OSOS Data Entry Guide:
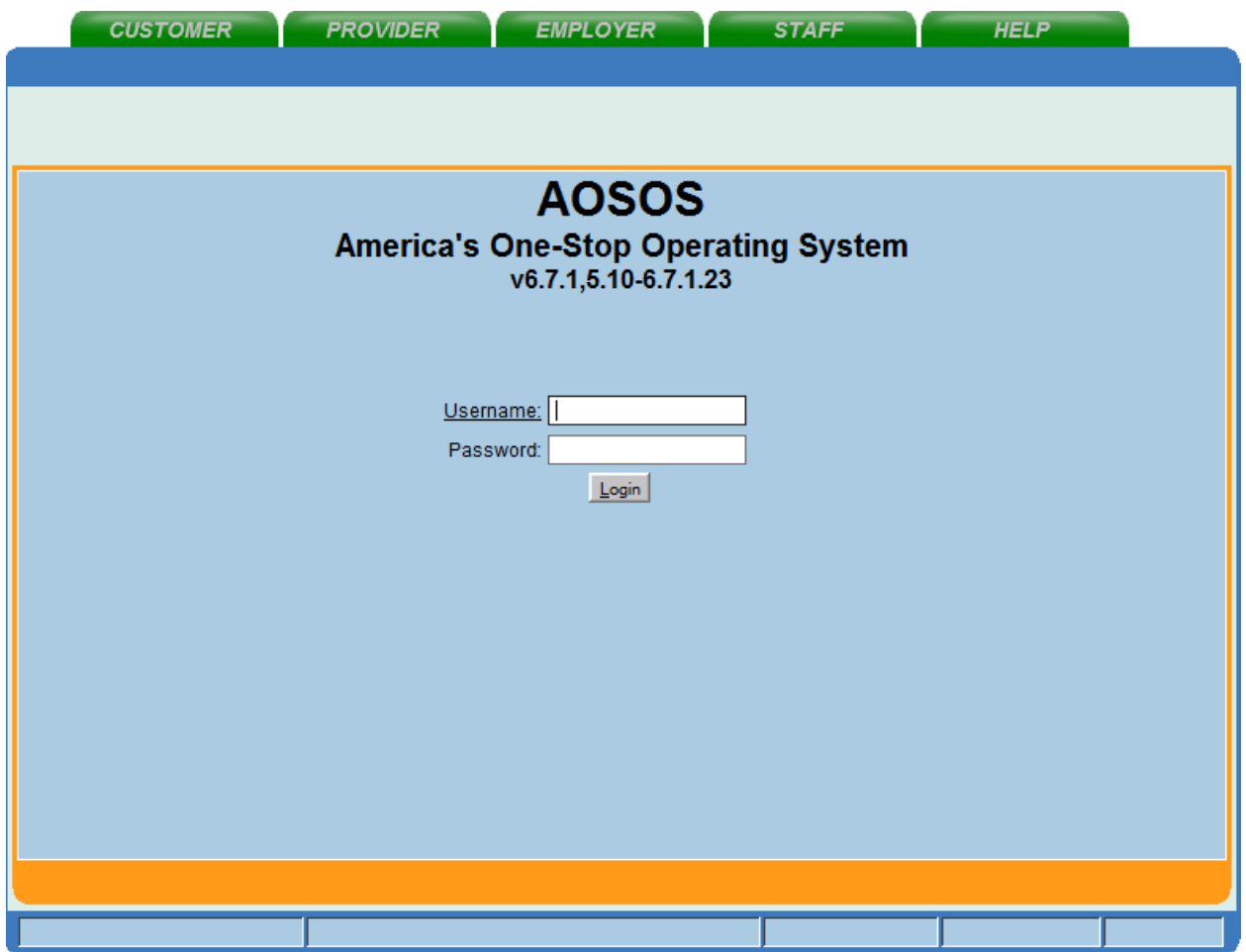
Sector Partnership National Emergency Grant – Transitional Employment for Dislocated Workers

Table of Contents

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.

