Strengths &amp; Weaknesses</p> <div style="border: 1px solid #ccc; height: 40px; margin-bottom: 5px;"></div> <p style="text-align: center;"><input type="button" value="View Employment History"/></p>
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Below are some noteworthy points for filling out the tabs located within the **Comprehensive Assessment** window for participants only enrolled in the RETI. However, as a best practice, staff should always enter as much information as known about the customer to better serve and meet their needs.

### Employment Tab

- **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 Tab

- **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 Tab** - Do not enter any information into this tab.

### Family Tab

- **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. Or, select **Not Disclosed**.
- **Is Customer parenting youth?** - Female customers are considered parenting once pregnant. Alternatively, male customers are only considered parenting once their child is born.



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

**Health Tab** and **Treatment Tab** - These are both greyed out and not accessible. They require no action.



**Legal Tab** - 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 Tab

- **Current Housing** - Select the option that most closely reflects the customer's current housing status. Or, select **Not Disclosed**.

**Comments Tab** - Do not use the **Comments** tab located within the **Comp Assess** window. Any **Comments** must be recorded in the **Customer Detail** window, **Comments** tab.

## SERVICES

Staff use the **Services** window in OSOS to record the services provided to the customer.

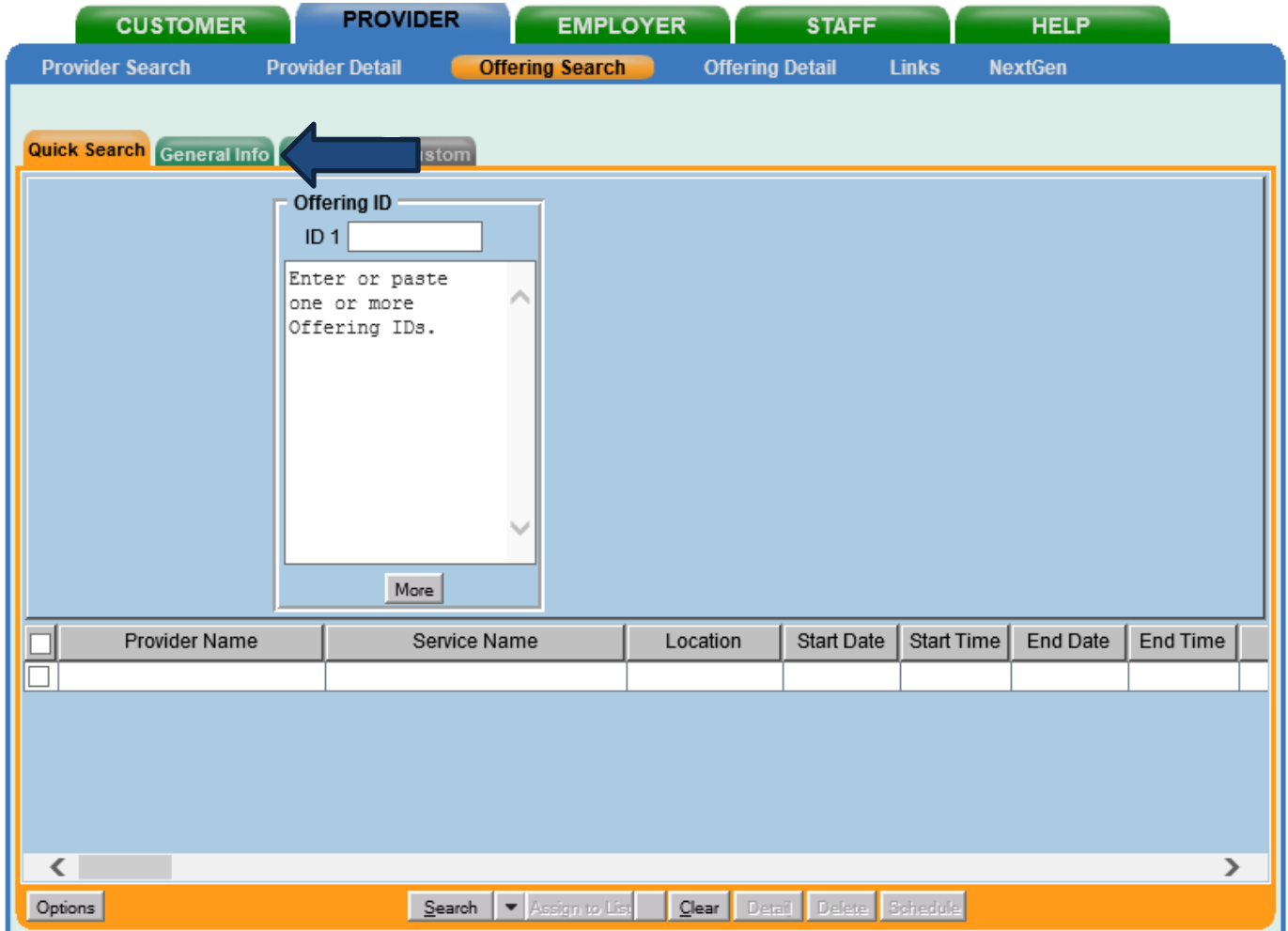
### ENTERING THE SERVICE

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

Then select the **New Service** button.

The screenshot displays the OSOS interface for the 'Services' window. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services (highlighted), Links, JobZone, and NextGen. The main content area shows a form for entering service details. A blue arrow points to the 'Services' tab. The form includes fields for Service Name, Service Desc., Service ID, Service Type, Provider Name, Location Name, Provider ID, Offering ID, Plan. Start Date, Plan. End Date, Actual Start Date, Actual End Date, Completed Successfully, Next Contact Date, Program Service Type, Part Time Learn., and Distance Learn. There is also a 'Funding' section with a table for Level, Source, Obligated, Actual, and Oblig #. Below the table are fields for Total Funding, Petition #, Waiver Reason, RR Event #, and Incumbent Worker Training. At the bottom, there is a 'New Service' button highlighted with a blue arrow, along with other buttons like Options, Print List, Save, Customer Detail, Comp Assess, and Comments.

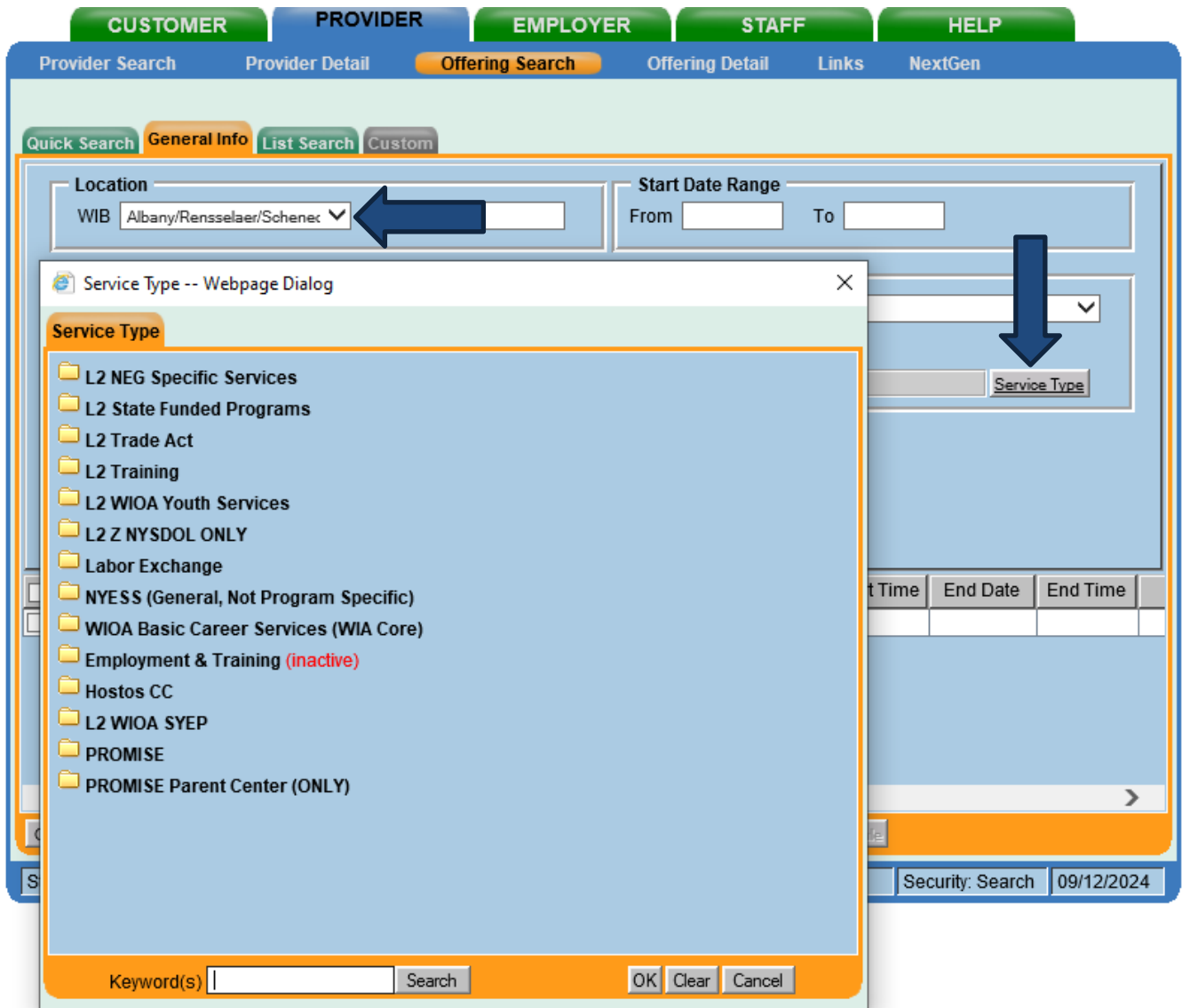
This navigates to the **Provider** module, **Offering Search** window, **Quick Search** tab. Select the **General Info** tab.



