

Provider Search and Documenting Services to Youth Program Customers



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PURPOSE

This guide will provide a comprehensive overview of searching for Youth Program offerings and attaching services to youth records.

Important Definitions

Providers – Providers are approved organizations in a local area that offer services to youth participants. Providers can offer services in multiple locations within a Local Workforce Development Board (LWDB).

Services – Under the Workforce Innovation and Opportunity Act (WIOA), the LWDB is tasked with ensuring that all 14 WIOA Youth elements are available in its area. This is achieved by local providers, who may offer one or more program elements.

Offerings – Offerings are entered in OSOS by designated local area staff. They are used to designate where and when the service will take place. Offerings also provide information regarding language, number of available seats, and other pertinent service information. Local areas can provide multiple offerings for the same service element.



OSOS Terms

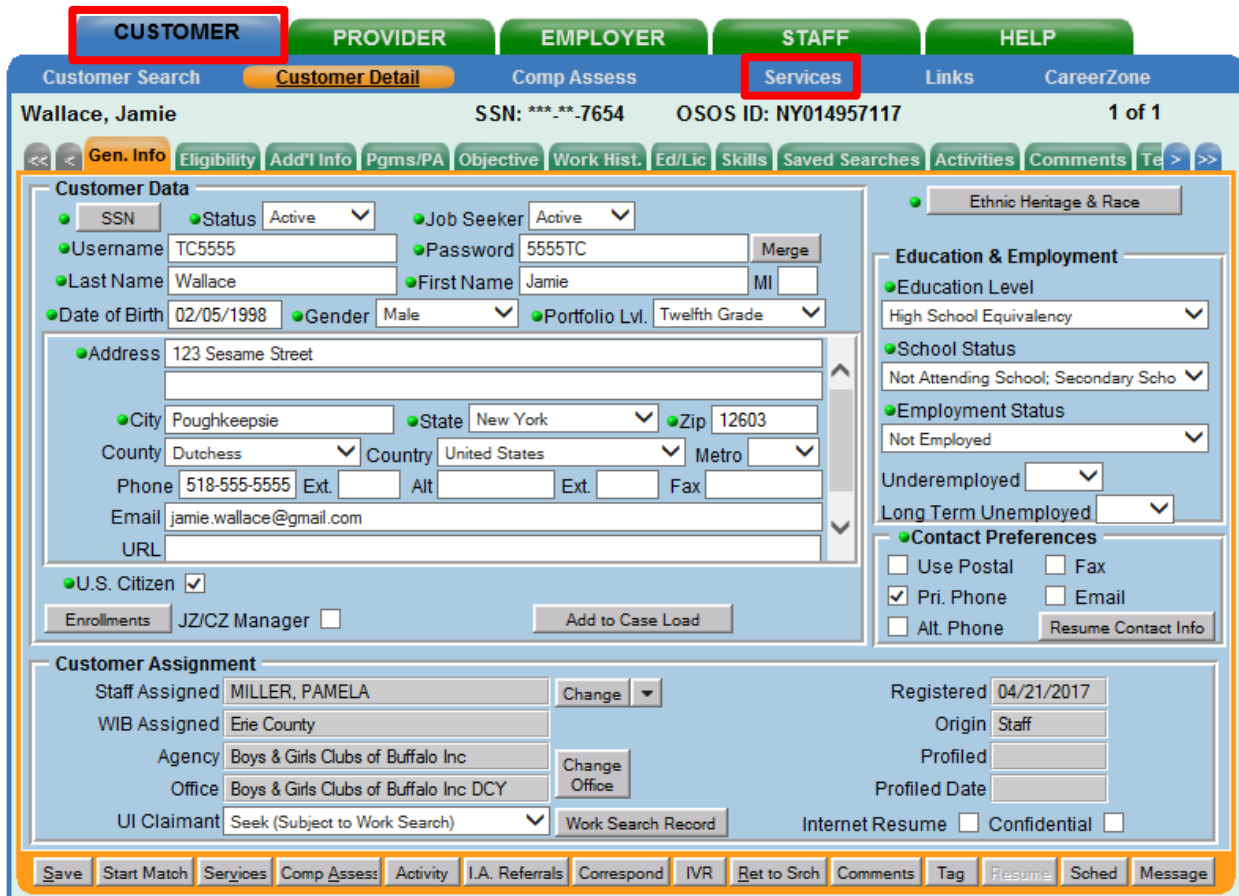
OSOS is comprised of Modules, Windows, Tabs, and functional Buttons as illustrated in the screenshot below. These terms will be referenced throughout this guide.

The screenshot displays the OSOS web application interface for a customer record. The interface is organized into several key areas:

- Modules:** A top navigation bar with buttons for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP.
- Windows:** A secondary navigation bar with buttons for Customer Search, Customer Detail (highlighted), Comp Assess, Services, Links, and JobZone.
- Header:** Displays the customer name "Customer, Example", SSN: ***-**-****, OSOS ID: NY014950531, and "1 of 0" records.
- Tabs:** A row of tabs for navigation: Gen. Info (selected), Eligibility, Add'l Info, Pgms/PA, Objective, Work Hist., Ed/Lic, Skills, Saved Searches, Activities, Comments, and Te.
- Customer Data:** A form containing various fields:
 - SSN, Status (Active), Job Seeker (Active)
 - Username (TC1234), Password (490\$#kw0), Merge button
 - Last Name (Customer), First Name (Example), MI
 - Date of Birth (09/09/1998), Gender (Male), Portfolio Lvl. (JobZone Adult)
 - Address (221B Baker Street)
 - City (Queensbury), State (New York), Zip (12804)
 - County, Country (United States), Metro
 - Phone (518-111-5248), Ext., Alt., Fax
 - Email (example.customer@gmail.com), URL
 - U.S. Citizen (checked)
 - Enrollments, JZ/CZ Manager, Add to Case Load
- Customer Assignment:** Fields for Staff Assigned (BAERTSCHI, ADAM), WIB Assigned (Saratoga/Warren/Washington Counties), Agency (Department of Labor), Office (GLENS FALLS), UI Claimant (None (Not Claiming UI)), Registered, Origin (Staff), Profiled, Profiled Date, Internet Resume, and Confidential.
- Buttons:** A bottom bar with buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Targ, Resume, Sched, and Message.

PROVIDER SEARCH

To begin, locate the correct customer record. From the **Customer** module, navigate to the **Services** window (highlighted in the screenshot below).



CUSTOMER | PROVIDER | EMPLOYER | STAFF | HELP

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

Wallace, Jamie | SSN: ***-**-7654 | OSOS ID: NY014957117 | 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: TC5555 | Password: 5555TC | Merge
- Last Name: Wallace | First Name: Jamie | MI: []
- Date of Birth: 02/05/1998 | Gender: Male | Portfolio Lvl: Twelfth Grade
- Address: 123 Sesame Street
- City: Poughkeepsie | State: New York | Zip: 12603
- County: Dutchess | Country: United States | Metro: []
- Phone: 518-555-5555 | Ext.: [] | Alt: [] | Ext.: [] | Fax: []
- Email: jamie.wallace@gmail.com
- URL: []
- U.S. Citizen:

Enrollments | JZ/CZ Manager | Add to Case Load

Customer Assignment

- Staff Assigned: MILLER, PAMELA | Change
- WIB Assigned: Erie County
- Agency: Boys & Girls Clubs of Buffalo Inc | Change Office
- Office: Boys & Girls Clubs of Buffalo Inc DCY
- UI Claimant: Seek (Subject to Work Search) | Work Search Record
- Registered: 04/21/2017
- 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



If a customer has an existing OSOS record, it is important to ensure all information is verified and updated each time you work with the customer.



From the **Services** window, select the **Services** tab and click the **New Service** button at the bottom of the screen. OSOS will navigate to the **Provider** module.

The screenshot shows the OSOS interface for customer Wallace, Jamie. The 'Services' tab is selected, and the 'New Service' button is highlighted in red. The interface displays service details for 'Leadership Development (Youth)' and a funding table.

Customer Information: Wallace, Jamie | SSN: ***-**-7654 | OSOS ID: NY014957117

Navigation: CUSTOMER (selected), PROVIDER, EMPLOYER, STAFF, HELP

Sub-navigation: Customer Search, Customer Detail, Comp Assess, **Services** (selected), Links, CareerZone

Service Details:

- Service Name: Leadership Development (Youth)
- Service Desc.:
- Service ID: 28064
- Service Type: Leadership Development Opportunities (Youth)
- Provider Name: Buffalo Employment and Training Center
- Location Name: BETC
- Provider ID: 20496 | Offering ID: 28717
- Plan. Start Date: 07/01/2017 | Plan. End Date: 09/23/2017
- Actual Start Date: 09/11/2017 | Actual End Date:
- Completed Successfully:
- Next Contact Date:
- Program Service Type: Youth Services
- Part Time Learn. | Distance Learn.

Funding Table:

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

Total Funding: \$ 1.00 | Add | Edit | Delete

Petition #:
 RR Event #:
 Incumbent Worker Training:

Service List Table:

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Buffalo Employment and Training Cent	Leadership Development (Youth)	09/11/2017		Youth Services
<input type="checkbox"/>	DC Regional Chamber of Commerce	FLE - CareerZone Portfolio	08/30/2017		Youth Services
<input type="checkbox"/>	DC Regional Chamber of Commerce	Job Shadow Unpaid Work Experience	08/25/2017		Youth Services
<input type="checkbox"/>	DC Regional Chamber of Commerce	Job Shadow Unpaid Work Experience	06/14/2017		Youth Services

Buttons: Options, Print List, **New Service** (highlighted), Delete Service, Authorization, IPA Service Summary, Payments, Tracking

Footer Buttons: Save, Customer Detail, Comp Assess, Comments, Check Labor Market Information

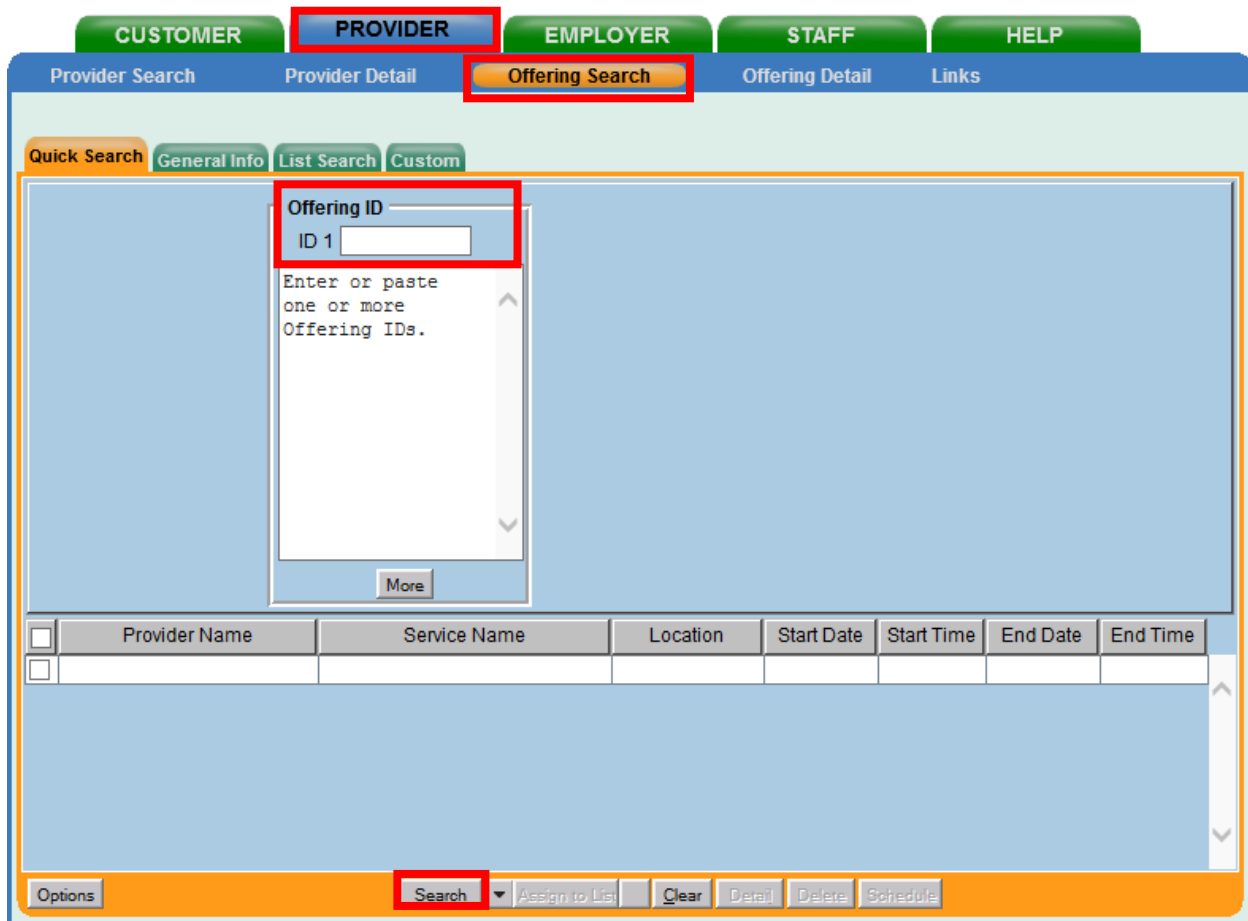
OFFERING SEARCH

All Level 2 (L2) Youth Services are created and stored in the **Provider** module.



