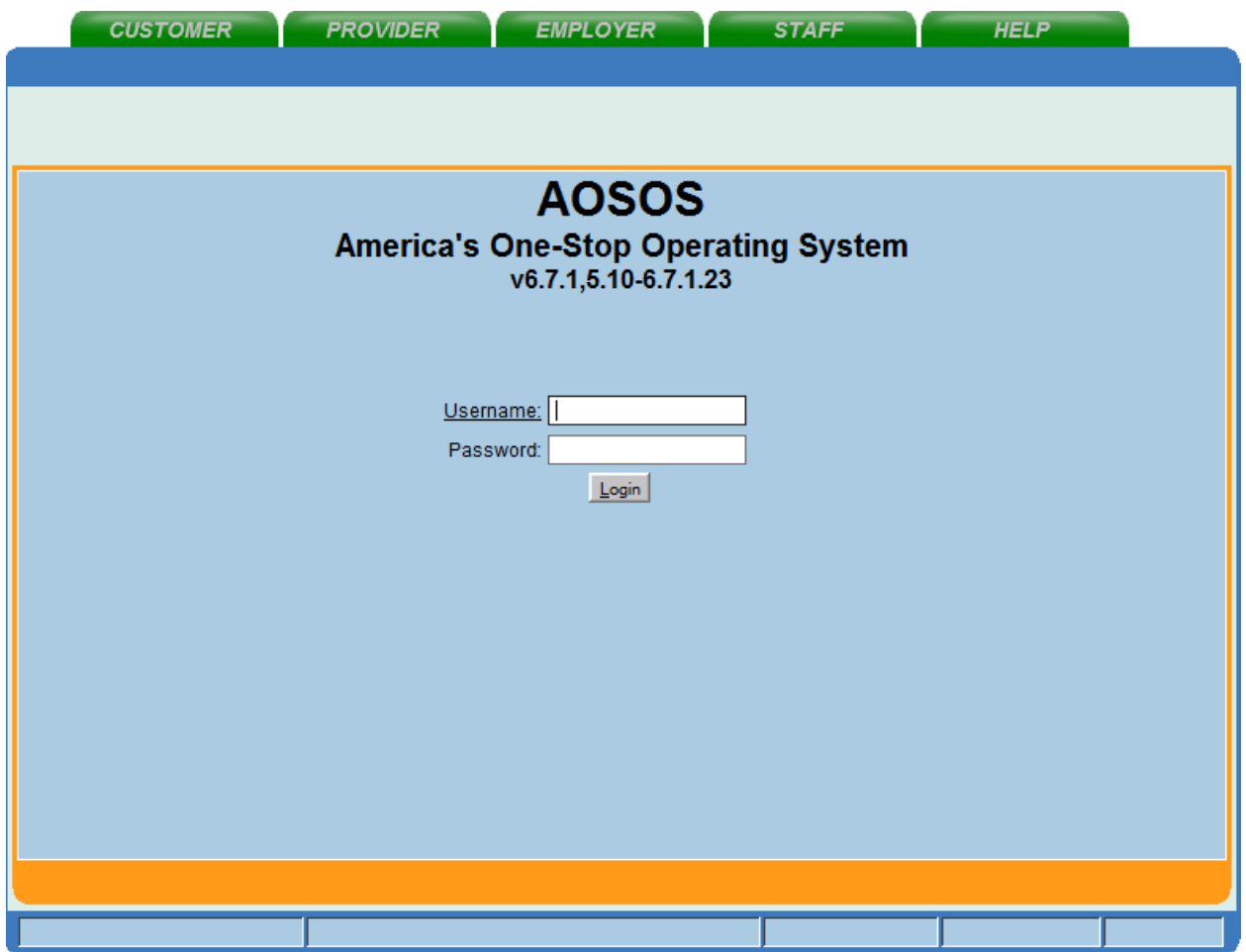


OSOS Data Entry Guide:

Sector Partnership National Emergency Grant – Transitional Employment for Dislocated Workers



The screenshot shows the OSOS login interface. At the top, there are five green navigation buttons: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these is a light blue header bar. The main content area has a light blue background and contains the following text:

AOSOS
America's One-Stop Operating System
v6.7.1,5.10-6.7.1.23

Username:
Password:

At the bottom of the page, there is a blue footer bar with five empty rectangular slots.



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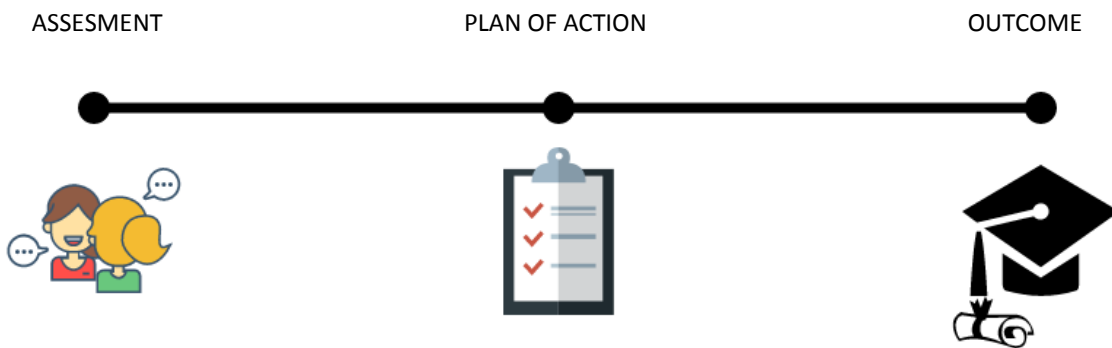
PURPOSE	3
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PURPOSE

The purpose of the SP NEG – TEDW is to provide occupational training and enhanced career services to dislocated workers.

These services, will empower participants to reconnect to the workforce through enhanced career services and work-based training opportunities.

OSOS is a case management system designed to describe 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. It will cover data entry for the service provider, as well as data entry for the participant. If you have never used OSOS, please see the guide on [Accessing the System](#) for information regarding setting up an account, following confidentiality procedures, and performing the appropriate system setup.

[SP NEG – Transitional Employment for Dislocated Workers Request for Qualification RFQ](#)

[RFQ Questions and Answers](#)

SP – NEG AWARDEES (AS OF MARCH, 2017)

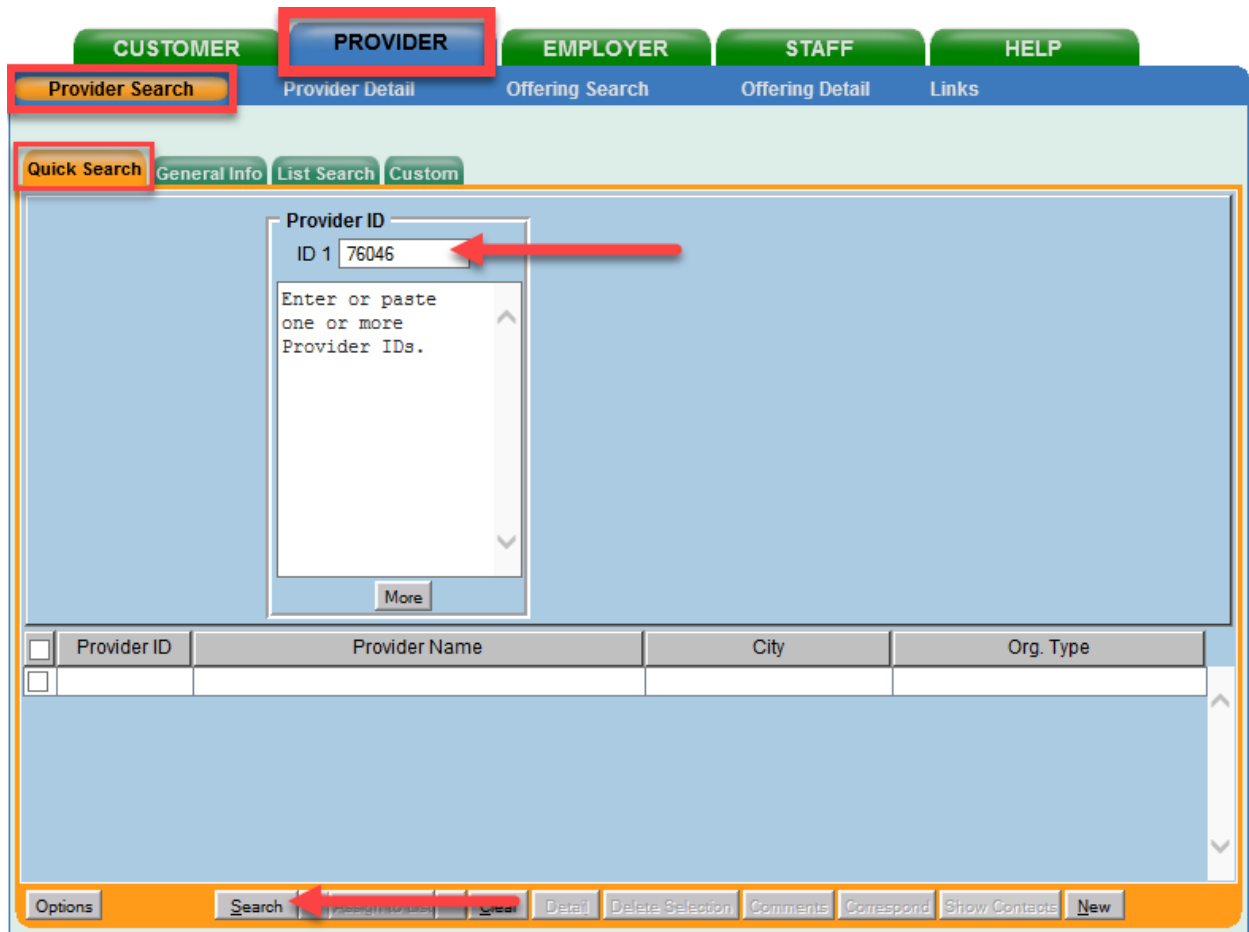
- Oneida/Herkimer/Madison Counties
- Monroe County/Rochester WDB

PROVIDER DATA ENTRY

For OJT and/or customized trainings, the local area will need to create the provider record in OSOS. Classroom training provider records should already exist in OSOS as part of the Eligible Training Provider List (ETPL).

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 section. If the Provider ID is known, you can enter the ID number on the Quick Search tab and click “Search” at the bottom.



If you do not know the Provider ID number, navigate to “General Info” tab (second tab from the left). Type in the Provider Name and click “Search” at the bottom. If the system returns “No Matches Found” (top right), you will need to create the provider record.

! NOTE: 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 such as “Town of Hempstead” or “Hempstead, Town of” etc.

The screenshot shows the OSOS interface for searching providers. The main navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Under the PROVIDER tab, there are sub-tabs for Provider Search, Provider Detail, Offering Search, Offering Detail, and Links. The 'General Info' sub-tab is selected. The search results area displays 'No Matches Found'. The search criteria form includes fields for Status (Active), Provider Name (SP - Town of Hempstead), City, Service Category, Service Type, CIP Code, WIB, Organization Type, Federal Provider ID (FEIN), and State Provider ID (EIN). The 'Search' button at the bottom is highlighted with a red arrow.