| ASSESMENT | PLAN OF ACTION | OUTCOME |
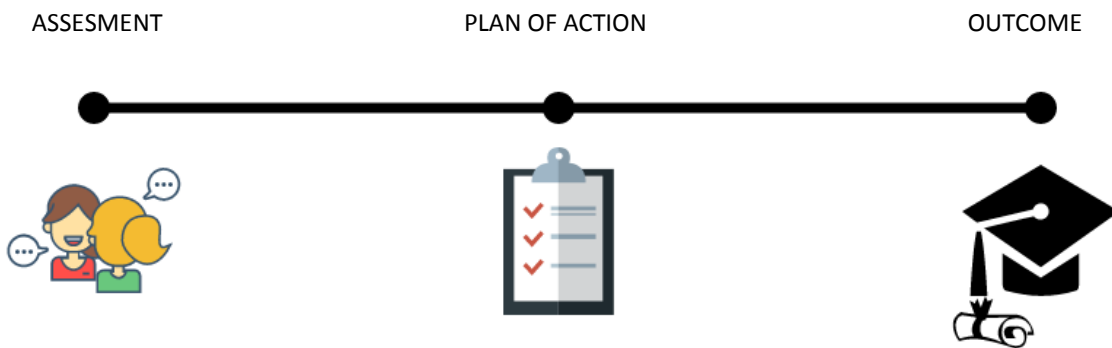
This guide will provide detailed instructions on how to conduct the OSOS data entry for the SP - NEG. It will cover data entry for the service provider, as well as data entry for the participant. If you have never used OSOS, please see the guide on Accessing the System for information regarding setting 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.
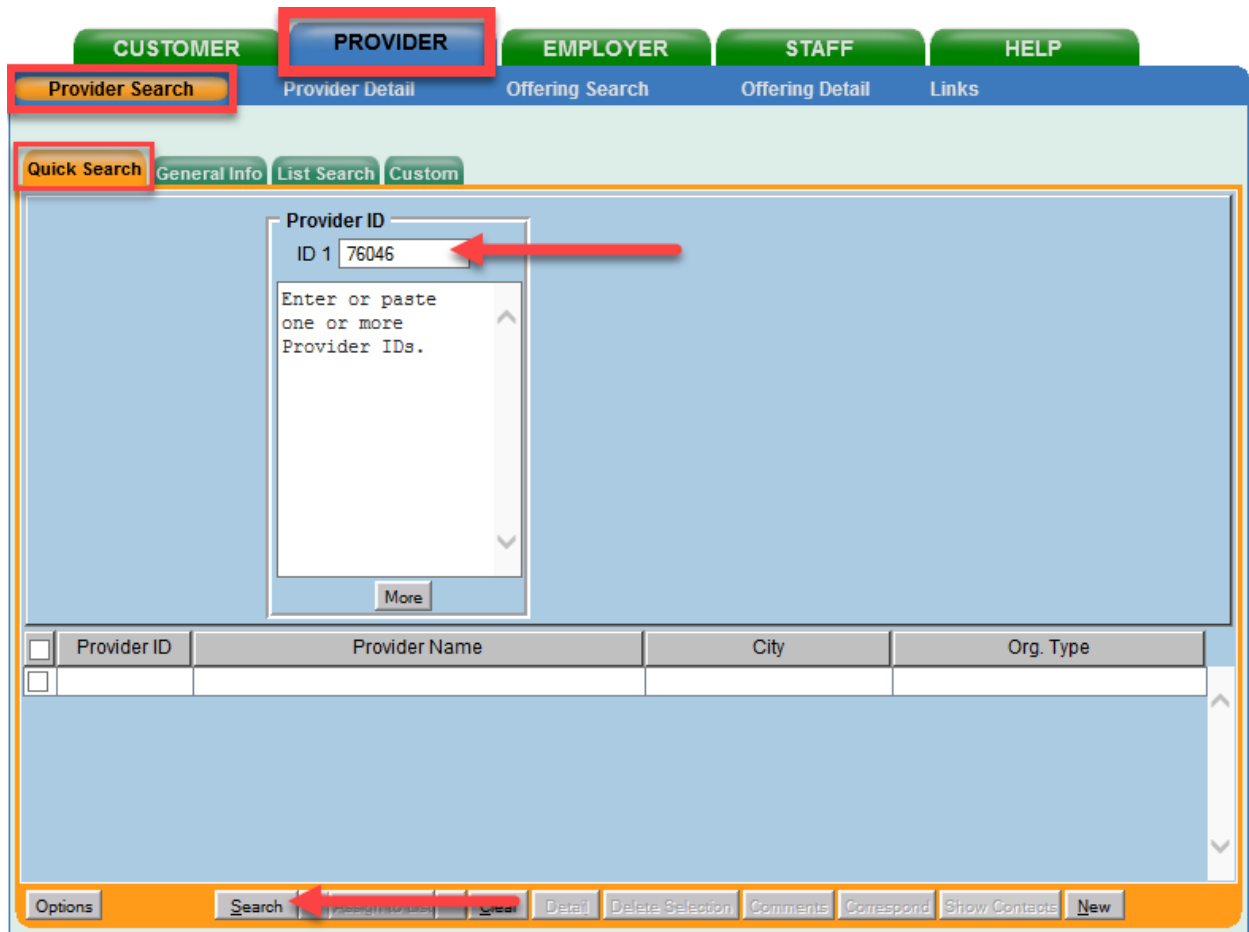
If you do not know the Provider ID number, navigate to "General Info" tab (second tab from the left). Type in the Provider Name and click "Search" at the bottom. If the system returns "No Matches Found" (top right), you will need to create the provider record.

❗ 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.

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

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.

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

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.