There is designated staff in each of the Local Workforce Development Areas (LWDAs) that have permissions to create and modify provider offerings. It is important that you work with your partner who has the ability to add new offerings to ensure that there is an offering available for each of the service elements.

From the **Provider** module, navigate to the **Offering Search** window. If the Offering ID is known, enter it in the **Offering ID** field and click **Search**.



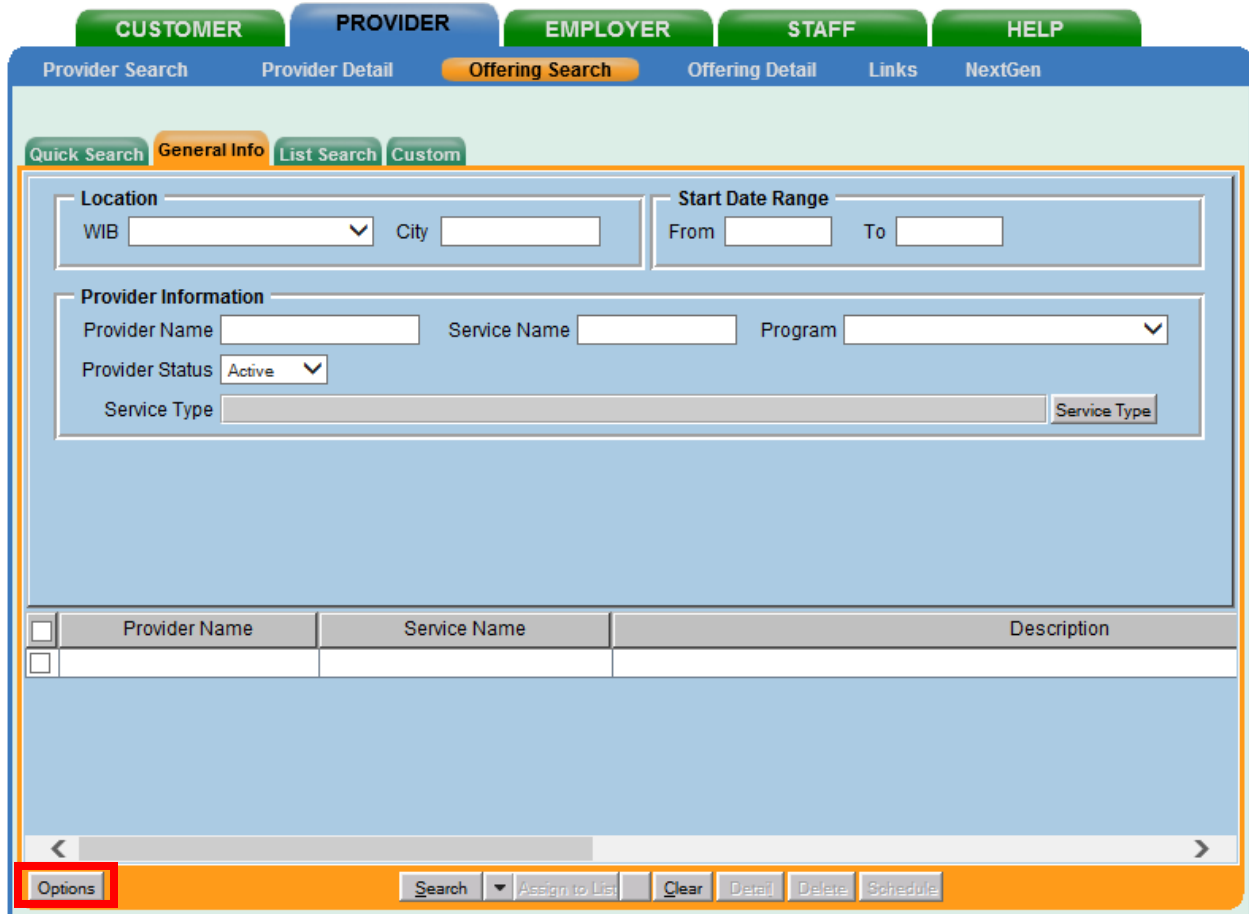
The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER (highlighted with a red box), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (highlighted with a red box), Offering Detail, and Links. The main content area has tabs for Quick Search, General Info, List Search, and Custom. A form titled 'Offering ID' is visible, with a text input field containing 'ID 1' (highlighted with a red box). Below the input field is a dropdown menu with the text 'Enter or paste one or more Offering IDs.' and a 'More' button. At the bottom of the interface, there is a toolbar with buttons: Options, Search (highlighted with a red box), Assign to List, Clear, Detail, Delete, and Schedule. Below the toolbar is a table with columns: Provider Name, Service Name, Location, Start Date, Start Time, End Date, and End Time. The table is currently empty.



As a best practice, staff working with youth customers should create a list of commonly used Offering IDs used by a given provider. This will make it easier to select the appropriate service when entering data.

If the Offering or Provider ID is unknown, the offering must be identified by searching in the Offering Search window.

Customizing search results will help ensure the appropriate service type, offering and location is associated with the service being provided. Before searching for the service, click the **Options** button to customize your search results.

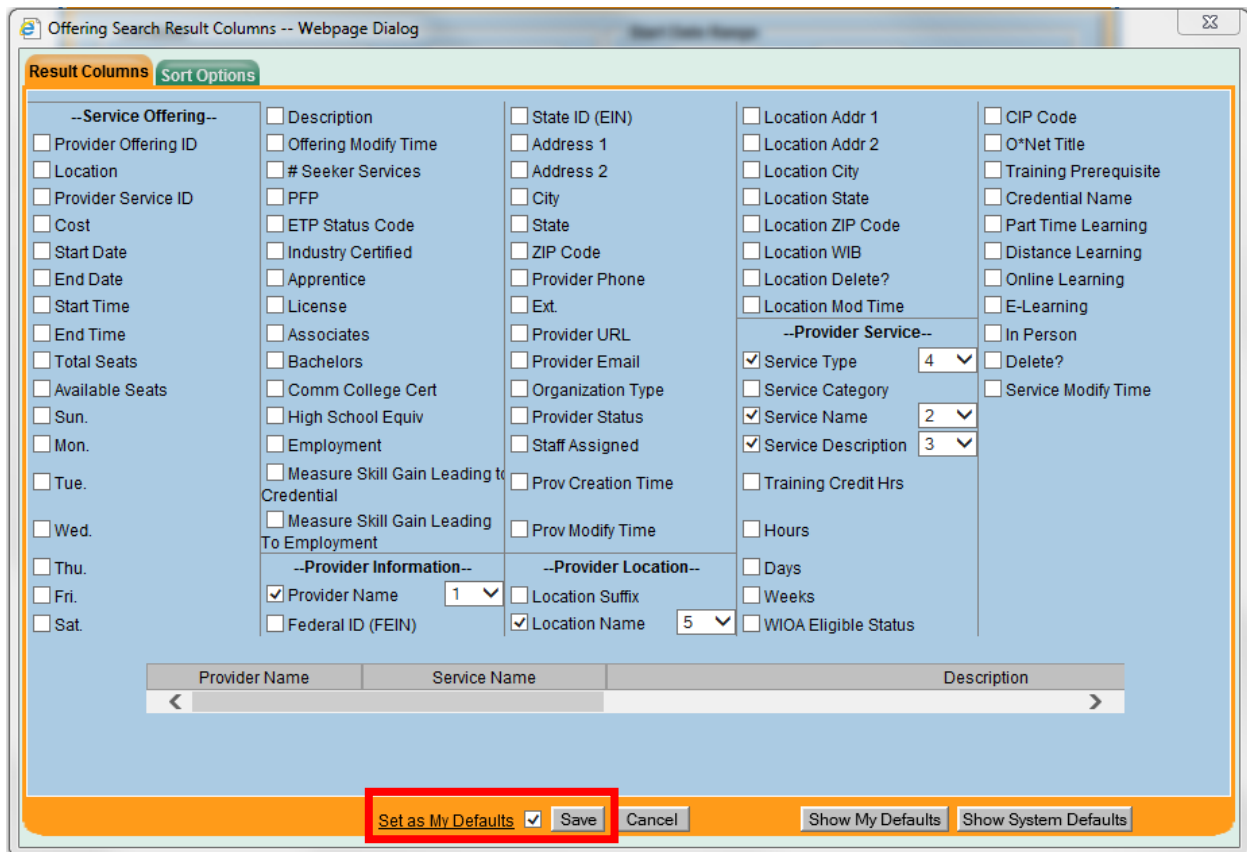


The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (selected), Offering Detail, Links, and NextGen. The main content area has sub-tabs: Quick Search, General Info (selected), List Search, and Custom. The search form includes fields for Location (WIB dropdown, City text), Start Date Range (From/To text), Provider Information (Provider Name, Service Name, Program dropdown, Provider Status dropdown, Service Type text), and a table with columns for Provider Name, Service Name, and Description. At the bottom, there is a toolbar with buttons: Options (highlighted with a red box), Search, Assign to List, Clear, Detail, Delete, and Schedule.

This opens the **Offering Search Results Columns Webpage Dialogue** box.

Select the options to display in your offering search results. Here is a suggested sequence of display options: (1) **Provider Name**, (2) **Service Name**, (3) **Service Description**, (4) **Service Type**, and (5) **Location Name**. Additional options may be selected as needed. Once you have identified and ordered the fields that you wish to display in your search results, select the **Set as My Defaults** check box.

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 Addr 1

Location Addr 2

Location City

Location State

Location ZIP Code

Location WIB

Location Delete?

Location Mod Time

--Provider Service--

Service Type 4

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



Click on the **General Info** tab to begin the provider search. In the **Location** section, select the appropriate LWDB (which is referenced in OSOS as WIB) from the dropdown. Then click the **Service Type** button.

The screenshot shows the OSOS Provider Search interface. The main navigation tabs are CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (selected), and Offering Detail. The 'Quick Search' section has three tabs: Quick Search, General Info (selected), and Custom. The 'Location' section includes a 'WIB' dropdown menu (currently showing 'Erie County'), a 'City' text input, and a 'Start Date Range' section with 'From' and 'To' text inputs. The 'Service Name' and 'Program' text inputs are also present. The 'Service Type' button is highlighted with a red box. Below the search fields is a table with the following columns: Service Name, Location, Start Date, Start Time, End Date, and End Time. The table is currently empty. At the bottom of the interface are buttons for Options, Search, Clear, Detail, Delete, Print List, and Schedule.