To create a new provider record, click on the “New” button at the bottom right of this screen.

This close-up shows the bottom toolbar of the OSOS interface. The buttons include Options, Search, Assign to List, Clear, Detail, Delete Selection, Comments, Correspond, Show Contacts, and New. The 'New' button is highlighted with a red arrow.

OSOS will automatically navigate to the Provider Detail section of the Provider module. Enter all known information in the “Provider Info” section on the left. Only fields marked with a green dot are required. Next, enter the physical location of the training provider, by clicking the “New Location” button. You may enter more than one location if necessary. Click “Save” at the bottom of the page after all necessary information is entered.

! 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.

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

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

SP - Town of Hempstead ID: 1 of 0

General Info Contact Info Services Service Performance Comments Attachments

Provider Info

Provider Status Active
Federal ID (FEIN)
State ID (EIN)
Organization Type
● Provider Name SP - Town of Hempstead
Provider Phone Ext
Provider URL
Provider Email

Billing Address

● Street Address (line1) One Washington Street
Street Address (line2) 2nd Floor
● City Hempstead
● State New York
● Zip Code 11550

Locations

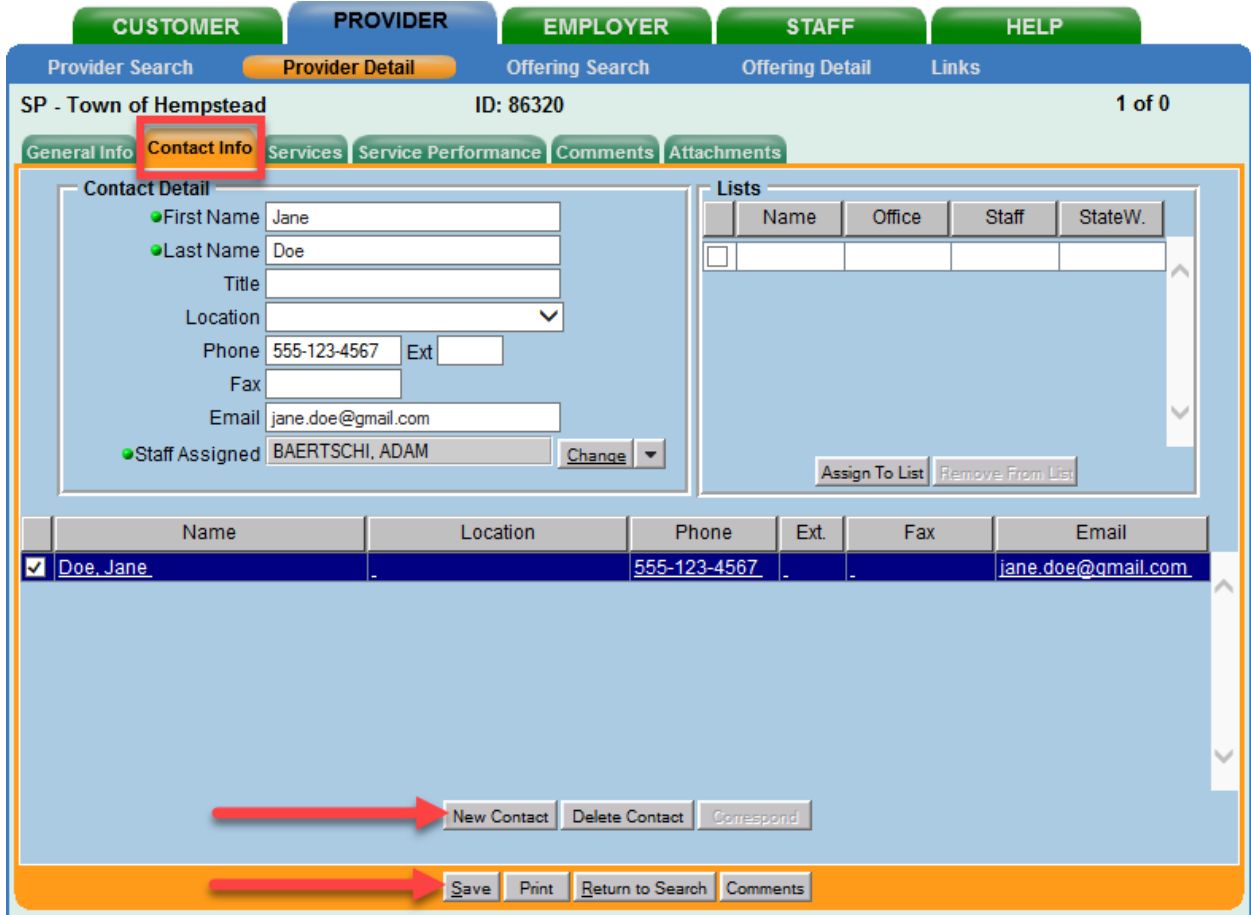
● Location Name Hempstead Works Career Center
● Street Address (line1) 50 Clinton Street
Street Address (line2) Suite 400
● City Hempstead
● State New York
● Zip Code 11550
Location Suffix
● WIB Hempstead/Long Beach

Location
<input checked="" type="checkbox"/> Hempstead Works Career Center

New Location Delete Location Copy Address Show Deletes

Save Print Return to Search Comments

Next, click on the “Contact Info” tab. Click on the “New Contact” button and enter the appropriate contact information for the provider. Click “Save.”



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

SP - Town of Hempstead ID: 86320 1 of 0

General Info **Contact Info** Services Service Performance Comments Attachments

Contact Detail

- First Name: Jane
- Last Name: Doe
- Title:
- Location:
- Phone: 555-123-4567 Ext:
- Fax:
- Email: jane.doe@gmail.com
- Staff Assigned: BAERTSCHI, ADAM [Change](#)

Lists

	Name	Office	Staff	StateW.
<input type="checkbox"/>				

[Assign To List](#) [Remove From List](#)

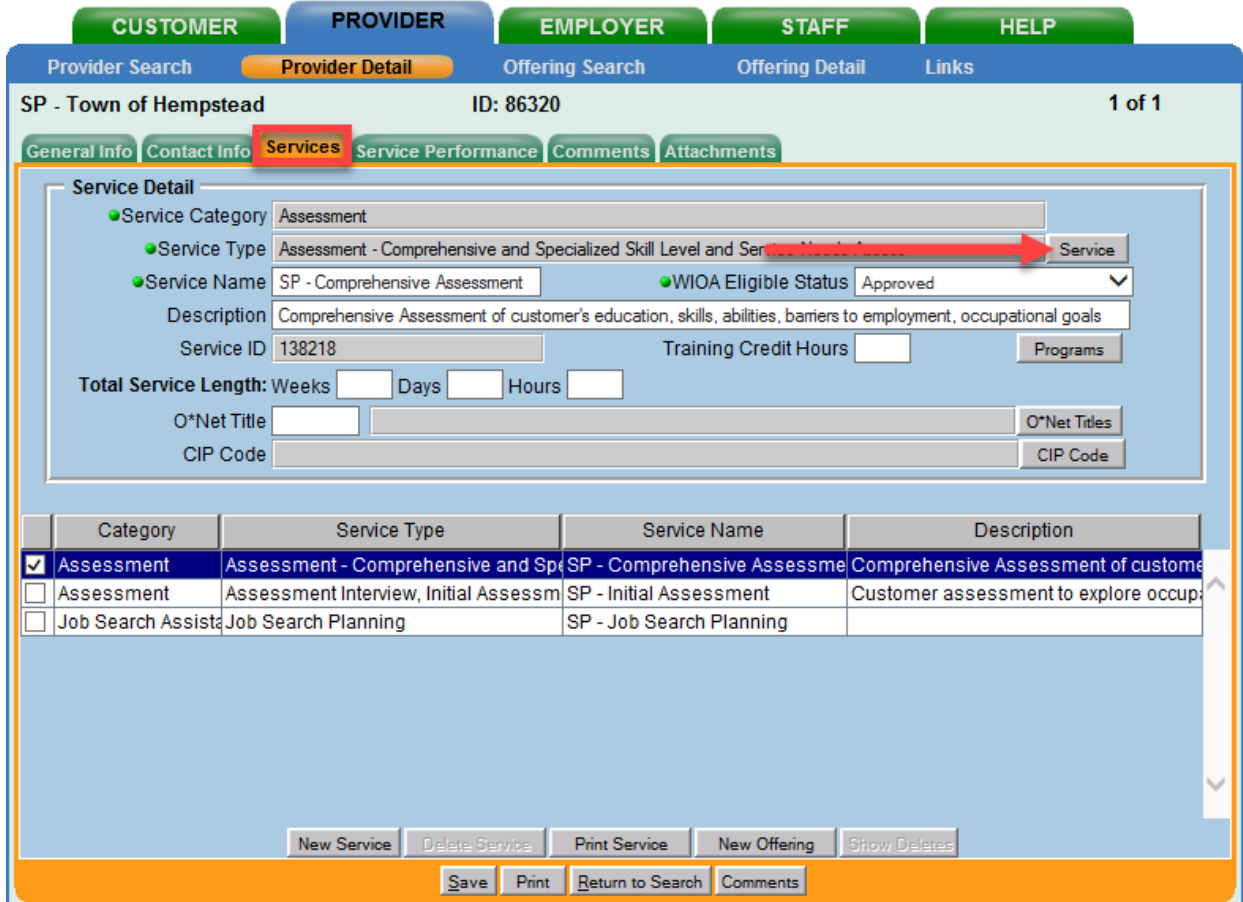
	Name	Location	Phone	Ext.	Fax	Email
<input checked="" type="checkbox"/>	Doe, Jane		555-123-4567			jane.doe@gmail.com

[New Contact](#) [Delete Contact](#) [Correspond](#)

[Save](#) [Print](#) [Return to Search](#) [Comments](#)

CREATING A PROVIDER SERVICE

In the “Services” tab of the appropriate provider, click on the “New Service” button. Click on the “Services” button on the right to search for and add a service type.



