

# OYCEA-City of Syracuse 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.

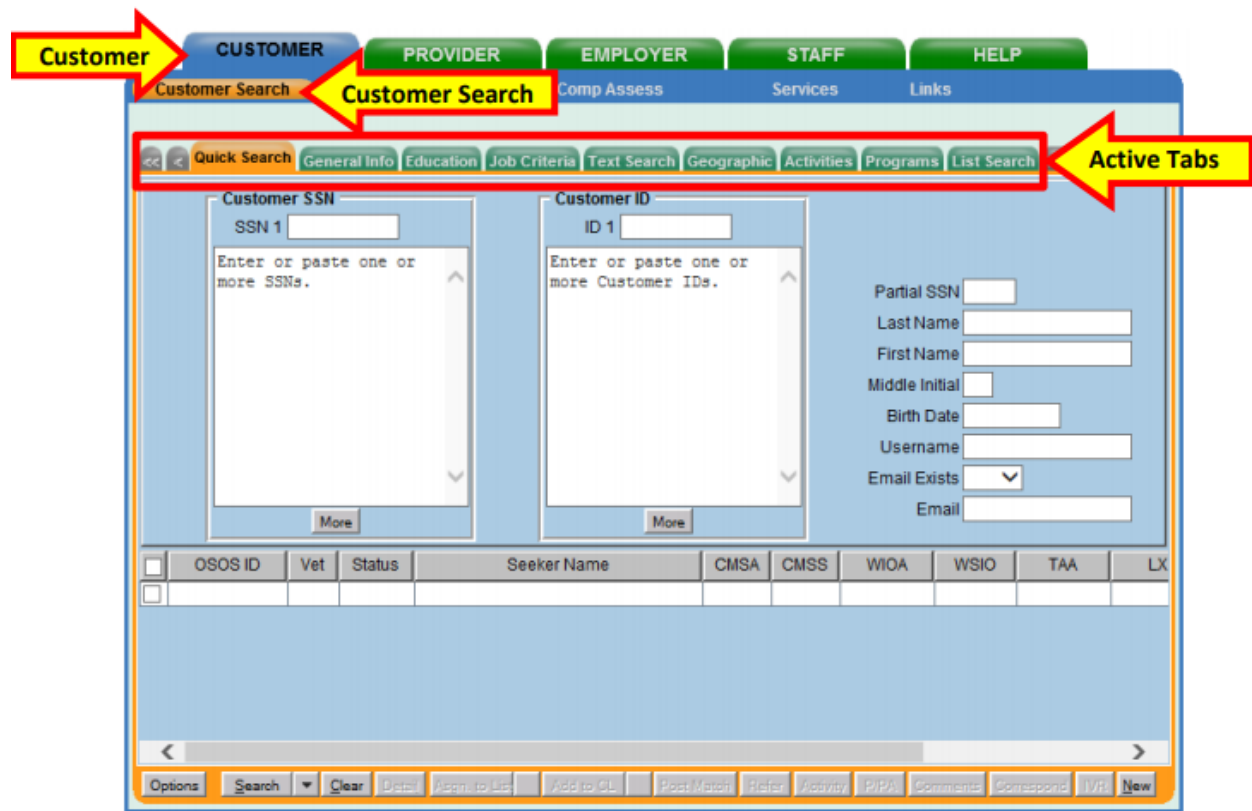
Please see the OYCEA City of Syracuse RFP for additional information on the OYCEA Program:  
[OYCEA RFP](#)

## 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.

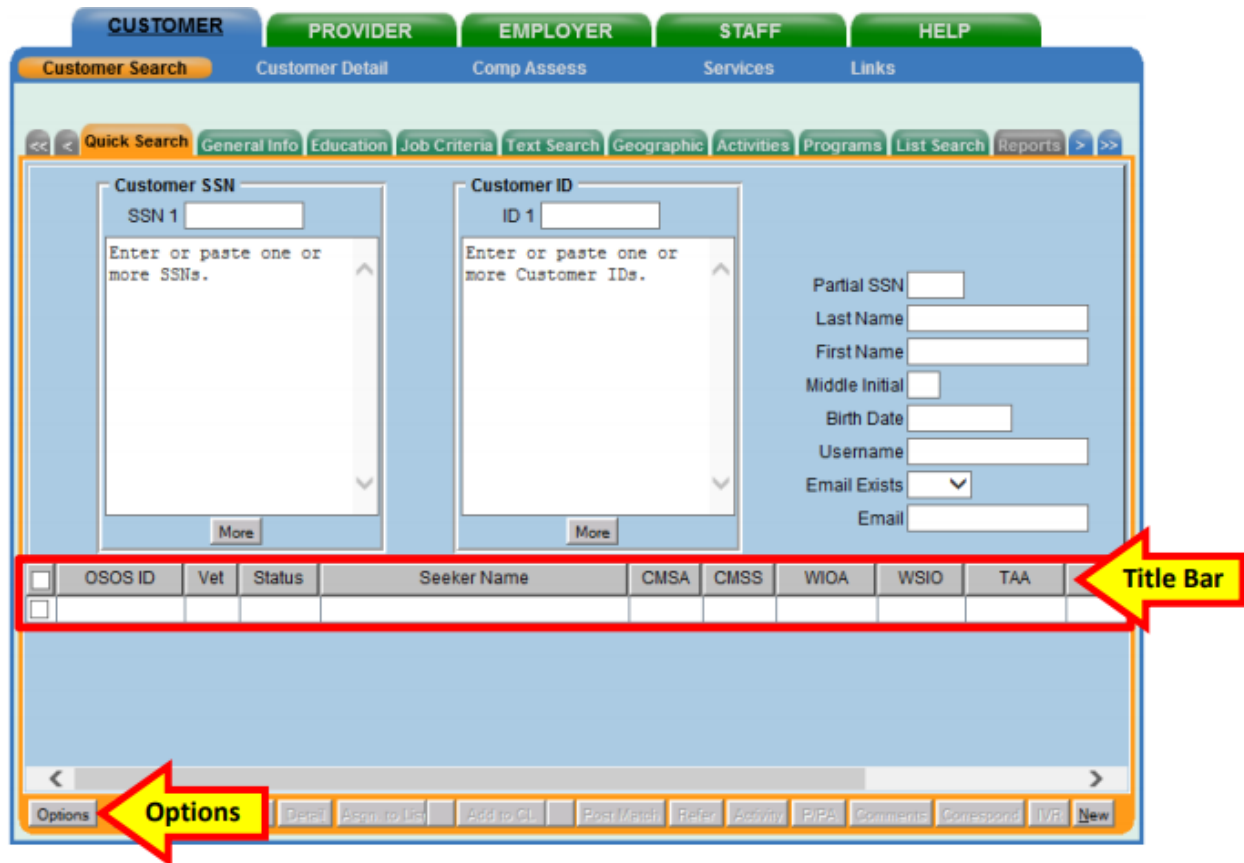


The screenshot shows the OSOS Customer Search interface. At the top, there is a navigation bar with tabs for **CUSTOMER**, **PROVIDER**, **EMPLOYER**, **STAFF**, and **HELP**. Below this is a sub-navigation bar with tabs for **Customer Search**, **Comp Assess**, **Services**, and **Links**. A yellow arrow points to the **Customer** tab in the top bar, and another yellow arrow points to the **Customer Search** tab in the sub-bar. Below the sub-bar is a row of tabs: **Quick Search**, **General Info**, **Education**, **Job Criteria**, **Text Search**, **Geographic**, **Activities**, **Programs**, and **List Search**. A red box highlights these tabs, and a yellow arrow points to it with the label **Active Tabs**. The main content area contains two large text input fields: **Customer SSN** (with sub-field **SSN 1**) and **Customer ID** (with sub-field **ID 1**). Both fields have a placeholder text: "Enter or paste one or more SSNs." and "Enter or paste one or more Customer IDs." respectively. 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 these 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 for **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**.

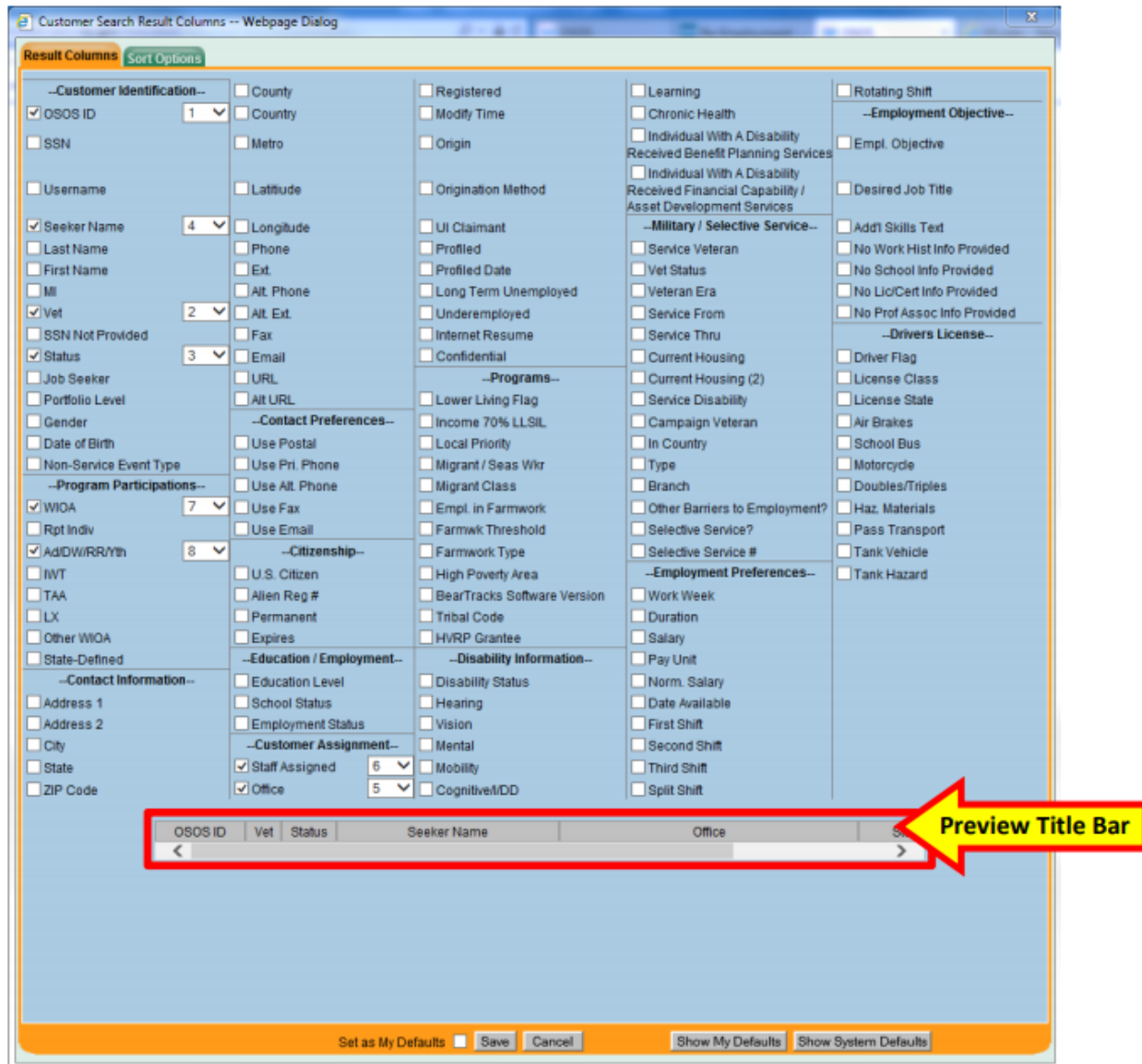
To access the search options, click on the **Options** button at the bottom left of the screen.



