

OYCEA-Long Island OSOS Guide



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PURPOSE

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 Opportunity Youth Career Exploration and Access (OYCEA) Program.

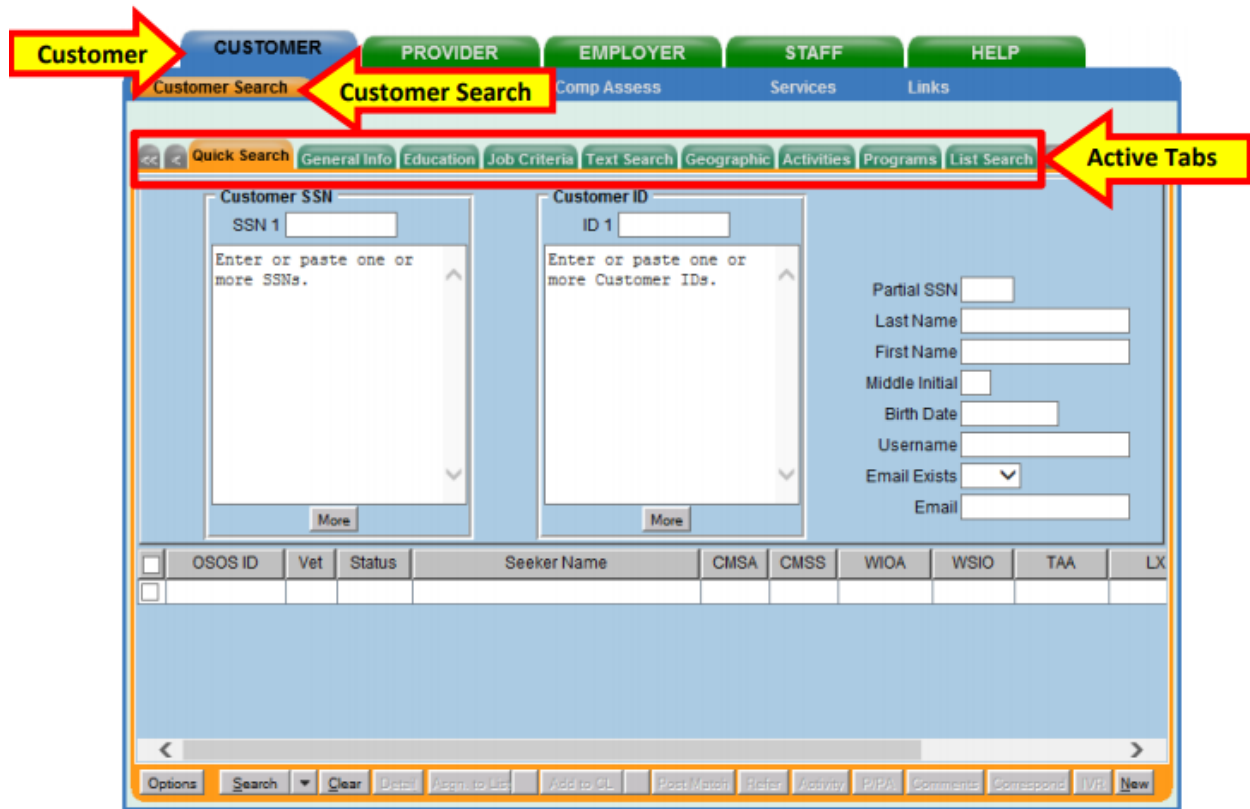
Please see the OYCEA RFP for additional information on the OYCEA Program: [OYCEA RFP](#)

SEARCHING FOR THE CUSTOMER

The first time 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.

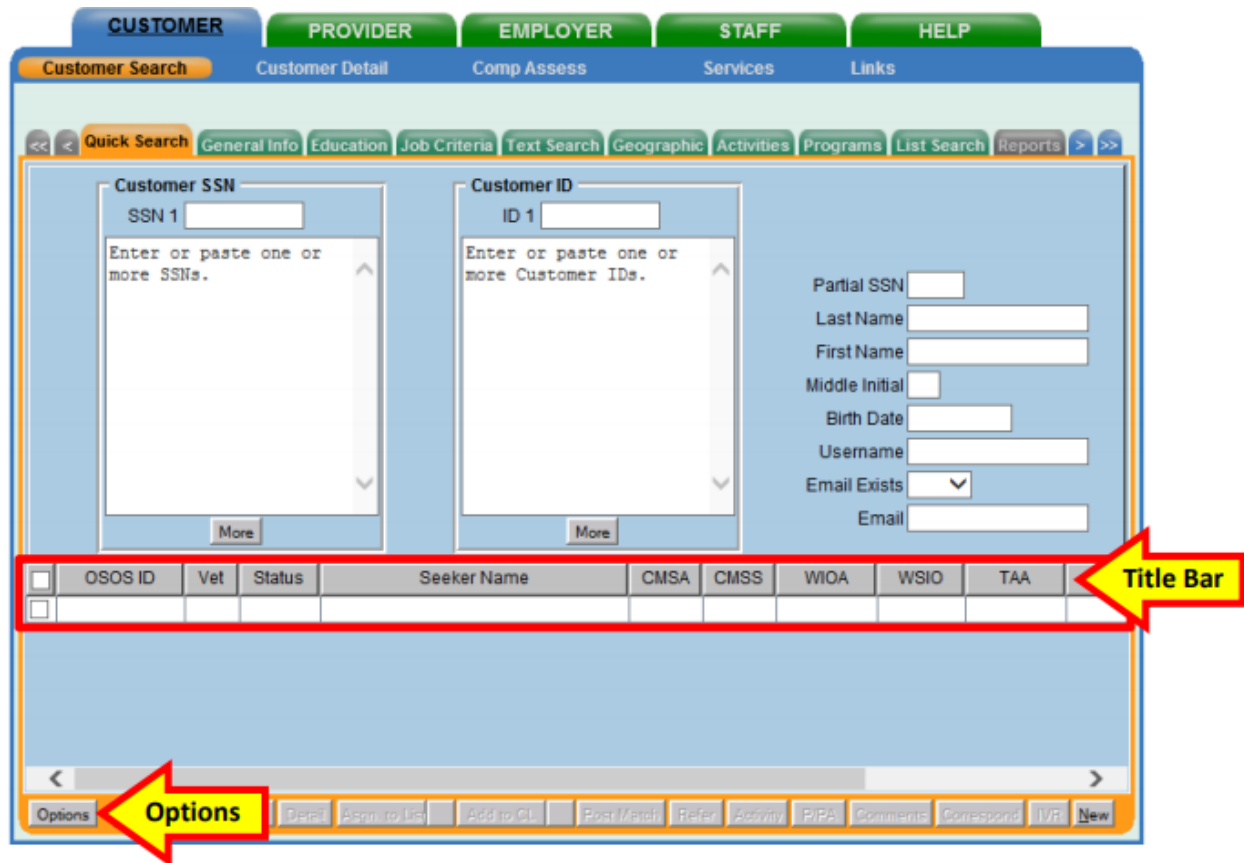


The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: **CUSTOMER**, **PROVIDER**, **EMPLOYER**, **STAFF**, and **HELP**. Below these are sub-tabs: **Customer Search**, **Comp Assess**, **Services**, and **Links**. A yellow arrow points to the **Customer** tab, and another points to the **Customer Search** sub-tab. Below the sub-tabs is a row of search tabs: **Quick Search**, **General Info**, **Education**, **Job Criteria**, **Text Search**, **Geographic**, **Activities**, **Programs**, and **List Search**. A red box highlights these tabs, with a yellow arrow pointing to it labeled **Active Tabs**. The main search area contains two large text input fields: **Customer SSN** (with sub-field **SSN 1**) and **Customer ID** (with sub-field **ID 1**). To the right of these fields are several smaller input fields: **Partial SSN**, **Last Name**, **First Name**, **Middle Initial**, **Birth Date**, **Username**, **Email Exists** (a dropdown menu), and **Email**. Below the input fields is a table with columns: **OSOS ID**, **Vet**, **Status**, **Seeker Name**, **CMSA**, **CMSS**, **WIOA**, **WSIO**, **TAA**, and **LX**. At the bottom of the interface is a toolbar with buttons: **Options**, **Search**, **Clear**, **Detail**, **Assign to List**, **Add to CL**, **Post Match**, **Relist**, **Activity**, **PIPA**, **Comments**, **Respond**, **IVR**, and **New**.

SEARCH OPTIONS

Before conducting a customer search, staff should customize their search options that will be displayed in the **Title Bar**.

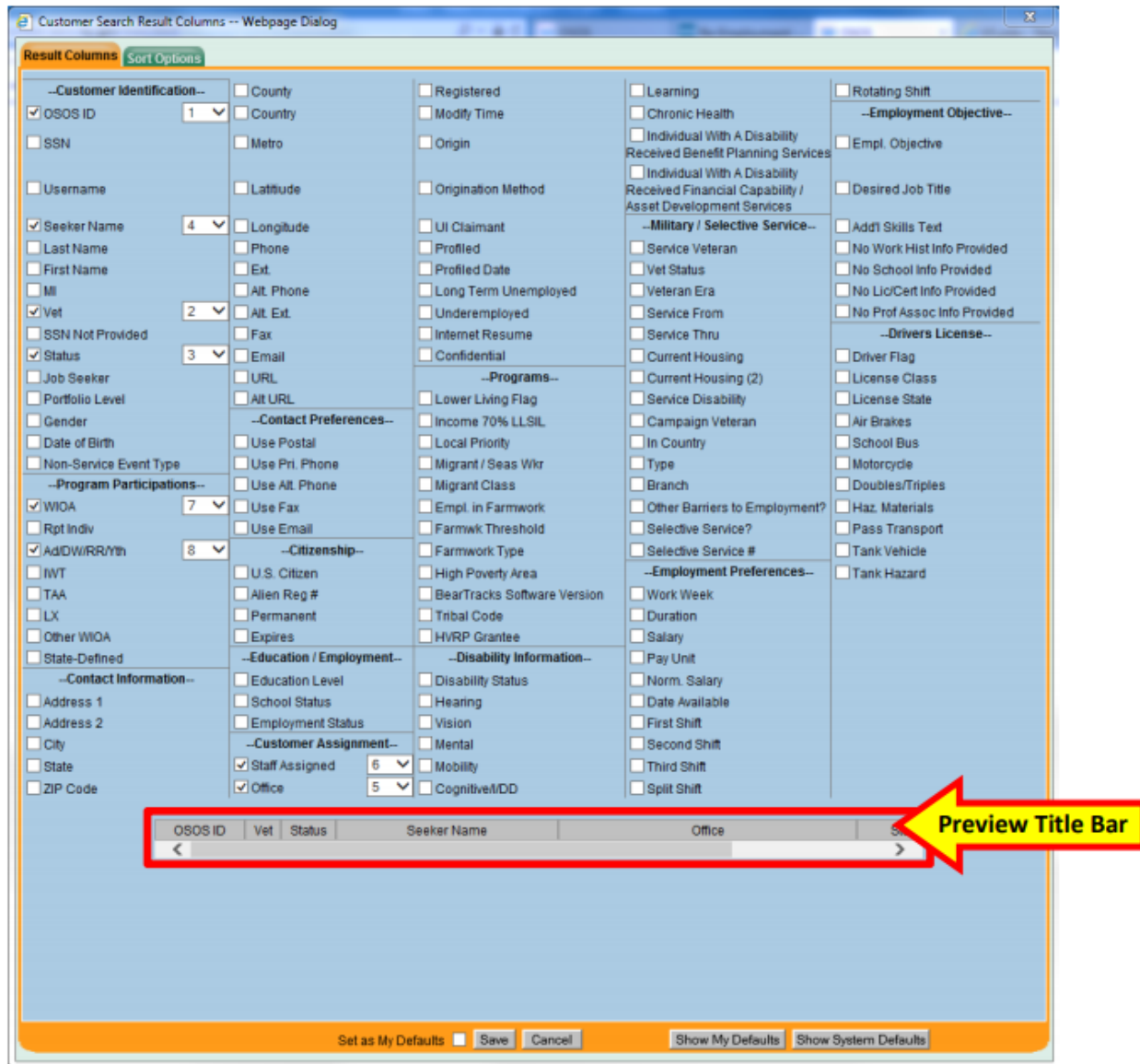
To access the search options, click on the **Options** button at the bottom left of the screen.



The screenshot displays 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, and Links. The main search area includes fields for Customer SSN (SSN 1) and Customer ID (ID 1), both with 'More' buttons. To the right are fields for Partial SSN, Last Name, First Name, Middle Initial, Birth Date, Username, Email Exists (dropdown), and Email. At the bottom, there is a 'Title Bar' with checkboxes for OSOS ID, Vet, Status, Seeker Name, CMSA, CMSS, WIOA, WSIO, and TAA. A red box highlights the 'Options' button at the bottom left and the 'Title Bar' at the bottom right.

The **Customer Search Result Columns** pop-up window displays all the fields that can be added to the title bar. These fields can be selected or de-selected by clicking on the checkbox next to them.

The number to the right of the field name indicates the order in which the fields will be displayed on the title bar. Staff can change this order by manually re-numbering the selected fields or by clicking and dragging the sections in the gray preview title bar at the bottom of the pop-up.