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

SP - Town of Hempstead ID: 86320 1 of 1

General Info | Contact Info | **Services** | Service Performance | Comments | Attachments

Service Detail

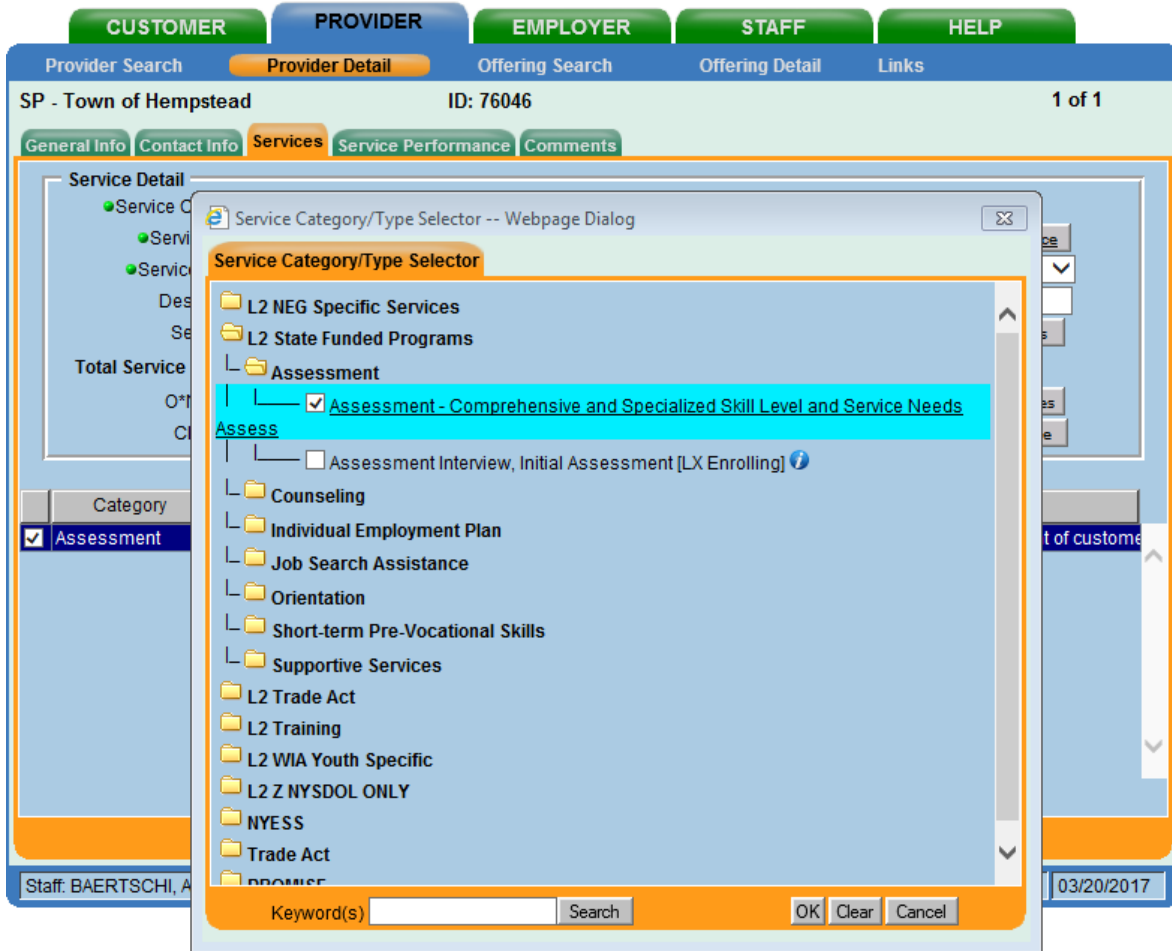
- Service Category: Assessment
- Service Type: Assessment - Comprehensive and Specialized Skill Level and Service **Service**
- Service Name: SP - Comprehensive Assessment
- WIOA Eligible Status: Approved
- Description: Comprehensive Assessment of customer's education, skills, abilities, barriers to employment, occupational goals
- Service ID: 138218
- Training Credit Hours: []
- Programs: []
- Total Service Length: Weeks [] Days [] Hours []
- O*Net Title: []
- CIP Code: []

	Category	Service Type	Service Name	Description
<input checked="" type="checkbox"/>	Assessment	Assessment - Comprehensive and Specialized Skill Level and Service	SP - Comprehensive Assessment	Comprehensive Assessment of customer's education, skills, abilities, barriers to employment, occupational goals
<input type="checkbox"/>	Assessment	Assessment Interview, Initial Assessment	SP - Initial Assessment	Customer assessment to explore occupational interests, skills, and abilities
<input type="checkbox"/>	Job Search Assistance	Job Search Planning	SP - Job Search Planning	Assistance with job search process, including resume writing, interview preparation, and job search strategies

New Service | Delete Service | Print Service | New Offering | Show Deletes

Save | Print | Return to Search | Comments

You may type in a keyword in the search box at the bottom of the pop up window or find the service type by clicking on the nested folders. Once you find the appropriate service, check the corresponding box and click “OK.”



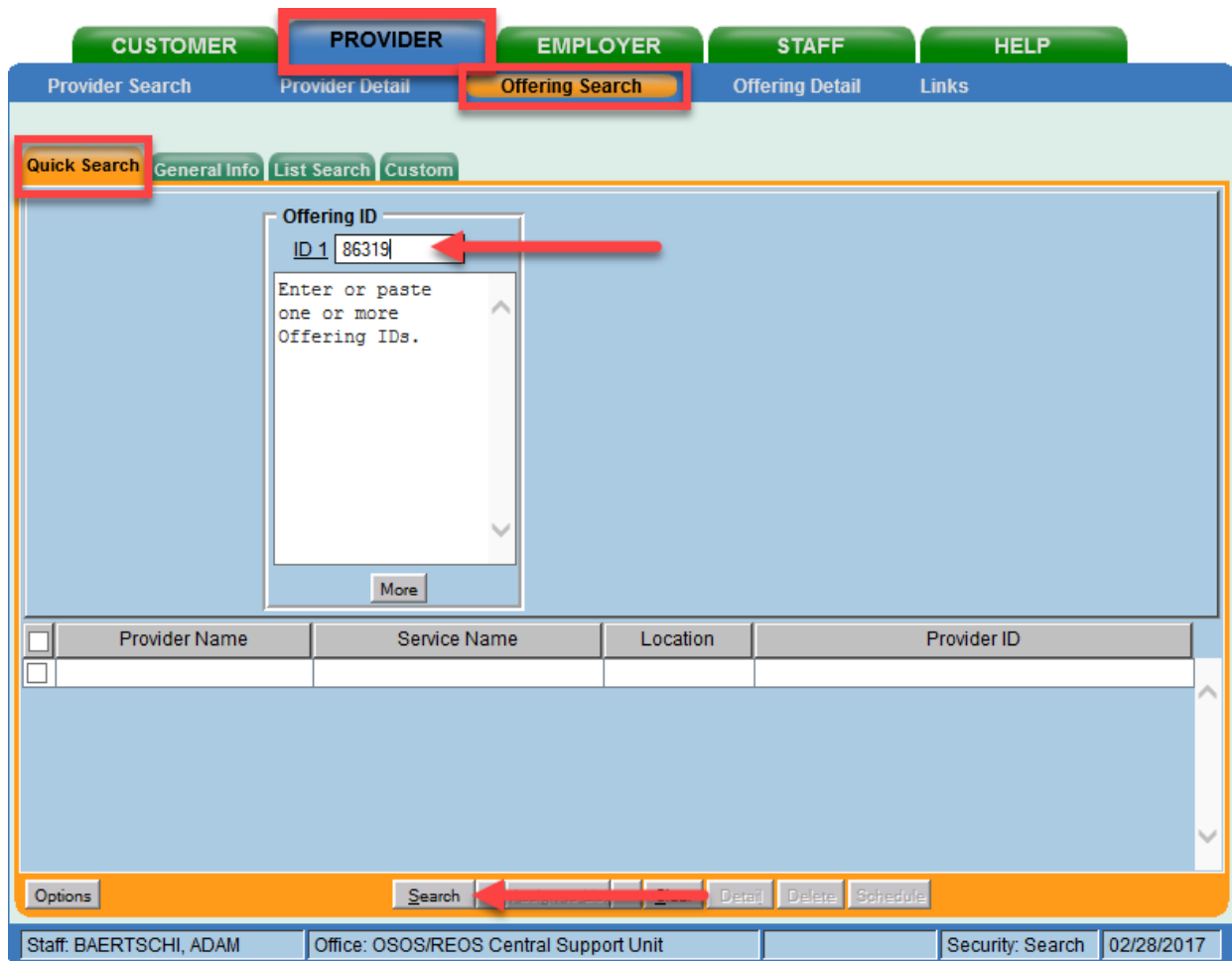
Enter the **Service Name**.

! NOTE: 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 – Comprehensive Assessment.”

Choose “Approved” in the **WIOA Eligible Status** drop down menu. Enter a description (optional) in the **Description** field and click “Save.”

CREATING AN OFFERING

The training/service offered by the provider, combined with the location 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 section of the PROVIDER module. If you know the Offering ID number, you can type it in the search box on the Quick Search tab.



The screenshot shows the OSOS PROVIDER module interface. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The PROVIDER tab is selected. Below this, there are sub-tabs: Provider Search, Provider Detail, Offering Search, Offering Detail, and Links. The Offering Search sub-tab is highlighted. Underneath, there are further sub-tabs: Quick Search, General Info, List Search, and Custom. The Quick Search sub-tab is selected. The main content area features a search box labeled 'Offering ID' with the text 'ID 1 86319' entered. A red arrow points to this text. Below the search box is a text area with the instruction 'Enter or paste one or more Offering IDs.' and a 'More' button. At the bottom of the main content area, there is a table with columns for Provider Name, Service Name, Location, and Provider ID. A 'Search' button is highlighted with a red arrow. The bottom status bar shows 'Staff: BAERTSCHI, ADAM', 'Office: OSOS/REOS Central Support Unit', 'Security: Search', and '02/28/2017'.

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.”

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. Under the Offering Search tab, there are three sub-tabs: Quick Search, General Info (highlighted with a red box), List Search, and Custom. The main form area contains several input fields: Location (WIB dropdown and City text box), Start Date Range (From and To text boxes), Provider Information (Provider Name text box containing 'SP - Town of Hempstead', Program dropdown, Provider Status dropdown set to 'Active', and Service Type text box with a 'Service Type' button). Below the form is a table with columns: Provider Name, Service Name, Location, Start Date, Start Time, End Date, and End Time. At the bottom of the screen, there are buttons: Options, Search (highlighted with a red arrow), Clear, Detail, Delete, and Schedule.

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.

Select the service you wish to create the offering for and click the “New Offering” button.

The screenshot shows the OSOS interface for a Provider. 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 header displays "SP - Town of Hempstead" and "ID: 76046" with "1 of 1" on the right. A secondary navigation bar includes General Info, Contact Info, Services (selected), Service Performance, and Comments. The "Service Detail" section contains several fields: Service Category (Assessment), Service Type (Assessment - Comprehensive and Specialized Skill Level and Service Needs Assess), Service Name (Comprehensive Assessment), Description (Comprehensive Assessment), Service ID (98667), Training Credit Hours, Total Service Length (Weeks, Days, Hours), O*Net Title, and CIP Code. Below this is a table with columns for Category, Service Type, Service Name, and Description. The first row is selected and has a checkmark in the first column. At the bottom of the main content area, there are buttons for New Service, Delete Service, Print Service, and New Offering (highlighted with a red arrow). Below these are buttons for Save, Print, Return to Search, and Comments. The footer contains staff information: Staff: BAERTSCHI, ADAM; Office: OSOS/REOS Central Support Unit; Security: Delete; 03/21/2017.

