

QUEST NDWG OSOS Guide



Table of Contents

Purpose	1
Searching for the Customer	3
Quick Search	4
Basic Customer Record	10
Basic Customer Record Details	11
Case Notes	18
Comprehensive Assessment	19
Services	22
Entering the Service	22
Closing a Service.....	33
Outcomes.....	35
Training Outcomes.....	35
Employment Outcomes	41
Business Engagement	Error! Bookmark not defined.
Resources and Assistance	45

PURPOSE

In May 2023, the United States Department of Labor announced the availability of funding for the 2023 Quality Jobs, Equity, Strategy, and Training (QUEST) Disaster Recovery National Dislocated Worker Grant (DWG) to increase employer and workforce system customer access to good jobs in the industry sectors most impacted by the COVID-19 pandemic. The New York State Department of Labor (NYSDOL) was awarded \$5 million under the QUEST NDWG and has partnered with CNY Works, Inc to continue the Workforce Forward: Syracuse project, which expands upon existing I-81 initiatives and includes new infrastructure and care economy projects in the Onondaga County Local Workforce Development Area (LWDA). This project aims to achieve QUEST’s goals, including access to good jobs in the infrastructure and care economy sectors, by utilizing pre-employment work readiness programs and expanding career exploration assessments, comprehensive supportive services, business engagement via quality jobs development, community outreach initiatives, and advancing workforce training partnerships.

The project targets local job seekers, including long-term unemployed, underemployed, low-skilled, additional populations with barriers to employment (e.g., veterans, formerly justice-



involved, people with disabilities, women, minorities, etc.), and individuals who previously would have been eligible for the Trade Adjustment Assistance (TAA) program.

Currently NYSDOL is partnering with New York State Department of Transportation (NYSDOT) in developing its I-81 project talent pipeline to identify and include more priority “hire ready” job seekers for its Local Hire Incentive referral program. The project will expand existing work readiness programs and job networks to create a greater “hire ready” applicant pool for approved I-81 contractors, subcontractors, and other employers.

The One-Stop Operating System (OSOS) is the primary case management system used for tracking all services provided to customers throughout the Workforce Development System. OSOS collects substantial information from customers, businesses, and training providers. This information is also used to prepare required State and Federal reports.

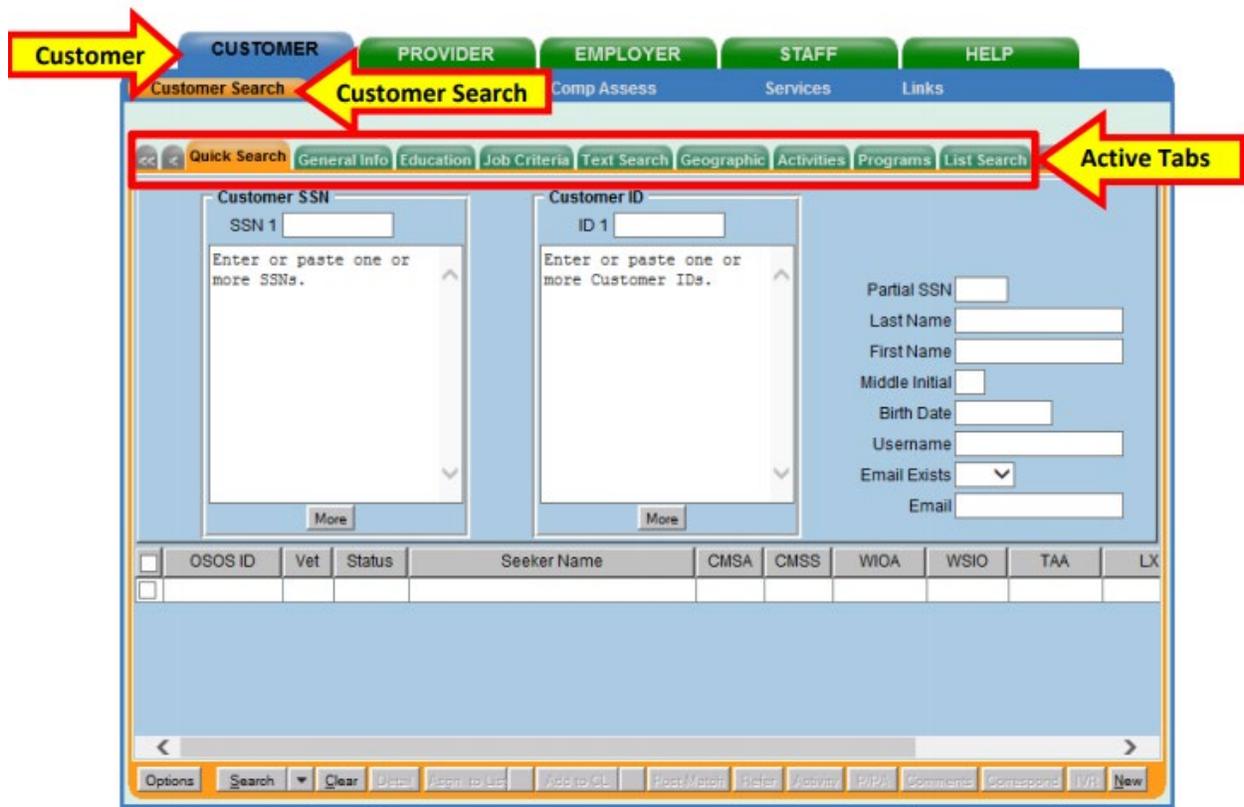
This guide provides instructions on how to conduct the OSOS data entry for the QUEST NDWG project.

SEARCHING FOR THE CUSTOMER

When staff enter customer data into OSOS, it is important to determine if a record already exists for the customer. In addition, there may be instances where there are two existing records, or duplicate records, for the customer. When this occurs, we often see that one account has a Social Security Number and one does not. Following the instructions below ensures that any duplicate records can be found and addressed accordingly.

Searches are performed within the **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 a sub-field for **SSN 1**) and **Customer ID** (with a sub-field for **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 the input fields is a table with columns: **OSOS ID**, **Vet**, **Status**, **Seeker Name**, **CMSA**, **CMSS**, **WIOA**, **WSIO**, **TAA**, and **LX**. At the bottom of the interface is a toolbar with buttons for **Options**, **Search**, **Clear**, **Print**, **Apply to List**, **Add to CL**, **Post Match**, **Refresh**, **Activity**, **PIPA**, **Comments**, **Respond**, **IVR**, and **New**.

QUICK SEARCH

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

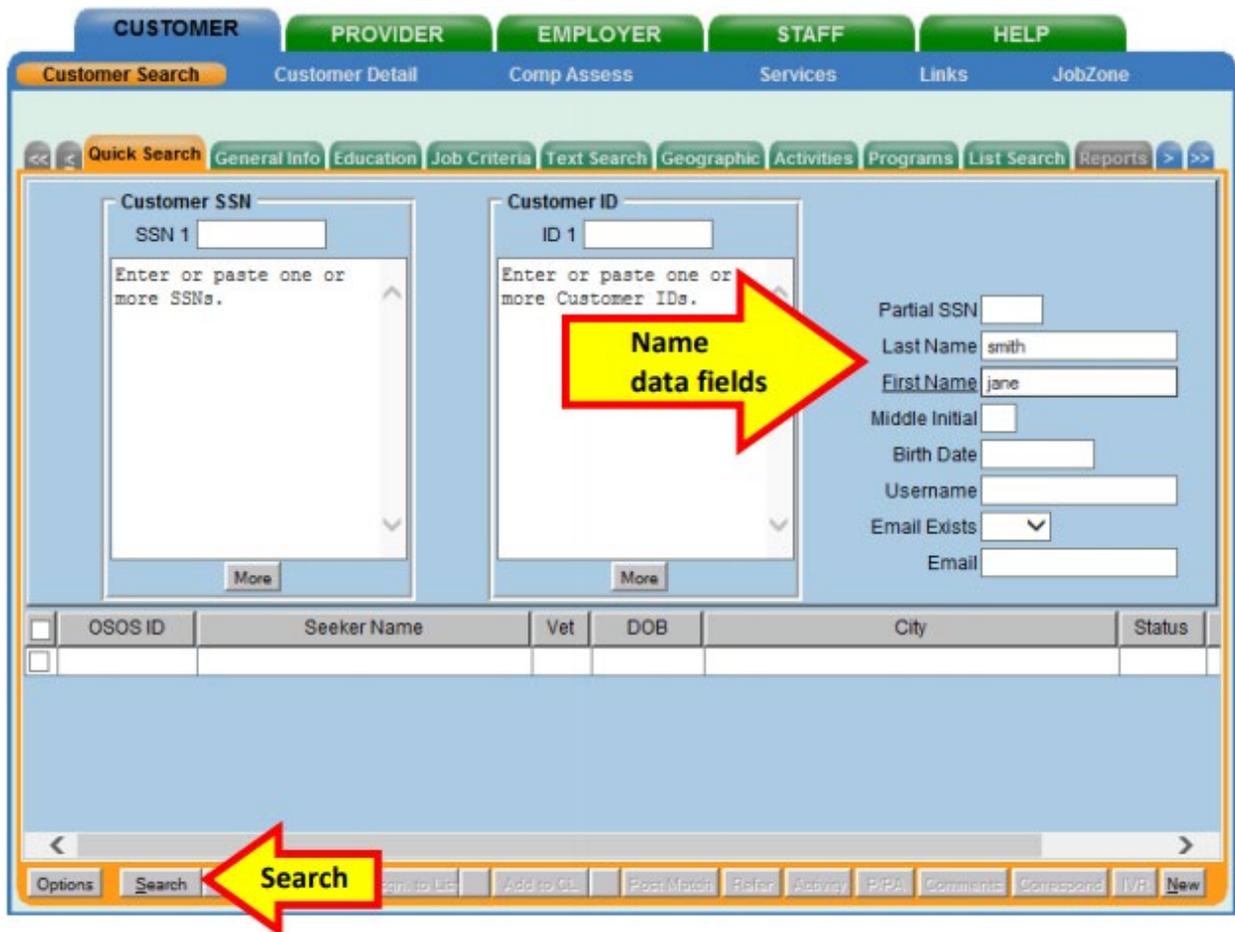
SEARCHING BY CUSTOMER FULL OR PARTIAL NAME

Staff may search for a customer record by full or partial name. Enter as much information as is known in the **Last Name** and **First Name** data fields.



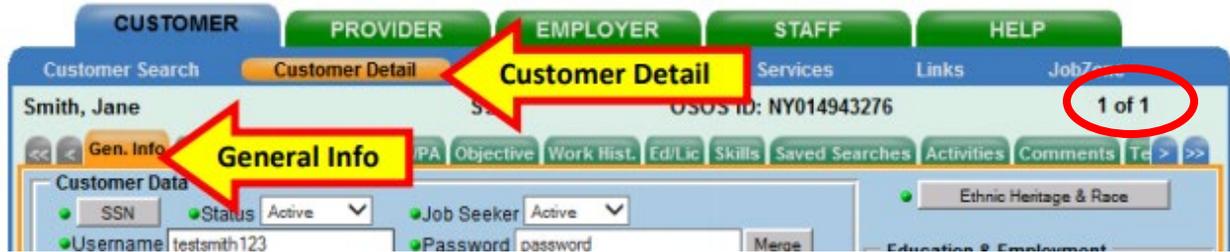
As a best practice, staff should perform a name search for any customer they are working with to determine if duplicate OSOS records exist for the same customer. If a duplicate record is found, please contact help.osos@labor.ny.gov.

Click the **Search** button.

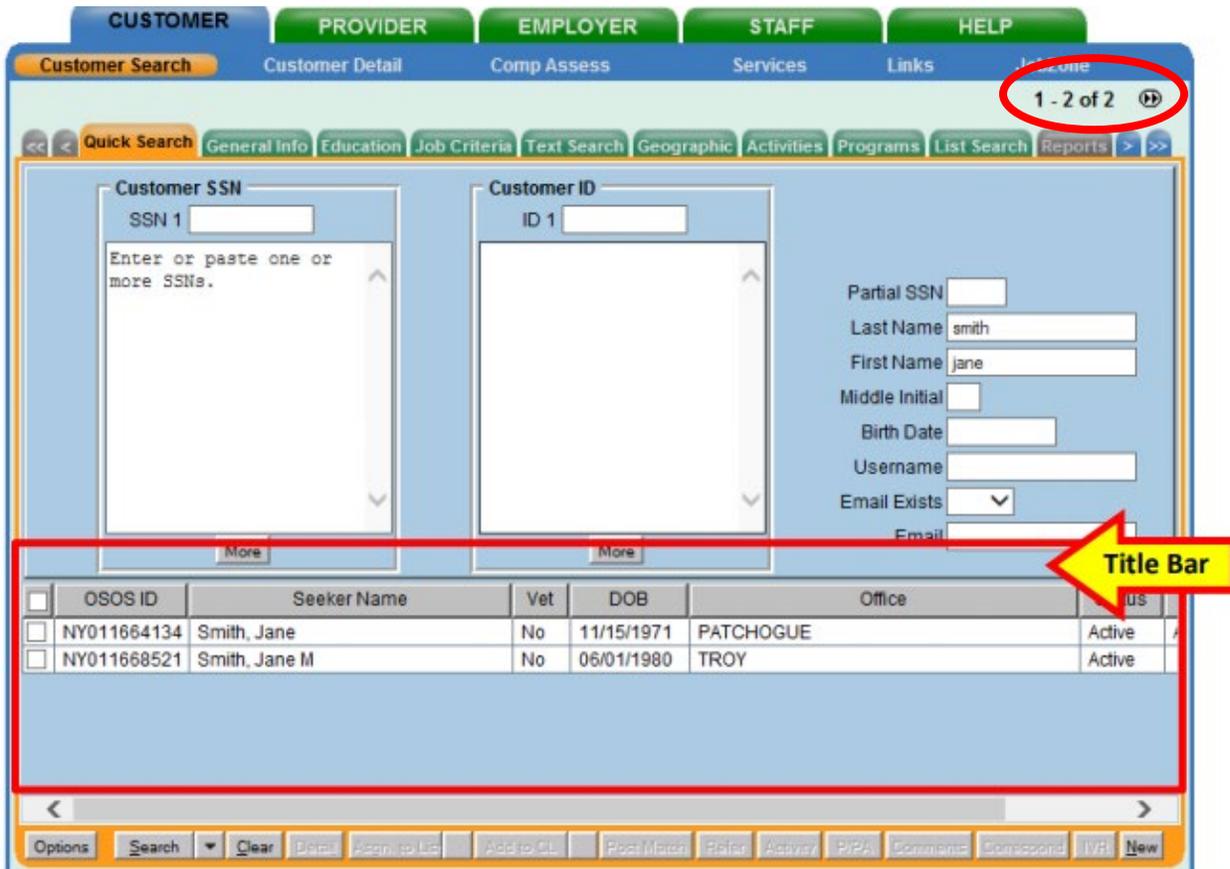


The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The 'Quick Search' sub-tab is selected, showing various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

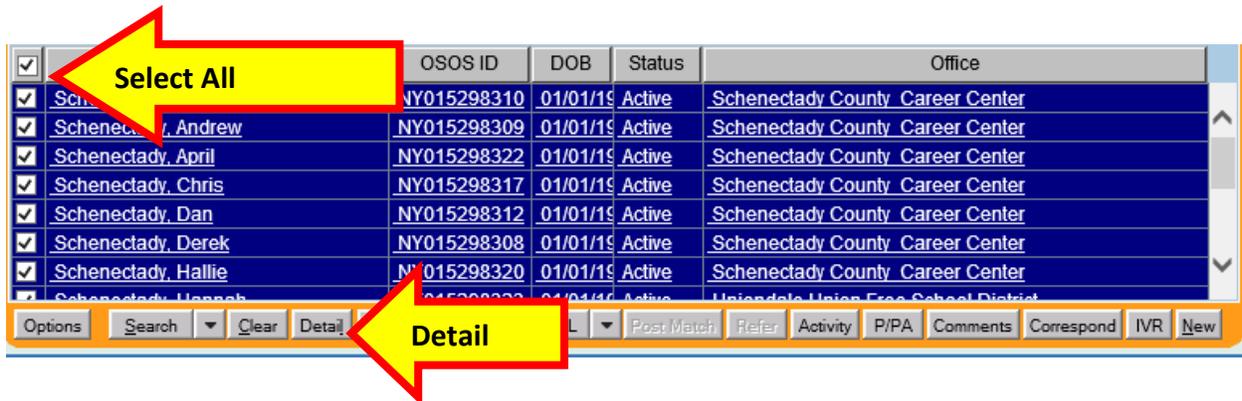
If there is only one result returned, OSOS will display the customer's record. It will default to the **General Information** tab of the **Customer Detail** window.