<input type="checkbox"/>	OSOS ID	Vet	Status	Seeker Name	CMSA	CMSS	WIOA	WSIO	TAA
<input type="checkbox"/>									

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](mailto: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**.

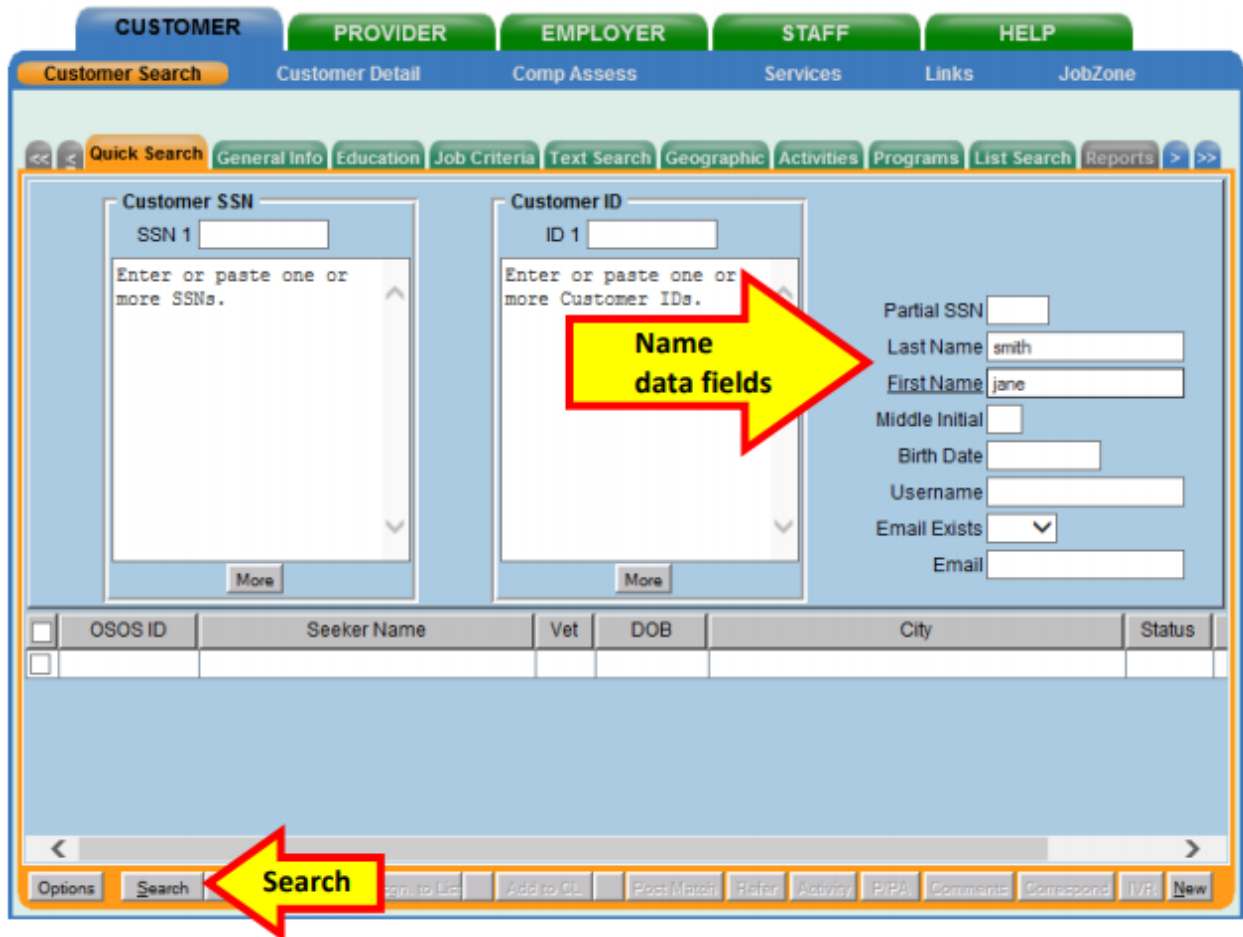
### SEARCHING BY CUSTOMER FULL OR PARTIAL NAME

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

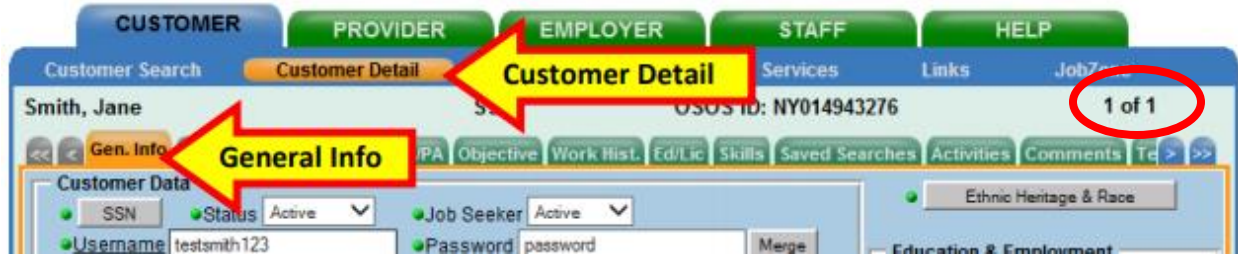
Click the **Search** button.



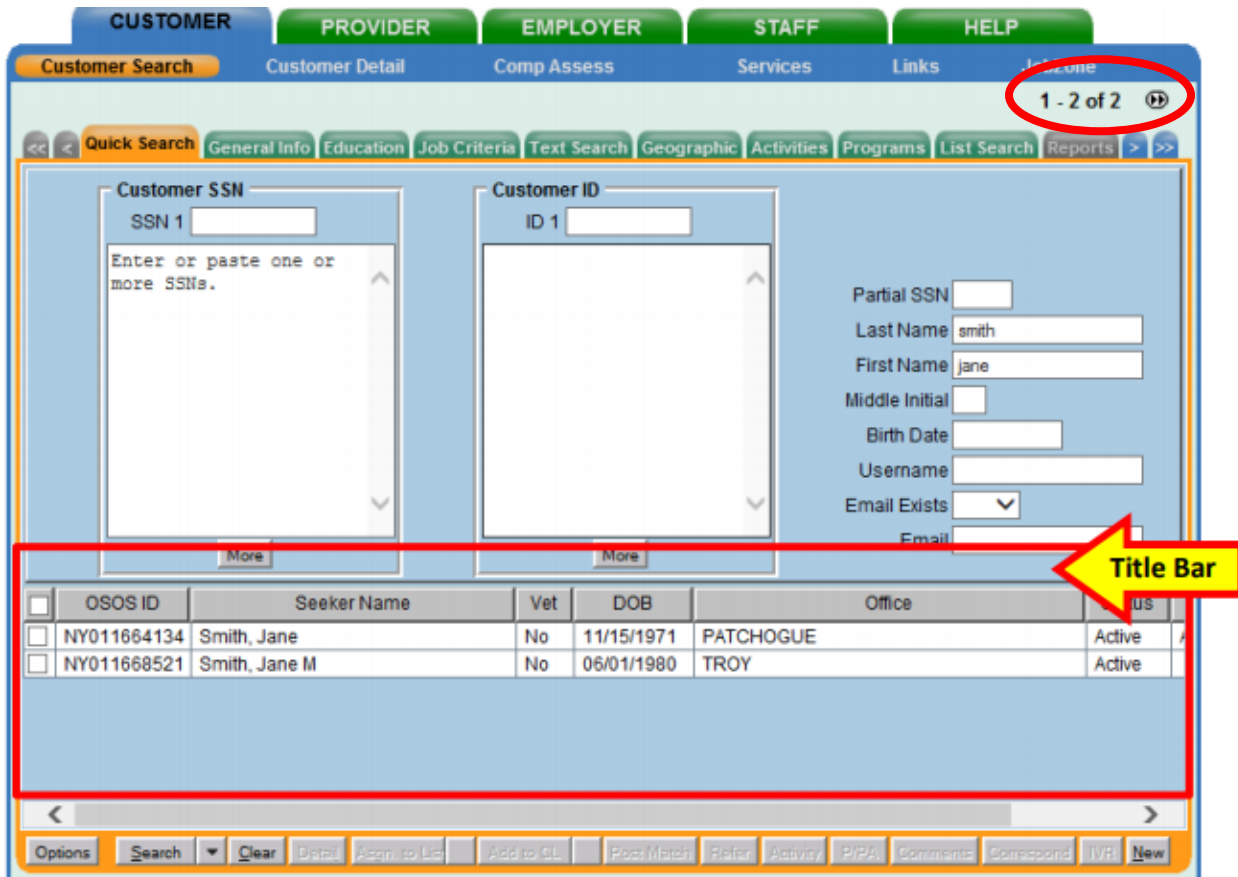
The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The 'Quick Search' sub-tab is selected, showing various search options like General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, and Reports. The main search area contains two large text boxes for 'Customer SSN' and 'Customer ID'. To the right, there are fields for 'Partial SSN', 'Last Name' (with 'smith' entered), 'First Name' (with 'jane' entered), 'Middle Initial', 'Birth Date', 'Username', 'Email Exists' (a dropdown menu), and 'Email'. A yellow arrow points to the 'Last Name' and 'First Name' fields with the text 'Name data fields'. At the bottom, there is a 'Search' button highlighted with a yellow arrow.

