
**Sector Partnership
National Emergency
Grant - Incumbent
Worker Training
OSOS Guide**



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PURPOSE

The purpose of the Sector Partnership National Emergency Grant (SP-NEG) Incumbent Worker Training (IWT) is to promote partnerships between private sector businesses, Local Workforce Development Boards (LWDB), and education and training providers in priority industries as determined through the Regional Economic Development Council's strategic planning process. This grant will support and invest in businesses seeking to provide occupational skill based trainings to underemployed incumbent workers. These funds will assist participating businesses to advance their incumbent workers to more skilled positions leading to promotions, increased pay, or increased earnings through more work hours. Vacant positions, due to incumbent worker advancement, will then be back filled in accordance with a plan to engage and market to new, qualified participants in an associated dislocated worker program.

OSOS is a case management system designed to record a process in which services are provided to jobseekers and employers. This process must detail an assessment of a customer's situation as it pertains to their search for employment. It must then detail a specific plan of action set in place to provide these services and achieve defined goals. Lastly, the outcome of this plan must be documented in order to measure its success in achieving the desired goals.

This guide will provide detailed instructions on how to conduct the OSOS data entry for the SP - NEG IWT Initiative.

For additional information the SP-NEG IWT:

[Request for Applications - Sector Partnership-NEG Incumbent Worker Training](#)



PARTICIPANT DATA ENTRY

Under the Incumbent Worker Training grant, funds are to be used to assist businesses with the expense of providing occupational skills training for incumbent workers. Training may take the form of on-site training, off-site training, or distance learning.

The provision of this training must be recorded in OSOS.

RECORD THE SERVICE

After ensuring that the training provider information is in OSOS, staff must record participant data relevant to the services being provided.

Start by conducting a Customer Search in the **Customer** module, **Customer Search** window, and **Quick Search** tab.

Search for the customer by Last Name and First Name. Once you find the customer's record in OSOS you may use the customer's NY ID number for any subsequent customer search.

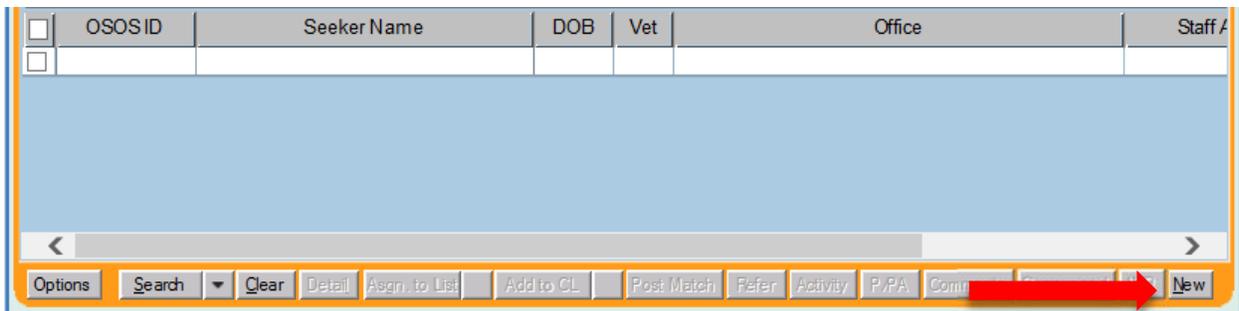
OSOS ID	Vet	Status	Seeker Name	CMSA



If a customer name search returns multiple records for the same customer, contact the OSOS help desk at help.osos@labor.ny.gov or 518-457-6586 to determine which record should be used.

If no matches are found, you will need to create a new record for the customer in OSOS, as incumbent workers served under this grant must be registered with NYS's Career Centers.

To do this, click **New** at the bottom of the screen and fill in the necessary details in the **Customer Detail** tabs.



<input type="checkbox"/>	OSOSID	Seeker Name	DOB	Vet	Office	Staff A
<input type="checkbox"/>						

Options Search Clear Detail Assign to List Add to CL Post Match Refer Activity P/PA Comm **New**



Once in the correct customer record, navigate to the **Services** (1) window and then the **Services** tab (2) of the customer record.

Click the **New Service** (3) button at the bottom.

