

**Sector Partnership
National Emergency
Grant - Work Based
Training Initiative
OSOS Guide**



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PURPOSE

The purpose of the Sector Partnership National Emergency Grant Work-Based Training Initiative (SP -NEG WBT Initiative) is to promote partnerships between private sector businesses, Local Workforce Development Boards (LWDBs), and education and training providers in priority industries as determined through the Regional Economic Development Council's strategic planning process. It will support and invest in businesses seeking to empower dislocated workers to reconnect to the workforce through work-based training opportunities. Funds will support businesses that provide work-based training programs, such as on-the-job training (OJT), apprenticeships, or unpaid occupational skill based training to dislocated workers seeking employment in priority industries.

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 WBT Initiative. It will cover data entry for the service provider, as well as data entry for the participant.

For additional information the SP-NEG WBT Initiative:

[SP-NEG WBT Questions and Answers Pertaining to the Request for Applications](#)

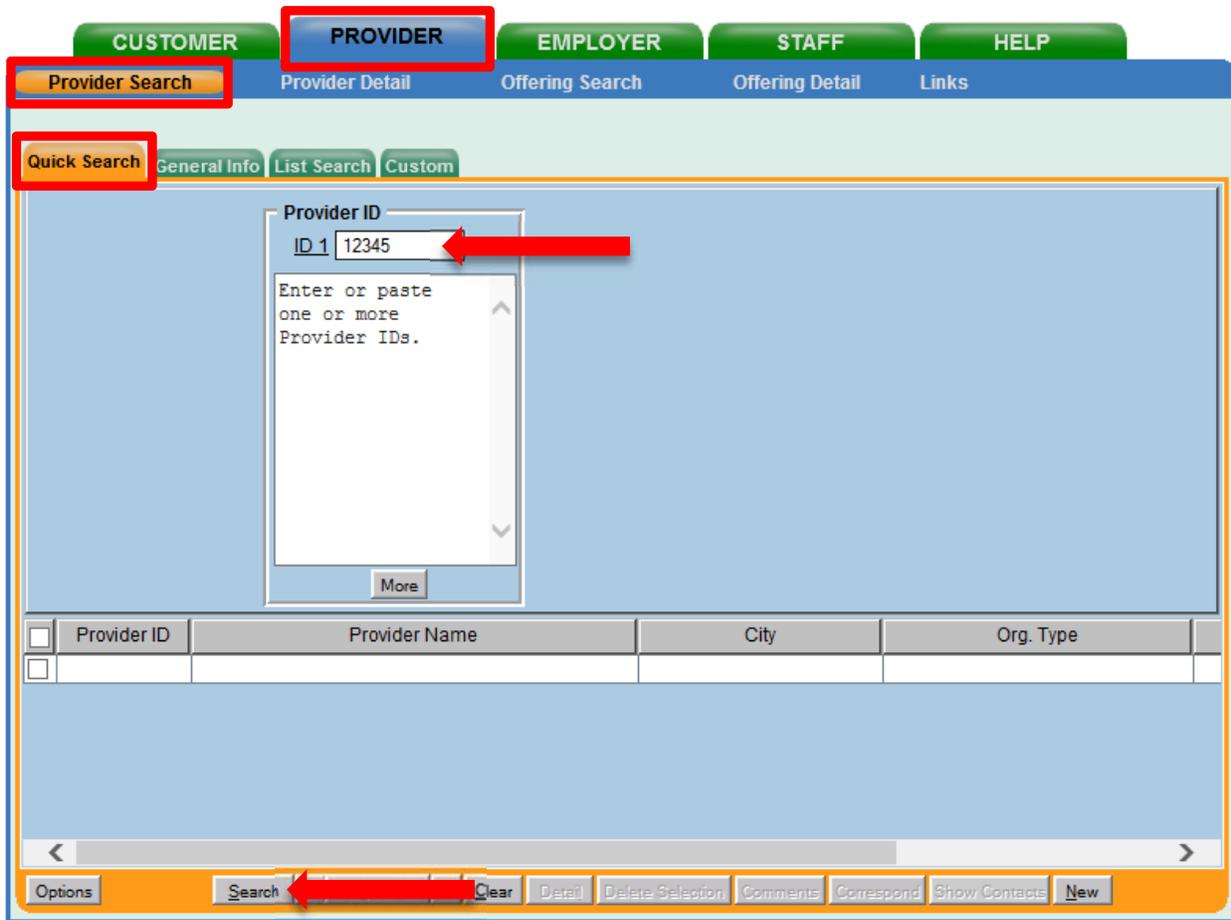
[Request for Applications - Sector Partnership-NEG Work-Based Training Initiative](#)

PROVIDER DATA ENTRY

In order to record the provision of training programs in OSOS, there must first be a provider record. Some providers may already have a provider record in OSOS, having been auto-loaded from the Eligible Training Provider List (ETPL). If the provider is not already listed, the local area must create the provider record in OSOS.

CREATING A PROVIDER RECORD

Before creating a new provider record, search OSOS to see if a record already exists for that provider. To do this, navigate to the **Provider** module and then the **Provider Search** window. If the Provider ID is known, enter the ID number on the **Quick Search** tab and click **Search** at the bottom.



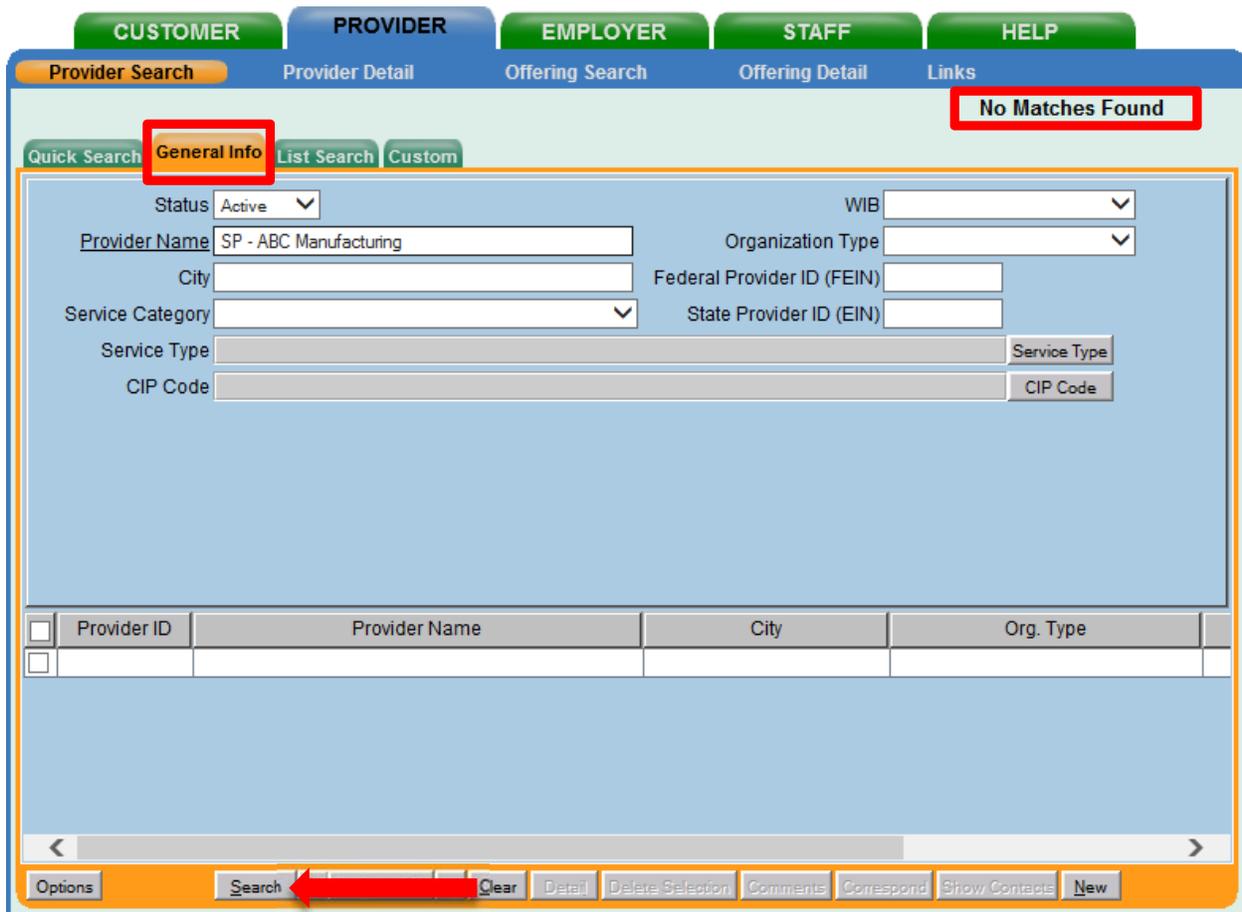
The screenshot displays the OSOS web application interface for the Provider Search function. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The PROVIDER tab is selected. Below this, the Provider Search window is open, showing tabs for Provider Search, Provider Detail, Offering Search, Offering Detail, and Links. The Provider Search tab is active, and the Quick Search sub-tab is selected. The Quick Search form contains a text input field for 'Provider ID' with the value '12345'. A dropdown menu is open below the input field, displaying the text 'Enter or paste one or more Provider IDs.' and a 'More' button. At the bottom of the interface, a 'Search' button is highlighted. The interface also shows a table with columns for 'Provider ID', 'Provider Name', 'City', and 'Org. Type'.

If the Provider ID number is not known, navigate to the **General Info** tab. Type in the Provider Name and click **Search** at the bottom of the screen.



When conducting a search using the Provider Name field, ensure that you are using the exact Provider Name. If your search returns "No Matches Found," try variations of the Provider Name.

If the system displays "No Matches Found" at the top right of the screen, staff must create the provider record.



The screenshot shows the OSOS interface with the 'PROVIDER' tab selected. The 'General Info' sub-tab is active. The 'Provider Name' field is populated with 'SP - ABC Manufacturing'. The 'Search' button at the bottom is highlighted with a red arrow. A red box at the top right contains the text 'No Matches Found'.

To create a new provider record, click **New** at the bottom right of this screen.