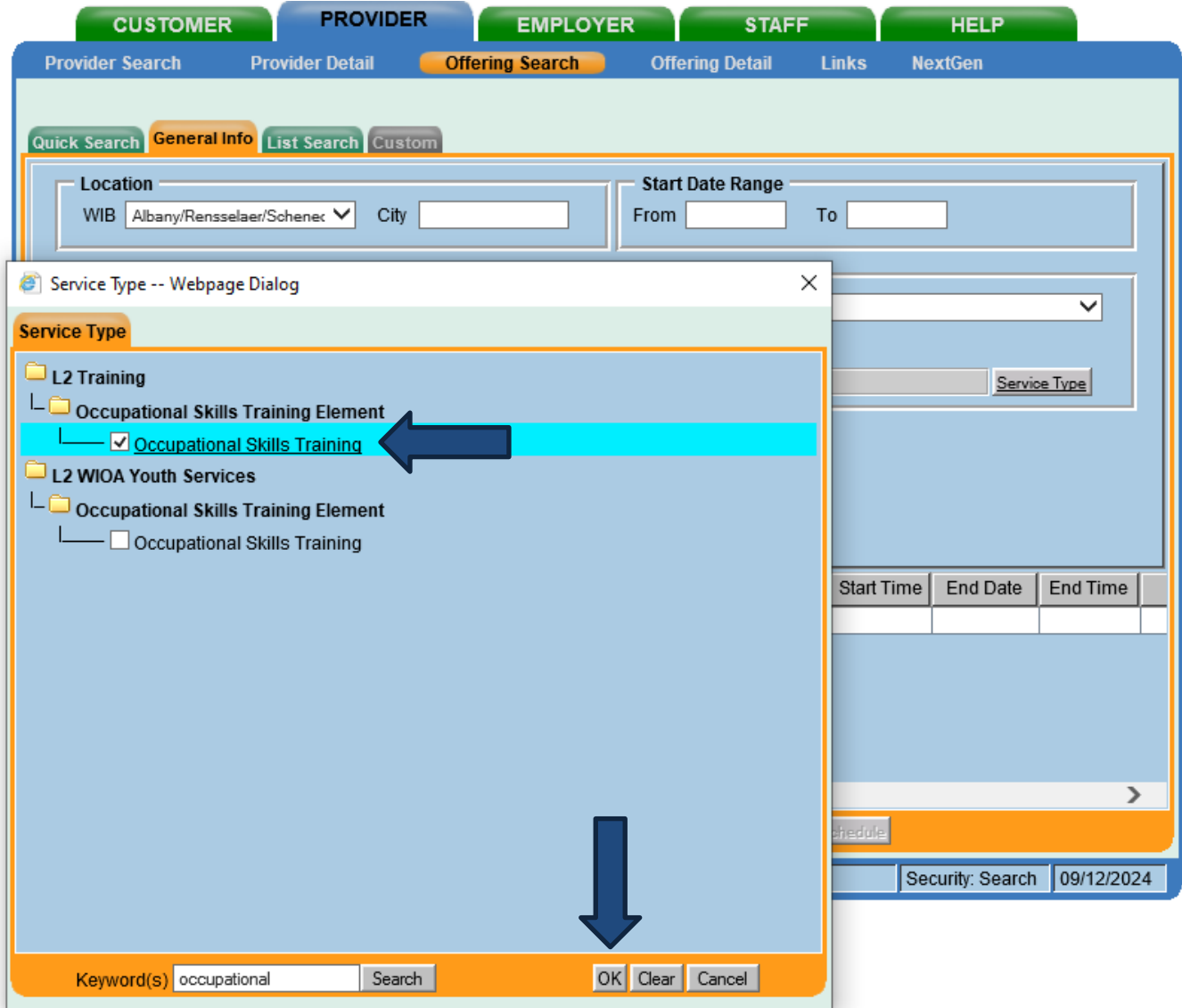
The screenshot shows the OSOS web interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (highlighted), Offering Detail, Links, and NextGen. The main content area has two sub-tabs: Quick Search and General Info (selected, with a blue arrow pointing to it). The General Info tab contains a form with an 'Offering ID' label, a text input field containing 'ID 1', and a larger text area with the instruction 'Enter or paste one or more Offering IDs.' and a 'More' button. Below the form is a table with columns: Provider Name, Service Name, Location, Start Date, Start Time, End Date, and End Time. The table has two empty rows. At the bottom, there is a toolbar with buttons: Options, Search, Assign to List, Clear, Detail, Delete, and Schedule.

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 **OK**.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (highlighted), Offering Detail, Links, and NextGen. Underneath are further sub-tabs: Quick Search, General Info (highlighted), List Search, and Custom. The main area contains search filters for Location (WIB Albany/Rensselaer/Schenec, City) and Start Date Range (From, To). A dialog box titled "Service Type -- Webpage Dialog" is open in the foreground. It shows a tree view of service types: L2 Training, Occupational Skills Training Element (with a checked checkbox for Occupational Skills Training), L2 WIOA Youth Services, and another Occupational Skills Training Element (with an unchecked checkbox for Occupational Skills Training). A blue arrow points to the checked "Occupational Skills Training" option. At the bottom of the dialog, there is a search field with "occupational" entered, and buttons for Search, OK, Clear, and Cancel. The background interface also shows a table with columns for Start Time, End Date, and End Time, and a Security Search field with the date 09/12/2024.



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

CUSTOMER **PROVIDER** EMPLOYER STAFF HELP

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

Quick Search **General Info** List Search Custom

**Location**  
 WIB Albany/Rensselaer/Schenect City

**Start Date Range**  
 From  To

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

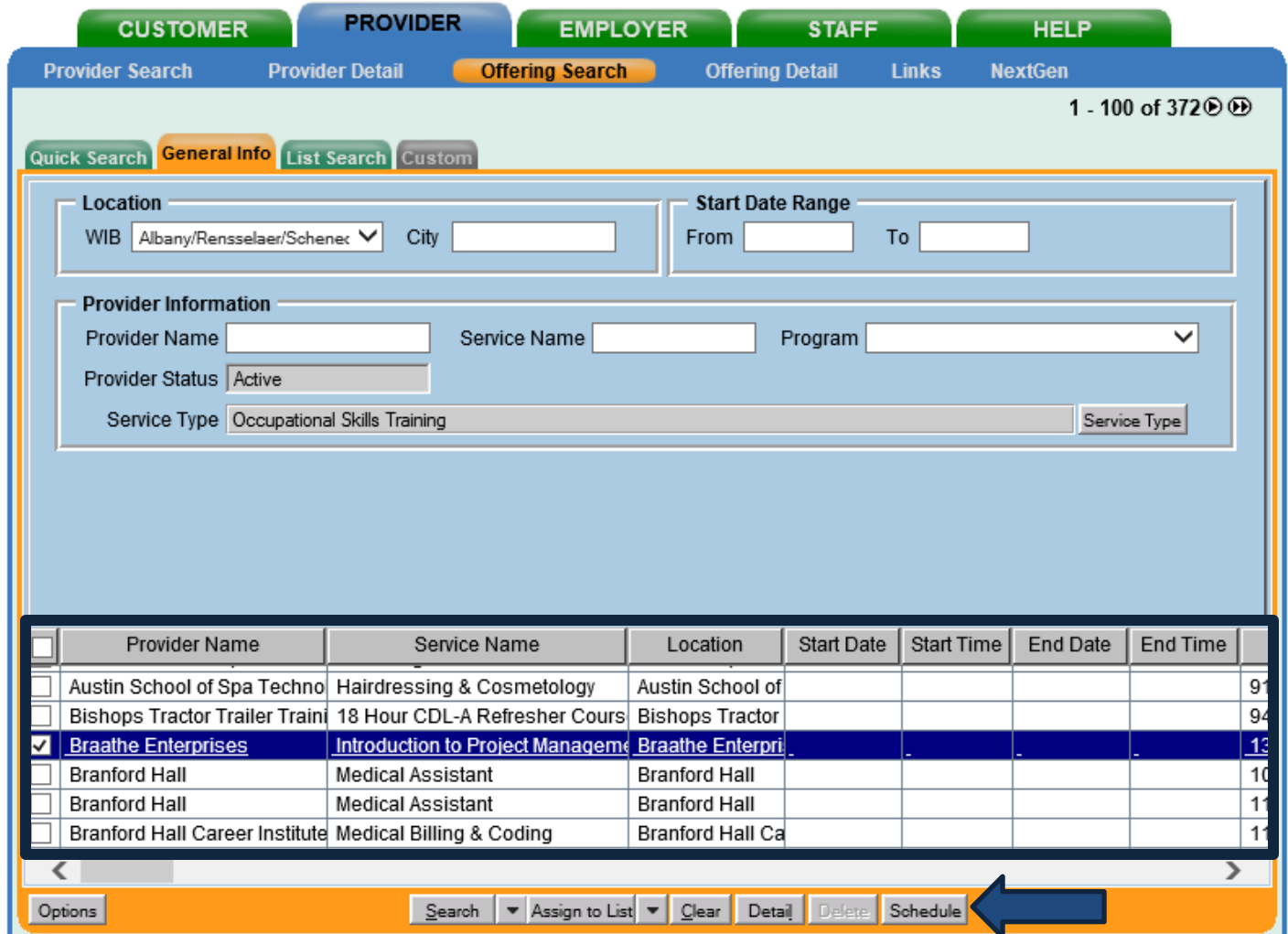
<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>							

↓

Options Search Assign to List Clear Detail Delete Schedule

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

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



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

1 - 100 of 372

Quick Search    **General Info**    List Search    Custom

**Location**  
 WIB  City

**Start Date Range**  
 From  To

**Provider Information**  
 Provider Name     Service Name     Program

Provider Status

Service Type

<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>	Austin School of Spa Techno	Hairdressing & Cosmetology	Austin School of				91
<input type="checkbox"/>	Bishops Tractor Trailer Traini	18 Hour CDL-A Refresher Cours	Bishops Tractor				94
<input checked="" type="checkbox"/>	<u>Braathe Enterprises</u>	<u>Introduction to Project Managem</u>	<u>Braathe Enterpri</u>				13
<input type="checkbox"/>	Branford Hall	Medical Assistant	Branford Hall				10
<input type="checkbox"/>	Branford Hall	Medical Assistant	Branford Hall				11
<input type="checkbox"/>	Branford Hall Career Institute	Medical Billing & Coding	Branford Hall Ca				11

Options    Search    Assign to List    Clear    Detail    Delete    **Schedule**



This brings you to the **Customer** module, **Services** 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.