1. Services

2. Services

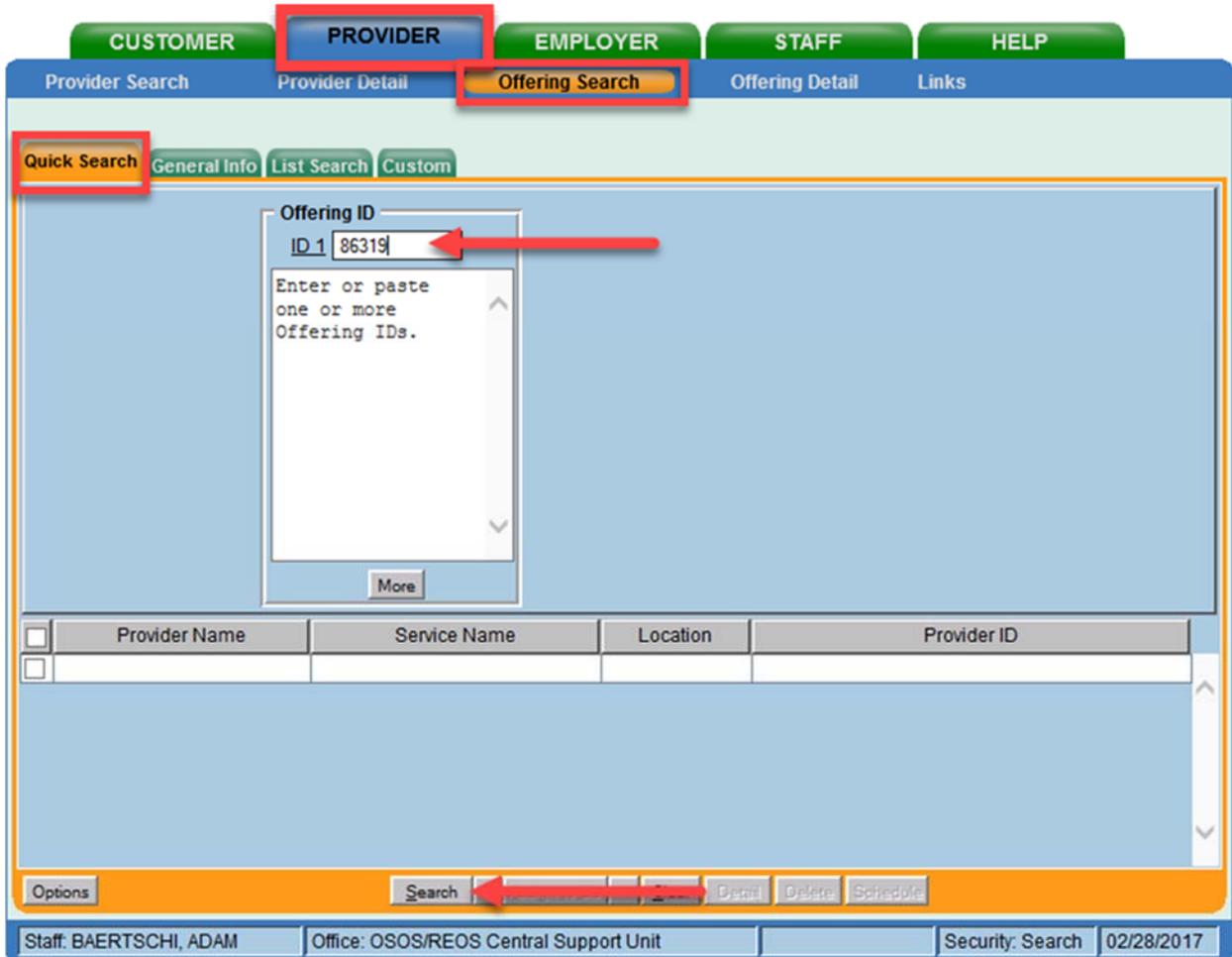
3. New Service

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/> State	WIA Self-Service	\$ 0.00	\$ 0.00	

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/> SS/IO Provider	SS/IO Provider Service	06/12/2014	06/12/2014	Basic Career Services
<input type="checkbox"/> Functional Alignment PY 2006	Assessment Interview, Initial Assessm	05/28/2014	05/28/2014	Basic Career Svcs - Sta
<input type="checkbox"/> Functional Alignment PY 2006	Workforce Information Svcs. Staff Assi	05/28/2014	05/28/2014	Basic Career Svcs - Sta
<input type="checkbox"/> SS/IO Provider	SS/IO Provider Service	08/15/2011	08/15/2011	Basic Career Services

After you click the **New Service** button, OSOS will automatically navigate to the **Provider** module. Within the **Provider** module, OSOS will start in the **Offering Search** window and the **Quick Search** tab.

If you know the **Offering ID** number, type it in the search box and click **Search**.



The screenshot shows the OSOS interface with the following elements:

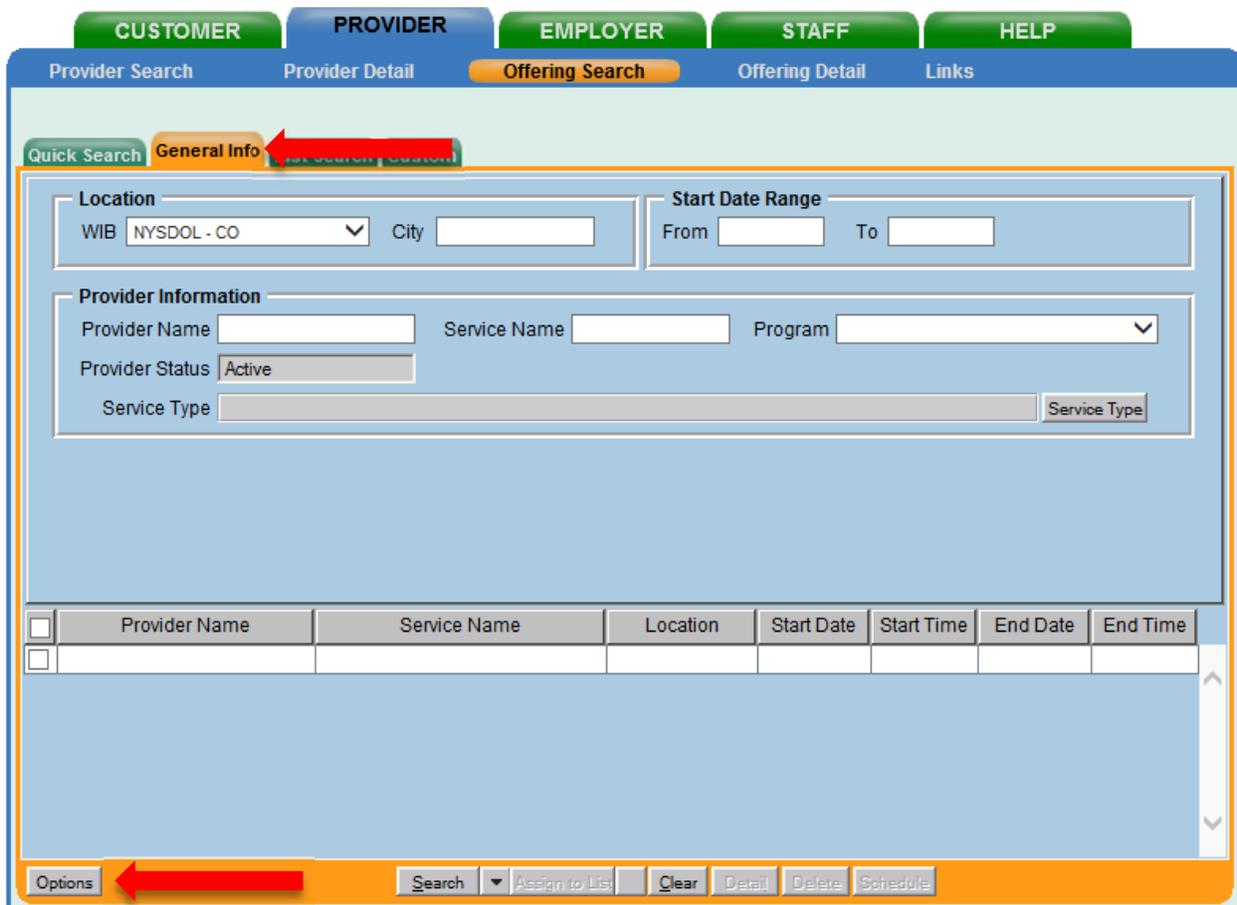
- Top navigation: CUSTOMER, **PROVIDER**, EMPLOYER, STAFF, HELP
- Sub-navigation: Provider Search, Provider Detail, **Offering Search**, Offering Detail, Links
- Search tabs: **Quick Search**, General Info, List Search, Custom
- Search input: Offering ID, ID 1 86319 (with a red arrow pointing to the input)
- Search instructions: Enter or paste one or more Offering IDs.
- Table headers: Provider Name, Service Name, Location, Provider ID
- Table content: One empty row with a checkbox on the left.
- Buttons: Options, **Search** (with a red arrow pointing to it), Cancel, Delete, Schedule
- Footer: Staff: BAERTSCHI, ADAM | Office: OSOS/REOS Central Support Unit | Security: Search | 02/28/2017

If you do not know the **Offering ID**, click the **General Info** tab to search by other criteria.