OSOS ID	Seeker Name	Vet	DOB	City	Status

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 Te >>

**Customer Data**

- SSN: testsmith123
- Status: Active
- Job Seeker: Active
- Username: testsmith123
- Password: password
- Merge
- Last Name: Smith
- First Name: Jane
- 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:
- Phone: 518-555-5555
- Ext:
- Alt:
- Ext:
- Fax:
- Email: janesmith@test.edu
- URL:
- U.S. Citizen:

Enrollments: JZ/CZ Manager  Add to Case Load

**Customer Assignment**

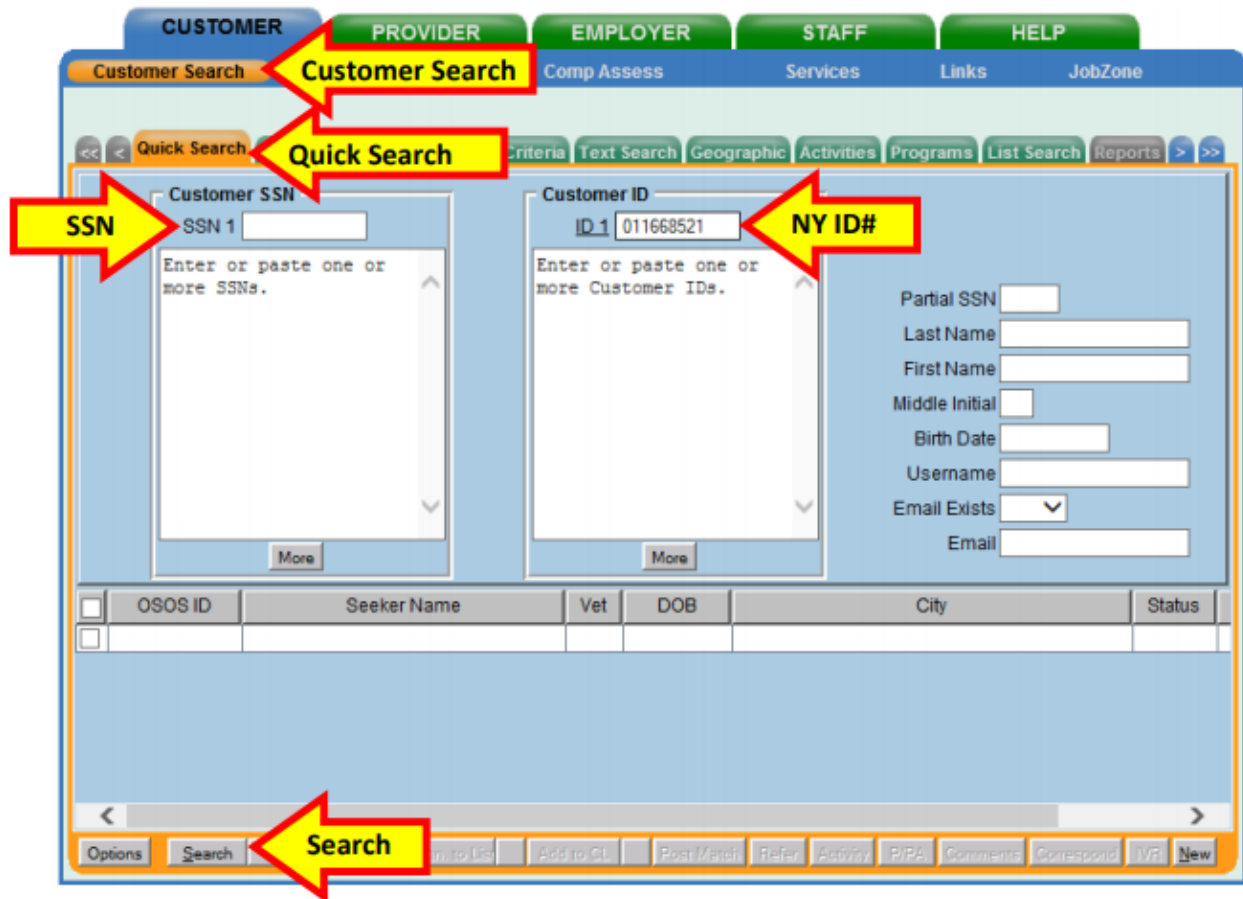
- Staff Assigned: Change
- WIB Assigned: Albany/Rensselaer/Schenectady Counties
- Agency: Department of Labor
- Office: ALBANY
- Change Office
- UI Claimant: Work Search Record
- Registered: 03/08/2017
- Origin: Staff
- Profiled:
- Profiled Date:
- Internet Resume:  Confidential:

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.



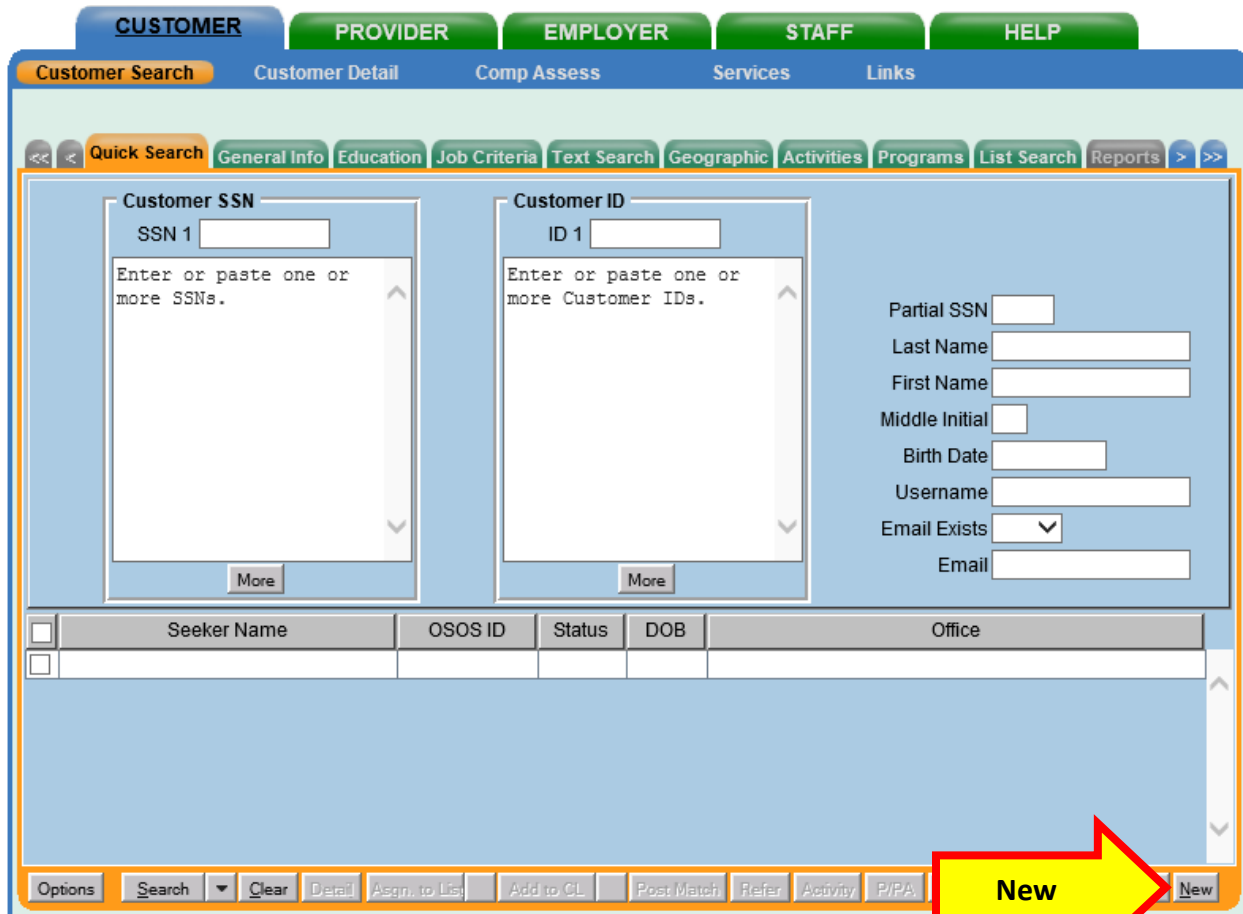
The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Comp Assess, Services, Links, and JobZone. The 'Customer Search' sub-tab is active, and within it, the 'Quick Search' sub-tab is selected. The 'Quick Search' area contains two main input fields: 'Customer SSN' (with a sub-field 'SSN 1') and 'Customer ID' (with a sub-field 'ID.1'). The 'Customer ID' field contains the value '011668521'. To the right of these fields are several other 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, Seeker Name, Vet, DOB, City, and Status. At the bottom of the interface is a 'Search' button, along with other buttons like 'Options', 'Add to CL', 'Post/Match', 'Refer', 'Activity', 'PIPA', 'Comments', 'Correspond', 'IVR', and 'New'. Red arrows point to the 'Customer Search' tab, the 'Quick Search' tab, the 'SSN' field, the 'NY ID#' field, and the 'Search' button.

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.