Helpful fields that staff should consider including in their search results are: **OSOS ID, Seeker Name, Status, Date of Birth, and City.**



Seeker Name and Date of Birth are both important fields to include, as staff can use this information to easily identify potential duplicate OSOS records. Duplicate records should be emailed to Help.OSOS@labor.ny.gov

Once staff have selected the fields and the display order that will be most useful to them, click the **Set as My Default** checkbox and then click the **Save** button. This ensures that these settings will remain as the default settings used each time that the staff member runs a customer search in OSOS. These settings can be changed at any time, either to alter the defaults or to run a single search.

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**.

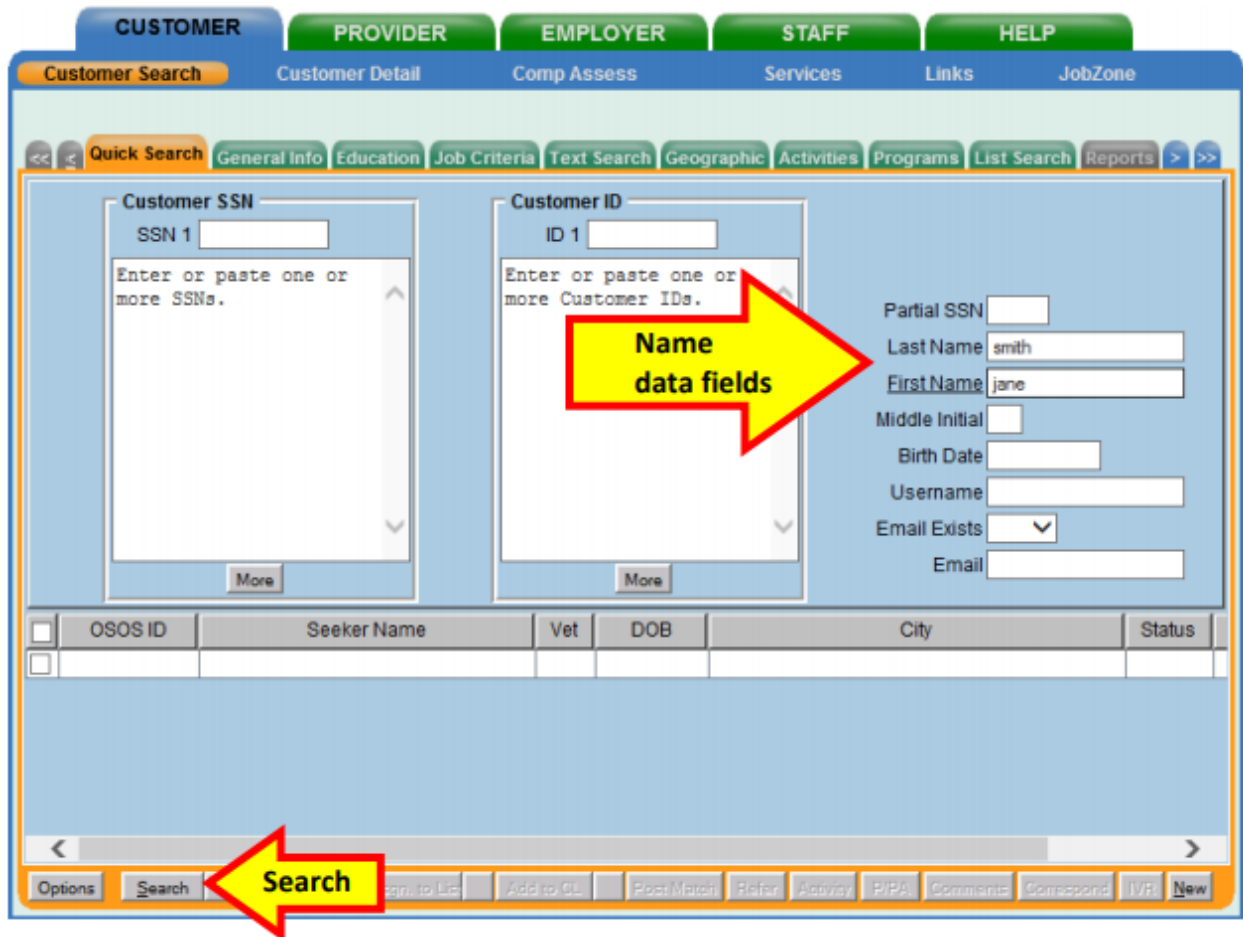
SEARCHING BY CUSTOMER FULL OR PARTIAL NAME

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.



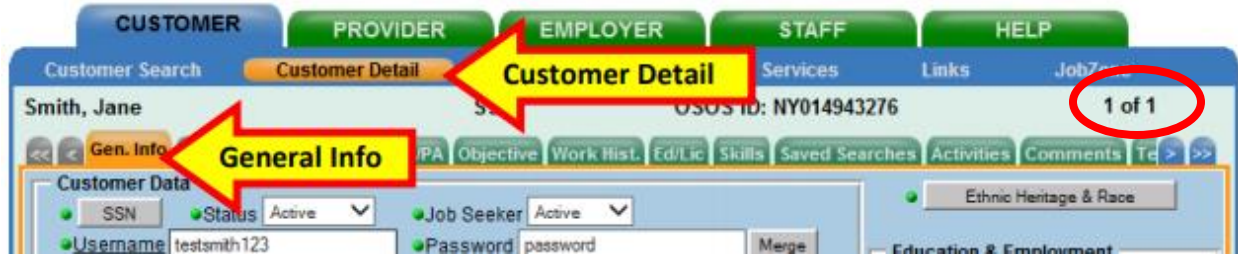
As a best practice, staff should perform a name search for any customer they are working with to determine if duplicate OSOS records exist for the same customer. If a duplicate record is found, please contact help.osos@labor.ny.gov

Click the **Search** button.

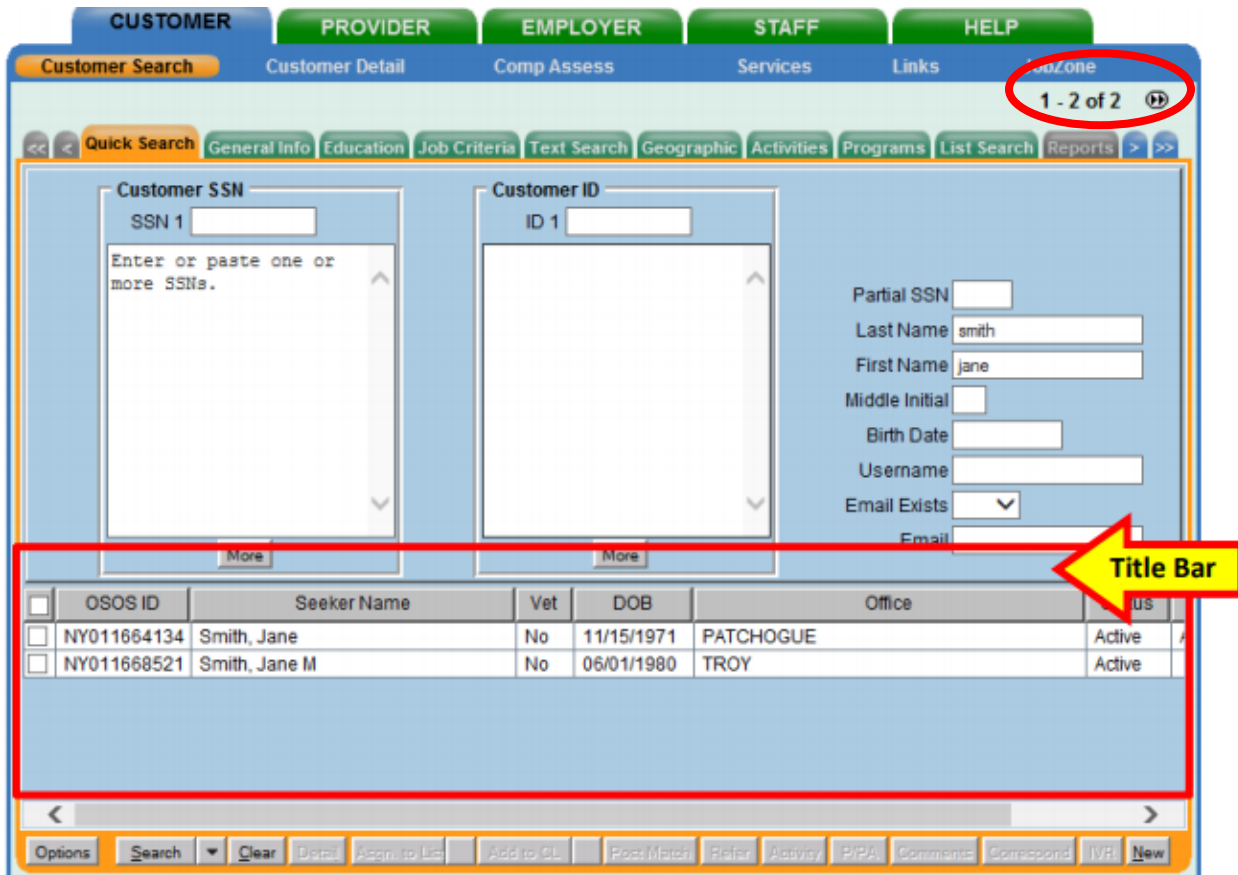


The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The 'Quick Search' sub-tab is selected, showing various search options like General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, and Reports. The main search area contains two large text input fields for 'Customer SSN' (SSN 1) and 'Customer ID' (ID 1), each with a 'More' button below. To the right, there are smaller input fields for 'Partial SSN', 'Last Name' (containing 'smith'), 'First Name' (containing 'jane'), 'Middle Initial', 'Birth Date', 'Username', 'Email Exists' (a dropdown menu), and 'Email'. A yellow arrow points to the 'Last Name' and 'First Name' fields, labeled 'Name data fields'. At the bottom of the form, there is a 'Search' button, also highlighted with a yellow arrow. Below the search fields is a table with columns: OSOS ID, Seeker Name, Vet, DOB, City, and Status. The table is currently empty. At the very bottom, there is a row of buttons: Options, Search, Sign. to LIC, 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.

<input type="checkbox"/>	OSOS ID	DOB	Status	Office
<input checked="" type="checkbox"/>	NY015298310	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298309	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298322	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298317	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298312	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298308	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298320	01/01/19	Active	Schenectady County Career Center
<input checked="" type="checkbox"/>	NY015298323	01/01/19	Active	Uniondale Union Free School District

Options Search Clear Detail Post Match Refer Activity P/PA Comments Correspond IVR New

Select All

Detail



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 CareerZone

Smith, Jane SSN: OSOS ID: NY01 **Toggle Arrows** 1 of 4

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

Customer Data

- SSN: testsmith123
- Status: Active
- Job Seeker: Active
- Username: testsmith123
- Password: password
- Last Name: Smith
- First Name: Jane
- MI: MI
- Date of Birth: 06/01/1980
- Gender: Female
- Portfolio Lvl: JobZone Adult
- Address: 123 Main Street
- City: Albany
- State: New York
- Zip: 12206
- County: Albany
- Country: United States
- Metro: Metro
- Phone: 518-555-5555
- Email: janesmith@test.edu
- URL:
- U.S. Citizen:

Enrollments: JZ/CZ Manager Add to Case Load

Customer Assignment

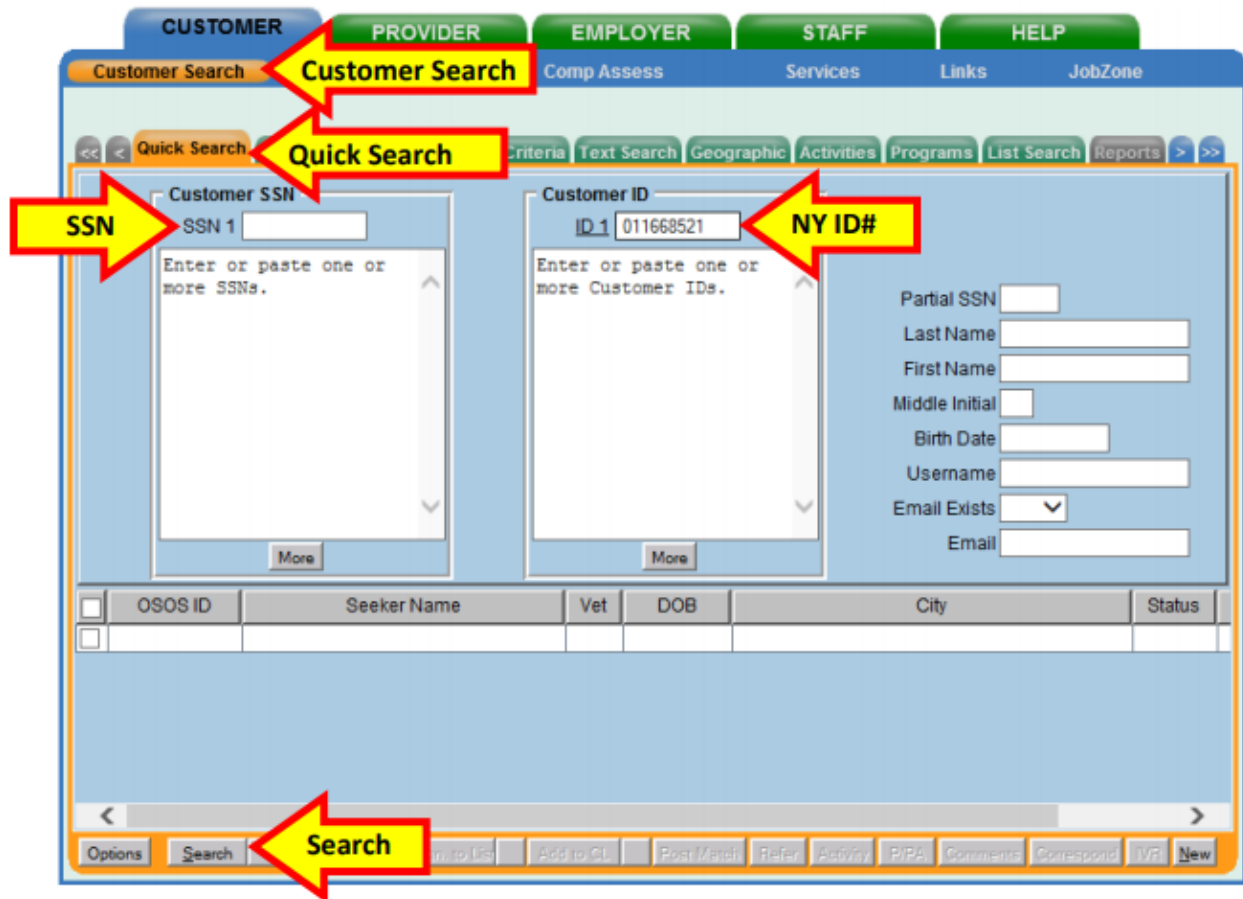
- Staff Assigned: [] Change
- WIB Assigned: Albany/Rensselaer/Schenectady Counties
- Agency: Department of Labor
- Office: ALBANY
- UI Claimant: [] Work Search Record
- Registered: 03/08/2017
- Origin: Staff
- Profiled: []
- Profiled Date: []
- Internet Resume: Confidential:

Save Start Match Services 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.