If there is more than one customer record matching the search criteria, the customers' information will be displayed in the window below the data entry fields.



If the search yields more than one result, staff can view all the records by first clicking on the check box in the top left-hand corner of the gray title bar. This will select all the results. Staff can then click on **Detail** at the bottom of the screen to review all selected customer records.



The screenshot shows a table of search results with columns for OSOS ID, DOB, Status, and Office. A yellow arrow labeled "Select All" points to the top-left checkbox of the table. Another yellow arrow labeled "Detail" points to the "Detail" button in the bottom toolbar.

<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

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



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 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

Education & Employment

Education Level HS + 2 yr Associates Degree

School Status Not Attending School; Secondary Scho

Employment Status Not Employed

Underemployed

Long Term Unemployed

Contact Preferences

Use Postal Fax

Pri. Phone Email

Alt. Phone Resume Contact Info

Customer Assignment

Staff Assigned Change

WIB Assigned Albany/Rensselaer/Schenectady Counties

Agency Department of Labor Change Office

Office ALBANY

UI Claimant Work Search Record

Registered 03/08/2017

Origin Staff

Profiled

Profiled Date

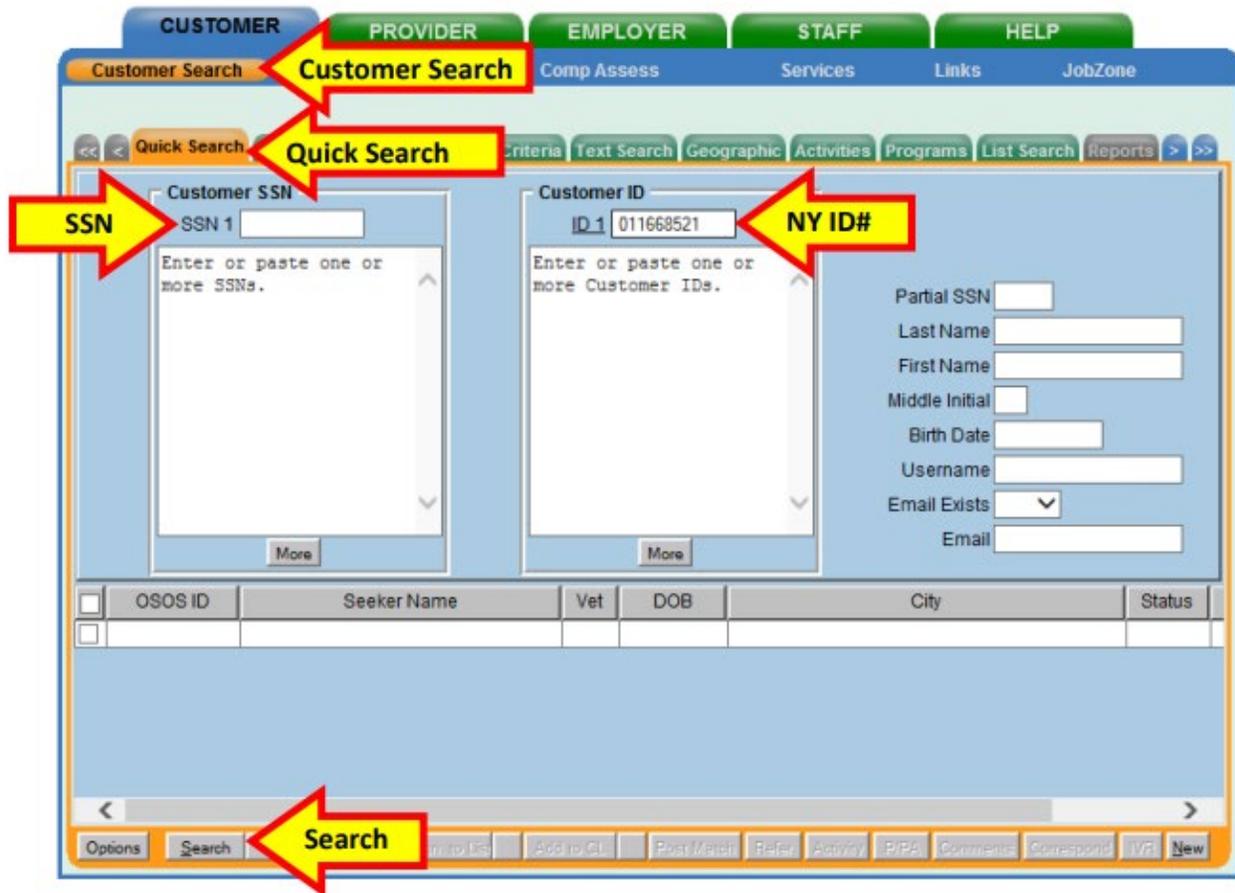
Internet Resume Confidential

Save Start Match Services Comp Assess Activity I.A. Referrals Correspond IVR Bet 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 interface with the following elements highlighted by red arrows:

- Customer Search** tab (top navigation)
- Quick Search** sub-tab (top navigation)
- SSN** field (left search input)
- NY ID#** field (right search input)
- Search** button (bottom navigation)

The search form includes the following fields:

- Customer SSN (SSN 1)
- Customer ID (ID_1 011668521)
- Partial SSN
- Last Name
- First Name
- Middle Initial
- Birth Date
- Username
- Email Exists (dropdown)
- Email

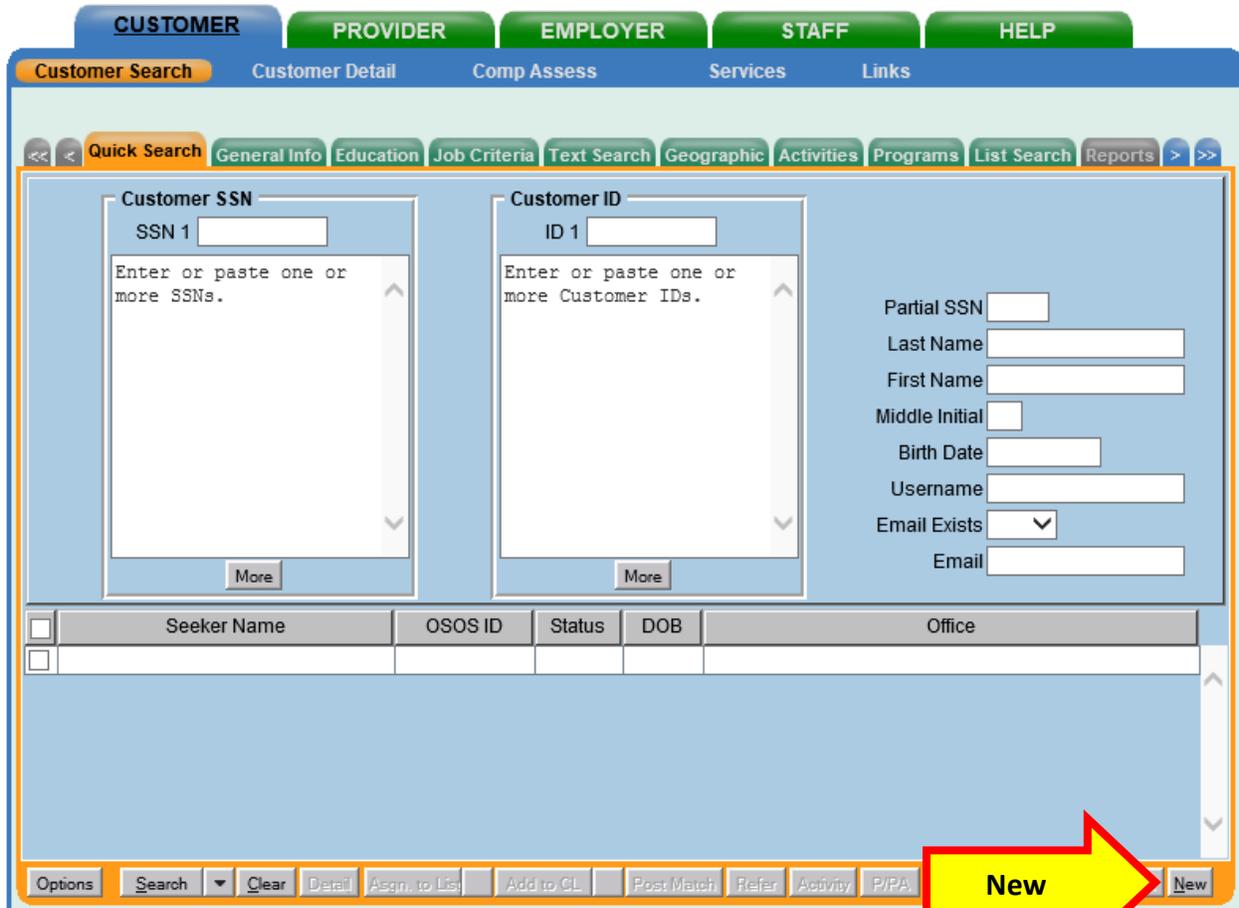
Below the search form is a table with the following columns: OSOS ID, Seeker Name, Vet, DOB, City, Status.

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



*The search can be based on either SSN or ID number, but it cannot be based on both. Including data in both the **Customer SSN** field and the **Customer ID** field will result in an error message.*

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



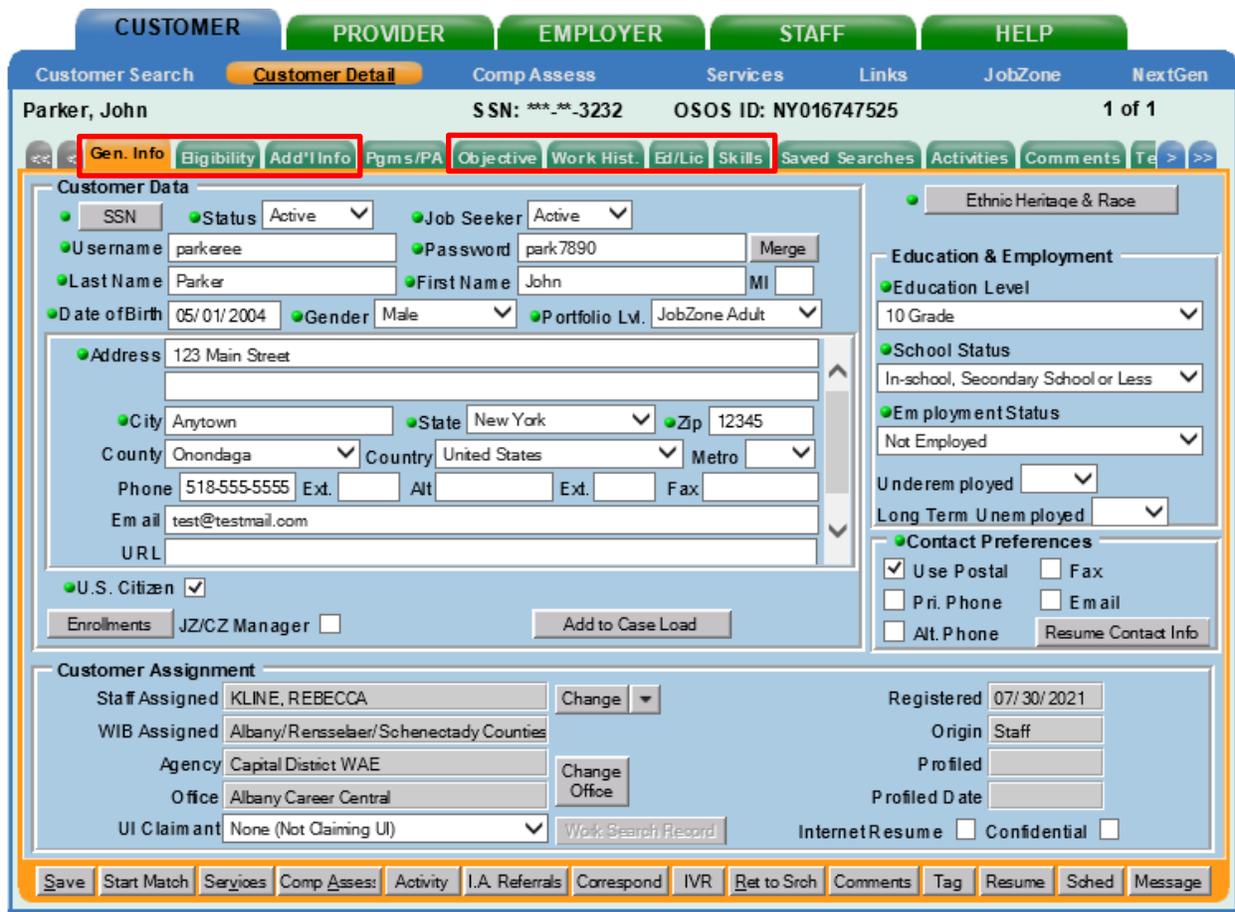
For detailed information on searching for a customer record, please see the [Performing a Customer Search OSOS Guide](#).

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

BASIC CUSTOMER RECORD

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

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



CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

Parker, John SSN: ***-**-3232 OSOS ID: NY016747525 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 parkeree Password park7890 Merge
 Last Name Parker First Name John MI
 Date of Birth 05/01/2004 Gender Male Portfolio Lvl JobZone Adult

Address 123 Main Street
 City Anytown State New York Zip 12345
 County Onondaga Country United States Metro
 Phone 518-555-5555 Ext. Alt. Fax
 Email test@testmail.com
 URL
 U.S. Citizen

Enrollments JZ/CZ Manager Add to Case Load

Customer Assignment

Staff Assigned KLINE, REBECCA Change
 WIB Assigned Albany/Rensselaer/Schenectady Counties
 Agency Capital District WAE Change Office
 Office Albany Career Central
 UI Claimant None (Not Claiming UI) Work Search Record

Registered 07/30/2021
 Origin Staff
 Profiled
 Profiled Date
 Internet Resume Confidential

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



All required fields in OSOS are indicated by a green dot ● in front of the field name.

To save the basic customer record, all required fields must be completed. However, to best serve the customer, staff should always enter as much information as possible.



Do not click Save until all the required information, in all tabs, is recorded for the complete basic customer record. If Save is selected before the data is completely entered, it will generate an error message. If this error message does appear, you will still be able to continue with the record by clicking OK and continuing to enter the information. Instead, when creating the customer record, simply select the next appropriate tab. Click Save when all the required information has been entered.

Staff must review all of the information in the customer record each time they work with the customer. This ensures that the record reflects the most up to date and accurate information.

