
State-Level Training and Supportive Services OSOS Guide



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PURPOSE

The New York State Department of Labor (NYSDOL) will issue State-level funds to interested and eligible Local Workforce Development Boards (LWDBs) through a Notice of Obligational Authority (NOA) process. The purpose is to fund training and supportive services to eligible WIOA Adult and WIOA Dislocated Workers (DWs). NYSDOL will partner with eligible and interested LWDBs and a funding scale will be available based on the size of the LWDB:

- Small LWDBs (Columbia-Greene, Sullivan, and Tompkins) – Up to \$100,000;
- Medium LWDBs (All others, except small LWDBs and NYC) – Up to \$200,000; and
- Large LWDB (New York City) – Up to \$300,000.

An LWDB is eligible for this funding if it met the required 80% obligation rate for Adult and DW funds in the proceeding Program Year (PY) and is on track to do so for the current PY.

OSOS is a case management system designed to record a process in which services are provided to jobseekers and employers. NYSDOL requires that all Career Center customers receive an initial assessment prior to or on the same day they receive their first staff-assisted service. 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 to measure its success in achieving the desired goals. Additional information on Initial Assessments can be found in Technical Advisory (TA) [#23-06](#).



PARTICIPANT DATA ENTRY

RECORD THE SERVICE

After ensuring that the training provider information is in OSOS, staff may record participant data relevant to the services being provided. If training provider information needs to be added to OSOS, it can be entered using the step-by-step instructions found in the OSOS guide located here:

<https://labor.ny.gov/workforcenypartners/osos/OSOS-Guide-Creating-Providers-Services-and-Offerings.pdf>

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.

The screenshot displays the OSOS Customer Search interface. The top navigation bar includes 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. The 'CUSTOMER' section is active, showing 'Customer Search', 'Customer Detail', 'Comp Assess', 'Services', 'Links', 'JobZone', and 'NextGen'. The 'Quick Search' tab is selected, with sub-tabs for 'General Info', 'Education', 'Job Criteria', 'Text Search', 'Geographic', 'Activities', 'Programs', 'List Search', and 'Reports'. The search area contains two input boxes: 'Customer SSN' (SSN 1) and 'Customer ID' (ID 1), both with 'More' buttons. To the right are fields for 'Partial SSN', 'Last Name' (Pickett), 'First Name' (Poly), 'Middle Initial', 'Birth Date', 'Username', 'Email Exists' (dropdown), and 'Email'. A table below shows columns for OSOS ID, Seeker Name, SSN, Status, and DOB. The bottom toolbar includes buttons for 'Options', 'Search', 'In to LS', 'Add to CL', 'Post Match', 'Refer', 'Activity', 'PIPA', 'Comments', 'Correspond', 'IVR', and 'New'. Red arrows highlight the 'Customer ID' input, the 'Last Name' and 'First Name' fields, and the 'Search' button.

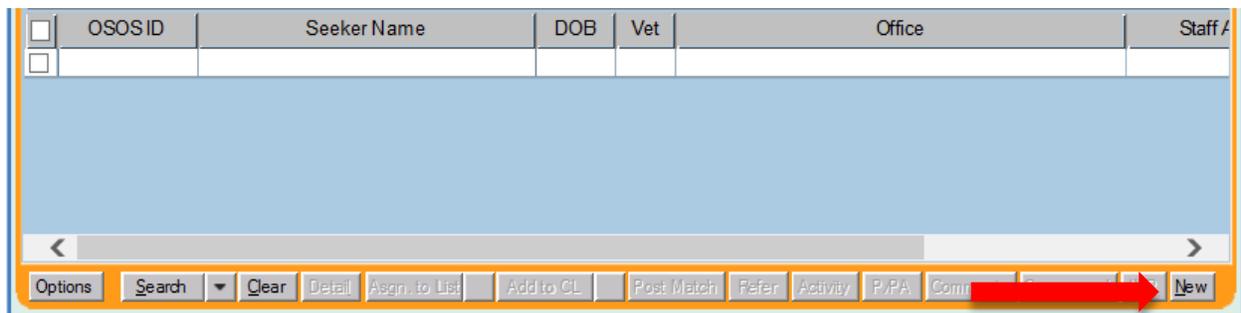


If a customer name search returns multiple records for the same customer, contact the OSOS help desk at help.osos@labor.ny.gov or 518-457-6586 to determine which record to use.

If no matches are found, you will need to create a new record for the customer in OSOS, as customers served under this grant must be registered with NYS's Career Centers. Instructions for creating a basic customer record can be found in detail here:

<https://labor.ny.gov/workforcenypartners/osos/Creating-a-Basic-Customer-Record-OSOS-Guide-12-10-2018.pdf>

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



<input type="checkbox"/>	OSOS ID	Seeker Name	DOB	Vet	Office	Staff #
<input type="checkbox"/>						

Options Search Clear Detail Asgn. to List Add to CL Post Match Refer Activity P/PA Com **New**



Please note that the customer must be documented as a WIOA Adult or DW to receive funded services. To determine WIOA DW status, refer to the following checklist found at <https://dol.ny.gov/system/files/documents/2021/03/dislocated-worker-osos-checklist.pdf> and Program Guidance Letter (PGL) #22-01 to ensure the customer is eligible. The OSOS fields for documenting DW status can be found in the **Customer** module, **Customer Detail** window, **Work History** tab.

To properly document a DW, the Work History tab must be completed. Start and end dates must be provided, and Category 2 and Category 6 DWs must have an O*Net code. In addition, each category of DW will have different required fields depending on the category selected. The customer listed below is a Category 5 DW due to foreign trade, so the TAA/NAFTA-TAA section must be completed in the Work History tab.

The screenshot shows the OSOS Customer Detail window for Polly Pickett. The 'Work Hist.' tab is active, displaying job details for 'Purchasing Agents, Except Wholesale, Retail, and Farm Products' at 'ABC Clearing House' in 'Fulton, NY'. The job started on 04/01/2018 and ended on 01/05/2024. The wage is \$35.00 per hour, and the hours per week are 40. The reason for leaving is 'Category 1-DW'. The 'Dislocated Worker Information' section is also visible, showing a qualifying dislocation date of 01/05/2024 and a tenure of 36 months.

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Purchasing Agents, Except Whol	ABC Clearing House	Fulton	04/01/2018	01/05/2024

For Category 1 DW, Category 2 DW mass layoff or closure, Category 3 DW self-employed, and Category 6 DW spouse of a member of the Armed Forces customers, the Dislocated Worker Information section needs to be completed. Category 4 DW displaced homemaker, does not require additional data entry in the Dislocated Worker Information data fields.



More information on documenting DW status and OSOS data entry assistance can be found in the Resources section at the end of this guide.

For WIOA Adult, and to comply with WIOA and United States Department of Labor Employment and Training Administration (USDOL ETA) requirements for Adult Priority of Service (APoS), NYSDOL requires that at least 50.1 percent of WIOA Title I Adults receiving Individualized Career or Training Services be a part of one of the priority populations listed below.

Adult Priority of Service individuals include:

- Recipients of Public Assistance
- Other Low-Income individuals
- Individuals who are Basic Skills Deficient - including those who are English Language Learners
- Individuals who are Homeless **and** also listed as Low-Income

The screenshot displays the OSOS Customer Detail page for Polly Pickett. The page is divided into several sections: **Income Info**, **Disability Info**, **Migrant Info**, and **Programs**. In the **Income Info** section, the 'Lower Living Standard' dropdown is set to 'Yes', and the 'Income 70% LLSIL' dropdown is set to 'No'. A red arrow points to the 'Lower Living Standard' dropdown. The **Programs** section shows 'P - Homeless Veterans Reintegration Program / IVTP / HFVWF' selected. The page also includes navigation tabs at the top (CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP) and a bottom toolbar with buttons like Save, Start Match, Services, etc.



Where appropriate, select Yes only for Lower Living Standard OR Income 70% LLSIL. Do not select Yes for both.



Lower Living Standard / Income 70% LLSIL: Select Yes, No or Not Disclosed. The Income Eligibility Guidelines can be found on the DOL Programs & Tools [webpage](#).

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

Pickett, Polly SSN: OSOS ID: NY012312655

<< Employment **Education** Financial Family Health Treatments Legal Housing Transportation Comments Attachments >>

Math & Reading

- Basic Skills Deficient / Low Levels of Literacy Yes - Basic Skills Deficient
- English Language Learner Yes

Education Completed

Education: GED
Current School Status: Not Attending School; Secondary Schoc

Customer below appropriate grade level?
Pell Grant Recipient?
Award Amount:
Any indication of learning disabilities?
Learning Disabilities:

Training Information

- Training Completed
- Training in Progress
- Job-Related Interests
- Job-Related Aptitudes
- Training Needs

Save Customer Detail Services Activity Correspond WOA Eligibility Summary Comments



The screenshot shows the OSOS interface for a customer named Polly Pickett. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, there are links for Customer Search, Customer Detail, Comp Assess (highlighted), Services, Links, JobZone, and NextGen. The customer's SSN and OSOS ID (NY012312655) are displayed. A secondary navigation bar includes tabs for Employment, Education, Financial, Family, Health, Treatments, Legal, Housing (highlighted), Transportation, Comments, and Attachments. The main content area is titled 'Housing Information' and contains the following fields:

- Current Housing: Homeless (indicated by a red arrow)
- Current Housing (2): [Dropdown]
- Housing Assistance: None
- Contact Person: [Text Field]
- Phone: [Text Field] Ext. [Text Field]

Additional information on Adult Priority of Service can be found in TA [#23-01](#).



Before taking any services to enroll a customer, be sure all information is updated on the Customer Detail and Comp Assess windows first! If you find that barriers were not recorded before enrollment, update OSOS to reflect the correct information and then contact the OSOS help desk at help.osos@labor.ny.gov. OSOS Help will then update the enrollment snapshot.