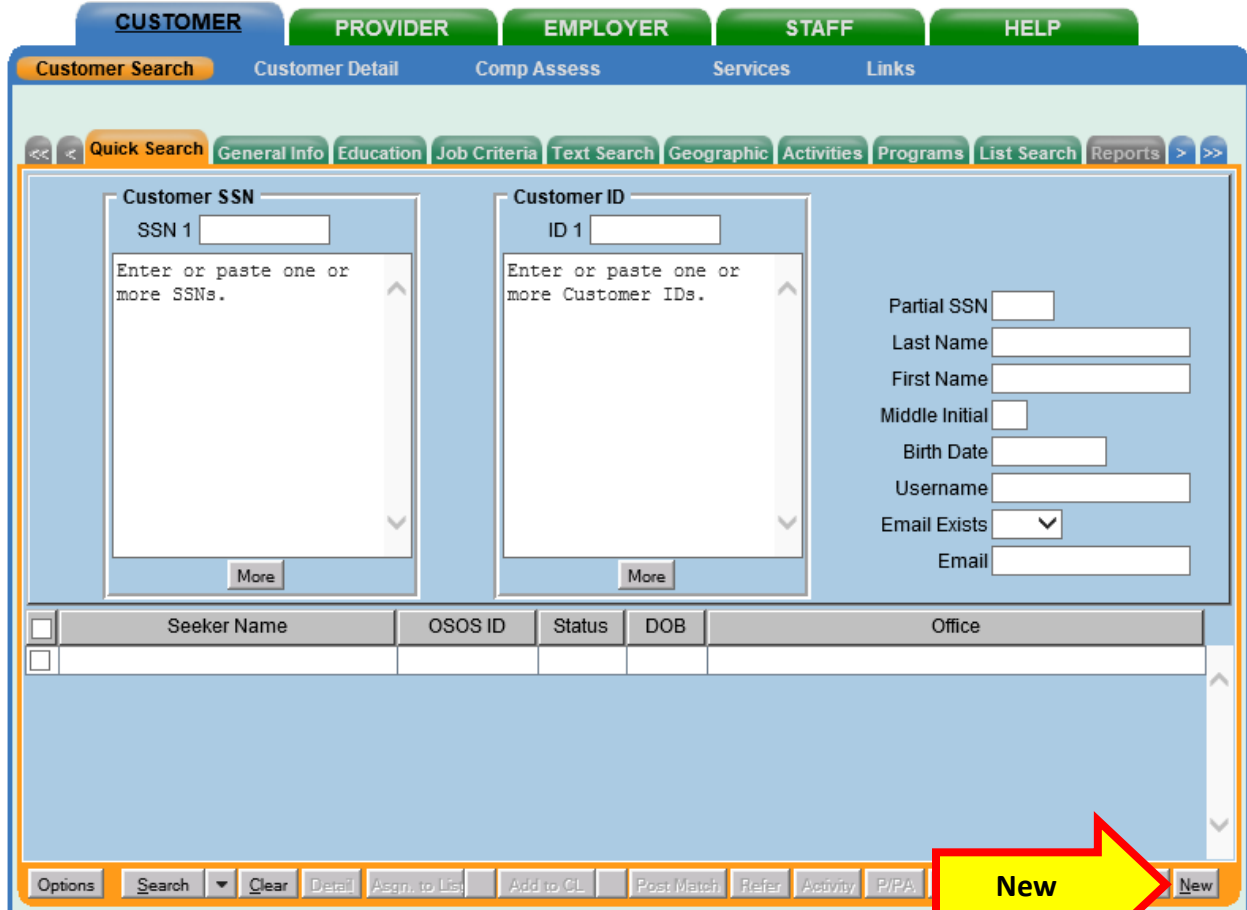


If there is a matching record, OSOS will display the customer's record. If there is no matching record, the system will display **No Matches Found** in the upper right-hand corner.



*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.



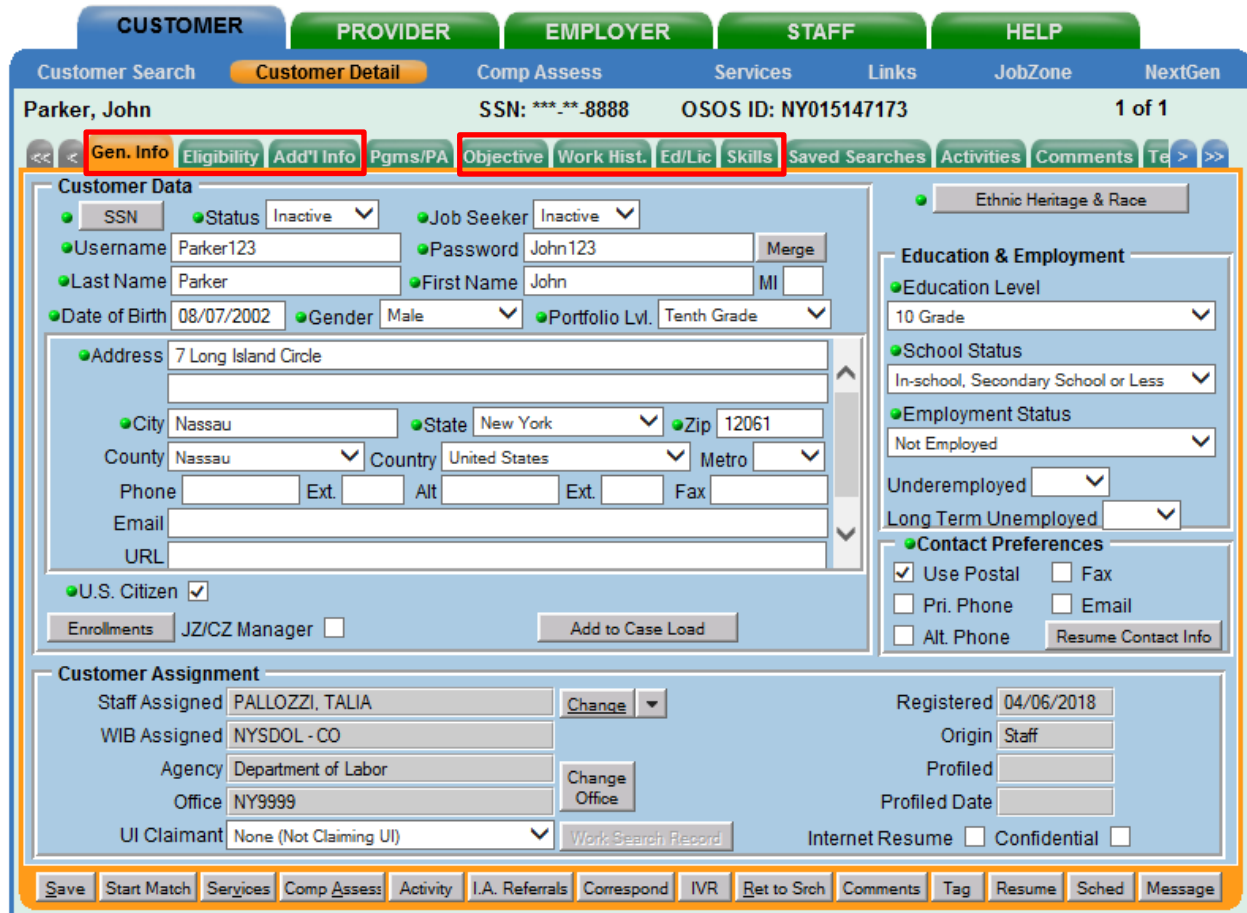
For detailed information on searching for a customer record, please see the [Performing a Customer Search OSOS Guide](#).

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



CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

Parker, John SSN: ***-**-8888 OSOS ID: NY015147173 1 of 1

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

Customer Data

● SSN ● Status Inactive ● Job Seeker Inactive ● Ethnic Heritage & Race

● Username Parker123 ● Password John123 Merge

● Last Name Parker ● First Name John MI

● Date of Birth 08/07/2002 ● Gender Male ● Portfolio Lvl. Tenth Grade

● Address 7 Long Island Circle

● City Nassau ● State New York ● Zip 12061

County Nassau Country United States Metro

Phone Ext. Alt. Ext. Fax

Email

URL

● U.S. Citizen

Enrollments JZ/CZ Manager Add to Case Load

Customer Assignment

Staff Assigned PALLOZZI, TALIA Change

WIB Assigned NYSDOL - CO

Agency Department of Labor Change Office

Office NY9999

UI Claimant None (Not Claiming UI) Work Search Record

Registered 04/06/2018

Origin Staff

Profiled

Profiled Date

Internet Resume Confidential

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



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.

- **Gen. Info tab**
 - **SSN:** Select the **SSN** button. If 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. This also affects performance measures. Entering a customer's SSN helps prevent duplicate records. If the customer does not provide their SSN, select **Not Disclosed**. The SSN field is located "behind" a button in order to keep it as confidential as possible.
 - **Ethnic Heritage & Race:** Select the **Ethnic Heritage & Race** button. If the customer provides Ethnic Heritage and/or Race information, select the most appropriate choice. If no information is provided, select **Not Disclosed**. This information is located "behind" the button in order to keep it as confidential as possible. NYSDOL is required to collect this information under the Workforce Innovation and Opportunity Act (WIOA) as a part of our federal reporting.
 - **Education Level** - Select the highest level of education completed.
 - **Portfolio Level** - Select the highest level of education completed.



*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.***



- **Eligibility tab**
 - **Income Info - Lower Living Standard** and **Income 70% LLSIL** are required fields. Select **Yes**, **No** or **Not Disclosed**. Where appropriate, select Yes only for Lower Living Standard OR Income 70% SSIL. Do not select Yes for both. The Income Eligibility Guidelines can be found on the [DOL Programs & Tools webpage](#), under Income Eligibility Guidelines.
 - **High Poverty Area**: This field is required for any customer 25 years old or younger. It is one of the fields that determines eligibility for the WIOA Youth Program. Information to determine High Poverty Area can be found [here](#).
 - **Disability Status**: If **Disabled** is selected, staff must select at least one **Disability Category**. Please note, **Not Disclosed** is an option if the customer does not want to identify their disability.
 - **Migrant Seasonal**: If **Yes** is selected, additional required fields will be displayed.
- **Add'l Info**
 - **Service Veteran**: For purposes of the OYCEA grant, staff will always select **No** in this field because customers under 18 years old would not be service veterans.
- **Pgms/PA**: This tab does not contain any required information. However, if your customer discloses that they are receiving public assistance, such as free or reduced school lunch, it should be recorded here. Select the type of public assistance using 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**
 - **Employment Objective**: This summarizes the customer's qualifications and desired position.
 - **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 customer's desired job title. Check the box next to the job title. Then click **Select**.
 - **Acceptable Job Locations**: Enter at least one **Acceptable Job Location**.
- **Work History**
 - 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**.

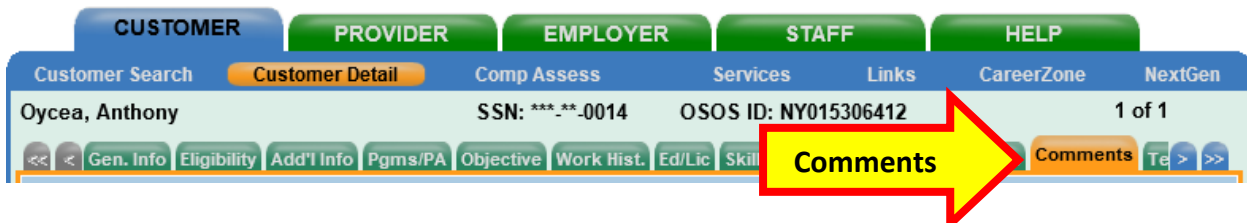
- **Ed/Lic**
 - There are three required sections within this tab; **Certificates/Licenses**, **Schools**, and **Professional Associations**. If the customer does not have information to enter in these sections, select **No Information Provided** under each section.
- **Skills**
 - **Additional Skills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

It is best practice to use the SENSE model when documenting case notes. Details on the SENSE model can be found in the [Writing an Effective Youth Program Case Note in OSOS Guide](#).