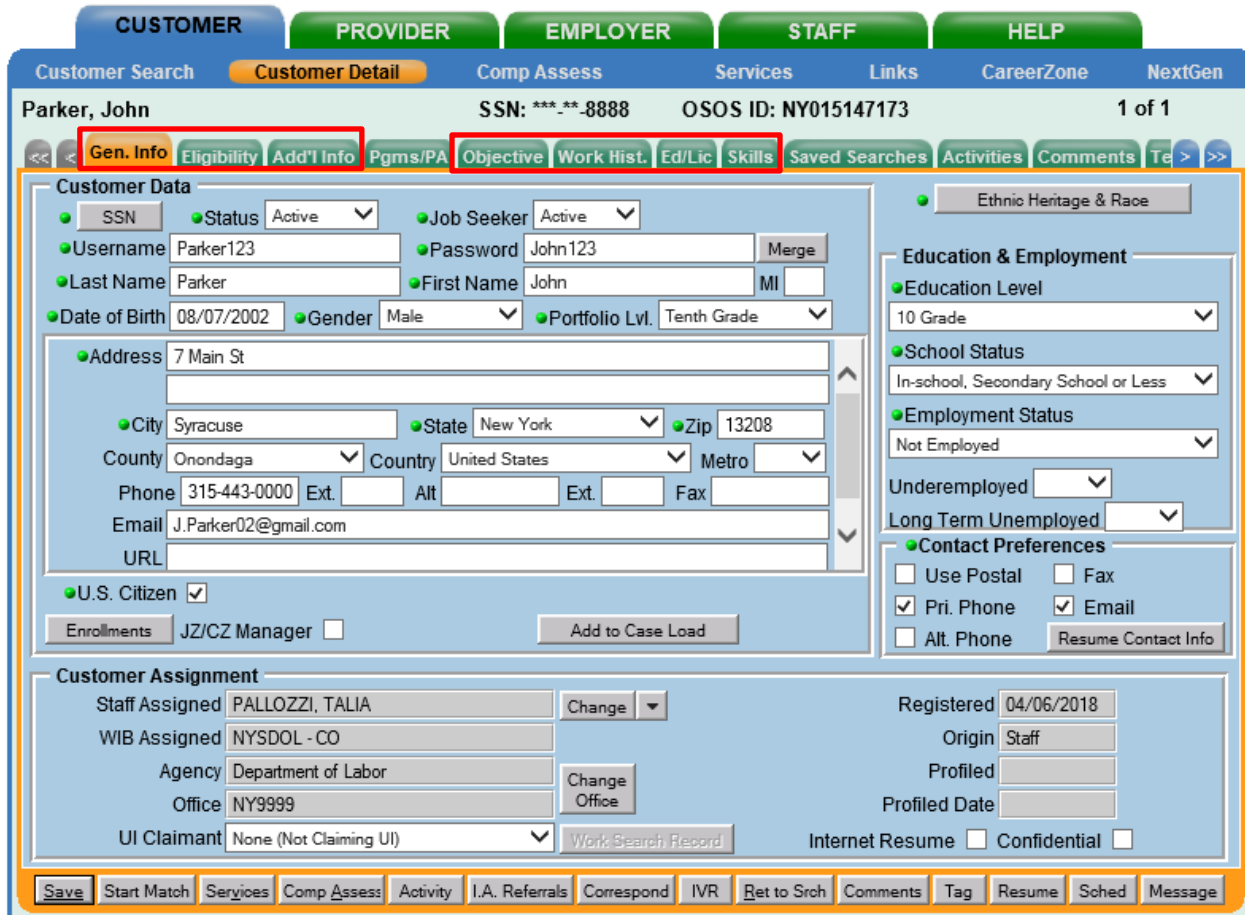
For detailed information on searching for a customer record, please see the [Performing a Customer Search OSOS Guide](#).

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 CareerZone 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 Active  Job Seeker Active  
 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 Main St  
 City Syracuse  State New York  Zip 13208  
 County Onondaga  Country United States  Metro  
 Phone 315-443-0000 Ext. Alt. Fax  
 Email J.Parker02@gmail.com  
 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 NY9999 Office  
 UI Claimant None (Not Claiming UI) Work Search Record

Ethnic Heritage & Race  
**Education & Employment**  
 Education Level 10 Grade  
 School Status In-school, Secondary School or Less  
 Employment Status Not Employed  
 Underemployed  
 Long Term Unemployed  
**Contact Preferences**  
 Use Postal  Fax  
 Pri. Phone  Email  
 Alt. Phone Resume Contact Info

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 Strch 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** - The 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 CareerZone 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; therefore anything may be entered that is at least 6 characters in length. All **Portfolio Lvl**s other than **JobZone Adult** will use these fields as login credentials for CareerZone. So, in this case, the Username must be unique, because the youth will use to login to their CareerZone account. Both the Username and Password must be 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.***

- **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:** Select **Yes, No**, or **Not Disclosed**. If **No** or **Not Disclosed** is selected, no additional information is required. However, if **Yes** is selected, it will display additional required fields.
  - **Selective Service:** All males over the age of 18 must be registered with Selective Service and this information must be recorded. Select the check box and enter the participant's Selective Service number. If the participant does not know their Selective Service number, click on **Register/Lookup**. This opens the Selective Service System website in a new browser tab. Use this site to conduct online verification of selective service registration using the participant's last name, SSN and date of birth.
- **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.

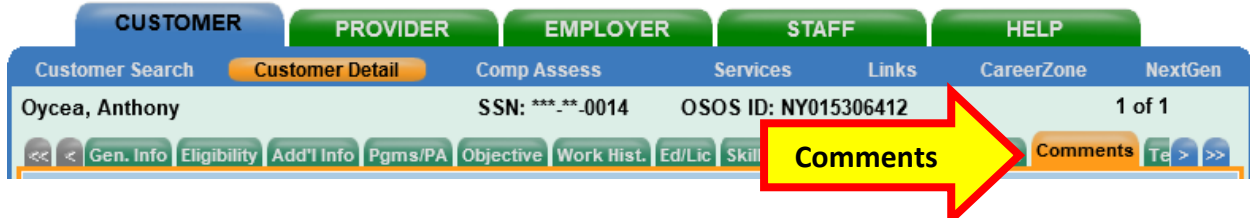


*Once the **Skills** tab is completed, and the entire basic customer record has been entered, click the **Save** button at the bottom of the screen. **Record Saved** will briefly be displayed in the upper right-hand corner when the record is successfully saved. If there are fields missing information, 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

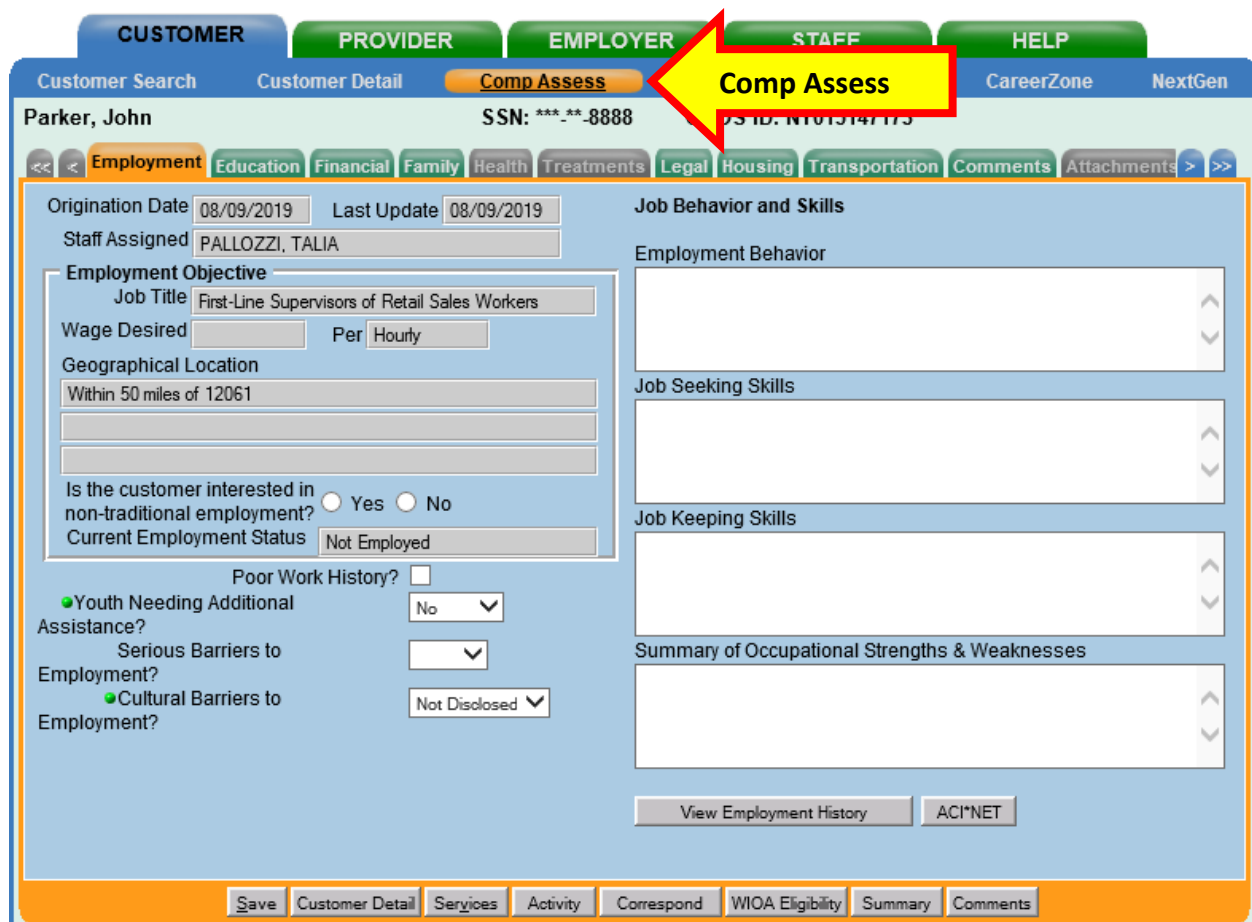
Information documented in the Comprehensive Assessment window is important for recording the customer's barriers and challenges. For detailed instructions on completing the Comprehensive Assessment, please see the [Comprehensive Assessment & Supplemental Data Guide](#).

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 a customer named Parker, John. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The 'Comp Assess' tab is highlighted in yellow with a red arrow pointing to it. Below the navigation bar, the customer's name and SSN are displayed. The main content area is divided into several sections:

- Employment Objective:** Includes fields for Origination Date (08/09/2019), Last Update (08/09/2019), Staff Assigned (PALLOZZI, TALIA), Job Title (First-Line Supervisors of Retail Sales Workers), Wage Desired, and Geographical Location (Within 50 miles of 12061).
- Employment Behavior:** A large text area for recording employment behavior.
- Job Seeking Skills:** A large text area for recording job seeking skills.
- Job Keeping Skills:** A large text area for recording job keeping skills.
- Summary of Occupational Strengths & Weaknesses:** A large text area for recording a summary of strengths and weaknesses.
- Barriers to Employment:** Includes questions about non-traditional employment, current employment status, youth needing assistance, and cultural barriers to employment.