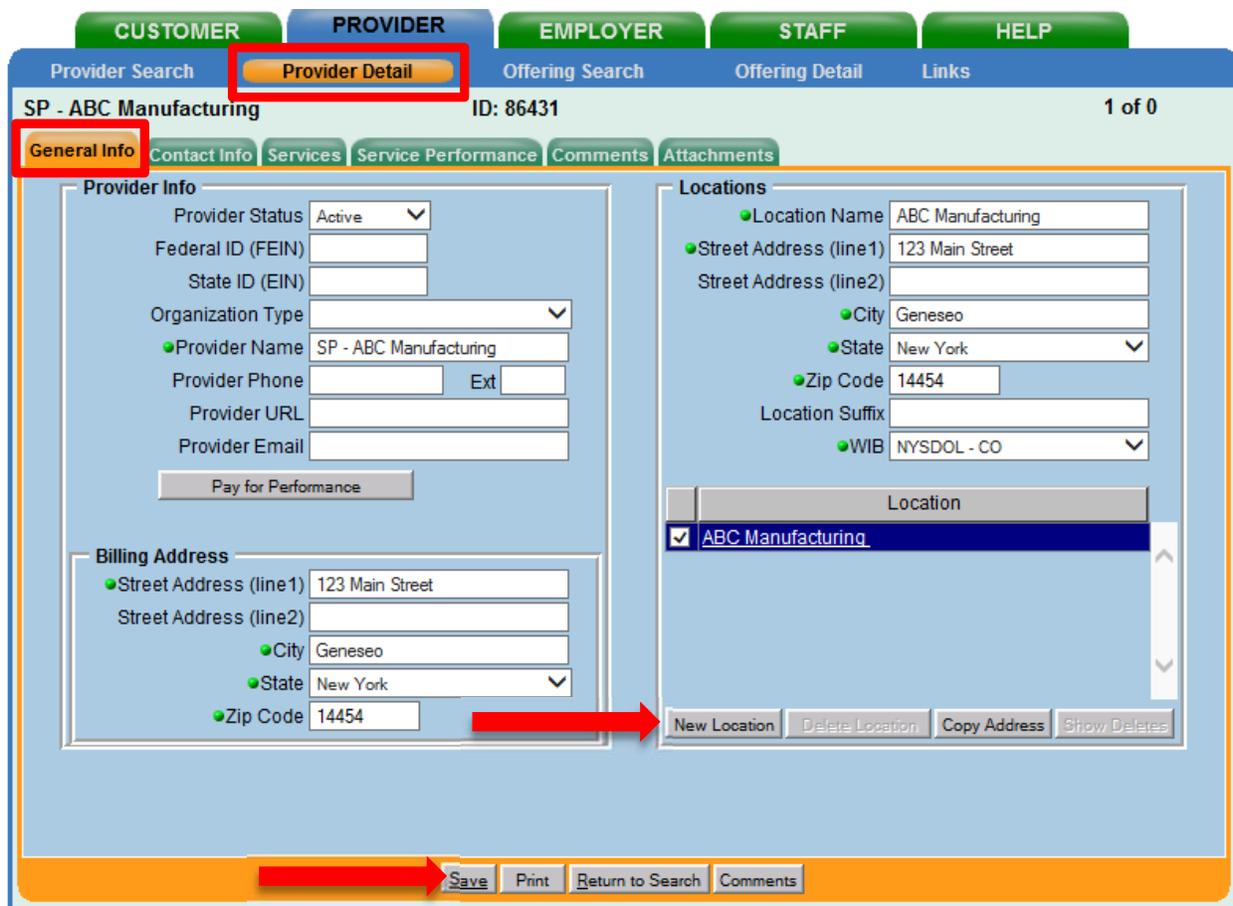
This close-up screenshot shows the bottom of the OSOS Provider Search screen. The 'New' button is highlighted with a red arrow.

OSOS will automatically navigate to the **Provider Detail** window of the **Provider** module.

Enter all known information in the **Provider Info** section on the left, including **Billing Address**. Only fields marked with a green dot are required. Next, click **New Location** and enter the physical location of the training provider in the **Locations** section. You may enter more than one location if necessary.

Tip: If the location address is the same as the address in **Provider Info**, use the **Copy Address** button to auto fill the address fields in the **Locations** section.

After all necessary information is entered, click **Save** at the bottom of the screen.

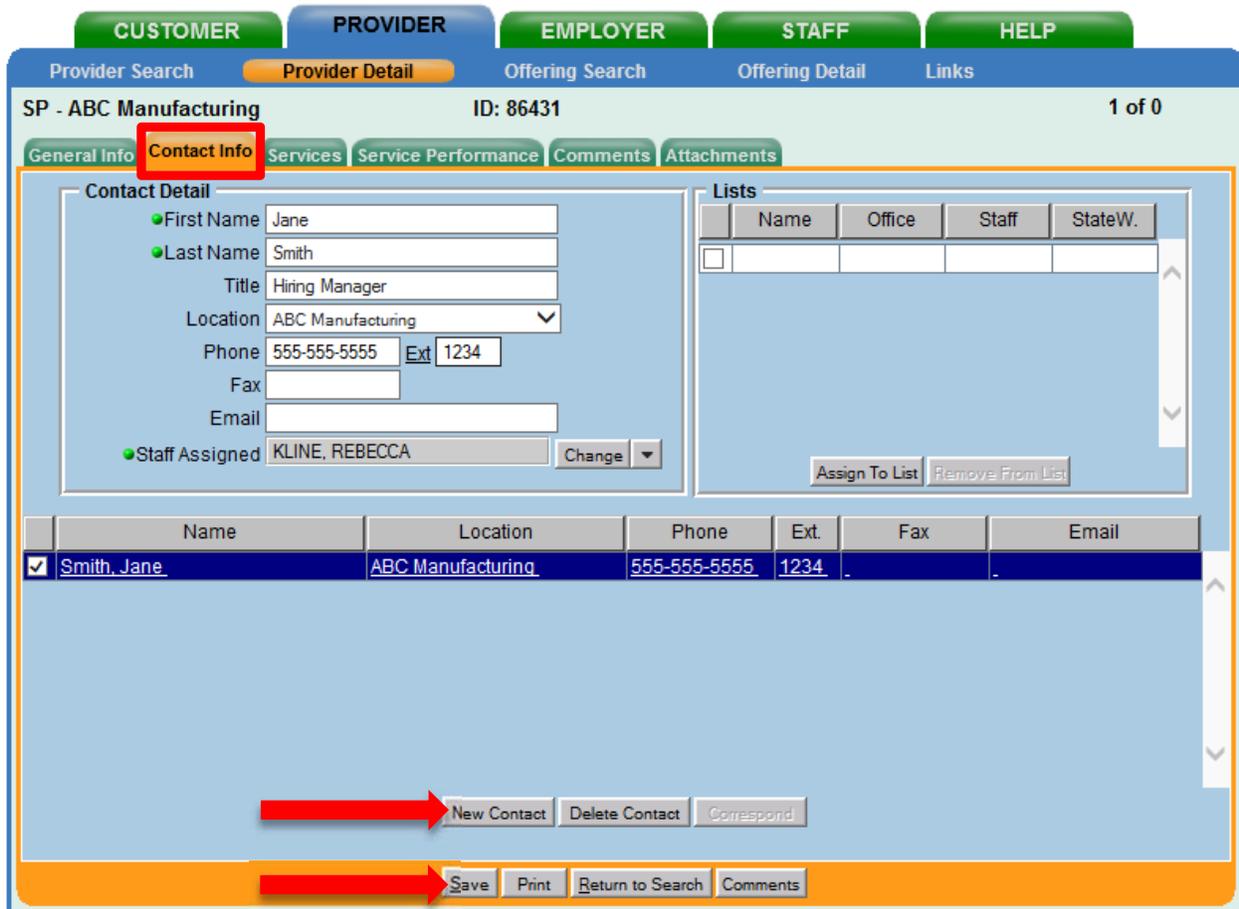


The screenshot displays the OSOS interface for the 'Provider Detail' window. At the top, there are navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail (highlighted with a red box), Offering Search, Offering Detail, and Links. The main header shows 'SP - ABC Manufacturing' and 'ID: 86431'. A secondary set of tabs includes General Info (highlighted with a red box), Contact Info, Services, Service Performance, Comments, and Attachments. The 'Provider Info' section contains fields for Provider Status (Active), Federal ID (FEIN), State ID (EIN), Organization Type, Provider Name (SP - ABC Manufacturing), Provider Phone, Provider URL, and Provider Email. A 'Pay for Performance' button is also present. The 'Billing Address' section includes fields for Street Address (line 1: 123 Main Street), Street Address (line 2), City (Geneseo), State (New York), and Zip Code (14454). The 'Locations' section shows a table with one entry: 'ABC Manufacturing' (checked). Below the table are buttons for 'New Location', 'Delete Location', 'Copy Address', and 'Show Deleted'. A red arrow points from the 'Copy Address' button in the Locations section to the 'Save' button at the bottom of the screen.

Click on the **Contact Info** tab.

Click **New Contact** and enter the appropriate contact information for the provider.

Click **Save**.



The screenshot shows the OSOS interface for a Provider Detail page. The top navigation bar includes tabs for CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with Provider Search, Provider Detail (selected), Offering Search, Offering Detail, and Links. The main content area displays 'SP - ABC Manufacturing' with ID: 86431 and '1 of 0' items. The 'Contact Info' tab is highlighted in red. The 'Contact Detail' section contains the following information:

- First Name: Jane
- Last Name: Smith
- Title: Hiring Manager
- Location: ABC Manufacturing
- Phone: 555-555-5555, Ext: 1234
- Fax: (empty)
- Email: (empty)
- Staff Assigned: KLINE, REBECCA (with a Change dropdown)

To the right is a 'Lists' section with a table header: Name, Office, Staff, StateW. Below the header is a table with one row containing a checkbox and empty cells. Buttons for 'Assign To List' and 'Remove From List' are at the bottom of this section.

At the bottom of the page, there are two rows of buttons. The first row contains 'New Contact', 'Delete Contact', and 'Correspond'. The second row contains 'Save', 'Print', 'Return to Search', and 'Comments'. Red arrows point to the 'New Contact' and 'Save' buttons.

Name	Location	Phone	Ext.	Fax	Email
<input checked="" type="checkbox"/> Smith, Jane	ABC Manufacturing	555-555-5555	1234	.	.



CREATING A PROVIDER SERVICE

Under the Work-Based Training (WBT) Initiative, funds are to be used to assist businesses efforts to effect new hires, specifically the expenses involved with occupational skills training. These WBT funds are reserved for the delivery of occupational skills training to newly-hired dislocated workers in need of additional occupational skills or dislocated workers seeking occupational skills training. Training may take the form of on-site training, off-site training, or distance learning.

Eligible applicants can apply for the following work-based training activities:

1) **On-The Job Training (OJT)**

OJT is training by a business provided to a paid participant while they are engaged in productive work.

2) **Registered Apprenticeships**

Registered Apprenticeship training is the process of learning a skilled occupation through paid on-the-job training under the guidance of experienced journey workers and related classroom training.

3) **Occupational Skills Training (OST)**

OST is defined as instruction conducted in an institutional or worksite setting designed to provide individuals with, or upgrade in, the skills required to perform a specific job or group of jobs needed by the business. OST for dislocated workers may be paid (new hires that are permanent, temporary, or seasonal) or unpaid (prospective applicants) and the training is:

- a. Designed to meet the special requirements of a business or a group of businesses; and
- b. Conducted with a commitment from local priority industry business(es) indicating occupational skill related job openings/workforce need and willingness to interview the dislocated workers following training completion.