COMPREHENSIVE ASSESSMENT

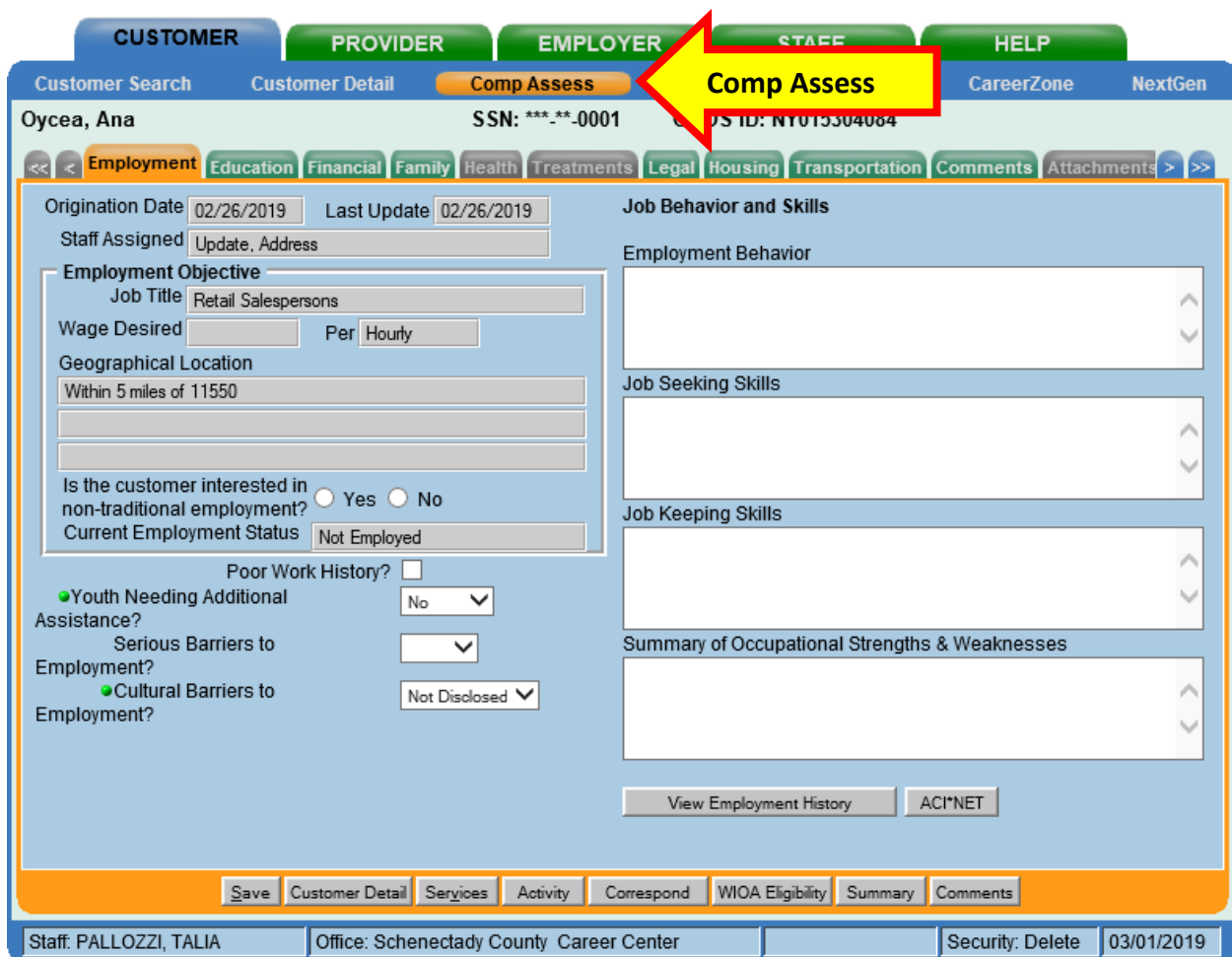
Information documented in the Comprehensive Assessment window is important for recording the customer's barriers and challenges. For detailed instructions on completing the Comprehensive Assessment, please see the [Comprehensive Assessment & Supplemental Data Guide](#).

Many of the fields in Comp Assess are used to determine eligibility in the WIOA Youth program. However, for the purposes of the OYCEA grant, providers should only enter information that is known. If the information is unknown, please select **Not Disclosed**.

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.



The screenshot displays the 'Comp Assess' window for customer 'Oycea, Ana'. The interface includes a navigation bar with tabs for 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. The 'Comp Assess' tab is highlighted with a yellow arrow. Below the navigation bar, there are tabs for 'Customer Search', 'Customer Detail', 'Comp Assess', 'CareerZone', and 'NextGen'. The main content area is divided into several sections:

- Employment Objective:** Includes fields for 'Job Title' (Retail Salespersons), 'Wage Desired', 'Per' (Hourly), and 'Geographical Location' (Within 5 miles of 11550).
- Job Behavior and Skills:** Contains sections for 'Employment Behavior', 'Job Seeking Skills', and 'Job Keeping Skills', each with a scrollable text area.
- Summary of Occupational Strengths & Weaknesses:** A scrollable text area for notes.
- Assessment Questions:** Includes 'Is the customer interested in non-traditional employment?' (radio buttons for Yes/No), 'Current Employment Status' (Not Employed), 'Poor Work History?' (checkbox), 'Youth Needing Additional Assistance?' (No), 'Serious Barriers to Employment?' (dropdown), and 'Cultural Barriers to Employment?' (Not Disclosed).

At the bottom of the window, there are buttons for 'Save', 'Customer Detail', 'Services', 'Activity', 'Correspond', 'WIOA Eligibility', 'Summary', and 'Comments'. The footer shows 'Staff: PALLOZZI, TALIA', 'Office: Schenectady County Career Center', 'Security: Delete', and '03/01/2019'.



Below are some noteworthy points for filling out the tabs located within the **Comprehensive Assessment** window.

Employment tab

- **Youth Needing Additional Assistance:** Local area determines what youth will fall into this category. For the purposes of this grant, select **No**.
- **Cultural Barriers to Employment:** This information is collected as a requirement under WIOA and is not related to this grant. 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. In most cases, such as a non-parenting youth, the customer is considered an **Other Family Member**. Or, select **Not Disclosed**.
- **Is Customer parenting youth?** - Female youth customers are considered parenting once pregnant. Alternatively, male youth customers are only considered parenting once their child is born.



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

Health tab and **Treatments** tab 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. Many youth will not own or rent their own home, so this information should be based on their care taker. For instance, if the youth lives in a home owned by their parent(s), select **Own**. Or, select **Not Disclosed**.

Transportation tab- License Information is populated from the **Ed/Lic** tab under the **Customer Detail** window. It is important to record applicable **Transportation Information** to identify if the customer can access services and obtain education or employment. Check any boxes that apply and record relevant comments related to work restrictions or job search restrictions in the **Customer Detail** window, **Comments** tab.

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

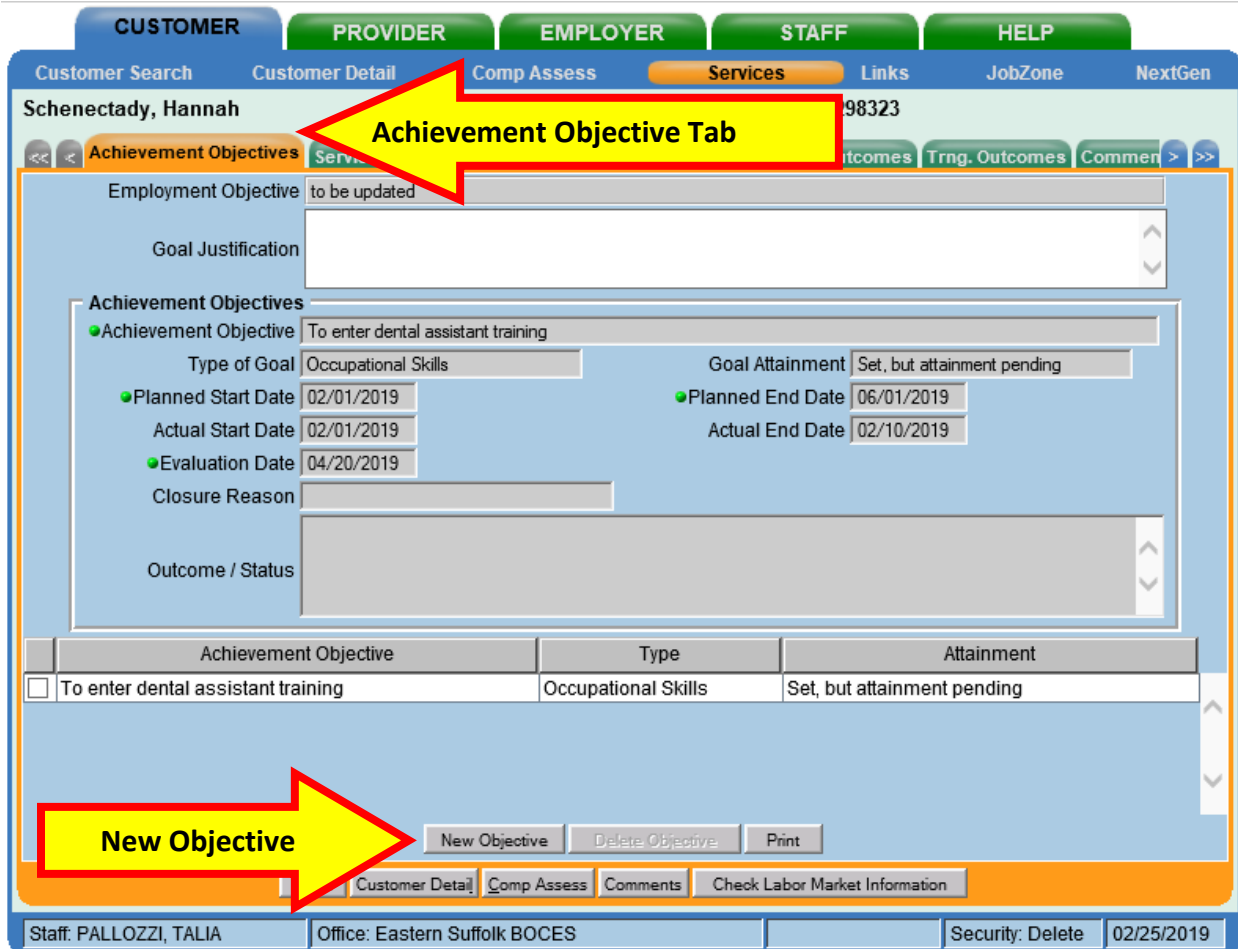
SERVICES

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

ENTERING AN ACHIEVEMENT OBJECTIVE

In order to enter a Youth Service for the customer, an **Achievement Objective** must first be saved in the customer record.

Select the **Customer** module, **Services** window, **Achievement Objectives** tab. Select the **New Objective** button at the bottom of the screen.



The screenshot shows the OSOS interface for a customer named Hannah Schenectady. The 'Services' window is open, and the 'Achievement Objectives' tab is selected. The interface includes a navigation bar with 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. Below this, there are tabs for 'Customer Search', 'Customer Detail', 'Comp Assess', 'Services', 'Links', 'JobZone', and 'NextGen'. The 'Services' tab is active, showing a list of achievement objectives. One objective is visible: 'To enter dental assistant training' with a type of 'Occupational Skills' and an attainment of 'Set, but attainment pending'. The 'New Objective' button is highlighted with a yellow arrow.