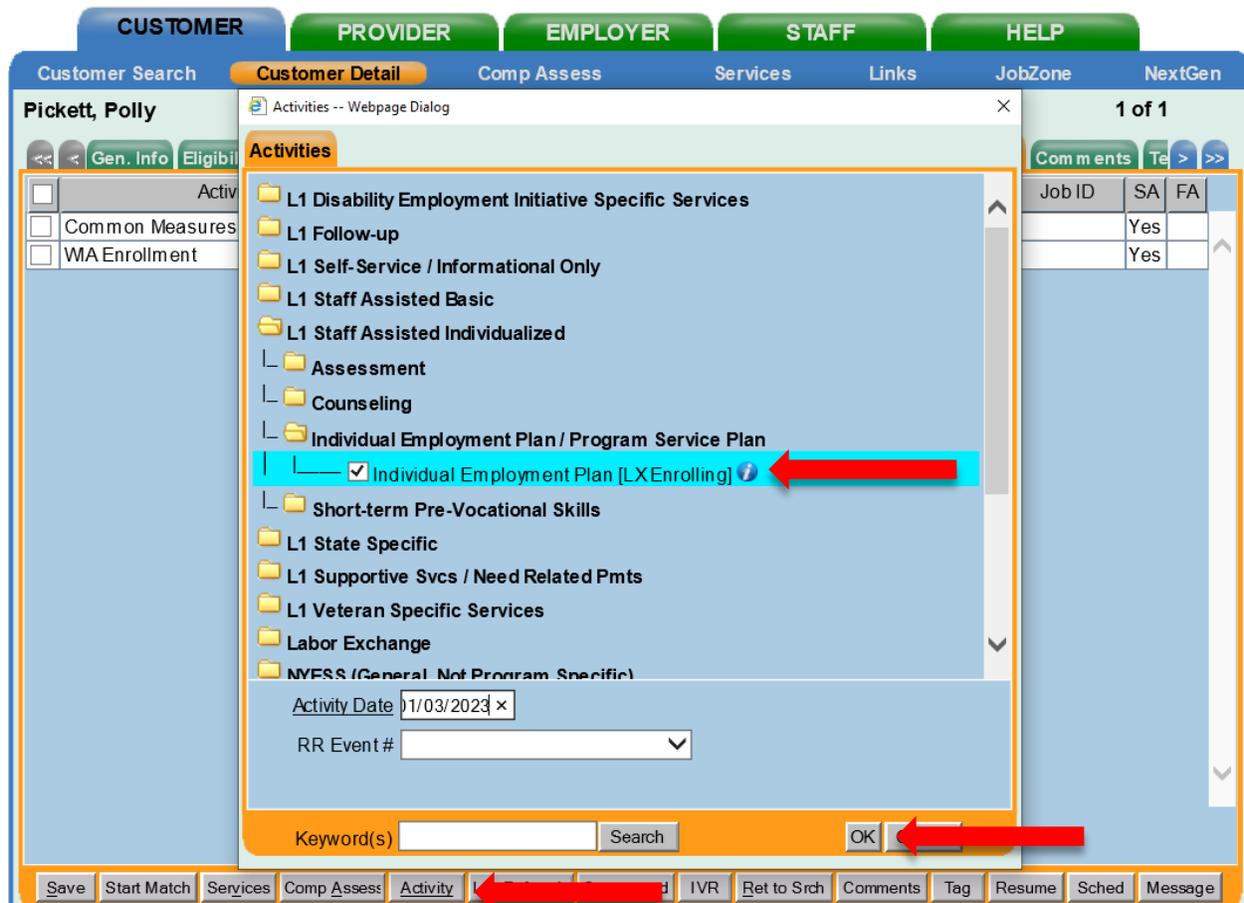
Data Element Validation (TA [#23-03](#)) guidance applies to State Level Funding participants as it does to other WIOA participants.

ENTERING AN INDIVIDUAL EMPLOYMENT PLAN

During an Initial Assessment, determining appropriate next steps should include a plan to upgrade skills or continue to job search. If a skills upgrade is necessary to gain marketable skills, an IEP must be taken as a first step to justify necessary Training and/or Supportive Service Needs. Along with Initial Assessment Services, an IEP is necessary to record for anyone going into training and who will be utilizing WIOA or State-level funding.

Prior to enrolling a customer in training, an IEP must be developed.

To enter an **Individual Employment Plan** activity, click **Activity**. Enter a partial keyword search or utilize folders to select **Individual Employment Plan (LX Enrolling)**. Click **OK**.



The screenshot displays the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail (selected), Comp Assess, Services, Links, JobZone, and NextGen. The main content area shows the profile for 'Pickett, Polly' with tabs for Gen. Info, Eligibility, and Activities. The 'Activities' dialog box is open, showing a list of activity categories. The 'Individual Employment Plan / Program Service Plan' folder is expanded, and the 'Individual Employment Plan [LX Enrolling]' option is selected and highlighted with a red arrow. Below the list, there are input fields for 'Activity Date' (01/03/2023) and 'RR Event #' (a dropdown menu). At the bottom of the dialog, there is a 'Keyword(s)' search field and an 'OK' button, both highlighted with red arrows. The bottom navigation bar includes buttons for Save, Start Match, Services, Comp Assess, Activity (highlighted with a red arrow), IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.



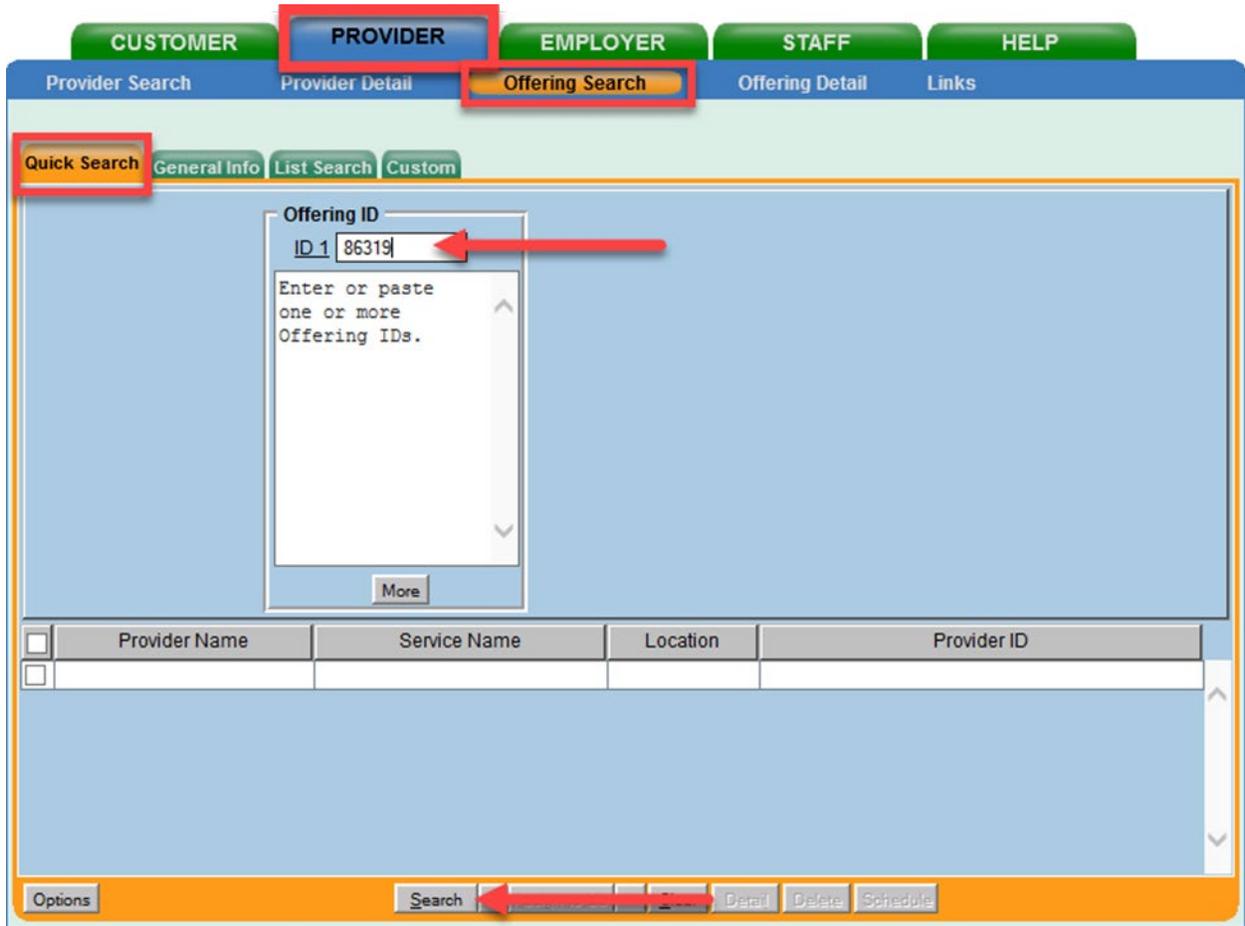
Navigate to the **Services** window and then the **Services** tab of the customer record.

Click the **New Service** button at the bottom.

The screenshot shows the OSOS interface for a customer record. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The main navigation bar includes Customer Search, Customer Detail, Comp Assess, Services (highlighted with a red arrow), and NextGen. The customer name is Pickett, Polly, with SSN: and OSOS ID: NY012312655. The record is marked as 'Record Saved'. The 'Services' tab is selected, and the 'New Service' button is highlighted with a red arrow. The interface is divided into two main sections: 'Detail' and 'Funding'. The 'Detail' section contains various input fields for service information, including Service Name, Service Desc, Service ID, Service Type, Provider Name, Location Name, Provider ID, Offering ID, Plan. Start Date, Plan. End Date, Actual Start Date, Actual End Date, Completed Successfully, Next Contact Date, Program Service Type, Part Time Learn., and Distance Learn. The 'Funding' section contains a table with columns for Level, Source, Obligated, Actual, and Oblig #, and fields for Total Funding, Petition #, RR Event #, and Incumbent Worker Training. The bottom of the interface features a toolbar with buttons for Options, Print List, New Service (highlighted with a red arrow), Authorization, IPA Service Summary, Payments, and Tracking. A secondary toolbar at the very bottom includes Save, Customer Detail, Comp Assess, and Comments.