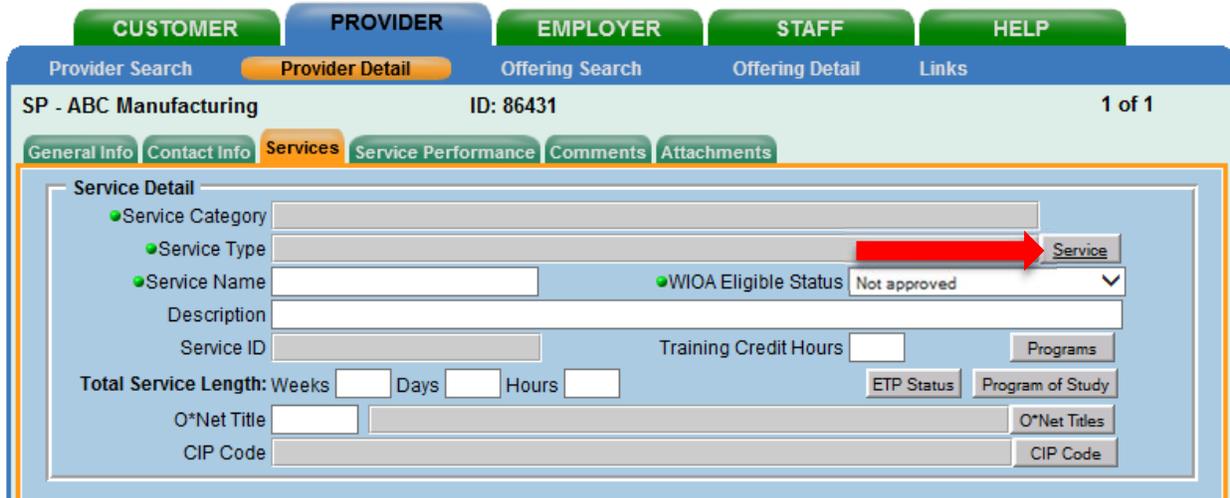


To record the delivery of these services, they first must be attached to the provider's OSOS record.

In the **Services** tab of the appropriate provider, click on the **New Service** button.

The screenshot displays the OSOS interface for a provider. At the top, there are navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail (selected), Offering Search, Offering Detail, and Links. The main header shows 'SP - ABC Manufacturing' with ID: 86431 and '1 of 1' records. The 'Services' tab is active and highlighted with a red box. The 'Service Detail' section contains several input fields: Service Category, Service Type, Service Name, WIOA Eligible Status, Description, Service ID, Training Credit Hours, Total Service Length (Weeks, Days, Hours), EIP Status, Program of Study, O*Net Title, and CIP Code. Below this is a table with columns for Category, Service Type, Service Name, and Description. At the bottom, a red arrow points to the 'New Service' button, which is part of a row of buttons including 'Delete Service', 'Print Service', 'New Offering', and 'Show Deletes'. A second row of buttons includes 'Save', 'Print', 'Return to Search', and 'Comments'.

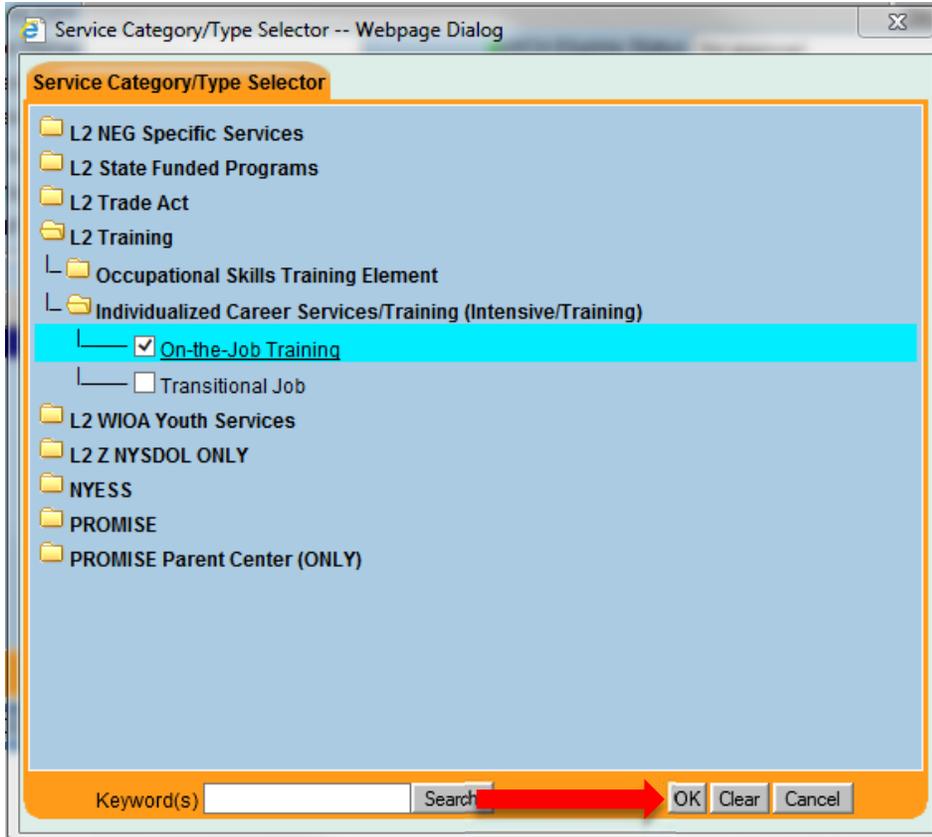
Click **Services** on the right to search for and add a service type.



The screenshot shows the 'Provider Detail' page for 'SP - ABC Manufacturing' (ID: 86431). The 'Services' tab is active. In the 'Service Detail' section, the 'Service Type' field is highlighted with a red arrow pointing to a 'Service' button. Other fields include 'Service Category', 'Service Name', 'Description', 'Service ID', 'Training Credit Hours', 'WIOA Eligible Status' (set to 'Not approved'), 'Total Service Length' (Weeks, Days, Hours), 'O*Net Title', and 'CIP Code'.

To find a service, either type in a keyword in the search box at the bottom of the **Service Category/Type Selector** pop up window or find the service type by clicking on the nested folders.

After finding the appropriate service, check the corresponding box, and click **OK**.



The screenshot shows the 'Service Category/Type Selector' dialog box. It contains a tree view of service categories. 'On-the-Job Training' is selected and highlighted in blue. Other categories include 'L2 NEG Specific Services', 'L2 State Funded Programs', 'L2 Trade Act', 'L2 Training', 'Occupational Skills Training Element', 'Individualized Career Services/Training (Intensive/Training)', 'Transitional Job', 'L2 WIOA Youth Services', 'L2 Z NYSDOL ONLY', 'NYESS', 'PROMISE', and 'PROMISE Parent Center (ONLY)'. At the bottom, there is a search box with a 'Search' button and 'OK', 'Clear', and 'Cancel' buttons. A red arrow points to the 'OK' button.

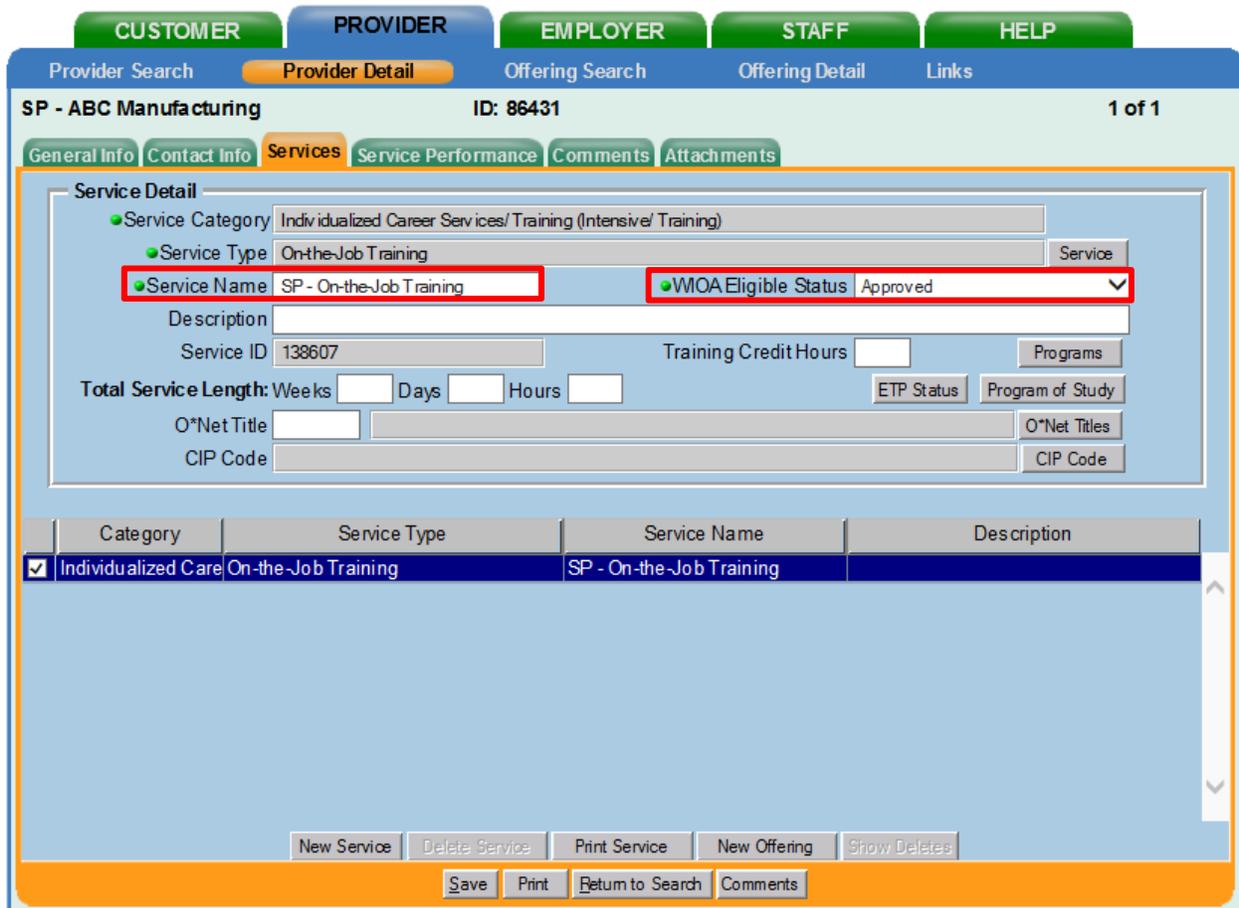
Enter the **Service Name**.



Service names should start with "SP - " followed by the name of the service, as a standard naming convention for the Sector Partnership NEG. For example, "SP – On-the-Job Training."