Achievement Objective	Type	Attainment
<input type="checkbox"/> To enter dental assistant training	Occupational Skills	Set, but attainment pending

Enter the **Achievement Objective**, **Planned Start Date**, **Actual Start Date**, **Goal Attainment**, **Planned End Date** and **Evaluation Date**. Click **Save**.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

Schenectady, Hannah SSN: OSOS ID: NY015298323

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

Employment Objective to be updated

Goal Justification

Achievement Objectives

Achievement Objective Develop a career goal

Type of Goal

Goal Attainment

Planned Start Date 02/25/2019

Planned End Date 05/25/2019

Actual Start Date

Actual End Date

Evaluation Date 15/25/2019 x

Closure Reason

Outcome / Status

Achievement Objective	Type	Attainment
<input type="checkbox"/> To enter dental assistant training	Occupational Skills	Set, but attainment pending
<input checked="" type="checkbox"/> <u>Develop a career goal</u>		

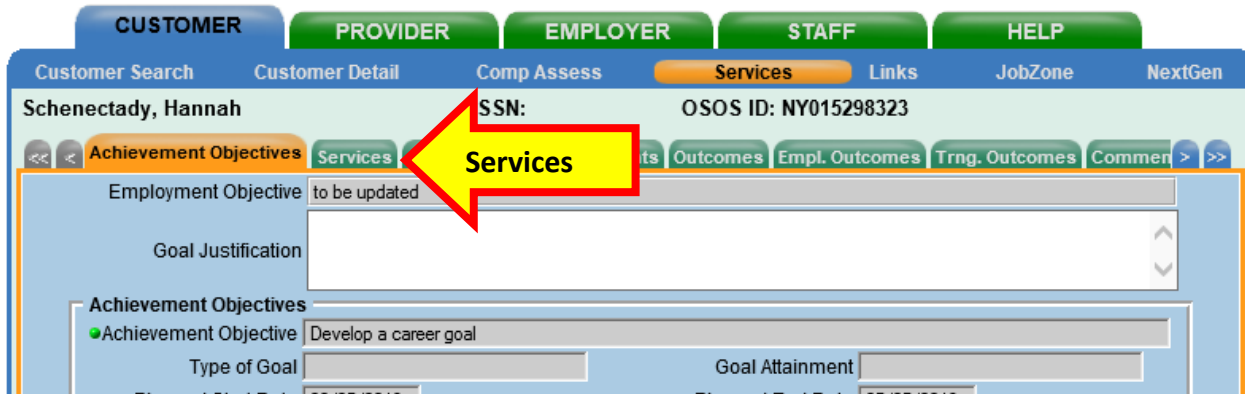
New Objective Delete Objective Print

Save Save Customer Detail Comp Assess Comments Check Labor Market Information

Staff: PALLOZZI, TALIA Office: Eastern Suffolk BOCES Unsaved Changes Security: Delete 02/25/2019

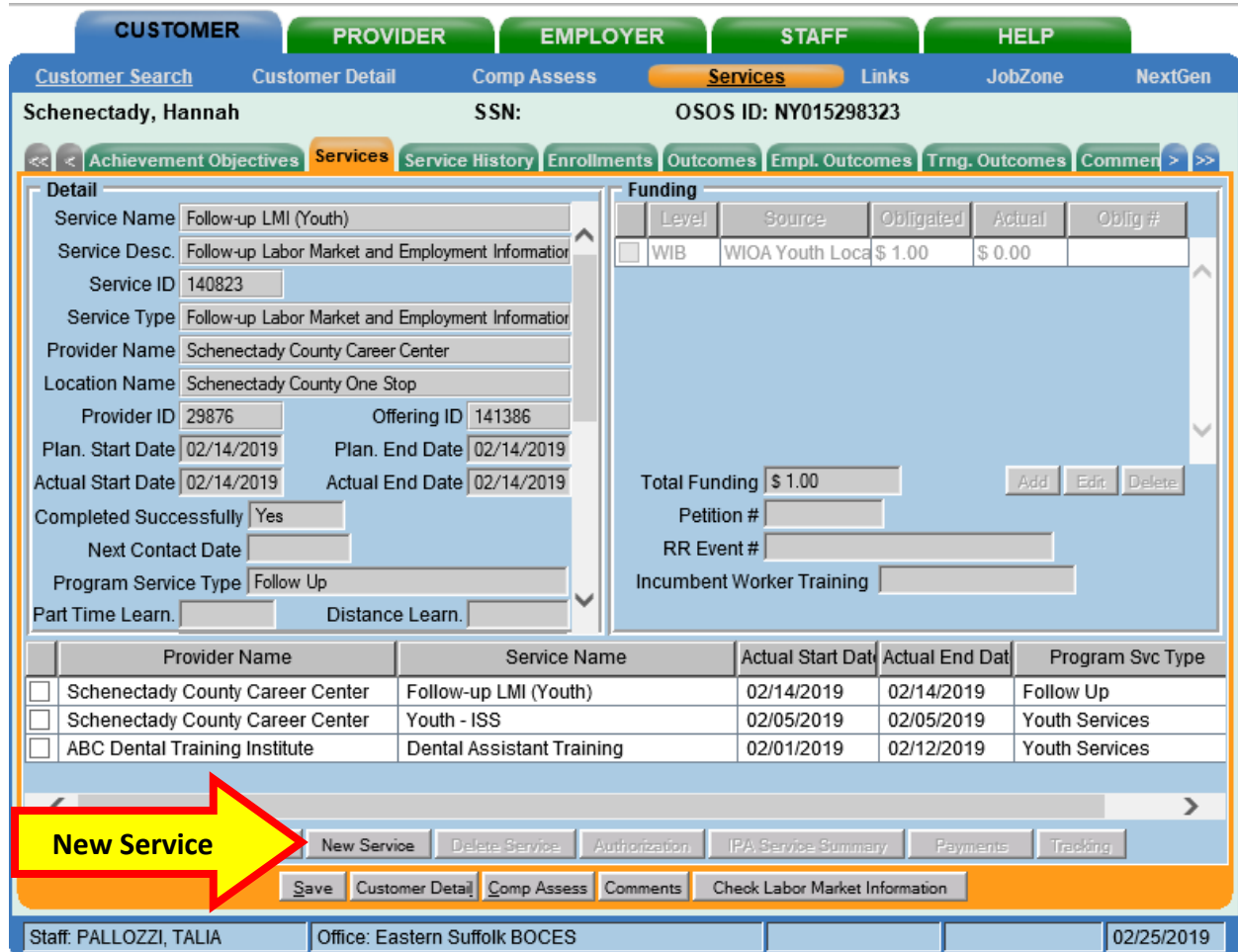
ENTERING THE SERVICE

Once there is an appropriate **Achievement Objective** saved in the customer record, you can enter a Service. Select the **Services** tab.



The screenshot shows the OSOS interface for customer 'Schenectady, Hannah'. The 'Services' tab is highlighted in the navigation menu, indicated by a red arrow. The main content area shows an 'Employment Objective' section with a goal to 'Develop a career goal'.

Select the **New Service** button.

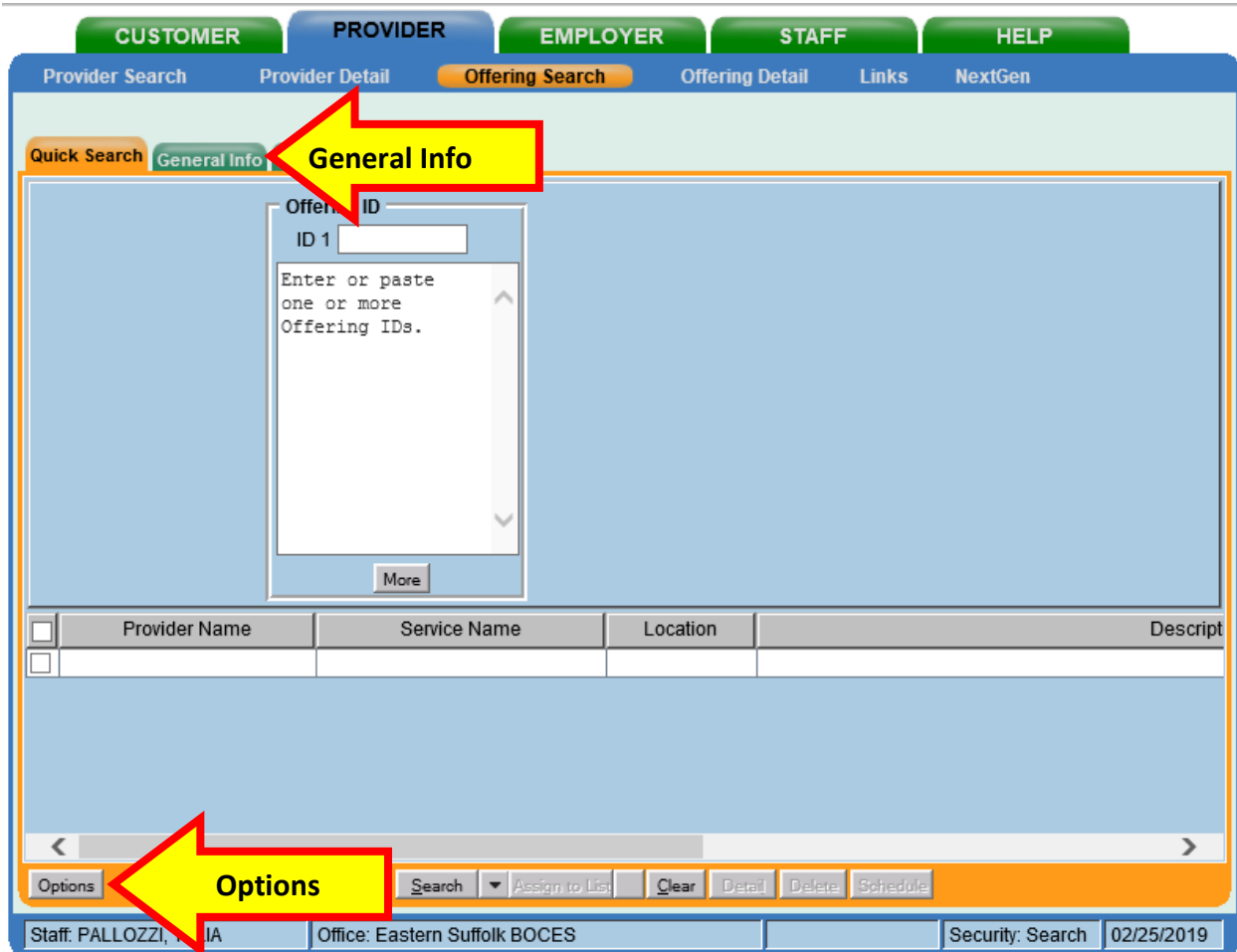


The screenshot shows the OSOS interface for customer 'Schenectady, Hannah' with the 'Services' tab selected. The 'Detail' section shows service information for 'Follow-up LMI (Youth)'. The 'Funding' section shows a table with columns for Level, Source, Obligated, Actual, and Oblig #. The 'Total Funding' is \$1.00. The bottom navigation bar has a red arrow pointing to the 'New Service' button.

Level	Source	Obligated	Actual	Oblig #	
<input type="checkbox"/>	WIB	WIOA Youth Loca	\$ 1.00	\$ 0.00	

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/> Schenectady County Career Center	Follow-up LMI (Youth)	02/14/2019	02/14/2019	Follow Up
<input type="checkbox"/> Schenectady County Career Center	Youth - ISS	02/05/2019	02/05/2019	Youth Services
<input type="checkbox"/> ABC Dental Training Institute	Dental Assistant Training	02/01/2019	02/12/2019	Youth Services

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



Before searching for the Service, click the **Options** button to customize your search results. This opens the Offering Search Results Columns Webpage Dialogue box. Select the following display results, using the order provided below:

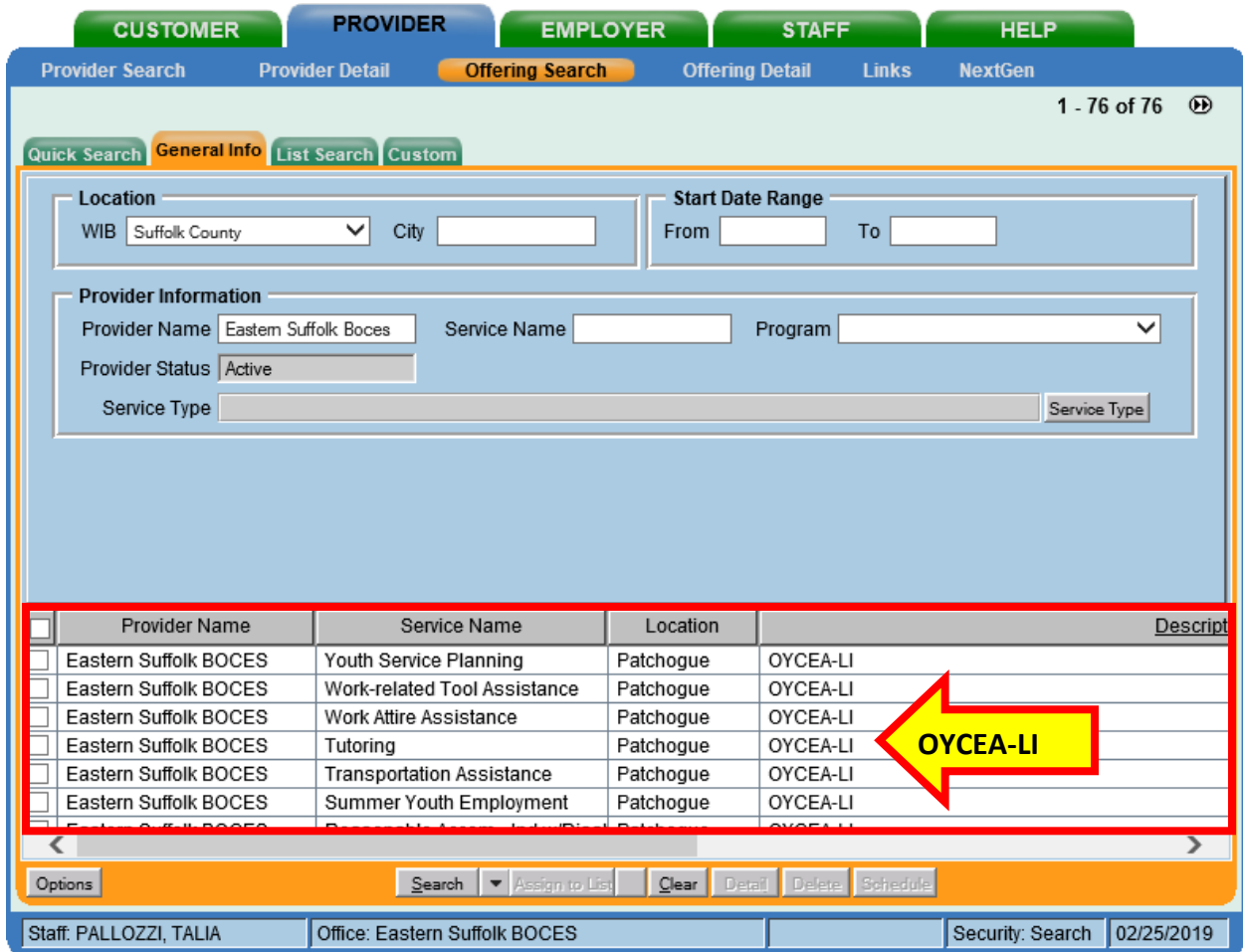
- **Provider Name** (1)
- **Service Name** (2)
- **Service Description** (3)
- **Location Name** (4)

Select the **Set as My Defaults** check box. Then, click **Save**.