After you click the **New Service** button, OSOS will automatically navigate to the **Provider** module. Within the **Provider** module, OSOS will automatically navigate 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:

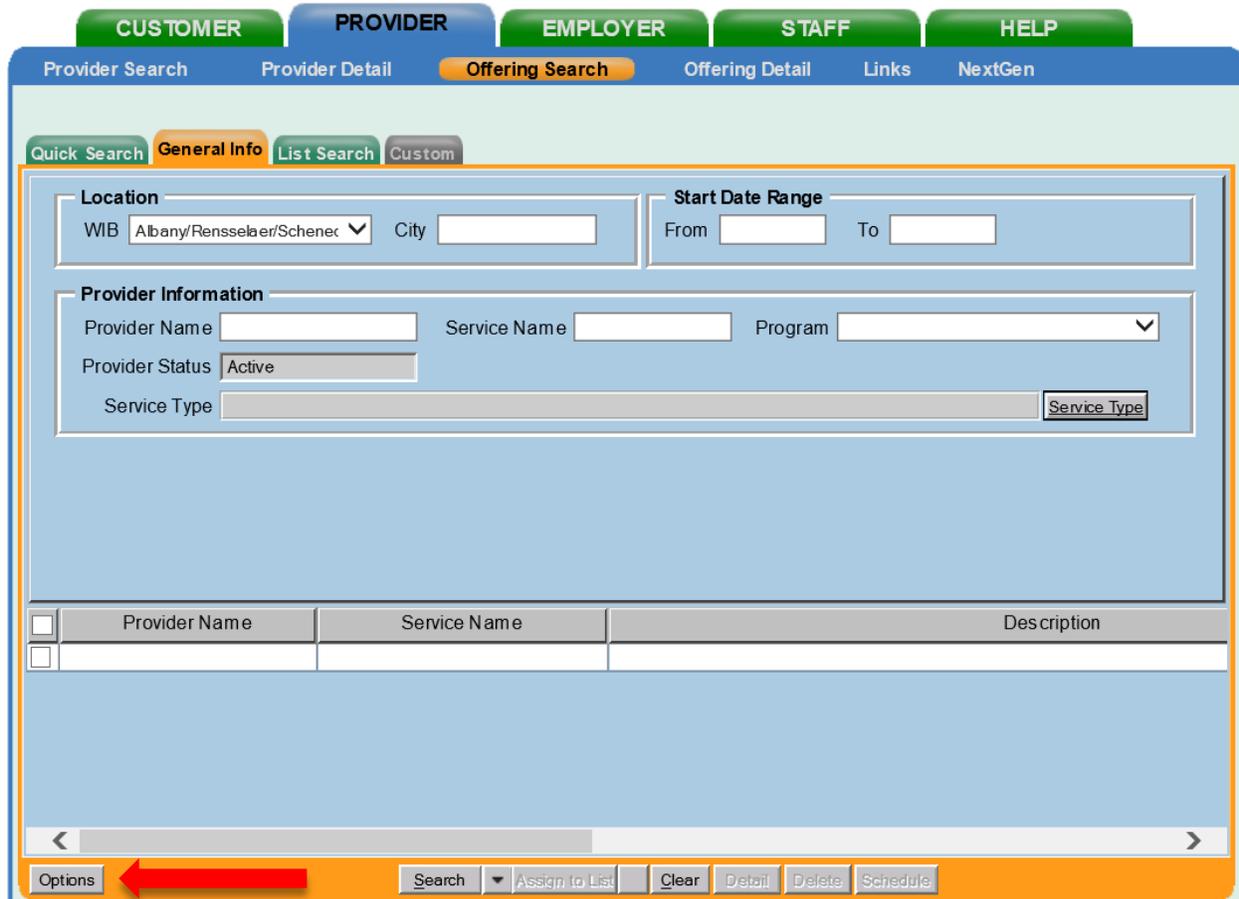
- Top navigation: CUSTOMER, **PROVIDER**, EMPLOYER, STAFF, HELP
- Sub-navigation: Provider Search, Provider Detail, **Offering Search**, Offering Detail, Links
- Search tabs: **Quick Search**, General Info, List Search, Custom
- Search box: Offering ID, ID 1 86319 (with a red arrow pointing to the input)
- Search instructions: Enter or paste one or more Offering IDs.
- More button: More
- Table headers: Provider Name, Service Name, Location, Provider ID
- Table content: One empty row with checkboxes on the left.
- Bottom bar: Options, **Search** (with a red arrow pointing to the button), Cancel, Delete, Schedule

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

For Occupational Skills Training to be funded, the training provider/service must have been auto loaded into OSOS from the Eligible Training Provider List (ETPL).

To help you determine whether a provider has been auto loaded from the ETPL, the search options need to be adjusted before conducting the search.

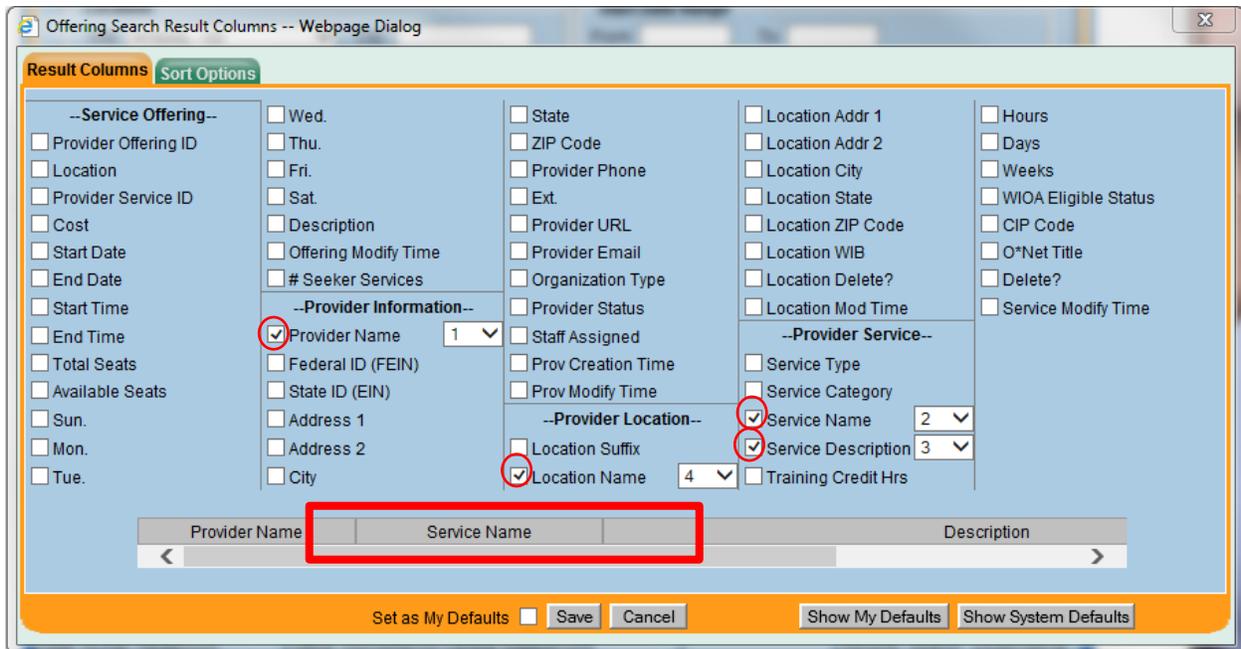
To do this, click on **Options** at the bottom of the screen.



The screenshot shows the OSOS web application interface for the 'Offering Search' section. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (selected), Offering Detail, Links, and NextGen. The main search area has sub-tabs: Quick Search, General Info (selected), List Search, and Custom. The search form includes fields for Location (WB Albany/Rensselaer/Schenec, City), Start Date Range (From, To), Provider Information (Provider Name, Service Name, Program, Provider Status: Active, Service Type), and a table with columns for Provider Name, Service Name, and Description. At the bottom, there is an 'Options' button with a red arrow pointing to it, and other buttons: Search, Assign to List, Clear, Detail, Delete, and Schedule.

A pop-up window will appear containing a list of categories you can choose to display for your search results. Select the following four categories: Provider Name, Service Name, Location Name, and Service Description. The Service Description is especially important because this field will indicate if the service was autoloaded from the ETPL.

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



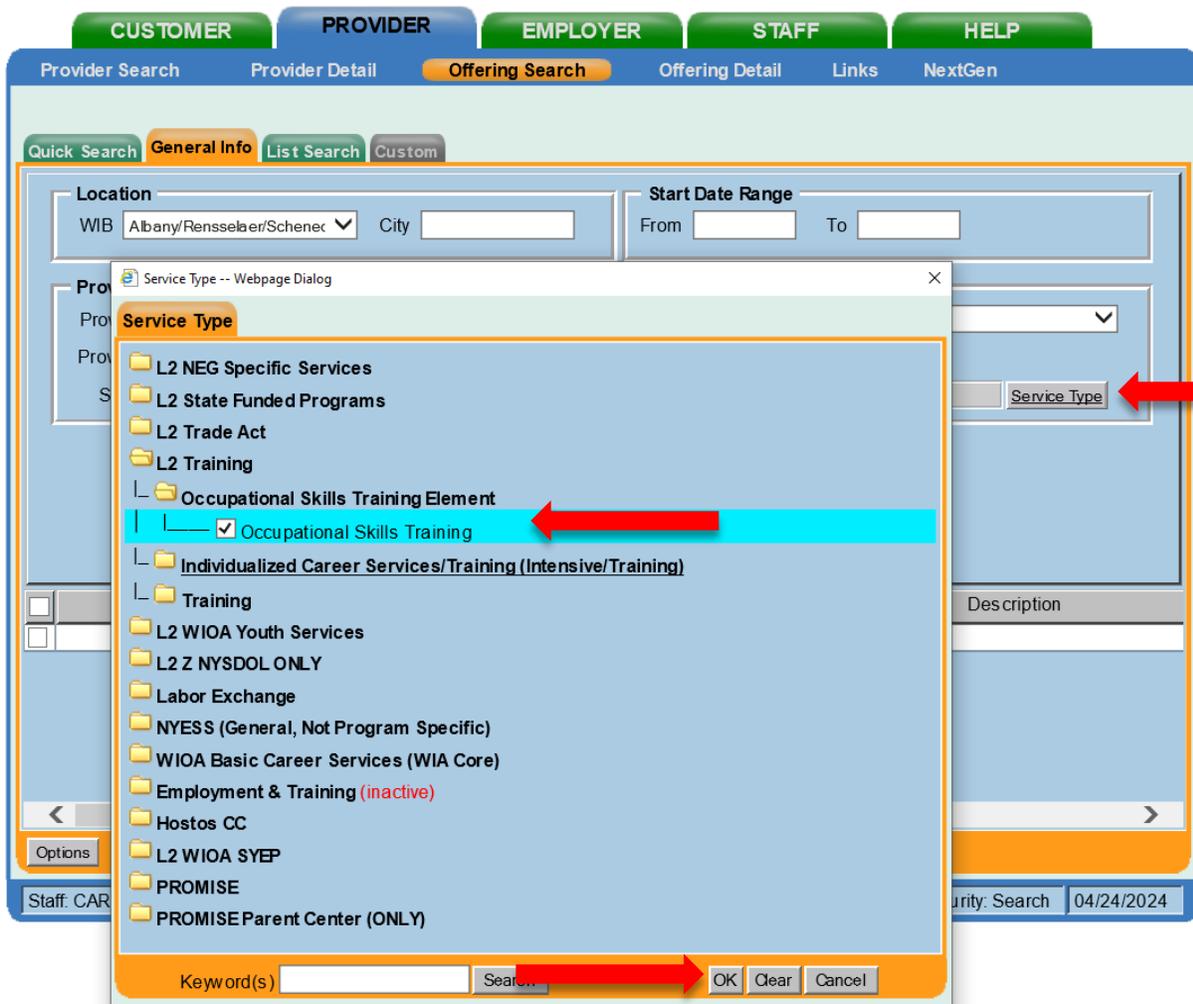

*You can check the box to “**Save My Defaults**” before you save so that you do not have to set these options each time you conduct a search.*

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

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

Then, click **Service Type**.

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



A list of Providers will display and will need to include ETP Auto load listed in the description. Select the appropriate Provider and Service and click **Schedule**.

