



Syracuse I-81 Project OSOS Guide



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PURPOSE

New York State Department of Labor (NYSDOL) has partnered with the Onondaga County Local Workforce Development Area (LWDA) to target job seekers as prospective trainees for immediate enrollments in Career Training Programs for occupations identified by the New York State Department of Transportation (NYSDOT) I-81 Job Title List. In August 2020, City of Syracuse Mayor Ben Walsh launched the "I-81 Viaduct Jobs Project Big Table" community-wide discussion. Outcomes of these collaborative processes resulted in a Trades Pipeline Design "Road Map" with key components to target job seekers as prospective trainees to enroll in Career Training Programs for various occupations including Welder/Fitter, Construction Trades, CDL A & B, and Heavy Equipment Operators.

The One-Stop Operating System (OSOS) is the primary case management system used for tracking all services provided to customers throughout the Workforce Development System. OSOS collects substantial information from customers, businesses, and training providers. This information is also used to prepare required State and Federal reports.

This guide provides instructions on how to conduct the OSOS data entry for the Syracuse I-81 Project.

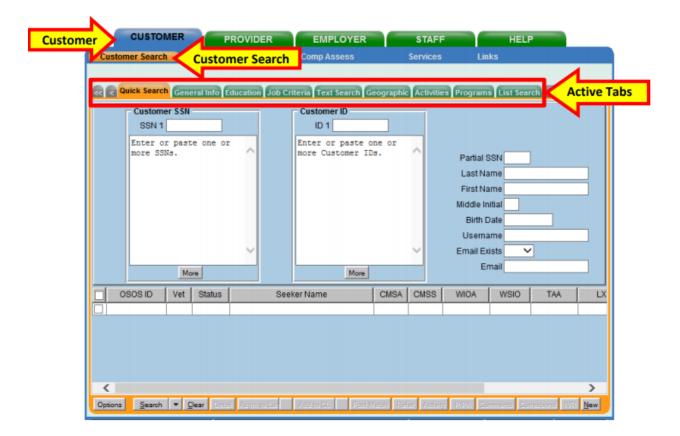


SEARCHING FOR THE CUSTOMER

When staff enter customer data into OSOS, it is important to determine if a record already exists for the customer. In addition, there may be instances where there are two existing records, or duplicate records, for the customer. When this occurs, we often see that one account has a Social Security Number and one does not. Following the instructions below ensures that any duplicate records can be found and addressed accordingly.

Searches are performed within the **Customer Search** window, in the **Customer** module.

While searches are most commonly performed from the **Quick Search** tab, any of the active tabs can be used in the search process. In addition, once you are case managing a customer, and their Customer ID is known, you may search for the customer using the Customer ID field.





QUICK SEARCH

A customer search is most commonly performed from the **Customer Search** window, **Quick Search** tab. There are numerous ways a customer search can be conducted depending on the information the staff has obtained. Staff will mainly search by **Customer Full** or **Partial Name**.

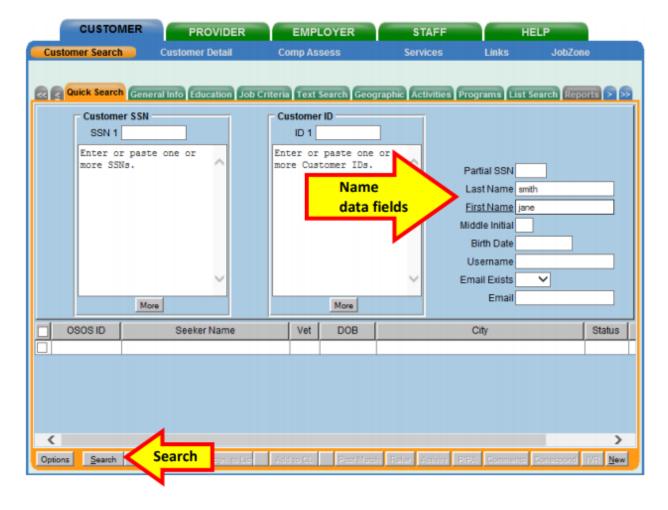
SEARCHING BY CUSTOMER FULL OR PARTIAL NAME

Staff may search for a customer record by full or partial name. Enter as much information as is known in the **Last Name** and **First Name** data fields.