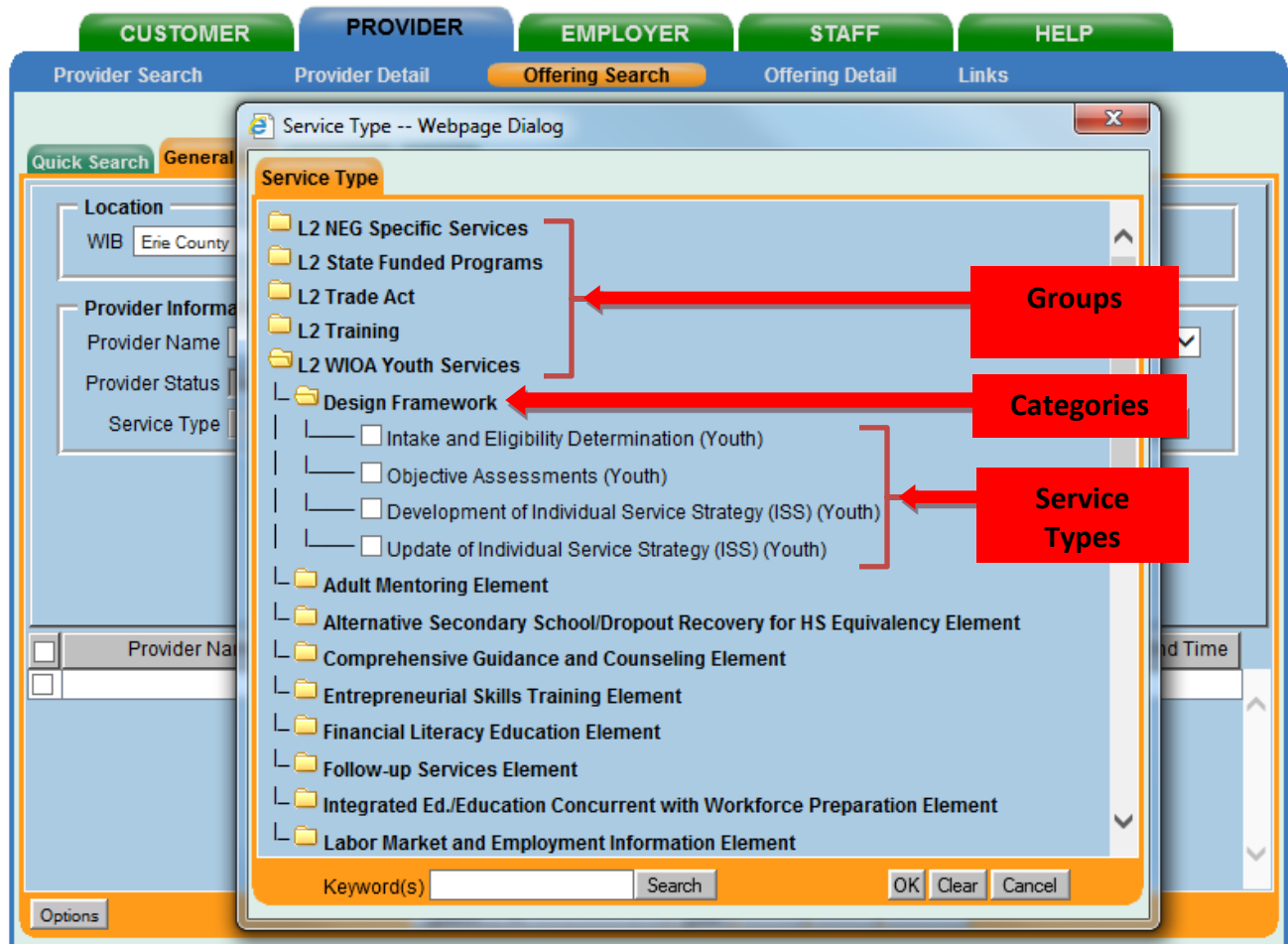
SERVICE TYPE SELECTION

Once the **Service Type** button has been selected, the **Service Type -- Webpage Dialog** box will appear. OSOS Service Types are organized into three hierarchies: Groups, Categories, and Service Types. The first set of folders are Groups. For the purpose of youth data entry, staff will select the **L2 WIOA Youth Services** group.

The second set of folders are the Categories. These Categories mirror the 14 WIOA Youth Elements with one additional Category that encompasses the Design Framework Services. Within each of the Categories are the Service Types that are selected when data entering the Program Service Type for the customer. These terms will be used throughout this guide.



Prior to attaching a Youth Element to a participant record, all youth eligibility data must be documented in OSOS. In addition, an Objective Assessment and the Development of Individual Service Strategy must be completed with the customer and the respective Service Types entered in OSOS under the Design Framework Category.



The screenshot displays the 'Service Type -- Webpage Dialog' window. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (active), Offering Detail, and Links. The main content area shows a tree view of service types. Red arrows point from labels 'Groups', 'Categories', and 'Service Types' to their respective levels in the tree. The 'Groups' level includes folders like 'L2 NEG Specific Services', 'L2 State Funded Programs', 'L2 Trade Act', 'L2 Training', and 'L2 WIOA Youth Services'. The 'Categories' level includes 'Design Framework'. The 'Service Types' level includes 'Intake and Eligibility Determination (Youth)', 'Objective Assessments (Youth)', 'Development of Individual Service Strategy (ISS) (Youth)', and 'Update of Individual Service Strategy (ISS) (Youth)'. Other categories like 'Adult Mentoring Element' and 'Alternative Secondary School/Dropout Recovery for HS Equivalency Element' are also visible. The bottom of the dialog has a 'Keyword(s)' search field and 'OK', 'Clear', and 'Cancel' buttons.



L2 WIOA YOUTH SERVICE CATEGORIES AND SERVICE TYPES

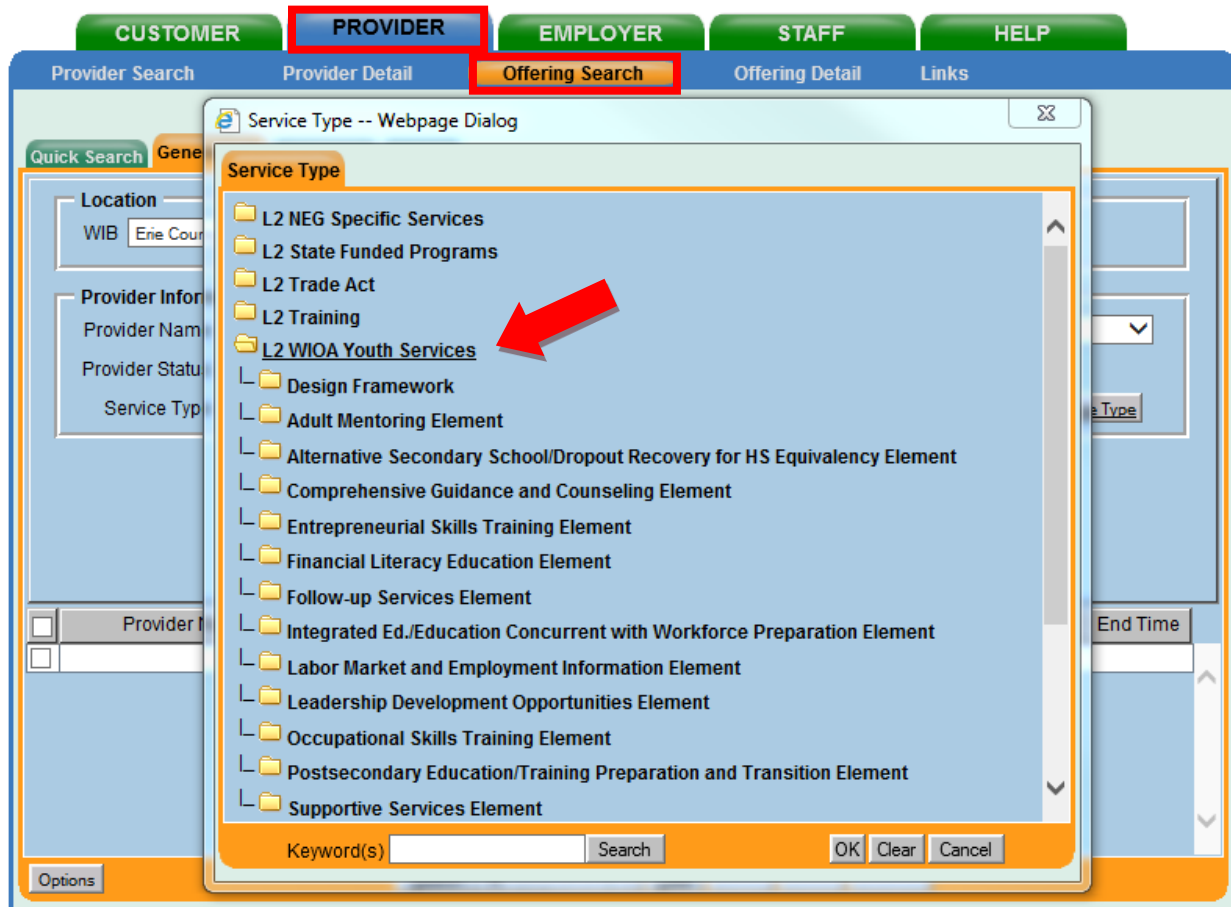
- 📁 Design Framework
 - Intake and Eligibility Determination (Youth)
 - Objective Assessments (Youth)
 - Development of Individual Service Strategy (ISS) (Youth)
 - Update of Individual Service Strategy (ISS) (Youth)
- 📁 Adult Mentoring Element
 - Adult Mentoring (Youth)
- 📁 Alternative Secondary School/Dropout Recovery for HS Equivalency Element
 - Alternative Secondary School/Dropout Recovery for HS Equivalency (Youth)
- 📁 Comprehensive Guidance and Counseling Element
 - Comprehensive Guidance and Counseling (Youth)
- 📁 Entrepreneurial Skills Training Element
 - Entrepreneurial Skills Training (Youth)
- 📁 Financial Literacy Education Element
 - Financial Literacy Education (Youth)
- 📁 Follow-up Services Element
 - Follow-up Adult Mentoring (Youth)
 - Follow-up Financial Literacy (Youth)
 - Follow-up Labor Market and Employment Information (Youth)
 - Follow-up Postsecondary Transition (Youth)
 - Follow-up Supportive Services (Youth)
 - Follow-up Non-Element (Youth)
- 📁 Integrated Ed./Education Concurrent with Workforce Preparation Element
 - Integrated Ed./Education Concurrent with Workforce Preparation (Youth)
- 📁 Labor Market and Employment Information Element
 - Labor Market and Employment Information (Youth)
- 📁 Leadership Development Opportunities Element
 - Leadership Development Opportunities (Youth)
- 📁 Occupational Skills Training Element
 - Occupational Skills Training
- 📁 Postsecondary Education/Training Preparation and Transition Element
 - Postsecondary Education/Training Preparation and Transition (Youth)
- 📁 Supportive Services Element
 - Supportive Services – Child Care (Youth)
 - Supportive Services – Dependent Care (Youth)
 - Supportive Services – Housing (Youth)
 - Supportive Services – Needs-Related Payments (Youth)
 - Supportive Services – Transportation (Youth)
 - Supportive Services – Other (Youth)
- 📁 Tutoring, Study Skills Instruction/Dropout Prevention for HS Diploma Element
 - Tutoring, Study Skills Instruction/Dropout Prevention for HS Diploma (Youth)
- 📁 Work Experience Element
 - Employment/Internships, Not Limited to Summer (Youth)
 - Job Shadowing (Youth)
 - On-the-Job Training (Youth)
 - Pre-Apprenticeship Programs (Youth)
 - Summer Employment/Internships, Summer Only (Youth)
 - Other Work Experience Type (Youth)

All WIOA Youth Program Services Types can be found by selecting the **L2 WIOA Youth Services** group, and selecting the appropriate folder.