CUSTOMER **PROVIDER** EMPLOYER STAFF HELP

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

1 - 6 of 6

Quick Search **General Info** List Search Custom

Location
 WIB Albany/Rensselaer/Schenec City

Start Date Range
 From To

Provider Information
 Provider Name Service Name Program

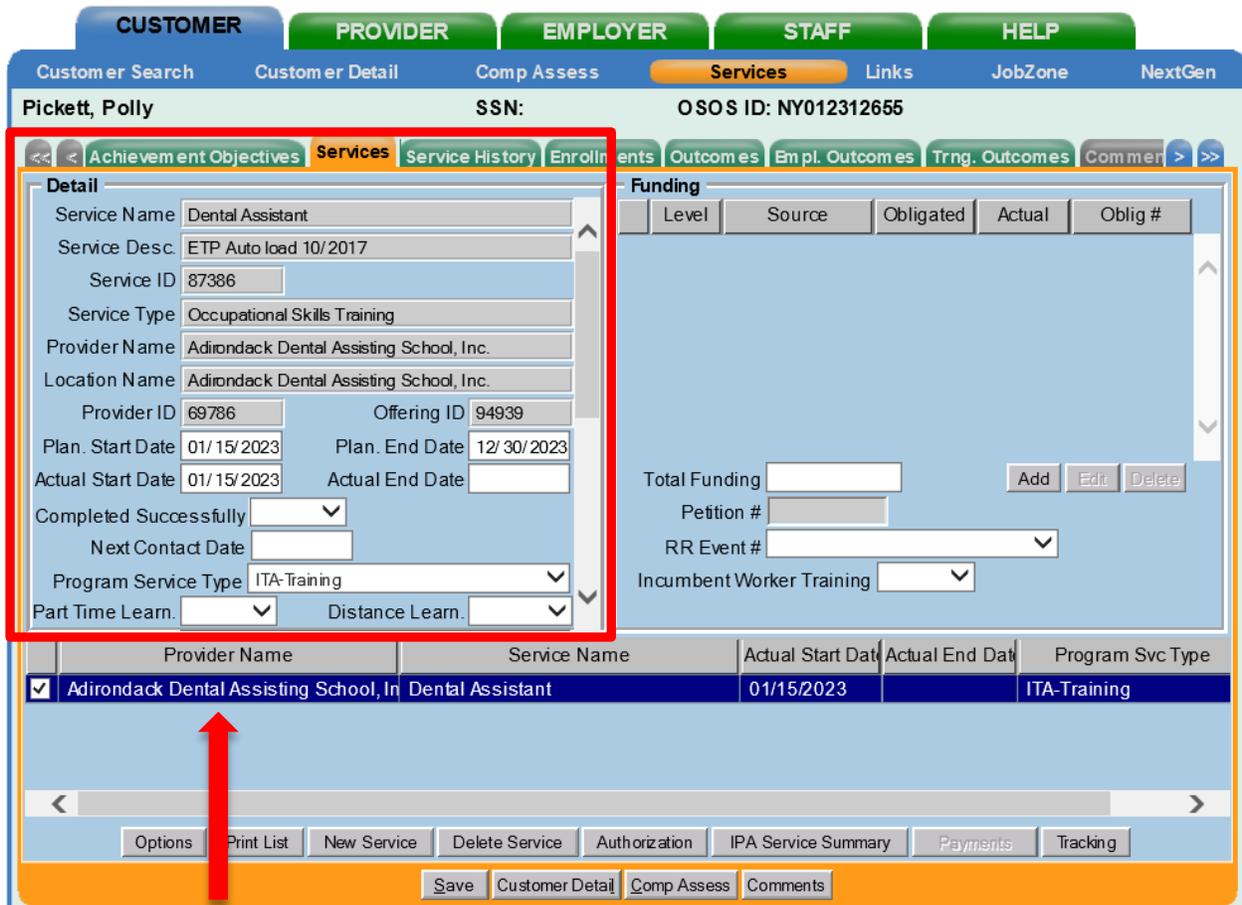
Provider Status

Service Type Service Type

<input type="checkbox"/>	Provider Name	Service Name	Description
<input type="checkbox"/>	ADIRONDACK ADVANTAGE	Adirondack Advantage Driving Sc	100 Hour CDL Class A Training Program
<input type="checkbox"/>	ADIRONDACK ADVANTAGE	Heavy Equipment Operations	Training including 1 week of classroom instruction, coupled with 5 week
<input type="checkbox"/>	Adirondack Community Colle	Hospitality & Tourism	AAS Hospitality & Tourism
<input type="checkbox"/>	Adirondack Community Colle	Liberal Arts/Science	Coursework aimed at completing Associates degree in concentrated sc
<input type="checkbox"/>	Adirondack Community Colle	Nursing AAS	Nursing Associates Degree program.
<input checked="" type="checkbox"/>	Adirondack Dental Assisting	Dental Assistant	ETP Auto load 10/2017

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

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



The screenshot shows the OSOS interface with the 'Services' tab selected. The customer is 'Pickett, Polly' with SSN: [redacted] and OSOS ID: NY012312655. The 'Detail' window on the left contains the following information:

- Service Name: Dental Assistant
- Service Desc: ETP Auto load 10/2017
- Service ID: 87386
- Service Type: Occupational Skills Training
- Provider Name: Adirondack Dental Assisting School, Inc.
- Location Name: Adirondack Dental Assisting School, Inc.
- Provider ID: 69786, Offering ID: 94939
- Plan. Start Date: 01/15/2023, Plan. End Date: 12/30/2023
- Actual Start Date: 01/15/2023, Actual End Date: [redacted]
- Completed Successfully: [dropdown]
- Next Contact Date: [redacted]
- Program Service Type: ITA-Training
- Part Time Learn.: [dropdown], Distance Learn.: [dropdown]

The table below the 'Detail' window shows a list of services with the following columns: Provider Name, Service Name, Actual Start Date, Actual End Date, and Program Svc Type. The first row is selected:

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
Adirondack Dental Assisting School, In	Dental Assistant	01/15/2023		ITA-Training

At the bottom of the screen, there are buttons for 'Options', 'Print List', 'New Service', 'Delete Service', 'Authorization', 'IPA Service Summary', 'Payments', 'Tracking', 'Save', 'Customer Detail', 'Comp Assess', and 'Comments'.



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

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

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

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

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

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

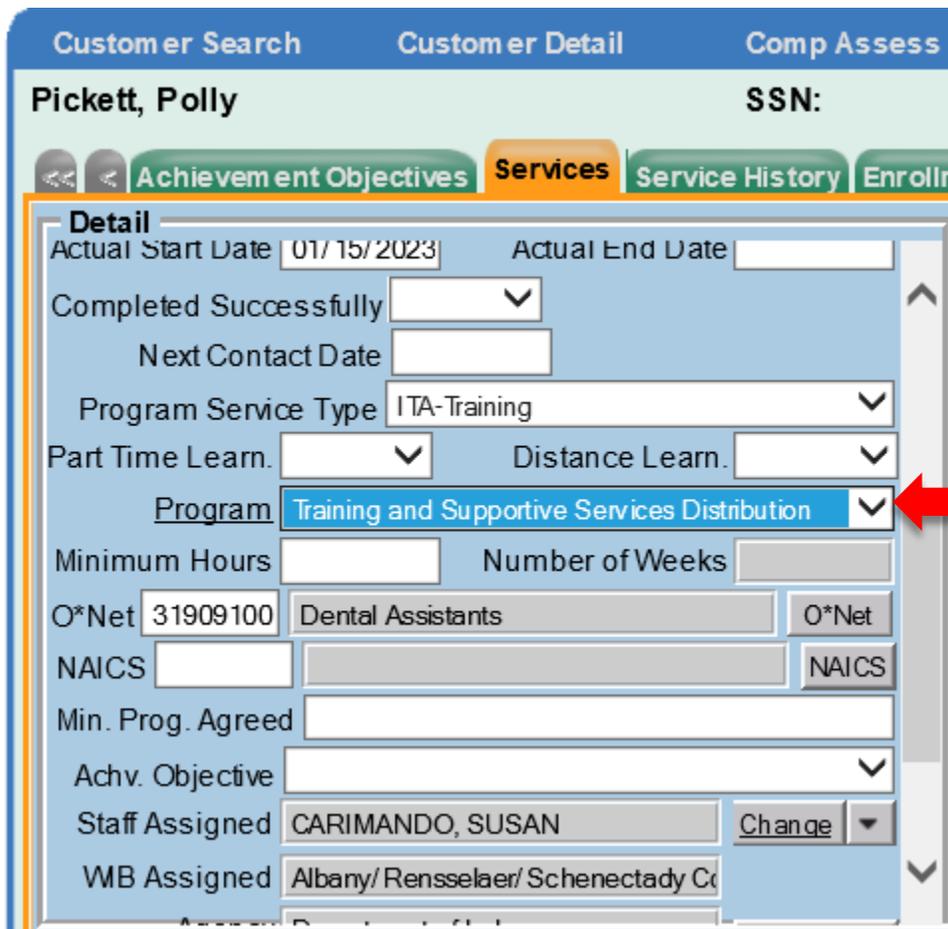
O*NET – The O*Net code must be entered for a training service. If you do not know the O*NET code, refer to [O*NET Titles in OSOS Guide](#).

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.

The **O*Net code** automatically populates.

Under **Program**, select **Training and Supportive Services Distribution** from the list.



The screenshot shows the OSOS interface for a customer named Polly Pickett. The 'Services' tab is active, displaying a 'Detail' form. A red arrow points to the 'Program' dropdown menu, which is currently set to 'Training and Supportive Services Distribution'. Other fields include 'Actual Start Date' (01/15/2023), 'Actual End Date', 'Completed Successfully' (dropdown), 'Next Contact Date', 'Program Service Type' (ITA-Training), 'Part Time Learn.' and 'Distance Learn.' (dropdowns), 'Minimum Hours', 'Number of Weeks', 'O*Net' (31909100), 'Dental Assistants', 'NAICS', 'Min. Prog. Agreed', 'Achv. Objective' (dropdown), 'Staff Assigned' (CARIMANDO, SUSAN), and 'WB Assigned' (Albany/ Rensselaer/ Schenectady Co).



Once all the information is updated on Detail (left-hand side), click **Save**. If funding is entered before saving, OSOS will generate an error message.