As a best practice, staff should perform a name search for any customer they are working with to determine if duplicate OSOS records exist for the same customer. If a duplicate record is found, please contact help.osos@labor.ny.gov.

Click the **Search** button.

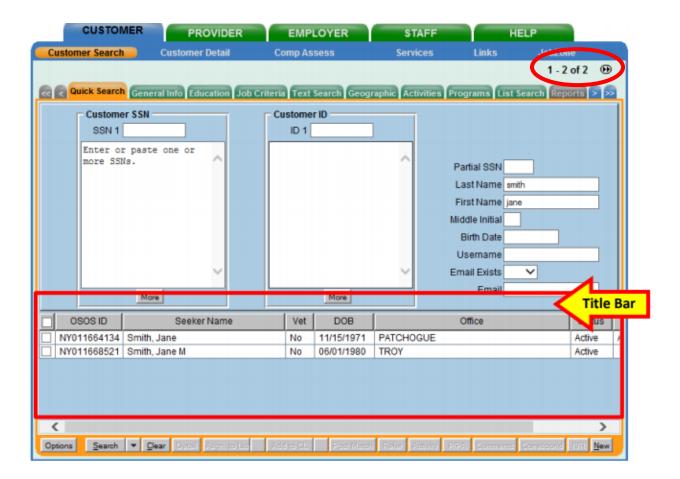




If there is only one result returned, OSOS will display the customer's record. It will default to the **General Information** tab of the **Customer Detail** window.

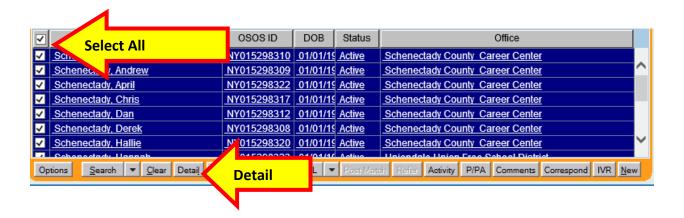


If there is more than one customer record matching the search criteria, the customers' information will be displayed in the window below the data entry fields.



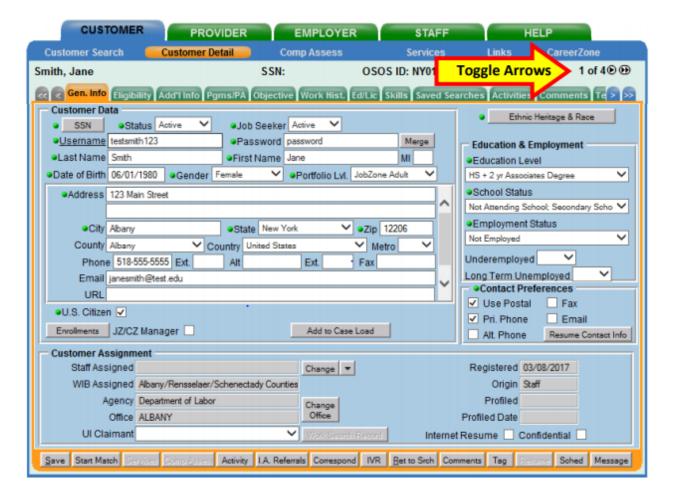


If the search yields more than one result, staff can view all the records by first clicking on the check box in the top left-hand corner of the gray title bar. This will select all the results. Staff can then click on **Detail** at the bottom of the screen to review all selected customer records.





OSOS will display the customer record of the first customer selected. Use the arrows at the top right corner of the screen to toggle through the customer records. Staff can review the records to identify the customer they were searching for, as well as to identify potential duplicate records.