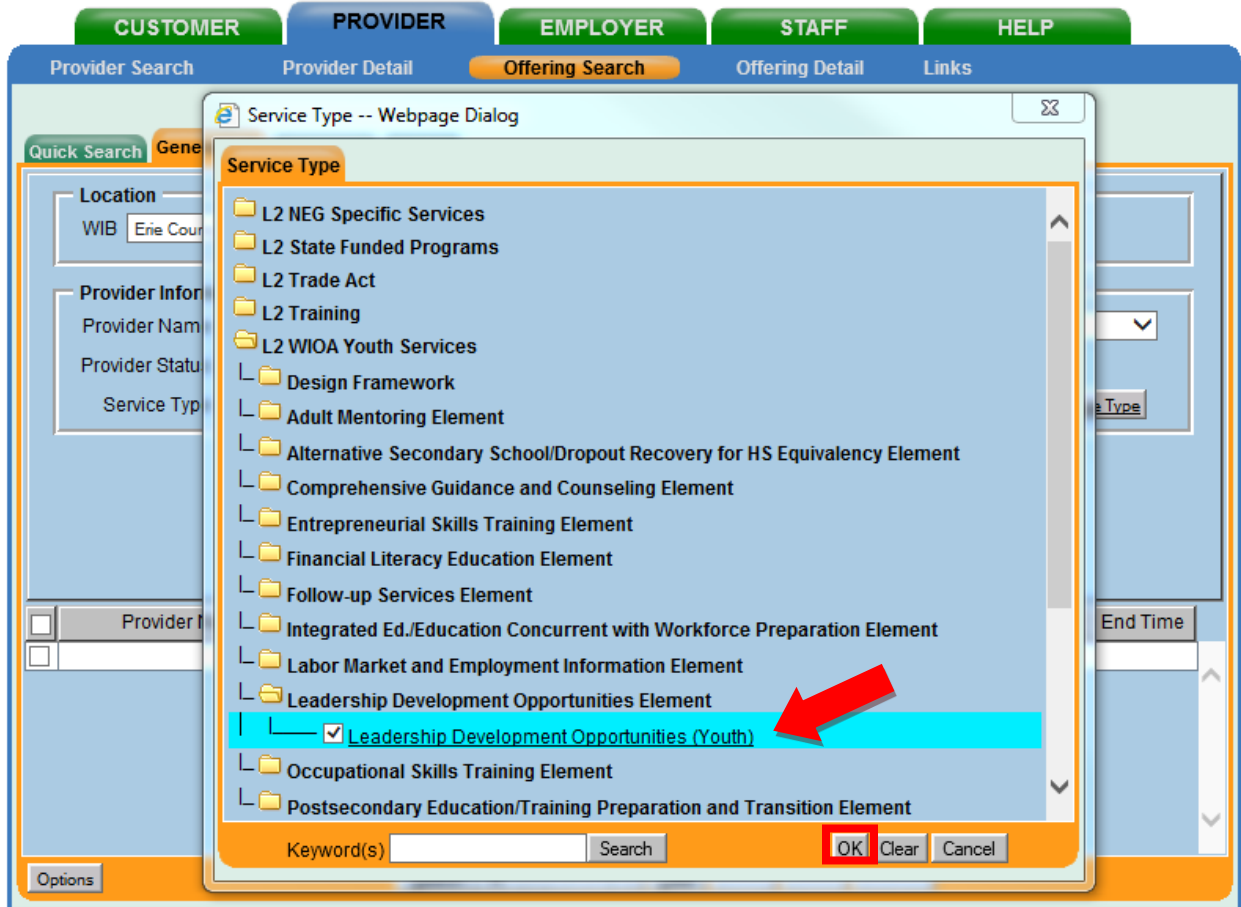


All WIOA Youth Service Types are identified by the word “Youth” in parenthesis, except Occupational Skills Training. If the word Youth is not in parenthesis, then it is not a Youth Service. This is especially important if you are searching for an applicable Service Type using the Keyword(s) search field at the bottom of the dialog box. For instance, if staff do a keyword search for Follow-up, there may be several search results. Youth providers should only select the service types that are designated with the word “Youth” at the end.

*NOTE: Occupational Skills Training will not display the word Youth in the Service Type because of the requirement that all ITA trainings must be listed on the Eligible Training Provider List (ETPL). Since the ETPL does not differentiate trainings available to youth and adults, the same service type must be used for all ETPL approved trainings.



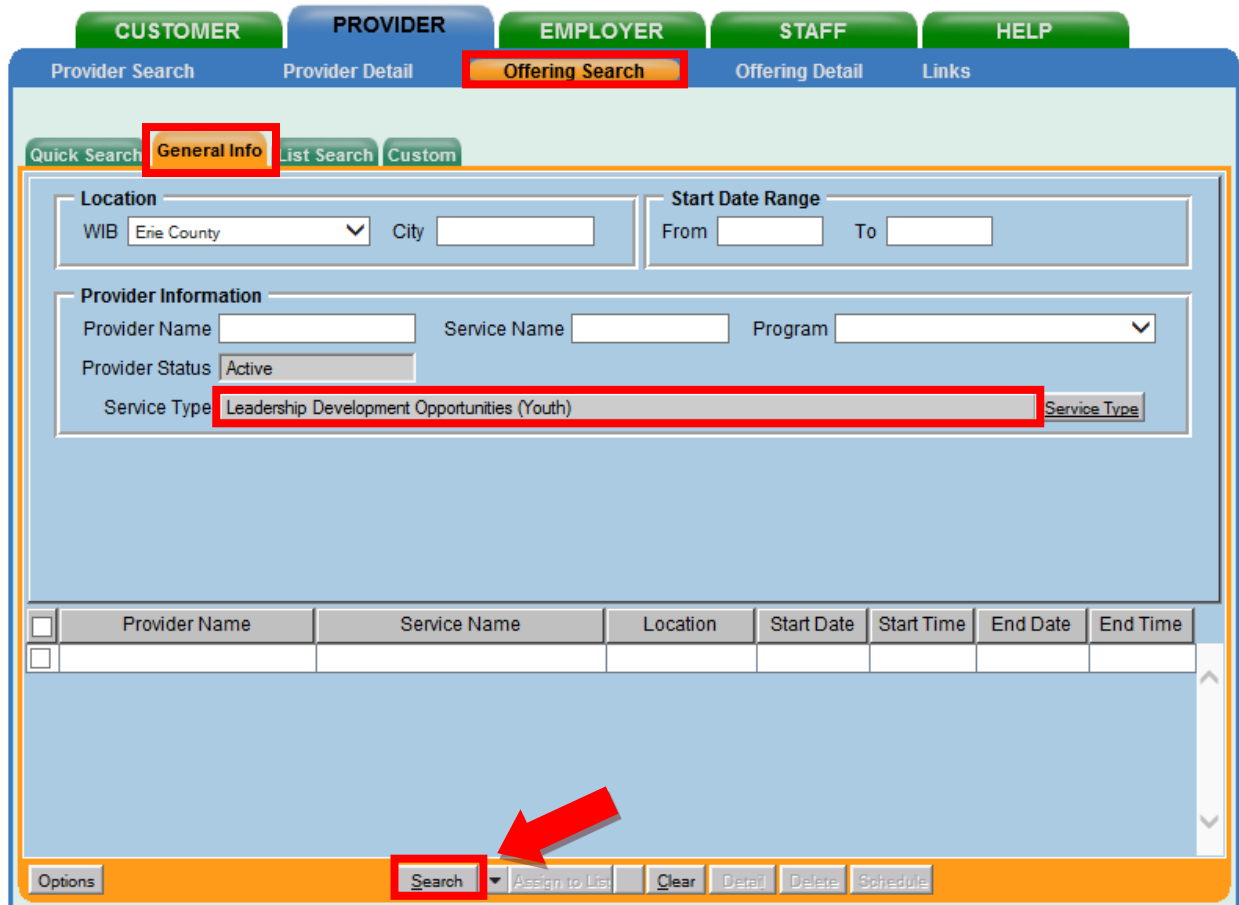
Select the appropriate Category and Service Type. Click **OK** at the bottom of the screen.



OFFERING SELECTION

When the appropriate Service Type has been selected, it will populate the **Service Type** field in the **Offering Search** window, on the **General Info** tab.

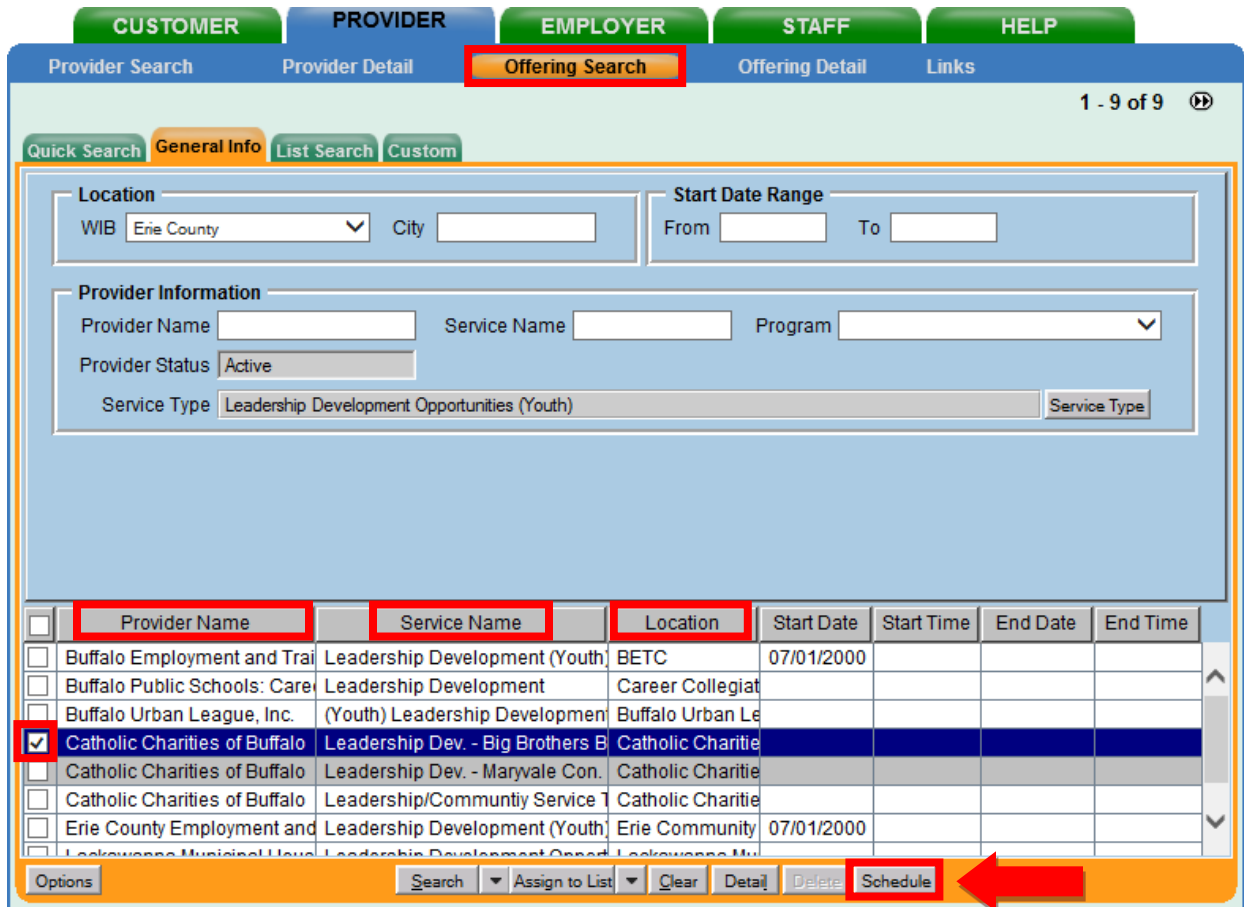
Next, click the **Search** button at the bottom of the screen to generate the list of providers.



The screenshot shows the OSOS web interface for the 'Offering Search' function. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (highlighted), Offering Detail, and Links. Under the 'Offering Search' sub-tab, there are further options: Quick Search, General Info (highlighted), List Search, and Custom. The main form area contains several input fields: 'Location' (with a dropdown set to 'WIB Erie County' and a 'City' field), 'Start Date Range' (with 'From' and 'To' fields), 'Provider Information' (with 'Provider Name', 'Service Name', and 'Program' fields), 'Provider Status' (set to 'Active'), and 'Service Type' (set to 'Leadership Development Opportunities (Youth)', which is highlighted with a red box). Below the form is a table with columns: Provider Name, Service Name, Location, Start Date, Start Time, End Date, and End Time. At the bottom of the interface, there is a row of buttons: Options, Search (highlighted with a red box and a red arrow pointing to it), Assign to List, Clear, Detail, Delete, and Schedule.

SCHEDULING AN OFFERING

After clicking the **Search** button, a list of providers will appear in the search results. Choose the appropriate provider, service name, and location for the offering. Then click **Schedule** at the bottom of the screen.



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

1 - 9 of 9

Quick Search **General Info** List Search Custom

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

Provider Information:

Provider Name: Service Name: Program: Provider Status: Active Service Type: Leadership Development Opportunities (Youth)

<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>	Buffalo Employment and Trai	Leadership Development (Youth)	BETC	07/01/2000			
<input type="checkbox"/>	Buffalo Public Schools: Care	Leadership Development	Career Collegiat				
<input type="checkbox"/>	Buffalo Urban League, Inc.	(Youth) Leadership Developmen	Buffalo Urban Le				
<input checked="" type="checkbox"/>	Catholic Charities of Buffalo	Leadership Dev. - Big Brothers B	Catholic Charitie				
<input type="checkbox"/>	Catholic Charities of Buffalo	Leadership Dev. - Maryvale Con.	Catholic Charitie				
<input type="checkbox"/>	Catholic Charities of Buffalo	Leadership/Communtiy Service T	Catholic Charitie				
<input type="checkbox"/>	Erie County Employment and	Leadership Development (Youth)	Erie Community	07/01/2000			
<input type="checkbox"/>	Lockport Municipal Hea	Leadership Development Opport	Lockport Municipal				

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



DATES AND PROGRAM SERVICE TYPES

Once the service has been scheduled, it will be attached to the youth record. Details of the service must now be entered. This is done within the **Customer** module, under the **Services** window, on the **Services** tab. The Provider Name, Location Name, Provider ID and Offering ID will populate in the **Detail** section.