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

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

Pickett, Polly SSN: OSOS ID: NY012312655 Record Saved

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

Detail		Funding				
Service ID	87386	Level	Source	Obligated	Actual	Oblig #
Service Type	Occupational Skills Training					
Provider Name	Adirondack Dental Assisting School, Inc.					
Location Name	Adirondack Dental Assisting School, Inc.					
Provider ID	69786	Offering ID	94939			
Plan. Start Date	01/15/2023	Plan. End Date	12/30/2023			
Actual Start Date	01/15/2023	Actual End Date				
Completed Successfully	<input type="checkbox"/>					
Next Contact Date						
Program Service Type	ITA-Training					
Part Time Learn.	<input type="checkbox"/>	Distance Learn.	<input type="checkbox"/>			
Program	Training and Supportive Services Distribution					
Minimum Hours		Number of Weeks				
		Total Funding	<input type="text"/>	Add	Edit	Delete
		Petition #	<input type="text"/>			
		RR Event #	<input type="text"/>			
		Incumbent Worker Training	<input type="checkbox"/>			

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/> Adirondack Dental Assisting School, In	Dental Assistant	01/15/2023		ITA-Training

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

Save Customer Detail Comp Assess Comments



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

Check the box next to **Adult Statewide 15%** or if a DW, choose **Dislocated Worker Statewide 15%**, as the 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"/>	WB	MOA Adult Local	2021	\$ 99989.00	
<input type="checkbox"/>	WB	MOA Adult Local	2022	\$ 99987.00	
<input type="checkbox"/>	WB	MOA Adult Local	2023	\$ 99992.00	
<input type="checkbox"/>	WB	MOA Dislocated Worker Local	2021	\$ 99999.00	
<input type="checkbox"/>	WB	MOA Dislocated Worker Local	2022	\$ 99995.00	
<input type="checkbox"/>	WB	MOA Dislocated Worker Local	2023	\$ 99998.00	
<input type="checkbox"/>	WB	MOA Youth Local	2021	\$ 99999.00	
<input type="checkbox"/>	WB	MOA Youth Local	2022	\$ 99998.00	
<input type="checkbox"/>	WB	MOA Youth Local	2023	\$ 100000.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2021	\$ 99999.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2022	\$ 99999.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2021	\$ 100000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2022	\$ 100000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WB	Adult Statewide 15%	2021	\$ 100000.00	
<input type="checkbox"/>	WB	Adult Statewide 15%	2022	\$ 100000.00	
<input checked="" type="checkbox"/>	WB	Adult Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	State	DHP State Funded	2023	\$ 99991.00	
<input type="checkbox"/>	WB	Gun Violence Prevention Local Initiative	2020	\$ 99997.00	

Obligated Amount

OR

Obligated Percentage

WB Albany/Rensselaer/ Schenectady Counties

Office ALBANY

Region Capital District

OK Cancel



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

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

The screenshot displays the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services (highlighted), Links, JobZone, and NextGen. The main header shows the user name 'Pickett, Polly', SSN, and OSOS ID: NY012312655. A secondary navigation bar includes Achievement Objectives, Services (highlighted), Service History, Enrollments, Outcomes, Empl. Outcomes, Trng. Outcomes, and Comments. The main content area is divided into two sections: 'Detail' and 'Funding'. The 'Detail' section contains various fields for service information, including Service Name (Dental Assistant), Service Desc (ETP Auto load 10/2017), Service ID (87386), Service Type (Occupational Skills Training), Provider Name (Adirondack Dental Assisting School, Inc.), Location Name (Adirondack Dental Assisting School, Inc.), Provider ID (69786), Offering ID (94939), Plan. Start Date (01/15/2023), Plan. End Date (12/30/2023), Actual Start Date (01/15/2023), Actual End Date, Completed Successfully (dropdown), Next Contact Date, Program Service Type (ITA-Training), Part Time Learn. (dropdown), and Distance Learn. (dropdown). The 'Funding' section features a table with columns: Level, Source, Obligated, Actual, and Oblig #. A row is visible with Level 'WB', Source 'Adult Statewide 1', Obligated '\$ 1.00', and Actual '\$ 0.00'. Below the table, there are fields for Total Funding (\$ 1.00), Petition #, RR Event #, and Incumbent Worker Training (dropdown), along with Add, Edit, and Delete buttons. At the bottom, there is a table with columns: Provider Name, Service Name, Actual Start Date, Actual End Date, and Program Svc Type. A row is checked with Provider Name 'Adirondack Dental Assisting School, In', Service Name 'Dental Assistant', Actual Start Date '01/15/2023', and Program Svc Type 'ITA-Training'. At the very bottom, there are buttons for Options, Print List, New Service, Delete Service, Authorization, IPA Service Summary, Payments, Tracking, and a highlighted 'Save' button with a red arrow pointing to it.



ENTERING A SUPPORTIVE SERVICE

Entering an appropriate Supportive Service will be the same process as previously shown. To add a service, click on **New Service**.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

Pickett, Polly SSN: OSOS ID: NY012312655

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

Detail

Service Name: Dental Assistant

Service Desc: ETP Auto load 10/2017

Service ID: 87386

Service Type: Occupational Skills Training

Provider Name: Adirondack Dental Assisting School, Inc.

Location Name: Adirondack Dental Assisting School, Inc.

Provider ID: 69786 Offering ID: 94939

Plan. Start Date: 01/15/2023 Plan. End Date: 12/30/2023

Actual Start Date: 01/15/2023 Actual End Date:

Completed Successfully:

Next Contact Date:

Program Service Type: ITA-Training

Part Time Learn.: Distance Learn.:

Funding

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/> WB	Adult Statewide 1	\$ 1.00	\$ 0.00	

Total Funding: \$ 1.00

Petition #:

RR Event #:

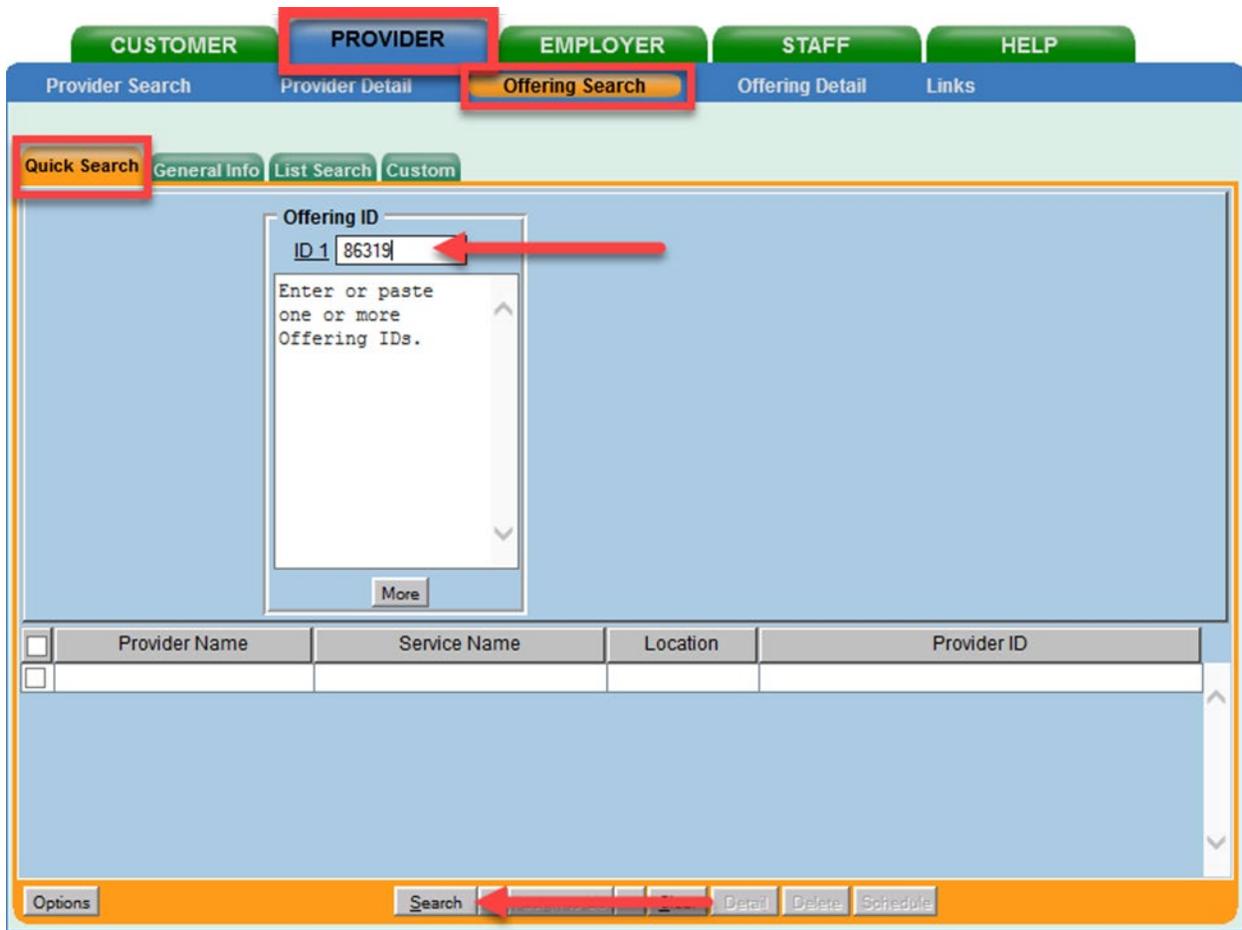
Incumbent Worker Training:

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input checked="" type="checkbox"/>	Adirondack Dental Assisting School, In	Dental Assistant	01/15/2023		ITA-Training

Options Print List **New Service**

After you click the **New Service** button, OSOS will automatically navigate to the **Provider** module. Within the **Provider** module, OSOS will automatically navigate 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:

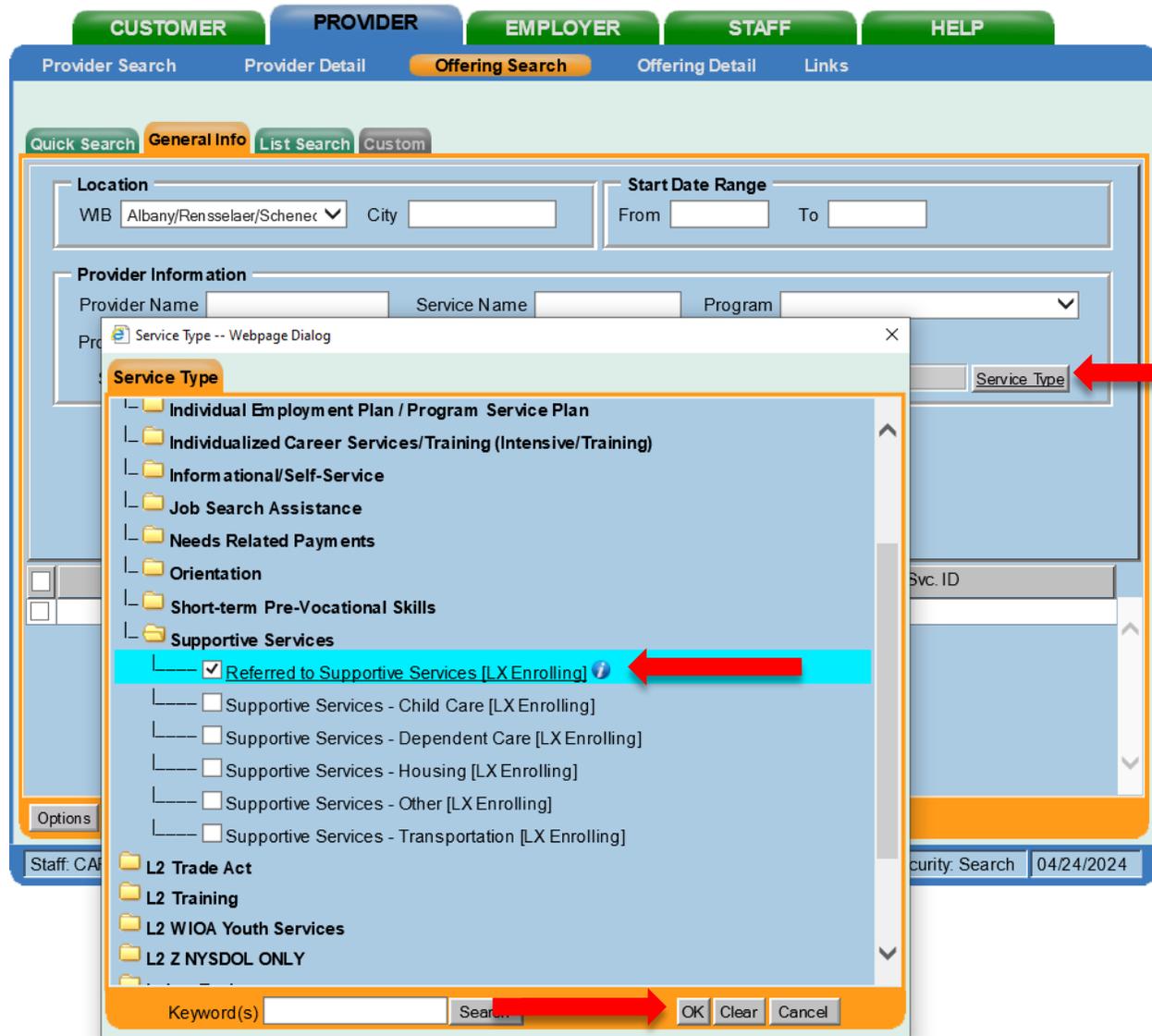
- Top navigation: CUSTOMER, **PROVIDER**, EMPLOYER, STAFF, HELP
- Sub-navigation: Provider Search, Provider Detail, **Offering Search**, Offering Detail, Links
- Quick Search sub-tabs: **Quick Search**, General Info, List Search, Custom
- Offering ID input field: ID 1 [86319]
- Search button: Search

Provider Name	Service Name	Location	Provider ID

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

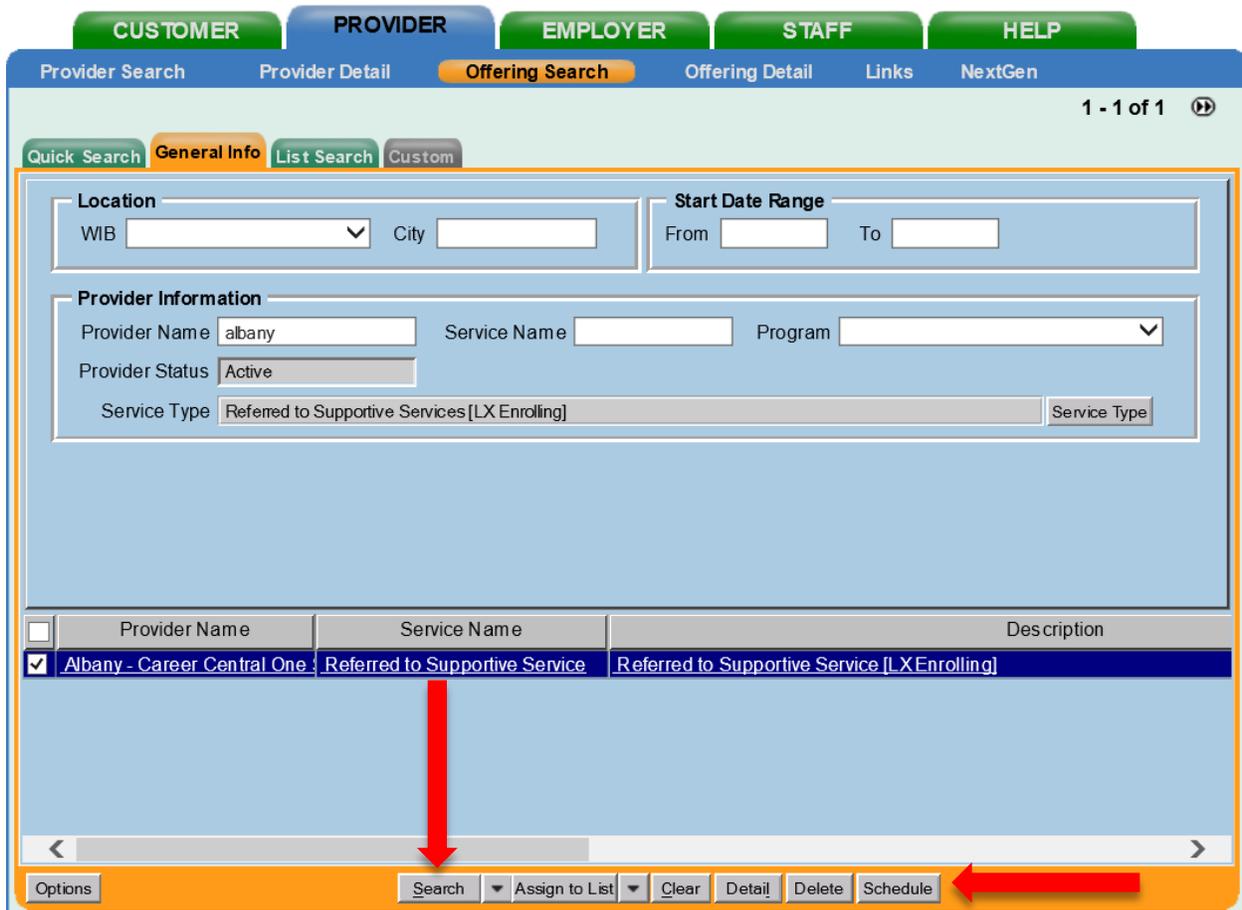
Then, click **Service Type**.

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



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

The results will display in the bottom half of the screen. Select the appropriate Provider/Service from the results and click **Schedule**.



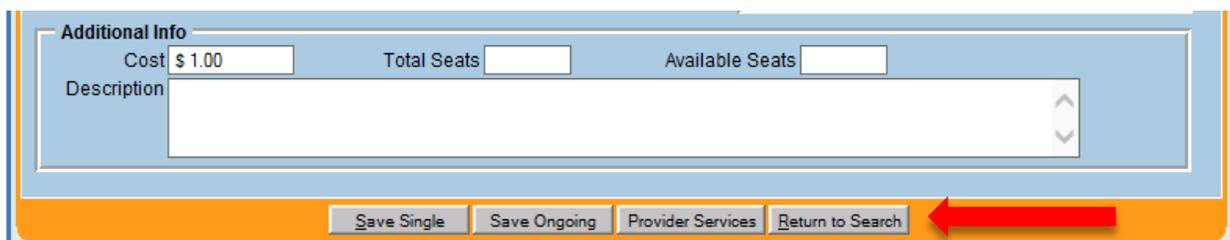
CUSTOMER PROVIDER EMPLOYER STAFF HELP
 Provider Search Provider Detail **Offering Search** Offering Detail Links NextGen
 1 - 1 of 1
 Quick Search **General Info** List Search Custom
 Location: WIB [dropdown] City [input] Start Date Range: From [input] To [input]
 Provider Information:
 Provider Name: albany Service Name: [input] Program: [dropdown]
 Provider Status: Active
 Service Type: Referred to Supportive Services [LX Enrolling] Service Type [input]

<input type="checkbox"/>	Provider Name	Service Name	Description
<input checked="" type="checkbox"/>	Albany - Career Central One	Referred to Supportive Service	Referred to Supportive Service [LX Enrolling]

 Options Search Assign to List Clear Detail Delete Schedule
 (Red arrow points from the result row to the Schedule button)



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



Additional Info:
 Cost: \$ 1.00 Total Seats: [input] Available Seats: [input]
 Description: [text area]
 Save Single Save Ongoing Provider Services **Return to Search**
 (Red arrow points to the Return to Search button)



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

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

The screenshot shows the OSOS interface with the **Services** tab selected. The customer information is Pickett, Polly, SSN: [redacted], and OSOS ID: NY012312655. The **Detail** window on the left contains the following information:

- Service Name: Referred to Supportive Service
- Service Desc: Referred to Supportive Service [LX Enrolling]
- Service ID: 157815
- Service Type: Referred to Supportive Services
- Provider Name: Albany - Career Central One Stop
- Location Name: Albany - Career Central
- Provider ID: 20620, Offering ID: 158492
- Plan. Start Date: 01/15/2023, Plan. End Date: 04/30/2023
- Actual Start Date: 01/15/2023, Actual End Date: [redacted]
- Completed Successfully: [dropdown]
- Next Contact Date: [text box]
- Program Service Type: ITA-Training
- Part Time Learn. [checkbox], Distance Learn. [checkbox]

The **Funding** table is empty. Below it are fields for Total Funding, Petition #, RR Event #, and Incumbent Worker Training. At the bottom, a table lists services:

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Adirondack Dental Assisting School, In	Dental Assistant	01/15/2023		ITA-Training
<input checked="" type="checkbox"/>	Albany - Career Central One Stop	Referred to Supportive Service	01/15/2023		A-Training

A red arrow points to the **01/15/2023** date in the table. The bottom navigation bar includes buttons for Options, Print List, New Service, Delete Service, Authorization, IPA Service Summary, Payments, Tracking, Save, Customer Detail, Comp Assess, and Comments.