The screenshot displays the OSOS interface with the following details:

- Navigation:** CUSTOMER (selected), PROVIDER, EMPLOYER, STAFF, HELP
- Customer Search:** Customer Search, Customer Detail, Comp Assess, **Services**, Links, JobZone, NextGen
- Customer Info:** Outcomes, Daisy; SSN: \*\*\*-\*\*-9564; OSOS ID: NY016844003
- Service List:** << < Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcomes Commer > >>
- Detail Section:**
  - Provider Name: Braathe Enterprises
  - Location Name: Braathe Enterprises
  - Provider ID: 83060; Offering ID: 131925
  - Plan. Start Date: 09/12/2024; Plan. End Date: 09/12/2025
  - Actual Start Date: 09/12/2024; Actual End Date: (empty)
  - Completed Successfully: (dropdown menu)
  - Next Contact Date: 01/13/2025
  - Program Service Type: ITA-Training
  - Part Time Learn.: Yes; Distance Learn.: No
  - Program: (dropdown menu)
  - Minimum Hours: (input field); Number of Weeks: (input field)
  - O\*Net: 47401101; Energy Auditors; O\*Net: (input field)
  - NAICS: (input field); NAICS: (input field)
- Funding Section:**

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

Total Funding: (input field) [Add] [Edit] [Delete]  
 Petition #: (input field)  
 RR Event #: (dropdown menu)  
 Incumbent Worker Training: (dropdown menu)
- Service List Table:**

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/>	Braathe Enterprises	Introduction to Project Management	09/12/2024	.	ITA-Training
- Footer:** Options, Print List, New Service, Delete Service, Authorization, IPA Service Summary, Payments, Tracking, Save, Customer Detail, Comp Assess, Comments



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, work experience, individualized service strategy, supportive services).

Please note, if you are recording a youth service, **Youth Services** cannot be selected as the **Program Service Type** unless funded with WIOA funds. If you are recording a youth service, select the appropriate **Achievement Objective** from the **Achievement Objective dropdown**.

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.

The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services (highlighted), Links, JobZone, and NextGen. The main content area shows 'Outcomes, Daisy' with SSN: \*\*\*-\*\*9564 and OSOS ID: NY016844003. There are navigation arrows and tabs for Achievement Objectives, Services (highlighted), Service History, Enrollments, Outcomes, Empl. Outcomes, Trng. Outcomes, and Commer. The 'Detail' section contains the following fields:

- Provider Name: Braathe Enterprises
- Location Name: Braathe Enterprises
- Provider ID: 83060
- Offering ID: 131925
- Plan. Start Date: 09/12/2024
- Plan. End Date: 09/12/2025
- Actual Start Date: 09/12/2024
- Actual End Date: [empty]
- Completed Successfully: [dropdown]
- Next Contact Date: 01/13/2025
- Program Service Type: ITA-Training
- Part Time Learn.: Yes
- Distance Learn.: No
- Program: [dropdown]
- Minimum Hours: [empty]
- Number of Weeks: [empty]
- O\*Net: 47401101 Energy Auditors
- NAICS: [empty]

The 'Funding' section includes a table with columns: Level, Source, Obligated, Actual, and Oblig #. Below the table are fields for Total Funding, Petition #, RR Event #, and Incumbent Worker Training. At the bottom, there is a table with columns: Provider Name, Service Name, Actual Start Date, Actual End Date, and Program Svc Type. The table contains one row:

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
Braathe Enterprises	Introduction to Project Management	09/12/2024	.	ITA-Training

At the bottom of the form, there are buttons for Options, Print List, New Service, Delete Service, Authorization, IPA Service Summary, Payments, and Tracking. A blue arrow points to the 'Save' button.



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

**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

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

Outcomes, Daisy SSN: \*\*\*-\*\*-9564 OSOS ID: NY016844003

Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcomes Commer >>

**Detail**

Provider Name Braathe Enterprises

Location Name Braathe Enterprises

Provider ID 83060 Offering ID 131925

Plan. Start Date 09/12/2024 Plan. End Date 09/12/2025

Actual Start Date 09/12/2024 Actual End Date

Completed Successfully

Next Contact Date 01/13/2025

Program Service Type ITA-Training

Part Time Learn. Yes Distance Learn. No

Program

Minimum Hours Number of Weeks

O\*Net 47401101 Energy Auditors O\*Net

NAICS

**Funding**

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

↓

Total Funding \$ 1.00

Petition #

RR Event #

Incumbent Worker Training

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/>	Braathe Enterprises	Introduction to Project Management	09/12/2024	.	ITA-Training

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

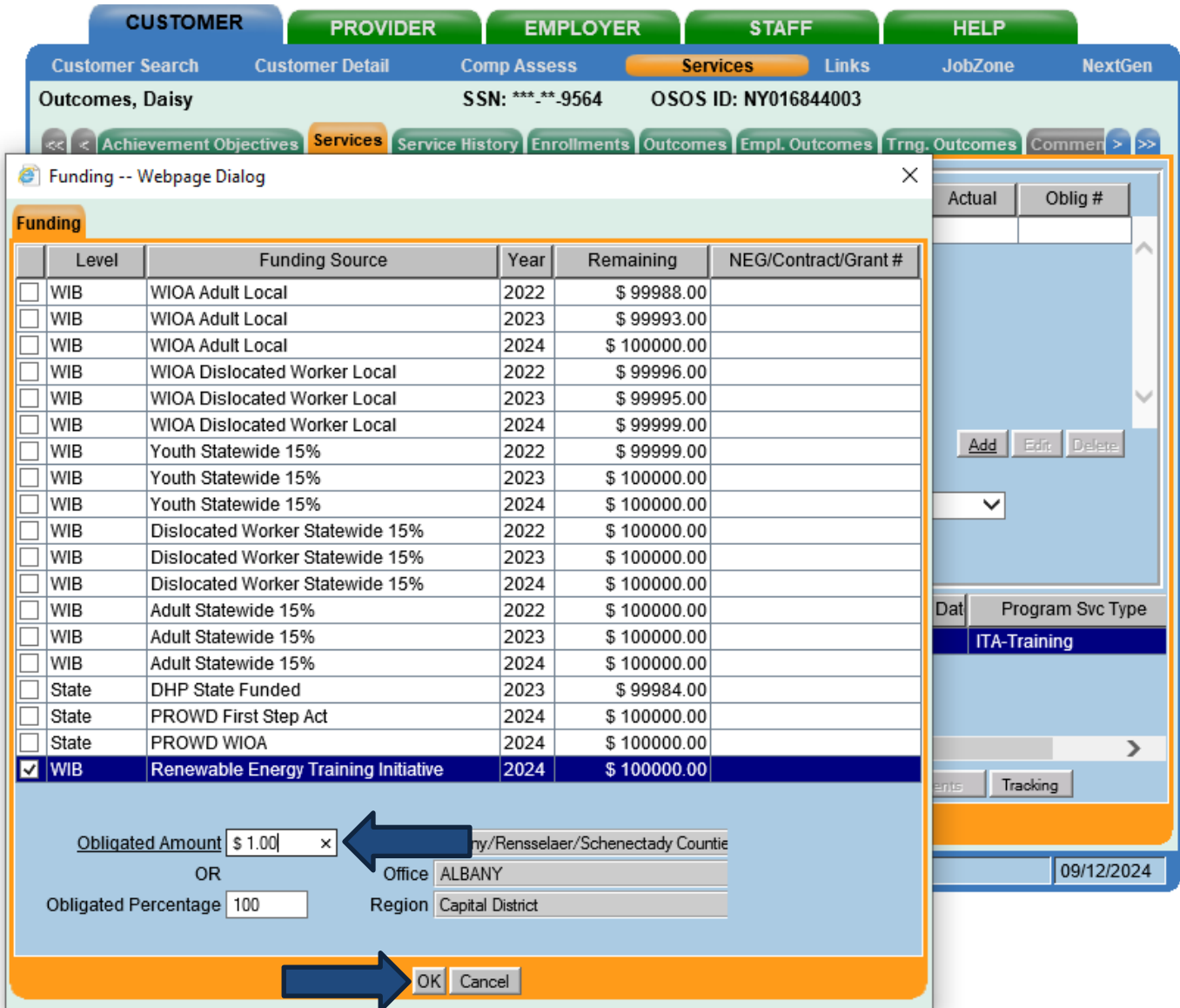
Save Customer Detail Comp Assess Comments

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

Select the **Renewable Energy Training Initiative** funding.

Enter 1 in the **Obligated Amount** field. This will automatically populate the **Obligated Percentage** field as \$1.00 or 100.

Click **OK**.