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."
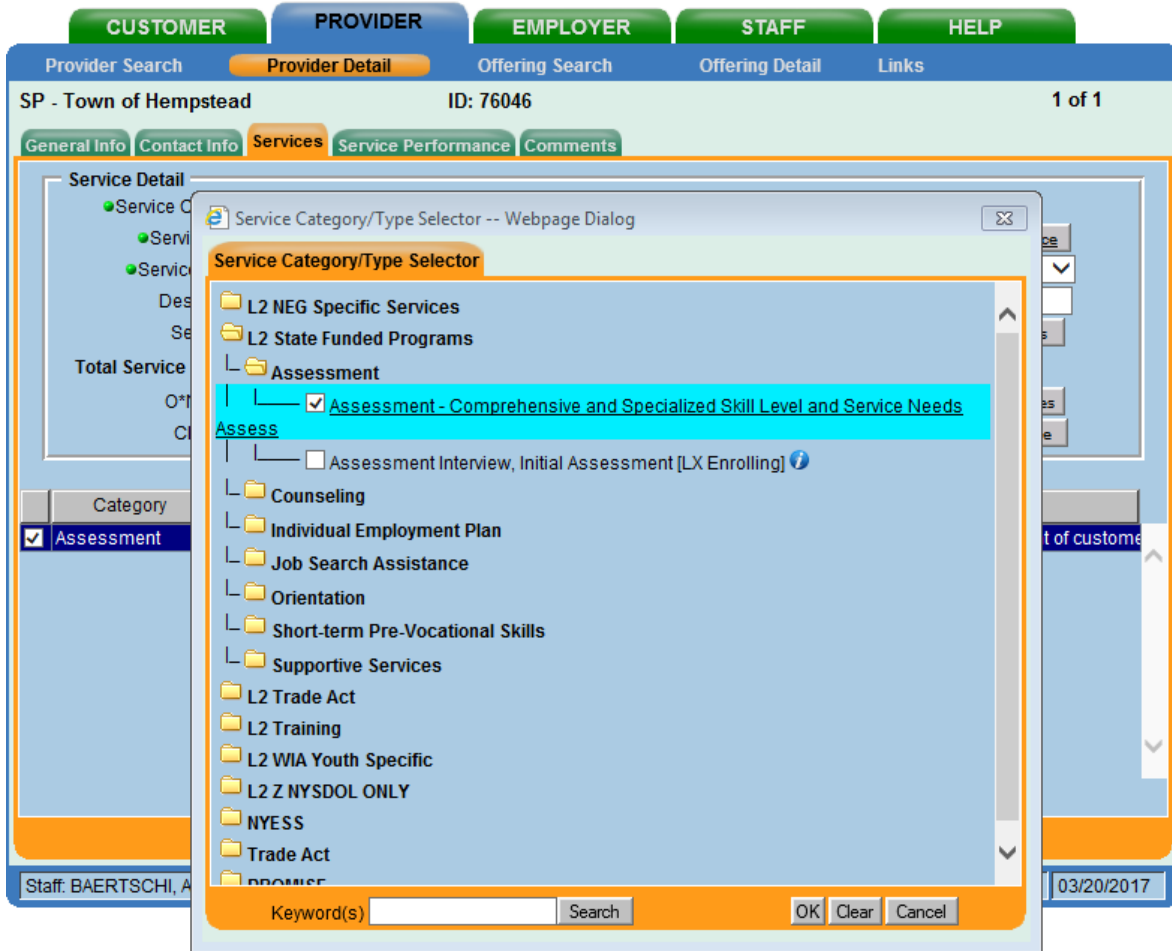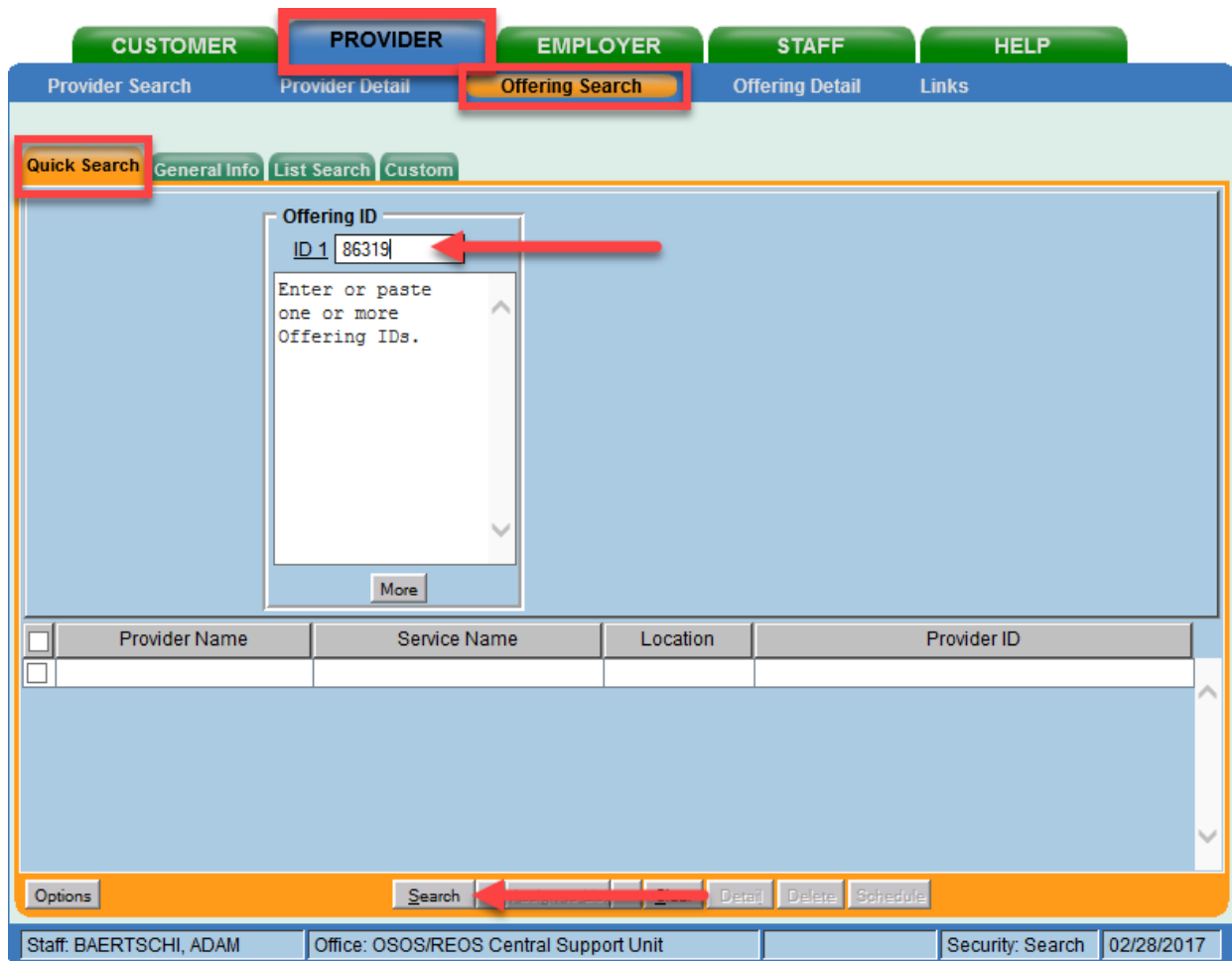

Enter the **Service Name**.

❗ 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.

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.

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

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.

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.