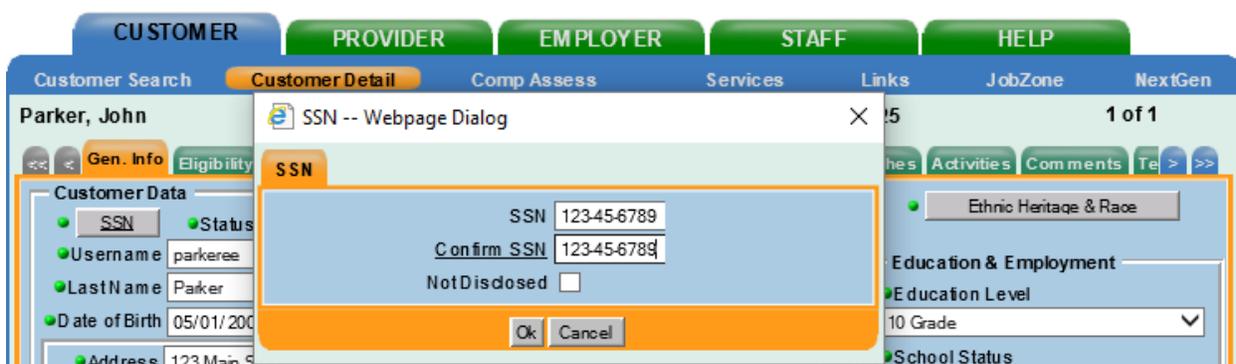
BASIC CUSTOMER RECORD DETAILS

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

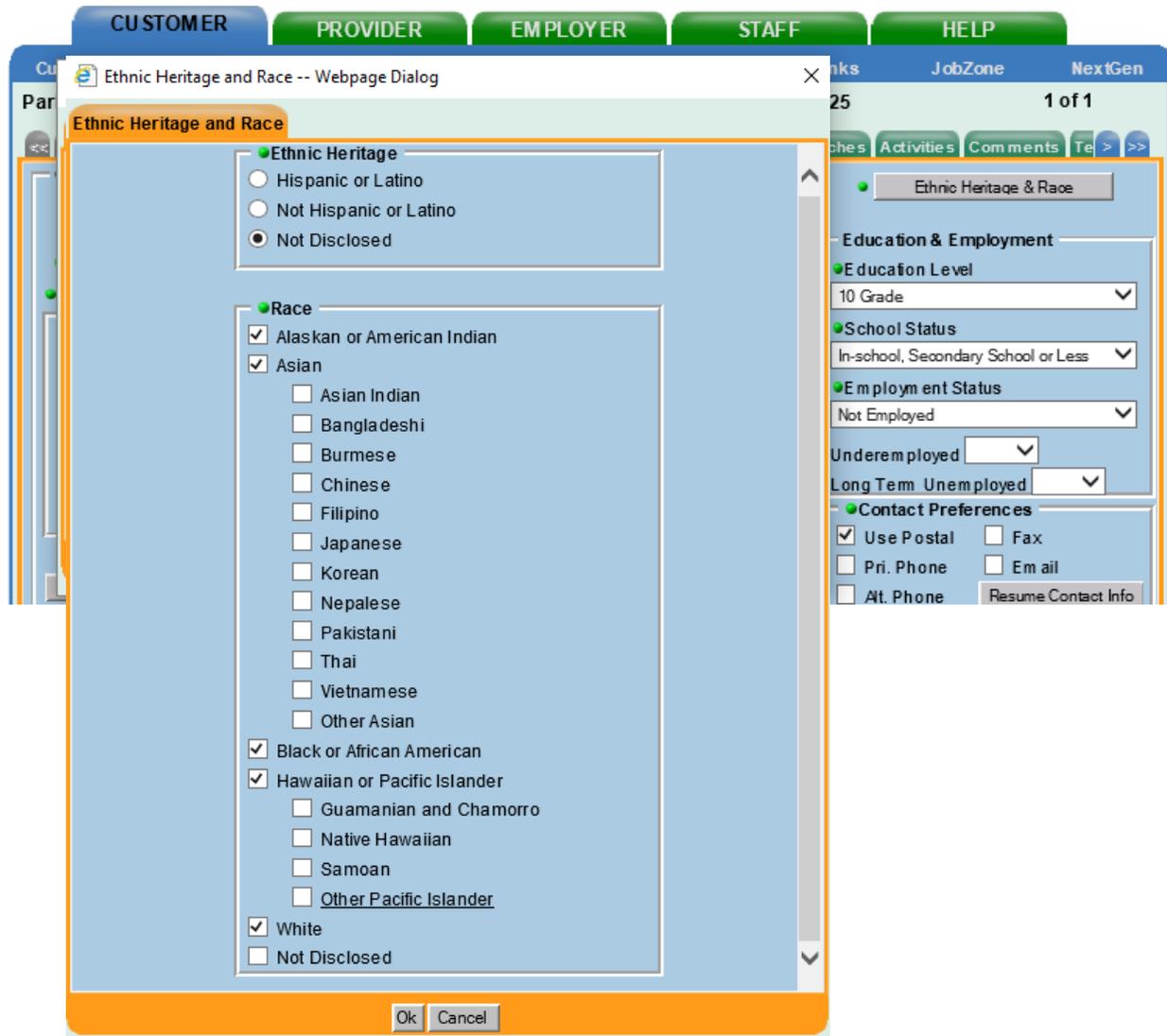
Below are some noteworthy points for filling out the tabs located within the **Customer Detail** window.

General Info Tab

- **SSN:** The SSN field is located "behind" a button in order to keep it as confidential as possible. When the customer provides their SSN it must be entered. Having an SSN in OSOS is very important because customer SSNs are used to match against wages and determine if the customer is employed. Entering a customer's SSN also helps prevent duplicate records.



- Ethnic Heritage & Race:** 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 also located "behind" the button in order to keep it as confidential as possible.



Ethnic Heritage and Race

Ethnic Heritage

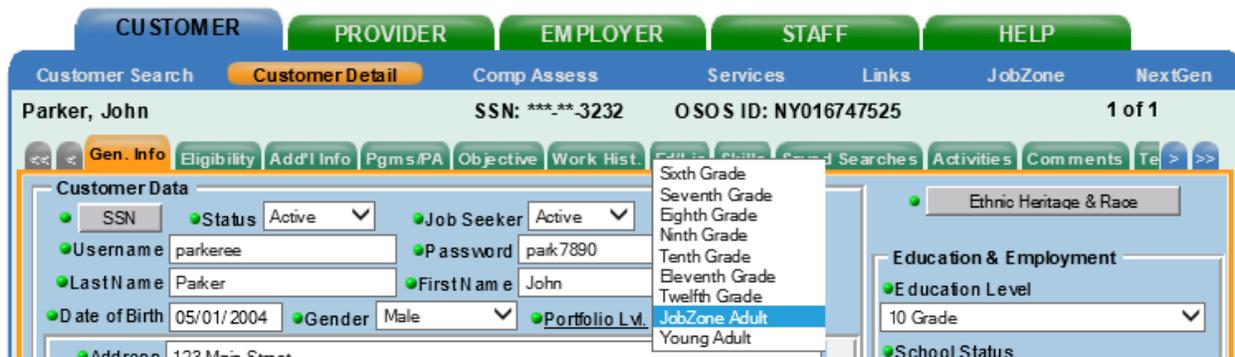
- Hispanic or Latino
- Not Hispanic or Latino
- Not Disclosed

Race

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

Ok Cancel

- **Portfolio Level** - A new record will default to **JobZone Adult**.
- **Username and Password** - While this is a required field, any record with **Portfolio Lvl** set to **JobZone** will not use these fields for JobZone access. All **Portfolio Lvl**s other than **JobZone Adult** will use these fields as login credentials for CareerZone. Any unique username and any password may be entered in these fields, as long as they are at least 6 characters in length.



CUSTOMER | PROVIDER | EMPLOYER | STAFF | HELP

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

Parker, John | SSN: ***-**-3232 | OSOS ID: NY016747525 | 1 of 1

Gen. Info | Eligibility | Add'l Info | Pgms/PA | Objective | Work Hist. | ... | Searches | Activities | Comments | Tel

Customer Data

- SSN: []
- Status: Active
- Job Seeker: Active
- Username: parkeree
- Password: park7890
- Last Name: Parker
- First Name: John
- Date of Birth: 05/01/2004
- Gender: Male
- Portfolio Lvl: JobZone Adult

Education & Employment

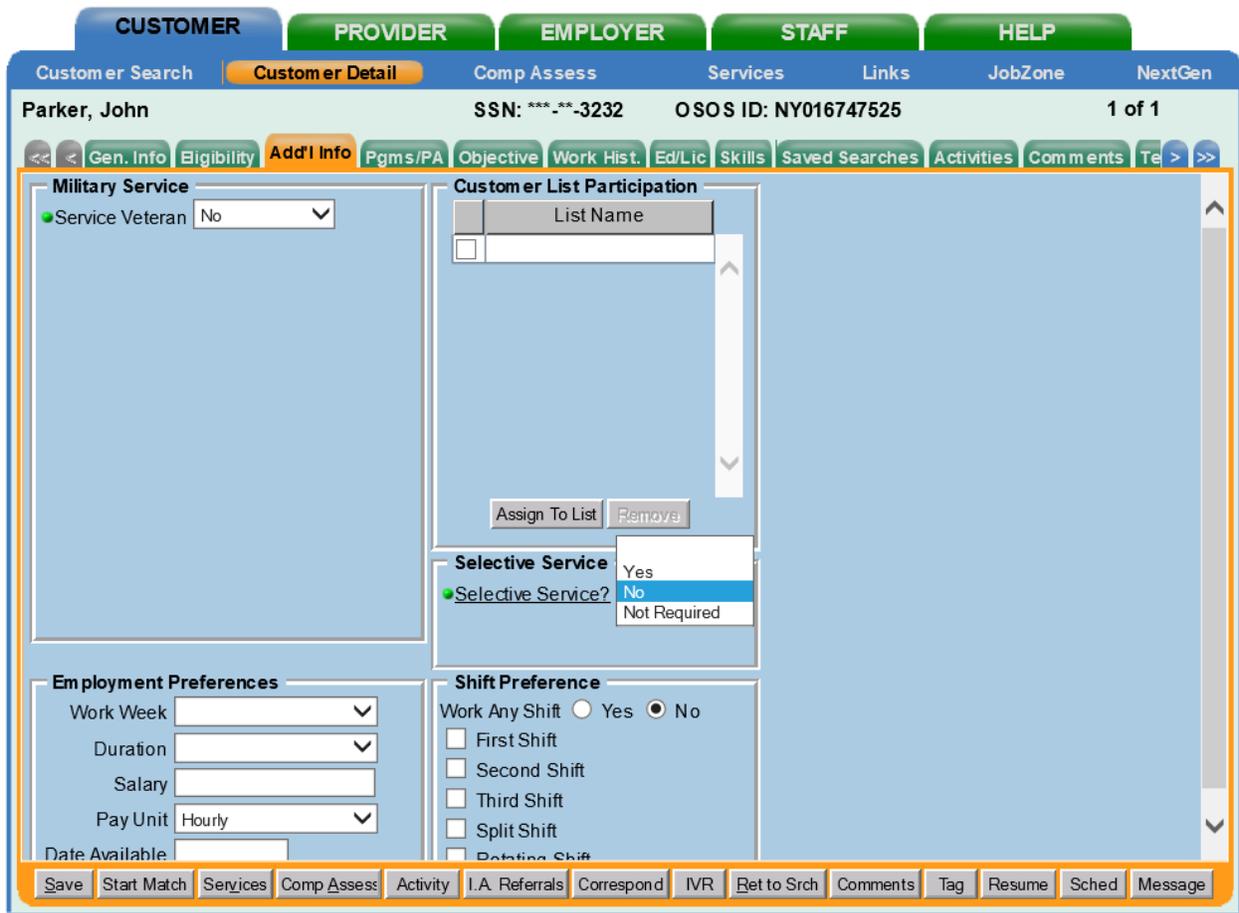
- Education Level: 10 Grade
- School Status: []

Ethnic Heritage & Race

[]

Additional Info Tab

- **Veteran Status** is required. Staff may select Yes, No or Not Disclosed.
- **Selective Service** must be updated based on whether or not the customer is required to register to selective service. If the customer was born female, staff should select Not Required. If the customer was born male, staff must select Yes or No.
- Additional information entered on this tab can be used to match customers to relevant job postings.



The screenshot shows the OSOS Customer Detail page for John Parker. The page is divided into several sections:

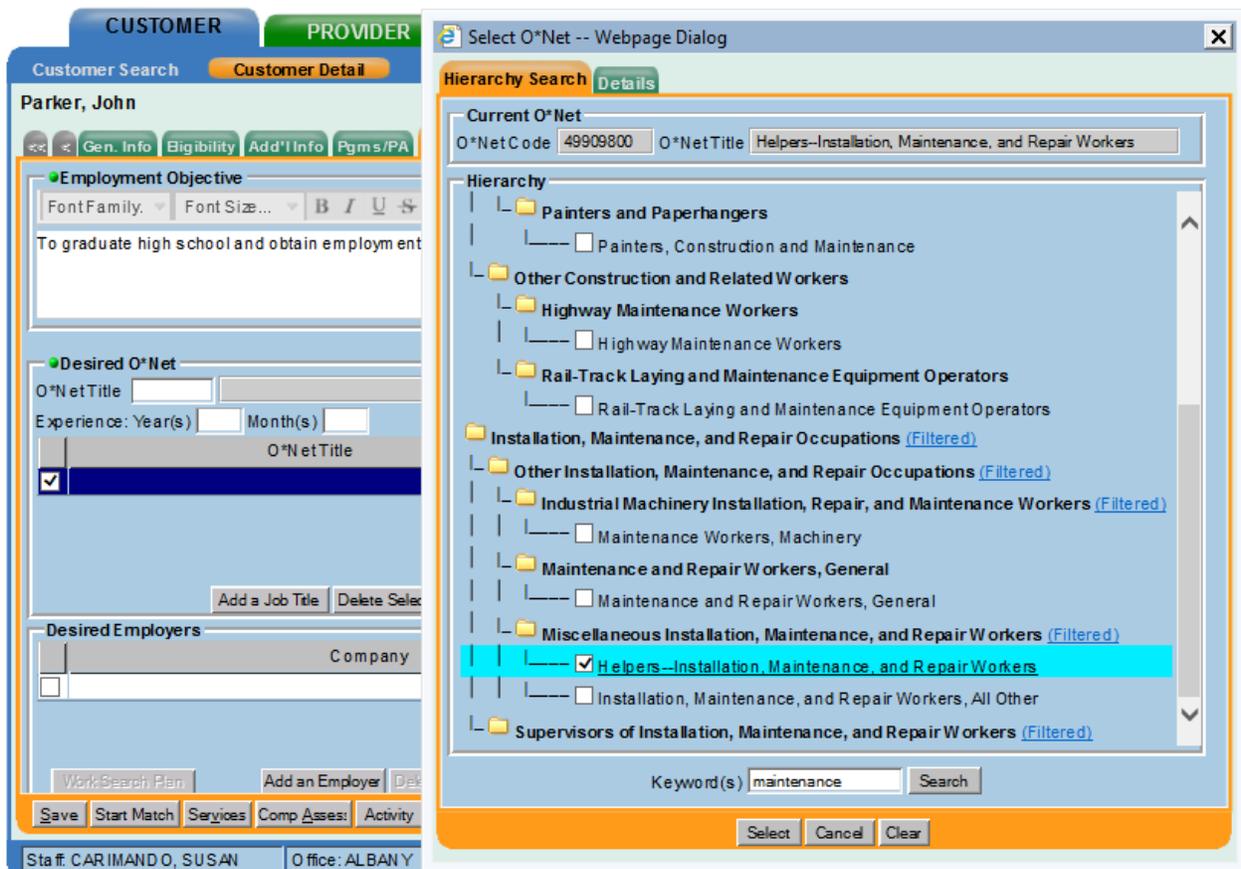
- Customer Information:** Parker, John; SSN: ***-**-3232; OSOS ID: NY016747525; 1 of 1.
- Navigation:** CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP. Sub-tabs: Customer Search, Customer Detail (selected), Comp Assess, Services, Links, JobZone, NextGen.
- Tabbed Interface:** Gen. Info, Eligibility, Add'l Info (selected), Pgms/PA, Objective, Work Hist., Ed/Lic, Skills, Saved Searches, Activities, Comments, Te, >>.
- Military Service:** Service Veteran: No.
- Customer List Participation:** A table with columns for List Name and checkboxes. Below the table are buttons for "Assign To List" and "Remove".
- Selective Service:** Selective Service?: No (selected).
- Employment Preferences:** Work Week, Duration, Salary, Pay Unit (Hourly), Date Available.
- Shift Preference:** Work Any Shift: Yes (radio), No (radio selected). Options: First Shift, Second Shift, Third Shift, Split Shift, Rotating Shift.
- Footer:** Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, Message.

Programs / PA Tab

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

Objective Tab

- **Desired O*Net:** At least one **O*Net title** is required. Click the **Add a Job Title** button. Then, click the **O*Net Titles** button. This opens the Select O*Net Webpage Dialogue box. Use the Keyword search at the bottom or the O*Net folder hierarchy to find the job title most closely related to the employment the participant is seeking. Check the box next to the job title. Then click **Select**.



The screenshot displays the OSOS software interface. On the left, the 'CUSTOMER' tab is active, showing the 'Customer Detail' for 'Parker, John'. The 'Employment Objective' is 'To graduate high school and obtain employment'. The 'Desired O*Net' section has a table with one entry checked:

O*Net Title
<input checked="" type="checkbox"/>

Below this is the 'Desired Employers' section with a 'Company' field. At the bottom of the main window, there are buttons for 'Save', 'Start Match', 'Services', 'Comp Asses', and 'Activity'. The staff information is 'Staff: CARIMANDO, SUSAN' and 'Office: ALBANY'.