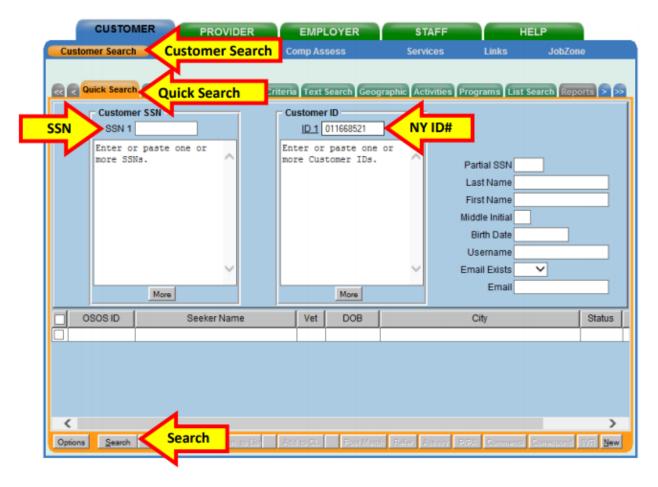




SEARCHING BY FULL SOCIAL SECURITY NUMBER OR NY ID

Once staff are case managing a particular customer, they can search by **Customer SSN** or **Customer ID** in the **Quick Search** tab to find the customer record.

Then click the **Search** button at the bottom of the screen.



If there is a matching record, OSOS will display the customer's record. If there is no matching record, the system will display **No Matches Found** in the upper right-hand corner.

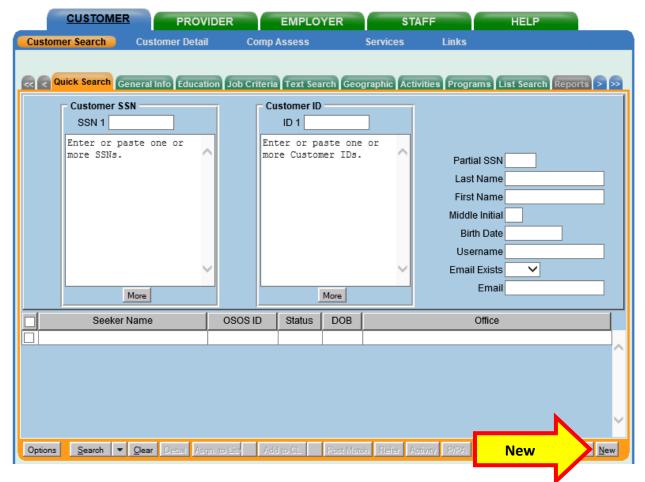


The search can be based on either SSN or ID number, but it cannot be based on both. Including data in both the **Customer SSN** field and the **Customer ID** field will result in an error message.

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If an existing customer record cannot be found, click the **New** button at the bottom of the screen to create a new customer record.



For detailed information on searching for a customer record, please see the <u>Performing a Customer Search OSOS Guide</u>.

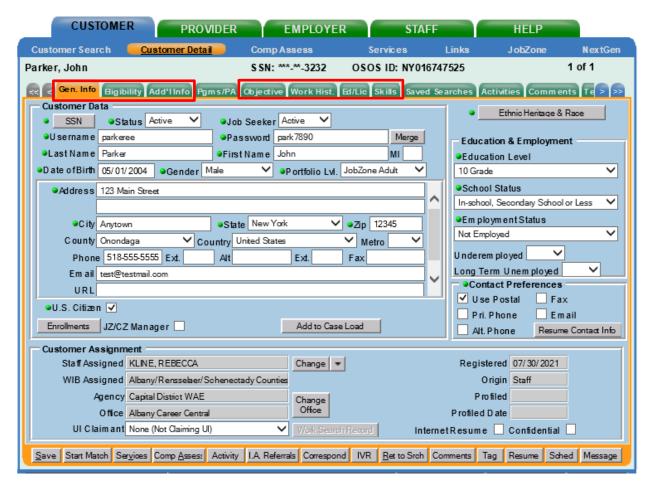
For detailed information on creating a customer record, please see the <u>Creating a Basic Customer Record OSOS Guide</u>.