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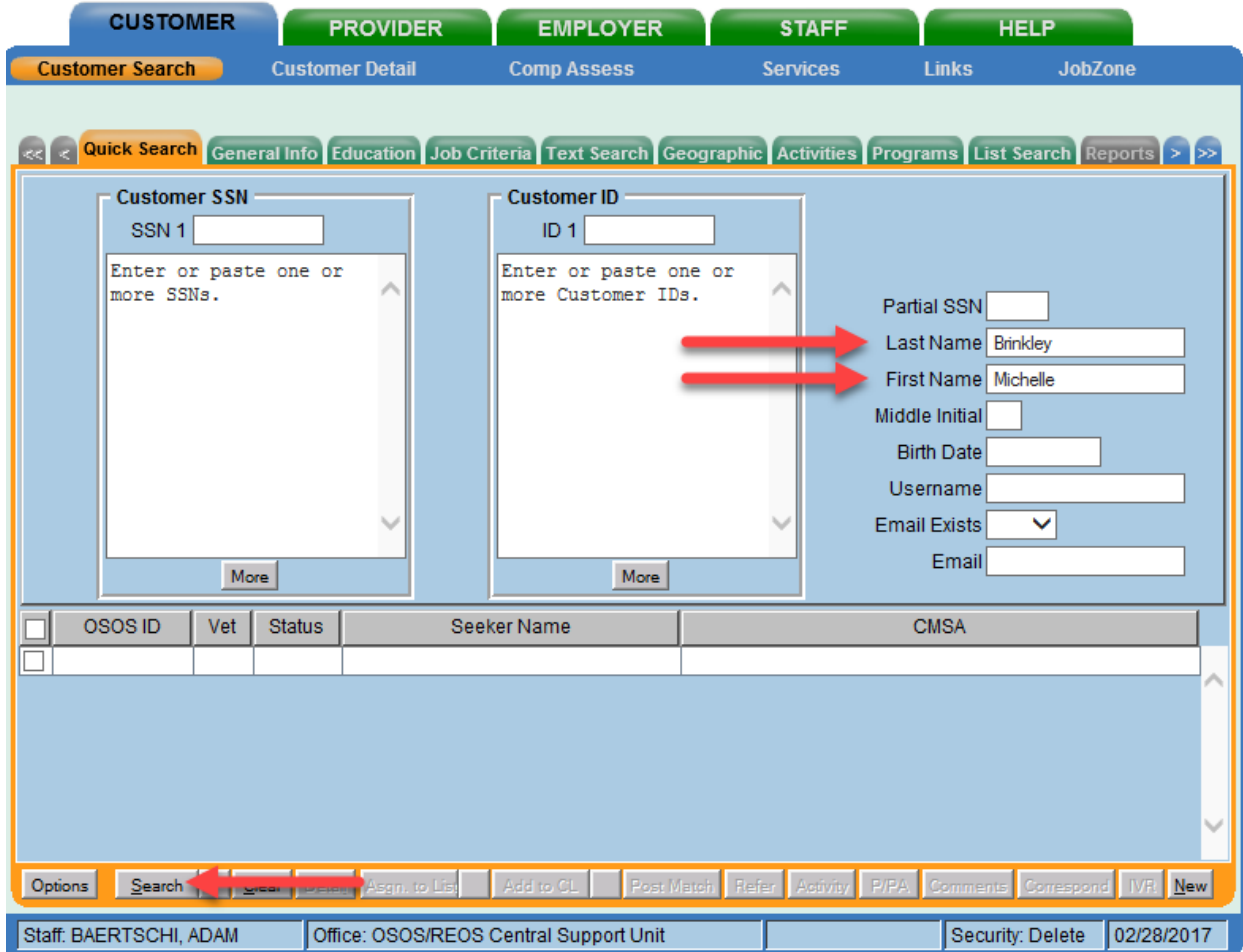
Navigate to the "Services" (1) section and then the "Services" tab (2) of the customer record. Click on the "New Service" (3) button at the bottom.

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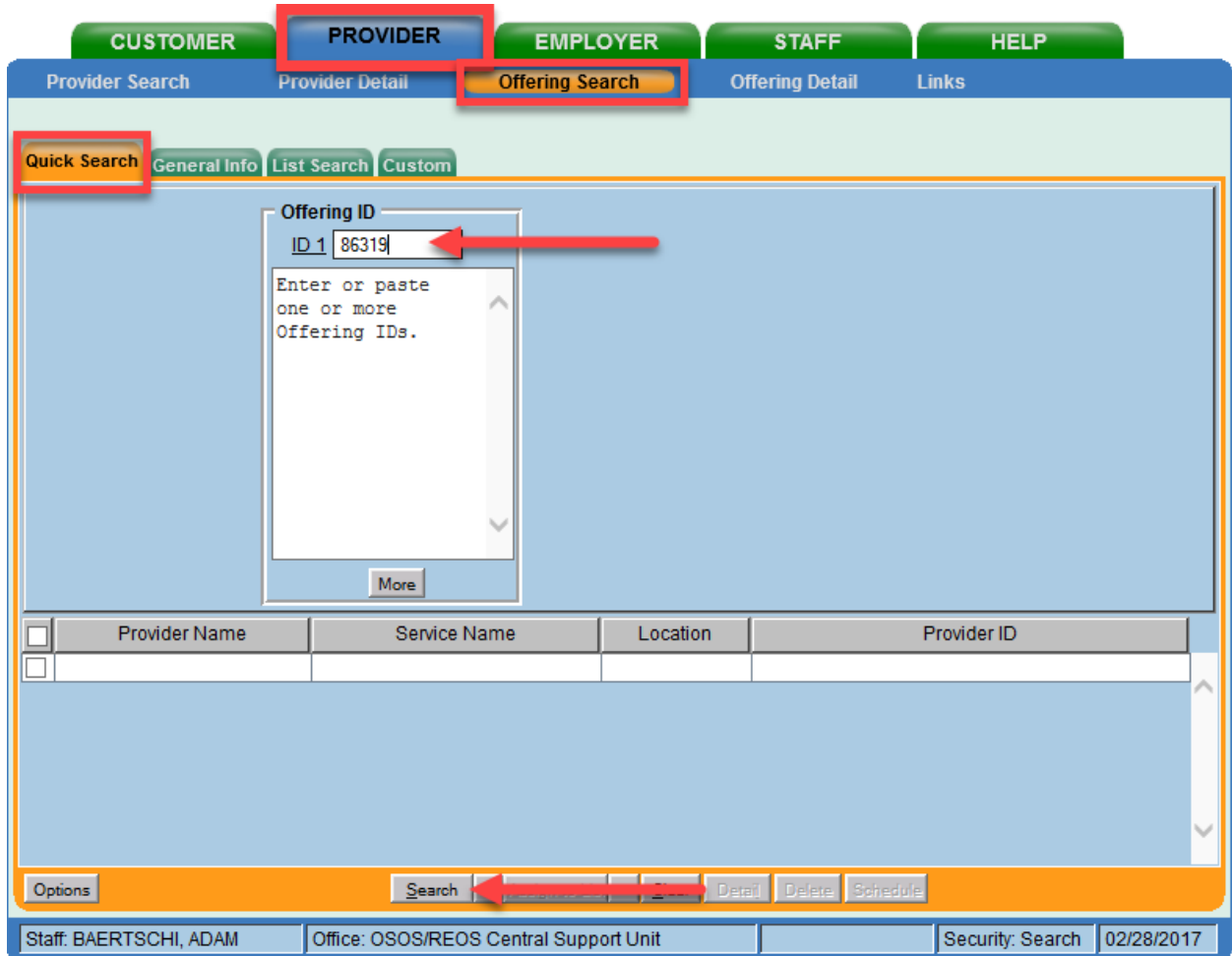
! Note: For OJT, Customized Training, or Career Services, provider information is manually added to OSOS, as discussed above. Classroom training must be listed in the ETPL (Eligible Training Provider List) as specified by the designation ETPL Auto Load. For this reason, the process of adding a service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

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.