**CUSTOMER PROVIDER EMPLOYER STAFF HELP**

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

Outcomes, Daisy SSN: \*\*\*.\*\*-9564 OSOS ID: NY016844003

<< < Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcomes Commen > >>

Funding -- Webpage Dialog

	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	WIB	WIOA Adult Local	2022	\$ 99988.00	
<input type="checkbox"/>	WIB	WIOA Adult Local	2023	\$ 99993.00	
<input type="checkbox"/>	WIB	WIOA Adult Local	2024	\$ 100000.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2022	\$ 99996.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2023	\$ 99995.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2024	\$ 99999.00	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2022	\$ 99999.00	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2024	\$ 100000.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2022	\$ 100000.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2024	\$ 100000.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2022	\$ 100000.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2024	\$ 100000.00	
<input type="checkbox"/>	State	DHP State Funded	2023	\$ 99984.00	
<input type="checkbox"/>	State	PROWD First Step Act	2024	\$ 100000.00	
<input type="checkbox"/>	State	PROWD WIOA	2024	\$ 100000.00	
<input checked="" type="checkbox"/>	WIB	Renewable Energy Training Initiative	2024	\$ 100000.00	

Actual Oblig #

Add Edit Delete

Date Program Svc Type

ITA-Training

Tracking

09/12/2024

Obligated Amount \$ 1.00 x

OR

Obligated Percentage 100

Office ALBANY

Region Capital District

OK Cancel



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

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

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

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

Outcomes, Daisy SSN: \*\*\*-\*\*-9564 OSOS ID: NY016844003

<< < Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcomes Commer > >>

**Detail**

Provider Name Braathe Enterprises

Location Name Braathe Enterprises

Provider ID 83060 Offering ID 131925

Plan. Start Date 09/12/2024 Plan. End Date 09/12/2025

Actual Start Date 09/12/2024 Actual End Date

Completed Successfully

Next Contact Date 01/13/2025

Program Service Type ITA-Training

Part Time Learn. Yes Distance Learn. No

Program

Minimum Hours Number of Weeks

O\*Net 47401101 Energy Auditors O\*Net

NAICS

**Funding**

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WIB Renewable Ener	\$ 1.00	\$ 0.00	

Total Funding \$ 1.00

Petition #

RR Event #

Incumbent Worker Training

	Provider Name	Service Name	Actual Start Dat	Actual End Dat	Program Svc Type
<input checked="" type="checkbox"/>	Braathe Enterprises	Introduction to Project Management	09/12/2024		ITA-Training

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking



### ENTERING THE SUPPORTIVE SERVICE

Staff use the **Services** window in OSOS to record the **Supportive Services** provided to the customer. This is essentially entered the same way as a regular service, with some slight variations.

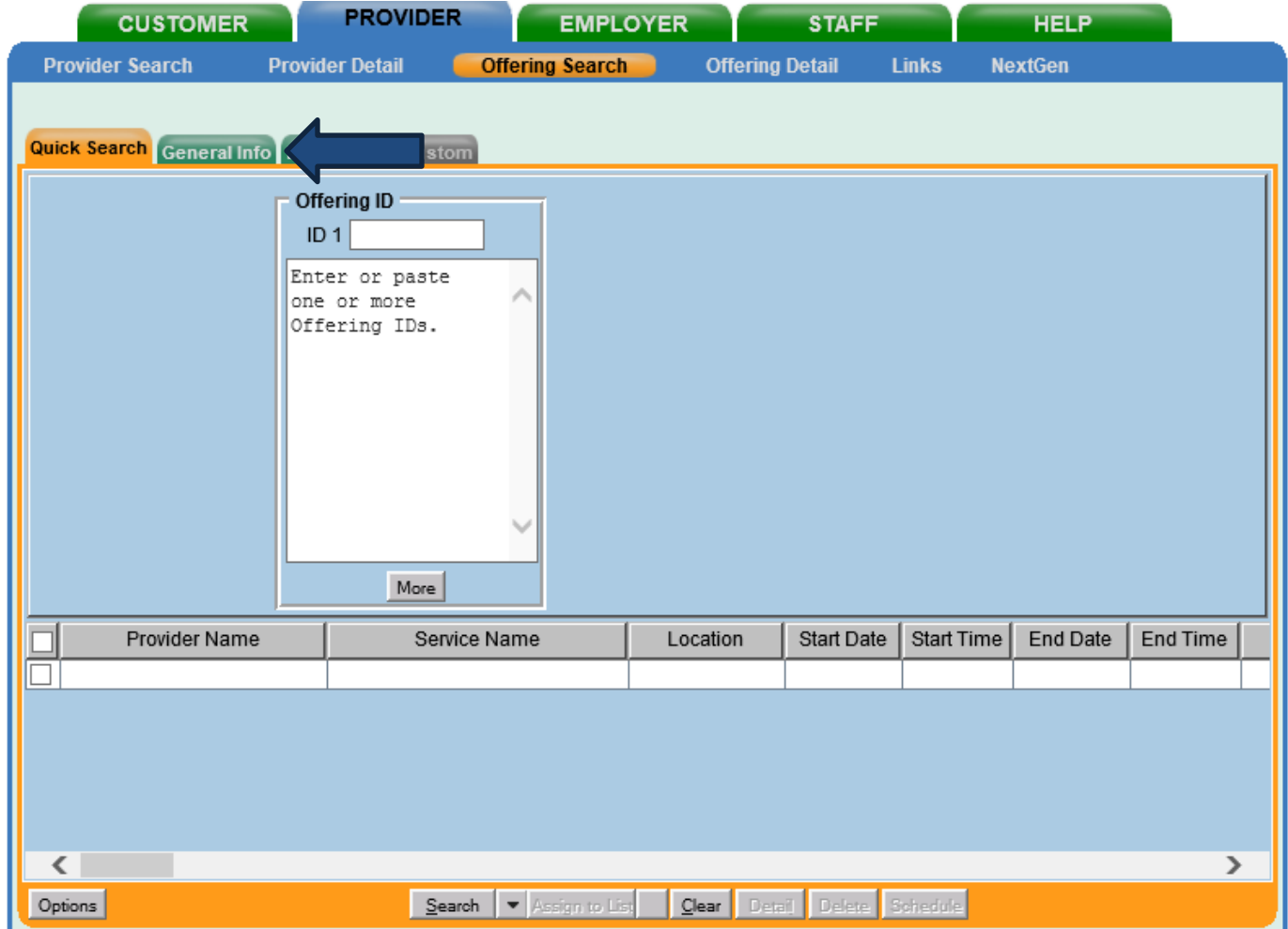
To record a supportive service, first select the **Services** tab.

Then select the **New Service** button.

The screenshot shows the OSOS interface for a customer named Daisy. The 'Services' tab is selected, and the 'New Service' button is highlighted with a blue arrow. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with buttons for Customer Search, Customer Detail, Comp Assess, Services (highlighted), Links, JobZone, and NextGen. The main content area is divided into two sections: 'Detail' and 'Funding'. The 'Detail' section contains various input fields for service information, including Service Name, Service Desc., Service ID, Service Type, Provider Name, Location Name, Provider ID, Offering ID, Plan. Start Date, Plan. End Date, Actual Start Date, Actual End Date, Completed Successfully, Next Contact Date, Program Service Type, Part Time Learn., and Distance Learn. The 'Funding' section contains a table with columns for Level, Source, Obligated, Actual, and Oblig #, and several input fields for Total Funding, Petition #, Waiver Reason, RR Event #, and Incumbent Worker Training. At the bottom of the interface, there are buttons for Options, Print List, New Service (highlighted with a blue arrow), Authorization, IPA Service Summary, Payments, and Tracking. Below these are buttons for Save, Customer Detail, Comp Assess, and Comments.



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



Offering ID

ID 1

Enter or paste one or more Offering IDs.