The screenshot shows the OSOS Customer Services window for a customer named Wallace, Jamie. The window is divided into several sections:

- Customer Information:** Wallace, Jamie; SSN: ***-**-7654; OSOS ID: NY014957117
- Navigation:** Agency Info, Achievement Objectives, **Services**, Service History, Enrollments, Outcomes, Empl. Outcomes, Trng. Outcom
- Detail Section:**
 - Service Name: Leadership Dev. - Big Brothers Big Siste
 - Service Desc.:
 - Service ID: 114503
 - Service Type: Leadership Development Opportunities (Youth)
 - Provider Name: Catholic Charities of Buffalo
 - Location Name: Catholic Charities - Buffalo
 - Provider ID: 20554; Offering ID: 119610
 - Plan. Start Date: [] Plan. End Date: []
 - Actual Start Date: [] Actual End Date: []
 - Completed Successfully: [v]
 - Next Contact Date: []
 - Program Service Type: [v]
 - Part Time Learn. [] Distance Learn. []
- Funding Section:**
 - Table with columns: Level, Source, Obligated, Actual, Oblig #
 - Total Funding: [] Add Edit Delete
 - Petition #: []
 - RR Event #: [v]
 - Incumbent Worker Training: [v]
- Service List Table:**

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	DC Regional Chamber of Commerce	Job Shadow Unpaid Work Experience	06/14/2017		Youth Services
<input type="checkbox"/>	SS/IO Provider	SS/IO Provider Service	06/07/2017	06/07/2017	Basic Career Services
<input type="checkbox"/>	Hudson Valley Community College	AAS-Computer Information Systems	04/21/2017		Youth Services
<input checked="" type="checkbox"/>	Catholic Charities of Buffalo	Leadership Dev. - Big Brothers Big Sis			
- Buttons:** Options, Print List, New Service, Delete Service, Authorization, IPA Service Summary, Payments, Tracking, Save, Customer Detail, Comp Assess, Comments, Check Labor Market Information

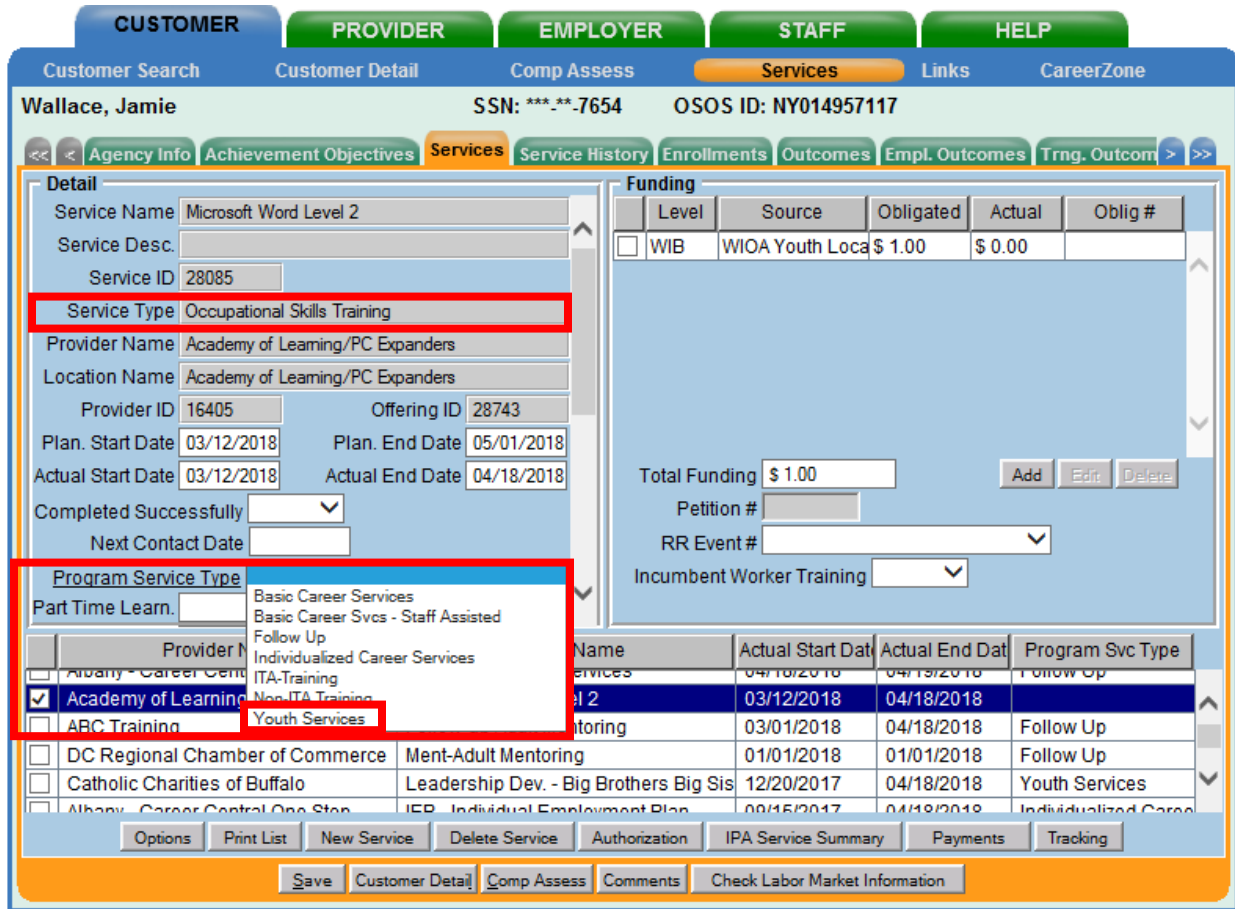
The following information is required and must be entered in the **Detail** section:

- Planned Start Date – Anticipated date the Youth Service is expected to start.
- Planned End Date – Anticipated date the Youth Service is expected to end.
- Actual Start Date – Date the Youth Service begins. NOTE: A service cannot be funded prior to the Actual Start Date.
- Next Contact Date (not required, but recommended) – Entering a date in this field will generate a reminder that will be sent to the Inbox in the **Staff** module of OSOS for any service details that require additional attention.
- Program Service Type – All WIOA Youth Services, with the exception of Follow-Up, must be entered as Youth Services.



Entering an Actual End Date on an offering will end the service. Entering an Actual End Date on the last open service of an enrollment will start the 90-day exit process.

Highlighted in the screenshot below, you can see that Occupational Skills Training has been selected as the Service Type and Youth Services was selected as the Program Service Type. Staff must always select Youth Services for the Program Service Type unless they are entering Follow-up Services.



Customer: Wallace, Jamie | **SSN:** ***-**-7654 | **OSOS ID:** NY014957117

Service Details:

- Service Name: Microsoft Word Level 2
- Service ID: 28085
- Service Type: Occupational Skills Training**
- Provider Name: Academy of Learning/PC Expanders
- Location Name: Academy of Learning/PC Expanders
- Provider ID: 16405 | Offering ID: 28743
- Plan. Start Date: 03/12/2018 | Plan. End Date: 05/01/2018
- Actual Start Date: 03/12/2018 | Actual End Date: 04/18/2018

Funding:

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

Total Funding: \$ 1.00

Program Service Type:

- Youth Services

Service History Table:

Name	Actual Start Date	Actual End Date	Program Svc Type
Microsoft Word Level 2	03/12/2018	04/18/2018	Youth Services
Follow Up			Follow Up
Ment-Adult Mentoring	01/01/2018	01/01/2018	Follow Up
Leadership Dev. - Big Brothers Big Sis	12/20/2017	04/18/2018	Youth Services
Individualized Career	04/18/2018		Individualized Career



INDIVIDUAL TRAINING ACCOUNT (ITA) EXCEPTION

NOTE: Occupational Skills Trainings or Youth ITAs can only be provided to Out-of-School Youth (OSY).

To enter an Occupational Skills Training Service through a Youth Program funded ITA, select the **Occupational Skills Training** service type as described in the [Service Type Selection section](#). Then, select **Youth Services** in the **Program Service Type** drop-down and **Youth ITA Waiver** in the **Program** drop-down as shown in the screenshot below. This is the only way to enter a Youth ITA, fund the training with WIOA Youth funds, and ensure that it is reported correctly.

The screenshot shows the OSOS system interface for customer Wallace, Jamie. The 'Services' tab is active, and the 'Program Service Type' is set to 'Youth Services'. The 'Program' dropdown menu is open, showing a list of options, with 'Youth ITA Waiver' selected. The 'Funding' table shows a list of funding sources with columns for Level, Source, Obligated, Actual, and Oblig #.

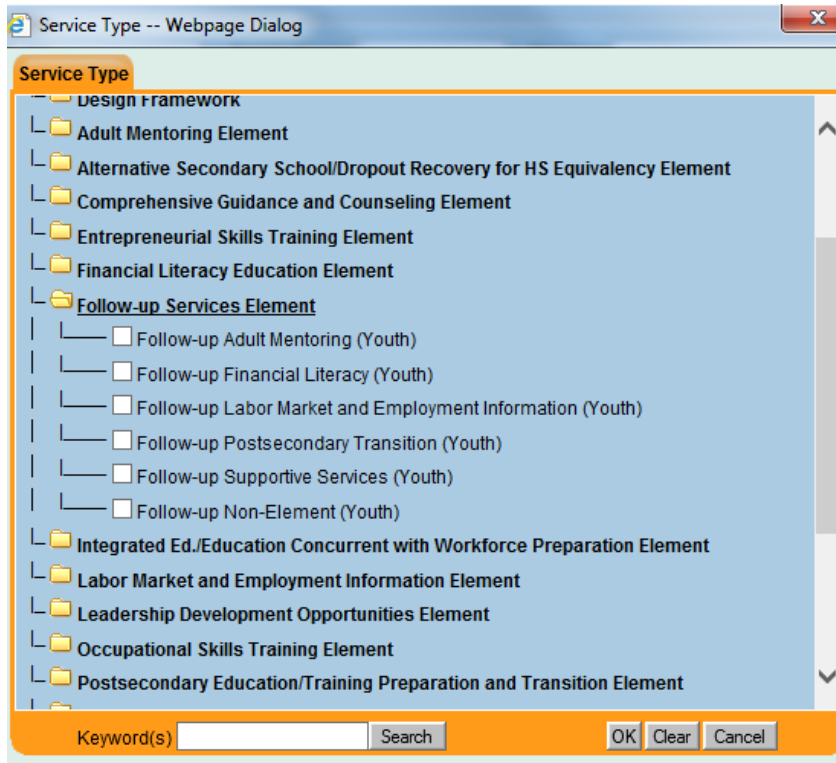
Level	Source	Obligated	Actual	Oblig #

Actual Start Date	Actual End Date	Program Svc Type
06/14/2017		Youth Services
06/07/2017	06/07/2017	Basic Career Services
04/21/2017		Youth Services