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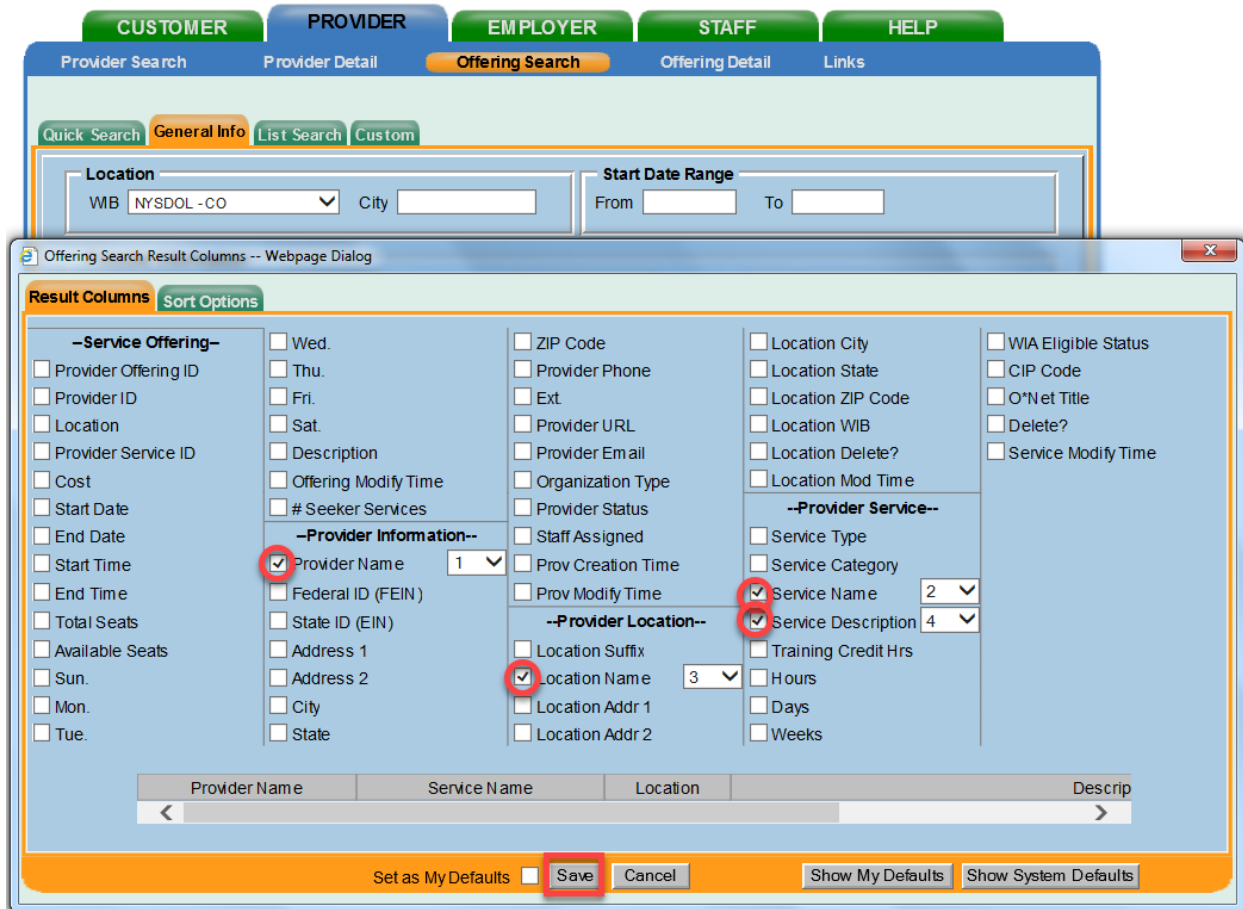
Select the WIB. Enter any known information in the available data fields. OSOS allows you to enter a partial name for the **Provider Name**, **Service Name** fields. You can also select the **Program** or **Service Type** from the corresponding drop down menu. Click "Search."