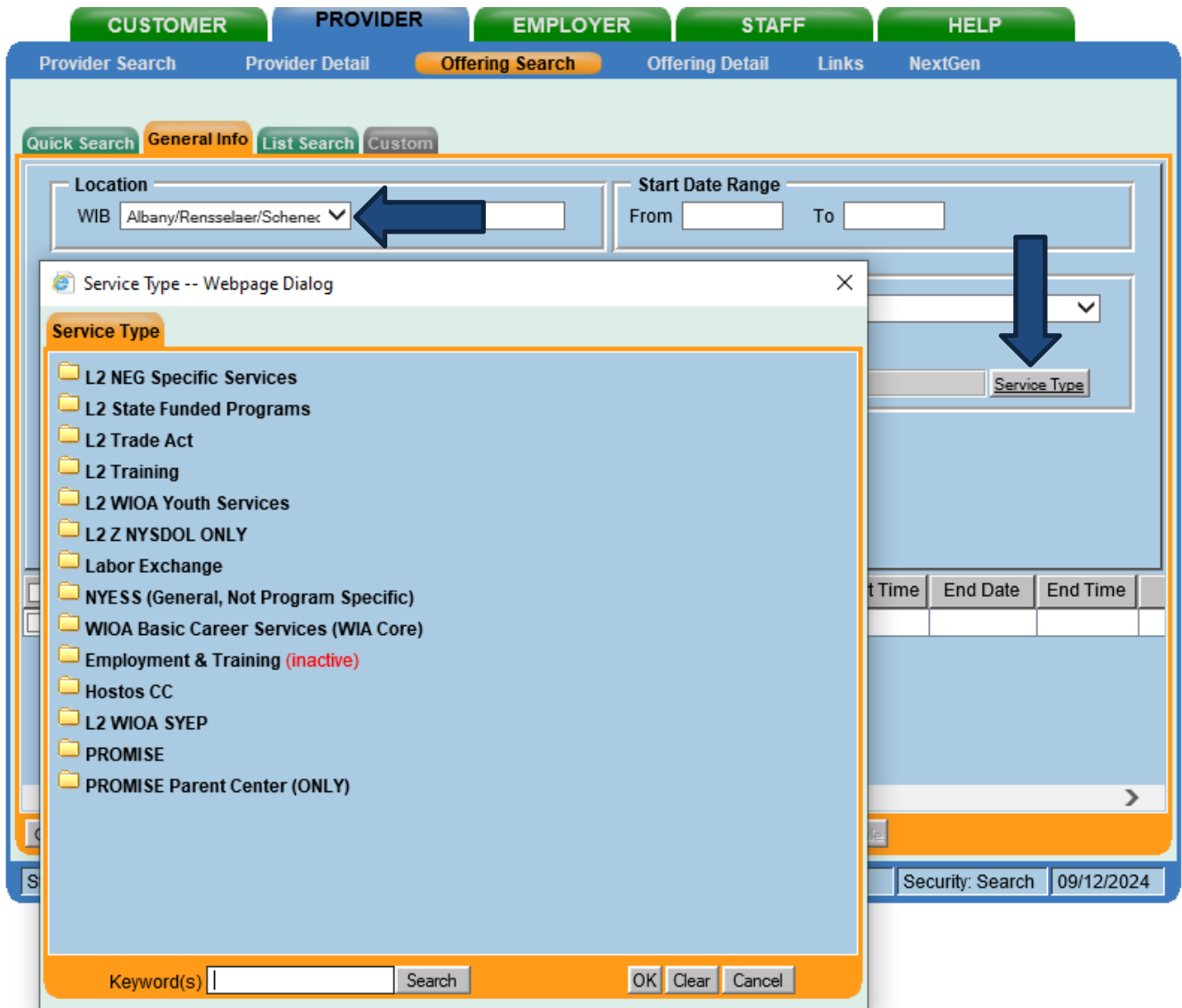
More

<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>							

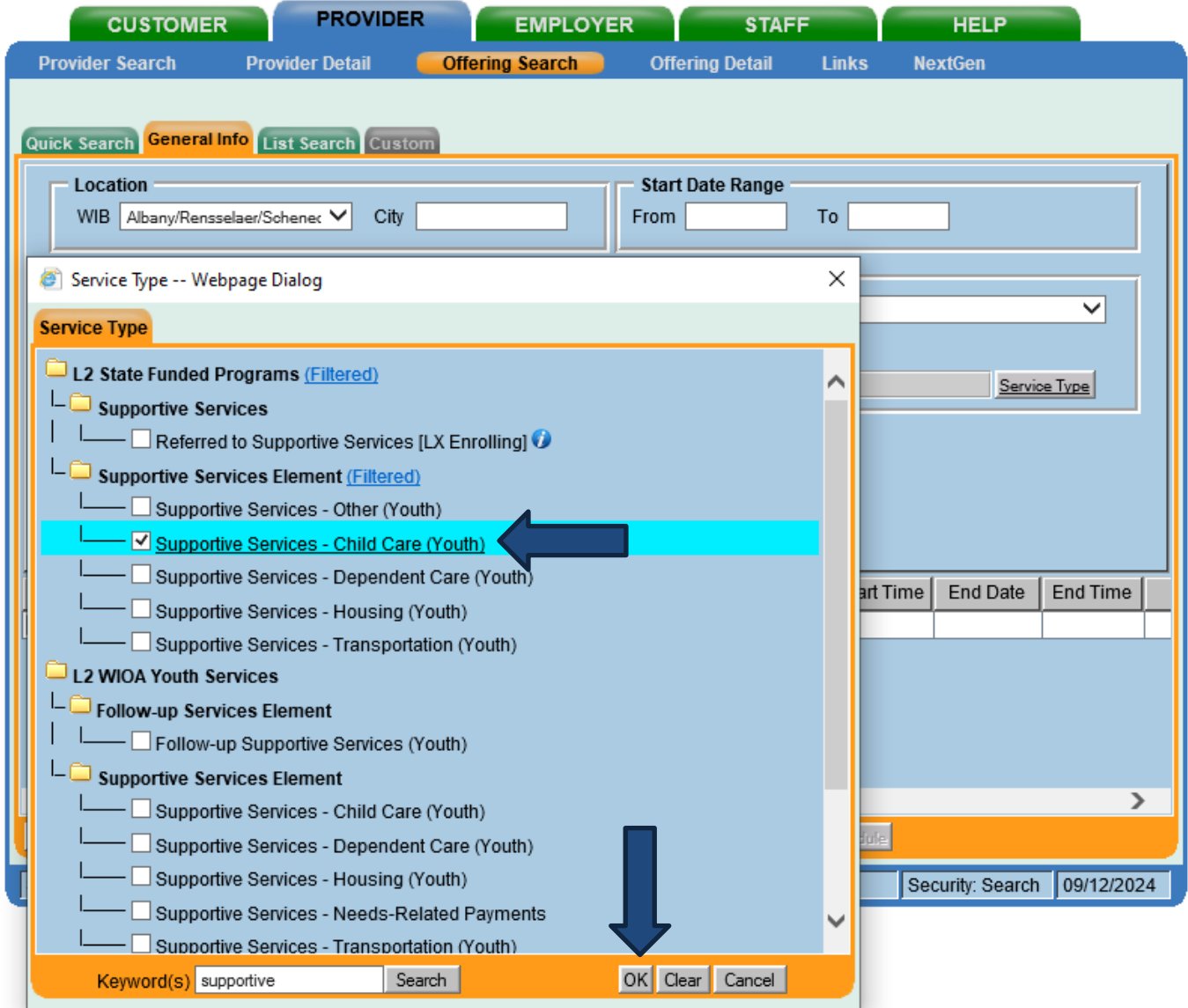
Options Search Assign to List Clear Detail Delete Schedule

Verify the correct **WIB** is selected.

Click the **Service Type** button to bring up a new webpage dialog box.



Select the corresponding **Supportive Service Type** being provided to the participant and click **OK**.



The screenshot displays the OSOS software interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (active), Offering Detail, Links, and NextGen. A secondary set of tabs includes Quick Search, General Info (active), List Search, and Custom. The main search area contains fields for Location (WIB Albany/Rensselaer/Schenec), City, and Start Date Range (From, To). A 'Service Type -- Webpage Dialog' window is open, showing a tree view of service categories. The 'Supportive Services - Child Care (Youth)' option is selected and highlighted in blue. A blue arrow points to this selection. Another blue arrow points to the 'OK' button at the bottom of the dialog. The dialog also includes a 'Keyword(s)' field with 'supportive' entered and buttons for Search, OK, Clear, and Cancel. The background window shows a table with columns for Start Time, End Date, and End Time, and a 'Security: Search' button with the date 09/12/2024.

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

CUSTOMER
PROVIDER
EMPLOYER
STAFF
HELP

Provider Search
Provider Detail
Offering Search
Offering Detail
Links
NextGen

1 - 5 of 5

Quick Search
General Info
List Search
Custom

**Location**

WIB Albany/Rensselaer/Schenec

**Start Date Range**

From  To

**Provider Information**

Provider Name  Service Name  Program

Provider Status Active

Service Type Supportive Services - Child Care (Youth) Service Type

<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>	Albany Career Central One S	Supportive Services - Child Care	Albany Career C				14
<input type="checkbox"/>	Boys & Girls Club of Schened	Supportive Services - Child Care	Adeline Wright G				14
<input type="checkbox"/>	City of Albany Dept. of Youth a	Child Care Assistance	Headquarters				14
<input type="checkbox"/>	Equinox	Child Care Assistance	Headquarters				14
<input type="checkbox"/>	Saint Anne Institute	Child Care Assistance	Headquarters				14


Options
Search
Assign to List
Clear
Detail
Delete
Schedule

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

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

CUSTOMER **PROVIDER** EMPLOYER STAFF HELP

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

1 - 5 of 5 

Quick Search **General Info** List Search Custom

**Location**

WIB Albany/Rensselaer/Schenec City

**Start Date Range**

From  To

**Provider Information**

Provider Name     Service Name     Program ▼  
 Provider Status Active  
 Service Type Supportive Services - Child Care (Youth) Service Type

<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>	Albany Career Central One S	Supportive Services - Child Care	Albany Career C				14
<input checked="" type="checkbox"/>	Boys & Girls Club of Schenec	Supportive Services - Child Care	Adeline Wright G				14
<input type="checkbox"/>	City of Albany Dept. of Youth &	Child Care Assistance	Headquarters				14
<input type="checkbox"/>	Equinox	Child Care Assistance	Headquarters				14
<input type="checkbox"/>	Saint Anne Institute	Child Care Assistance	Headquarters				14

<  >

Options    Search    Assign to List    Clear    Detail    Delete    **Schedule**





This brings you to the **Customer** module, **Services** window, **Services** tab. Select the Supportive 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 supportive service provided is ongoing, do not enter an **Actual End Date** until the supportive service is complete. 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 Supportive Service.

**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

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

Outcomes, Daisy SSN: \*\*\*-\*\*-9564 OSOS ID: NY016844003

<< < Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcomes Commer > >>

**Detail**

Service ID 142572

Service Type Supportive Services - Child Care (Youth)

Provider Name Boys & Girls Club of Schenectady

Location Name Adeline Wright Graham Clubhouse

Provider ID 89514 Offering ID 143128

Plan. Start Date 09/09/2024 Plan. End Date 06/06/2025

Actual Start Date 09/09/2024 Actual End Date

Completed Successfully

Next Contact Date 01/10/2025

Program Service Type

Part Time Learn. Distance Learn.

Program

Minimum Hours Number of Weeks

**Funding**

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

Total Funding  Add Edit Delete

Petition #

RR Event #

Incumbent Worker Training

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Braathe Enterprises	Introduction to Project Management	09/12/2024		ITA-Training
<input checked="" type="checkbox"/>	Boys & Girls Club of Schenectady	Supportive Services - Child Care	09/09/2024		

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

Save Customer Detail Comp Assess Comments



Choose an appropriate **Program Service Type**. For Supportive Services **Individualized Career Services** will be used. As previously mentioned, **Individualized Career Services** would be used for, work experience, individualized service strategy, supportive services, etc.

Click the **Save** button.