FOLLOW-UP EXCEPTION

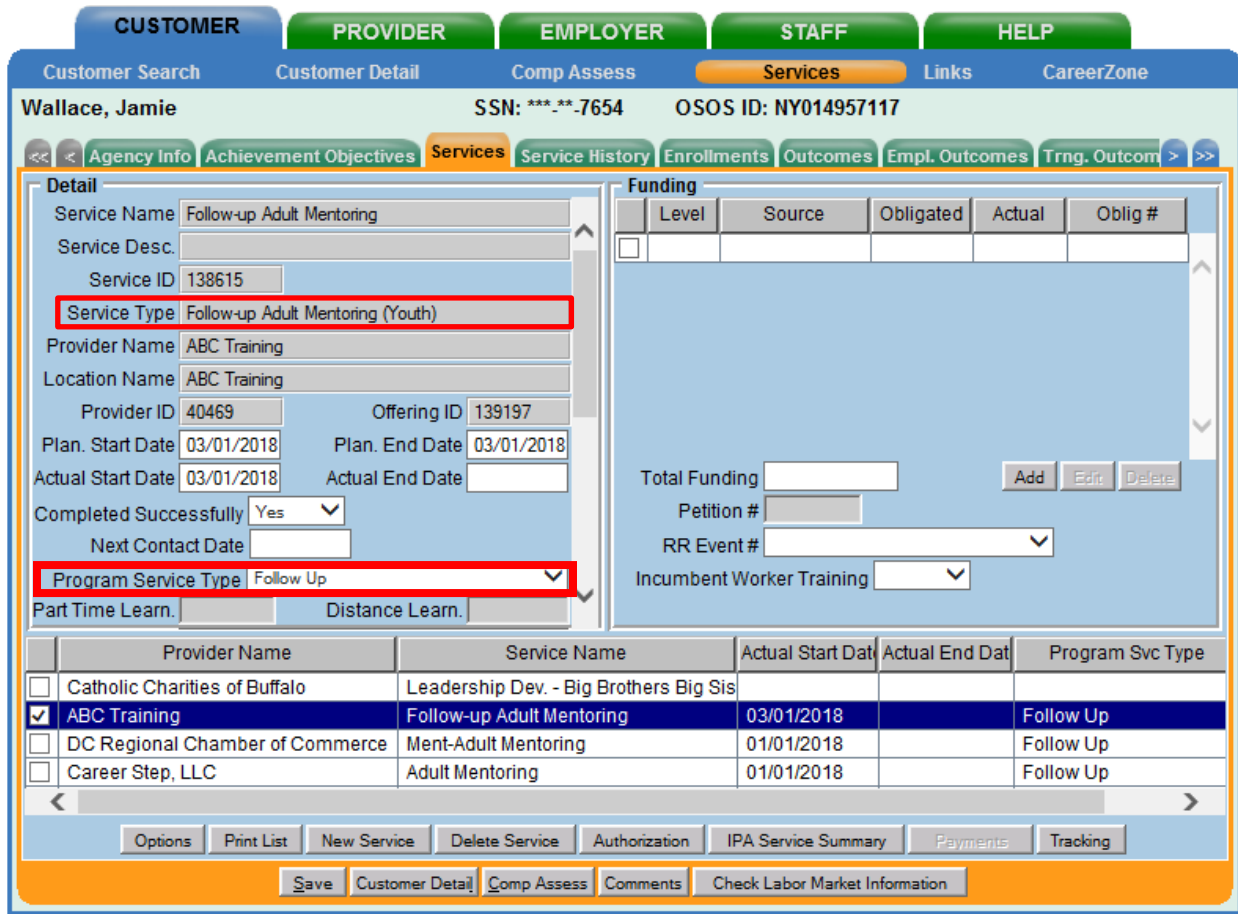
Staff are required to provide Follow-up Services to youth for a minimum of one year after the last service is provided. Under WIOA, there are five allowable service elements that can be provided to youth as Follow-up Services.

In the **Follow-Up Services Element** folder, the five allowable Follow-up Service Types are listed. In addition, the ‘Follow-up Non-Element (Youth)’ service type is listed and should be recorded when a concrete Follow-up Service outside of the five allowable elements was provided. Contacting the youth’s school counselor to check-in and discuss the youth's progress is an example of when staff should select the “Follow-up Non-Element (Youth).” This service type should not be selected when there was no concrete service provided. For instance, contacting the youth to update address information would not be the appropriate use of the “Follow-up Non-Element (Youth)” service type.



To attach a Follow-up Service, first select the **Follow-up Services Element** folder, and then select the Follow-up Service Type that most accurately reflects the Follow-up Service that was provided to the youth.

Select **Follow Up** from the **Program Service Type** drop-down. This is selected because providing Follow-up Services should not create or extend an enrollment.



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

Wallace, Jamie SSN: ***-**-7654 OSOS ID: NY014957117

Agency Info Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcom

Detail

Service Name: Follow-up Adult Mentoring
 Service Desc.:
 Service ID: 138615
 Service Type: Follow-up Adult Mentoring (Youth)
 Provider Name: ABC Training
 Location Name: ABC Training
 Provider ID: 40469 Offering ID: 139197
 Plan. Start Date: 03/01/2018 Plan. End Date: 03/01/2018
 Actual Start Date: 03/01/2018 Actual End Date:
 Completed Successfully: Yes
 Next Contact Date:
 Program Service Type: Follow Up
 Part Time Learn. Distance Learn.

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"/> Catholic Charities of Buffalo	Leadership Dev. - Big Brothers Big Sis			
<input checked="" type="checkbox"/> ABC Training	Follow-up Adult Mentoring	03/01/2018		Follow Up
<input type="checkbox"/> DC Regional Chamber of Commerce	Ment-Adult Mentoring	01/01/2018		Follow Up
<input type="checkbox"/> Career Step, LLC	Adult Mentoring	01/01/2018		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



Do not select Youth Services as the Program Service Type to record a Follow-up Service.



ACHIEVEMENT OBJECTIVE

All Youth Services are required to have an associated Achievement Objective which must be created prior to entering the service. Select the appropriate **Achievement Objective** from the drop-down. Click **Save**.

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

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

Wallace, Jamie SSN: ***-**-7654 OSOS ID: NY014957117

<< < Agency Info **Achievement Objectives** Services Service History Enrollments Outcomes Empl. Outcomes Trng. Outcom >>

Detail

Completed Successfully Yes No

Next Contact Date 10/25/2017

Program Service Type Youth Services

Part Time Learn. Distance Learn.

Program

Minimum Hours Number of Weeks

O*Net O*Net

NAICS NAICS

Min. Prog. Agree

Achv. Objective Obtain work, gain experience in Electrical field
To increase math and reading skills

Staff Assigned

WIB Assigned NYSDOL - CO

Agency Department of Labor

Funding

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

Total Funding \$ 1.00 Add Edit Delete

Petition #

RR Event #

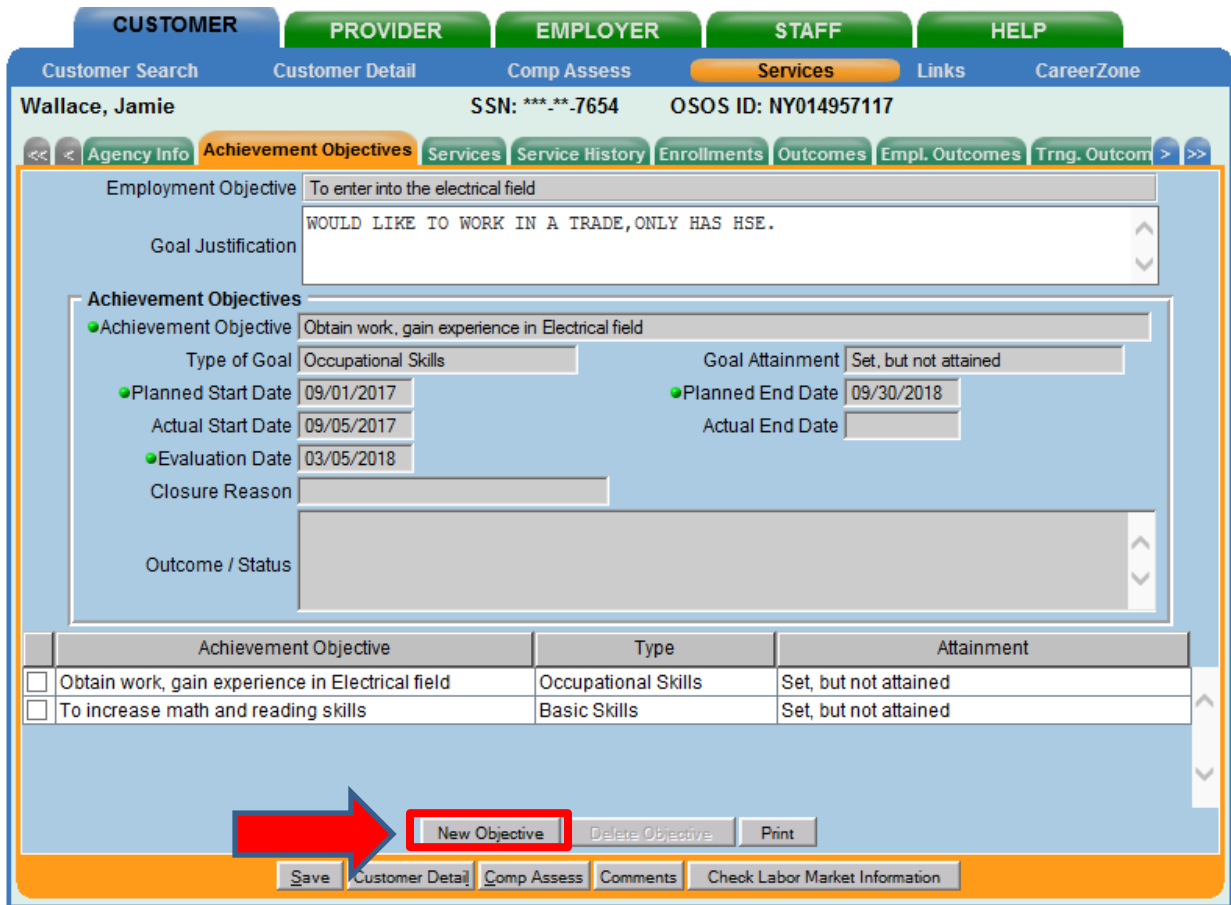
Incumbent Worker Training

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Buffalo Employment and Training Cent	Leadership Development (Youth)	09/11/2017		Youth Services
<input checked="" type="checkbox"/>	Catholic Charities of Buffalo	Leadership Dev. - Big Brothers Big Sis	09/05/2017	09/10/2017	Youth Services
<input type="checkbox"/>	DC Regional Chamber of Commerce	FLE - CareerZone Portfolio	08/30/2017		Youth Services
<input type="checkbox"/>	DC Regional Chamber of Commerce	Job Shadow Unpaid Work Experience	08/25/2017		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

If the appropriate Achievement Objective is not available from the drop-down selection, it must be created prior to saving the service. This is done from the **Services** window, under the **Achievement Objectives** tab. Begin by clicking on **New Objective**.



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

Wallace, Jamie SSN: ***-**-7654 OSOS ID: NY014957117

Agency Info **Achievement Objectives** Services Service History Enrollments Outcomes Empl. Outcomes Trng. Outcom

Employment Objective: To enter into the electrical field

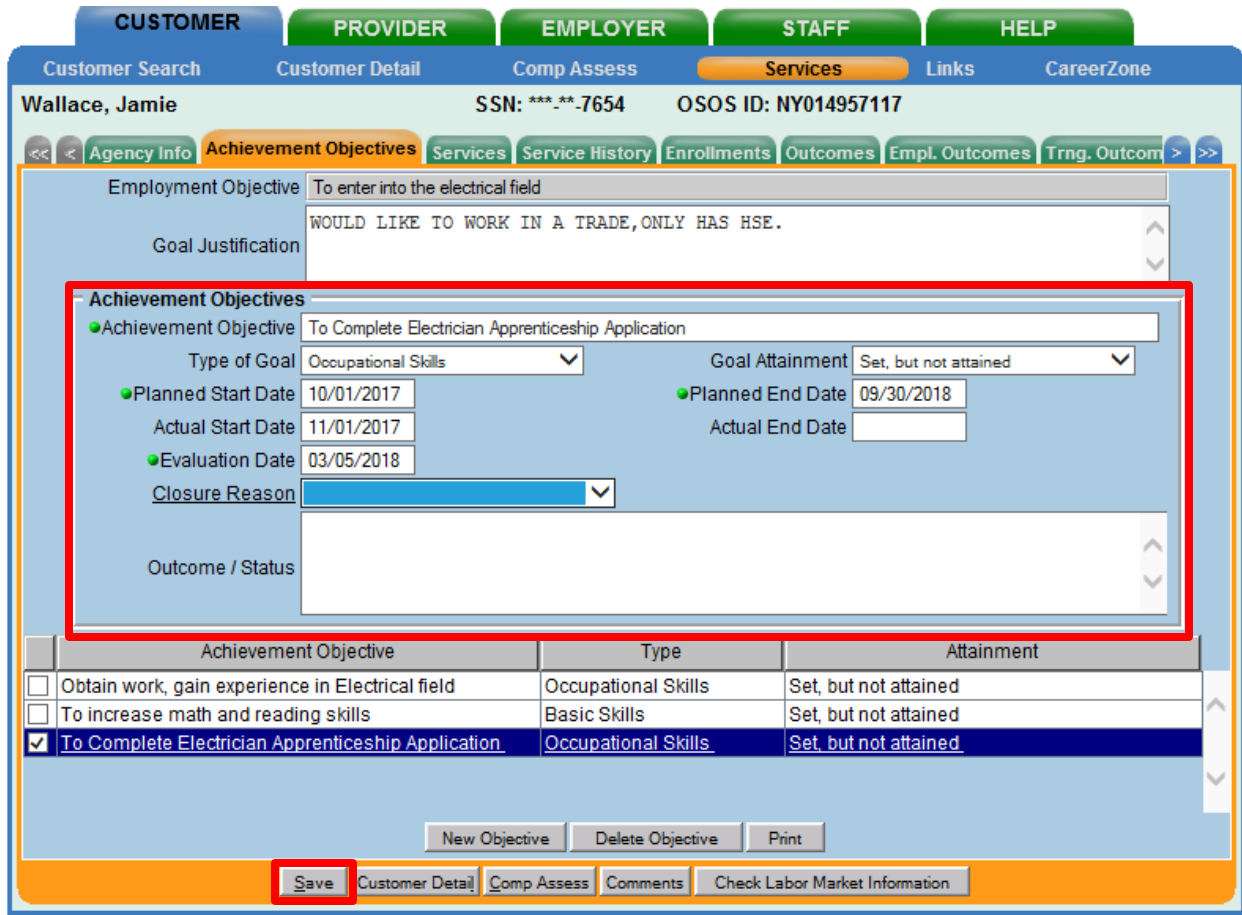
Goal Justification: WOULD LIKE TO WORK IN A TRADE, ONLY HAS HSE.