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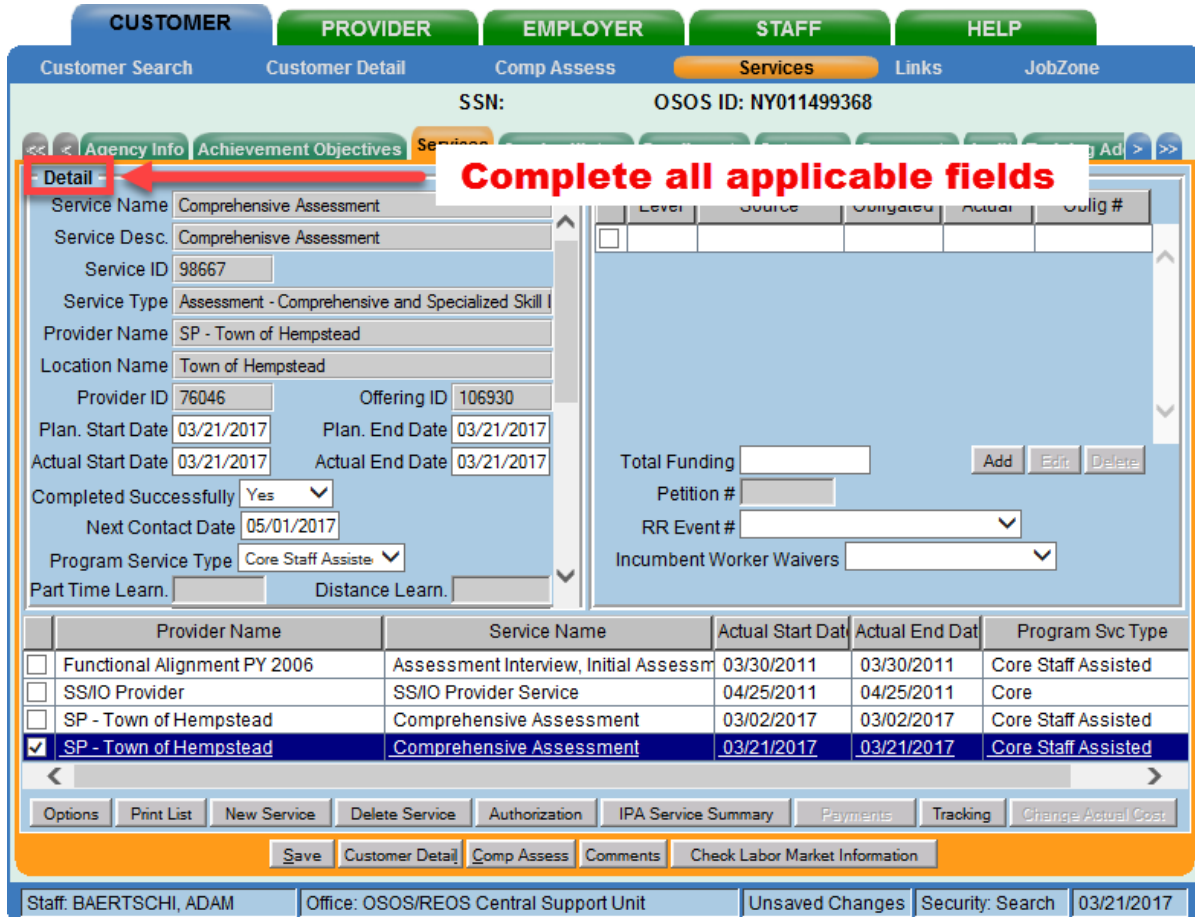
Program Service Type – Select the appropriate program service type corresponding to the type of service.

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.

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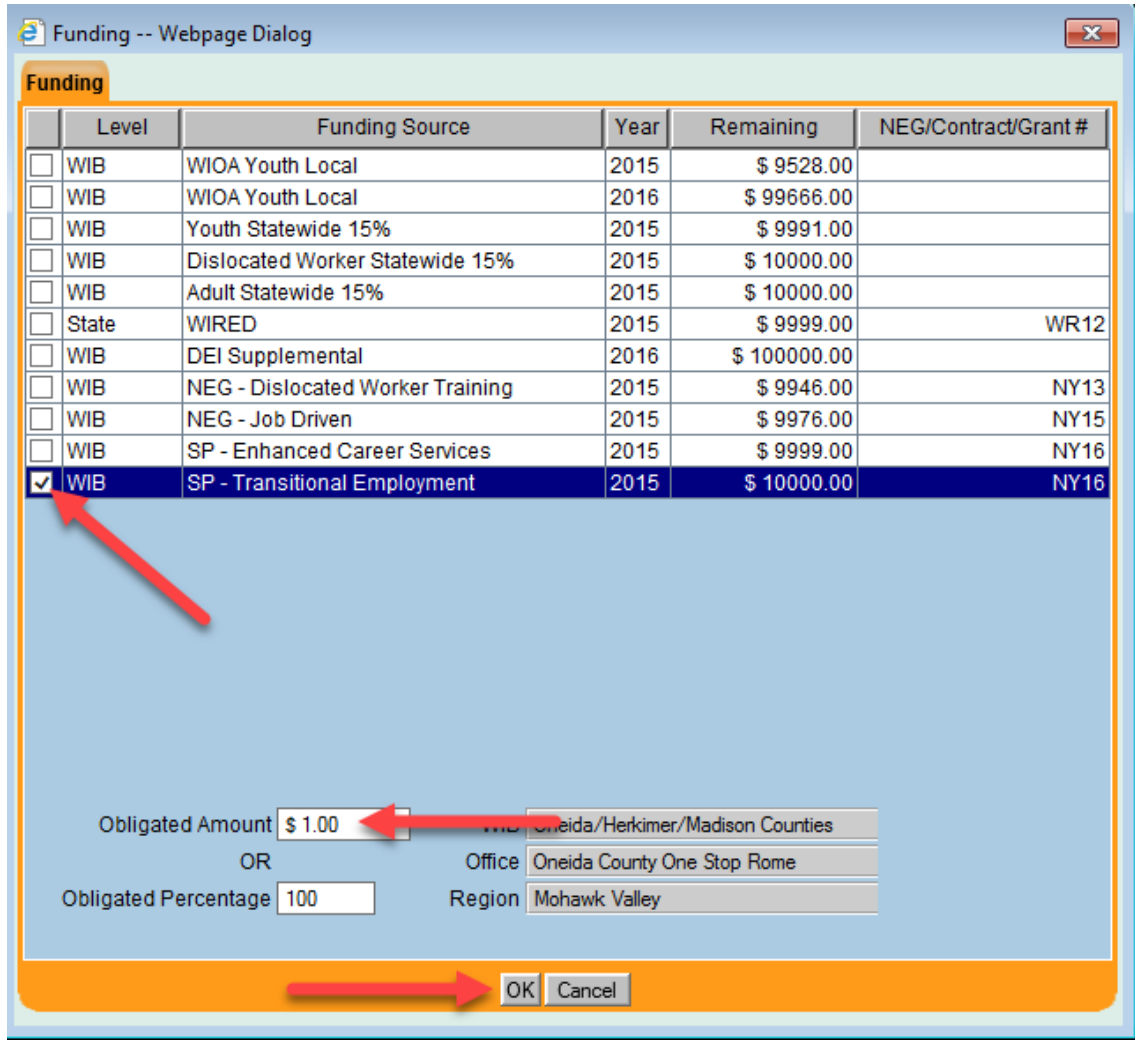
After you click "Add," a pop up widow will appear with a list of funding sources. Check the box next to "SP – Transitional Employment" to select that funding source. Enter "$1.00" in the **Obligated Amount** field and click "OK."

The funding will now appear in the "Funding" section on the right-hand side. Click "Save" at the bottom of the screen.