Select "Approved" in the **WIOA Eligible Status** drop-down menu.

Enter a description (optional) in the **Description** field and click **Save**.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail (selected), Offering Search, Offering Detail, and Links. The main header displays "SP - ABC Manufacturing" and "ID: 86431" with "1 of 1" on the right. A secondary set of tabs includes General Info, Contact Info, Services (selected), Service Performance, Comments, and Attachments. The "Service Detail" form contains the following fields:

- Service Category: Individualized Career Services/ Training (Intensive/ Training)
- Service Type: On-the-Job Training
- Service Name: SP - On-the-Job Training (highlighted with a red box)
- WIOA Eligible Status: Approved (highlighted with a red box)
- Description: (empty text field)
- Service ID: 138607
- Training Credit Hours: (empty text field)
- Total Service Length: Weeks (empty), Days (empty), Hours (empty)
- O*Net Title: (empty text field)
- CIP Code: (empty text field)

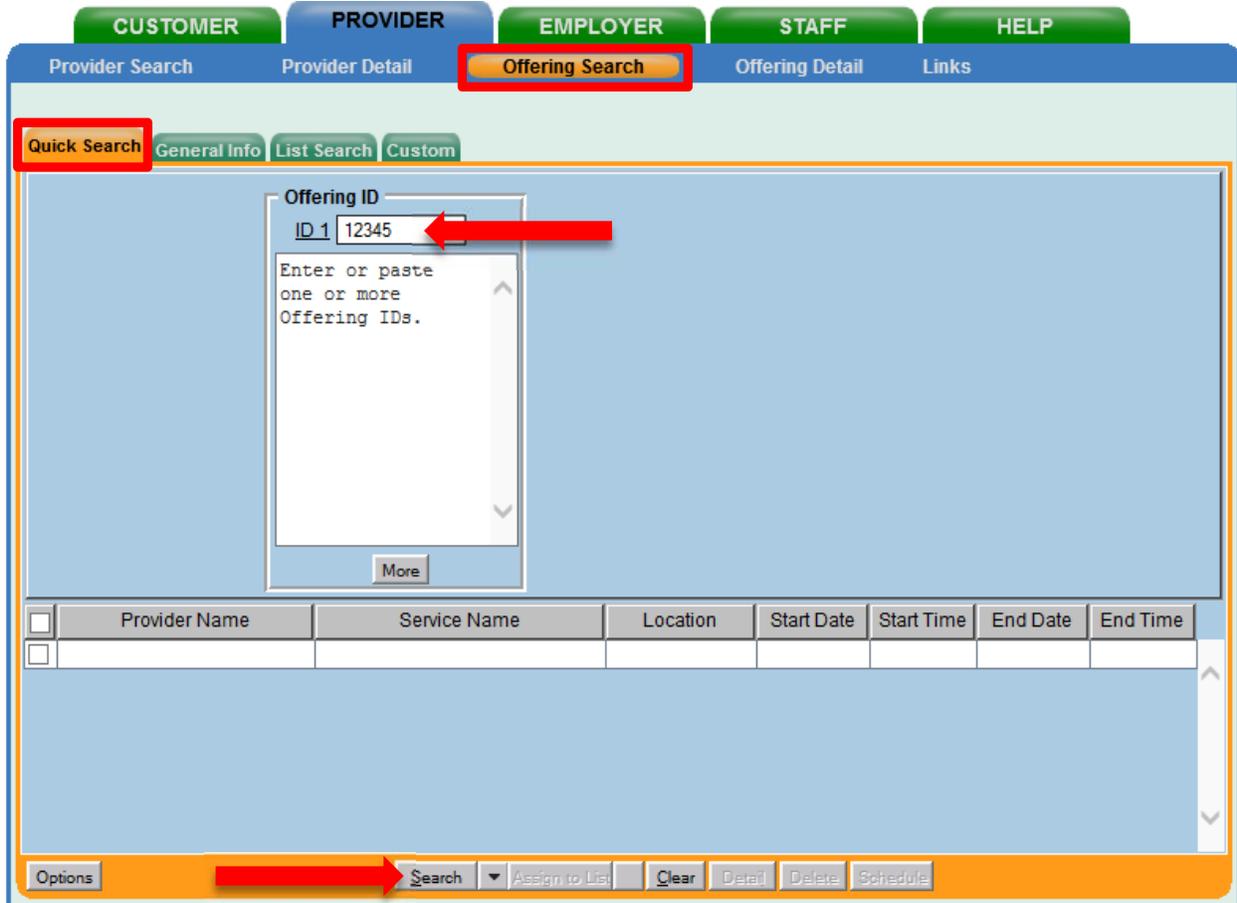
Below the form is a table with the following columns: Category, Service Type, Service Name, and Description. The first row is checked and contains:

Category	Service Type	Service Name	Description
<input checked="" type="checkbox"/>	Individualized Care	On-the-Job Training	SP - On-the-Job Training

At the bottom of the form, there are buttons for "New Service", "Delete Service", "Print Service", "New Offering", and "Show Deletes". A final row of buttons includes "Save", "Print", "Return to Search", and "Comments".

CREATING AN OFFERING

The training/service offered by the provider, combined with the location where the training/service is provided, is identified in OSOS as the **Offering**. As with the Provider Record, you should first search OSOS to determine if the offering already exists in the system. To do this, navigate to the **Offering Search** window of the **Provider** module. If you know the **Offering ID** number, you can type it in the search box on the **Quick Search** tab 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
- Quick Search sub-tabs: **Quick Search**, General Info, List Search, Custom
- Search box: Offering ID, ID 1 12345
- Search instructions: Enter or paste one or more Offering IDs.
- More button
- Table headers: Provider Name, Service Name, Location, Start Date, Start Time, End Date, End Time
- Table body: One empty row with checkboxes.
- Bottom buttons: Options, Search, Assign to List, Clear, Detail, Delete, Schedule



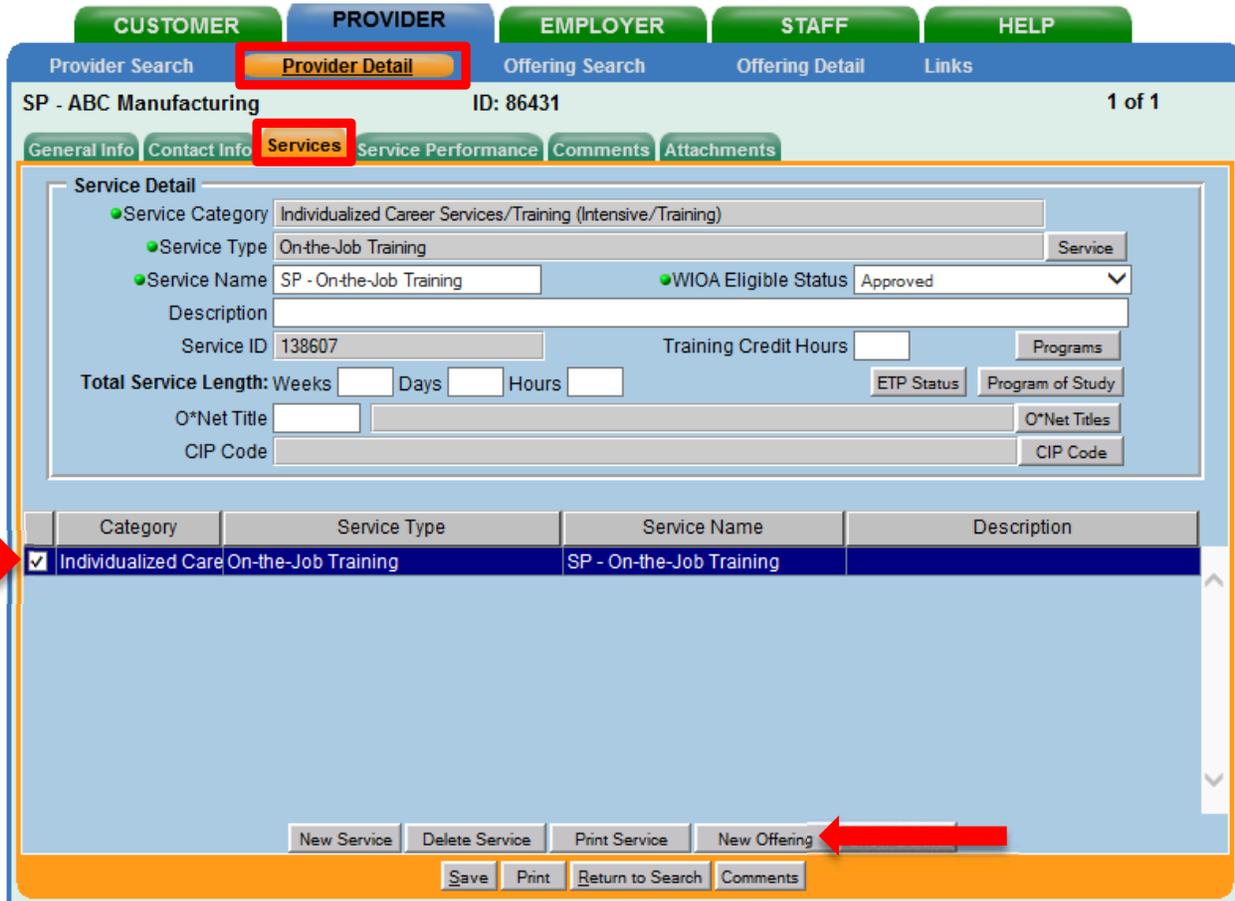
If you do not know the **Offering ID** number, click on the **General Info** tab to conduct a name search.

Enter the **Provider Name** and click **Search**.

If your search returns more than one result, the results will be listed in the bottom section of this screen. If your search returns only one result, OSOS will navigate directly to the Offering Detail screen for that search result. If your search returns no results, you will see the “**No Matches Found**” message at the top right. If no matches are found, you will need to create the offering for this provider.

The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (selected), Offering Detail, and Links. A red box highlights the message "No Matches Found" in the top right corner. The main search area has sub-tabs: Quick Search, General Info (selected), List Search, and Custom. The search form includes fields for Location (WIB dropdown, City text), Start Date Range (From/To text), Provider Information (Provider Name text with a red arrow pointing to "SP - ABC Manufacturing", Program dropdown, Provider Status dropdown set to "Active", and Service Type text), and a table with columns: Provider Name, Service Name, Location, Start Date, Start Time, End Date, and End Time. At the bottom, there are buttons for Options, Search, Assign to List, Clear, Detail, Delete, and Schedule.

Navigate to the provider that you wish to add the offering to. From the **Services** tab in the **Provider Detail** window, select the service you wish to create the offering for and click the **New Offering** button.