**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

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

Outcomes, Daisy SSN: \*\*\*-\*\*-9564 OSOS ID: NY016844003

« < Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcomes Commer > >>

**Detail**

Provider Name: Boys & Girls Club of Schenectady  
 Location Name: Adeline Wright Graham Clubhouse  
 Provider ID: 89514 Offering ID: 143128  
 Plan. Start Date: 09/09/2024 Plan. End Date: 06/06/2025  
 Actual Start Date: 09/09/2024 Actual End Date:   
 Completed Successfully:   
 Next Contact Date: 01/10/2025  
**Program Service Type:** Individualized Career Services  
 Part Time Learn. Distance Learn.   
 Program:   
 Minimum Hours Number of Weeks   
 O\*Net NAICS

**Funding**

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

Total Funding: Add Edit Delete  
 Petition #  
 RR Event #  
 Incumbent Worker Training

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Braathe Enterprises	Introduction to Project Management	09/12/2024		ITA-Training
<input checked="" type="checkbox"/>	Boys & Girls Club of Schenectady	Supportive Services - Child Care	09/09/2024		Individualized Career Se

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

**Save** Customer Detail Comp Assess Comments



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

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

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

Outcomes, Daisy   SSN: \*\*\*-\*\*-9564   OSOS ID: NY016844003

<< < Achievement Objectives   **Services**   Service History   Enrollments   Outcomes   Empl. Outcomes   Trng. Outcomes   Comment > >>

**Detail**

Part Time Learn.  Distance Learn.

Program

Minimum Hours  Number of Weeks

O\*Net  O\*Net

NAICS  NAICS

Min. Prog. Agreed

Achv. Objective

Staff Assigned DUPUIS, JESSICA

WIB Assigned Albany/Rensselaer/Schenectady Co

Agency Department of Labor

Office ALBANY

Orig. Obligation  Total Obligation \$ 0.00

Offering Cost \$ 1.00 Actual Cost

**Funding**

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

Total Funding \$ 1.00

Petition #

RR Event #

Incumbent Worker Training

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Braathe Enterprises	Introduction to Project Management	09/12/2024		ITA-Training
<input checked="" type="checkbox"/>	Boys & Girls Club of Schenectady	Supportive Services - Child Care	09/09/2024		Individualized Career Se

Options   Print List   New Service   Delete Service   Authorization   IPA Service Summary   Payments   Tracking





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

Select the **Renewable Energy Training Initiative** funding.

Enter 1 in the **Obligated Amount** field. This will automatically populate the **Obligated Percentage** field as \$1.00 or 100.

Click **OK**.

The screenshot shows the OSOS interface with the 'Funding -- Webpage Dialog' box open. The dialog box contains a table of funding sources and fields for Obligated Amount and Obligated Percentage. Arrows point to the 'Renewable Energy Training Initiative' row and the 'Obligated Amount' field.

Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	WIB WIOA Adult Local	2022	\$ 99988.00	
<input type="checkbox"/>	WIB WIOA Adult Local	2023	\$ 99993.00	
<input type="checkbox"/>	WIB WIOA Adult Local	2024	\$ 100000.00	
<input type="checkbox"/>	WIB WIOA Dislocated Worker Local	2022	\$ 99996.00	
<input type="checkbox"/>	WIB WIOA Dislocated Worker Local	2023	\$ 99995.00	
<input type="checkbox"/>	WIB WIOA Dislocated Worker Local	2024	\$ 99999.00	
<input type="checkbox"/>	WIB Youth Statewide 15%	2022	\$ 99999.00	
<input type="checkbox"/>	WIB Youth Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WIB Youth Statewide 15%	2024	\$ 100000.00	
<input type="checkbox"/>	WIB Dislocated Worker Statewide 15%	2022	\$ 100000.00	
<input type="checkbox"/>	WIB Dislocated Worker Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WIB Dislocated Worker Statewide 15%	2024	\$ 100000.00	
<input type="checkbox"/>	WIB Adult Statewide 15%	2022	\$ 100000.00	
<input type="checkbox"/>	WIB Adult Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WIB Adult Statewide 15%	2024	\$ 100000.00	
<input type="checkbox"/>	State DHP State Funded	2023	\$ 99984.00	
<input type="checkbox"/>	State PROWD First Step Act	2024	\$ 100000.00	
<input type="checkbox"/>	State PROWD WIOA	2024	\$ 100000.00	
<input checked="" type="checkbox"/>	WIB Renewable Energy Training Initiative	2024	\$ 99999.00	

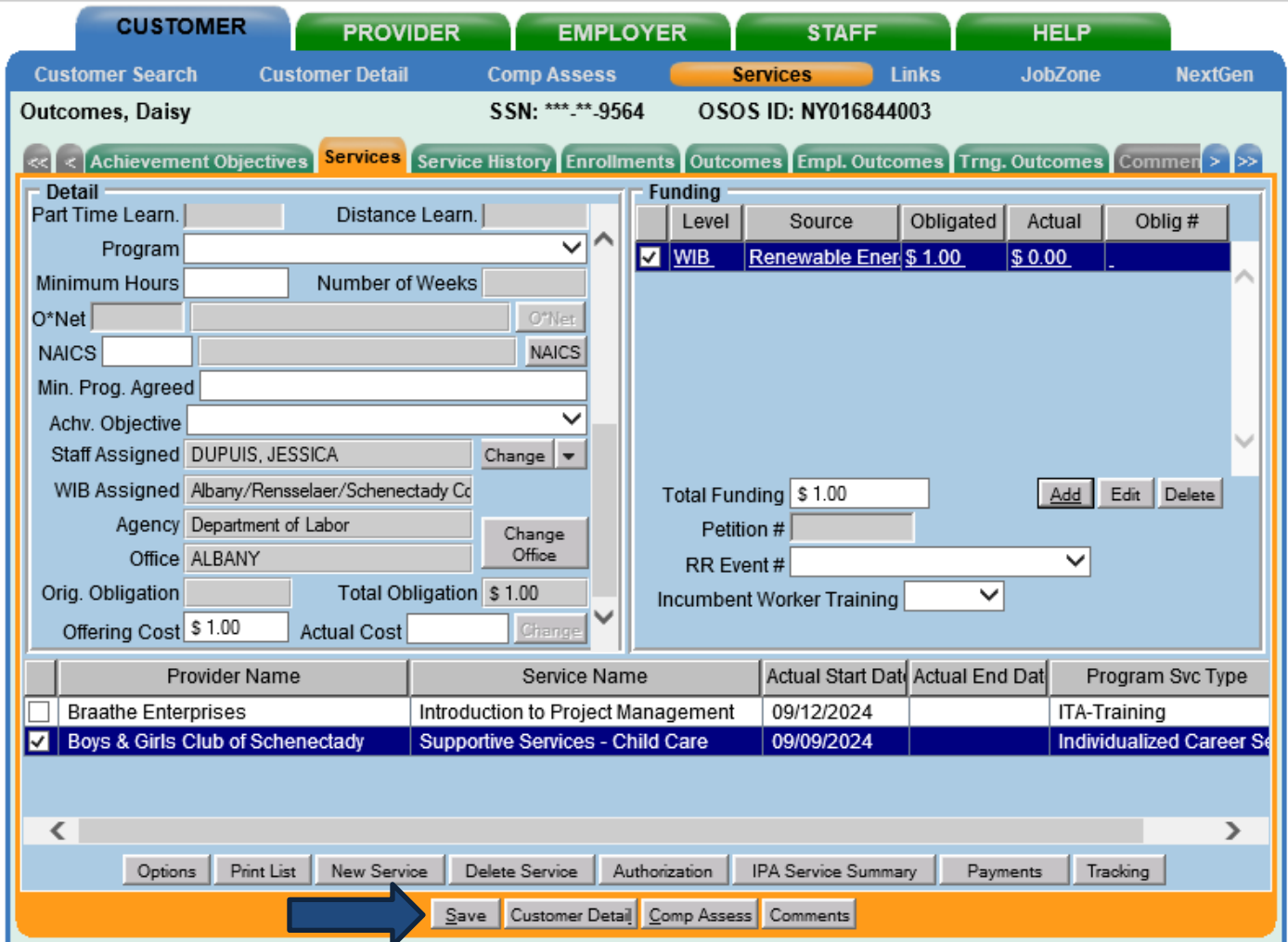
Obligated Amount \$ 1.00 x  
OR  
Obligated Percentage 100

Office ALBANY  
Region Capital District

OK Cancel

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

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



**CUSTOMER** | PROVIDER | EMPLOYER | STAFF | HELP

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

Outcomes, Daisy | SSN: \*\*\*-\*\*-9564 | OSOS ID: NY016844003

<< < Achievement Objectives | **Services** | Service History | Enrollments | Outcomes | Empl. Outcomes | Trng. Outcomes | Commer > >>

**Detail**

Part Time Learn.  Distance Learn.

Program

Minimum Hours  Number of Weeks

O\*Net  O\*Net

NAICS  NAICS

Min. Prog. Agreed

Achv. Objective

Staff Assigned DUPUIS, JESSICA

WIB Assigned Albany/Rensselaer/Schenectady Cc

Agency Department of Labor

Office ALBANY

Orig. Obligation  Total Obligation \$ 1.00

Offering Cost \$ 1.00 Actual Cost

**Funding**

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/> WIB	Renewable Ener	\$ 1.00	\$ 0.00	.

Total Funding \$ 1.00

Petition #

RR Event #

Incumbent Worker Training

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Braathe Enterprises	Introduction to Project Management	09/12/2024		ITA-Training
<input checked="" type="checkbox"/>	Boys & Girls Club of Schenectady	Supportive Services - Child Care	09/09/2024		Individualized Career Se



## 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, **Services** window, **Services** tab. 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.

**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

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

Outcomes, Daisy SSN: \*\*\*-\*\*-9564 OSOS ID: NY016844003

<< < Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcomes Comment > >>

Detail		Funding				
Service ID	128275	Level	Source	Obligated	Actual	Oblig #
Service Type	Occupational Skills Training	<input type="checkbox"/>	WIB	Renewable Ener	\$ 1.00	\$ 0.00
Provider Name	Braathe Enterprises					
Location Name	Braathe Enterprises					
Provider ID	83060	Offering ID	131925			
Plan. Start Date	09/12/2024	Plan. End Date	09/12/2025			
Actual Start Date	09/12/2024	Actual End Date				
Completed Successfully	<input type="button" value="Completed Successfully"/>					
Next Contact Date	01/13/2025					
Program Service Type	ITA-Training					
Part Time Learn.	Yes	Distance Learn.	No			
Program						
Minimum Hours		Number of Weeks				
Total Funding		\$ 1.00	<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>			
Petition #						
RR Event #						
Incumbent Worker Training						

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/>	Braathe Enterprises	Introduction to Project Management	09/12/2024		ITA-Training

Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

## OUTCOMES

Employment and training outcomes for local RETI participants must be recorded in the Employment Outcomes and Training Outcomes tabs of OSOS.