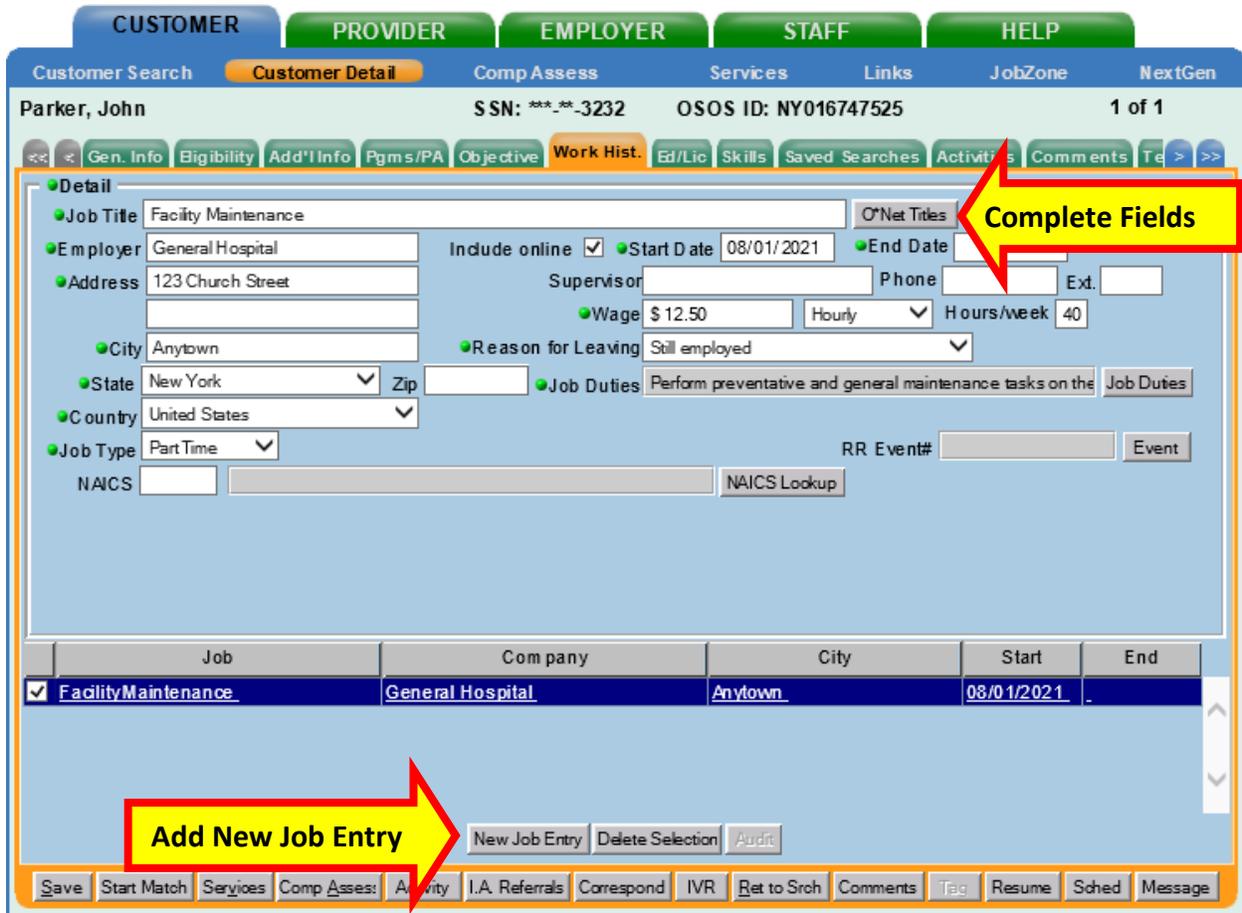
On the right, the 'Select O*Net -- Webpage Dialog' window is open. It shows a 'Hierarchy Search' view with a tree structure of O*Net titles. The 'Current O*Net' is 'Helpers--Installation, Maintenance, and Repair Workers'. The 'Hierarchy' list includes:

- Painters and Paperhangers
 - Painters, Construction and Maintenance
- Other Construction and Related Workers
 - Highway Maintenance Workers
 - Rail-Track Laying and Maintenance Equipment Operators
- Installation, Maintenance, and Repair Occupations (Filtered)
 - Other Installation, Maintenance, and Repair Occupations (Filtered)
 - Industrial Machinery Installation, Repair, and Maintenance Workers (Filtered)
 - Maintenance Workers, Machinery
 - Maintenance and Repair Workers, General
 - Maintenance and Repair Workers, General
 - Helpers--Installation, Maintenance, and Repair Workers
 - Installation, Maintenance, and Repair Workers, All Other
 - Supervisors of Installation, Maintenance, and Repair Workers (Filtered)

At the bottom of the dialog, there is a 'Keyword(s)' field containing 'maintenance' and a 'Search' button. Below the dialog are 'Select', 'Cancel', and 'Clear' buttons.

Work History Tab

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



CUSTOMER | PROVIDER | EMPLOYER | STAFF | HELP

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

Parker, John | SSN: ***-**-3232 | OSOS ID: NY016747525 | 1 of 1

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

Detail

Job Title: Facility Maintenance | O*Net Titles

Employer: General Hospital | Include online | Start Date: 08/01/2021 | End Date: |

Address: 123 Church Street | Supervisor: | Phone: | Ext: |

City: Anytown | Wage: \$12.50 | Hourly | Hours/week: 40

State: New York | Zip: | Reason for Leaving: Still employed

Country: United States | Job Duties: Perform preventative and general maintenance tasks on the | Job Duties

Job Type: Part Time | RR Event#: | Event

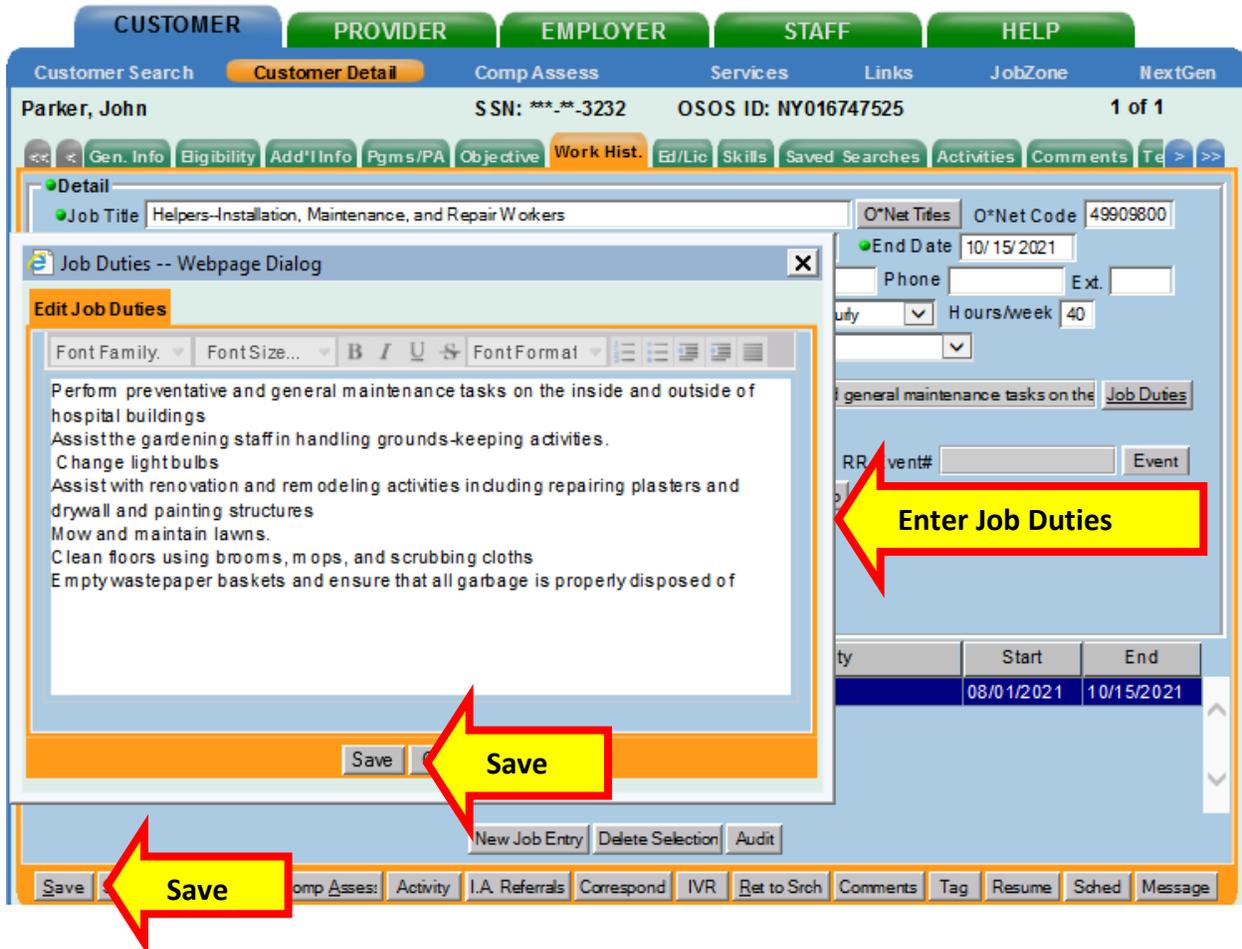
NAICS: | NAICS Lookup

Job	Company	City	Start	End
<input checked="" type="checkbox"/> FacilityMaintenance	General Hospital	Anytown	08/01/2021	.

Add New Job Entry | New Job Entry | Delete Selection | Audit

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

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



The screenshot shows the OSOS software interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are navigation tabs: Customer Search, Customer Detail (selected), Comp Assess, Services, Links, JobZone, and NextGen. The main area displays customer information for Parker, John, with SSN: ***-**-3232 and OSOS ID: NY016747525. A 'Job Duties -- Webpage Dialog' box is open, showing a text area with the following job duties: 'Perform preventative and general maintenance tasks on the inside and outside of hospital buildings', 'Assist the gardening staff in handling grounds-keeping activities.', 'Change light bulbs', 'Assist with renovation and remodeling activities including repairing plasters and drywall and painting structures', 'Mow and maintain lawns.', 'Clean floors using brooms, mops, and scrubbing cloths', and 'Empty wastepaper baskets and ensure that all garbage is properly disposed of'. A 'Save' button is visible at the bottom of the dialog box. A yellow arrow points to this 'Save' button. Another yellow arrow points to the 'Save' button at the bottom of the main window. A third yellow arrow points to the 'Job Duties' button in the main window.

Ed/Lic Tab

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

Skills Tab

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



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



CASE NOTES

It is important to document case notes in the customer record. It is best practice to record case notes every time staff work with the customer. Case notes are documented in the **Customer** module, **Customer Detail** window, **Comments** tab.



Case notes should include details of the appointment that are not recorded anywhere else in OSOS. They should be clear, factual, relevant to employment, and show a logical progression. Case notes allow staff to gain a more complete understanding of the customer's situation.

COMPREHENSIVE ASSESSMENT

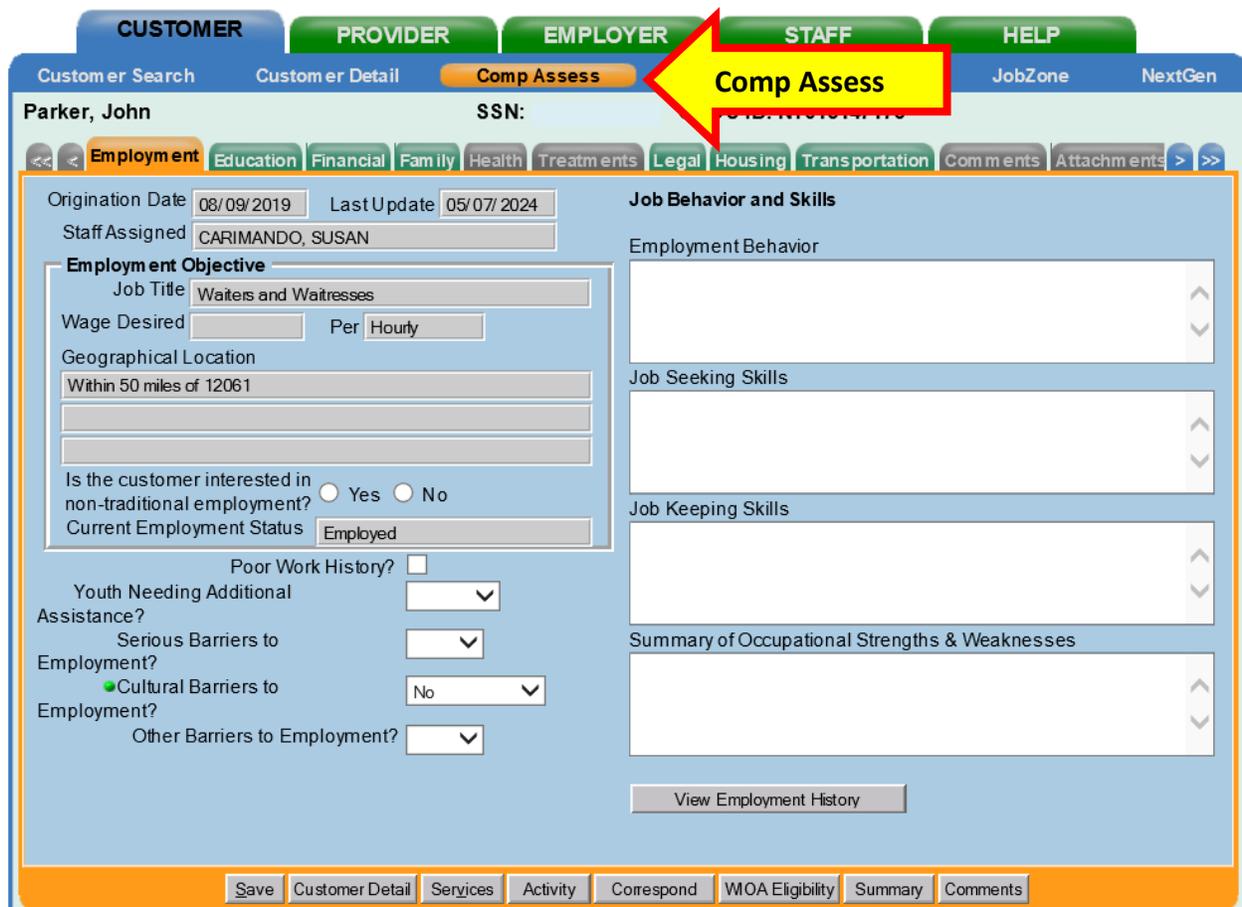
Information documented in the Comprehensive Assessment window is important for recording the customer's barriers and challenges. For detailed instructions on completing the Comprehensive Assessment, please see the [Comprehensive Assessment & Supplemental Data Guide](#).

Many of the fields in Comp Assess are used to determine eligibility under WIOA programs. Since the QUEST NDWG is a federally funded program, participants must be co-enrolled in the WIOA programs.

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



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



The screenshot displays the 'Comp Assess' window for customer John Parker. The interface includes a top navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with tabs for Customer Search, Customer Detail, **Comp Assess**, JobZone, and NextGen. The main content area is divided into several sections:

- Customer Information:** Parker, John; SSN: [redacted]
- Employment Objective:**
 - Job Title: Waiters and Waitresses
 - Wage Desired: [input field] Per Hourly
 - Geographical Location: Within 50 miles of 12061
 - Is the customer interested in non-traditional employment? Yes No
 - Current Employment Status: Employed
 - Poor Work History?
 - Youth Needing Additional Assistance? [dropdown menu]
 - Serious Barriers to Employment? [dropdown menu]
 - Cultural Barriers to Employment? No [dropdown menu]
 - Other Barriers to Employment? [dropdown menu]
- Job Behavior and Skills:**
 - Employment Behavior: [text area]
 - Job Seeking Skills: [text area]
 - Job Keeping Skills: [text area]
 - Summary of Occupational Strengths & Weaknesses: [text area]
- Buttons:** View Employment History, Save, Customer Detail, Services, Activity, Correspond, WIOA Eligibility, Summary, Comments



Below are some noteworthy points for filling out the tabs located within the **Comprehensive Assessment** window for participants only enrolled under the QUEST NDWG . Staff should always enter as much information as known about the customer to better serve and meet their needs.

Employment Tab

- **Cultural Barriers to Employment:** This information is collected as a requirement under WIOA.

Education Tab

- **Basic Skills Deficient/Low Levels of Literacy:** This is assessed based on the results of established, approved assessment. If unknown, select **No**.
- **English Language Learner:** An English Language Learner will have limited ability in speaking, reading, writing or understanding English. They may also meet one of the following two conditions:
 - Their native language is a language other than English; or
 - They live in a family or community where a language other than English is the main language.

Financial 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 the customer is considered an **Other Family Member**. Or, select **Not Disclosed**.



Health tab and **Treatment** tabs 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.