BASIC CUSTOMER RECORD

Creating or updating a basic customer record requires data entry in seven tabs. These tabs are located in the **Customer** module, **Customer Detail** window. They are:

- **Gen. Info** tab (General Information)
- Eligibility tab
- Add'l Info tab (Additional Information)
- Objective tab
- Work Hist. tab (Work History)
- Ed/Lic tab (Education/Licenses)
- Skills tab





All required fields in OSOS are indicated by a green dot • in front of the field name.



To save the basic customer record, all required fields must be completed. However, to best serve the customer, staff should always enter as much information as possible.



Do not click Save until all the required information, in all tabs, is recorded for the complete basic customer record. If Save is selected before the data is completely entered, it will generate an error message. If this error message does appear, you will still be able to continue with the record by clicking OK and continuing to enter the information. Instead, when creating the customer record, simply select the next appropriate tab. Click Save when all the required information has been entered.

Staff must review all of the information in the customer record each time they work with the customer. This ensures that the record reflects the most up to date and accurate information.

BASIC CUSTOMER RECORD DETAILS

For detailed instructions on creating a basic customer record, please see the <u>Creating a Basic Customer Record OSOS Guide</u>.

Below are some noteworthy points for filling out the tabs located within the **Customer Detail** window.

General Info Tab

• **SSN**: The SSN field is located "behind" a button in order to keep it as confidential as possible. When the customer provides their SSN it must be entered. Having an SSN in OSOS is very important because customer SSNs are used to match against wages and determine if the customer is employed. Entering a customer's SSN also helps prevent duplicate records.





Ethnic Heritage & Race: Select the Ethnic Heritage & Race button. If the
customer provides Ethnic Heritage and/or Race information, select the most
appropriate choice. If no information is provided, select Not Disclosed. This
information is also located "behind" the button in order to keep it as confidential
as possible.





- Portfolio Level A new record will default to JobZone Adult. You may keep this
 designation and therefore create the JobZone account along with the new OSOS
 record. Or, if the youth is younger than 18, you can choose the highest level of
 education completed (ex: Tenth Grade) in order to create a CareerZone account
 along with the new OSOS record.
- Username and Password While this is a required field, any record with Portfolio LvI set to JobZone will not use these fields for JobZone access. All Portfolio LvIs other than JobZone Adult will use these fields as login credentials for CareerZone. Any unique username and any password may be entered in these fields, as long as they are at least 6 characters in length.





Note: If you are creating a new customer record, the Portfolio Level selected should reflect the highest grade level that the youth has completed. If an OSOS record already exists for the youth, **do not change the Portfolio Level in OSOS.**



Additional Info Tab

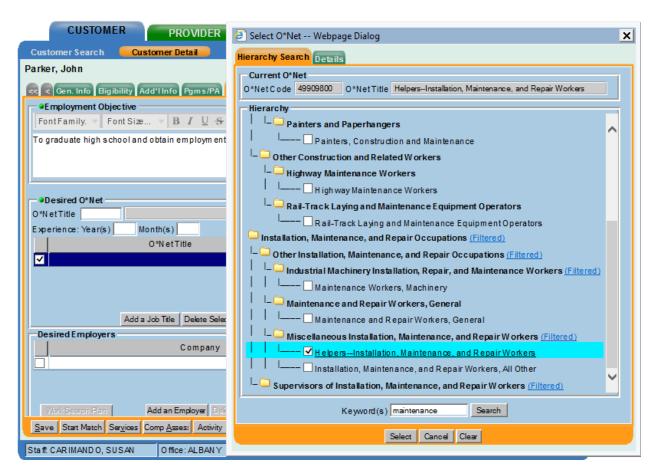
Veteran Status is the only required field on this tab. Additional information entered on this tab can be used to match customers to relevant job postings.

Programs / PA Tab

This tab does not contain any required information. If the participant is receiving
public assistance use the check box next to the title, and then fill in the Reg Date.
If the customer is unsure of when they began receiving public assistance, ask
them for their best approximation.