Category	Service Type	Service Name	Description
<input checked="" type="checkbox"/>	Assessment	Assessment - Comprehensive and Sp	Comprehensive Assessment

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.

The screenshot shows the 'Offering Detail' page for a 'Comprehensive Assessment' with Offering ID: 1 of 0. The form is divided into several sections:

- Provider Info:** Provider Name: SP - Town of Hempstead; Service Category: Assessment; Service Type: Assessment - Comprehensive and Specialized Skill Level and Se; Service Description: Comprehenisve Assessment.
- Location:** Location: Town of Hempstead; Address: Town of Hempstead Locataion 2; City: Hempstead; State: New York; Zip: 12240; WIB: NYSDOL - CO.
- Schedule:** Start Date, End Date, Start Time, End Time fields. Day selection: Sun. , Mon. , Tue. , Wed. , Thu. , Fri. , Sat. .
- Additional Info:** Cost: \$ 1.00; Available Seats: [empty].
- Description:** [empty text area]

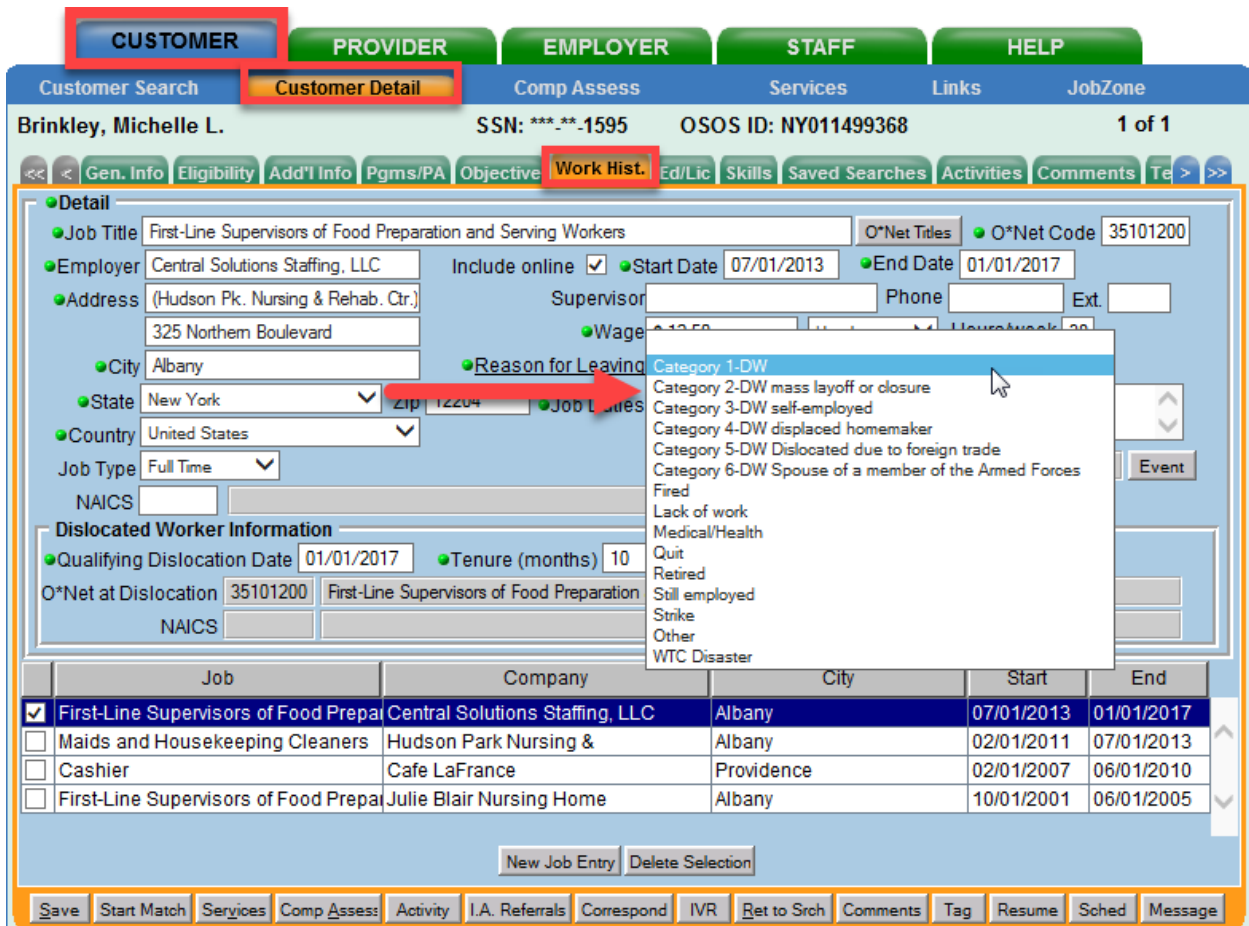
At the bottom, there are buttons for 'Save Single', 'Return to Search', and 'Return to Services'. The footer shows: Staff: BAERTSCHI, ADAM; Office: OSOS/REOS Central Support Unit; Unsaved Changes; Security: Delete; 03/21/2017.

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. Start by conducting a Customer Search in the CUSTOMER module, Customer Search section, and “Quick Search” tab.

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

! Note: An eligible participant **MUST** be a categorized dislocated worker. Dislocated worker status is documented on the “Work History” tab within the “Customer Detail” section 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 shows the OSOS Customer Detail page for Brinkley, Michelle L. The 'Work Hist.' tab is selected, and the 'Reason for Leaving' dropdown menu is open, showing various categories for dislocated workers. A red arrow points to the 'Reason for Leaving' field.

Customer Detail Information:

- Job Title: First-Line Supervisors of Food Preparation and Serving Workers
- Employer: Central Solutions Staffing, LLC
- Address: (Hudson Pk. Nursing & Rehab. Ctr.) 325 Northern Boulevard, Albany, New York, United States
- City: Albany
- State: New York
- Country: United States
- Job Type: Full Time
- Start Date: 07/01/2013
- End Date: 01/01/2017
- O*Net Code: 35101200
- Reason for Leaving: **Category 1-DW**

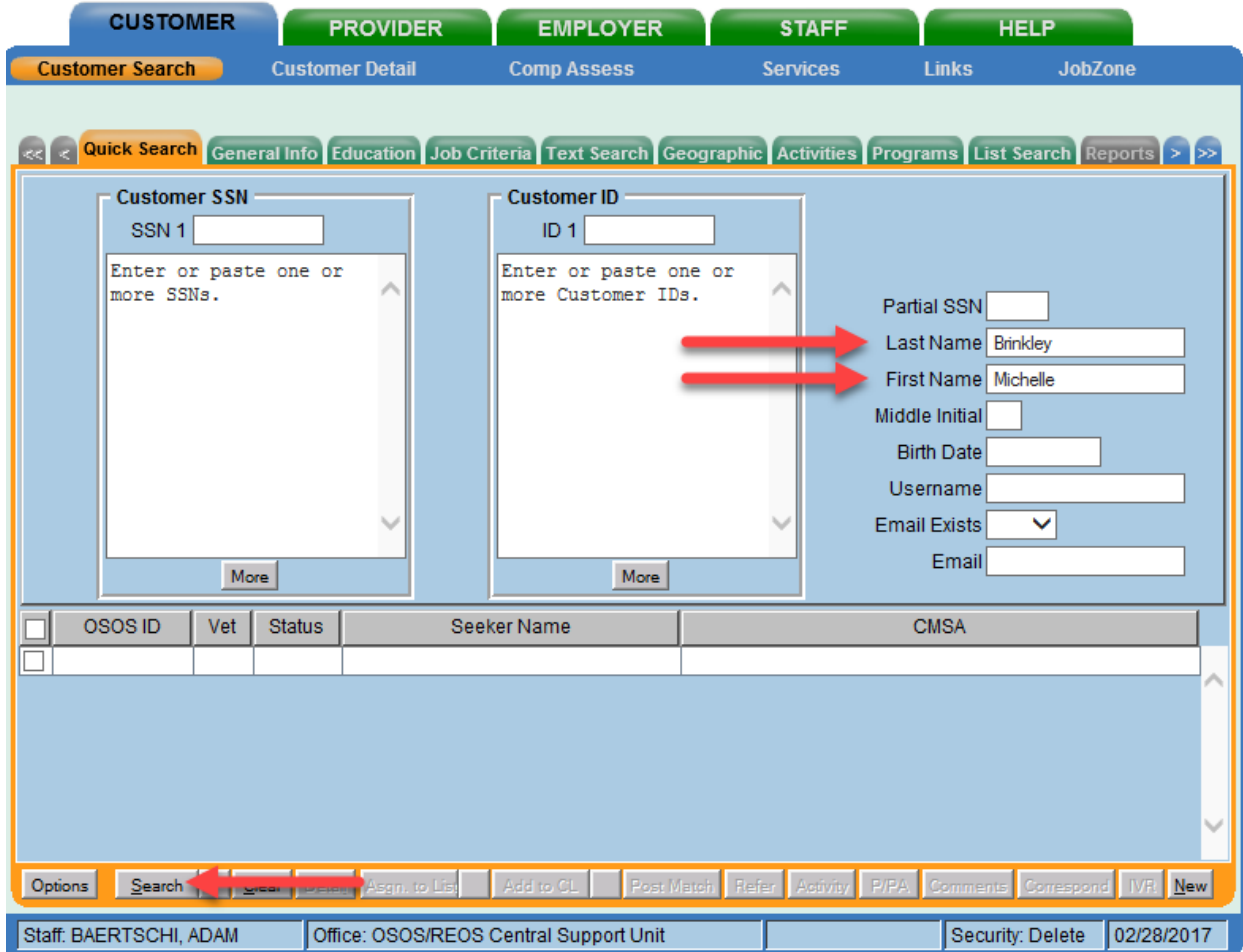
Dislocated Worker Information:

- Qualifying Dislocation Date: 01/01/2017
- Tenure (months): 10
- O*Net at Dislocation: 35101200
- First-Line Supervisors of Food Preparation

Job	Company	City	Start	End
<input checked="" type="checkbox"/> First-Line Supervisors of Food Prepa	Central Solutions Staffing, LLC	Albany	07/01/2013	01/01/2017
<input type="checkbox"/> Maids and Housekeeping Cleaners	Hudson Park Nursing &	Albany	02/01/2011	07/01/2013
<input type="checkbox"/> Cashier	Cafe LaFrance	Providence	02/01/2007	06/01/2010
<input type="checkbox"/> First-Line Supervisors of Food Prepa	Julie Blair Nursing Home	Albany	10/01/2001	06/01/2005

! Note: 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.



Navigate to the “Services” (1) section and then the “Services” tab (2) of the customer record. Click on the “New Service” (3) button at the bottom.