The screenshot shows the OSOS interface with the 'PROVIDER' tab selected. The 'Provider Detail' window is open for 'SP - ABC Manufacturing' with ID 86431. The 'Services' tab is active, displaying a form for service details and a table of services. A red arrow points to the 'New Offering' button at the bottom right.

Service Detail Form:

- Service Category: Individualized Career Services/Training (Intensive/Training)
- Service Type: On-the-Job Training
- Service Name: SP - On-the-Job Training
- WIOA Eligible Status: Approved
- Description: [Empty]
- Service ID: 138607
- Training Credit Hours: [Empty]
- Total Service Length: Weeks [Empty] Days [Empty] Hours [Empty]
- O*Net Title: [Empty]
- CIP Code: [Empty]

Category	Service Type	Service Name	Description
<input checked="" type="checkbox"/>	Individualized Care	On-the-Job Training	SP - On-the-Job Training

Buttons: New Service, Delete Service, Print Service, New Offering, Save, Print, Return to Search, Comments



Select the appropriate business, WIB or training provider from the **Location** drop down menu, if more than one exists. This is the location at which the service is offered.

Check the box for Monday as the day of the week that the training will start, regardless of when the training will actually start.

Do not check the Start Date, End Date, End Time, any other days of the week, or enter any number into the Total Seats or Available Seats data fields.

Enter \$1.00 in the **Cost** field.

In the **Description** field, enter a brief description of the specific training.

Click the **Save Single** button.

"**Record Saved**" will display briefly in the top right of the screen.

The screenshot shows the 'Offering Detail' page for 'SP - On-the-Job Training'. The form is divided into several sections:

- Provider Info:** Provider Name (SP - ABC Manufacturing), Service Category (Individualized Career Services/Training (Intensive/Training)), Service Type (On-the-Job Training), Service Description, Pay for Performance, and ETP Status.
- Location:** Location (ABC Manufacturing), Address (ABC Manufacturing - Broadway), City (Geneseo), State (New York), Zip (14454), and WIB (NYSDOL - CO).
- Schedule:** Start Date, End Date, Start Time, End Time, and checkboxes for days of the week: Sun., Mon. (checked), Tue., Wed., Thu., Fri., Sat.
- ETP Program of Study Leading to:** A list of options including Industry Recognized Certification, Registered Apprenticeship, State or National License, Associate Degree, Bachelor's Degree, Community College Certificate, Secondary School Diploma or Equivalent, Employment, and Measurable Skill Gain.
- Additional Info:** Cost (\$ 1.00), Seats, Available Seats, and Description.

At the bottom of the form, there are buttons for 'Save Single', 'Save Ongoing', 'Provider Services', and 'Return to Search'. Red arrows in the original image point to the 'Location' dropdown, the 'Mon.' checkbox, the 'Cost' field, and the 'Save Single' button.



PARTICIPANT DATA ENTRY

Now that the Training Provider(s), Service(s), and Offering(s) are in OSOS, staff may record participant data relevant to the services being provided to them.

RECORD THE SERVICE

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.



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.

OSOS ID	Seeker Name	DOB	Vet	Office	Staff A



An eligible participant **MUST** be categorized as a dislocated worker.

Eligible dislocated workers under this Request for Application (RFA) must have been newly hired dislocated workers in need of the identified occupational training or unemployed dislocated workers with skill-based barriers to employment in priority industries. Dislocated workers in SP-NEG WBT funded training programs must be enrolled in a Dislocated Worker program or seeking training to obtain employment or career advancement in priority industries at a NYS Career Center.

Dislocated worker status is documented on the **Work History** tab within the **Customer Detail** window of the **Customer** module, in the **Reason for Leaving** field. Eligible participants will have one designation between Category 1-DW through Category 6-DW.

The screenshot displays the OSOS Customer Detail window for Polly Pickett. The 'Work Hist.' tab is selected, and the 'Reason for Leaving' dropdown menu is open, showing various dislocation categories. A red arrow points to the 'Reason for Leaving' field, which is currently set to 'Category 1-DW'. The dropdown menu lists the following categories:

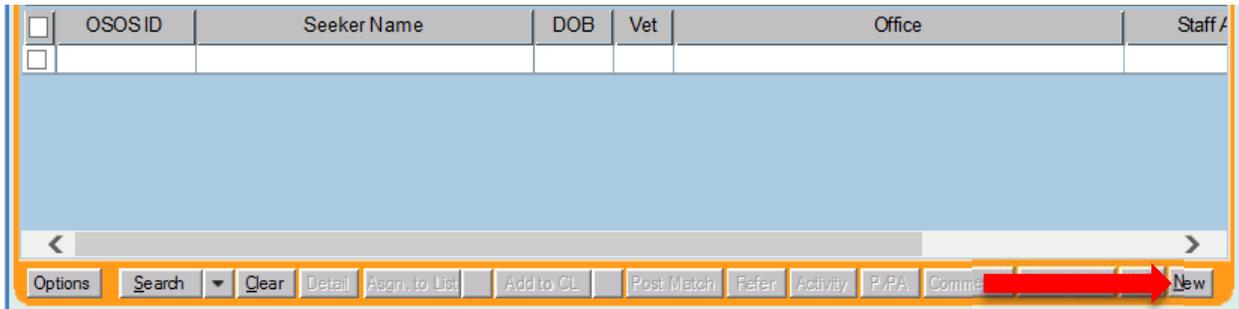
- Category 1-DW
- Category 2-DW mass layoff or closure
- Category 3-DW self-employed
- Category 4-DW displaced homemaker
- Category 5-DW Dislocated due to foreign trade
- Category 6-DW Spouse of a member of the Armed Forces
- Fired
- Lack of work
- Medical/Health
- Quit
- Retired
- Still employed
- Strike
- Other
- WTC Disaster

The 'Dislocated Worker Information' section shows a Qualifying Dislocation Date of 05/20/2017 and a Tenure of 56 months. The 'Job' table below lists two entries:

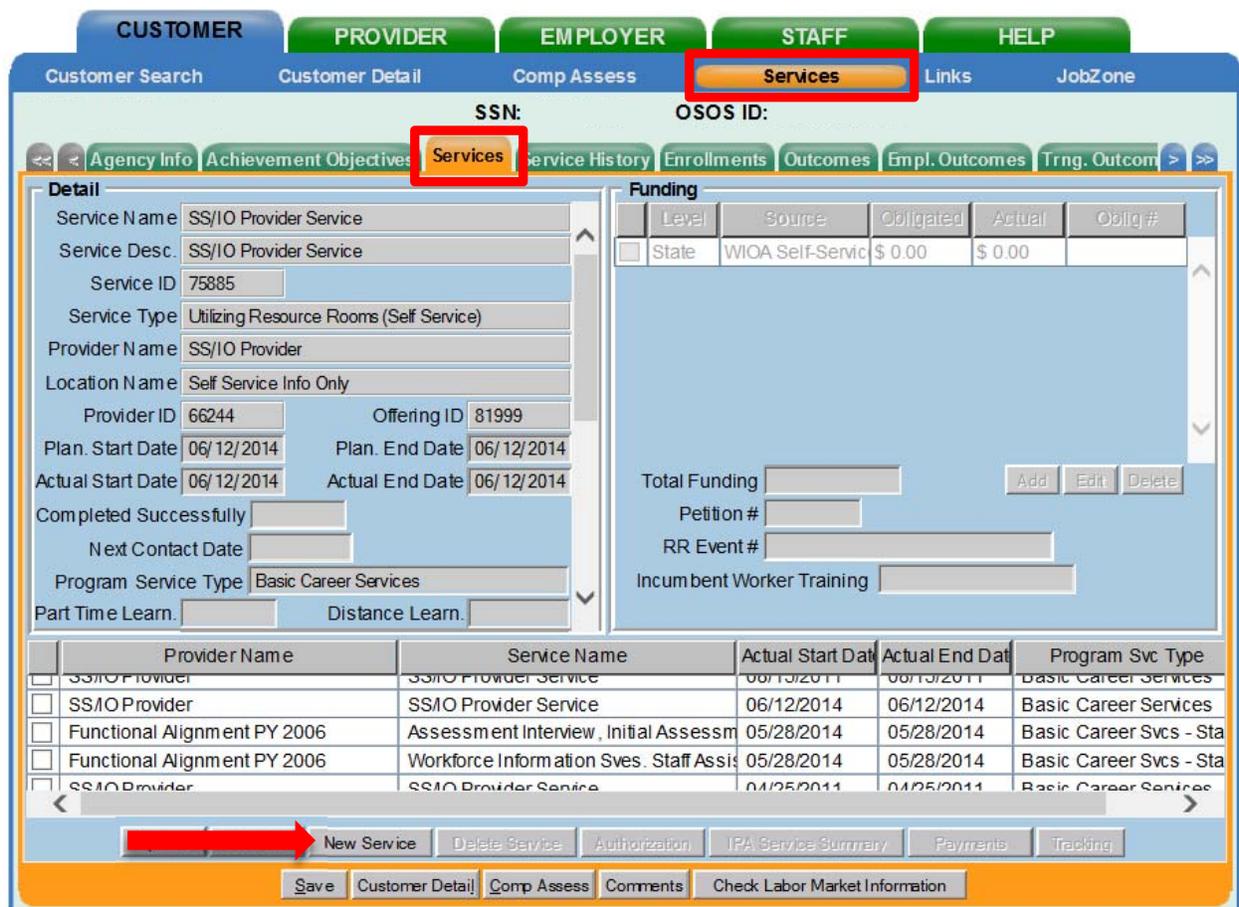
Job	Company	City	Start Date	End Date
<input checked="" type="checkbox"/> Secretaries and Administrative Assis	ABC Community College	Kingston	09/01/2012	05/20/2017
<input type="checkbox"/> Bookkeeping, Accounting, and Auditin	DEF Daycare	Ithaca	02/01/2010	08/01/2012