In order for Occupational Skills Training to be funded through the IWT grant, the training provider/service must have been auto-loaded into OSOS from the Eligible Training Provider List (ETPL).

To help you determine whether or not a particular provider has been auto-loaded from the ETP, the search options should be adjusted before conducting the search.

To do this, click on **Options** at the bottom of the screen.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (highlighted), Offering Detail, and Links. The main content area has two sub-tabs: Quick Search and General Info (highlighted with a red arrow). The General Info section contains several search criteria:

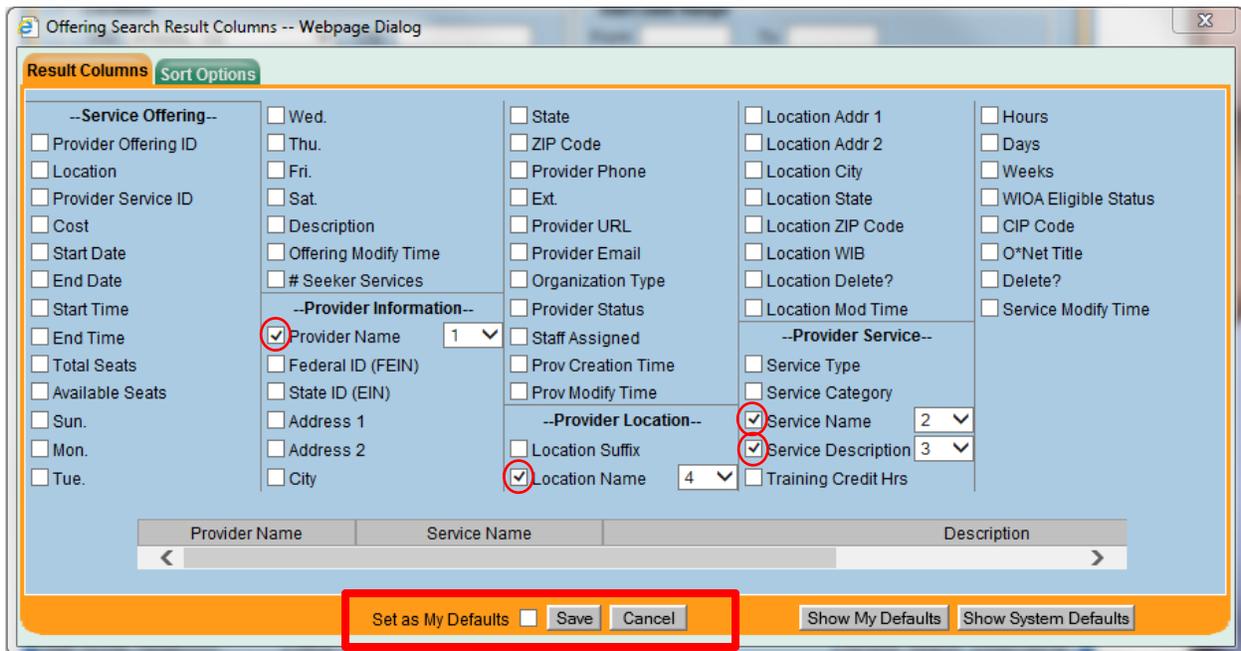
- Location:** WIB NYSDOL - CO (dropdown), City (text input), Start Date Range (From/To text inputs).
- Provider Information:** Provider Name (text input), Service Name (text input), Program (dropdown), Provider Status (Active dropdown), Service Type (text input).

Below the search criteria is a table with the following columns: Provider Name, Service Name, Location, Start Date, Start Time, End Date, End Time. The table is currently empty. At the bottom of the screen, there is an orange bar containing several buttons: Options (highlighted with a red arrow), Search (dropdown), Assign to List, Clear, Detail, Delete, and Schedule.

A pop-up window will appear containing a list of categories you can choose to display for your search results. Select the following four categories: Provider Name, Service Name, Location Name, and Service Description.

Uncheck any other categories that may already be checked and click **Save**.

Adding the Service Description to the search options is the key to allow you to easily determine ETPL origination.