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

Customer Search Customer Detail Comp Ass **1.** **Services** Links JobZone

Brinkley, Michelle L. SSN: ***-**-1595 OSOS ID: NY011499368

Agency Info Achievement Ob **2.** **Services** Service history Enrollments Outcomes Empl. Outcomes Trng. Outcom >>

Detail

Service Name: SS/IO Provider Service
 Service Desc.: SS/IO Provider Service
 Service ID: 75885
 Service Type: Utilizing Resource Rooms (Self Service)
 Provider Name: SS/IO Provider
 Location Name: Self Service Info Only
 Provider ID: 66244 Offering ID: 81999
 Plan. Start Date: 06/12/2014 Plan. End Date: 06/12/2014
 Actual Start Date: 06/12/2014 Actual End Date: 06/12/2014
 Completed Successfully:
 Next Contact Date:
 Program Service Type: Basic Career Services
 Part Time Learn.: Distance Learn.:

Funding

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

Total Funding: Add Edit Delete
 Petition #:
 RR Event #:
 Incumbent Worker Waivers:

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 Sves. 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

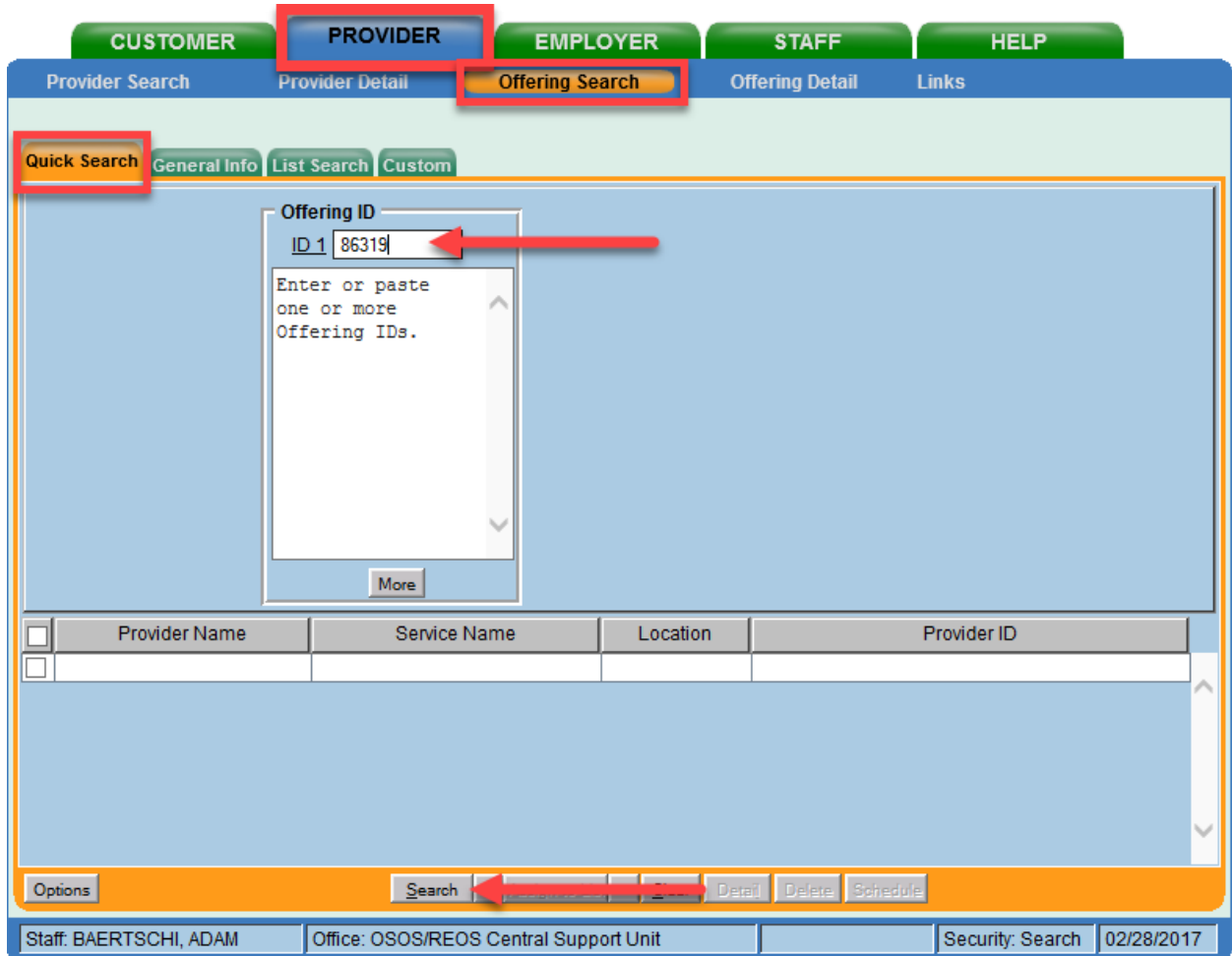
3.

Options Print List **New Service** IPA Service Summary Payments Tracking Change Actual Cost

Save Customer Detail Comp Assess Comments Check Labor Market Information

Staff: BAERTSCHI, ADAM Office: OSOS/REOS Central Support Unit Security: Delete 02/03/2017

After you click on the “New Service” button, OSOS will automatically navigate to the PROVIDER module. Within the PROVIDER module, OSOS will start in the Offering Search section and the “Quick Search” tab. If you know the **Offering ID** number, type it in the search box and click “Search.”



! Note: For OJT, Customized Training, or Career Services, provider information is manually added to OSOS, as discussed above. Classroom training must be listed in the ETPL (Eligible Training Provider List) as specified by the designation ETPL Auto Load. For this reason, the process of adding a service to the customer record is slightly different for classroom training, as detailed below.

CAREER SERVICES

If the **Offering ID** is not known, click on the “General Info” tab. Enter any known information in the available data fields. OSOS allows you to enter a partial name for the **Provider Name**, **Service Name** fields. You can also select the **Program** or **Service Type** from the corresponding drop down menu. Click “Search.”

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

1 - 2 of 2

Quick Search **General Info** List Search Custom

Location
WIB Hempstead/Long Beach 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
<input checked="" type="checkbox"/>	SP - Town of Hempstead	Comprehensive Assessment	Hempstead Location 2
<input type="checkbox"/>	SP - Town of Hempstead	Comprehensive Assessment	Hempstead Works Career Center

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

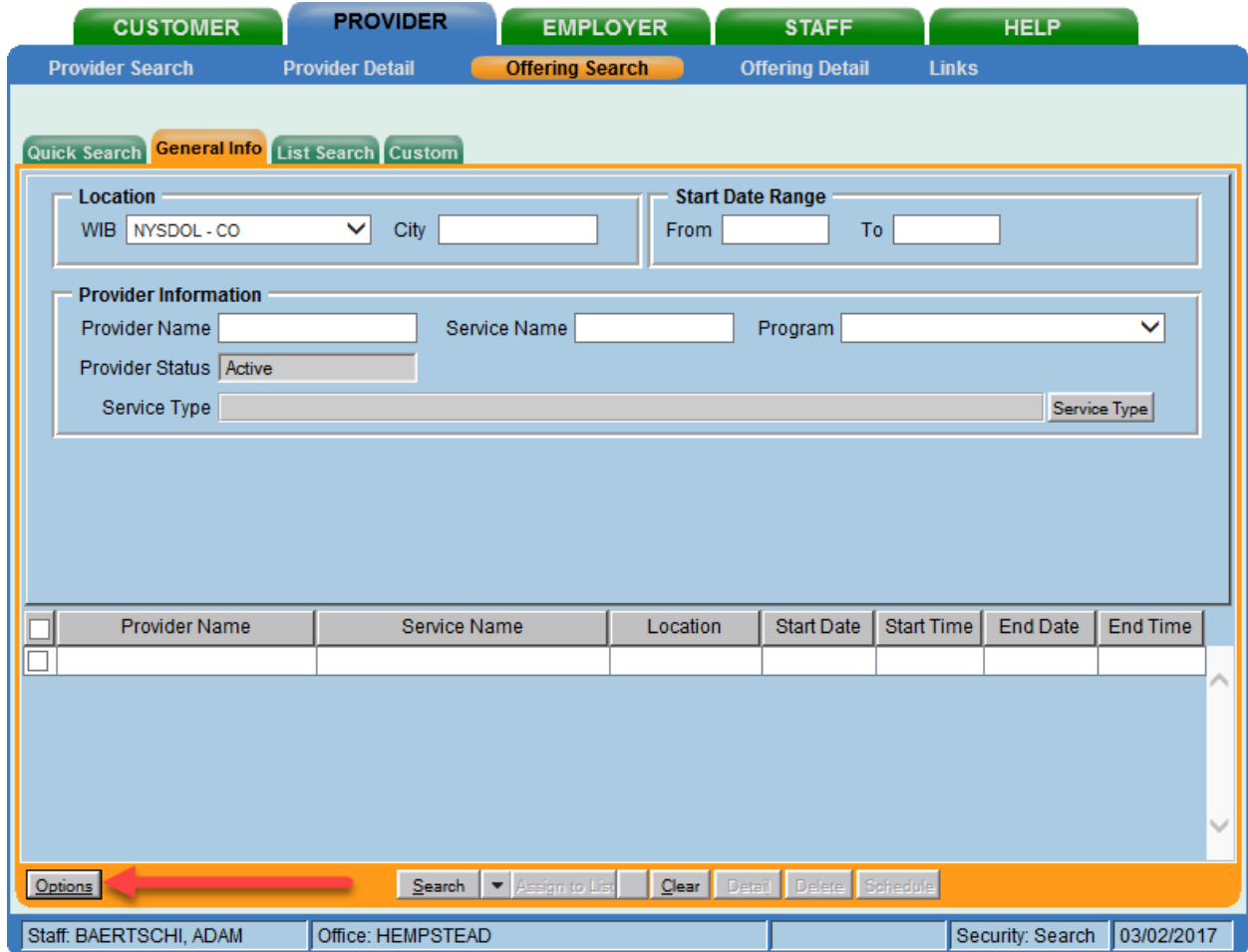
Staff: BAERTSCHI, ADAM Office: Hempstead Works Security: Search 03/21/2017

Select the appropriate offering and click the “Schedule” button at the bottom.

! Note: 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.