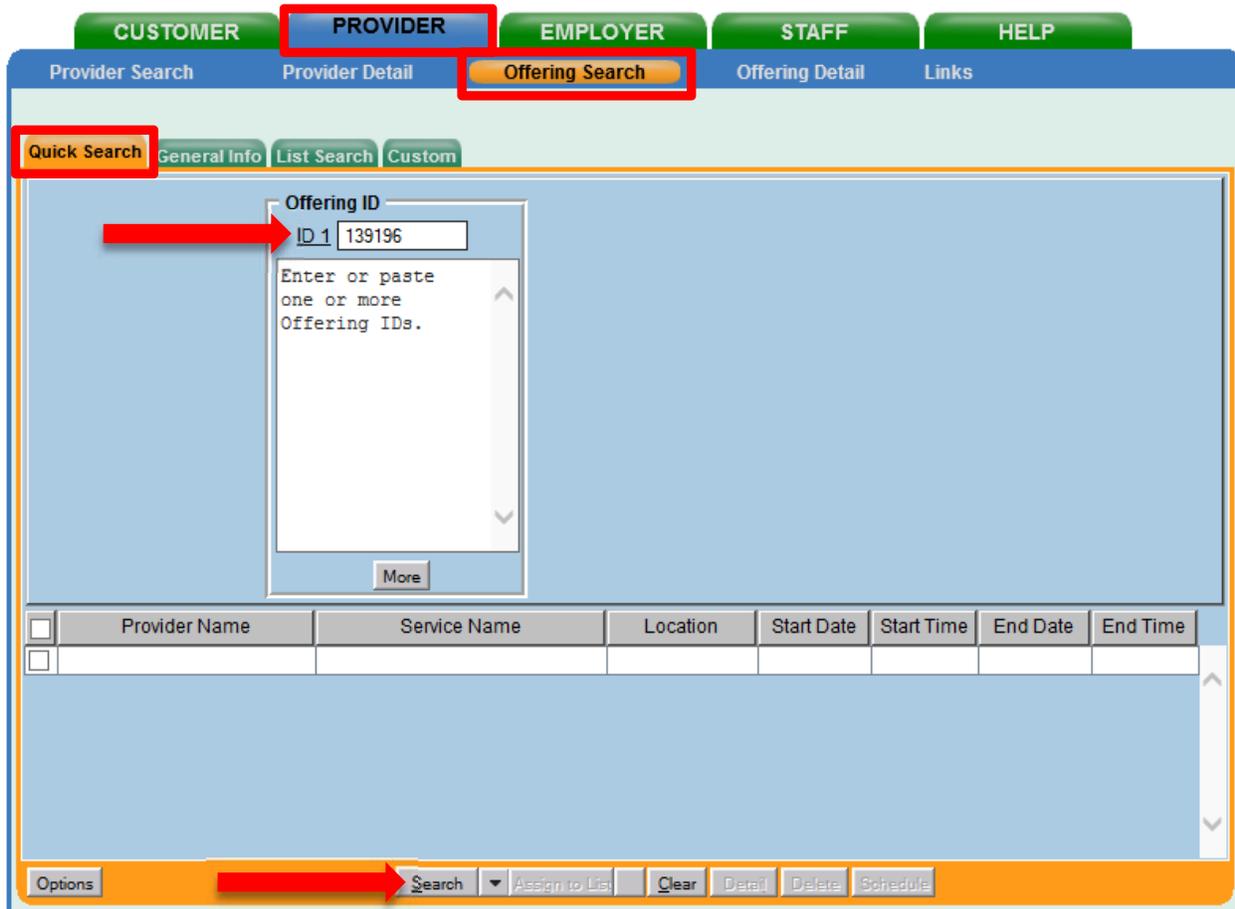
If the participant does not have an OSOS record one must be created. To create a new OSOS customer record click **New** at the bottom of the screen and fill in the necessary details in the **Customer Detail** tabs.



Once in the correct customer record, navigate to the **Services** window and then the **Services** tab of the customer record. Click on the **New Service** button at the bottom of the screen.



After you click on the **New Service** button, OSOS will automatically navigate to the **Provider** module. Within the **Provider** module, OSOS will default to 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 139196
- Search instructions: Enter or paste one or more Offering IDs.
- Buttons: More, Search, Assign to List, Clear, Detail, Delete, Schedule
- Table headers: Provider Name, Service Name, Location, Start Date, Start Time, End Date, End Time

If the **Offering ID** is not known, click on the **General Info** tab.

CUSTOMER **PROVIDER** EMPLOYER STAFF HELP

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

Quick Search **General Info** List Search Custom

Location
 WIB

Start Date Range
 From To

Provider Information
 Provider Name Service Name Program

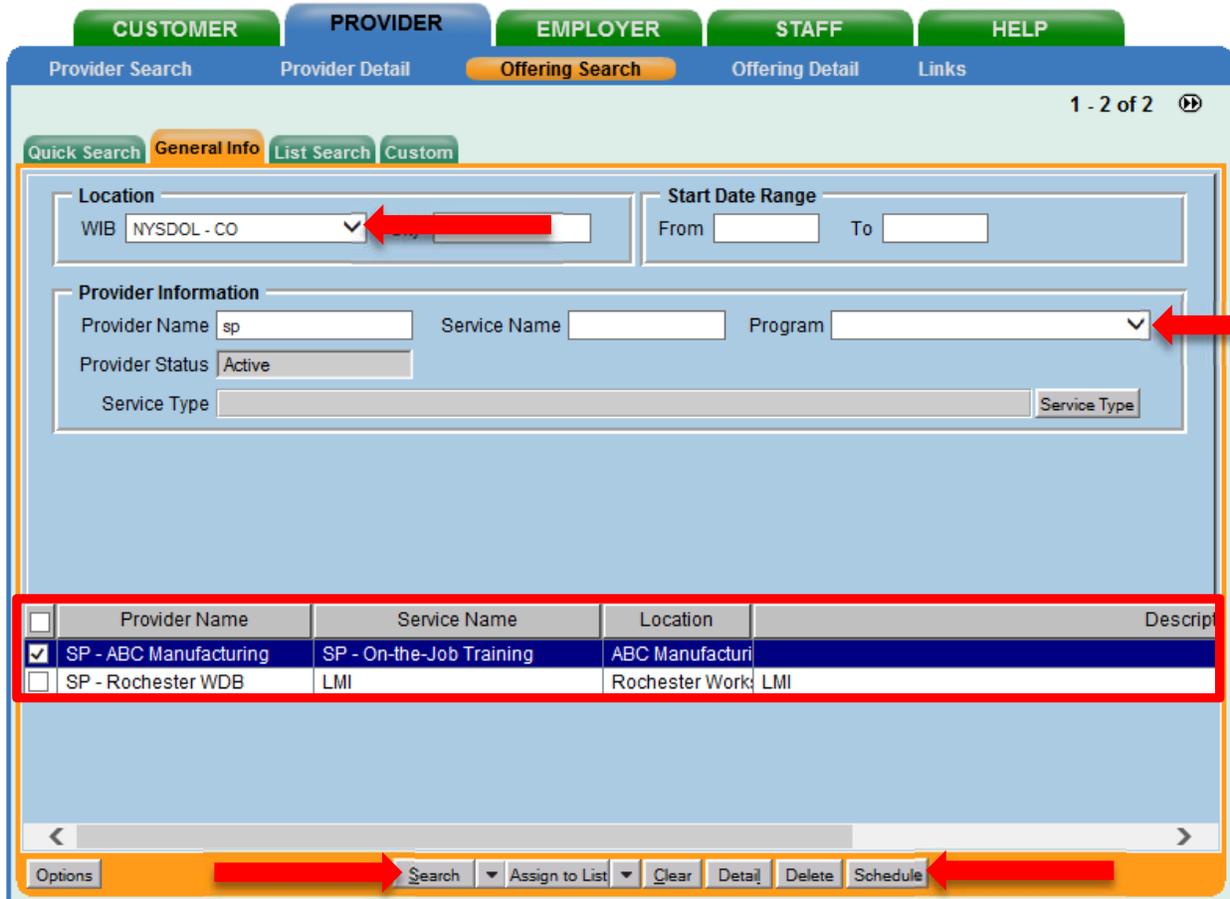
Provider Status

Service Type

<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>							

Select the **WIB**. Enter any known information in the available data fields. OSOS allows you to enter a partial name for the **Provider Name** and **Service Name** fields. You can also select the Program Type from the **Program** drop down menu. Click **Search**.

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



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

1 - 2 of 2

Quick Search **General Info** List Search Custom

Location: WIB NYSDOL - CO Start Date Range: From To

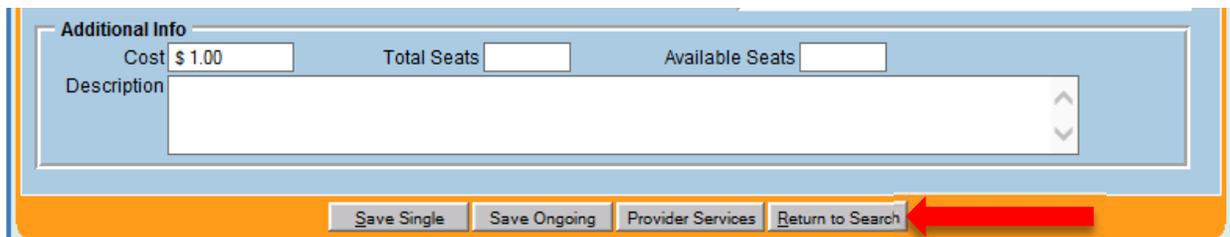
Provider Information:
 Provider Name: sp Service Name: Program:
 Provider Status: Active Service Type: Service Type

<input type="checkbox"/>	Provider Name	Service Name	Location	Description
<input checked="" type="checkbox"/>	SP - ABC Manufacturing	SP - On-the-Job Training	ABC Manufactur	
<input type="checkbox"/>	SP - Rochester WDB	LMI	Rochester Work	LMI

Options Search Assign to List Clear Detail Delete Schedule



*If your search only returns one result, OSOS will navigate directly to the **Offering Detail** screen for that provider. Click on 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.*



Additional Info

Cost: \$ 1.00 Total Seats: Available Seats:
 Description:
 Save Single Save Ongoing Provider Services **Return to Search**



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 and complete the data entry in the **Detail** section (left hand side).

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

SSN: OSOS ID:

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

Detail

Service Name: SP - On-the-Job Training

Service Desc.:

Service ID: 138607

Service Type: On-the-Job Training

Provider Name: SP - ABC Manufacturing

Location Name: ABC Manufacturing

Provider ID: 86431 Offering ID: 139196

Plan. Start Date: Plan. End Date:

Actual Start Date: 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:

Petition #:

RR Event #:

Incumbent Worker Training:

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Functional Alignment PY 2006	Workforce Information Svcs. Staff Assis	05/28/2014	05/28/2014	Basic Career Svcs - Sta
<input type="checkbox"/>	SS/O Provider	SS/O Provider Service	04/25/2011	04/25/2011	Basic Career Services
<input type="checkbox"/>	Functional Alignment PY 2006	Assessment Interview, Initial Assessm	03/30/2011	03/30/2011	Basic Career Svcs - Sta
<input checked="" type="checkbox"/>	SP - ABC Manufacturing	SP - On-the-Job Training			

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 actually began.

Actual End Date – This field can be left blank until the service ends. If the service is a one-day service (such as a Comprehensive Assessment), 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 in order 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.



Note: On-the-Job Training and Apprenticeships should be categorized as Non- ITA Training. Occupational Skills Training should be categorized as ITA-Training.

Basic Career Services
Basic Career Svcs - Staff Assisted
Follow Up
Individualized Career Services
ITA-Training
Non-ITA Training
Youth Services

O*Net – (If applicable) 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.