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

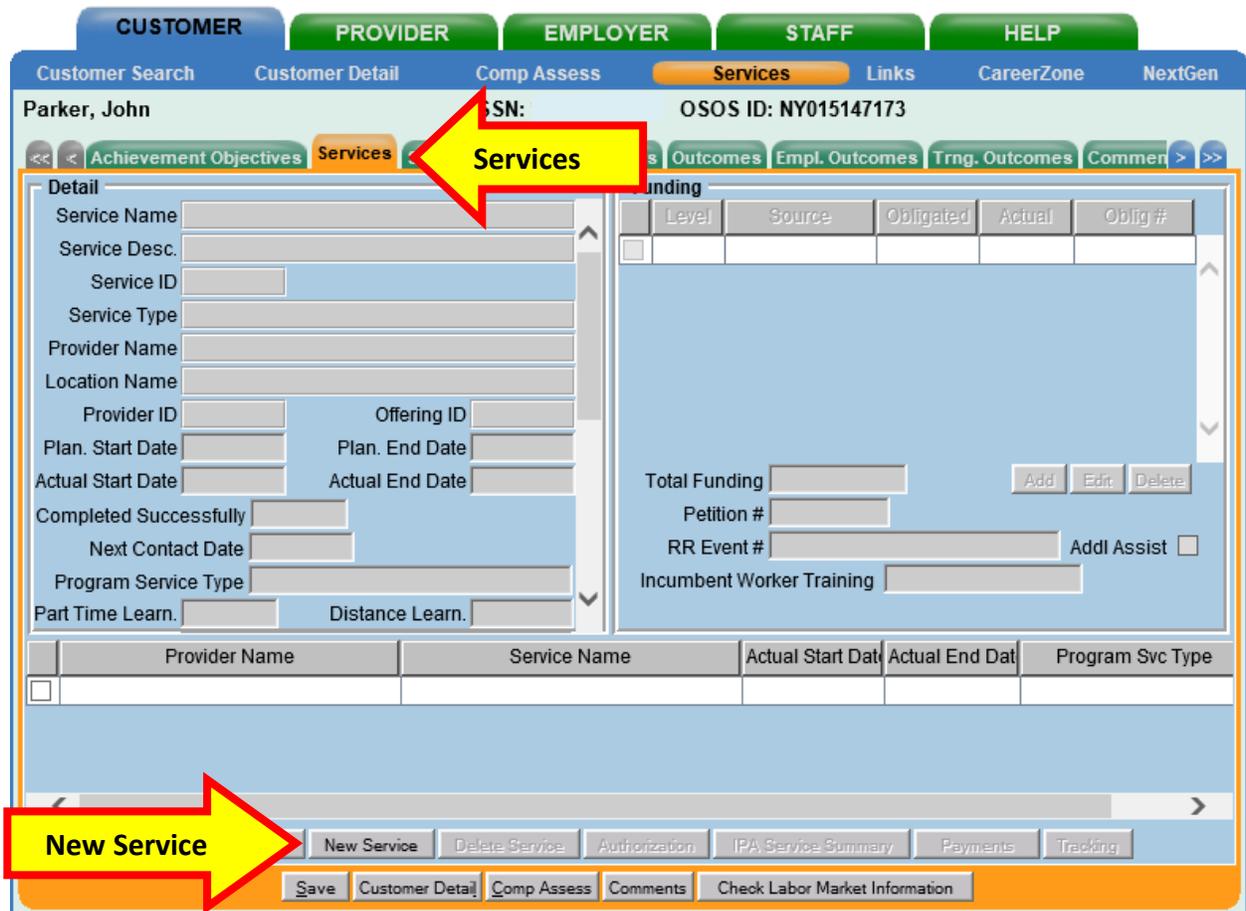
SERVICES

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

ENTERING THE SERVICE

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

Select the **New Service** button.

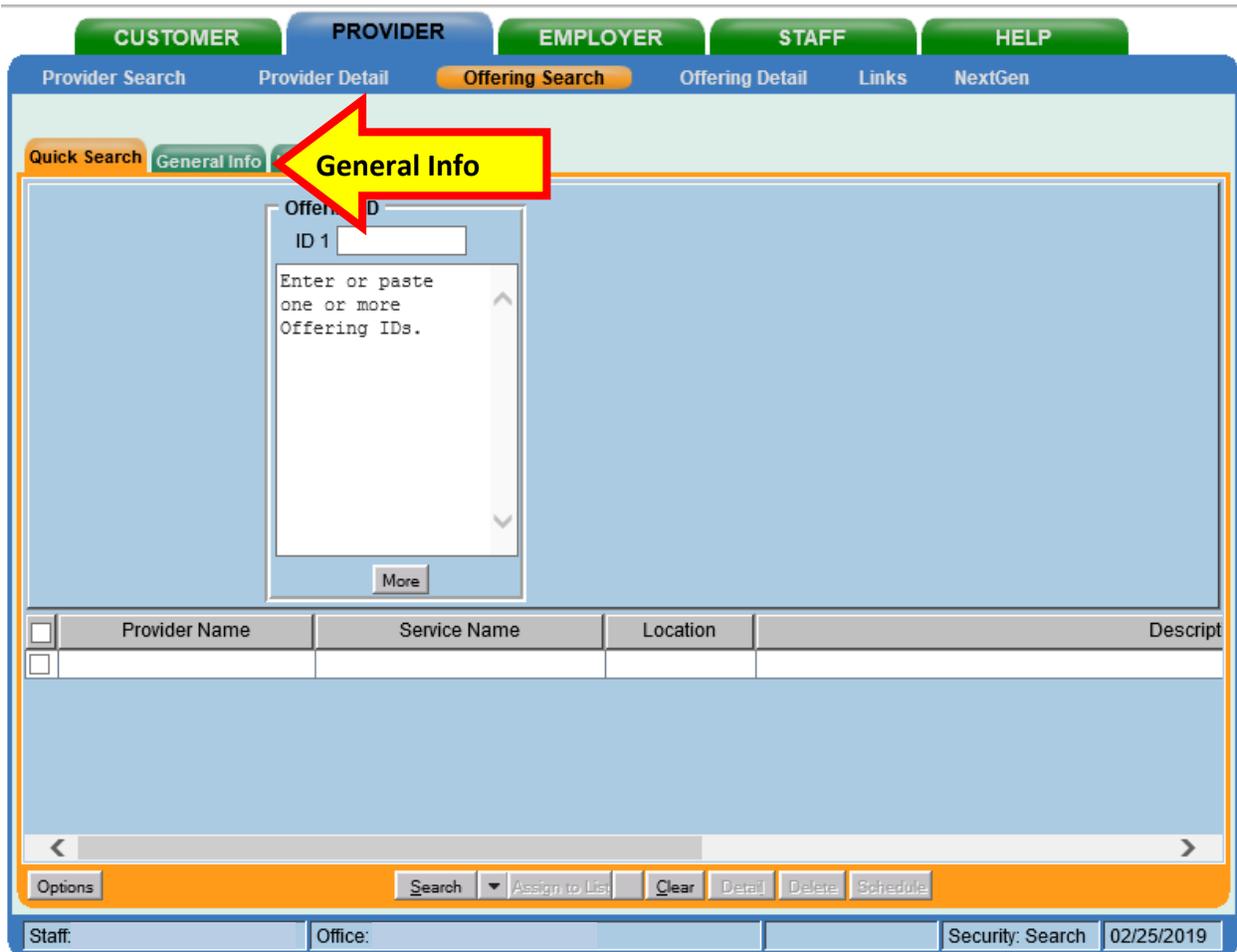


The screenshot shows the OSOS interface for a customer named Parker, John. The 'Services' tab is active, and the 'New Service' button is highlighted with a red arrow. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The main content area is divided into a 'Detail' section on the left and a 'Funding' section on the right. The 'Detail' section contains various input fields for service information, and the 'Funding' section contains a table for recording funding details. A red arrow points to the 'New Service' button at the bottom of the window.

Level	Source	Obligated	Actual	Oblig #

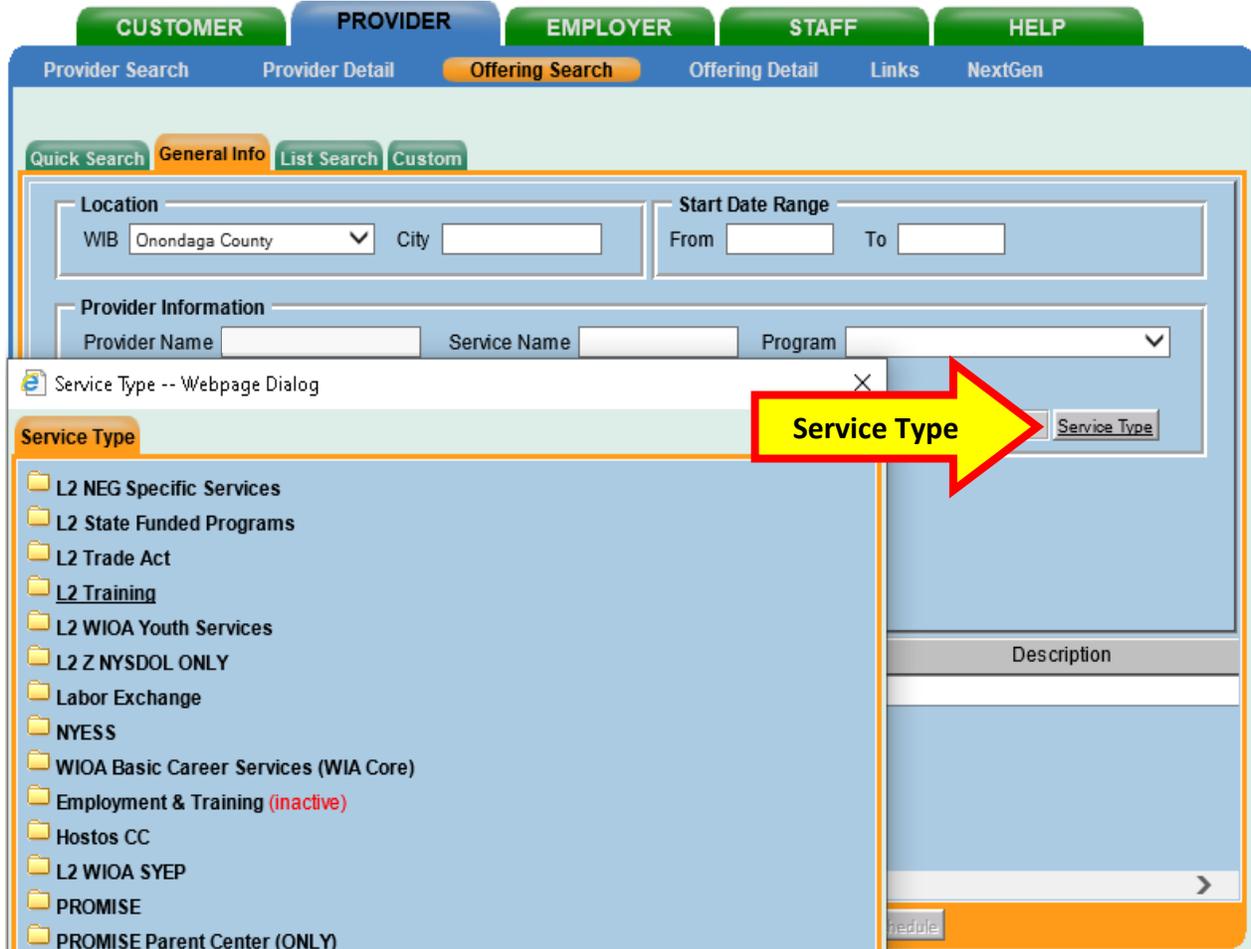
Buttons: Save, Customer Detail, Comp Assess, Comments, Check Labor Market Information, New Service, Delete Service, Authorization, IPA Service Summary, Payments, Tracking.

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

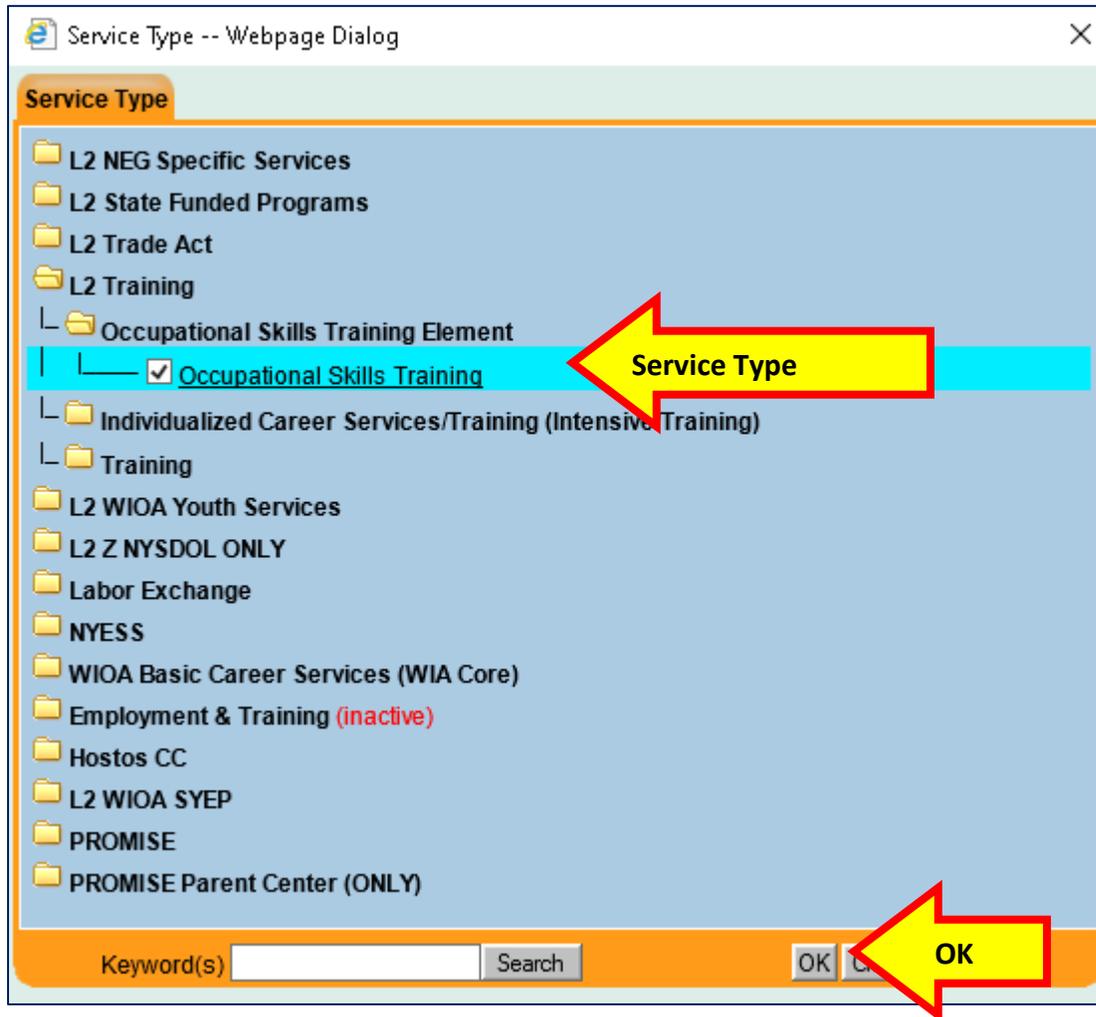


Verify the correct **WIB** is selected.