OJT/CUSTOMIZED TRAINING/CLASSROOM TRAINING

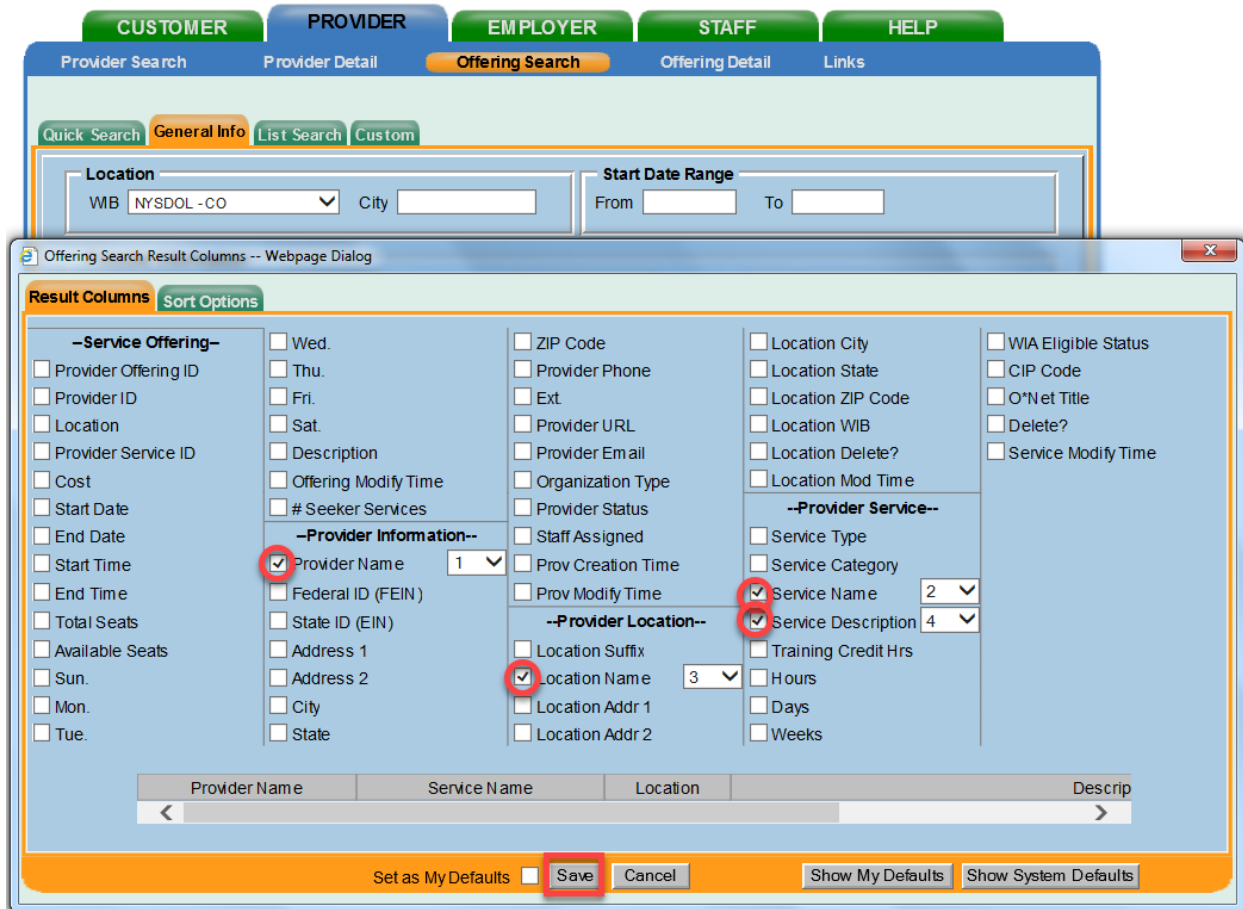
If the **Offering ID** is not known, click on the “General Info” tab. Before conducting a search, click on the “Options” button at the bottom of the screen.



The screenshot displays the 'Offering Search' interface within the OSOS application. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, a secondary navigation bar shows Provider Search, Provider Detail, Offering Search (highlighted), Offering Detail, and Links. The main content area features a 'Quick Search' section with tabs for General Info (selected), List Search, and Custom. The search form includes fields for Location (WIB NYSDOL - CO), City, Start Date Range (From/To), Provider Name, Service Name, Program, Provider Status (Active), and Service Type. Below the form is a table with columns: Provider Name, Service Name, Location, Start Date, Start Time, End Date, and End Time. At the bottom, a row of buttons includes Options (highlighted with a red arrow), Search, Assign to List, Clear, Detail, Delete, and Schedule. The footer shows Staff: BAERTSCHI, ADAM, Office: HEMPSTEAD, Security: Search, and the date 03/02/2017.

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.”

! Tip: 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.



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. You can also select the **Program** or **Service Type** from the corresponding drop down menu. Click “Search.”

The search results will now display with the four categories chosen from the “Options” menu. OJT, customized trainings, and classroom trainings must be ETP Auto loaded. You can now quickly determine which services have been ETP auto loaded by looking under the **Description** category.

! Note: 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.

By clicking “Schedule,” the service will be added to the customer’s record, under the “Service” tab. OSOS will navigate to the “Services” tab automatically.

Select the service and complete the following data entry in the “Detail” window (left hand side).

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.

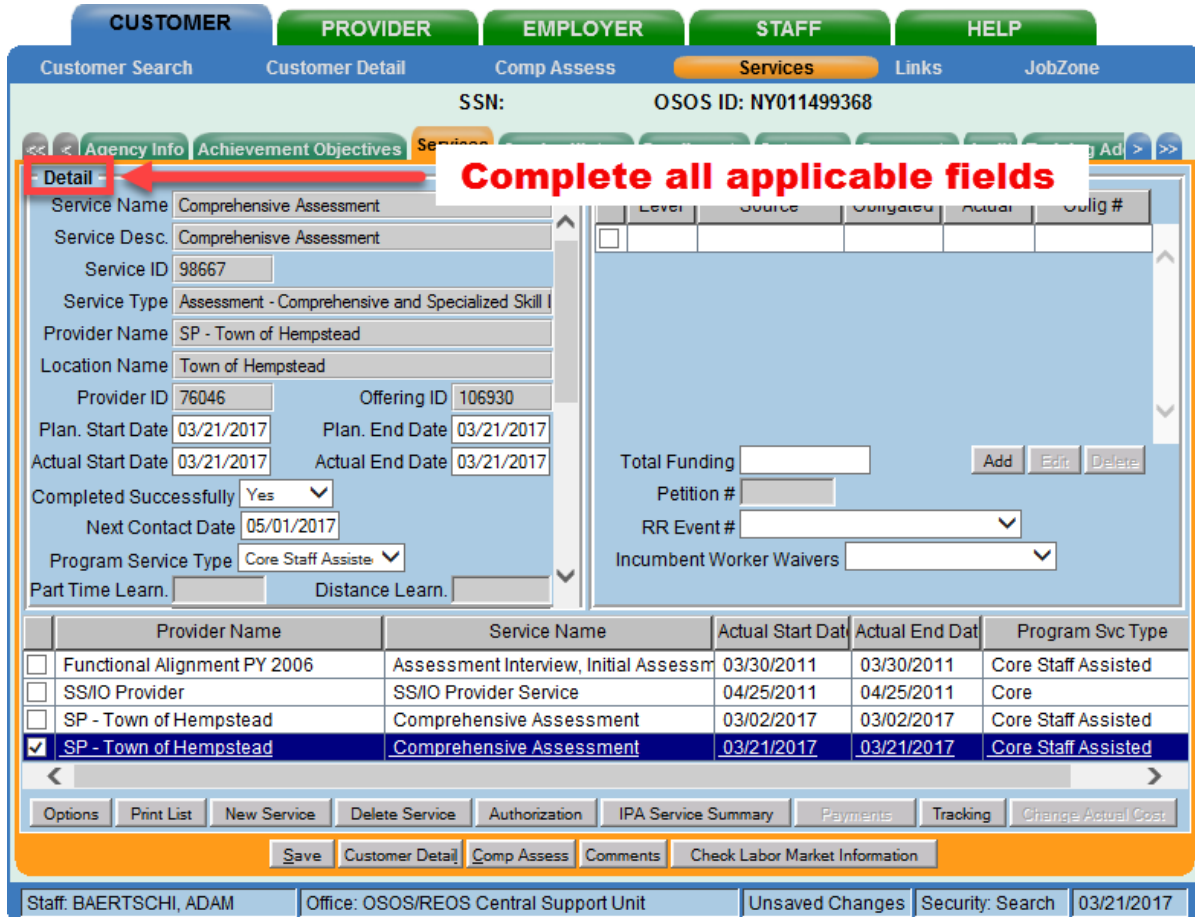
Program Service Type – Select the appropriate program service type corresponding to the type of service.

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 on the “Change Office” button to update.

! Note: 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.



The screenshot shows the OSOS Services Detail form. A red callout box with the text "Complete all applicable fields" points to the "Detail" tab. The form contains the following information:

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

SSN: OSOS ID: NY011499368

Agency Info | Achievement Objectives | **Services** | Ad >>

Detail

Service Name: Comprehensive Assessment
 Service Desc: Comprehensive Assessment
 Service ID: 98667
 Service Type: Assessment - Comprehensive and Specialized Skill I
 Provider Name: SP - Town of Hempstead
 Location Name: Town of Hempstead
 Provider ID: 76046 Offering ID: 106930
 Plan. Start Date: 03/21/2017 Plan. End Date: 03/21/2017
 Actual Start Date: 03/21/2017 Actual End Date: 03/21/2017
 Completed Successfully: Yes
 Next Contact Date: 05/01/2017
 Program Service Type: Core Staff Assiste
 Part Time Learn. Distance Learn.

Total Funding [] Add Edit Delete
 Petition # []
 RR Event # []
 Incumbent Worker Waivers []

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Functional Alignment PY 2006	Assessment Interview, Initial Assessm	03/30/2011	03/30/2011	Core Staff Assisted
<input type="checkbox"/>	SS/IO Provider	SS/IO Provider Service	04/25/2011	04/25/2011	Core
<input type="checkbox"/>	SP - Town of Hempstead	Comprehensive Assessment	03/02/2017	03/02/2017	Core Staff Assisted
<input checked="" type="checkbox"/>	SP - Town of Hempstead	Comprehensive Assessment	03/21/2017	03/21/2017	Core Staff Assisted