At the bottom of the window, there are buttons for 'View Employment History' and 'ACI\*NET', and a footer bar with buttons for 'Save', 'Customer Detail', 'Services', 'Activity', 'Correspond', 'WIOA Eligibility', 'Summary', and 'Comments'.



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.

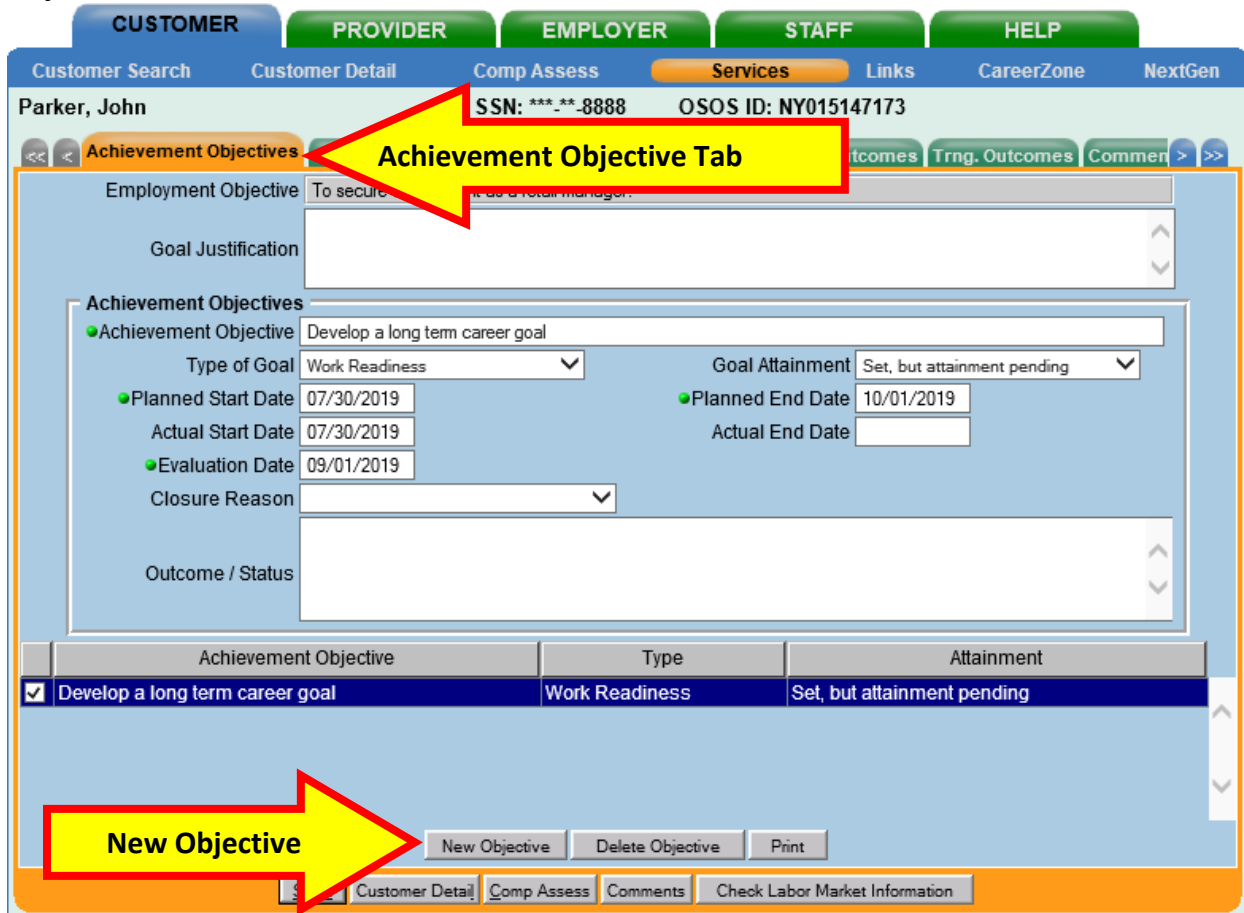
## SERVICES

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 Parker, John. The 'Services' window is active, and the 'Achievement Objectives' tab is selected. The form displays the following information:

- Customer:** Parker, John (SSN: \*\*\*-\*\*-8888, OSOS ID: NY015147173)
- Tab:** Achievement Objectives
- Employment Objective:** To secure... (partially obscured)
- Goal Justification:** [Empty text area]
- Achievement Objectives:**
  - Achievement Objective:** Develop a long term career goal
  - Type of Goal:** Work Readiness
  - Goal Attainment:** Set, but attainment pending
  - Planned Start Date:** 07/30/2019
  - Planned End Date:** 10/01/2019
  - Actual Start Date:** 07/30/2019
  - Actual End Date:** [Empty]
  - Evaluation Date:** 09/01/2019
  - Closure Reason:** [Empty dropdown]
  - Outcome / Status:** [Empty text area]
- Table:**

Achievement Objective	Type	Attainment
<input checked="" type="checkbox"/> Develop a long term career goal	Work Readiness	Set, but attainment pending
- Buttons:** New Objective, Delete Objective, Print

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

**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

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

Parker, John SSN: \*\*\*-\*\*-8888 OSOS ID: NY015147173

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

Employment Objective: To secure employment as a retail manager.

Goal Justification

**Achievement Objectives**

- Achievement Objective: Develop a long term career goal
  - Type of Goal: Work Readiness
  - Goal Attainment: Set, but attainment pending
  - Planned Start Date: 07/30/2019
  - Planned End Date: 10/01/2019
  - Actual Start Date: 07/30/2019
  - Actual End Date:
  - Evaluation Date: 09/01/2019
  - Closure Reason:
  - Outcome / Status:

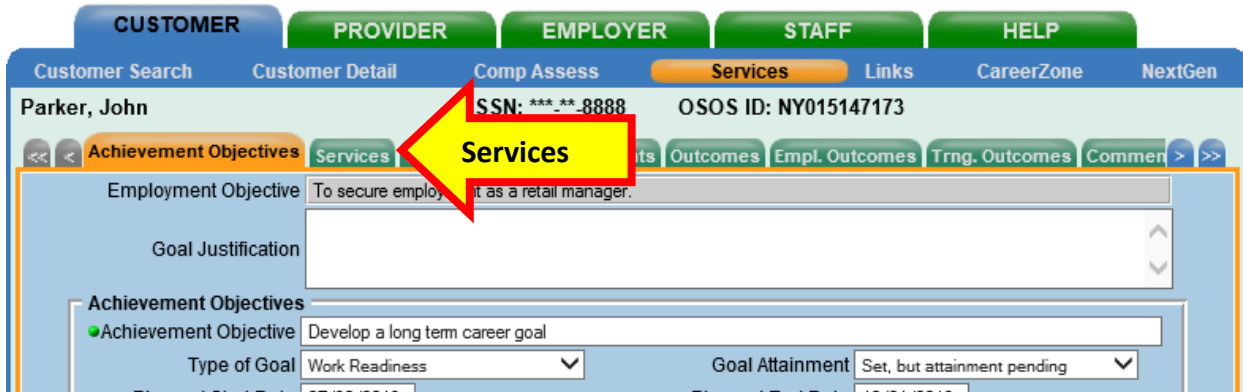
Achievement Objective	Type	Attainment
<input checked="" type="checkbox"/> Develop a long term career goal	Work Readiness	Set, but attainment pending

New Objective Delete Objective Print

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

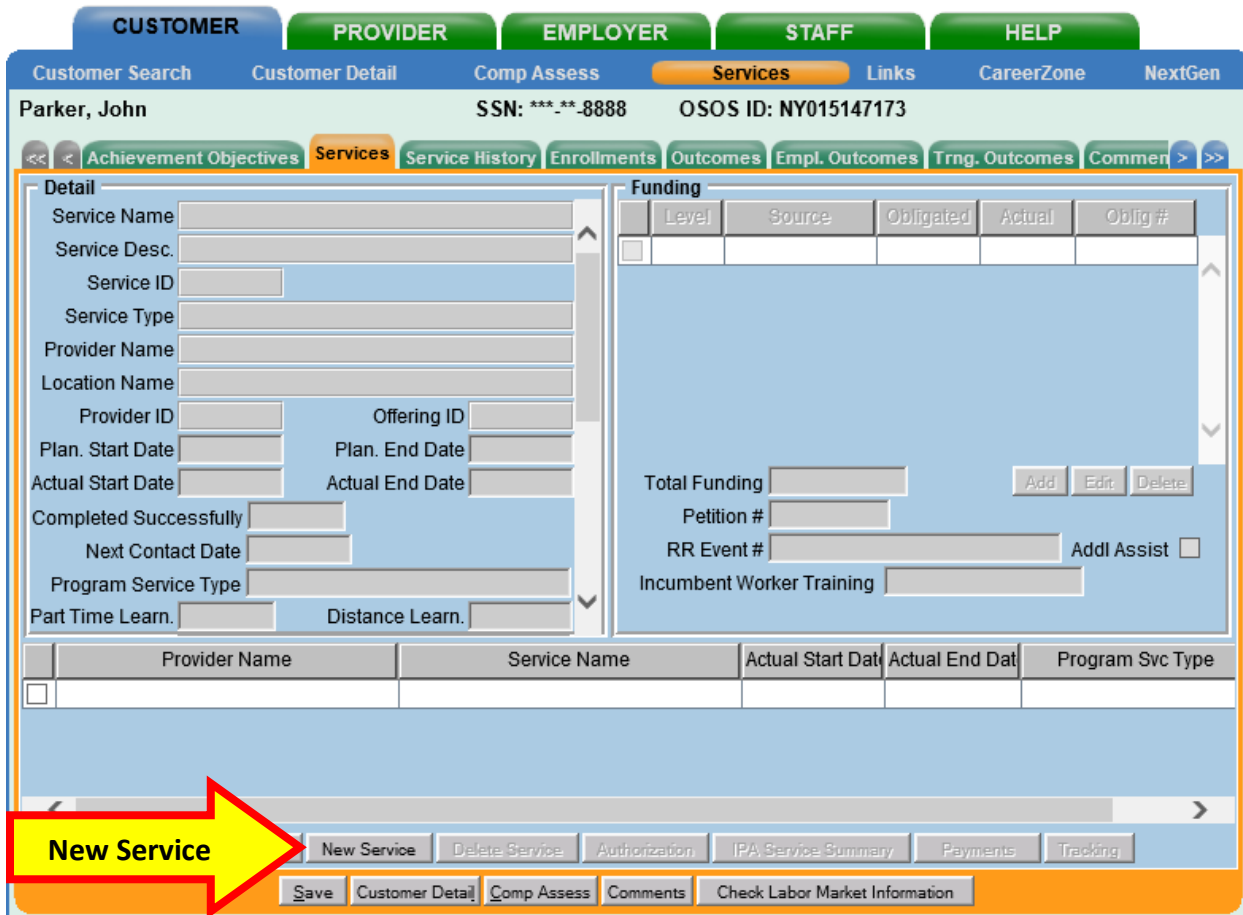
## ENTERING THE SERVICE

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



The screenshot shows the OSOS interface for a customer named Parker, John. The 'Services' tab is highlighted in the navigation menu. A red arrow points to the 'Services' tab. The interface displays an 'Achievement Objective' section with a goal to 'Develop a long term career goal' and a 'Type of Goal' set to 'Work Readiness'.