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.

![OSOS One-Stop Operating System logo]
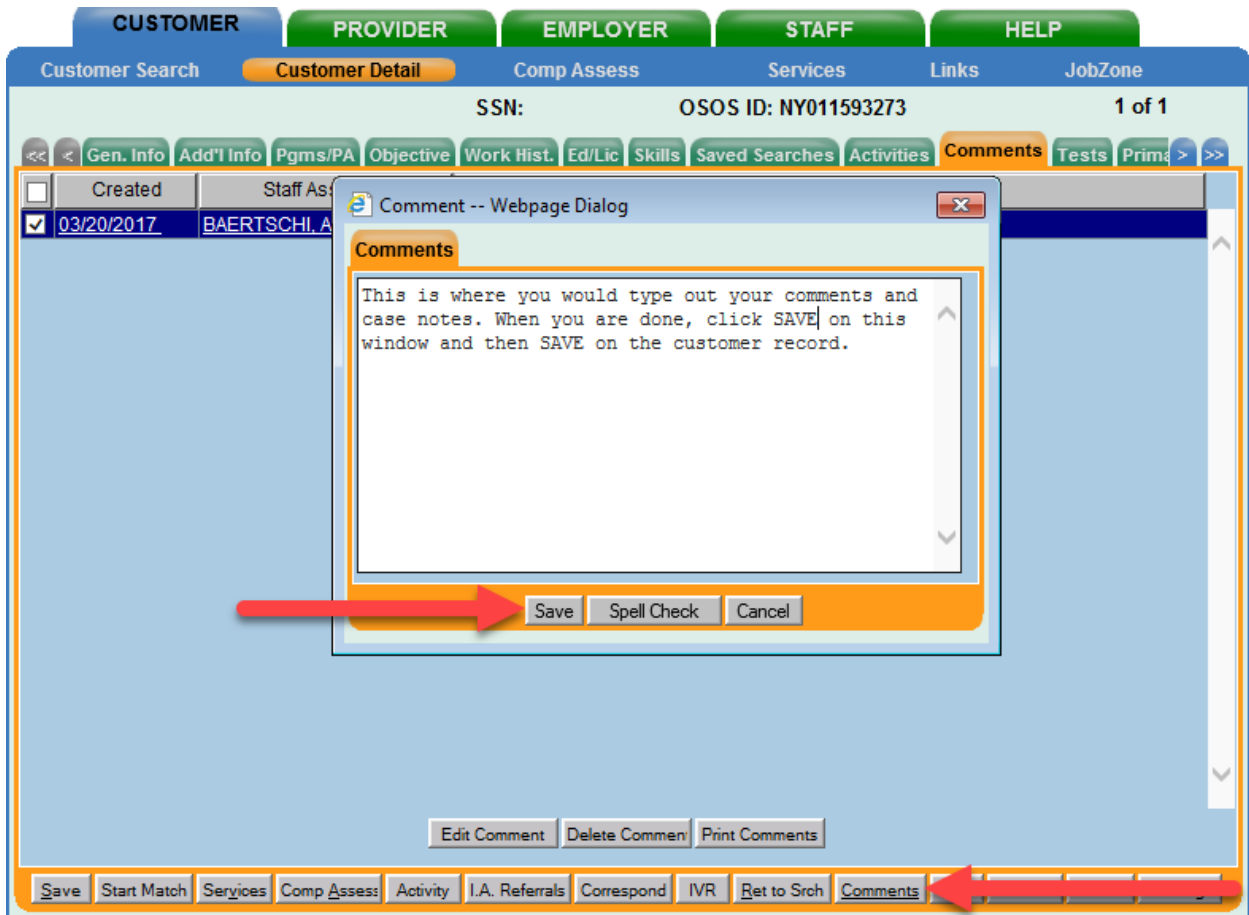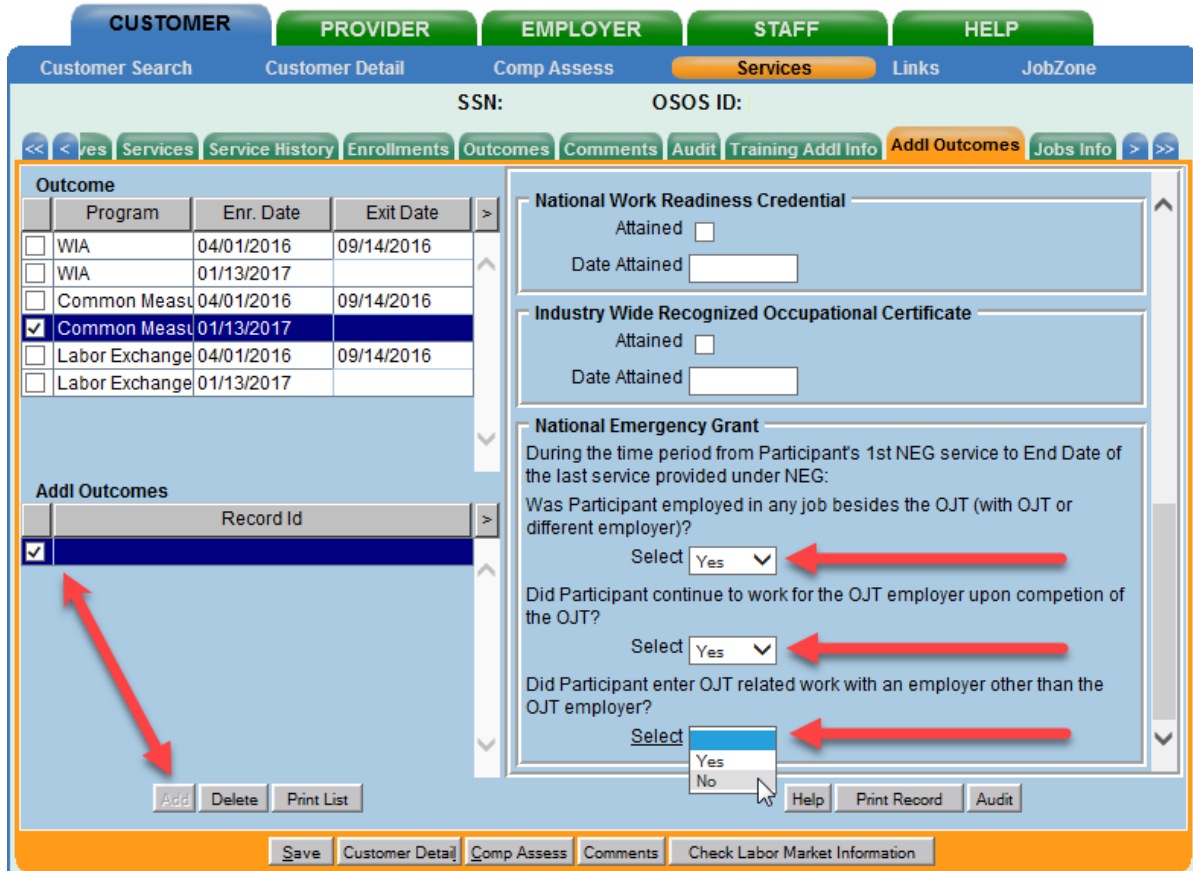
ENTER OUTCOMES