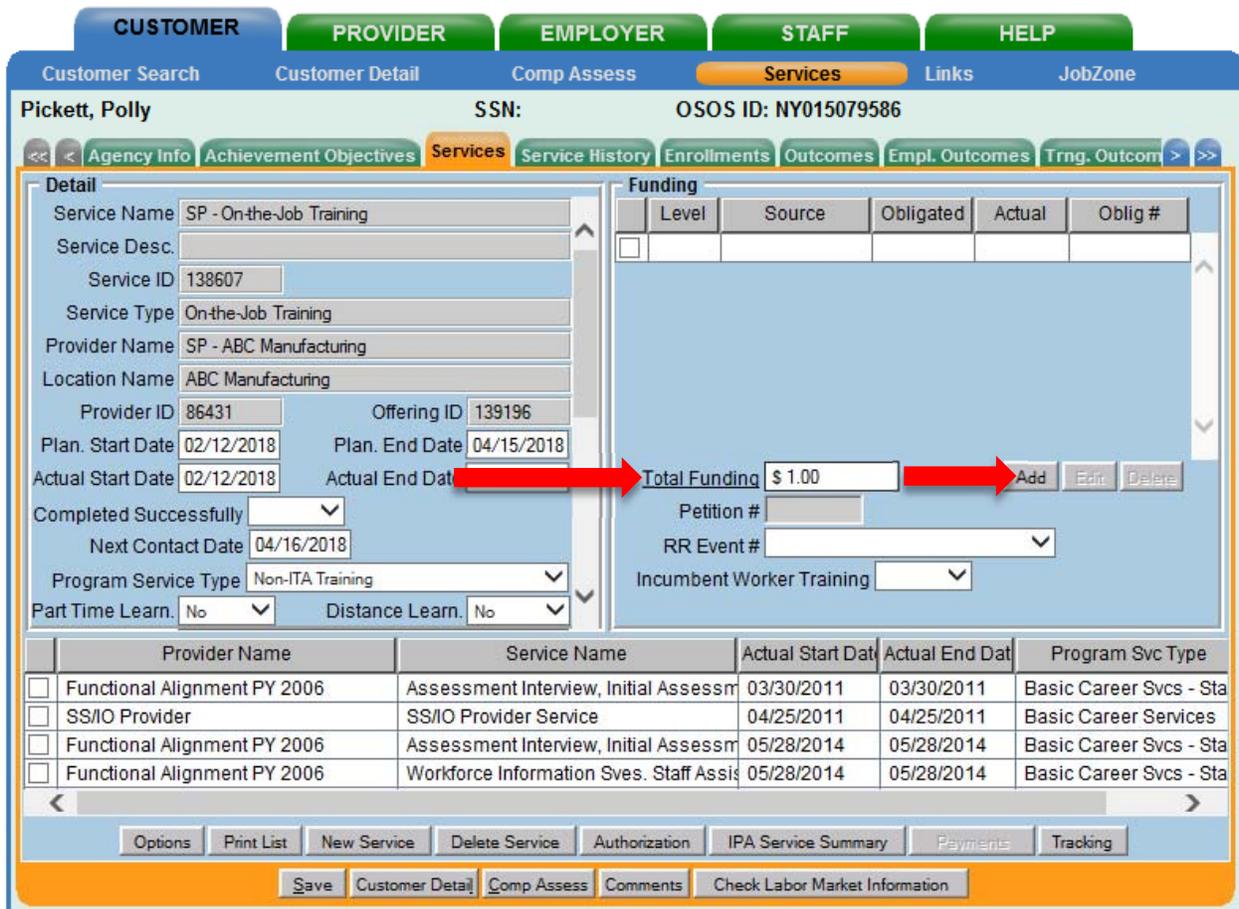
*Depending on the type of service you enter, some of the fields in the **Detail** section will not apply. As a general rule, provide as much known information about the service as possible.*

Once the **Detail** section (left-hand side) has been completed, click **Save**.

Now the **Funding** section (right-hand side) must be completed for the service. To do this, enter \$1.00 in the **Total Funding** field. 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.



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

Pickett, Polly SSN: OSOS ID: NY015079586

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

Detail

Service Name: SP - On-the-Job Training

Service Desc:

Service ID: 138607

Service Type: On-the-Job Training

Provider Name: SP - ABC Manufacturing

Location Name: ABC Manufacturing

Provider ID: 86431 Offering ID: 139196

Plan. Start Date: 02/12/2018 Plan. End Date: 04/15/2018

Actual Start Date: 02/12/2018 Actual End Date:

Completed Successfully:

Next Contact Date: 04/16/2018

Program Service Type: Non-ITA Training

Part Time Learn: No Distance Learn: No

Funding

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

Total Funding: \$ 1.00 Add Edit Delete

Petition #:

RR Event #:

Incumbent Worker Training:

	Provider Name	Service Name	Actual Start Dat	Actual End Dat	Program Svc Type
<input type="checkbox"/>	Functional Alignment PY 2006	Assessment Interview, Initial Assessm	03/30/2011	03/30/2011	Basic Career Svcs - Sta
<input type="checkbox"/>	SS/IO Provider	SS/IO Provider Service	04/25/2011	04/25/2011	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 Sves. Staff Assis	05/28/2014	05/28/2014	Basic Career Svcs - Sta

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

Save Customer Detail Comp Assess Comments Check Labor Market Information



After you click **Add**, a pop up widow will appear with a list of funding sources. Check the box next to **SP – Work Based Training** to select that funding source. Enter “\$1.00” in the **Obligated Amount** field and click **OK**.

Funding -- Webpage Dialog

Funding

	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	WIB	WIOA Adult Local	2015	\$ 2013.00	
<input type="checkbox"/>	WIB	WIOA Adult Local	2016	\$ 97070.00	
<input type="checkbox"/>	WIB	WIOA Adult Local	2017	\$ 99988.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2015	\$ 1886.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2016	\$ 93207.00	
<input type="checkbox"/>	WIB	WIOA Dislocated Worker Local	2017	\$ 99999.00	
<input type="checkbox"/>	WIB	WIOA Youth Local	2015	\$ 9525.00	
<input type="checkbox"/>	WIB	WIOA Youth Local	2016	\$ 99659.00	
<input type="checkbox"/>	WIB	WIOA Youth Local	2017	\$ 94900.00	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2015	\$ 9991.00	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2015	\$ 9999.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2015	\$ 10000.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2017	\$ 100000.00	
<input type="checkbox"/>	State	WIRED	2015	\$ 9998.00	WR12
<input type="checkbox"/>	WIB	DEI Supplemental	2016	\$ 100000.00	
<input type="checkbox"/>	WIB	SP - Enhanced Career Services	2015	\$ 9999.00	NY16
<input type="checkbox"/>	WIB	SP - Transitional Employment	2015	\$ 10000.00	NY16
<input checked="" type="checkbox"/>	WIB	SP - Work Based Training	2015	\$ 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.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

SSN: OSOS ID:

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

Detail

Service Name: SP - On-the-Job Training

Service Desc.:

Service ID: 138607

Service Type: On-the-Job Training

Provider Name: SP - ABC Manufacturing

Location Name: ABC Manufacturing

Provider ID: 86431 Offering ID: 139196

Plan. Start Date: 02/12/2018 Plan. End Date: 04/15/2018

Actual Start Date: 02/12/2018 Actual End Date:

Completed Successfully:

Next Contact Date: 04/16/2018

Program Service Type: Non-ITA Training

Part Time Learn.: No Distance Learn.: No

Funding

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

Total Funding: \$ 1.00 Add Edit Delete

Petition #:

RR Event #:

Incumbent Worker Training:

	Provider Name	Service Name	Actual Start Dat	Actual End Dat	Program Svc Type
<input type="checkbox"/>	Functional Alignment PY 2006	Workforce Information Svcs. Staff Assis	05/28/2014	05/28/2014	Basic Career Svcs - Sta
<input type="checkbox"/>	SS/IO Provider	SS/IO Provider Service	06/12/2014	06/12/2014	Basic Career Services
<input type="checkbox"/>	SS/IO Provider	SS/IO Provider Service	08/15/2011	08/15/2011	Basic Career Services
<input checked="" type="checkbox"/>	SP - ABC Manufacturing	SP - On-the-Job Training	02/12/2018		Non-ITA Training

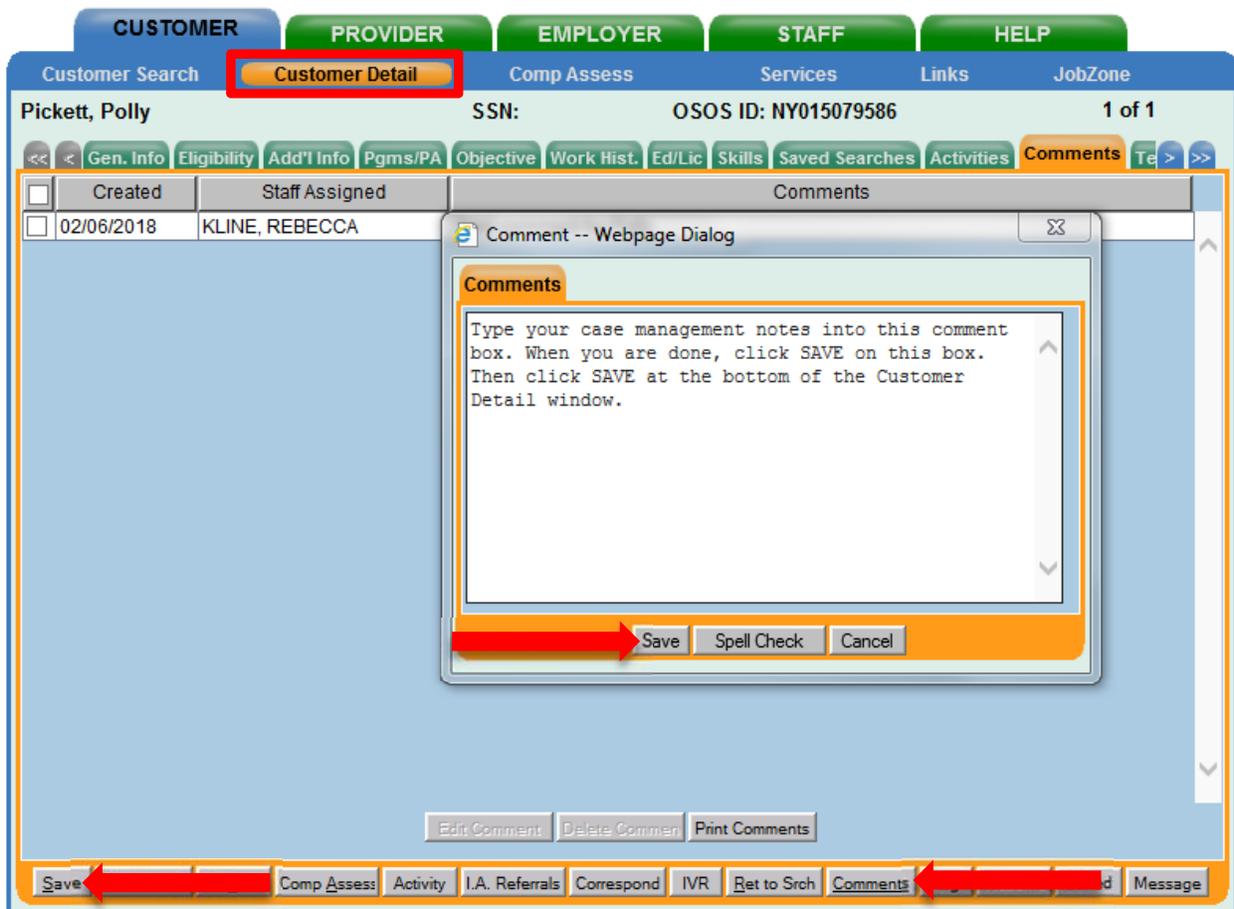
Options Print List New Service Delete Service Authorization IPA Service Summary Payments Tracking

Save Customer Detail Comp Assess Comments Check Labor Market Information

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.