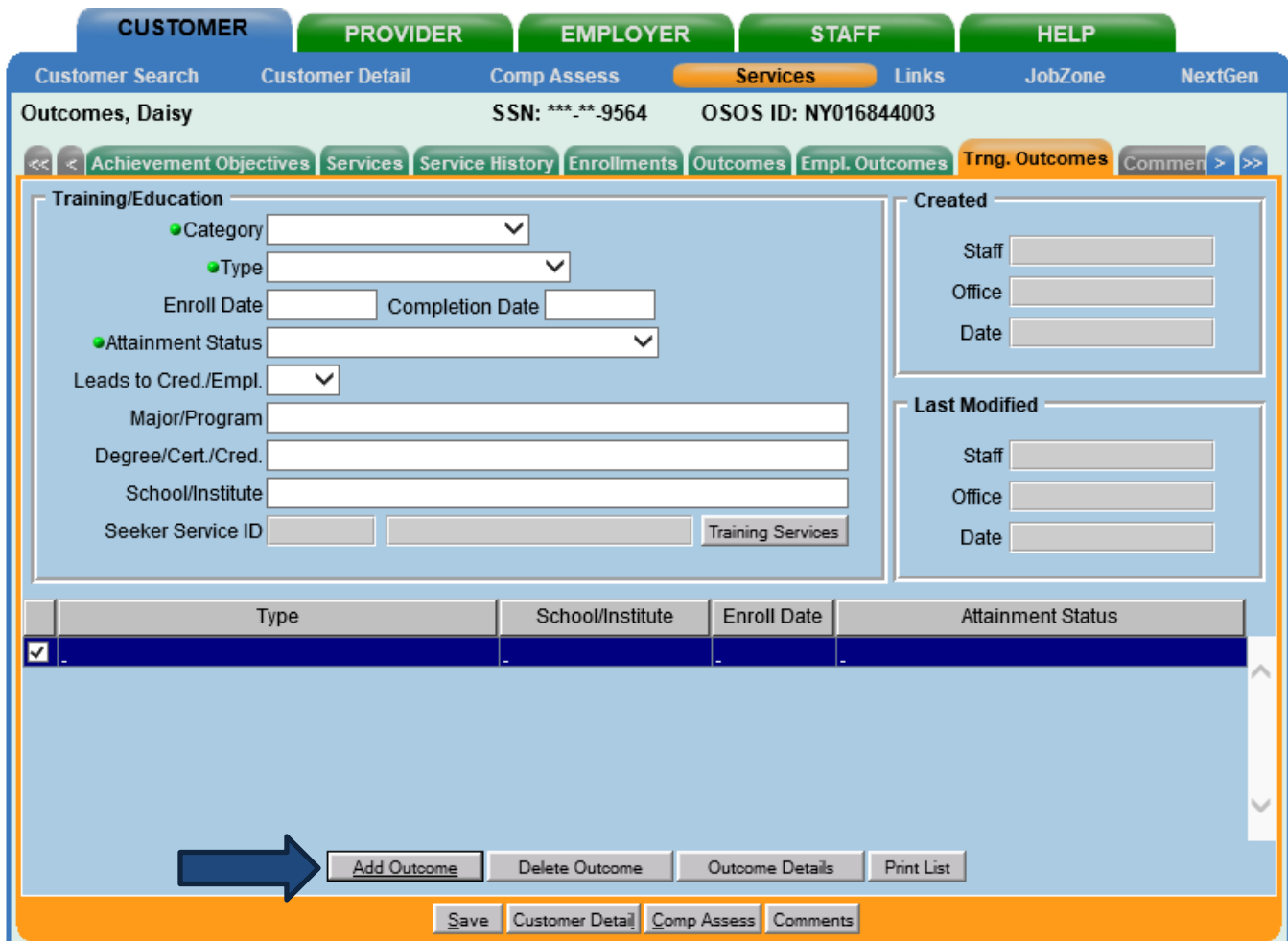


*Please note that if a participant is served solely under this initiative, the participants will not be counted in local performance measures and information entered in these tabs will not impact performance numbers. However, if the participant is co-enrolled in WIOA, they will be included in all applicable local and state performance measures. In this case, all outcome information must be entered per the [WIOA Performance Measures and Outcomes OSOS Guide](#).*

## TRAINING OUTCOMES

When a participant has successfully completed training, it must be noted in the **Trng. Outcomes** tab in the **Services** window.

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



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

Outcomes, Daisy SSN: \*\*\* \*\* -9564 OSOS ID: NY016844003

Achievement Objectives Services Service History Enrollments Outcomes Empl. Outcomes **Trng. Outcomes** Commer

**Training/Education**

- Category
- Type
- Enroll Date  Completion Date
- Attainment Status
- Leads to Cred./Empl.
- Major/Program
- Degree/Cert./Cred.
- School/Institute
- Seeker Service ID    Training Services

**Created**

- Staff
- Office
- Date

**Last Modified**

- Staff
- Office
- Date

Type	School/Institute	Enroll Date	Attainment Status
<input checked="" type="checkbox"/>	-	-	-

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

Save Customer Detail Comp Assess Comments

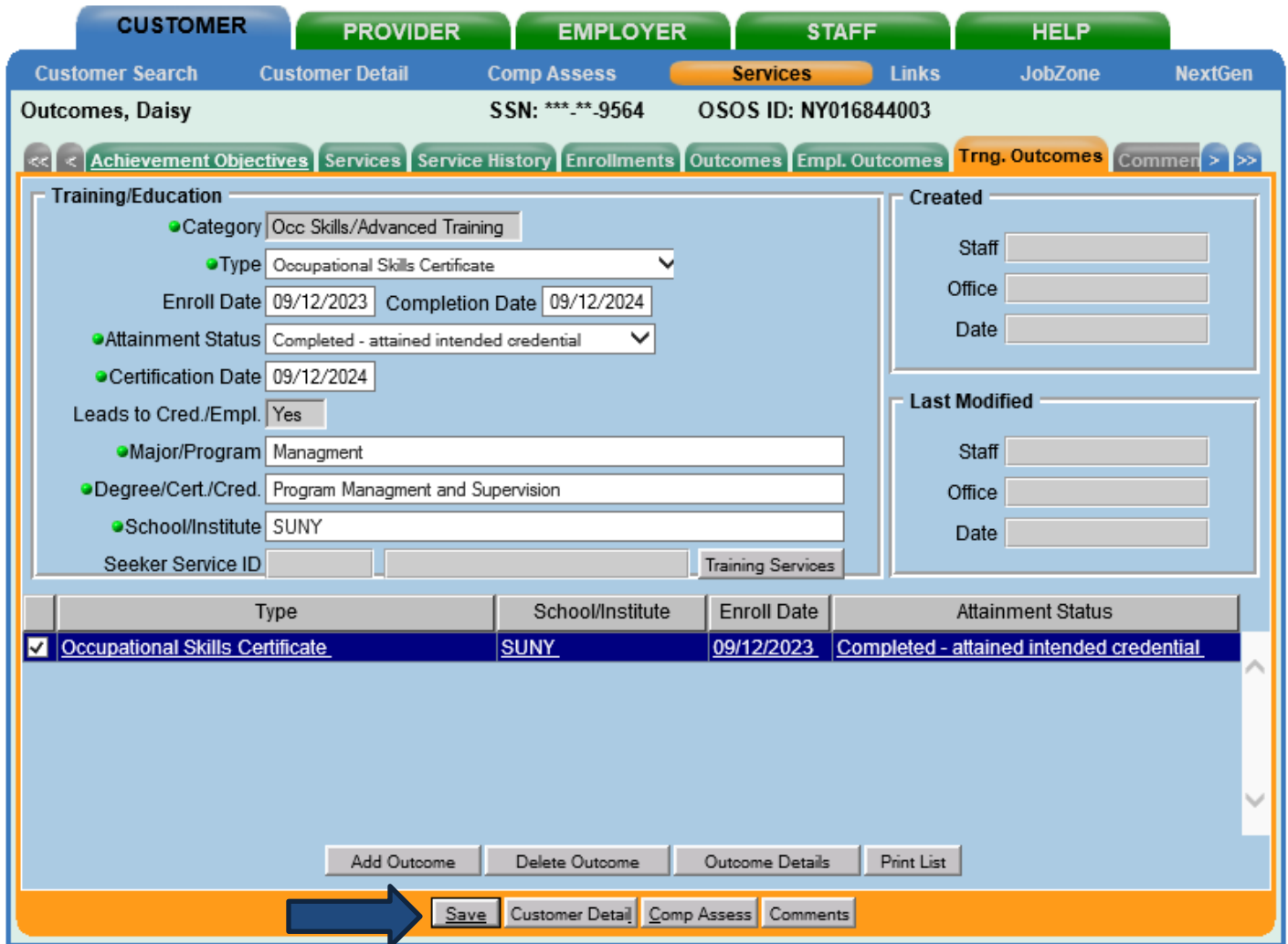
Enter the **Category** and **Type** of the Credential earned due to the completed training.

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

Enter the **Attainment Status** of "Completed - attained intended credential."

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

Click **Save**.