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.
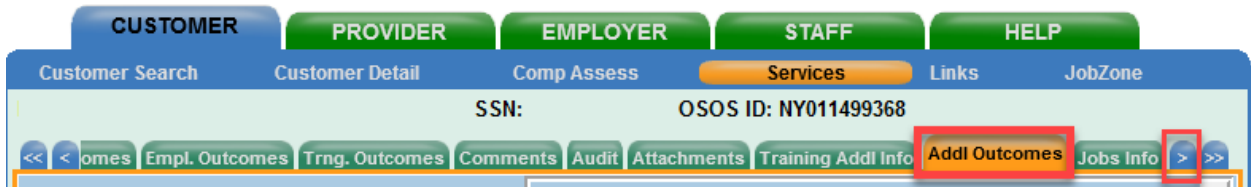
On the "Addl Outcomes" tab, select "Common Measures" enrollment, under the "Program" column, with an enrollment date that corresponds to the date the SP – NEG service was entered (left-hand side). After you select the enrollment, use the scrollbar on the right-hand side to scroll down to the very bottom of the page.
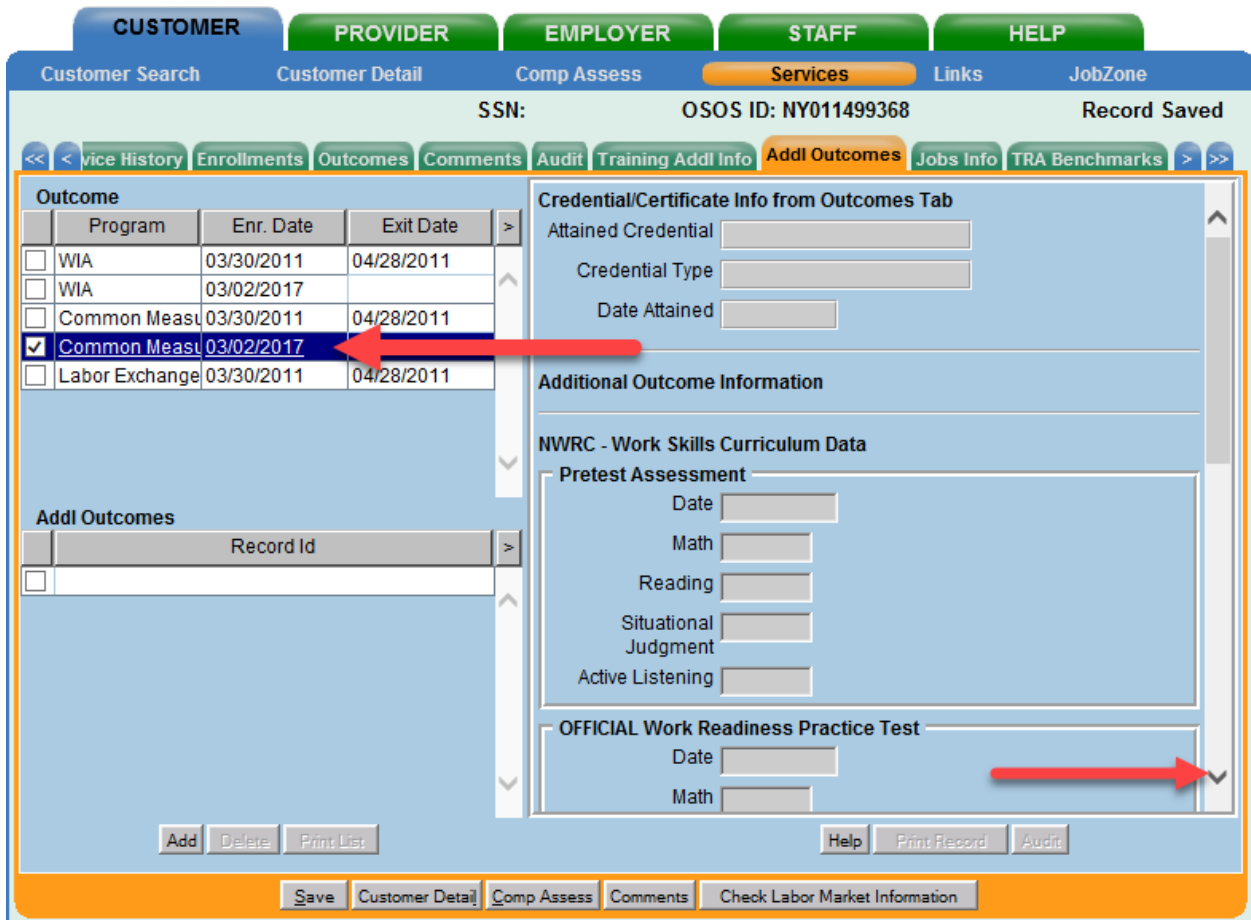
Under the "Record ID" section (bottom left-hand side), click the "Add" button. This will allow you to enter data in the fields on the right. Under the "National Emergency Grant" section, select "Yes" or "No" in the drop down menu for each of the three questions and click "Save." Be sure to answer all three questions.

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