Comments can be added by clicking the **Comments** button at the bottom of the screen in the **Customer Detail** window. The **Comments -- 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 by clicking **Save** at the bottom of the screen.



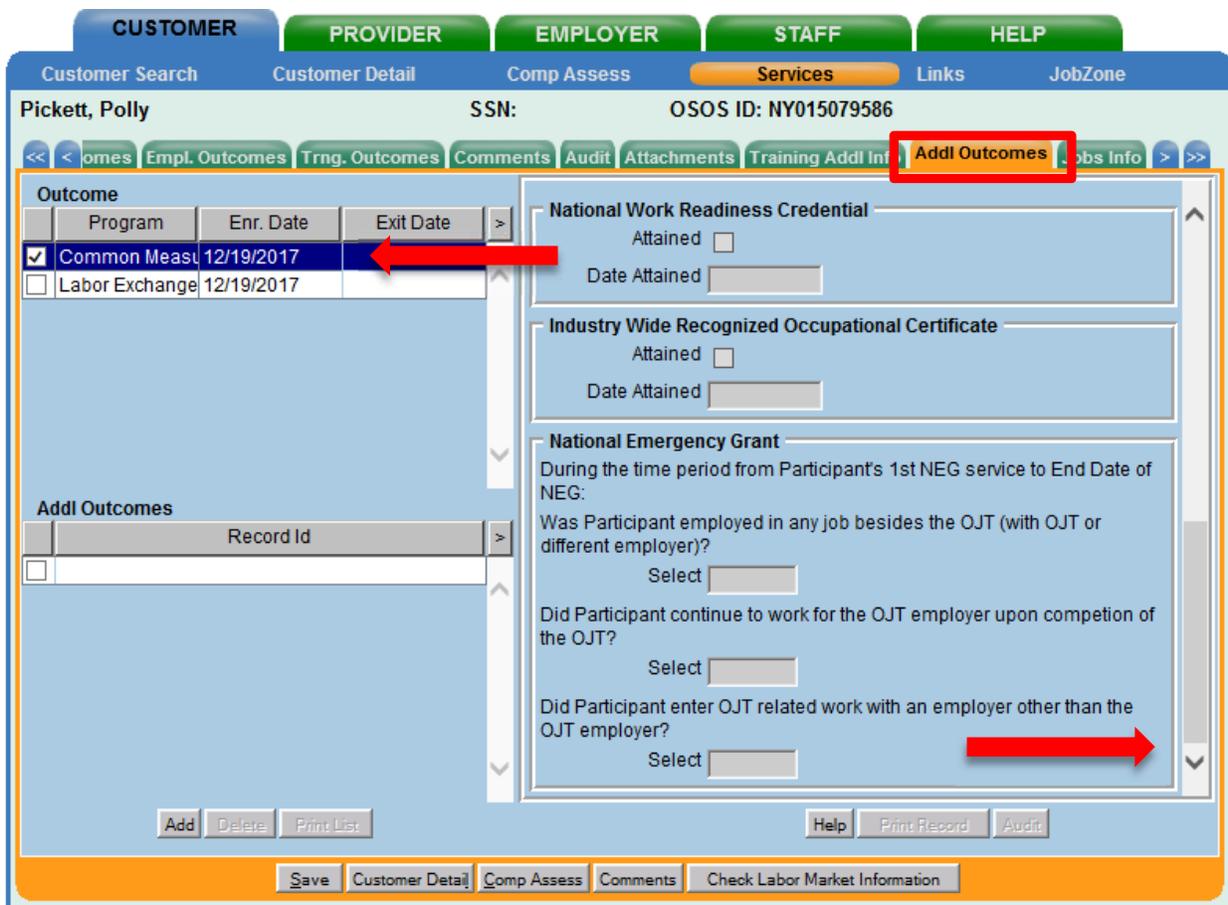
The screenshot shows the OSOS Customer Detail window for 'Pickett, Polly'. The 'Customer Detail' tab is selected. A 'Comments -- Webpage Dialog' box is open, containing a text area with the following text: 'Type your case management notes into this comment box. When you are done, click SAVE on this box. Then click SAVE at the bottom of the Customer Detail window.' The 'Save' button in the dialog is highlighted with a red arrow. At the bottom of the main window, the 'Save' button is also highlighted with a red arrow.

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 **Addl Outcomes** (Additional Outcomes) tab.

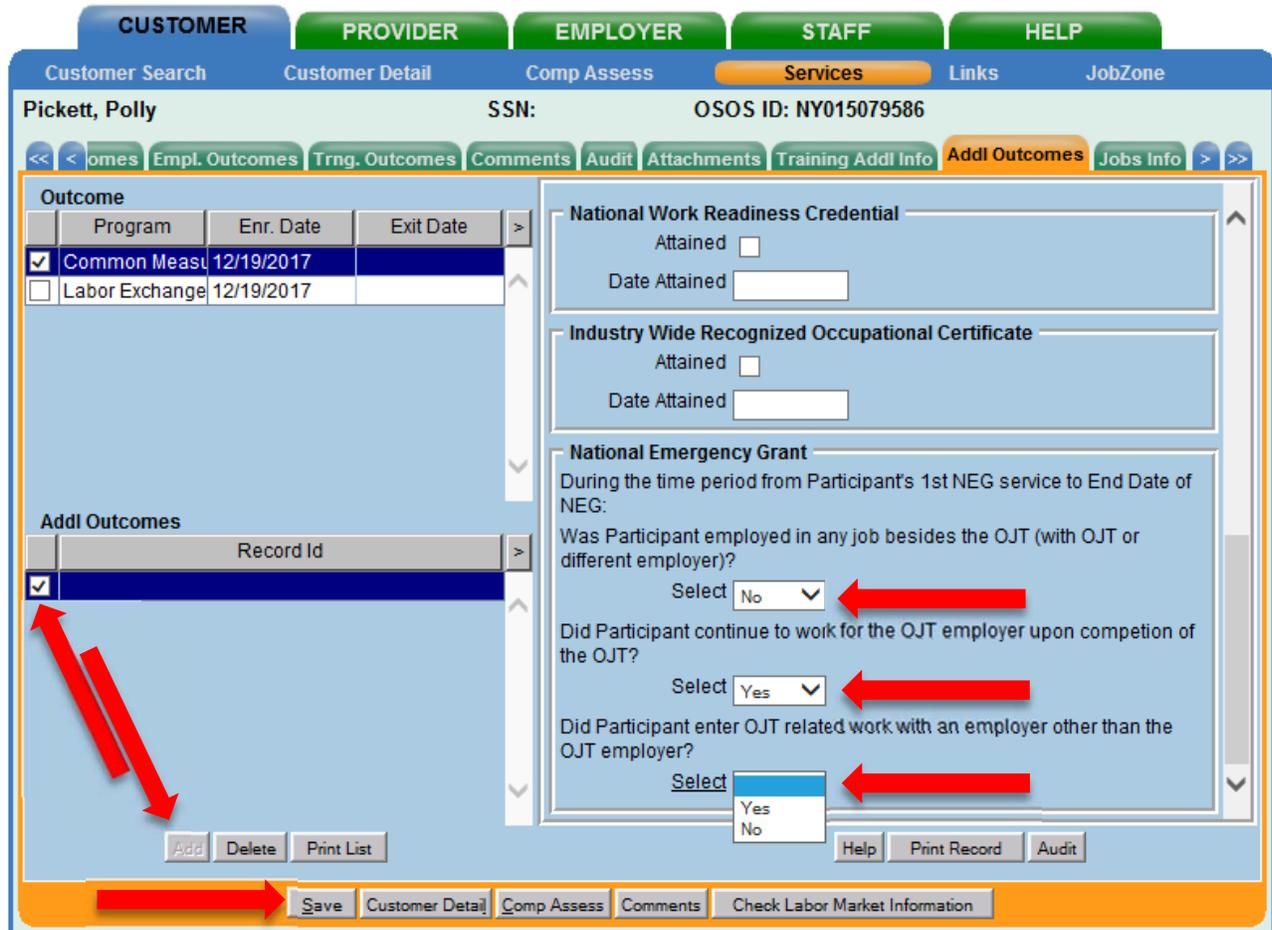


On the **Addl Outcomes** tab, select the **Common Measures** enrollment with an enrollment date that corresponds to the date the SP – NEG service was entered (left-hand side). After you select the enrollment, use the scrollbar on the right-hand side to scroll down to the very bottom of the page.



Under the **Record ID** section (bottom left-hand side), click the **Add** button. This will allow you to enter data in the fields on the right. Under the **National Emergency Grant** section, select “Yes” or “No” in the drop down menu for each of the three questions and click **Save**.

Be sure to answer all three questions.



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

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

Pickett, Polly SSN: OSOS ID: NY015079586

<< < > >> Home Empl. Outcomes Trng. Outcomes Comments Audit Attachments Training Addl Info **Add Outcomes** Jobs Info

Outcome			
	Program	Enr. Date	Exit Date
<input checked="" type="checkbox"/>	Common Measu	12/19/2017	
<input type="checkbox"/>	Labor Exchange	12/19/2017	

Addl Outcomes

	Record Id
<input checked="" type="checkbox"/>	

Add Delete Print List

National Work Readiness Credential
 Attained
 Date Attained

Industry Wide Recognized Occupational Certificate
 Attained
 Date Attained

National Emergency Grant
 During the time period from Participant's 1st NEG service to End Date of NEG:
 Was Participant employed in any job besides the OJT (with OJT or different employer)?
 Select ←

Did Participant continue to work for the OJT employer upon completion of the OJT?
 Select ←

Did Participant enter OJT related work with an employer other than the OJT employer?
 Select ←

Yes
No

Help Print Record Audit

Save Customer Detail Comp Assess Comments 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