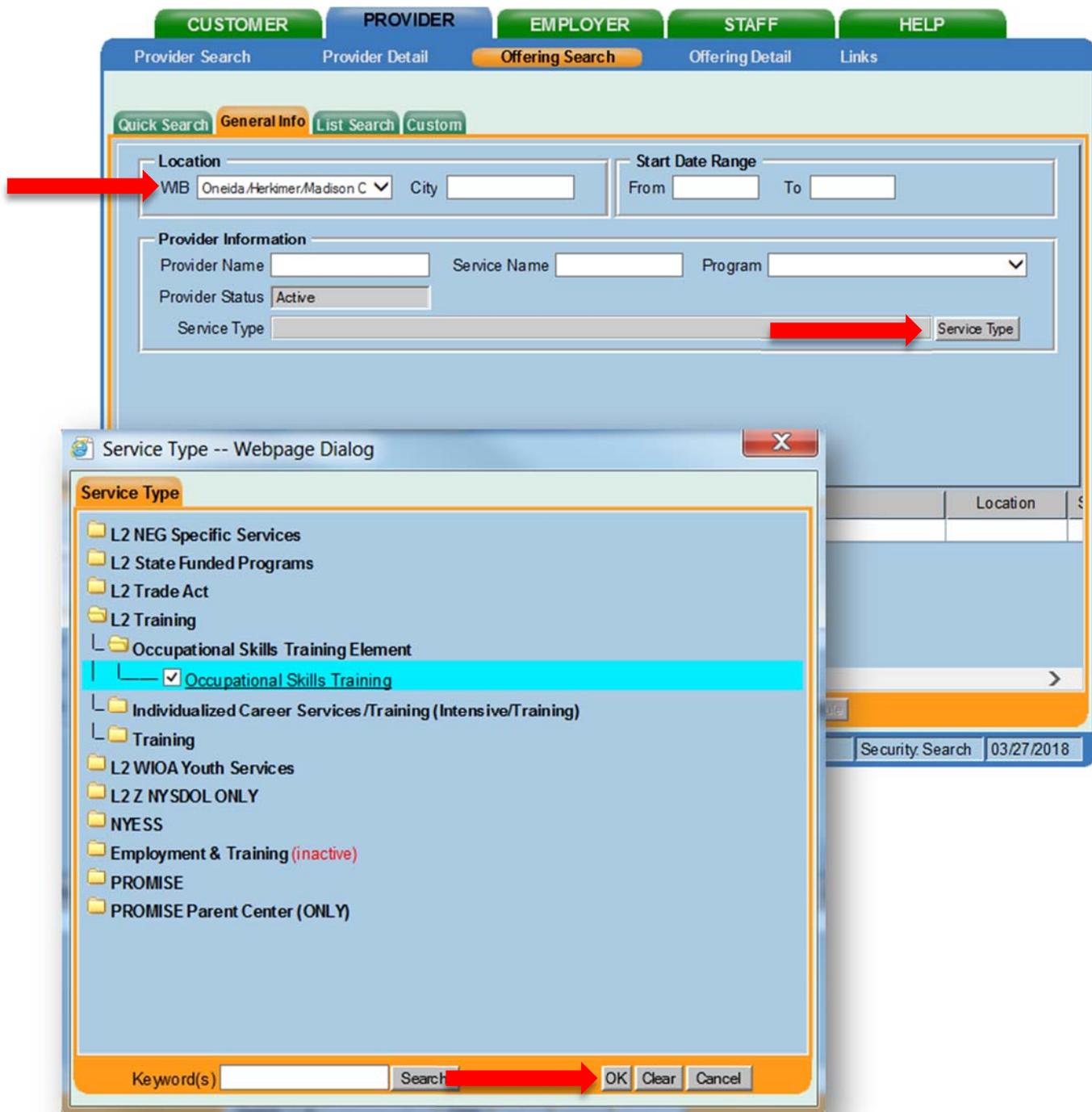

*You can check the box to “**Save My Defaults**” before you save so that you do not have to set these options each time you conduct a search.*

Now that the options have been customized, select the **WIB**.

Enter any known information in the available data fields. OSOS allows you to enter a partial name for the **Provider Name**, **Service Name** fields.

Click **Service Type**.

Select the appropriate Service Type from the pop-up dialog box. Click **OK**.



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, and Links. The main content area has sub-tabs: Quick Search, General Info (selected), List Search, and Custom. The 'General Info' section contains several input fields: 'Location' (with a dropdown menu showing 'WIB Oneida/Herkimer/Madison C' and a red arrow pointing to it), 'City', 'Start Date Range' (From and To), 'Provider Name', 'Service Name', 'Program' (dropdown), 'Provider Status' (set to 'Active'), and 'Service Type' (with a red arrow pointing to a 'Service Type' button). A 'Service Type -- Webpage Dialog' window is open in the foreground, showing a tree view of service categories. The 'Occupational Skills Training' option is selected and highlighted in blue. At the bottom of the dialog, there is a 'Keyword(s)' field, a 'Search' button (with a red arrow pointing to it), and 'OK', 'Clear', and 'Cancel' buttons. The background shows a table with columns for 'Location' and 'Security Search' (dated 03/27/2018).

Once the search criteria have been entered, click **Search**.

CUSTOMER **PROVIDER** EMPLOYER STAFF HELP

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

Quick Search **General Info** List Search Custom

Location
 WIB Oneida/Herkimer/Madison C City

Start Date Range
 From To

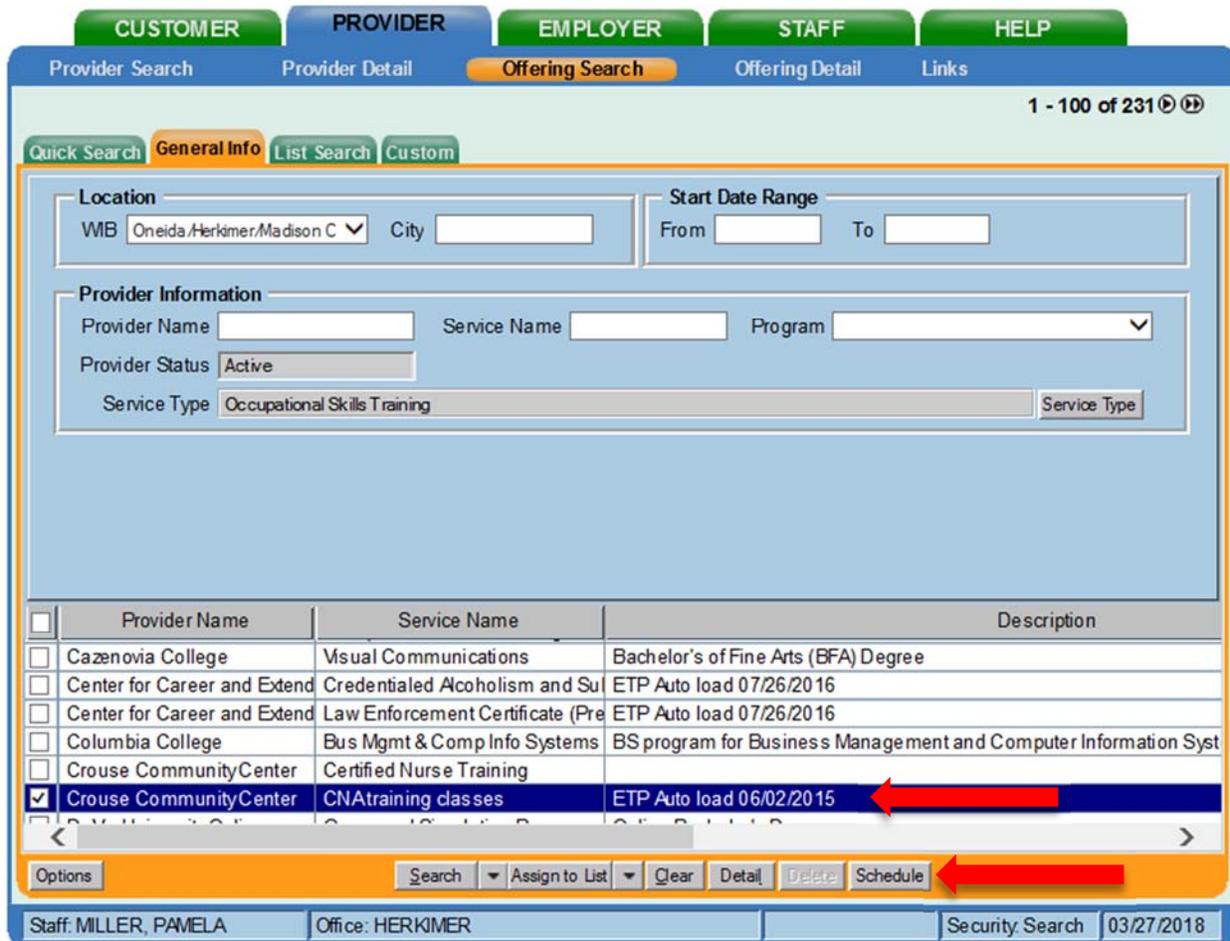
Provider Information
 Provider Name Service Name Program ▼
 Provider Status Active
 Service Type Occupational Skills Training Service Type

<input type="checkbox"/>	Provider Name	Service Name	Description
<input type="checkbox"/>			

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

The results will display in the bottom half of the screen. Note that the Description field will include "ETP Auto load" if the training has originated from the ETPL.