Select the **New Service** button.



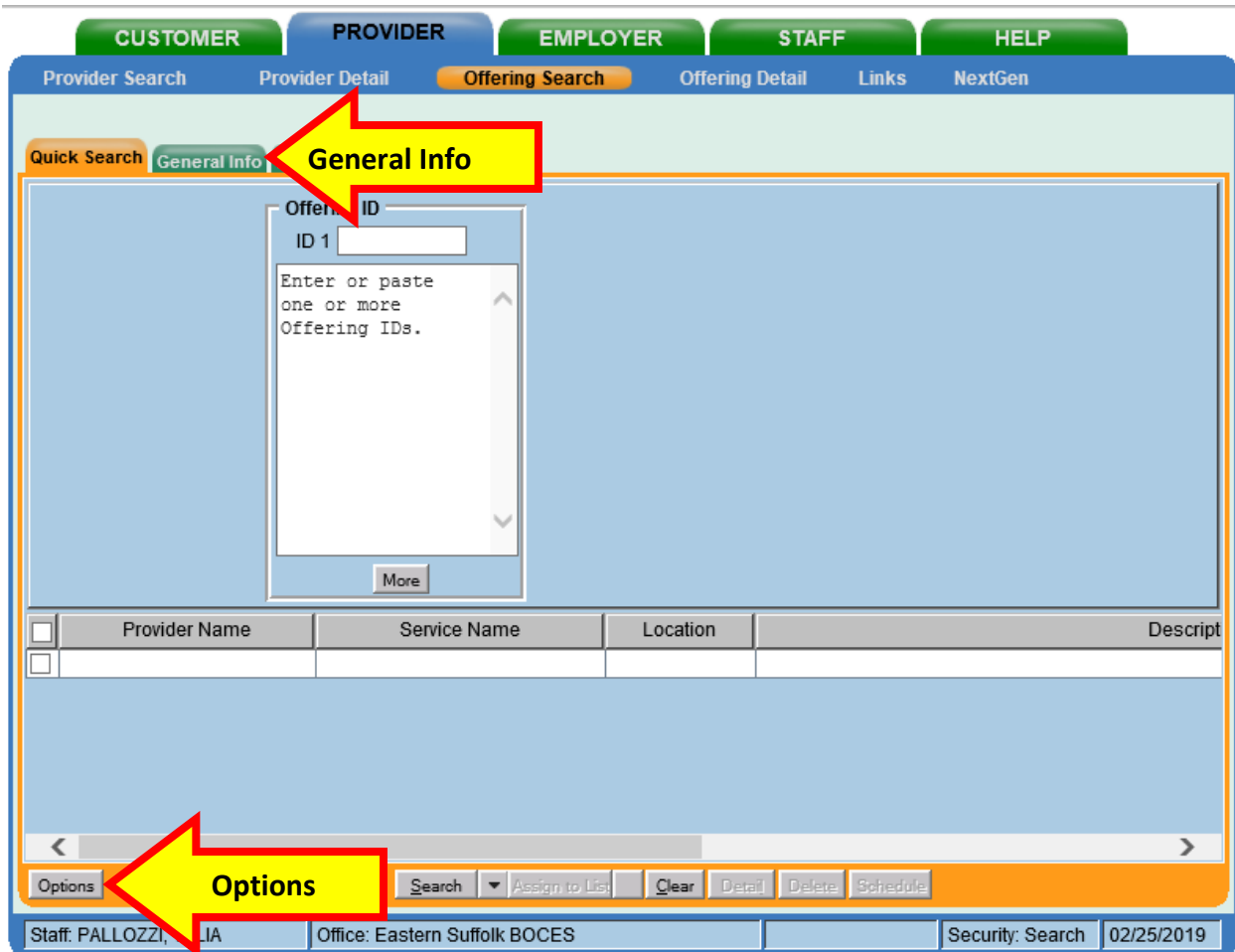
The screenshot shows the OSOS interface for a customer named Parker, John. The 'Services' tab is selected in the navigation menu. The 'New Service' button is highlighted in the bottom navigation bar. A red arrow points to the 'New Service' button. The interface displays a 'Detail' section with various fields for service information and a 'Funding' section with a table for funding details.

Level	Source	Obligated	Actual	Oblig #

Buttons at the bottom: Save, Customer Detail, **New Service**, Delete Service, Authorization, IPA Service Summary, Payments, Tracking, Comp Assess, Comments, Check Labor Market Information.

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.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (selected), Offering Detail, Links, and NextGen. The main content area has two sub-tabs: Quick Search and General Info (selected). A yellow arrow points to the 'General Info' tab. Below the tabs is a search form with a text input field labeled 'Offering ID' and a sub-label 'ID 1'. Below the input is a text area with the instruction 'Enter or paste one or more Offering IDs.' and a 'More' button. Below the search form is a table with columns: Provider Name, Service Name, Location, and Description. The table is currently empty. At the bottom of the interface, there is a toolbar with buttons: Options (highlighted with a yellow arrow), Search, Assign to List, Clear, Detail, Delete, and Schedule. The footer of the application shows: Staff: PALLOZZI, JIA | Office: Eastern Suffolk BOCES | Security: Search | 02/25/2019.



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. This will ensure that your selections will be saved as default search options and will not need to be selected each session.

Then, click **Save**.

Offering Search Result Columns -- Webpage Dialog

Result Columns Sort Options

--Service Offering--

Provider Offering ID

Location

Provider Service ID

Cost

Start Date

End Date

Start Time

End Time

Total Seats

Available Seats

Sun.

Mon.

Tue.

Wed.

Thu.

Fri.

Sat.

Description

Offering Modify Time

# Seeker Services

PFP

ETP Status Code

Industry Certified

Apprentice

License

Associates

Bachelors

Comm College Cert

High School Equiv

Employment

Measure Skill Gain Leading to Credential

Measure Skill Gain Leading To Employment

--Provider Information--

Provider Name 1

Federal ID (FEIN)

State ID (EIN)

Address 1

Address 2

City

State

ZIP Code

Provider Phone

Ext.

Provider URL

Provider Email

Organization Type

Provider Status

Staff Assigned

Prov Creation Time

Prov Modify Time

--Provider Location--

Location Suffix

Location Name 4

Location Addr 1

Location Addr 2

Location City

Location State

Location ZIP Code

Location WIB

Location Delete?

Location Mod Time

--Provider Service--

Service Type

Service Category

Service Name 2

Service Description 3

Training Credit Hrs

Hours

Days

Weeks

WIOA Eligible Status

CIP Code

O\*Net Title

Training Prerequisite

Credential Name

Part Time Learning

Distance Learning

Online Learning

E-Learning

In Person

Delete?

Service Modify Time

Provider Name Service Name Description

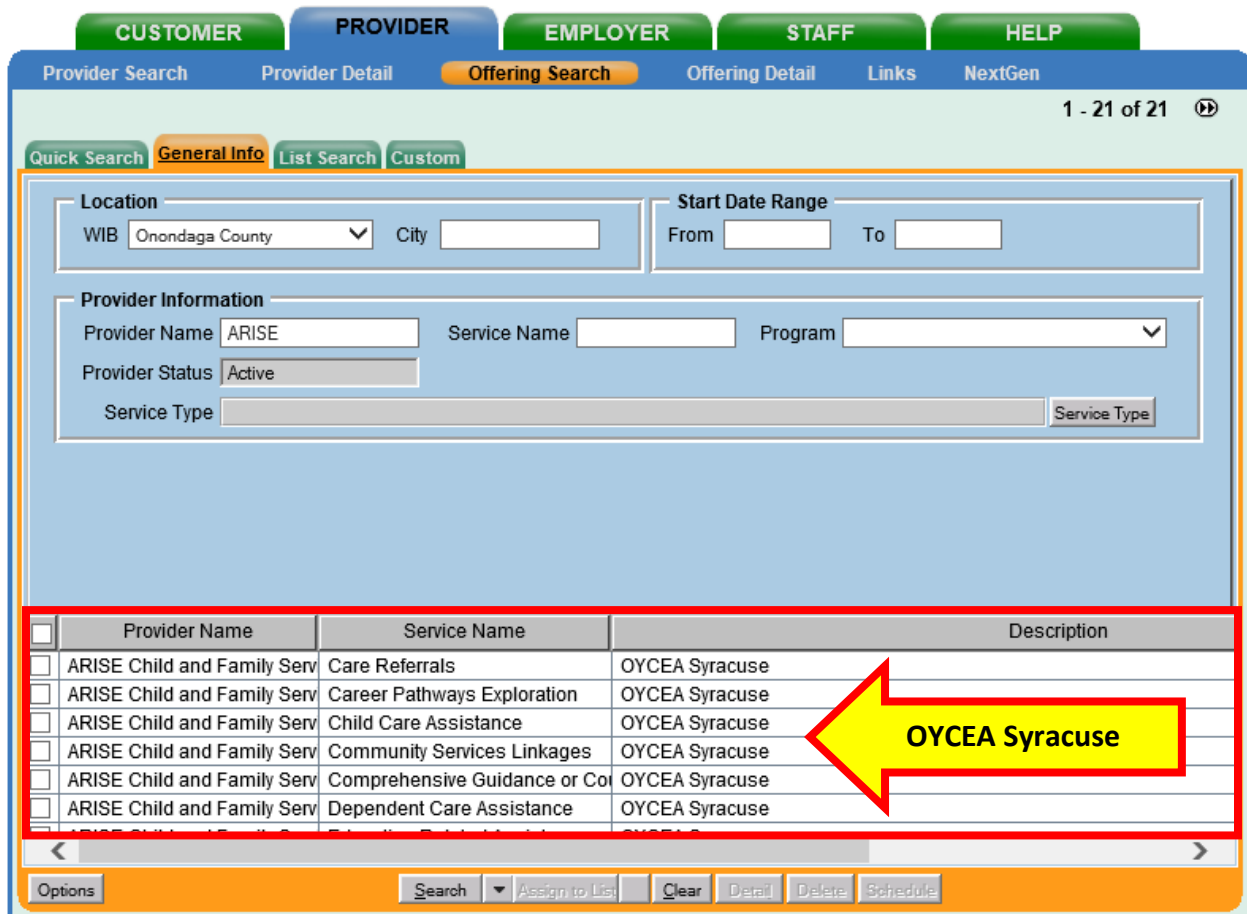
Set as My Defaults  Save Cancel Show My Defaults Show System Defaults



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 Syracuse** offerings.