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

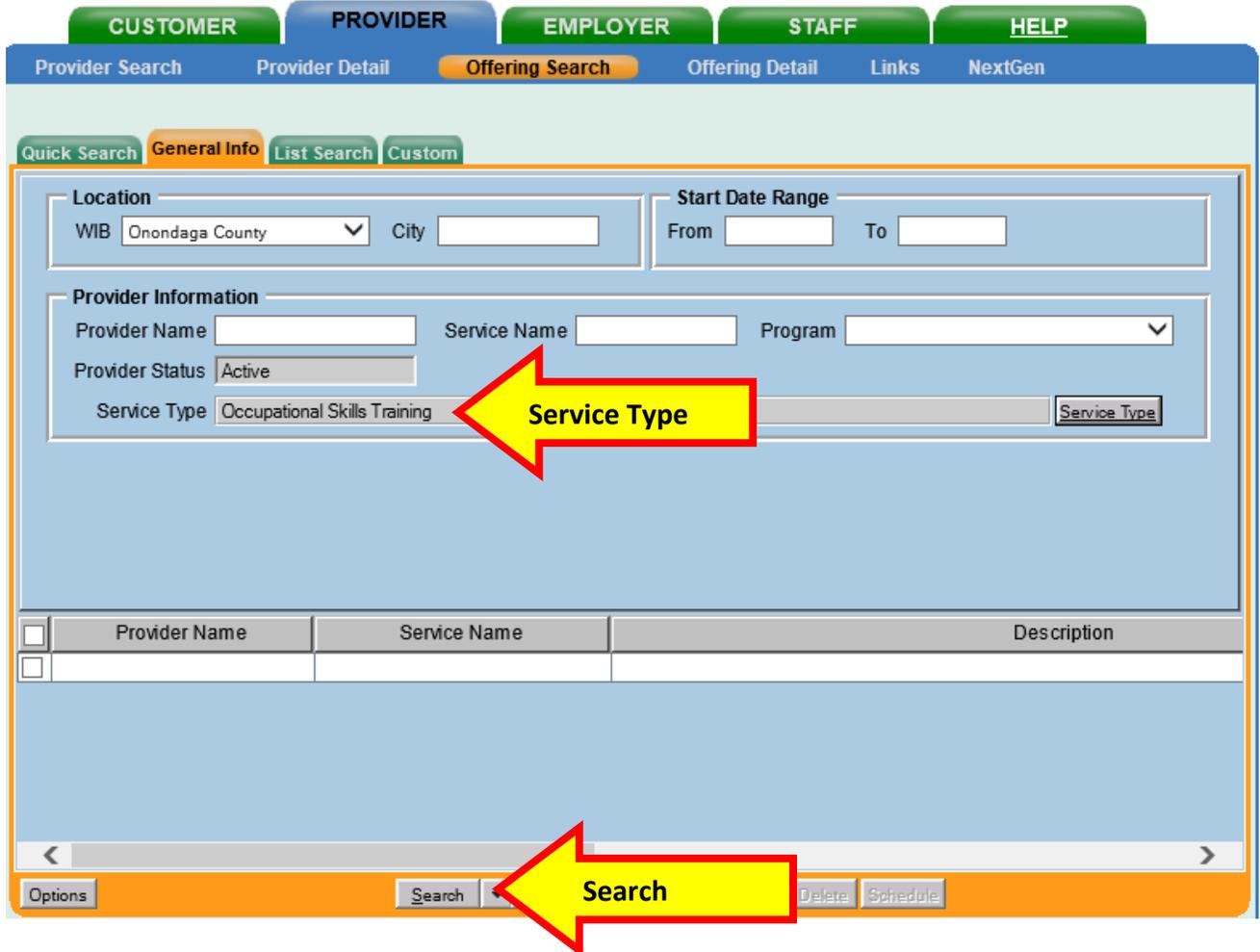


The screenshot displays the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (highlighted), Offering Detail, Links, and NextGen. The main content area includes a 'Quick Search' section with 'General Info', 'List Search', and 'Custom' options. The 'General Info' section contains a 'Location' field with a dropdown menu set to 'Onondaga County' and a 'City' input field, and a 'Start Date Range' field with 'From' and 'To' input fields. Below this is the 'Provider Information' section with 'Provider Name', 'Service Name', and 'Program' input fields. A 'Service Type -- Webpage Dialog' is open in the foreground, showing a list of service categories on the left and a 'Description' field on the right. A yellow arrow points to the 'Service Type' button in the dialog's header. The list of service types includes: L2 NEG Specific Services, L2 State Funded Programs, L2 Trade Act, L2 Training, L2 WIOA Youth Services, L2 Z NYSDOL ONLY, Labor Exchange, NYESS, WIOA Basic Career Services (WIA Core), Employment & Training (inactive), Hostos CC, L2 WIOA SYEP, PROMISE, and PROMISE Parent Center (ONLY).



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

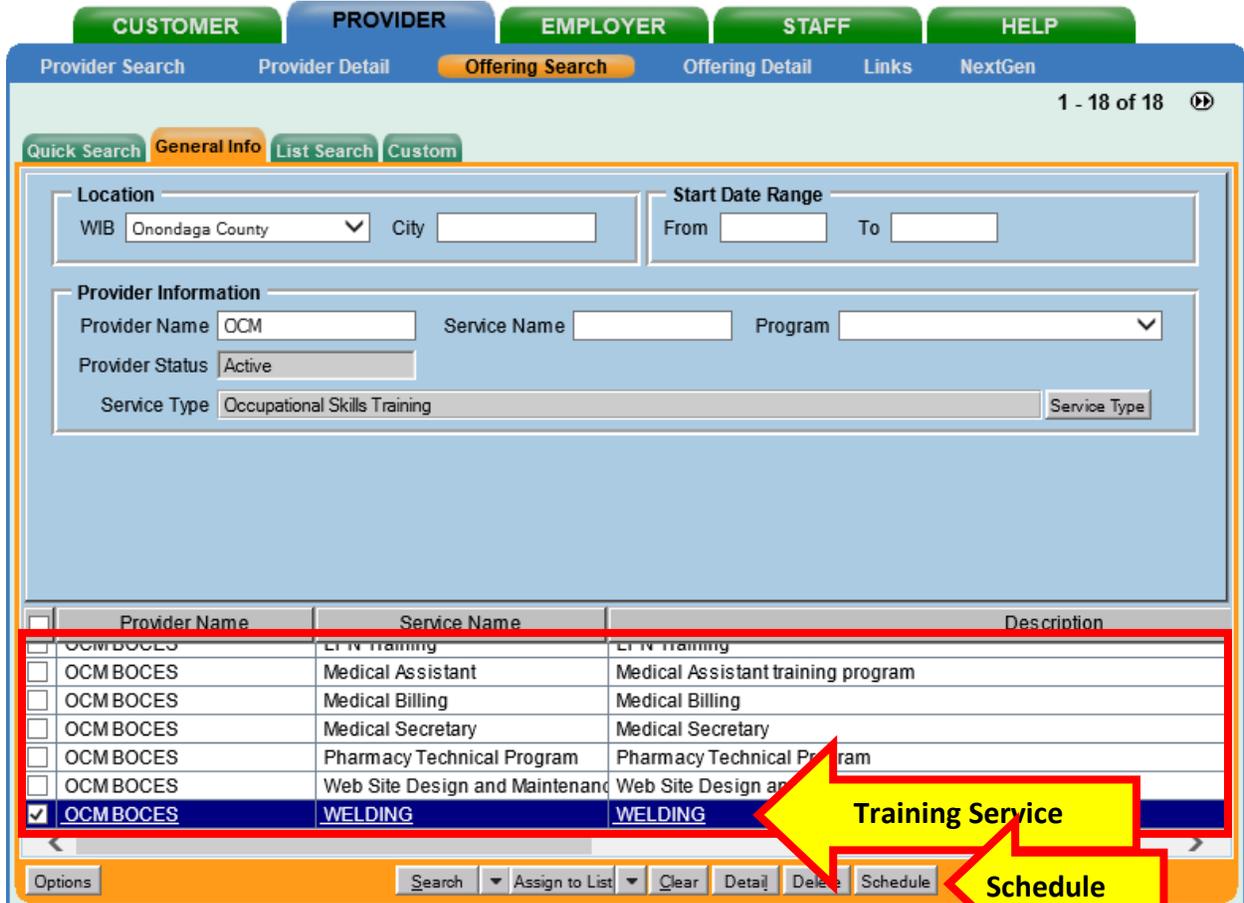
Once the **Service Type** is chosen, click **Search**.



The screenshot displays the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (highlighted), Offering Detail, Links, and NextGen. The main content area has sub-tabs: Quick Search, General Info (highlighted), List Search, and Custom. The 'Offering Search' form includes fields for Location (WIB Onondaga County, City), Start Date Range (From, To), Provider Information (Provider Name, Service Name, Program, Provider Status: Active), and Service Type (Occupational Skills Training). A yellow arrow points to the Service Type dropdown. Below the form is a table with columns: Provider Name, Service Name, and Description. At the bottom, there are buttons for Options, Search (highlighted with a yellow arrow), Delete, and Schedule.

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

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



1 - 18 of 18

Quick Search General Info List Search Custom

Location WIB Onondaga County City Start Date Range From To

Provider Information
 Provider Name OCM Service Name Program
 Provider Status Active
 Service Type Occupational Skills Training Service Type

<input type="checkbox"/>	Provider Name	Service Name	Description
<input type="checkbox"/>	OCMBOCES	LIW Training	LIW Training
<input type="checkbox"/>	OCMBOCES	Medical Assistant	Medical Assistant training program
<input type="checkbox"/>	OCMBOCES	Medical Billing	Medical Billing
<input type="checkbox"/>	OCMBOCES	Medical Secretary	Medical Secretary
<input type="checkbox"/>	OCMBOCES	Pharmacy Technical Program	Pharmacy Technical Program
<input type="checkbox"/>	OCMBOCES	Web Site Design and Maintenance	Web Site Design and Maintenance
<input checked="" type="checkbox"/>	OCMBOCES	WELDING	WELDING

Options Search Assign to List Clear Detail Delete Schedule

Training Service

Schedule



This brings you to the **Customer** module, **Services** window, **Services** tab. Select the Service using the check box in the far-left column.

Enter the following fields in the Detail section: **Plan Start Date, Plan End Date, and Actual Start Date**. If the service provided is ongoing, do not enter an **Actual End Date** until the service is complete. Instructions for closing a service are provided later in this guide. As a best practice, enter a **Next Contact Date** to follow-up. A reminder will show up in your Staff Inbox when it's time to review the Service.

Many services may be provided in one day. If this is the case, enter the same date in all four date fields and select the appropriate option on the **Completed Successfully** drop-down menu. If a training spans over a course of time beyond one day, then you will select **Completed Successfully** (yes/no) once the training has ended.

Customer | PROVIDER | EMPLOYER | STAFF | HELP

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

Parker, John | SSN: | OSOS ID: NY015147173

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

Detail

Service Name: WELDING
 Service Desc: WELDING
 Service ID: 143653
 Service Type: Occupational Skills Training
 Provider Name: OCM BOCES
 Location Name: OCM BOCES
 Provider ID: 54963 | Offering ID: 144195

Plan. Start Date: 02/01/2024 | Plan. End Date: 06/20/2024
 Actual Start Date: 02/01/2024 | Actual End Date:
 Completed Successfully:
 Next Contact Date: 04/01/2024
 Program Service Type: ITA-Training
 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 checked="" type="checkbox"/> OCM BOCES	WELDING	02/01/2024		ITA-Training

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

Save | Customer Detail | Comp Assess | Comments



Choose an appropriate **Program Service Type**. This will vary based on the service provided. If you are recording an occupational skills training, select **ITA-Training**. If you are recording an On-the-Job training, select **Non-ITA Training**. Other services will be recorded as either **Basic Career Services** (for example, assessment or career guidance) or **Individualized Career Services** (for example, supportive services.)

If you are recording a training service, select the **O*Net Title** which corresponds to the training. You will also need to indicate if the training is part-time (yes/no) and if the training is offered via distance learning (yes/no.)

Click the **Save** button.

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

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

Parker, John SSN: OSOS ID: NY015147173

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

Detail

Plan. Start Date 02/01/2024 Plan. End Date 06/20/2024
Actual Start Date 02/01/2024 Actual End Date
Completed Successfully
Next Contact Date 04/01/2024

Program Service Type ITA-Training

Part Time Learn. No Distance Learn. No
Program
Minimum Hours Number of Weeks

O*Net 51412200 Welding, Soldering, and Brazing Machin O*Net
NAICS NAICS
Min. Prog. Agreed
Achv. Objective
Staff Assigned Change

Funding

Level	Source	Obligated	Actual	Oblig #

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

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/> OCM BOCES	WELDING	02/01/2024		ITA-Training

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

Save **Save** Comp Assess Comments

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

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

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

Parker, John SSN: OSOS ID: NY015147173

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

Detail

Completed Successfully

Next Contact Date 04/01/2024

Program Service Type ITA-Training

Part Time Learn. No Distance Learn. No

Program

Minimum Hours Number of Weeks

O*Net 51412200 Welding, Soldering, and Brazing Machin O*Net

NAICS NAICS

Min. Prog. Agreed

Achv. Objective

Staff Assigned KLINE, REBECCA Change

WB Assigned Niagara County

Agency Department of Labor 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"/>	OCM BOCES	WELDING	02/01/2024		ITA-Training

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

Save Customer Detail **Comp Assess** Comments





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

Select the **Quest NDWG** funding.

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"/>	WB	WMOA Adult Local	2021	\$ 100000.00	
<input type="checkbox"/>	WB	WMOA Adult Local	2022	\$ 100000.00	
<input type="checkbox"/>	WB	WMOA Adult Local	2023	\$ 100000.00	
<input type="checkbox"/>	WB	WMOA Dislocated Worker Local	2022	\$ 99999.00	
<input type="checkbox"/>	WB	WMOA Dislocated Worker Local	2023	\$ 100000.00	
<input type="checkbox"/>	WB	WMOA Youth Local	2021	\$ 100000.00	
<input type="checkbox"/>	WB	WMOA Youth Local	2022	\$ 99998.00	
<input type="checkbox"/>	WB	WMOA Youth Local	2023	\$ 100000.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2021	\$ 99998.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2022	\$ 100000.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2021	\$ 100000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2022	\$ 100000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WB	Adult Statewide 15%	2021	\$ 99999.00	
<input type="checkbox"/>	WB	Adult Statewide 15%	2022	\$ 100000.00	
<input type="checkbox"/>	WB	Adult Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	State	DHP State Funded	2023	\$ 99992.00	
<input type="checkbox"/>	WB	Gun Violence Prevention Local Initiative	2020	\$ 99998.00	
<input checked="" type="checkbox"/>	WB	QUEST NDWG	2023	\$ 100000.00	NY20

Obligated Amount OR Obligated Percentage

WB
Office
Region



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

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

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

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

Parker, John SSN: OSOS ID: NY015147173

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

Detail

Completed Successfully Next Contact Date 04/01/2024 Program Service Type ITA-Training

Part Time Learn. No Distance Learn. No Program

Minimum Hours Number of Weeks

O*Net 51412200 Welding, Soldering, and Brazing Machin O*Net NAICS NAICS

Min. Prog. Agreed

Achv. Objective

Staff Assigned KLINE, REBECCA Change

WB Assigned Niagara County Agency Department of Labor Change

Funding

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WB	QUEST NDWG	\$ 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"/>	OCM BOCES	WELDING	02/01/2024	ITA-Training

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

Save Save Customer Detail Comp Assess Comments



CLOSING A SERVICE

It is important that an **Actual End Date** is added to a service when the service has ended. This is called closing the service. Funded services, other than Follow-Up Services, that remain open will prevent a customer from exiting their enrollment.