Objective Tab

• **Desired O*Net**: At least one **O*Net title** is required. Click the **Add a Job Title** button. Then, click the **O*Net Titles** button. This opens the Select O*Net Webpage Dialogue box. Use the Keyword search at the bottom or the O*Net folder hierarchy to find the job title most closely related to the employment the participant is seeking. Check the box next to the job title. Then click **Select**.

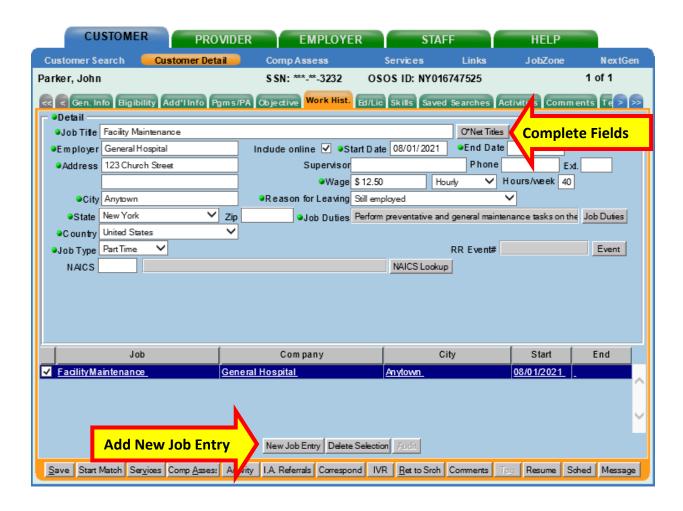


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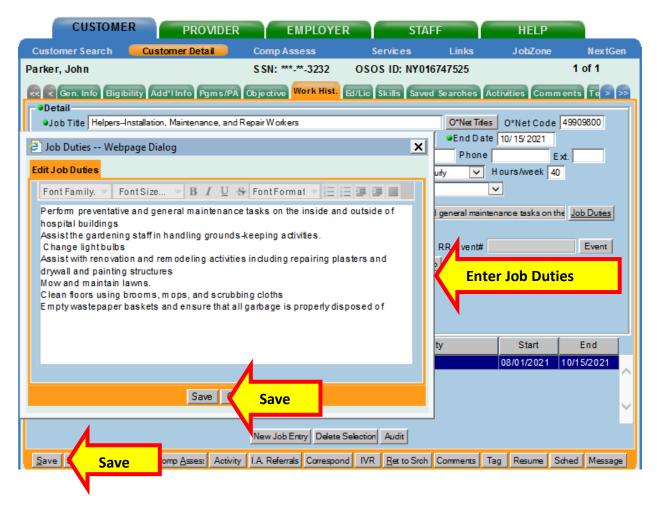
Work History Tab

Select New Job Entry to enter a work history for the customer. Enter all required fields and any additional information provided by the customer. If the customer does not have any Work History, select No Information Provided.





Click the **Job Duties** button to open up a new webpage dialog box. Enter the job duties in the freeform text box and click **Save**.



Ed/Lic Tab

 There are three required sections within this tab; Certificates/Licenses, Schools, and Professional Associations. If the customer does not have information to enter in these sections, select No Information Provided under each section.

Skills Tab

• Additional Skills Text: Enter any additional skills and abilities that are important to the customer's job performance.



Once the **Skills** tab is completed, and the entire basic customer record has been entered, click the **Save** button at the bottom of the screen. **Record Saved** will briefly be displayed in the upper right-hand corner when the record is successfully saved. If there are fields missing information, an Error Message pop up box will indicate the error.



CASE NOTES

It is important to document case notes in the customer record. It is best practice to record case notes every time staff work with the customer. Case notes are documented in the **Customer** module, **Customer Detail** window, **Comments** tab.



Case notes should include details of the appointment that are not recorded anywhere else in OSOS. They should be clear, factual, relevant to employment, and show a logical progression. Case notes allow staff to gain a more complete understanding of the customer's situation.



COMPREHENSIVE ASSESSMENT

Information documented in the Comprehensive Assessment window is important for recording the customer's barriers and challenges. For detailed instructions on completing the Comprehensive Assessment, please see the Comprehensive Assessment & Supplemental Data Guide.