<input type="checkbox"/>	Provider Name	Service Name	Description
<input type="checkbox"/>	ARISE Child and Family Serv	Care Referrals	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Career Pathways Exploration	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Child Care Assistance	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Community Services Linkages	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Comprehensive Guidance or Co	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Dependent Care Assistance	OYCEA Syracuse



*All of the Services for OYCEA participants will be identified by listing **OYCEA Syracuse** 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 - 21 of 21

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  Service Type

<input type="checkbox"/>	Provider Name	Service Name	Description
<input type="checkbox"/>	ARISE Child and Family Serv	Care Referrals	OYCEA Syracuse
<input checked="" type="checkbox"/>	ARISE Child and Family Serv	Career Pathways Exploration	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Child Care Assistance	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Community Services Linkages	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Comprehensive Guidance or Co	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Dependent Care Assistance	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Education Related Assistance	OYCEA Syracuse

Options    Search    Assign to List    Clear    Detail    Delete    Schedule

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**.

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 City of Syracuse), 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 City of Syracuse), and the appropriate **Achievement Objective**.

Click the **Save** button.

The screenshot shows the OSOS interface for the 'Services' window. The 'Detail' section is highlighted with a red border and contains the following fields:

Plan. Start Date	08/01/2019	Plan. End Date	08/01/2019
Actual Start Date	08/01/2019	Actual End Date	08/01/2019
Completed Successfully	Yes		
Next Contact Date			
Program Service Type	Youth Services		
Part Time Learn.		Distance Learn.	
Program	OYCEA City of Syracuse		
Minimum Hours		Number of Weeks	
O*Net		O*Net	
NAICS		NAICS	
Min. Prog. Agreed			
Achv. Objective	Develop a long term career goal		
Staff Assigned		Change	

The 'Funding' section is also visible, with a table structure:

Level	Source	Obligated	Actual	Oblig #

At the bottom of the window, there is a 'Save' button highlighted with a yellow arrow.

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](#) [CareerZone](#) [NextGen](#)

Parker, John      SSN: \*\*\*-\*\*-8888      OSOS ID: NY015147173

[Achievement Objectives](#) [Services](#) [Service History](#) [Enrollments](#) [Outcomes](#) [Empl. Outcomes](#) [Trng. Outcomes](#) [Comments](#)

**Detail**

Plan. Start Date: 08/01/2019    Plan. End Date: 08/01/2019

Actual Start Date: 08/01/2019    Actual End Date: 08/01/2019

Completed Successfully: Yes

Next Contact Date:

Program Service Type: Youth Services

Part Time Learn.:     Distance Learn.:

Program: OYCEA City of Syracuse

Minimum Hours:     Number of Weeks:

O\*Net:     O\*Net:

NAICS:     NAICS:

Min. Prog. Agreed:

Achv. Objective: Develop a long term career goal

Staff Assigned:  [Change](#)

**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 checked="" type="checkbox"/>	ARISE Child and Family Service Inc	Career Pathways Exploration	08/01/2019	08/01/2019	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](#)



The **Funding Webpage Dialogue** box will open. For services that start prior to July 1, 2019, select **Youth Statewide 15%** funding for **2018**. For services that start July 1, 2019 or after, select **Youth Statewide 15%** funding for **2019**.

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	Youth Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	State	Youth Statewide 15%	2018	\$ 99898.00	
<input checked="" type="checkbox"/>	WIB	Youth Statewide 15%	2019	\$ 100000.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	State	Dislocated Worker Statewide 15%	2018	\$ 99996.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2019	\$ 100000.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	State	Adult Statewide 15%	2018	\$ 99998.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2019	\$ 100000.00	
<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"/>	Local Office	NYESS - ACCES-VR Extended	2017	\$ 10000.00	
<input type="checkbox"/>	Local Office	NYESS - ACCES-VR UCS	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 \$ 1.00 x

OR

Obligated Percentage 100

WIB Onondaga County

Office ARISE - Onondaga Co

Region Central New York

OK

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 CareerZone NextGen

Parker, John SSN: \*\*\*-\*\*-8888 OSOS ID: NY015147173

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

**Detail**

Plan. Start Date: 08/01/2019 Plan. End Date: 08/01/2019

Actual Start Date: 08/01/2019 Actual End Date: 08/01/2019

Completed Successfully: Yes

Next Contact Date:

Program Service Type: Youth Services

Part Time Learn.  Distance Learn.

Program: OYCEA City of Syracuse

Minimum Hours  Number of Weeks

O\*Net  NAICS

Min. Prog. Agreed

Achv. Objective: Develop a long term career goal

Staff Assigned

**Funding**

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

Total Funding: \$ 1.00 Add Edit Delete

Petition #

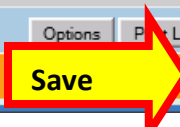
RR Event #

Incumbent Worker Training

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/>	ARISE Child and Family Service Inc	Career Pathways Exploration	08/01/2019	08/01/2019	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





## 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 CareerZone NextGen

Parker, John SSN: \*\*\*-\*\*-8888 OSOS ID: NY015147173

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

**Detail**

Plan. Start Date 08/05/2019 Plan. End Date 08/08/2019

Actual Start Date 08/05/2019 Actual End Date

Completed Successfully  Next Contact Date

Program Service Type Youth Services

Part Time Learn. Distance Learn.

Program OYCEA City of Syracuse

Minimum Hours Number of Weeks

O\*Net NAICS

Min. Prog. Agreed

Achv. Objective Develop a long term career goal

Staff Assigned

**Funding**

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WIB Youth Statewide	\$ 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"/>	ARISE Child and Family Service Inc	Career Pathways Exploration	08/01/2019	08/01/2019	Youth Services
<input checked="" type="checkbox"/>	ARISE Child and Family Service Inc	Financial Literacy Education	08/05/2019	.	Youth Services

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

Customer Detail Comp Assess Comments Check Labor Market Information

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   CareerZone   NextGen

Parker, John   SSN: \*\*\*-\*\*-8888   OSOS ID: NY015147173

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

**Detail**

Plan. Start Date: 08/05/2019   Plan. End Date: 08/08/2019  
 Actual Start Date: 08/05/2019   **Actual End Date: 08/08/2019**  
**Completed Successfully: Yes**  
 Next Contact Date:   
 Program Service Type: Youth Services  
 Part Time Learn.:    Distance Learn.:   
 Program: OYCEA City of Syracuse  
 Minimum Hours:    Number of Weeks:   
 O\*Net:    NAICS:   
 Min. Prog. Agreed:   
 Achv. Objective: Develop a long term career goal  
 Staff Assigned:    Change

**Funding**

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WIB 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"/>	ARISE Child and Family Service Inc	Career Pathways Exploration	08/01/2019	08/01/2019	Youth Services
<input checked="" type="checkbox"/>	ARISE Child and Family Service Inc	Financial Literacy Education	08/05/2019	08/08/2019	Youth Services

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

**Save**   **Save**   Comp Assess   Comments   Check Labor Market Information



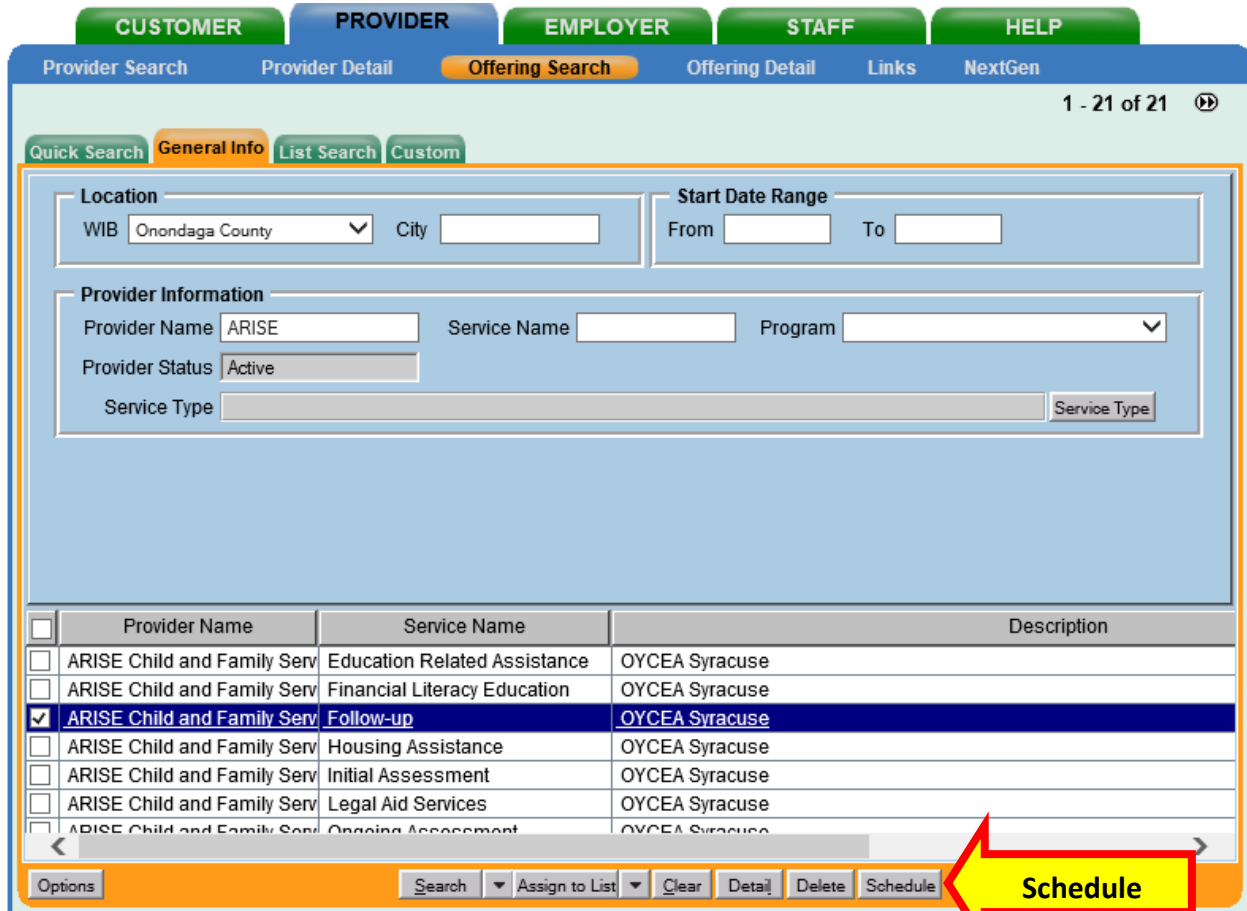
## FOLLOW UP SERVICES

The process for entering follow up services is similar to the directions above. Navigate to the **Customer** module, **Services** window, **Services** tab. Select the **New Service** button. This will bring you 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 Syracuse** offerings (as indicated in the Description column). Select **Follow up** (as indicated in the Service Name column).