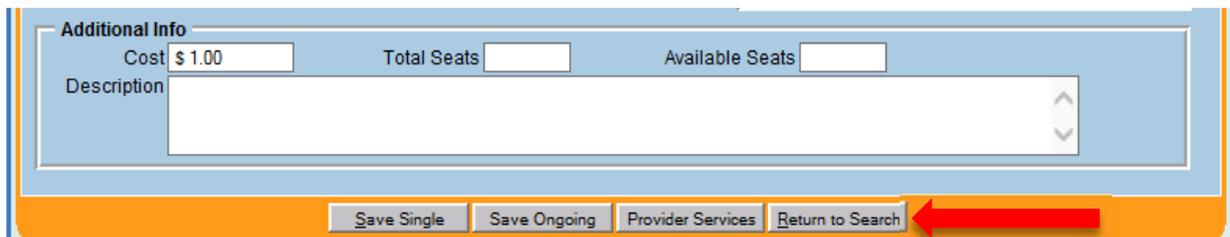
Select the correct Provider/Service from the results and click **Schedule**.



<input type="checkbox"/>	Provider Name	Service Name	Description
<input type="checkbox"/>	Cazenovia College	Visual Communications	Bachelor's of Fine Arts (BFA) Degree
<input type="checkbox"/>	Center for Career and Extend	Credentialed Alcoholism and Su	ETP Auto load 07/26/2016
<input type="checkbox"/>	Center for Career and Extend	Law Enforcement Certificate (Pre	ETP Auto load 07/26/2016
<input type="checkbox"/>	Columbia College	Bus Mgmt & Comp Info Systems	BS program for Business Management and Computer Information Syst
<input type="checkbox"/>	Crouse CommunityCenter	Certified Nurse Training	
<input checked="" type="checkbox"/>	Crouse CommunityCenter	CNAttraining classes	ETP Auto load 06/02/2015



*If your search only returns one result, OSOS will navigate directly to the **Offering Detail** window for that provider. Click the **Return to Search** button at the bottom of the screen to navigate back to the **General Info** tab. This will allow you to schedule the service.*





By clicking **Schedule**, the service will be added to the customer's record, under the **Services** tab. OSOS will navigate to the **Services** tab automatically.

Select the service from the list in the bottom half of the screen and complete the following data entry in the **Detail** window (left hand side).

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

Detail

Service Name: CNA training classes

Service Desc: ETP Auto load 06/02/2015

Service ID: 119092

Service Type: Occupational Skills Training

Provider Name: Crouse Community Center

Location Name: CNA Classes

Provider ID: 81064 Offering ID: 126811

Plan. Start Date: 03/27/2018 Plan. End Date: 04/27/2018

Actual Start Date: 03/27/2018 Actual End Date:

Completed Successfully:

Next Contact Date:

Program Service Type:

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 Description	Service Name	Actual Start Date
<input type="checkbox"/>	A-Tech Institute (removed from ETP list)	Accounting & Office Management	Accounting & Office Management	02/01/2018
<input type="checkbox"/>	Functional Alignment PY 2006	FA Staff Assisted Intensive	Career Guidance - Intensive	01/09/2018
<input type="checkbox"/>	Functional Alignment PY 2006	FA Staff Assisted Core	Assessment Interview, Initial Assessm	01/09/2018
<input type="checkbox"/>	Aesthetic Science Institute		zzzDNUzzzDual Paramedical/Laser	12/05/2017

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

Save Customer Detail Comp Assess Comments Check Labor Market Information

Staff: MILLER, PAMELA Office: HERKIMER Unsaved Changes Security Search 03/27/2018



Plan. Start Date – Enter the date on which the service is planned to begin.

Plan. End Date – Enter the date on which the service is planned to end. Enter the same date you entered for Plan. Start Date if it is a one day service.

Actual Start Date – Enter the date on which the service began

Actual End Date – This field can be left blank until the service ends. If the service is a one day service, enter the same date that you entered in the Actual Start Date field.

Next Contact Date – Enter a date on which to follow up with the participant. This date should be within 90 days of the first service to verify the program status and prevent the participant from exiting the enrollment.

Program Service Type – Select the appropriate program service type corresponding to the type of service.

O*NET – Enter the appropriate O*NET code. If you do not know the O*NET code, refer to [O*NET Titles in OSOS Guide](#).

Staff Assigned—Click the “**Change**” button to enter the staff assigned to this participant. You may choose the down arrow and select “Assign to Me” if you are the staff member assigned to this participant.

WIB Assigned, Agency, Office – These fields will auto load information attached to the service. If the information is incorrect, click the **Change Office** button to update.



*Depending on the type of service you enter, some of the fields in the **Detail** section will not apply. As a rule, provide as much known information about the service as possible.*

ADD FUNDING

Next, complete the **Funding** section (right hand side) for the service

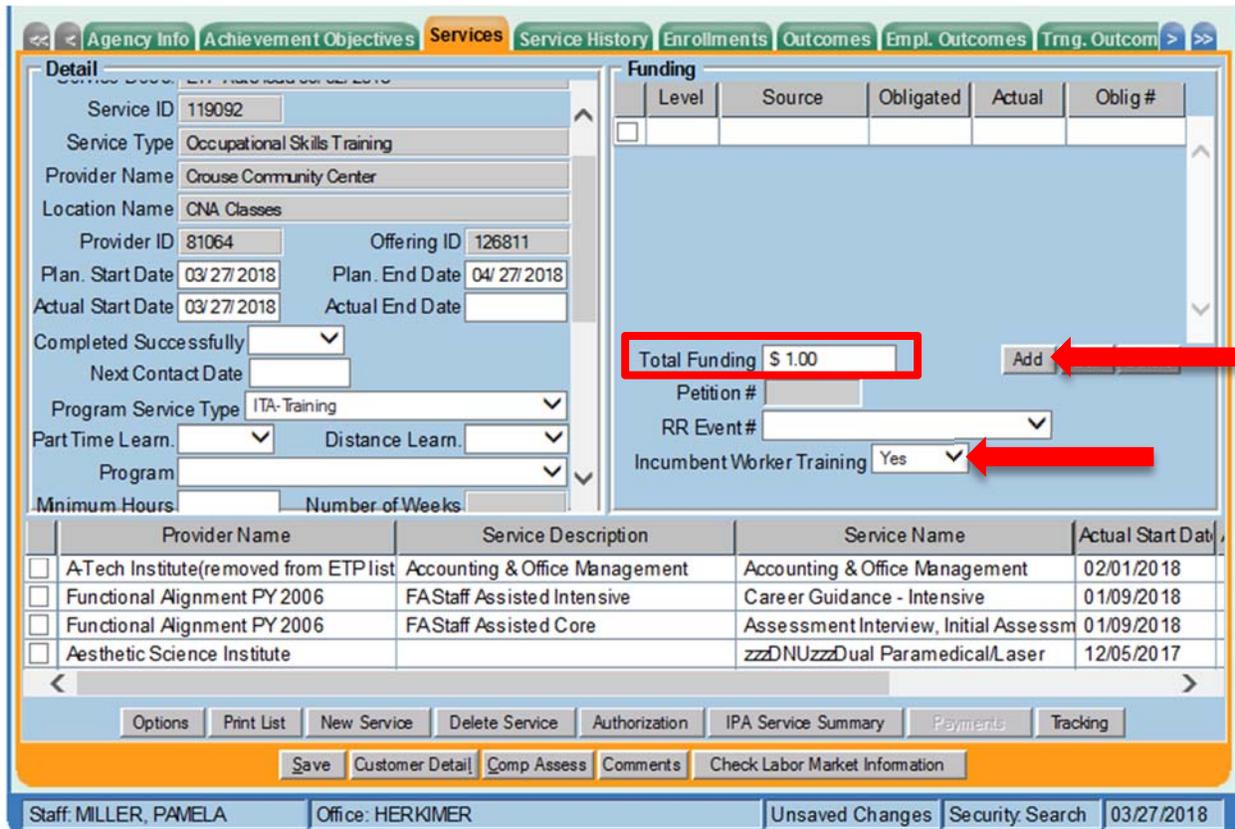
To do this, enter \$1.00 in the **Total Funding** field.