Achievement Objectives

- Achievement Objective: Obtain work, gain experience in Electrical field
 - Type of Goal: Occupational Skills Goal Attainment: Set, but not attained
 - Planned Start Date: 09/01/2017 Planned End Date: 09/30/2018
 - Actual Start Date: 09/05/2017 Actual End Date:
 - Evaluation Date: 03/05/2018
 - Closure Reason:
 - Outcome / Status:

Achievement Objective	Type	Attainment
<input type="checkbox"/> Obtain work, gain experience in Electrical field	Occupational Skills	Set, but not attained
<input type="checkbox"/> To increase math and reading skills	Basic Skills	Set, but not attained

In the **Achievement Objectives** section, enter the Achievement Objective, Planned Start Date, Planned End Date and Evaluation Date. Click **Save**. This Achievement Objective will now be available from the drop-down menu when entering Service Details on the **Services** tab.



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

Wallace, Jamie SSN: ***-**-7654 OSOS ID: NY014957117

Agency Info **Achievement Objectives** Services Service History Enrollments Outcomes Empl. Outcomes Trng. Outcom

Employment Objective To enter into the electrical field

Goal Justification WOULD LIKE TO WORK IN A TRADE, ONLY HAS HSE.

Achievement Objectives

● Achievement Objective To Complete Electrician Apprenticeship Application

Type of Goal Occupational Skills Goal Attainment Set, but not attained

● Planned Start Date 10/01/2017 ● Planned End Date 09/30/2018

Actual Start Date 11/01/2017 Actual End Date

● Evaluation Date 03/05/2018

Closure Reason

Outcome / Status

	Achievement Objective	Type	Attainment
<input type="checkbox"/>	Obtain work, gain experience in Electrical field	Occupational Skills	Set, but not attained
<input type="checkbox"/>	To increase math and reading skills	Basic Skills	Set, but not attained
<input checked="" type="checkbox"/>	To Complete Electrician Apprenticeship Application	Occupational Skills	Set, but not attained

New Objective Delete Objective Print

Save Customer Detail Comp Assess Comments Check Labor Market Information



As a best practice, staff working with a youth should record goals established on the Individual Services Strategy (ISS) as Achievement Objectives. The Print button at the bottom of the screen allows staff to print all the Achievement Objectives so that the youth can be provided with a copy to keep. Also, the occupational and academic components of a work experiences can be recorded as Achievement Objectives.



FUNDING A SERVICE

After the required service details have been saved, funding for the service must be entered in the **Funding** section of the **Services** tab. WIOA-funded services are entered differently than services that are not funded by WIOA.

If the service will be funded through WIOA, enter 1 in the **Total Funding** field.

If the service will not be funded through WIOA, enter 0 in the **Total Funding** field.

Click **Add**. This will open the **Funding -- Webpage Dialog** box.

The screenshot shows the OSOS interface for a service. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with options like Customer Search, Customer Detail, Comp Assess, Services (highlighted), Links, and CareerZone. The main header displays customer information: Wallace, Jamie; SSN: ***-**-7654; OSOS ID: NY014957117. The Services tab is active, showing a list of tabs: Agency Info, Achievement Objectives, Services (highlighted), Service History, Enrollments, Outcomes, Empl. Outcomes, and Trng. Outcom. The main content area is divided into two sections: Detail and Funding. The Detail section contains fields for Service Name (Leadership Dev. - Big Brothers Big Siste), Service Desc., Service ID (114503), Service Type (Leadership Development Opportunities (Youth)), Provider Name (Catholic Charities of Buffalo), Location Name (Catholic Charities - Buffalo), Provider ID (20554), Offering ID (119610), Plan. Start Date (09/01/2017), Plan. End Date (10/01/2018), Actual Start Date (09/05/2017), Actual End Date, Completed Successfully (dropdown), Next Contact Date, Program Service Type (Youth Services), Part Time Learn., and Distance Learn. The Funding section contains a table with columns Level, Source, Obligated, Actual, and Oblig #. Below the table is a Total Funding field set to \$1.00, with an Add button highlighted in red. Other fields include Petition #, RR Event #, and Incumbent Worker Training. At the bottom, there is a table listing services provided by various providers, with the selected service highlighted in blue. The table has columns for Provider Name, Service Name, Actual Start Date, Actual End Date, and Program Svc Type. Below the table are buttons for Options, Print List, New Service, Delete Service, Authorization, IPA Service Summary, Payments, and Tracking. At the very bottom, there are buttons for Save, Customer Detail, Comp Assess, Comments, and Check Labor Market Information.

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

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/> DC Regional Chamber of Commerce	Job Shadow Unpaid Work Experience	06/14/2017		Youth Services
<input type="checkbox"/> SS/IO Provider	SS/IO Provider Service	06/07/2017	06/07/2017	Basic Career Services
<input type="checkbox"/> Hudson Valley Community College	AAS-Computer Information Systems	04/21/2017		Youth Services
<input checked="" type="checkbox"/> Catholic Charities of Buffalo	Leadership Dev. - Big Brothers Big Sis	09/05/2017		Youth Services



From the list of available Funding Sources, select **WIOA Youth Local** with the appropriate Program Year.

If the service is funded through WIOA, enter 1 in the **Obligated Amount** field.

If the service is not funded through WIOA, enter 0 in the **Obligated Amount** field.

The **Obligated Percentage** will auto fill. Click **OK**.

The screenshot shows the OSOS web application interface. The 'Funding' dialog box is open, displaying a table of funding sources. The table has columns for Level, Funding Source, Year, Remaining, and NEG/Contract/Grant #. The row for 'WIOA Youth Local' for the year 2017 is selected and highlighted in red. Below the table, there are input fields for 'Obligated Amount' (set to \$ 1.00), 'Obligated Percentage' (set to 100), and dropdown menus for 'WIB' (Erie County), 'Office' (BUFFALO - 0710), and 'Region' (Western New York). The 'OK' button is highlighted in red.

Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	WIB WIOA Adult Local	2015	\$ 85075.00	
<input type="checkbox"/>	WIB WIOA Adult Local	2016	\$ 95483.00	
<input type="checkbox"/>	WIB WIOA Adult Local	2017	\$ 99999.00	
<input type="checkbox"/>	WIB WIOA Dislocated Worker Local	2015	\$ 282.00	
<input type="checkbox"/>	WIB WIOA Dislocated Worker Local	2016	\$ 93557.00	
<input type="checkbox"/>	WIB WIOA Dislocated Worker Local	2017	\$ 99999.00	
<input type="checkbox"/>	WIB WIOA Youth Local	2015	\$ 8470.00	
<input type="checkbox"/>	WIB WIOA Youth Local	2016	\$ 99287.00	
<input checked="" type="checkbox"/>	WIB WIOA Youth Local	2017	\$ 99996.00	
<input type="checkbox"/>	WIB Youth Statewide 15%	2015	\$ 9992.00	
<input type="checkbox"/>	WIB Youth Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	WIB Dislocated Worker Statewide 15%	2015	\$ 9998.00	
<input type="checkbox"/>	WIB Dislocated Worker Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	WIB Adult Statewide 15%	2015	\$ 10000.00	
<input type="checkbox"/>	WIB Adult Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	State WIRED	2015	\$ 9998.00	WR12
<input type="checkbox"/>	State Workforce Learning Link	2017	\$ 99998.00	1013

Obligated Amount: \$ 1.00
 OR
 Obligated Percentage: 100

WIB: Erie County
 Office: BUFFALO - 0710
 Region: Western New York

OK Cancel



Review service details to ensure proper data entry and click **Save** when complete.

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

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

Wallace, Jamie SSN: ***-**-7654 OSOS ID: NY014957117

<< < Agency Info Achievement Objectives **Services** Service History Enrollments Outcomes Empl. Outcomes Trng. Outcom > >>

Detail

Service Name: Leadership Dev. - Big Brothers Big Siste

Service Desc.:

Service ID: 114503

Service Type: Leadership Development Opportunities (Youth)

Provider Name: Catholic Charities of Buffalo

Location Name: Catholic Charities - Buffalo

Provider ID: 20554 Offering ID: 119610

Plan. Start Date: 09/01/2017 Plan. End Date: 10/01/2018

Actual Start Date: 09/05/2017 Actual End Date:

Completed Successfully:

Next Contact Date:

Program Service Type: Youth Services

Part Time Learn. Distance Learn.

Funding

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

Total Funding: \$ 1.00 Add Edit Delete

Petition #:

RR Event #:

Incumbent Worker Training:

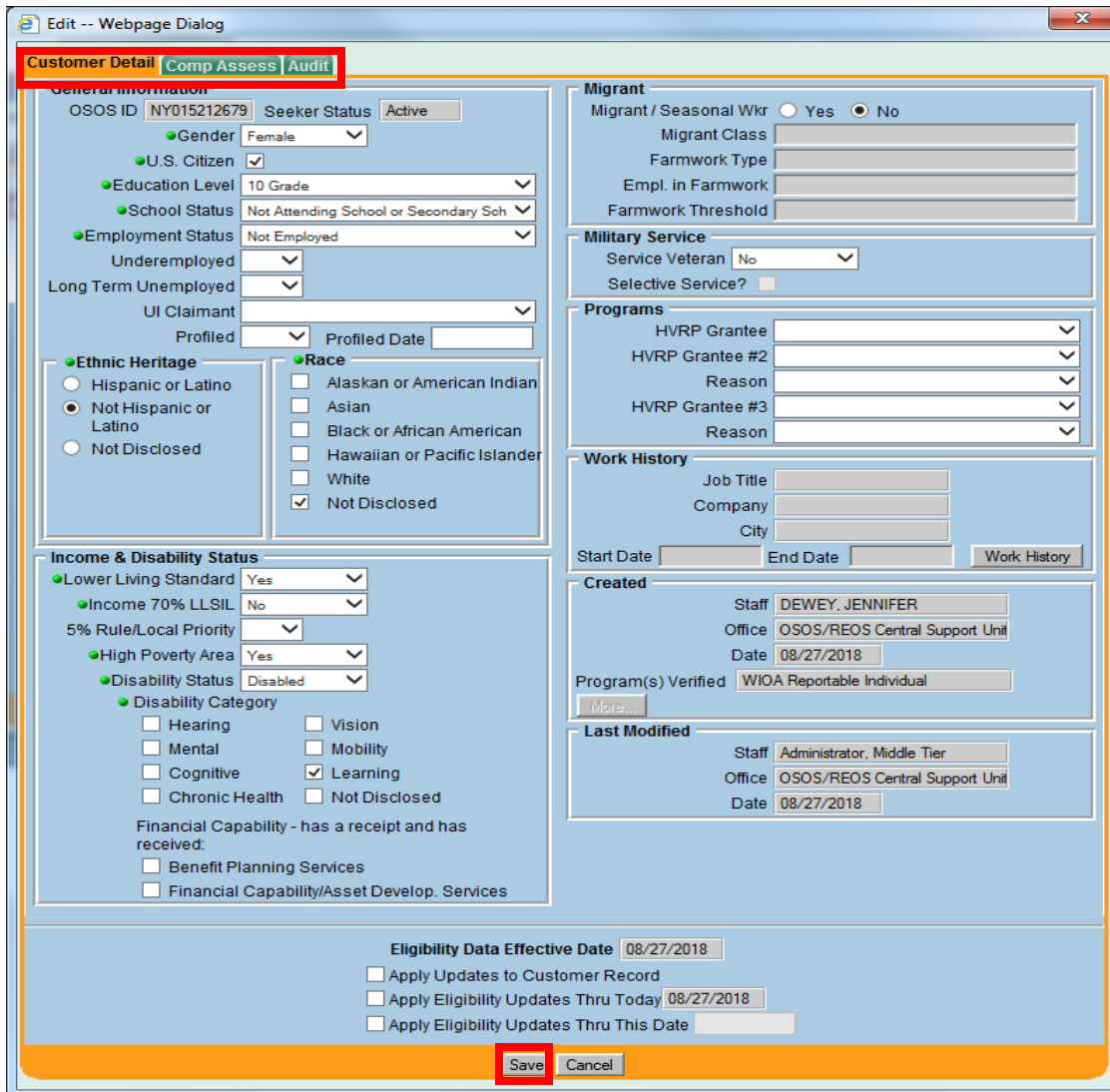
	Provider Name	Service Name	Actual Start Dat	Actual End Dat	Program Svc Type
<input type="checkbox"/>	DC Regional Chamber of Commerce	Job Shadow Unpaid Work Experience	06/14/2017		Youth Services
<input type="checkbox"/>	SS/IO Provider	SS/IO Provider Service	06/07/2017	06/07/2017	Basic Career Services
<input type="checkbox"/>	Hudson Valley Community College	AAS-Computer Information Systems	04/21/2017		Youth Services
<input checked="" type="checkbox"/>	Catholic Charities of Buffalo	Leadership Dev. - Big Brothers Big Sis	09/05/2017		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