Click the **Schedule** button.



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

1 - 21 of 21

Quick Search    **General Info**    List Search    Custom

**Location**  
 WIB: Onondaga County    City:   
**Start Date Range**  
 From:     To:

**Provider Information**  
 Provider Name: ARISE    Service Name:     Program:   
 Provider Status: Active  
 Service Type:     Service Type

<input type="checkbox"/>	Provider Name	Service Name	Description
<input type="checkbox"/>	ARISE Child and Family Serv	Education Related Assistance	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Financial Literacy Education	OYCEA Syracuse
<input checked="" type="checkbox"/>	ARISE Child and Family Serv	Follow-up	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Housing Assistance	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Initial Assessment	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Legal Aid Services	OYCEA Syracuse
<input type="checkbox"/>	ARISE Child and Family Serv	Ongoing Assessment	OYCEA Syracuse

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



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 after the **Actual End Date** of the last enrolling/non follow up service.*

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

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

Parker, John   SSN: \*\*\*-\*\*-8888   OSOS ID: NY015147173

**Detail**

Location Name: ARISE  
Provider ID: 73976   Offering ID: 141664

Plan. Start Date: 08/09/2019   Plan. End Date: 08/09/2019  
Actual Start Date: 08/09/2019   Actual End Date: 08/09/2019

Completed Successfully:    
Next Contact Date:

Program Service Type: Follow Up

Part Time Learn.:    Distance Learn.:

Program: OYCEA City of Syracuse

Minimum Hours:    Number of Weeks:

O\*Net:    O\*Net:

NAICS:    NAICS:

Min. Prog. Agreed:

**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"/>	ARISE Child and Family Service Inc	Career Pathways Exploration	08/01/2019	08/01/2019	Youth Services
<input type="checkbox"/>	ARISE Child and Family Service Inc	Financial Literacy Education	08/05/2019	08/08/2019	Youth Services
<input checked="" type="checkbox"/>	ARISE Child and Family Service Inc	Follow-up	08/09/2019	08/09/2019	Follow Up

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

**Save**   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.

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

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

Parker, John   SSN: \*\*\*-\*\*-8888   OSOS ID: NY015147173

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

**Detail**

Location Name: ARISE

Provider ID: 73976   Offering ID: 141664

Plan. Start Date: 08/09/2019   Plan. End Date: 08/09/2019

Actual Start Date: 08/09/2019   Actual End Date: 08/09/2019

Completed Successfully:    
 Next Contact Date:

Program Service Type: Follow Up

Part Time Learn.:    Distance Learn.:

Program: OYCEA City of Syracuse

Minimum Hours:    Number of Weeks:

O\*Net:    O\*Net:

NAICS:    NAICS:

Min. Prog. Agreed:

**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 Dat	Actual End Dat	Program Svc Type
<input type="checkbox"/>	ARISE Child and Family Service Inc	Career Pathways Exploration	08/01/2019	08/01/2019	Youth Services
<input type="checkbox"/>	ARISE Child and Family Service Inc	Financial Literacy Education	08/05/2019	08/08/2019	Youth Services
<input checked="" type="checkbox"/>	ARISE Child and Family Service Inc	Follow-up	08/09/2019	08/09/2019	Follow Up

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

Save   Customer Detail   Comp Assess   Comments   Check Labor Market Information



The **Funding Webpage Dialogue** box will open. For services that start prior to July 1, 2019, select **Youth Statewide 15%** funding for **2018**. For services that start July 1, 2019 or after, select **Youth Statewide 15%** funding for **2019**.

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

Funding -- Webpage Dialog

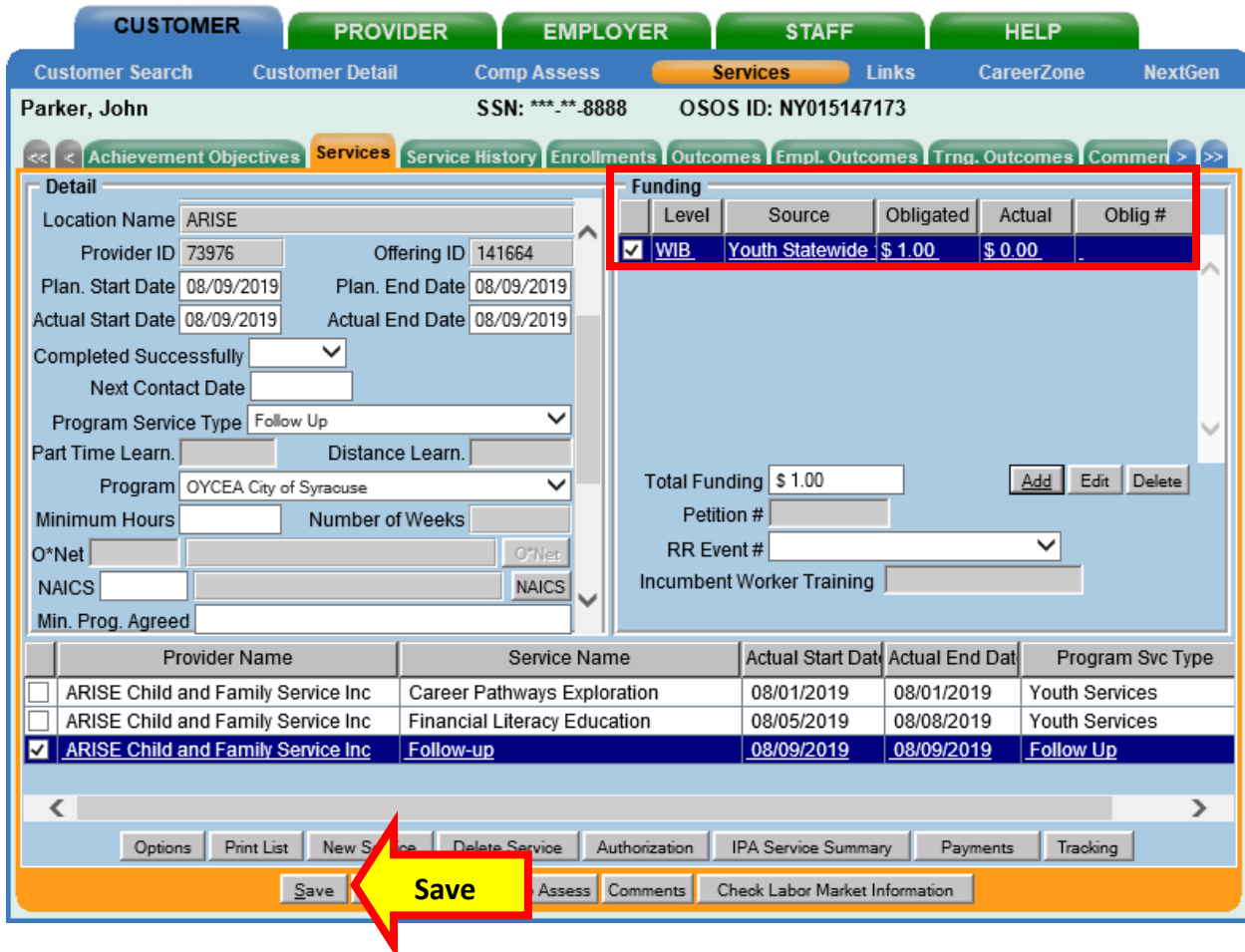
**Funding**

	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	WIB	Youth Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	State	Youth Statewide 15%	2018	\$ 99898.00	
<input checked="" type="checkbox"/>	WIB	Youth Statewide 15%	2019	\$ 99998.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	State	Dislocated Worker Statewide 15%	2018	\$ 99996.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2019	\$ 100000.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	State	Adult Statewide 15%	2018	\$ 99998.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2019	\$ 100000.00	
<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"/>	Local Office	NYESS - ACCES-VR Extended	2017	\$ 10000.00	
<input type="checkbox"/>	Local Office	NYESS - ACCES-VR UCS	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.



**Detail**

Location Name: ARISE  
 Provider ID: 73976 Offering ID: 141664  
 Plan. Start Date: 08/09/2019 Plan. End Date: 08/09/2019  
 Actual Start Date: 08/09/2019 Actual End Date: 08/09/2019  
 Completed Successfully:   
 Next Contact Date:   
 Program Service Type: Follow Up  
 Part Time Learn.  Distance Learn.   
 Program: OYCEA City of Syracuse  
 Minimum Hours  Number of Weeks   
 O\*Net  O\*Net   
 NAICS  NAICS   
 Min. Prog. Agreed

**Funding**

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WIB	Youth Statewide	\$ 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"/>	ARISE Child and Family Service Inc	Career Pathways Exploration	08/01/2019	08/01/2019	Youth Services
<input type="checkbox"/>	ARISE Child and Family Service Inc	Financial Literacy Education	08/05/2019	08/08/2019	Youth Services
<input checked="" type="checkbox"/>	ARISE Child and Family Service Inc	Follow-up	08/09/2019	08/09/2019	Follow Up

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

**Save**



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