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

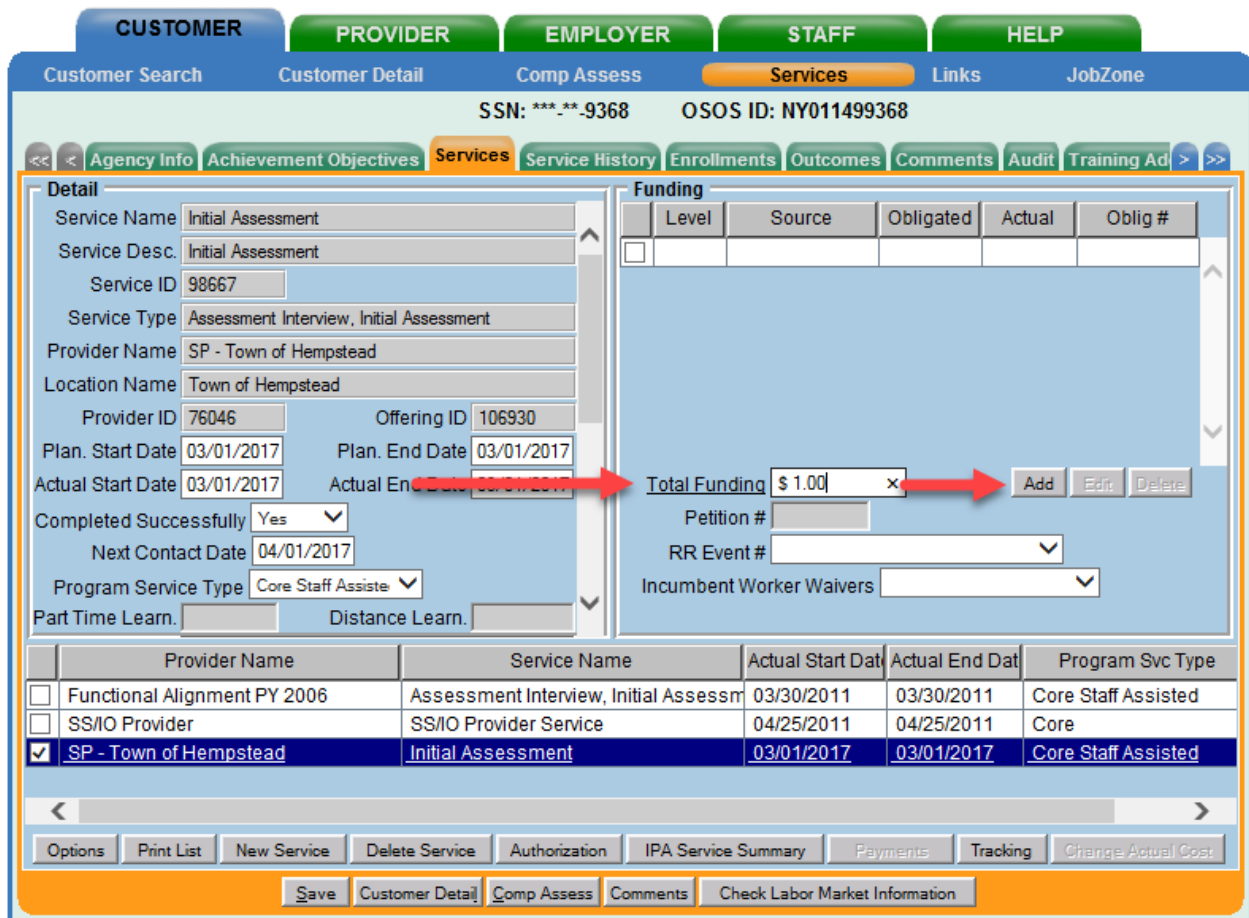
Save | Customer Detail | **Comp Assess** | Comments | Check Labor Market Information

Staff: BAERTSCHI, ADAM | Office: OSOS/REOS Central Support Unit | Unsaved Changes | Security: Search | 03/21/2017

ADD FUNDING

Next, complete the funding section (right-hand side) for the service. To do this, enter \$1.00 in the **Total Funding** field. Click the “Add” button.

! Note: 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.

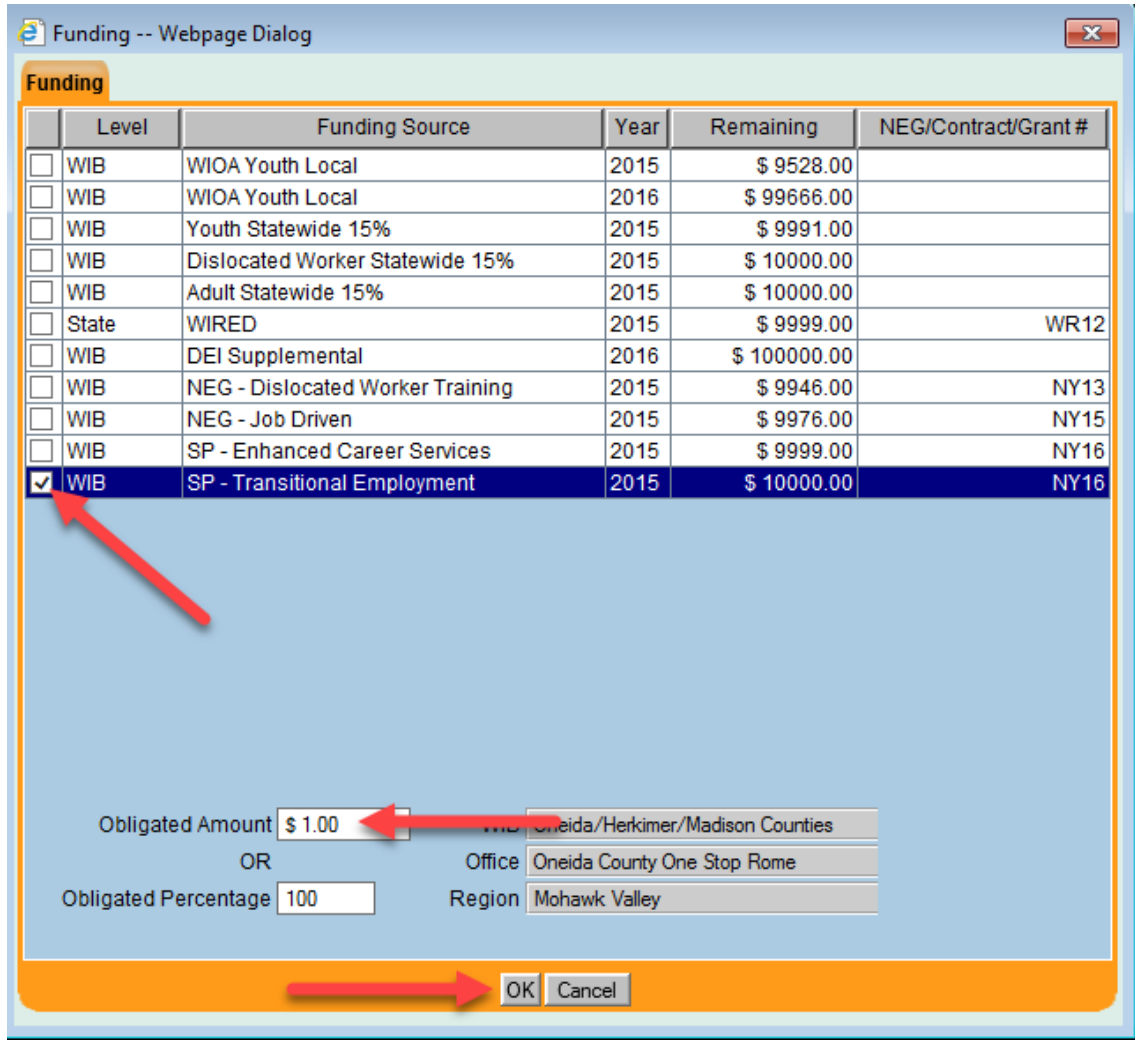


The screenshot shows the OSOS interface for a service. The 'Services' tab is active, and the 'Funding' section is visible on the right. The 'Total Funding' field is set to '\$ 1.00', and the 'Add' button is highlighted with a red arrow. The 'Detail' section on the left shows service information for 'Initial Assessment'.

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

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	Core Staff Assisted
<input type="checkbox"/> SS/IO Provider	SS/IO Provider Service	04/25/2011	04/25/2011	Core
<input checked="" type="checkbox"/> SP - Town of Hempstead	Initial Assessment	03/01/2017	03/01/2017	Core Staff Assisted

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



The screenshot shows a window titled "Funding -- Webpage Dialog" with a table of funding sources and a form below it. A red arrow points to the checkbox for "SP - Transitional Employment" in the table. Another red arrow points to the "Obligated Amount" field, which contains "\$ 1.00". A third red arrow points to the "OK" button at the bottom of the dialog.

	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
<input type="checkbox"/>	WIB	WIOA Youth Local	2015	\$ 9528.00	
<input type="checkbox"/>	WIB	WIOA Youth Local	2016	\$ 99666.00	
<input type="checkbox"/>	WIB	Youth Statewide 15%	2015	\$ 9991.00	
<input type="checkbox"/>	WIB	Dislocated Worker Statewide 15%	2015	\$ 10000.00	
<input type="checkbox"/>	WIB	Adult Statewide 15%	2015	\$ 10000.00	
<input type="checkbox"/>	State	WIRED	2015	\$ 9999.00	WR12
<input type="checkbox"/>	WIB	DEI Supplemental	2016	\$ 100000.00	
<input type="checkbox"/>	WIB	NEG - Dislocated Worker Training	2015	\$ 9946.00	NY13
<input type="checkbox"/>	WIB	NEG - Job Driven	2015	\$ 9976.00	NY15
<input type="checkbox"/>	WIB	SP - Enhanced Career Services	2015	\$ 9999.00	NY16
<input checked="" type="checkbox"/>	WIB	SP - Transitional Employment	2015	\$ 10000.00	NY16

Obligated Amount: Office:
 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.