Select **Yes** from the **Incumbent Worker Training** drop-down menu.

Click the **Add** button.



OSOS does not track the actual financial side of this grant. For that reason, the \$1.00 entry acts as a placeholder so that the system will allow a funding source to be attached to the service.



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

- Service ID: 119092
- Service Type: Occupational Skills Training
- Provider Name: Crouse Community Center
- Location Name: CNA Classes
- Provider ID: 81064
- Offering ID: 126811
- Plan. Start Date: 03/27/2018
- Plan. End Date: 04/27/2018
- Actual Start Date: 03/27/2018
- Actual End Date: (empty)
- Completed Successfully: (dropdown arrow)
- Next Contact Date: (empty)
- Program Service Type: ITA- Training
- Part Time Learn.: (dropdown arrow)
- Distance Learn.: (dropdown arrow)
- Program: (dropdown arrow)
- Minimum Hours: (empty)
- Number of Weeks: (empty)

The 'Funding' section on the right contains the following fields:

- Total Funding: \$ 1.00 (highlighted with a red box)
- Add: (button, highlighted with a red arrow)
- Petition #: (empty)
- RR Event #: (dropdown arrow)
- Incumbent Worker Training: Yes (dropdown menu, highlighted with a red arrow)

Below the 'Funding' section is a table with the following columns: Provider Name, Service Description, Service Name, and Actual Start Date.

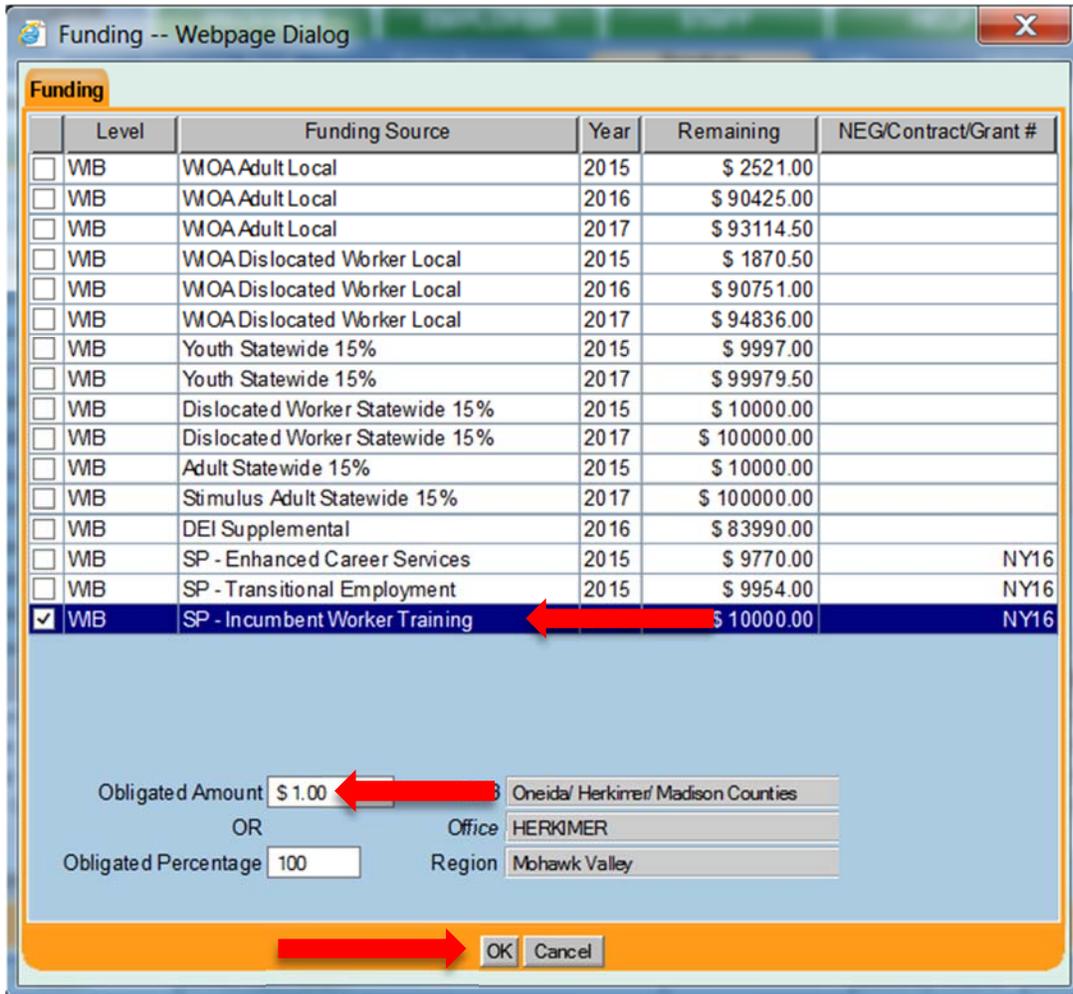
Provider Name	Service Description	Service Name	Actual Start Date
<input type="checkbox"/> ATech Institute (removed from ETP list)	Accounting & Office Management	Accounting & Office Management	02/01/2018
<input type="checkbox"/> Functional Alignment PY 2006	FA Staff Assisted Intensive	Career Guidance - Intensive	01/09/2018
<input type="checkbox"/> Functional Alignment PY 2006	FA Staff Assisted Core	Assessment Interview, Initial Assessment	01/09/2018
<input type="checkbox"/> Aesthetic Science Institute		zzzDNUzzzzDual Paramedical/Laser	12/05/2017

At the bottom of the interface, there are several buttons: Options, Print List, New Service, Delete Service, Authorization, IPA Service Summary, Payments, Tracking, Save, Customer Detail, Comp Assess, Comments, and Check Labor Market Information. The status bar at the very bottom shows: Staff: MILLER, PAMELA, Office: HERKIMER, Unsaved Changes, Security Search, 03/27/2018.