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

Verify the correct **WIB** is selected, enter your organization's name into the **Provider Name** field and click the **Search** button. The search results will be presented at the bottom.

Select the **Description** column to sort the results alphabetically by Description. Then scroll down to view the **OYCEA-LI** offerings.



<input type="checkbox"/>	Provider Name	Service Name	Location	Description
<input type="checkbox"/>	Eastern Suffolk BOCES	Youth Service Planning	Patchogue	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Work-related Tool Assistance	Patchogue	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Work Attire Assistance	Patchogue	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Tutoring	Patchogue	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Transportation Assistance	Patchogue	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Summer Youth Employment	Patchogue	OYCEA-LI



*All of the Services for OYCEA participants will be identified by listing **OYCEA-LI** in the Description. Do not select any Service that does not have this description.*

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

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

1 - 76 of 76

Quick Search General Info List Search Custom

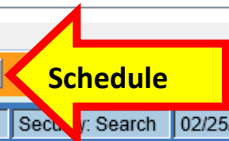
Location: WIB Suffolk County City: Start Date Range: From To

Provider Information: Provider Name: Eastern Suffolk Boces Service Name: Program: Provider Status: Active Service Type: Service Type

<input type="checkbox"/>	Provider Name	Service Name	Location	Descript
<input type="checkbox"/>	Eastern Suffolk BOCES	Out of School Work Experience	Eastern Suffolk	Out of School Work Experience
<input checked="" type="checkbox"/>	Eastern Suffolk BOCES	Youth Service Planning	Patchogue	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Work-related Tool Assistance	Patchogue	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Work Attire Assistance	Patchogue	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Tutoring	Patchogue	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Transportation Assistance	Patchogue	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Summer Youth Employment	Patchogue	OYCEA-LI

Options Search Assign to List Clear Detail Delete Schedule

Staff: PALLOZZI, TALIA Office: Eastern Suffolk BOCES Security: Search 02/25/2019





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

Enter in the following fields: **Plan Start Date**, **Plan End Date**, and **Actual Start Date**.

Many services may be provided in one day. If this is the case, enter the same date for the **Actual Start Date** and **Actual End Date** of the service. From the drop downs, select options for **Completed Successfully** (yes/no), **Program Service Type** (will be Youth Services except when entering a Follow-up Service. This will be addressed later in the Guide), **Program** (OYCEA Nassau/Suffolk), and the appropriate **Achievement Objective**.

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. From the drop downs, select **Program Service Type** (will be Youth Services except when entering a Follow-up Service. This will be addressed later in the Guide), **Program** (OYCEA Nassau/Suffolk), and the appropriate **Achievement Objective**.

Click the **Save** button.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

Schenectady, Hannah SSN: OSOS ID: NY015298323

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

Detail

Plan. Start Date 02/25/2019 Plan. End Date 02/25/2019
Actual Start Date 02/25/2019 Actual End Date 02/25/2019
Completed Successfully Yes
Next Contact Date
Program Service Type Youth Services
Part Time Learn Distance Learn
Program OYCEA Nassau/Suffolk
Minimum Hours Number of Weeks
O*Net O*Net
NAICS NAICS
Min Prog Agreed
Achv. Objective Develop a career goal
Staff Assigned PALLOZZI, TALIA

Funding

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

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

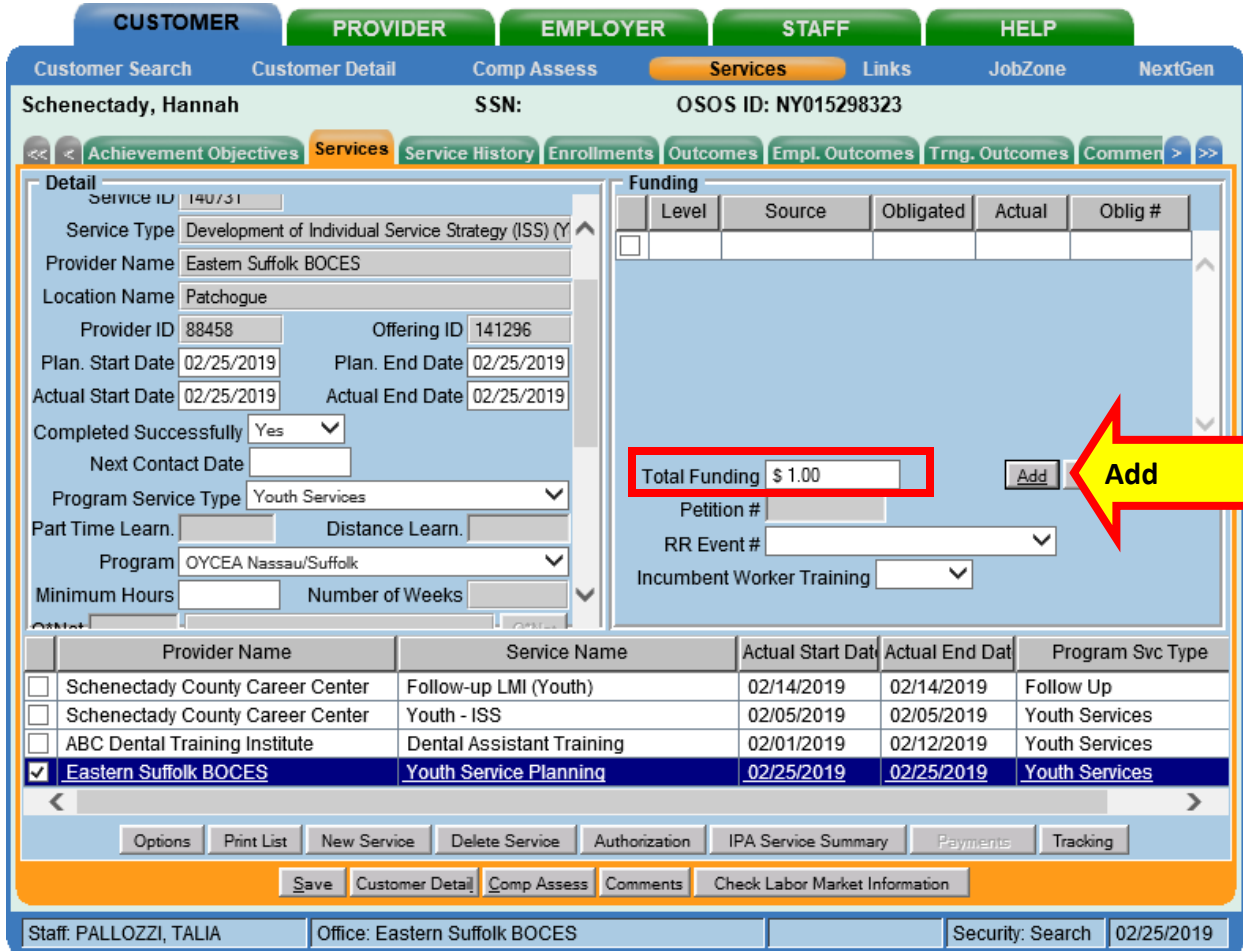
	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/>	Eastern Suffolk BOCES	Youth Service Planning	02/25/2019	02/25/2019	Youth Services
<input type="checkbox"/>	Schenectady County Career Center	Youth - ISS	02/05/2019	02/05/2019	Youth Services
<input type="checkbox"/>	ABC Dental Training Institute	Dental Assistant Training	02/01/2019	02/12/2019	Youth Services

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

Save Save Comp Assess Comments Check Labor Market Information

Staff: PALLOZZI, TALIA Office: Eastern Suffolk BOCES Unsaved Changes Security: Delete 02/25/2019

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



The screenshot shows the OSOS interface with the 'Services' tab selected. The 'Detail' section on the left contains the following information:

- Service ID: 140731
- Service Type: Development of Individual Service Strategy (ISS) (Y)
- Provider Name: Eastern Suffolk BOCES
- Location Name: Patchogue
- Provider ID: 88458, Offering ID: 141296
- Plan. Start Date: 02/25/2019, Plan. End Date: 02/25/2019
- Actual Start Date: 02/25/2019, Actual End Date: 02/25/2019
- Completed Successfully: Yes
- Next Contact Date: [empty]
- Program Service Type: Youth Services
- Part Time Learn.: [empty], Distance Learn.: [empty]
- Program: OYCEA Nassau/Suffolk
- Minimum Hours: [empty], Number of Weeks: [empty]

The 'Funding' section on the right contains a table with the following columns: Level, Source, Obligated, Actual, and Oblig #. Below the table, the 'Total Funding' field is set to '\$ 1.00' and is highlighted with a red box. A yellow arrow points to the 'Add' button next to this field. Other fields include 'Petition #', 'RR Event #', and 'Incumbent Worker Training'.

At the bottom, there is a table listing services with the following columns: Provider Name, Service Name, Actual Start Date, Actual End Date, and Program Svc Type.

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/> Schenectady County Career Center	Follow-up LMI (Youth)	02/14/2019	02/14/2019	Follow Up
<input type="checkbox"/> Schenectady County Career Center	Youth - ISS	02/05/2019	02/05/2019	Youth Services
<input type="checkbox"/> ABC Dental Training Institute	Dental Assistant Training	02/01/2019	02/12/2019	Youth Services
<input checked="" type="checkbox"/> Eastern Suffolk BOCES	Youth Service Planning	02/25/2019	02/25/2019	Youth Services

Navigation buttons at the bottom include: Options, Print List, New Service, Delete Service, Authorization, IPA Service Summary, Payments, Tracking, Save, Customer Detail, Comp Assess, Comments, and Check Labor Market Information.

Staff: PALLOZZI, TALIA | Office: Eastern Suffolk BOCES | Security: Search | 02/25/2019

The **Funding Webpage Dialogue** box will open. Select **Youth Statewide 15%** funding for **2018**. Enter 1 in the **Obligated Amount** field. This will automatically populate the **Obligated Percentage** field as 100. Click **OK**.

Funding -- Webpage Dialog

Funding

	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	WIB	WIOA Adult Local	2018	\$ 100000.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2017	\$ 999999.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2018	\$ 100000.00	
<input type="checkbox"/>	WIB	WIOA Youth Local	2017	\$ 1000000.00	
<input type="checkbox"/>	WIB	WIOA Youth Local	2018	\$ 100000.00	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2017	\$ 1000000.00	
<input checked="" type="checkbox"/>	State	Youth Statewide 15%	2018	\$ 99993.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2017	\$ 1000000.00	
<input type="checkbox"/>	State	Dislocated Worker Statewide 15%	2018	\$ 99999.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2017	\$ 1000000.00	
<input type="checkbox"/>	State	Adult Statewide 15%	2018	\$ 99998.00	
<input type="checkbox"/>	State	WIRED	2018	\$ 15000.00	WR12
<input type="checkbox"/>	Local Office	NYESS - ACCES-VR Intensive	2017	\$ 10000.00	
<input type="checkbox"/>	Local Office	NYESS - OPWDD - SEMP Extended	2017	\$ 10000.00	
<input type="checkbox"/>	State	H-1B Nursing	2018	\$ 5000.00	AA123451655A26
<input type="checkbox"/>	Local Office	NYESS - OPWDD - SEMP Intensive SD/SHir	2019	\$ 10000.00	
<input type="checkbox"/>	Local Office	NYESS - OPWDD - SEMP Intensive SD/Agn	2019	\$ 10000.00	
<input type="checkbox"/>	Local Office	NYESS - OPWDD - SEMP Extended SD/Agn	2019	\$ 10000.00	
<input type="checkbox"/>	Local Office	NYESS - OPWDD - SEMP Private Pay	2019	\$ 10000.00	
<input type="checkbox"/>	Local Office	NYESS - OPWDD - SEMP Other	2019	\$ 10000.00	