story Enrollments Outcomes Empl. Outcomes Trng. Outcom > >>

Funding

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

Total Funding

Petition #

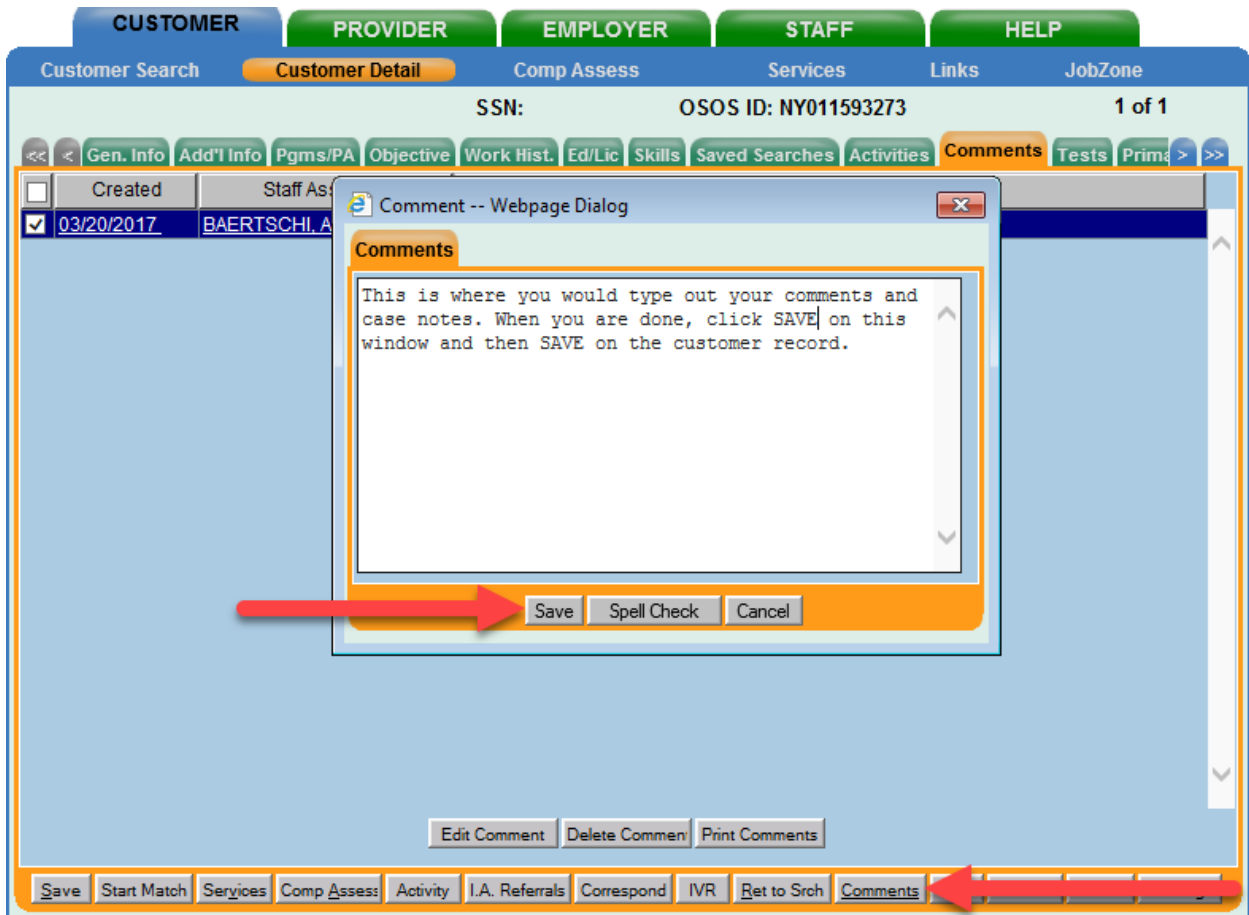
RR Event #

Incumbent Worker Waivers

ENTER COMMENTS

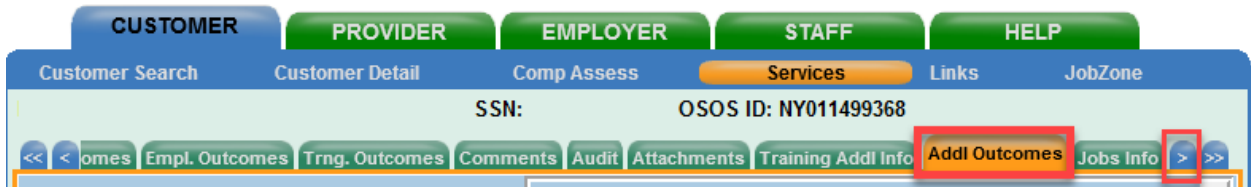
Comments are used to record case management notes. All users should record comments, details about services, and case notes that concern the customer being served.

Click on the **Comments** button at the bottom of the screen. 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.

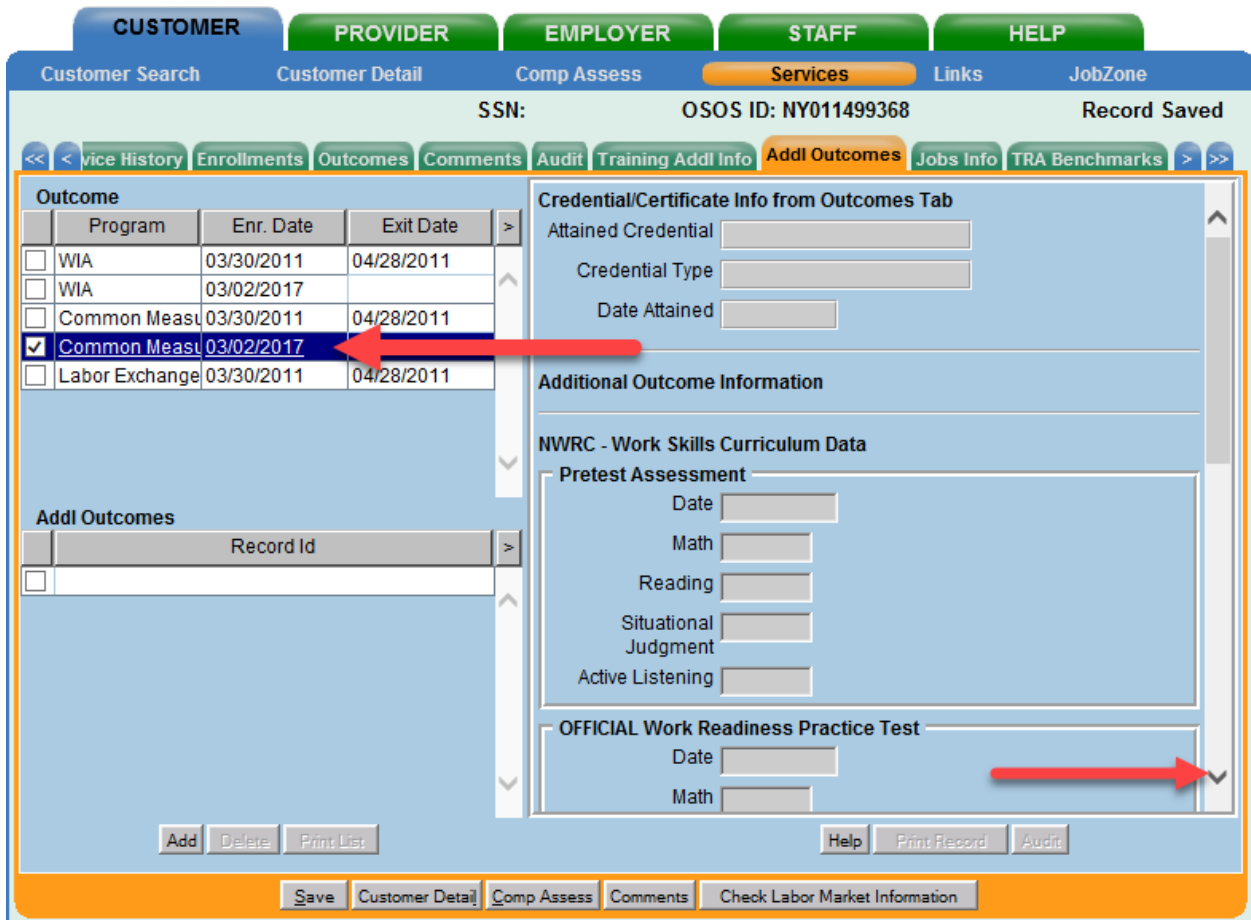


ENTER OUTCOMES

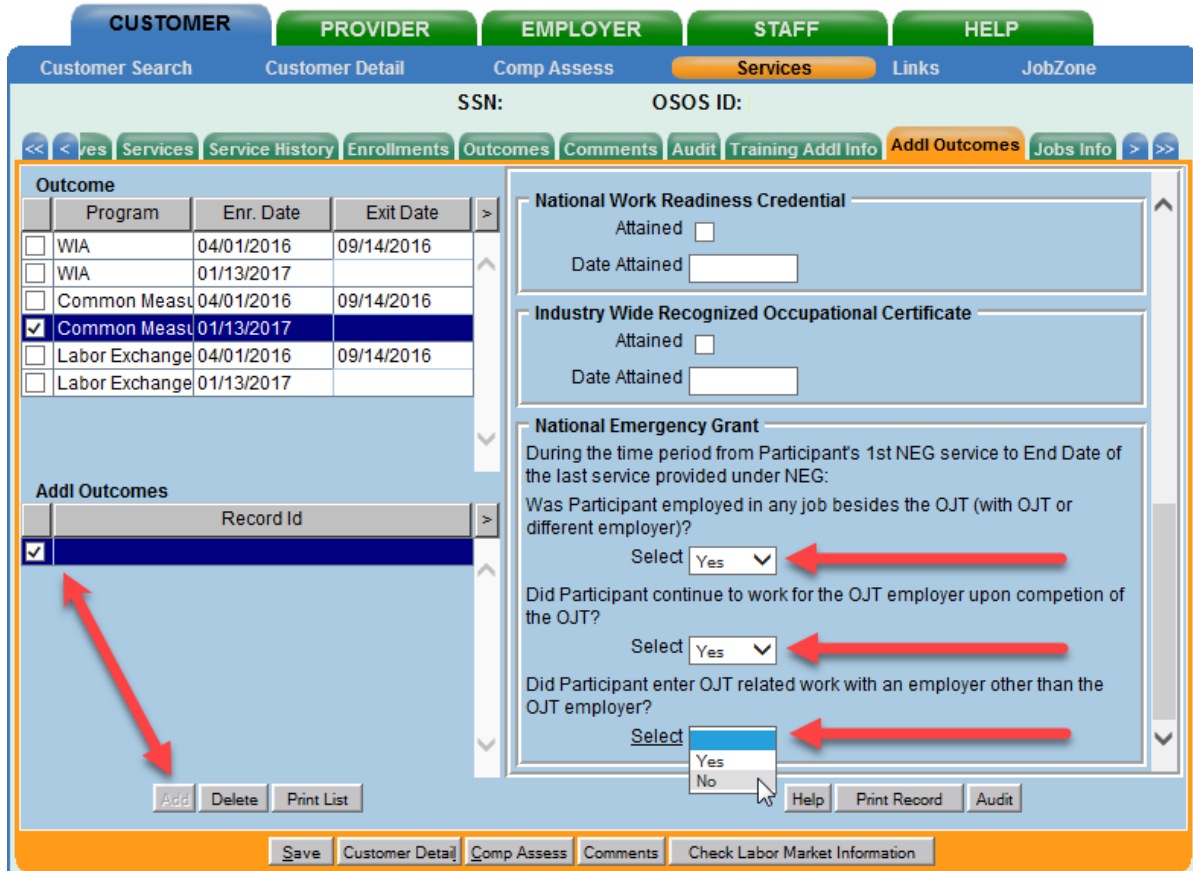
When a customer exits an enrollment (90 days after the last recorded enrolling service or activity), you must enter a training/service outcome. To enter the outcome, navigate to the “Services” section of the CUSTOMER module. Click on the single right arrow until the display window shows the “Addl Outcomes”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



On the “Addl Outcomes” tab, select “Common Measures” enrollment, under the “Program” column, 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.



The screenshot displays the OSOS 'Add Outcomes' interface. At the top, there are navigation tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services (highlighted), Links, and JobZone. The main area shows a table of existing outcomes and an 'Add Outcomes' table. A red arrow points to the 'Add' button in the 'Add Outcomes' table. The 'Add Outcomes' table has a 'Record Id' column and a checkbox. The right-hand side contains a form for entering details for the selected record. The form includes sections for 'National Work Readiness Credential', 'Industry Wide Recognized Occupational Certificate', and 'National Emergency Grant'. The 'National Emergency Grant' section contains three questions, each with a 'Select' dropdown menu. Three red arrows point to the 'Yes' selection in each of these dropdown menus. At the bottom of the form, there are buttons for 'Add', 'Delete', 'Print List', 'Help', 'Print Record', and 'Audit'. The bottom of the screen has a navigation bar with buttons for 'Save', '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:
<http://labor.ny.gov/workforcenypartners/osos.shtm>

For further assistance, please contact the OSOS Help Desk:
 By phone: (518) 457-6586
 By email: help.osos@labor.ny.gov