After you click **Add**, a pop up window will appear with a list of funding sources.

Check the box next to **SP - Incumbent Worker Training** to select that funding source.

Enter **\$1.00** in the **Obligated Amount** field and click **OK**.



Funding

	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	WB	WMOA Adult Local	2015	\$ 2521.00	
<input type="checkbox"/>	WB	WMOA Adult Local	2016	\$ 90425.00	
<input type="checkbox"/>	WB	WMOA Adult Local	2017	\$ 93114.50	
<input type="checkbox"/>	WB	WMOA Dislocated Worker Local	2015	\$ 1870.50	
<input type="checkbox"/>	WB	WMOA Dislocated Worker Local	2016	\$ 9075.100	
<input type="checkbox"/>	WB	WMOA Dislocated Worker Local	2017	\$ 94836.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2015	\$ 9997.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2017	\$ 99979.50	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2015	\$ 10000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	WB	Adult Statewide 15%	2015	\$ 10000.00	
<input type="checkbox"/>	WB	Stimulus Adult Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	WB	DEI Supplemental	2016	\$ 83990.00	
<input type="checkbox"/>	WB	SP - Enhanced Career Services	2015	\$ 9770.00	NY16
<input type="checkbox"/>	WB	SP - Transitional Employment	2015	\$ 9954.00	NY16
<input checked="" type="checkbox"/>	WB	SP - Incumbent Worker Training		\$ 10000.00	NY16

Obligated Amount: Oneida/ Herkimer/ Madison Counties

OR Office:

Obligated Percentage: Region:



The funding will now appear in the **Funding** section on the right-hand side.

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

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

Detail

Service ID: 119092

Service Type: Occupational Skills Training

Provider Name: Crouse Community Center

Location Name: CNA Classes

Provider ID: 81064 Offering ID: 126811

Plan. Start Date: 03/27/2018 Plan. End Date: 04/27/2018

Actual Start Date: 03/27/2018 Actual End Date:

Completed Successfully:

Next Contact Date:

Program Service Type: ITA-Training

Part Time Learn.: Distance Learn.:

Program:

Minimum Hours: Number of Weeks:

Funding

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WB	SP - Incumbent	\$ 1.00	\$ 0.00

Total Funding: \$ 1.00 Add Edit Delete

Petition #:

RR Event #:

Incumbent Worker Training: Yes

	Provider Name	Service Description	Service Name	Actual Start Date
<input type="checkbox"/>	ATech Institute(removed from ETP list)	Accounting & Office Management	Accounting & Office Management	02/01/2018
<input type="checkbox"/>	Functional Alignment PY 2006	FAStaff Assisted Intensive	Career Guidance - Intensive	01/09/2018
<input type="checkbox"/>	Functional Alignment PY 2006	FAStaff Assisted Core	Assessment Interview, Initial Assessm	01/09/2018
<input type="checkbox"/>	Aesthetic Science Institute		zzzDNUzzzDual ParamedicalLaser	12/05/2017

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

Save Customer Detail Comp Assess Comments Check Labor Market Information

Staff: MILLER, PAMELA Office: HERKIMER Unsaved Changes Security Search 03/27/2018



ENTER COMMENTS

Comments are used to record case management notes. All users should record comments, details about services, and case notes that concern the customer being served.

Click on the **Comments** button at the bottom of the **Customer Detail** window. The **Comment Webpage Dialog** box will appear. Enter the comment and click the **Save** button on the Webpage Dialog box.

The comment will then appear listed on the **Comments** tab next to the date the comment was entered. Remember to save the entire customer record when you are finished entering comments.

The screenshot displays the OSOS Customer Detail window for Pamela H. Miller. The window has tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The Customer Detail tab is active, showing a navigation bar with buttons for Gen. Info, Eligibility, Add'l Info, Pgms/PA, Objective, Work Hist., Ed/Lic, Skills, Saved Searches, Active, and Comments. The Comments button is highlighted with a red arrow. Below the navigation bar is a table with columns for Created, Staff Assigned, and Comments. The table contains two rows of data. A dialog box titled 'Comment -- Webpage Dialog' is open, showing a text area for entering a comment and buttons for Save, Spell Check, and Cancel. A red arrow points to the Save button in the dialog box. At the bottom of the window, a navigation bar contains buttons for Save, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Sroh, Comments, Tag, Resume, Sched, and Message. A red arrow points to the Save button in this bar.