ENROLLMENT VERIFICATION

If the entry of the service generates a new enrollment, the **Verification -- Webpage Dialog** box will appear. Review the information on the **Customer Detail** and **Comp Assess** tabs. Verify all data and enter information as required. Then, click **Save** at the bottom of the screen.



Customer Detail | **Comp Assess** | **Audit**

General Information

OSOS ID: NY015212679 | Seeker Status: Active

Gender: Female | U.S. Citizen: | Education Level: 10 Grade | School Status: Not Attending School or Secondary Sch | Employment Status: Not Employed | Underemployed: | Long Term Unemployed: | UI Claimant: | Profiled: | Profiled Date:

Ethnic Heritage

Hispanic or Latino | Not Hispanic or Latino | Not Disclosed

Race

Alaskan or American Indian | Asian | Black or African American | Hawaiian or Pacific Islander | White | Not Disclosed

Income & Disability Status

Lower Living Standard: Yes | Income 70% LLSIL: No | 5% Rule/Local Priority: | High Poverty Area: Yes | Disability Status: Disabled | Disability Category: Hearing | Vision | Mental | Mobility | Cognitive | Learning | Chronic Health | Not Disclosed

Financial Capability - has a receipt and has received:
 Benefit Planning Services | Financial Capability/Asset Develop. Services

Migrant

Migrant / Seasonal Wkr: Yes | No | Migrant Class: | Farmwork Type: | Empl. in Farmwork: | Farmwork Threshold:

Military Service

Service Veteran: No | Selective Service?:

Programs

HVRP Grantee: | HVRP Grantee #2: | Reason: | HVRP Grantee #3: | Reason:

Work History

Job Title: | Company: | City: | Start Date: | End Date: |

Created

Staff: DEWEY, JENNIFER | Office: OSOS/REOS Central Support Unit | Date: 08/27/2018 | Program(s) Verified: WIOA Reportable Individual |

Last Modified

Staff: Administrator, Middle Tier | Office: OSOS/REOS Central Support Unit | Date: 08/27/2018

Eligibility Data Effective Date 08/27/2018

Apply Updates to Customer Record | Apply Eligibility Updates Thru Today 08/27/2018 | Apply Eligibility Updates Thru This Date



*Adding or correcting information in the **Verification -- Webpage Dialog** box will update the **Customer Detail** and **Comprehensive Assessment** windows. Make sure to record all known barriers at the time of eligibility. This will ensure an accurate OSOS record for the youth and assist staff with appropriate service delivery. It will also provide an accurate snapshot of barriers faced by the local area's target populations to appropriately adjust performance goals.*



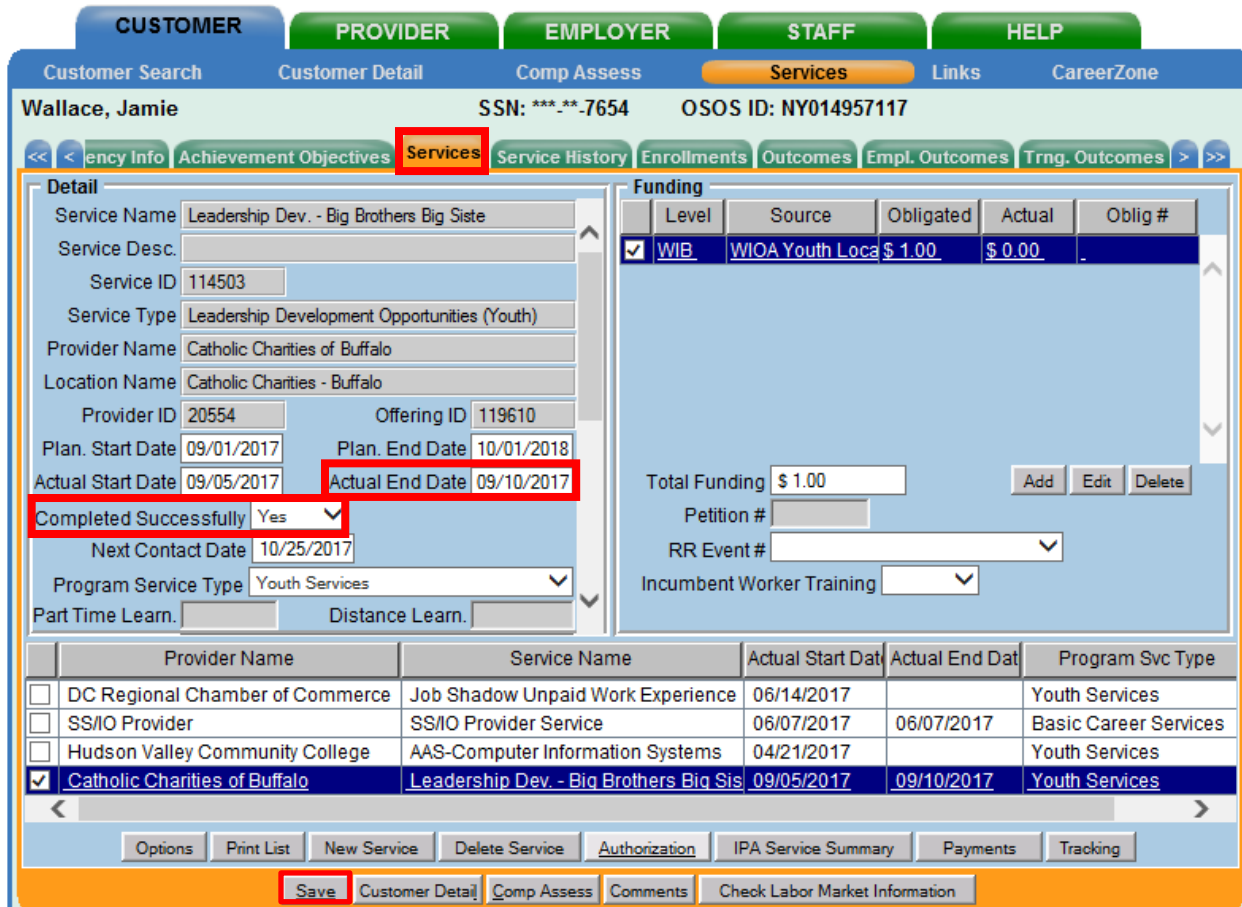
ADD SENSE COMMENTS

After attaching any service, or to record each interaction you have with a youth, write effective and quality case notes in OSOS using the Situation, Evaluation, Next Steps, Sufficient Information, Employment-Related Information Only (SENSE) Model.

See the [Resources section](#) for guides on using the SENSE Model.

CLOSING THE YOUTH SERVICE

To close the service in OSOS, enter the **Actual End Date** and select a completion status in the **Completed Successfully** field. Then click **Save** at the bottom of the screen.



The screenshot shows the OSOS interface for a customer named Wallace, Jamie. The 'Services' tab is active, and the 'Actual End Date' is set to 09/10/2017. The 'Completed Successfully' field is set to 'Yes'. The 'Save' button is highlighted at the bottom of the screen.

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

Provider Name	Service Name	Actual Start Dat	Actual End Dat	Program Svc Type
<input type="checkbox"/>	DC Regional Chamber of Commerce	Job Shadow Unpaid Work Experience	06/14/2017	Youth Services
<input type="checkbox"/>	SS/IO Provider	SS/IO Provider Service	06/07/2017	Basic Career Services
<input type="checkbox"/>	Hudson Valley Community College	AAS-Computer Information Systems	04/21/2017	Youth Services
<input checked="" type="checkbox"/>	Catholic Charities of Buffalo	Leadership Dev. - Big Brothers Big Sis	09/05/2017	Youth Services



If there are no open services, then the automatic 90-day exiting process will start as of the Actual End Date of the last service (see [Technical Advisory 11-7](#) for more information). Please note that Follow-up Services provided to the youth should begin when the last service ends. Along with entering Follow-up Services, staff should also enter any performance measure outcomes the youth achieved during the program or will achieve after the last service has been provided. For more information on recording outcomes, go to the [Resources](#) section below and follow the website link for additional OSOS Guides.



BEST PRACTICES FOR ENTERING SERVICES

- Next Contact Date – Staff are urged to use the Next Contact Date field under the Customer Module, Services Window, Services Tab. This will set a reminder in the Staff Inbox to touch base with the youth and/or update the service depending on the youth’s status.
- Planned end dates – Under the Customer Module, Services Window, Services Tab staff often place an extended amount of time in the Planned End Date field. The extended service time may cause staff to forget the open service that is attached to the youth record, resulting in poor service quality which may keep the youth in the Performance Measures when he/she has already achieved his/her goals in the WIOA program. It is recommended that shorter time frames are used when developing planned end dates correlating with the youth’s Individual Service Strategy.
- Achievement Objectives – Under the Customer Module, Services Window, Services Tab staff assign an Achievement Objective that serves as a goal, in relation to the Individual Services Strategy. Make sure the services provided align with the Achievement Objectives.
- Service Designation – There are no specific requirements for LWDA’s when naming services. However, if there are multiple Youth Program providers for one LWDA, it is recommended that similar services are uniformly named across the providers. For example, a LWDA may have three Youth Program providers who provide tutoring. The LWDA could name this service “Tutoring- Improving Basic Skills” for all three providers.
- If a LWDA has changed youth providers (e.g. due to the issuance of a new Request for Proposal) it is important to ensure services are entered under the correct providers.
- L2 WIOA Youth Services – Some local services could fit into multiple WIOA Youth Program Elements. Report the service under a Service Type that best fits the definition of services described in Training and Employment Guidance Letter 21-16.



RESOURCES AND ASSISTANCE

Technical Advisory 11-7: Common Enrollments and Exits, and Inclusion in Workforce Investment Act and Wagner-Peyser Performance Measures

<https://labor.ny.gov/workforcenypartners/ta/TA11-7.pdf>

For details on the WIOA 14 elements read TEGL 21-16:

https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=7159

Desk Guide for Provider Module Data Entry and Maintenance (page 28)

<https://labor.ny.gov/workforcenypartners/osos/osos-desk-guide-provider-module.pdf>

SENSE Comments – Write effective and quality case notes in OSOS using the Situation, Evaluation, Next Steps, Sufficient Information, Employment-Related Information Only (SENSE)

Model to record each interaction you have with a youth.

- o [Worksheet for writing an effective case note in OSOS](#)
- o [Video for writing quality case notes in OSOS](#)

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

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

For further assistance with data entry, please contact the OSOS Help Desk:

By phone: (518) 457-6586

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

For questions related to Youth programs, please contact the NYSDOL Program Development Office, Youth Team By email: youthoffice@labor.ny.gov