Obligated Amount

OR

Obligated Percentage

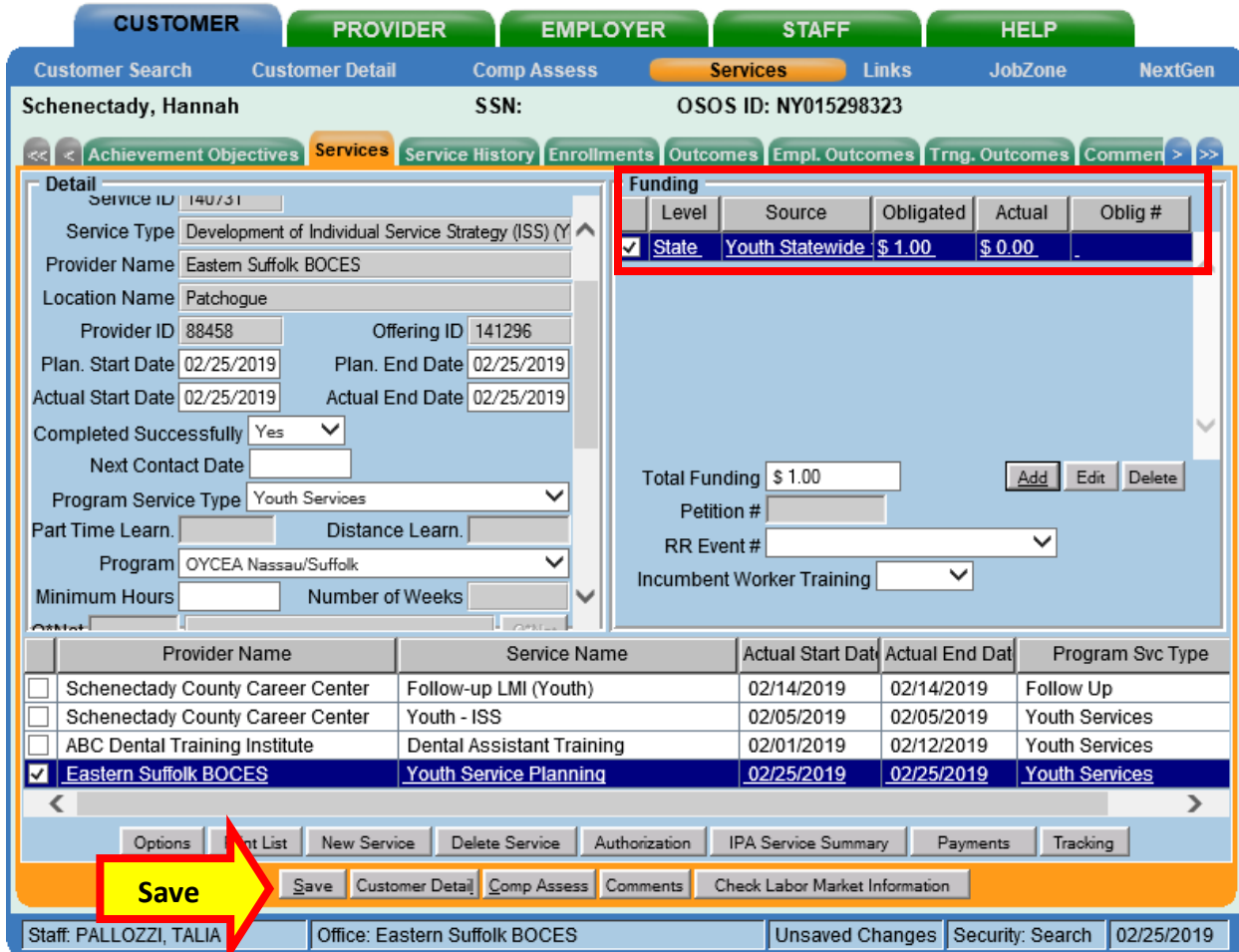
WIB

Office

Region

←

The appropriate funding has now populated the **Funding** section. Click **Save** at the bottom of the screen.



The screenshot shows the OSOS interface for a customer named Schenectady, Hannah. The 'Services' tab is active, displaying a list of services and a 'Funding' section. A red box highlights the 'Funding' table, which contains one entry: State, Youth Statewide, \$ 1.00, \$ 0.00. A yellow arrow points to the 'Save' button at the bottom of the screen.

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	State	Youth Statewide	\$ 1.00	\$ 0.00

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/> Schenectady County Career Center	Follow-up LMI (Youth)	02/14/2019	02/14/2019	Follow Up
<input type="checkbox"/> Schenectady County Career Center	Youth - ISS	02/05/2019	02/05/2019	Youth Services
<input type="checkbox"/> ABC Dental Training Institute	Dental Assistant Training	02/01/2019	02/12/2019	Youth Services
<input checked="" type="checkbox"/> Eastern Suffolk BOCES	Youth Service Planning	02/25/2019	02/25/2019	Youth Services

SAVING THE FIRST ENROLLING SERVICE

When staff enter and save the first enrolling service, the **Enrollment Verification Webpage Dialog Box** will open. Staff must review all of the information for accuracy, making any updates or edits as necessary. The system takes a "snap shot" of this information for reporting purposes. Therefore, this review ensures that the customer's information is correct at the time of enrollment.



CLOSING A SERVICE

It is important that Services are closed when appropriate. Funded services other than Follow-Up Services that remain open will prevent a customer from exiting their enrollment.

To close the Service, navigate to the **Customer** module, **Services** window, **Services** tab. Select the Service that has ended and must be closed.

CUSTOMER | PROVIDER | EMPLOYER | STAFF | HELP

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

Schenectady, Hannah | SSN: | OSOS ID: NY015298323

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

Detail

Plan. Start Date: 01/28/2019 | Plan. End Date: 02/25/2019
 Actual Start Date: 01/28/2019 | Actual End Date:
 Completed Successfully:
 Next Contact Date:
 Program Service Type: Youth Services
 Part Time Learn.: | Distance Learn.:
 Program: OYCEA Nassau/Suffolk
 Minimum Hours: | Number of Weeks:
 O*Net: | O*Net:
 NAICS: | NAICS:
 Min. Prog. Agreed:
 Achv. Objective: Develop a career goal
 Staff Assigned: | Change

Funding

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	State	Youth Statewide	\$ 1.00	\$ 0.00

Total Funding: \$ 1.00 | 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"/>	Eastern Suffolk BOCES	Youth Service Planning	02/25/2019	02/25/2019	Youth Services
<input type="checkbox"/>	Schenectady County Career Center	Youth - ISS	02/05/2019	02/05/2019	Youth Services
<input type="checkbox"/>	ABC Dental Training Institute	Dental Assistant Training	02/01/2019	02/12/2019	Youth Services
<input checked="" type="checkbox"/>	Eastern Suffolk BOCES	Financial Literacy Education	01/28/2019	.	Youth Services

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

Save | Customer Detail | Comp Assess | Comments | Check Labor Market Information

Staff: PALLOZZI, TALIA | Office: Eastern Suffolk BOCES | Security: Delete | 02/25/2019

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

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

Schenectady, Hannah SSN: OSOS ID: NY015298323

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

Detail

Plan. Start Date 01/28/2019 Plan. End Date 02/25/2019

Actual Start Date 01/28/2019 **Actual End Date 02/25/2019**

Completed Successfully Yes

Next Contact Date

Program Service Type Youth Services

Part Time Learn. Distance Learn.

Program OYCEA Nassau/Suffolk

Minimum Hours Number of Weeks

O*Net O*Net

NAICS NAICS

Min. Prog. Agreed

Achv. Objective Develop a career goal

Staff Assigned Change

Funding

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	State Youth Statewide	\$ 1.00	\$ 0.00	

Total Funding \$ 1.00 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"/>	Eastern Suffolk BOCES	Youth Service Planning	02/25/2019	02/25/2019	Youth Services
<input type="checkbox"/>	Schenectady County Career Center	Youth - ISS	02/05/2019	02/05/2019	Youth Services
<input type="checkbox"/>	ABC Dental Training Institute	Dental Assistant Training	02/01/2019	02/12/2019	Youth Services
<input checked="" type="checkbox"/>	Eastern Suffolk BOCES	Financial Literacy Education	01/28/2019	02/25/2019	Youth Services

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

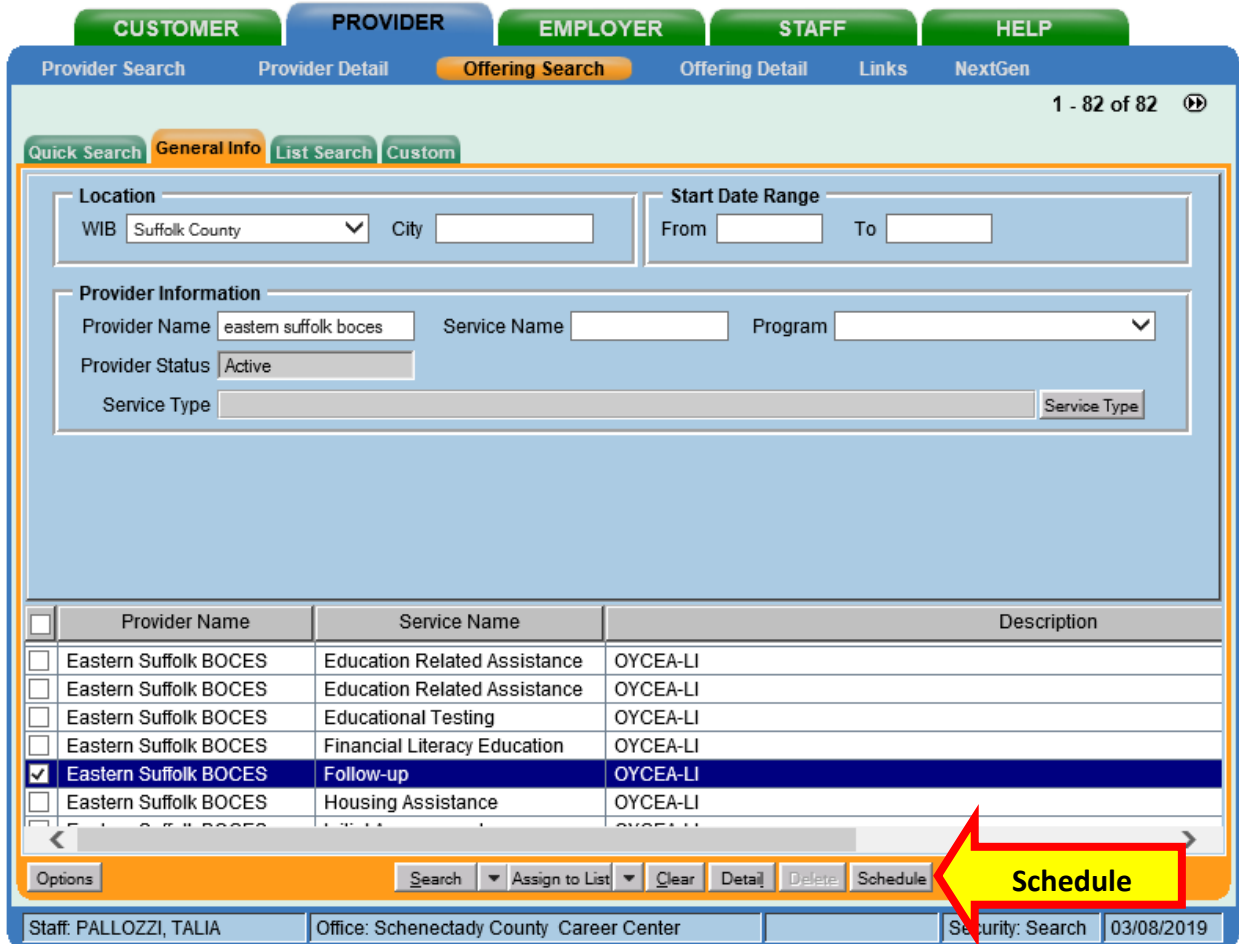
Save Save Comp Assess Comments Check Labor Market Information

Staff: PALLOZZI, TALIA Office: Eastern Suffolk BOCES Unsaved Changes Security: Delete 02/25/2019

FOLLOW UP SERVICES

The process for entering follow up services is similar to the directions above. Navigate to the **Provider** module, **Offering Search** window, **General Info** tab.

Verify the correct **WIB** is selected, enter your organization's name into the **Provider Name** field and click the **Search** button. The search results will be presented at the bottom.



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

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Quick Search **General Info** List Search Custom

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

Provider Information
 Provider Name: eastern suffolk boces Service Name: Program:
 Provider Status: Active
 Service Type: Service Type

<input type="checkbox"/>	Provider Name	Service Name	Description
<input type="checkbox"/>	Eastern Suffolk BOCES	Education Related Assistance	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Education Related Assistance	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Educational Testing	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Financial Literacy Education	OYCEA-LI
<input checked="" type="checkbox"/>	Eastern Suffolk BOCES	Follow-up	OYCEA-LI
<input type="checkbox"/>	Eastern Suffolk BOCES	Housing Assistance	OYCEA-LI

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

Staff: PALLOZZI, TALIA Office: Schenectady County Career Center Security: Search 03/08/2019

Select the **Description** column to sort the results alphabetically by Description. Then scroll down to view the **OYCEA-LI** offerings (as indicated in the Description column). Select **Follow up** (as indicated in the Service Name column).

Click the **Schedule** button.