**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

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

Outcomes, Daisy SSN: \*\*\*-\*\*-9564 OSOS ID: NY016844003

Achievement Objectives Services Service History Enrollments Outcomes **Empl. Outcomes** Trng. Outcomes

**Training/Education**

- Category: Occ Skills/Advanced Training
- Type: Occupational Skills Certificate
- Enroll Date: 09/12/2023 Completion Date: 09/12/2024
- Attainment Status: Completed - attained intended credential
- Certification Date: 09/12/2024
- Leads to Cred./Empl.: Yes
- Major/Program: Managment
- Degree/Cert./Cred.: Program Managment and Supervision
- School/Institute: SUNY
- Seeker Service ID: [ ] Training Services

**Created**

Staff: [ ]  
Office: [ ]  
Date: [ ]

**Last Modified**

Staff: [ ]  
Office: [ ]  
Date: [ ]

Type	School/Institute	Enroll Date	Attainment Status
<input checked="" type="checkbox"/> Occupational Skills Certificate	SUNY	09/12/2023	Completed - attained intended credential

Add Outcome Delete Outcome Outcome Details Print List

**Save** Customer Detail Comp Assess Comments



## EMPLOYMENT OUTCOMES

When a participant obtains employment, this must be recorded in the **Empl. Outcomes** tab in the **Services** window of OSOS.

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

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

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

Outcomes, Daisy SSN: \*\*\*-\*\*-9564 OSOS ID: NY016844003

<< < Achievement Objectives Services Service History Enrollments Outcomes **Empl. Outcomes** Trng. Outcomes Comment > >>

**Employment**

Type  Start Date  End Date

Employer EIN/ID

Employer Name

NAICS

City  State  Zip

OSOS Job ID  External Job ID  Supervisor

Seeker Service ID

**Characteristics**

Training Related

Non-Traditional

Hired By Layoff

FCJL Job

Work Based Training

Disaster Relief

UI Covered

Fringe Benefits

	Start Date	Employer Name	Employer EIN/ID	NAICS
<input checked="" type="checkbox"/>	-	-	-	-



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**.

**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

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

Outcomes, Daisy SSN: \*\*\*-\*\*-9564 OSOS ID: NY016844003

<< < Achievement Objectives Services Service History Enrollments Outcomes **Empl. Outcomes** Trng. Outcomes Com > >>

**Employment**

Type: Unsubsidized Employment Start Date: 09/13/2024 End Date:

Self Employed: No

Employer EIN/ID: NY010290972 Employer Lookup

Employer Name: SolarCity

NAICS: 54169 Other Scientific and Technical Consulting Services NAICS Lookup

City: Anytown State: New York Zip: 12345

OSOS Job ID:  External Job ID:  Supervisor:

Seeker Service ID:  Employment Services

Audit Manual Wages

**Characteristics**

Training Related: Yes

Non-Traditional: No

Hired By Layoff: Yes

FCJL Job: No

Work Based Training: No

Disaster Relief: No

UI Covered: Yes

Fringe Benefits: Yes

	Start Date	Employer Name	Employer EIN/ID	NAICS
<input checked="" type="checkbox"/>	09/13/2024	SolarCity	NY010290972	Other Scientific and Technical Consulting Serv

Add Outcome Delete Outcome Outcome Details Print List

Save Customer Detail Comp Assess Comments



When the participant wages are known, they must be entered into OSOS.

Click the **Manual Wages** button in the Employment Outcomes tab.

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

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

Outcomes, Daisy SSN: \*\*\*-\*\*-9564 OSOS ID: NY016844003

<< < Achievement Objectives Services Service History Enrollments Outcomes **Empl. Outcomes** Trng. Outcomes Commer > >>

**Employment**

Type: Unsubsidized Employment Start Date: 09/13/2024 End Date:

Self Employed: No

Employer EIN/ID: NY010290972 Employer Lookup

Employer Name: SolarCity

NAICS: 54169 Other Scientific and Technical Consulting Services NAICS Lookup

City: Anytown State: New York Zip: 12345

OSOS Job ID:  External Job ID:  Supervisor:

Seeker Service ID:

Characteristics

Training Related: Yes

Non-Traditional: No

Hired By Layoff: Yes

FCJL Job: No

Work Based Training: No

Disaster Relief: No

UI Covered: Yes

Fringe Benefits: Yes

Manual Wages

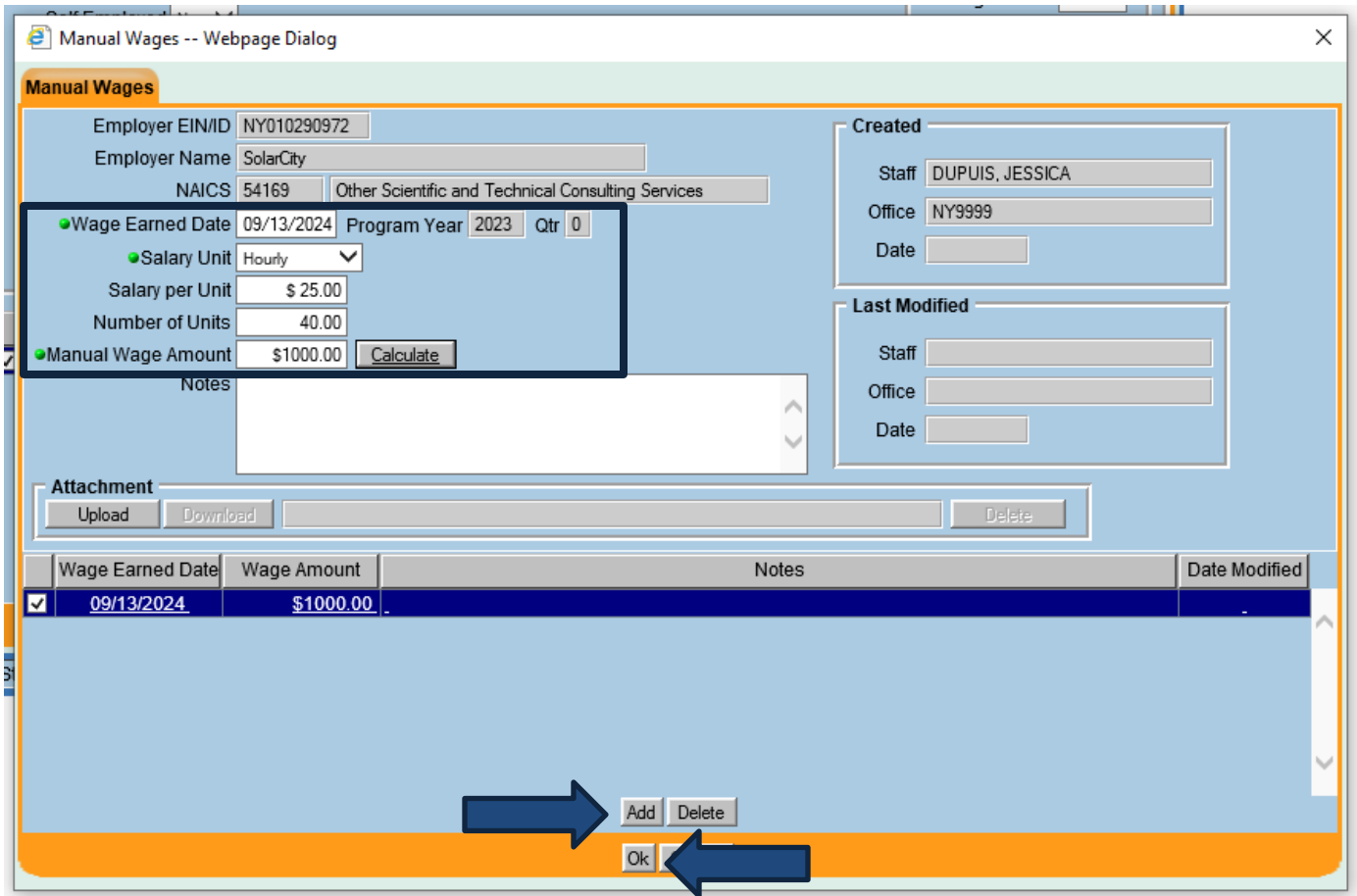
Start Date	Employer Name	Employer EIN/ID	NAICS
<input checked="" type="checkbox"/> 09/13/2024	SolarCity	NY010290972	Other Scientific and Technical Consulting Serv

Add Outcome Delete Outcome Outcome Details Print List

Save Customer Detail Comp Assess Comments



This opens the **Manual Wages** webpage dialog.  
 Click **Add** to open up the fields.  
 Enter the date of the paycheck or wage earned.  
 Enter the Salary Unit, the Salary per Unit, and the Number of Units.  
 Click the **Calculate** button.  
 Click the **OK** button.



**Manual Wages**

Employer EIN/ID: NY010290972  
 Employer Name: SolarCity  
 NAICS: 54169 Other Scientific and Technical Consulting Services

Wage Earned Date: 09/13/2024 Program Year: 2023 Qtr: 0  
 Salary Unit: Hourly  
 Salary per Unit: \$ 25.00  
 Number of Units: 40.00  
 Manual Wage Amount: \$1000.00

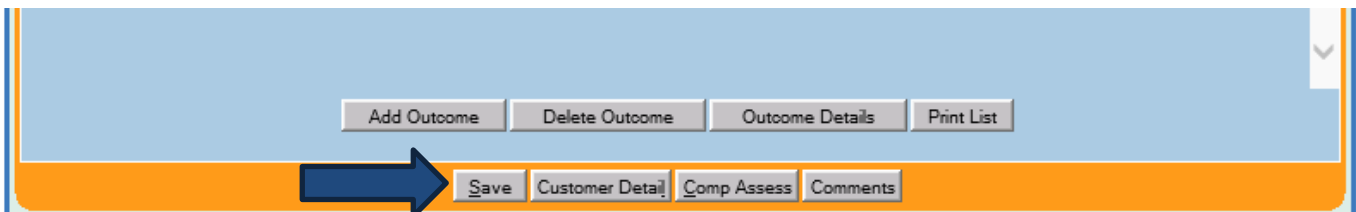
Created: Staff: DUPUIS, JESSICA  
 Office: NY9999  
 Date:

Last Modified: Staff:   
 Office:   
 Date:

Attachment:

	Wage Earned Date	Wage Amount	Notes	Date Modified
<input checked="" type="checkbox"/>	09/13/2024	\$1000.00		

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





## RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found [on the NYS Department of Labor's website](#).

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)