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

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

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

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

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

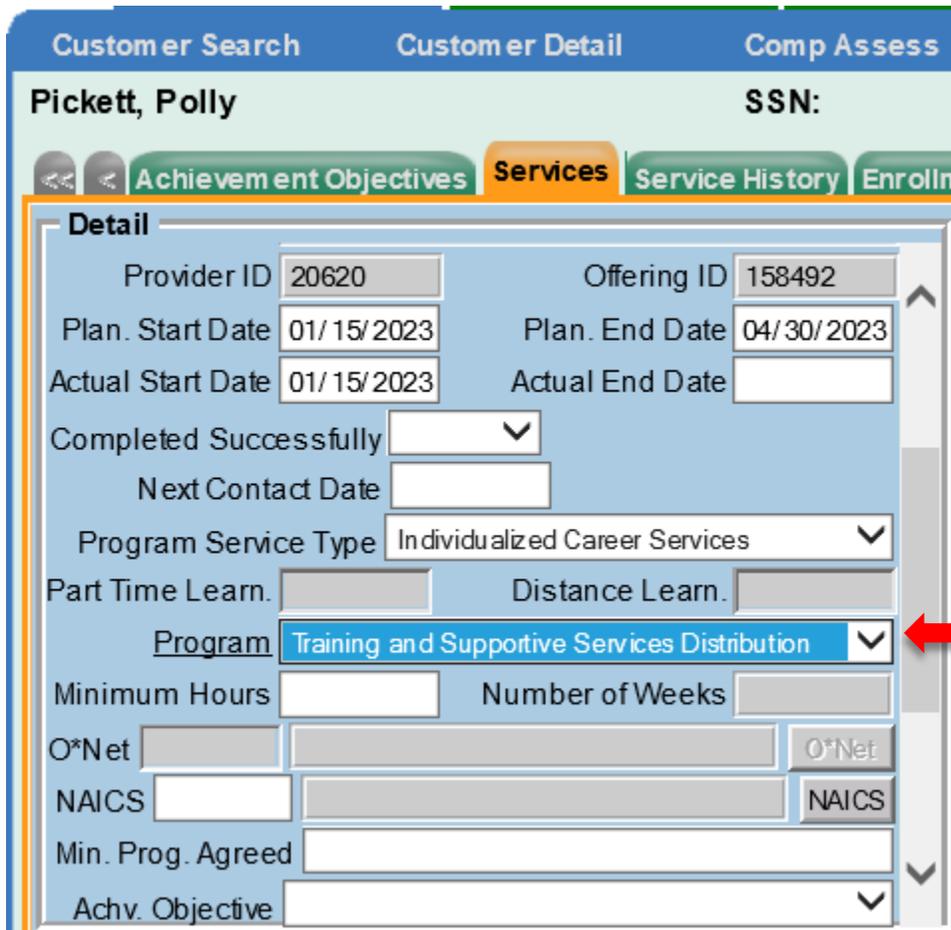
Program Service Type – Select the appropriate program service type corresponding to the type of service.

O*NET – The O*Net code must be entered for a training service. 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.

Under Program, select **Training and Supportive Services Distribution** from the list.



Customer Search Customer Detail Comp Assess

Pickett, Polly SSN:

<< < Achievement Objectives **Services** Service History Enrollment

Detail

Provider ID	20620	Offering ID	158492
Plan. Start Date	01/15/2023	Plan. End Date	04/30/2023
Actual Start Date	01/15/2023	Actual End Date	
Completed Successfully	▼		
Next Contact Date			
Program Service Type	Individualized Career Services ▼		
Part Time Learn.		Distance Learn.	
Program	Training and Supportive Services Distribution ▼		
Minimum Hours		Number of Weeks	
O*Net		O*Net	
NAICS		NAICS	
Min. Prog. Agreed			
Achv. Objective	▼		

ADD FUNDING

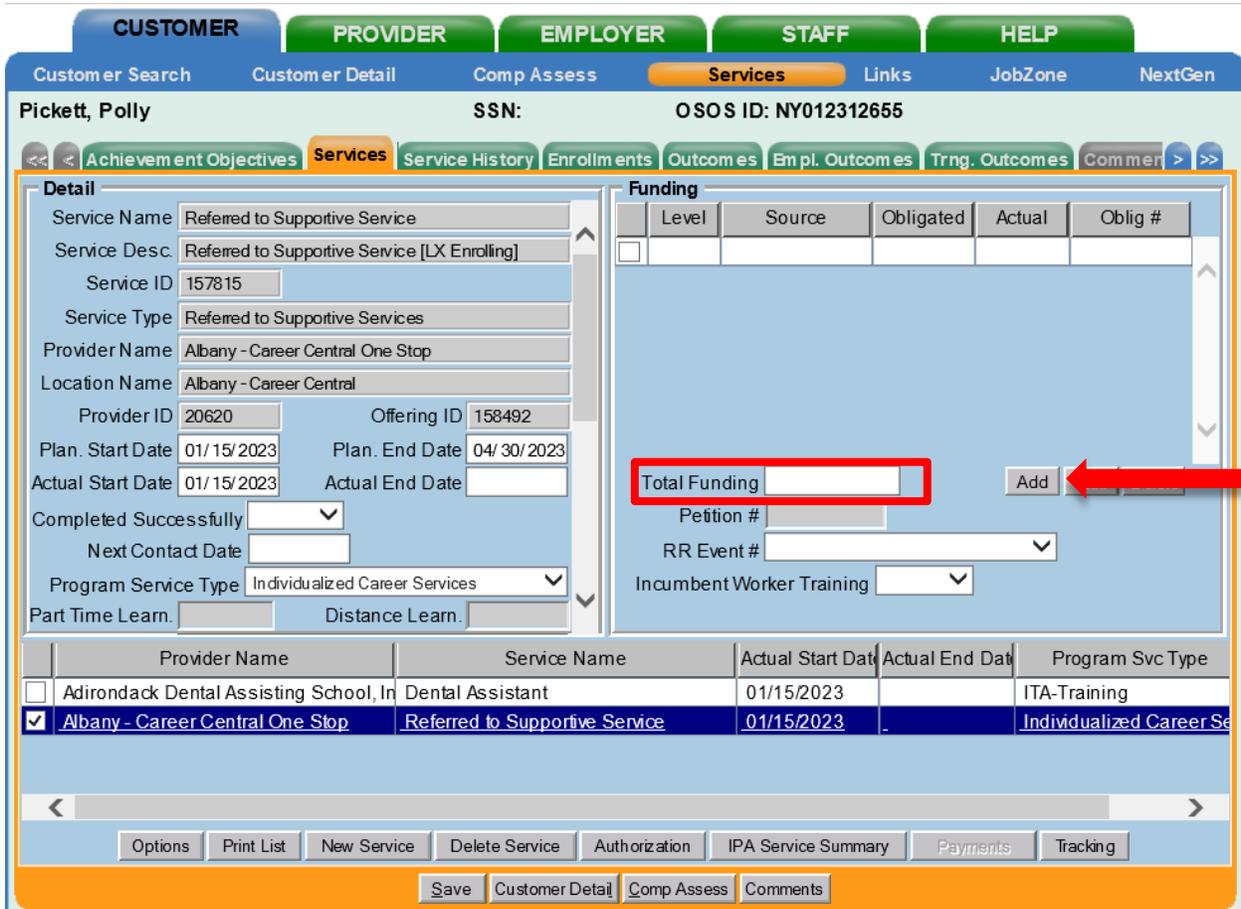
Next, complete the **Funding** section (right hand side) for the service.

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

Click the **Add** button.



OSOS is not used as a financial tracking system. It is only used to track programmatic services provided. For this reason, the \$1.00 entry acts as a placeholder so that the system will designate a funding source to be attached to the service. This allows the system to track services provided under this funding.



The screenshot shows the OSOS interface for a customer named Polly Pickett. The 'Services' tab is active, and the 'Funding' section is highlighted. The 'Total Funding' field is empty and highlighted with a red box, with a red arrow pointing to the 'Add' button next to it. Below the 'Funding' section, there is a table of services with columns for Provider Name, Service Name, Actual Start Date, Actual End Date, and Program Svc Type. The table shows two services: 'Adirondack Dental Assisting School, In' and 'Albany - Career Central One Stop'.

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

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/> Adirondack Dental Assisting School, In	Dental Assistant	01/15/2023		ITA-Training
<input checked="" type="checkbox"/> Albany - Career Central One Stop	Referred to Supportive Service	01/15/2023		Individualized Career Se



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

Check the box next to **Adult Statewide 15%** or if a DW, choose **Dislocated Worker Statewide 15%**, as the 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"/>	WB	WMOA Adult Local	2021	\$ 99989.00	
<input type="checkbox"/>	WB	WMOA Adult Local	2022	\$ 99987.00	
<input type="checkbox"/>	WB	WMOA Adult Local	2023	\$ 99992.00	
<input type="checkbox"/>	WB	WMOA Dislocated Worker Local	2021	\$ 99999.00	
<input type="checkbox"/>	WB	WMOA Dislocated Worker Local	2022	\$ 99995.00	
<input type="checkbox"/>	WB	WMOA Dislocated Worker Local	2023	\$ 99998.00	
<input type="checkbox"/>	WB	WMOA Youth Local	2021	\$ 99999.00	
<input type="checkbox"/>	WB	WMOA Youth Local	2022	\$ 99998.00	
<input type="checkbox"/>	WB	WMOA Youth Local	2023	\$ 100000.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2021	\$ 99999.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2022	\$ 99999.00	
<input type="checkbox"/>	WB	Youth Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2021	\$ 100000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2022	\$ 100000.00	
<input type="checkbox"/>	WB	Dislocated Worker Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	WB	Adult Statewide 15%	2021	\$ 100000.00	
<input type="checkbox"/>	WB	Adult Statewide 15%	2022	\$ 100000.00	
<input checked="" type="checkbox"/>	WB	Adult Statewide 15%	2023	\$ 100000.00	
<input type="checkbox"/>	State	DHP State Funded	2023	\$ 99991.00	
<input type="checkbox"/>	WB	Gun Violence Prevention Local Initiative	2020	\$ 99997.00	

Obligated Amount OR Obligated Percentage

WB
 Office
 Region

OK Cancel



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

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

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

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

Pickett, Polly **SSN:** **OSOS ID: NY012312655**

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

Detail

Service Name: Referred to Supportive Service

Service Desc: Referred to Supportive Service [LX Enrolling]

Service ID: 157815

Service Type: Referred to Supportive Services

Provider Name: Albany - Career Central One Stop

Location Name: Albany - Career Central

Provider ID: 20620 Offering ID: 158492

Plan. Start Date: 01/15/2023 Plan. End Date: 04/30/2023

Actual Start Date: 01/15/2023 Actual End Date:

Completed Successfully:

Next Contact Date:

Program Service Type: Individualized Career Services

Part Time Learn.: Distance Learn.:

Funding

Level	Source	Obligated	Actual	Oblig #
<input checked="" type="checkbox"/>	WB	Adult Statewide 1	\$ 1.00	\$ 0.00

Total Funding: \$ 1.00 Add Edit Delete

Petition #:

RR Event #:

Incumbent Worker Training:

	Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Adirondack Dental Assisting School, In	Dental Assistant	01/15/2023		ITA-Training
<input checked="" type="checkbox"/>	Albany - Career Central One Stop	Referred to Supportive Service	01/15/2023		Individualized Career Se