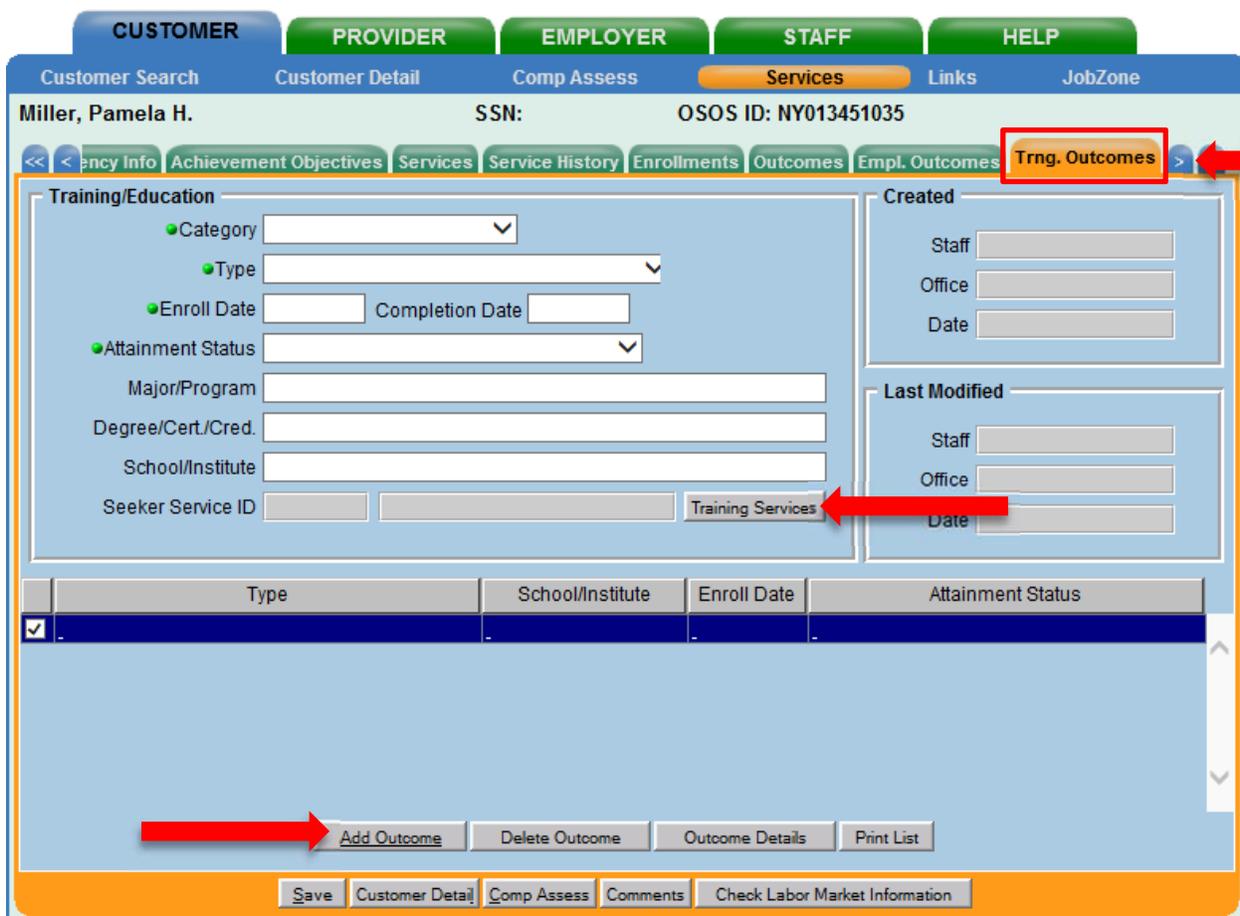
Created	Staff Assigned	Comments
		CASE NOTES CAN BE ENTERED AS COMMENTS
11/03/2017	VITAGLIANO, MICHELE	COMMENTS CAN COMMUNICATE A NARRATIVE OF SERVICES PROVIDED AND SERVICE-RELATED INFORMATION. PERSONAL AND OR SENSITIVE INFORMATION SHOULD NOT BE ENTERED AS A COMMENT.

ENTER OUTCOMES

When a customer exits an enrollment (90 days after the last recorded enrolling service or activity), you must enter a training/service outcome. To enter the outcome, navigate to the **Services** window of the **CUSTOMER** module. Click on the single right arrow until the display window shows the **Trng. Outcomes** tab.

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

Then click on the **Training Services** button.



CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

Miller, Pamela H. SSN: OSOS ID: NY013451035

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

Training/Education

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

Created

Staff
Office
Date

Last Modified

Staff
Office
Date

Training Services

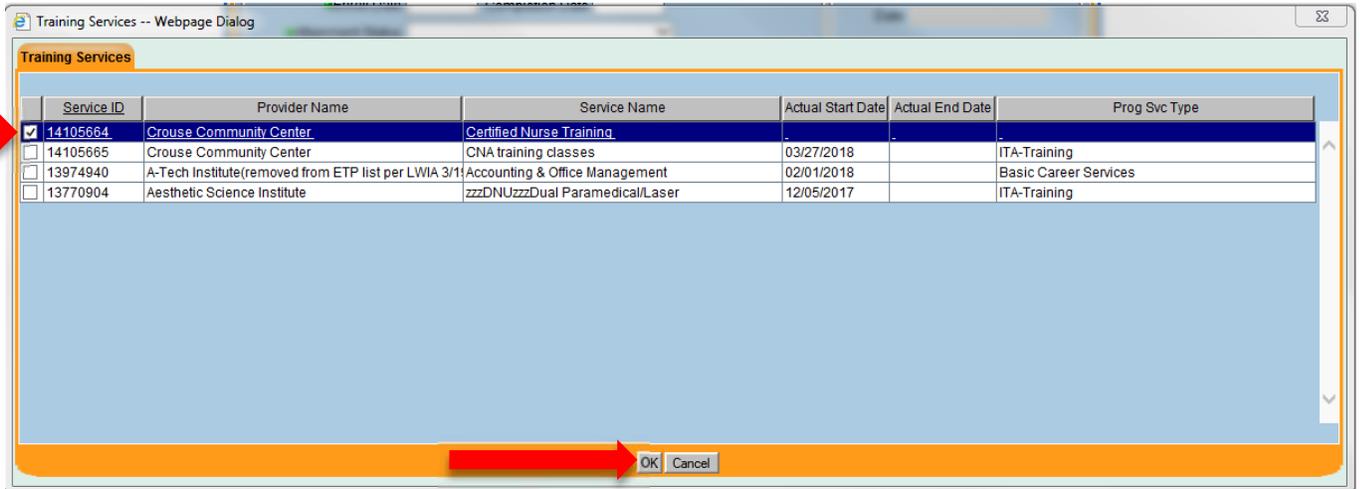
Type	School/Institute	Enroll Date	Attainment Status
<input checked="" type="checkbox"/>			

Add Outcome Delete Outcome Outcome Details Print List

Save Customer Detail Comp Assess Comments Check Labor Market Information

From the Training Services dialog box, select the SP-NEG funded service.

Click **OK**.



This will populate the Seeker Service ID in the Training Outcomes tab.



Select **Occ Skills/ Advanced Training** from the **Category** drop-down menu.

Select the appropriate credential type from the **Type** drop-down menu.

Enter the **Enroll Date** for the training.

Select the appropriate status from the **Attainment Status** drop-down menu.

If additional information is known, it should be entered in the remaining fields.

Click **Save**.

For additional information on entering outcomes, please see [OSOS Resources and Guides](#).

The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services (highlighted), Links, and JobZone. The user information is displayed as Miller, Pamela H. with SSN: and OSOS ID: NY013451035. A secondary set of tabs includes Agency Info, Achievement Objectives, Services, Service History, Enrollments, Outcomes, Empl. Outcomes, and Trng. Outcomes (highlighted). The main form is titled "Training/Education" and contains several fields: Category (dropdown menu with "Occ Skills/Advanced Training" selected), Type (dropdown menu), Enroll Date (text input), Completion Date (text input), Attainment Status (dropdown menu), Major/Program (text input), Degree/Cert./Cred. (text input), School/Institute (text input), and Seeker Service ID (text input with value "14105664"). To the right of the form are sections for "Created" and "Last Modified", each with fields for Staff, Office, and Date. Below the form is a table with columns: Type, School/Institute, Enroll Date, and Attainment Status. The table has one row with a checkmark in the first column. At the bottom of the form are buttons: Add Outcome, Delete Outcome, Outcome Details, and Print List. At the very bottom of the page are navigation buttons: Save (highlighted with a red arrow), Customer Detail, Comp Assess, Comments, and Check Labor Market Information.



RESOURCES AND ASSISTANCE

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

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

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

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