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

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

Parker, John **SSN:** **OSOS ID: NY015147173**

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

Detail		Funding				
Service Desc:	WELDING	Level	Source	Obligated	Actual	Oblig #
Service ID:	143653	<input checked="" type="checkbox"/>	QUEST NDWG	\$ 1.00	\$ 0.00	-
Service Type:	Occupational Skills Training					
Provider Name:	OCM BOCES					
Location Name:	OCM BOCES					
Provider ID:	54963					
Offering ID:	144195					
Plan. Start Date:	02/01/2024					
Plan. End Date:	06/20/2024					
Actual Start Date:	02/01/2024					
Actual End Date:						
Completed Successfully:	<input type="checkbox"/>					
Next Contact Date:	04/01/2024					
Program Service Type:	ITA-Training					
Part Time Learn.:	No					
Distance Learn.:	No					
Program:						
Total Funding		\$ 1.00		<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>		
Petition #						
RR Event #						
Incumbent Worker Training						

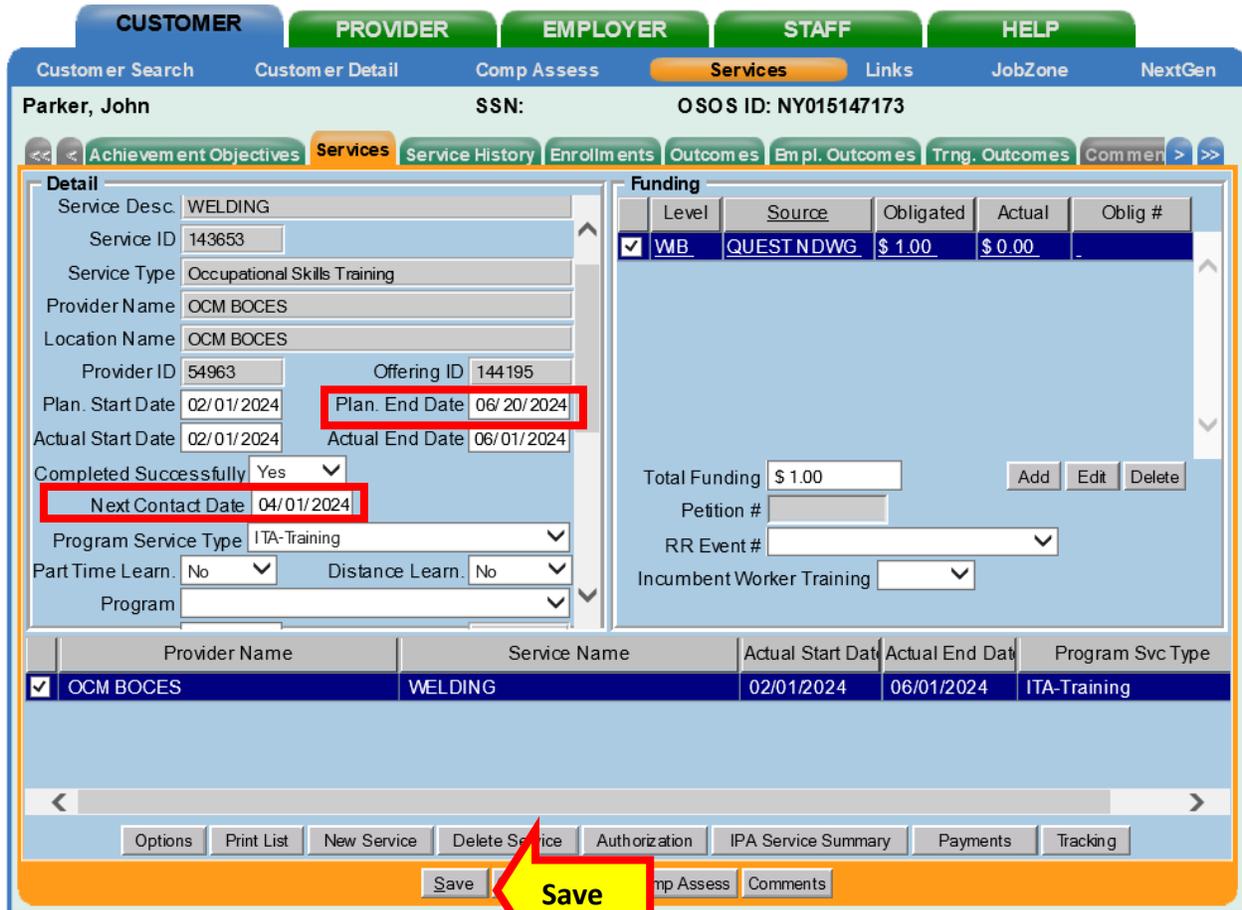
Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/> OCM BOCES	WELDING	02/01/2024		ITA-Training

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

Save Customer Detail Comp Assess Comments

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

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



CUSTOMER | PROVIDER | EMPLOYER | STAFF | HELP

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

Parker, John | SSN: | OSOS ID: NY015147173

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

Detail

Service Desc: WELDING

Service ID: 143653

Service Type: Occupational Skills Training

Provider Name: OCM BOCES

Location Name: OCM BOCES

Provider ID: 54963 | Offering ID: 144195

Plan. Start Date: 02/01/2024 | **Plan. End Date: 06/20/2024**

Actual Start Date: 02/01/2024 | Actual End Date: 06/01/2024

Completed Successfully: Yes

Next Contact Date: 04/01/2024

Program Service Type: ITA-Training

Part Time Learn.: No | Distance Learn.: No

Program:

Funding

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	W.B. QUEST NDWG	\$ 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"/>	OCM BOCES	WELDING	02/01/2024	06/01/2024	ITA-Training

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

Save | **Save** | Comp Assess | Comments



OUTCOMES

QUEST participants will be co-enrolled with WIOA and will be included in applicable Local Area Performance measures. Employment and training outcomes for QUEST NDWG grant participants must be recorded in the Employment Outcomes and Training Outcomes tabs of OSOS.

TRAINING OUTCOMES

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

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

The screenshot displays the 'Trng. Outcomes' tab in the OSOS system. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, there are sub-tabs for Customer Search, Customer Detail, Comp, Services, Links, JobZone, and NextGen. The main content area is titled 'Parker, John' and shows SSN: ***-**-3232 and OSOS ID: NY016747525. The 'Trng. Outcomes' tab is active, and a red arrow points to it from a yellow box labeled 'Trng. Outcomes'. The form contains several sections: 'Training/Education' with dropdowns for Category, Type, and Attainment Status, and input fields for Enrollment Date, Completion Date, Major/Program, Degree/Cert./Cred., School/Institute, and Seeker Service ID. There are also 'Created' and 'Last Modified' sections with Staff, Office, and Date fields. A table below the form has columns for Type, School/Institute, Enrollment Date, and Attainment Status, with a single row containing a checked checkbox. At the bottom, there are buttons for 'Add Outcome', 'Details', and 'Print List'. A red arrow points to the 'Add Outcome' button from a yellow box labeled 'Add Outcome'. Other buttons at the bottom include 'Save', 'Customer Detail', 'Comp', 'Assess', 'Comments', and 'Check Labor Market Information'.



Enter the **Category** and **Type** of the Credential being worked toward in training.

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

Enter the **Attainment Status** of "In Process - intended credential pending."

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

Click **Save**.

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

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

Parker, John SSN: OSOS ID: NY015147173

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

Training/Education

- Category: Occ Skills/Advanced Training
- Type: Occupational Certification
- Enroll Date: 02/01/2024 Completion Date: []
- Attainment Status: In Process - intended credential pending
- Leads to Cred./Empl.: []
- Major/Program: Welding
- Degree/Cert./Cred.: Certification
- School/Institute: OCM BOCES
- Seeker Service ID: [] [] Training Services

Created

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

Last Modified

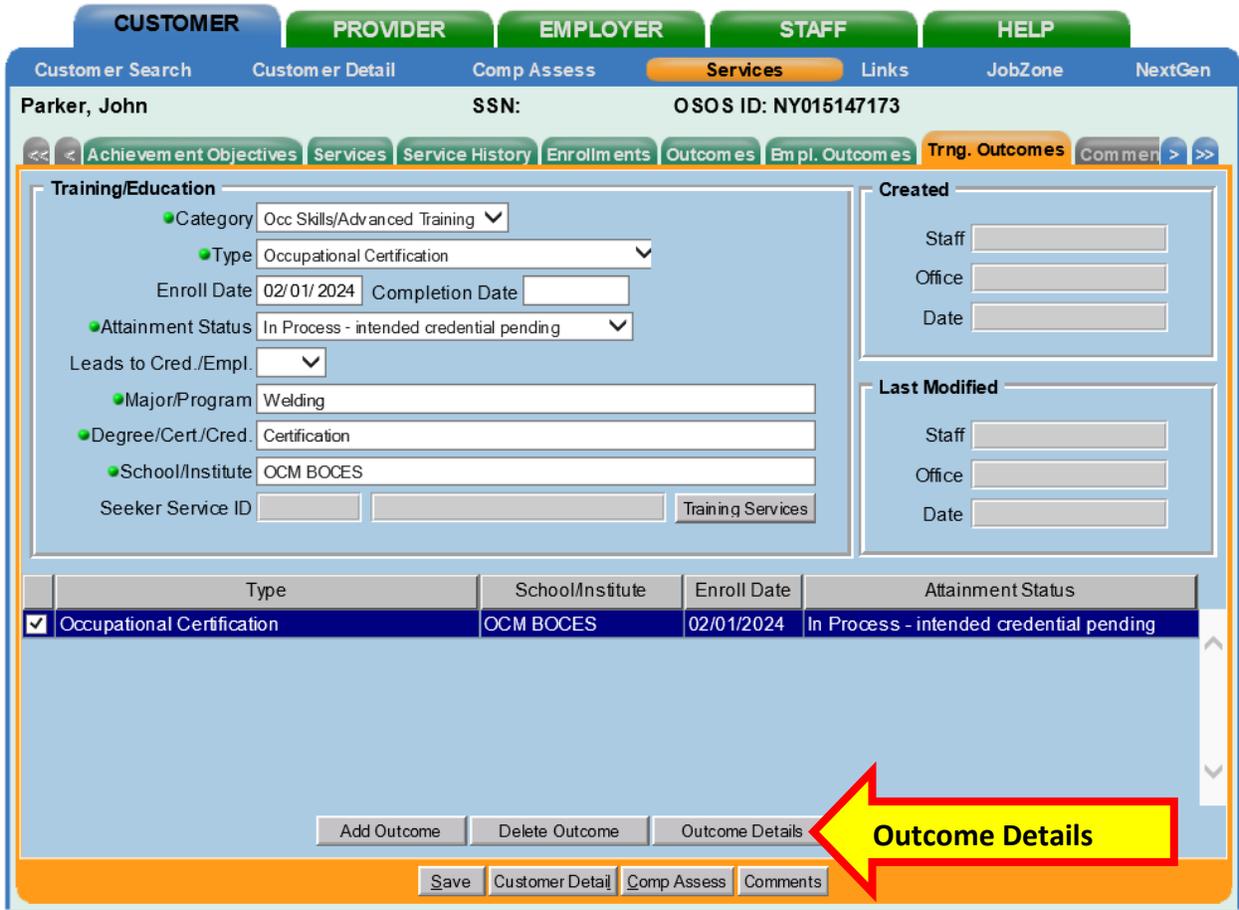
Staff: []
Office: []
Date: []

Type	School/Institute	Enroll Date	Attainment Status
<input checked="" type="checkbox"/> Occupational Certification	OCM BOCES	02/01/2024	In Process - intended credential pending

Add Outcome Delete Outcome Outcome Details Print List

Save **Save** [] Assess Comments

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



The screenshot shows the OSOS web application interface for a customer named Parker, John. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, there are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, JobZone, and NextGen. The main content area displays the customer's SSN and OSOS ID, along with a series of tabs: Achievement Objectives, Services, Service History, Enrollments, Outcomes, Empl. Outcomes, Trng. Outcomes, and Comments. The 'Trng. Outcomes' tab is active, showing a form for 'Training/Education' with fields for Category, Type, Enroll Date, Completion Date, Attainment Status, Leads to Cred./Empl., Major/Program, Degree/Cert./Cred., School/Institute, and Seeker Service ID. A table below the form lists training outcomes, with one entry selected: Occupational Certification at OCM BOCES, enrolled on 02/01/2024, with an attainment status of 'In Process - intended credential pending'. At the bottom of the form, there are buttons for 'Add Outcome', 'Delete Outcome', and 'Outcome Details'. A red arrow points to the 'Outcome Details' button, which is highlighted with a yellow box and the text 'Outcome Details'. Other buttons at the bottom include 'Save', 'Customer Detail', 'Comp Assess', and 'Comments'.



This will open up the **Training Outcome Details Webpage Dialog**.

Click **Add**.

Training Outcome Details -- Webpage Dialog

Training Outcome Details

Type

Enroll Date Completion Date

Effective Date Still Enrolled?

Hours Per Week Part Time Salary Salary Unit

Skill Gain

Type

Other Text

Contact Info

Date

Name

Role

Method

Attachment

Notes

	Effective Date	Still Enrolled?	Skill Gain Type
<input type="checkbox"/>			



Enter the **Effective Date** of the skill gain.

Select the **Type** of skill gain.

Use the **Other Text** field or the **Notes** field to provide additional information about the skill gain.

Click **Save**.

Training Outcome Details -- Webpage Dialog

Training Outcome Details

Type: Occupational Certification

Enroll Date: 02/01/2024 Completion Date: []

Effective Date: 03/01/2024 Still Enrolled?: Yes [v]

Hours Per Week: [] Part Time: [v] Salary: [] Salary Unit: [v]

Skill Gain

Type: Skills Progression [v]

Benchmark Exam: Other Skills Progression Benchmark or Exam [v]

Other Text: Passed first certification exam [x]

Contact Info

Date: []

Name: []

Role: [v]

Method: [v]

Attachment

Upload [] Download [] Delete []

Notes: [] Audi []

	Effective Date	Still Enrolled?	Skill Gain Type
<input checked="" type="checkbox"/>	03/01/2024	Yes	Skills Progression

Ok Cancel

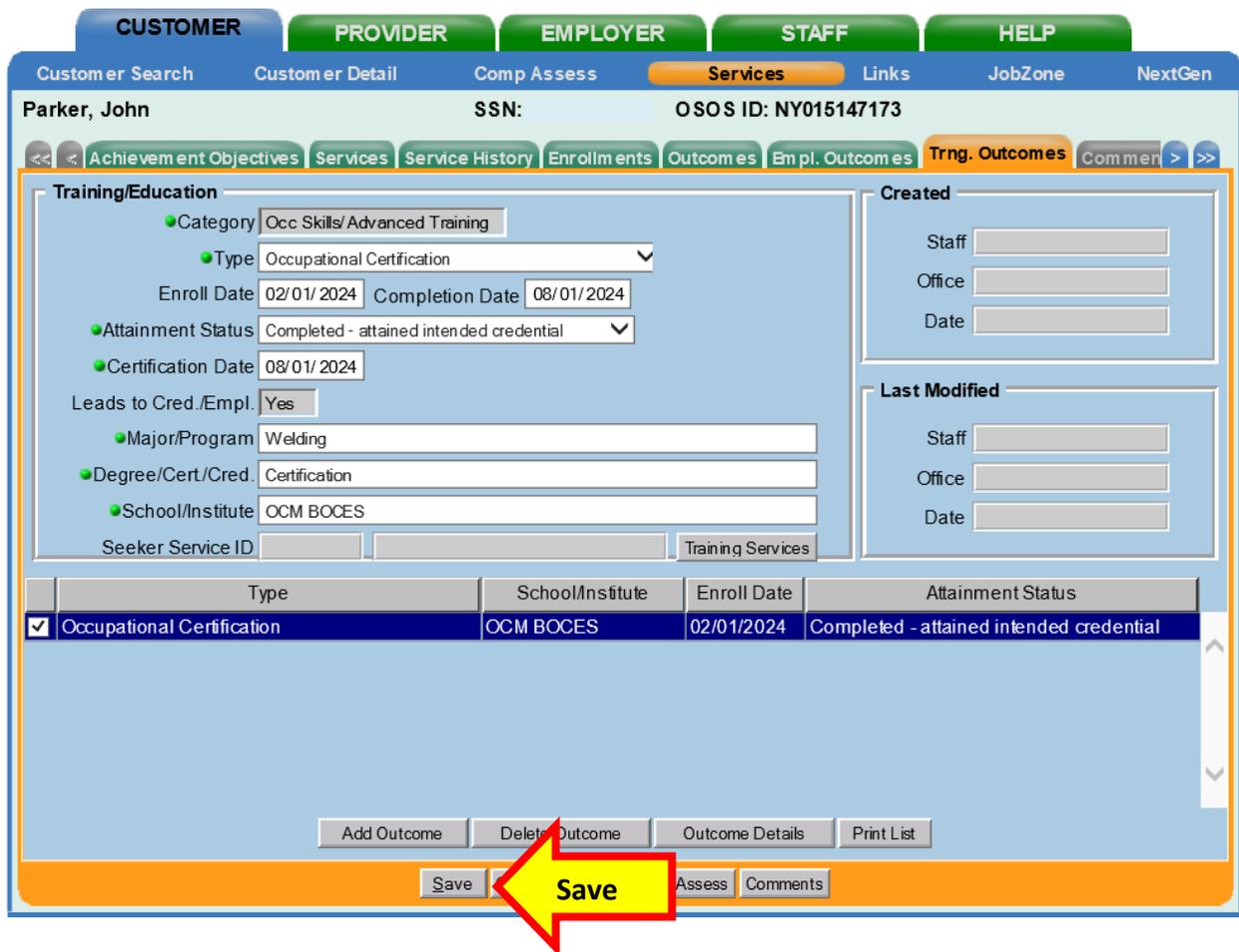
When the training has been completed, the **Training Outcome** must be ended.

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

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

Enter the **Certification Date** of the credential.

Click **Save**.



CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

Parker, John SSN: OSOS ID: NY015147173

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

Training/Education

- Category: Occ Skills/ Advanced Training
- Type: Occupational Certification
- Enroll Date: 02/01/2024 Completion Date: 08/01/2024
- Attainment Status: Completed - attained intended credential
- Certification Date: 08/01/2024
- Leads to Cred./Empl.: Yes
- Major/Program: Welding
- Degree/Cert./Cred.: Certification
- School/Institute: OCM BOCES
- Seeker Service ID: [] [] Training Services

Created

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

Last Modified

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

	Type	School/Institute	Enroll Date	Attainment Status
<input checked="" type="checkbox"/>	Occupational Certification	OCM BOCES	02/01/2024	Completed - attained intended credential

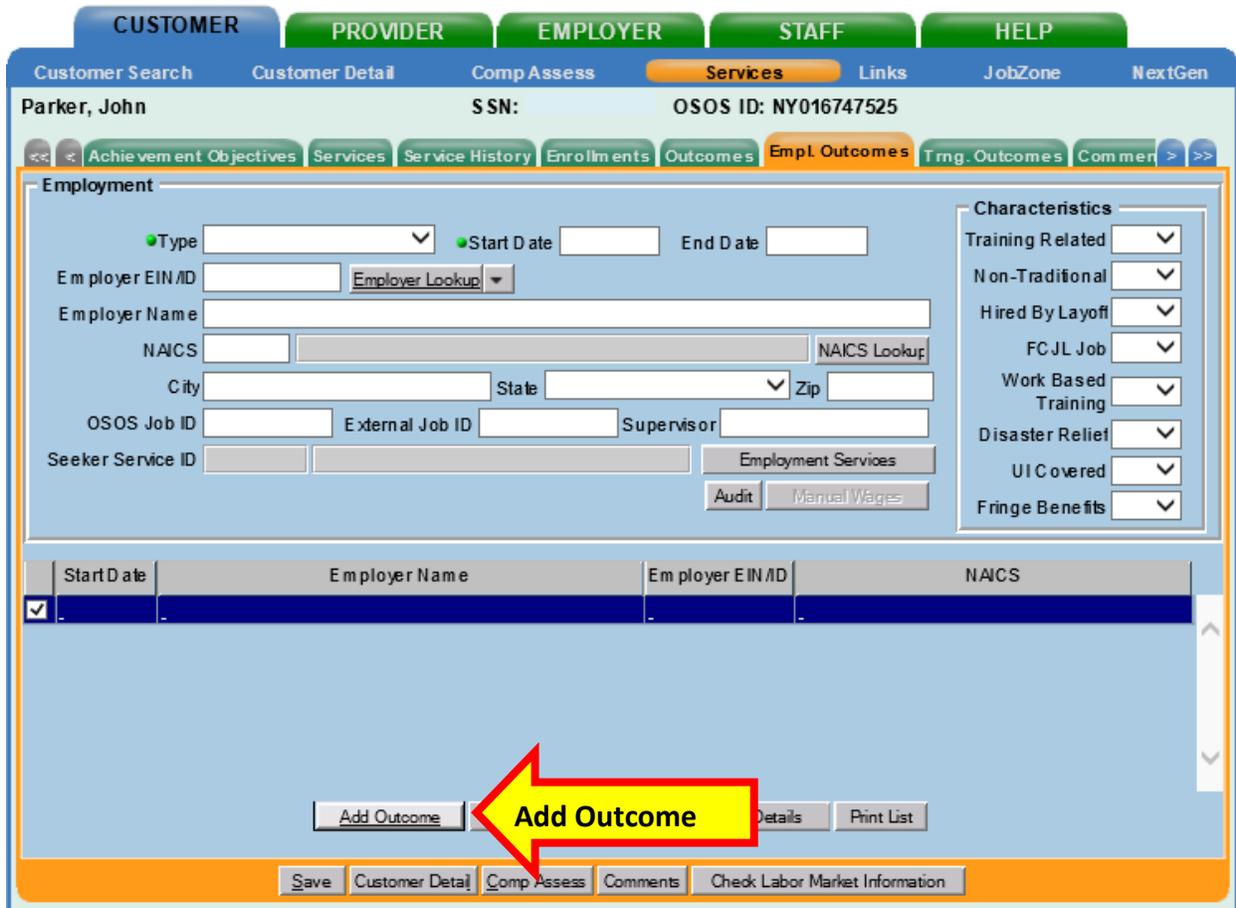
Add Outcome Delete Outcome Outcome Details Print List

Save **Save** Assess Comments

EMPLOYMENT OUTCOMES

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

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



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

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

Parker, John SSN: OSOS ID: NY016747525

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

Employment

Type Start Date End Date

Employer EIN/ID

Employer Name

NAICS

City State Zip

OSOS Job ID External Job ID Supervisor

Seeker Service ID

Characteristics

Training Related

Non-Traditional

Hired By Layoff

FCJL Job

Work Based Training

Disaster Relief

UI Covered

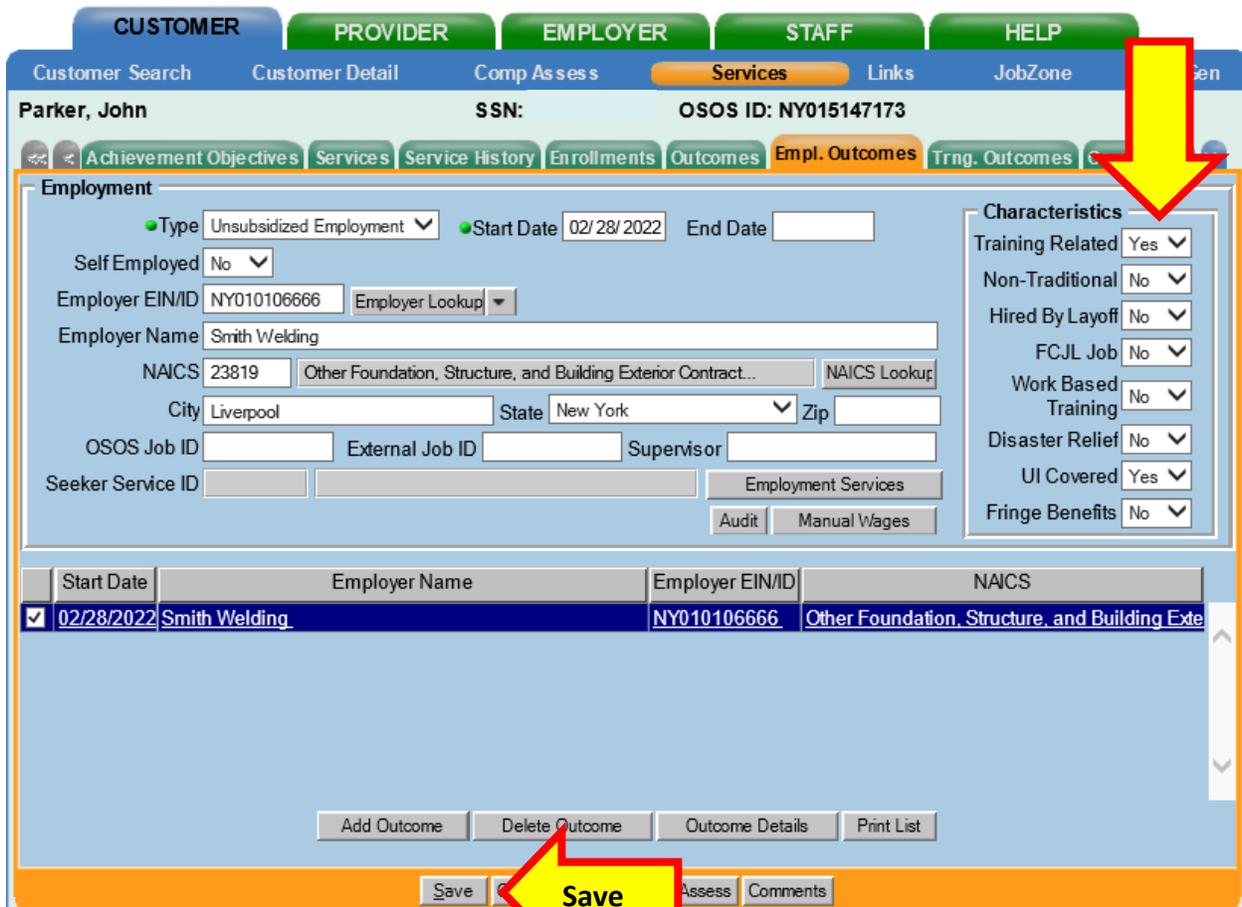
Fringe Benefits

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

Add Outcome

Required fields in this tab are **Type** and **Start Date**, but you should enter as much information as is known about the employment.

Please note the Characteristics section at the right of the screen. If the employment is related to training provided to the customer, remember to mark **Training Related** as **Yes**.



CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Asses **Services** Links JobZone Gen

Parker, John SSN: OSOS ID: NY015147173

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

Employment

Type: Unsubsidized Employment Start Date: 02/28/2022 End Date:

Self Employed: No

Employer EIN/ID: NY010106666 Employer Lookup

Employer Name: Smith Welding

NAICS: 23819 Other Foundation, Structure, and Building Exterior Contract... NAICS Lookup

City: Liverpool State: New York Zip:

OSOS Job ID: External Job ID: Supervisor:

Seeker Service ID: Employment Services:

Characteristics

Training Related: Yes

Non-Traditional: No

Hired By Layoff: No

FCJL Job: No

Work Based Training: No

Disaster Relief: No

UI Covered: Yes

Fringe Benefits: No

Start Date	Employer Name	Employer EIN/ID	NAICS
<input checked="" type="checkbox"/> 02/28/2022	Smith Welding	NY010106666	Other Foundation, Structure, and Building Exte

Add Outcome Delete Outcome Outcome Details Print List

Save **Save** Assess Comments

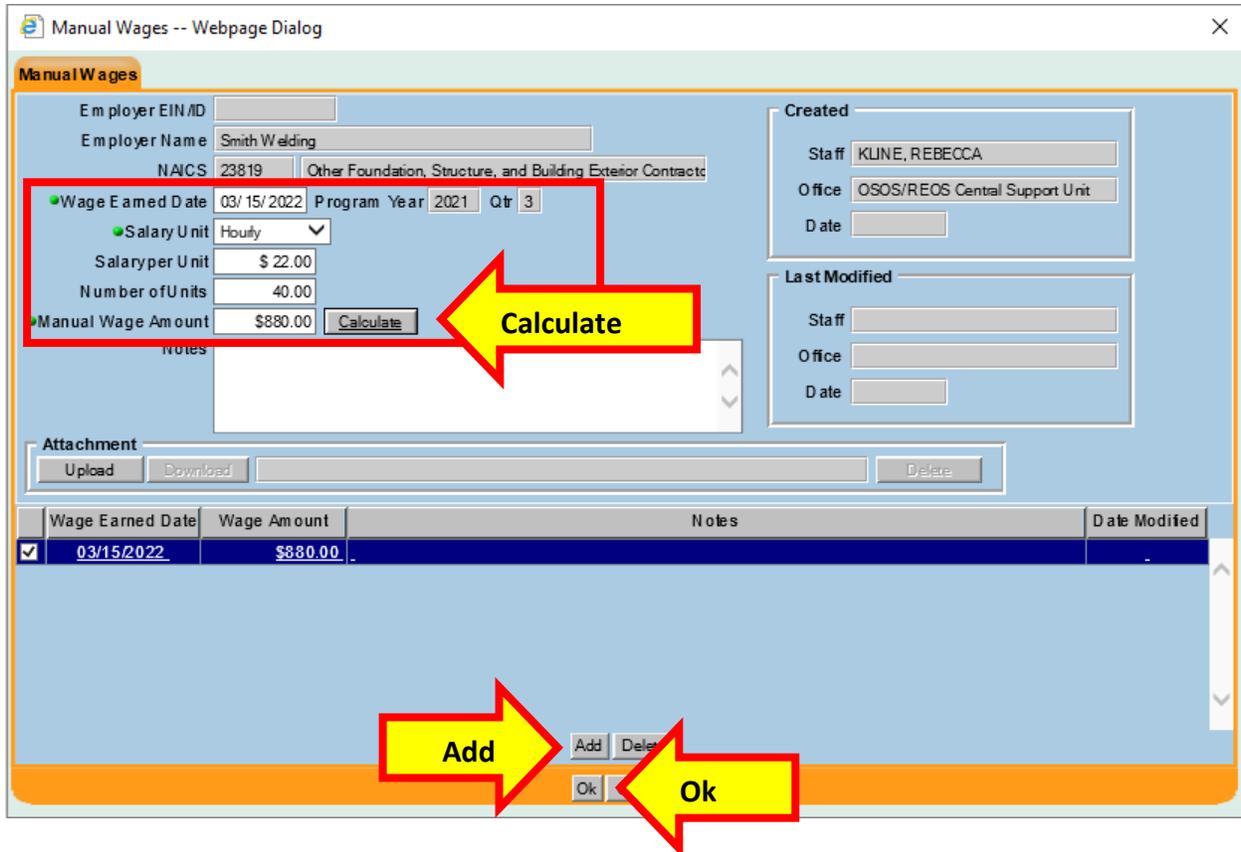


When the participant wages are known, they must be entered into OSOS.

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

The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Asses, Services, Links, JobZone, and NextGen. The main header displays 'SSN:' and 'OSOS ID: NY015147173'. A secondary set of tabs includes Achievement Objectives, Services, Service History, Enrollments, Outcomes, Empl. Outcomes (highlighted), Trng. Outcomes, and Commen. The 'Employment' section contains various input fields: Type (Unsubsidized Employment), Start Date (02/28/2022), End Date, Self Employed (No), Employer EIN/ID (NY010106666), Employer Name (Smith Welding), NAICS (23819), City (Liverpool), State (New York), Zip, OSOS Job ID, External Job ID, Supervisor, and Seeker Service ID. A 'Characteristics' sidebar on the right lists: Training Related (Yes), Non-Traditional (No), Hired By Layoff (No), FCJL Job (No), Work Based Training (No), Disaster Relief (No), and UI Covered (Yes). A red arrow points to the 'Manual Wages' button. Below the form is a table with columns: Start Date, Employer Name, Employer EIN/ID, and NAICS. The first row is checked and contains: 02/28/2022, Smith Welding, NY010106666, and Other Foundation, Structure, and Building Exte. At the bottom, there are buttons for Add Outcome, Delete Outcome, Outcome Details, Print List, Save, Customer Detail, Comp Assess, and Comments.

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



Manual Wages -- Webpage Dialog

Manual Wages

Employer EIN/ID:
 Employer Name: Smith Welding
 NAICS: 23819 Other Foundation, Structure, and Building Exterior Contract

Wage Earned Date: 03/15/2022 Program Year: 2021 Qtr: 3
 Salary Unit: Hourly
 Salary per Unit: \$ 22.00
 Number of Units: 40.00
 Manual Wage Amount: \$880.00

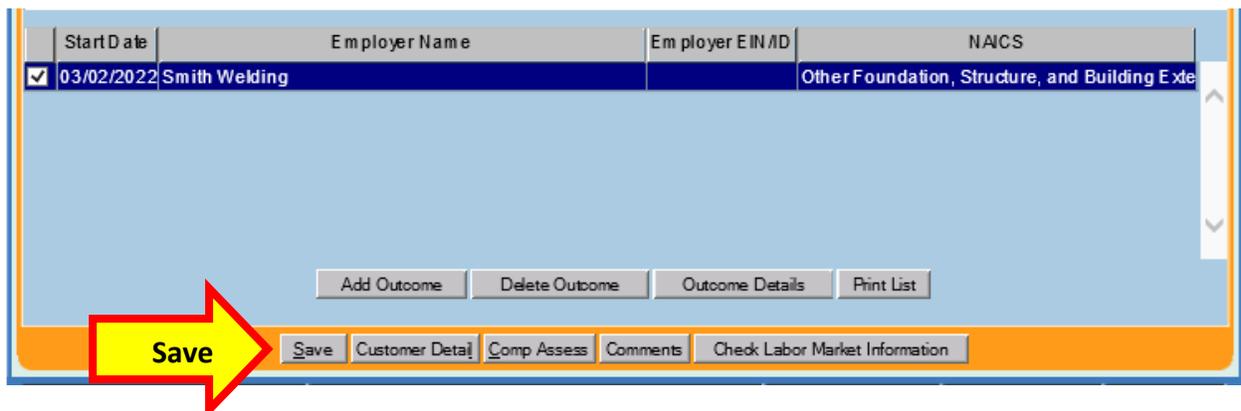
Created: Staff: KLINE, REBECCA
 Office: OSOS/REOS Central Support Unit
 Date:

Last Modified: Staff:
 Office:
 Date:

Attachment:

	Wage Earned Date	Wage Amount	Notes	Date Modified
<input checked="" type="checkbox"/>	03/15/2022	\$880.00		

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



	Start Date	Employer Name	Employer EIN/ID	NAICS
<input checked="" type="checkbox"/>	03/02/2022	Smith Welding		Other Foundation, Structure, and Building Exterior



RESOURCES AND ASSISTANCE

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

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

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