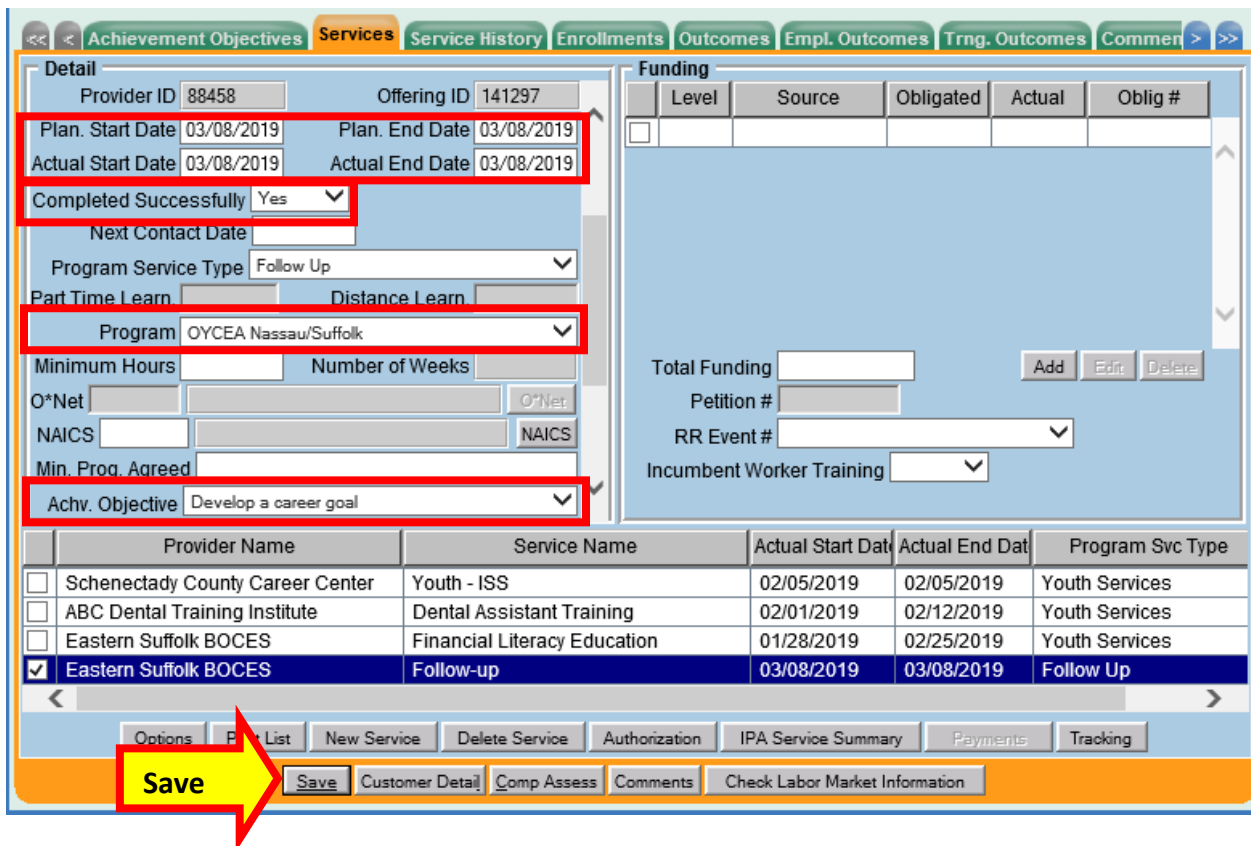
This brings you to the **Services** window, **Services** tab.

Enter **Plan. Start Date**, **Plan. End Date**, **Actual Start Date**, and **Actual End Date**. Then, select the **Program Service Type**. Last, select the appropriate **Achievement Objective** associated with this service.



*When entering follow up Services in OSOS, the **Program Service Type** is always **Follow up**. Also, is important to note that the **Actual Start Date** for the follow up service must be at least one day past the **Actual End Date** of the last enrolling service.*

When this required information is entered, click the **Save** button at the bottom of the screen.



The screenshot shows the OSOS Services window with the following details:

- Detail Section:**
 - Provider ID: 88458, Offering ID: 141297
 - Plan. Start Date: 03/08/2019, Plan. End Date: 03/08/2019
 - Actual Start Date: 03/08/2019, Actual End Date: 03/08/2019
 - Completed Successfully: Yes
 - Next Contact Date: (empty)
 - Program Service Type: Follow Up
 - Part Time Learn: (empty), Distance Learn: (empty)
 - Program: OYCEA Nassau/Suffolk
 - Minimum Hours: (empty), Number of Weeks: (empty)
 - O*Net: (empty), NAICS: (empty)
 - Min. Prog. Agreed: (empty)
 - Achv. Objective: Develop a career goal
- Funding Section:**
 - Table with columns: Level, Source, Obligated, Actual, Oblig #
 - Total Funding: (empty), Add, Edit, Delete buttons
 - Petition #: (empty)
 - RR Event #: (empty)
 - Incumbent Worker Training: (empty)
- Table:**

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Schenectady County Career Center	Youth - ISS	02/05/2019	02/05/2019	Youth Services
<input type="checkbox"/>	ABC Dental Training Institute	Dental Assistant Training	02/01/2019	02/12/2019	Youth Services
<input type="checkbox"/>	Eastern Suffolk BOCES	Financial Literacy Education	01/28/2019	02/25/2019	Youth Services
<input checked="" type="checkbox"/>	Eastern Suffolk BOCES	Follow-up	03/08/2019	03/08/2019	Follow Up
- Buttons:** Options, List, New Service, Delete Service, Authorization, IPA Service Summary, Payments, Tracking, Save, Customer Detail, Comp Assess, Comments, Check Labor Market Information

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

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

Detail

Provider ID: 88458 Offering ID: 141297

Plan. Start Date: 03/08/2019 Plan. End Date: 03/08/2019

Actual Start Date: 03/08/2019 Actual End Date: 03/08/2019

Completed Successfully: Yes

Next Contact Date:

Program Service Type: Follow Up

Part Time Learn.: Distance Learn.:

Program: OYCEA Nassau/Suffolk

Minimum Hours: Number of Weeks:

O*Net: O*Net:

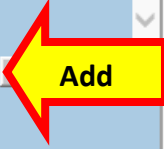
NAICS: NAICS:

Min. Prog. Agreed:

Achv. Objective: Develop a career goal

Funding

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

Total Funding: \$ 1.00 × Add 

Petition #:

RR Event #:

Incumbent Worker Training:

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Schenectady County Career Center	Youth - ISS	02/05/2019	02/05/2019	Youth Services
<input type="checkbox"/>	ABC Dental Training Institute	Dental Assistant Training	02/01/2019	02/12/2019	Youth Services
<input type="checkbox"/>	Eastern Suffolk BOCES	Financial Literacy Education	01/28/2019	02/25/2019	Youth Services
<input checked="" type="checkbox"/>	Eastern Suffolk BOCES	Follow-up	03/08/2019	03/08/2019	Follow Up

The **Funding Webpage Dialogue** box will open. Select **Youth Statewide 15%** funding for **2018**. Enter 1 in the **Obligated Amount** field. This will automatically populate the **Obligated Percentage** field as 100. Click **OK**.

Funding -- Webpage Dialog ×

Funding

	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	WIB	WIOA Adult Local	2017	\$ 99994.00	
<input type="checkbox"/>	WIB	WIOA Adult Local	2018	\$ 9999.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2017	\$ 99998.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2018	\$ 9996.00	
<input type="checkbox"/>	WIB	WIOA Youth Local	2017	\$ 99996.00	
<input type="checkbox"/>	WIB	WIOA Youth Local	2018	\$ 9970.00	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2017	\$ 100000.00	
<input checked="" type="checkbox"/>	State	Youth Statewide 15%	2018	\$ 99923.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	State	Dislocated Worker Statewide 15%	2018	\$ 99999.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	State	Adult Statewide 15%	2018	\$ 99998.00	
<input type="checkbox"/>	State	WIRED	2018	\$ 15000.00	WR12
<input type="checkbox"/>	State	H-1B Nursing	2018	\$ 5000.00	AA123451655A26
<input type="checkbox"/>	State	Workforce Learning Link	2017	\$ 99996.00	1013
<input type="checkbox"/>	State	Industry Standard	2018	\$ 5000.00	NY222215

Obligated Amount ×

OR

Obligated Percentage

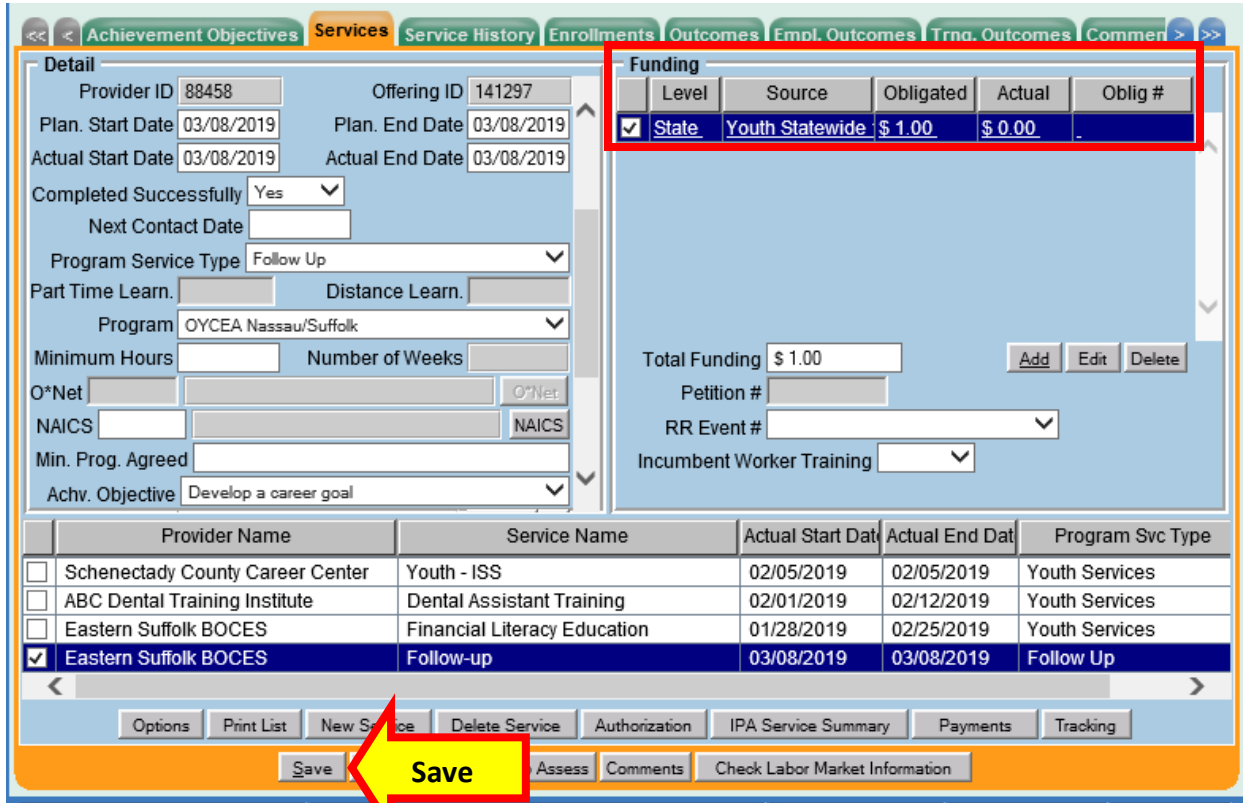
WIB

Office

Region

← OK

The appropriate funding has now populated the **Funding** section. Click **Save** at the bottom of the screen.



The screenshot shows the OSOS Services window with the following details:

- Detail Section:**
 - Provider ID: 88458, Offering ID: 141297
 - Plan. Start Date: 03/08/2019, Plan. End Date: 03/08/2019
 - Actual Start Date: 03/08/2019, Actual End Date: 03/08/2019
 - Completed Successfully: Yes
 - Next Contact Date: [Empty]
 - Program Service Type: Follow Up
 - Part Time Learn. [Empty], Distance Learn. [Empty]
 - Program: OYCEA Nassau/Suffolk
 - Minimum Hours [Empty], Number of Weeks [Empty]
 - O*Net [Empty], NAICS [Empty]
 - Min. Prog. Agreed [Empty]
 - Achv. Objective: Develop a career goal
- Funding Section:**

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	State	Youth Statewide	\$ 1.00	\$ 0.00

Total Funding \$ 1.00 [Add] [Edit] [Delete]

Petition # [Empty]

RR Event # [Empty]

Incumbent Worker Training [Empty]
- Service List Table:**

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Schenectady County Career Center	Youth - ISS	02/05/2019	02/05/2019	Youth Services
<input type="checkbox"/>	ABC Dental Training Institute	Dental Assistant Training	02/01/2019	02/12/2019	Youth Services
<input type="checkbox"/>	Eastern Suffolk BOCES	Financial Literacy Education	01/28/2019	02/25/2019	Youth Services
<input checked="" type="checkbox"/>	Eastern Suffolk BOCES	Follow-up	03/08/2019	03/08/2019	Follow Up
- Buttons:** Options, Print List, New Service, Delete Service, Authorization, IPA Service Summary, Payments, Tracking, **Save** (highlighted with a red arrow), Assess, Comments, Check Labor Market Information



*Enter a case note in the **Customer** module, **Customer Detail** window, **Comments** tab to provide details regarding the Follow up service.*



RESOURCES AND ASSISTANCE

[OYCEA RFP](#)

[NYSDOL Programs and Tools Website](#)

[Performing a Customer Search OSOS Guide](#)

[Creating a Basic Customer Record OSOS Guide](#)

[Comprehensive Assessment & Supplemental Data Guide](#)

[High Poverty Area Guidelines](#)

[Military Service Questionnaire](#)

[Writing an Effective Youth Program Case Note in OSOS Guide](#)

Additional program information, OSOS guides and other resources can be found at:

<http://labor.ny.gov/workforcenypartners/osos.shtm>

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: help.osos@labor.ny.gov