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

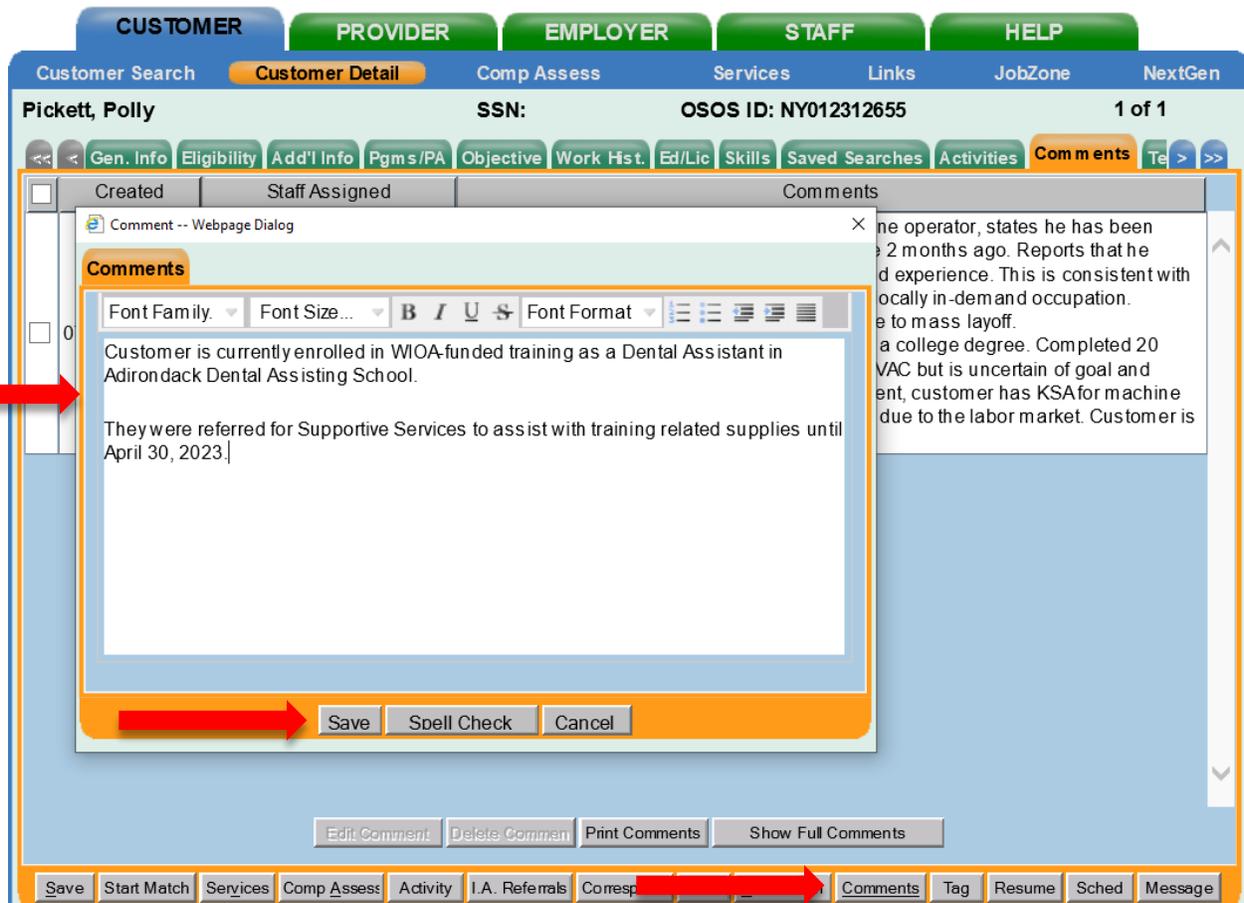
Save Customer Detail Comp Assess Comments

ENTERING COMMENTS

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

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

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

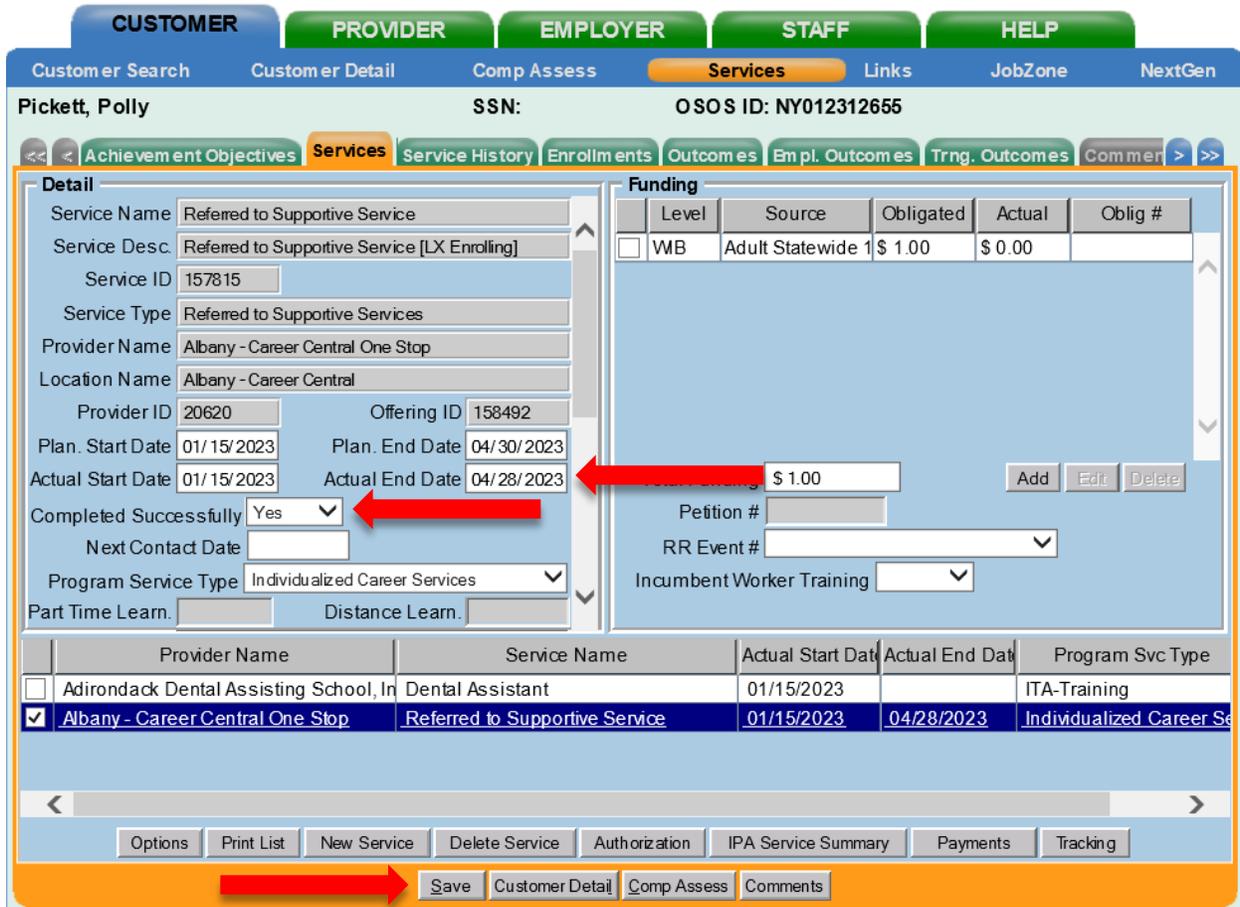


The screenshot displays the OSOS interface for a customer named Pickett, Polly. The main window shows the 'Customer Detail' tab, with various navigation options like 'Gen. Info', 'Eligibility', and 'Comments'. A 'Comment -- Webpage Dialog' box is open, allowing the user to enter a comment. The comment text is: 'Customer is currently enrolled in WIOA-funded training as a Dental Assistant in Adirondack Dental Assisting School. They were referred for Supportive Services to assist with training related supplies until April 30, 2023.' The dialog box includes a 'Save' button, a 'Spell Check' button, and a 'Cancel' button. A red arrow points to the 'Save' button. Another red arrow points to the 'Comments' button in the bottom navigation bar.

CLOSING A SERVICE

It's important to always close Services upon completion. Services that continue without an Actual End Date can continue enrollment or generate errors due to gaps between Services.

To close a Service, enter an **Actual End Date** in the field and select **Completed Successfully** as Yes/No. Once updated, click **Save**.



The screenshot shows the OSOS interface for a customer named Pickett, Polly. The 'Services' tab is active, displaying details for a service named 'Referred to Supportive Service'. The 'Actual End Date' is set to 04/28/2023, and 'Completed Successfully' is set to 'Yes'. A red arrow points to the 'Actual End Date' field, another to the 'Completed Successfully' dropdown, and a third to the 'Save' button at the bottom.

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>	WB Adult Statewide 1	\$ 1.00	\$ 0.00	

Provider Name	Service Name	Actual Start Date	Actual End Date	Program Svc Type
<input type="checkbox"/>	Adirondack Dental Assisting School, In	01/15/2023		ITA-Training
<input checked="" type="checkbox"/>	Albany - Career Central One Stop	01/15/2023	04/28/2023	Individualized Career S



*The service must be closed when it has ended. To close a service, navigate to the **Customer** module, **Services** window, **Services** tab. Select the service that must be closed. Then enter the end date for the training service and click **Save**. The service is now closed.*



ENTER OUTCOMES

When working with customers and providing WIOA funded services, training and employment data entry must be completed. All training and employment outcomes must be documented in the Training and Employment Outcomes tabs.

Guidance on entering Training and Employment outcomes can be found at dol.ny.gov/system/files/documents/2021/03/wioa-performance-measures-and-outcomes-guide_0.pdf.

RESOURCES AND ASSISTANCE

Documenting Dislocated Worker Status: [Documenting Dislocated Worker Status \(ny.gov\)](#) and PGL #[22-01](#): New York State Department of Labor (NYSDOL) guidance and interpretation on the Workforce Innovation and Opportunity Act (WIOA) definition of Dislocated Worker (DW) and recording DWs in the One-Stop Operating System (OSOS)

Adult Priority of Service: [Workforce Development System Technical Advisory #23-01: Serving Priority Populations and Priority of Service under the Workforce Innovation and Opportunity Act \(WIOA\) Title I Adult Program \(ny.gov\)](#)

L2 Services [L2 SERVICES – As Presented In The OSOS Provider Module \(ny.gov\)](#)

Comprehensive Assessment and Supplemental Data OSOS Guide: [Comprehensive Assessment and Supplemental Data OSOS Guide \(December 30, 2022\) \(ny.gov\)](#)

OSOS Guide: Creating a Basic Customer Record: [Microsoft Word - Creating a Basic Customer Record OSOS Guide 12-10-2018 \(ny.gov\)](#)

OSOS Guide: WIOA Performance Measures and Outcomes: dol.ny.gov/system/files/documents/2021/03/wioa-performance-measures-and-outcomes-guide_0.pdf

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: Help.OSOS@labor.ny.gov