Many of the fields in Comp Assess are used to determine eligibility under WIOA programs. Since the I-81 Grant is a state funded program, participants do not need to be co-enrolled in the WIOA programs. Participants served solely under this grant will not be included in WIOA performance. For the purposes of this initiative, providers should only enter information that is known. If the information is unknown, please select **No** or **Not Disclosed**.

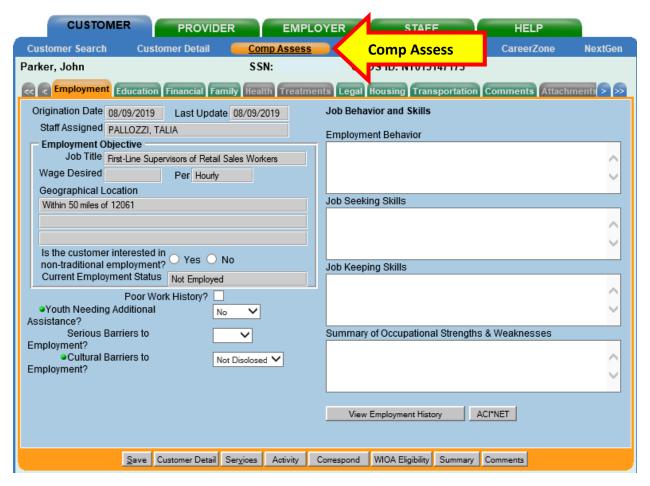
In order to provide additional services to participants, Local Areas may choose to co-enroll in WIOA. If a customer is being enrolled in both the I-81 Grant and the WIOA programs, then information required under WIOA must be entered in OSOS. Once a customer is co-enrolled, all WIOA eligibility, data entry, and reporting requirements must be followed. Co-enrolled customers will be included in Local Area Performance measures.

The **Comp Assess** window is located in the **Customer** module.



When information is entered into the Comprehensive Assessment section, all required data fields (as indicated by a green dot) must be completed in order to save the record.







Below are some noteworthy points for filling out the tabs located within the **Comprehensive Assessment** window for participants only enrolled under the I-81 Grant. However, as a best practice, staff should always enter as much information as known about the customer to better serve and meet their needs.

Employment Tab

- Youth Needing Additional Assistance: Local area determines what youth will fall into this category. For the purposes of this initiative, staff may select No.
- **Cultural Barriers to Employment**: This information is collected as a requirement under WIOA and is not related to this initiative. Staff may select **Not Disclosed**.

Education Tab

- Basic Skills Deficient/Low Levels of Literacy: Providers do not need to determine basic skills deficiency. Only enter this information if it is known. If unknown, select No.
- English Language Learner: An English Language Learner will have limited ability in speaking, reading, writing or understanding English. They may also meet one of the following two conditions:
 - o Their native language is a language other than English; or
 - They live in a family or community where a language other than English is the main language.

Financial Tab - Do not enter any information into this tab.

Family Tab

- **Marital Status** Select the option that most closely reflects the customer's marital status. Or, select **Not Disclosed**.
- Family Status Select the option that most closely reflects the customer's family status. In most cases, such as a non-parenting youth, the customer is considered an Other Family Member. Or, select Not Disclosed.
- **Is Customer parenting youth?** Female youth customers are considered parenting once pregnant. Alternatively, male youth customers are only considered parenting once their child is born.



Female customers will have the additional required field **Is customer pregnant?** If **Yes** is selected, staff must enter a **Delivery Date**.



Health tab and **Treatment** tabs are both greyed out and not accessible. They require no action.

Legal Tab - There is no required information located in this tab. However, if the customer discloses that they are an ex-offender, staff should select **Yes**. If the customer identifies as an ex-offender, record relevant comments in the **Customer Detail** window, **Comments** tab. Information recorded would include when the conviction occurred, and whether the customer has work restrictions. Comments must be specific to job search restrictions and work search restrictions only.

Housing Tab

• **Current Housing** - Select the option that most closely reflects the customer's current housing status. Many youth will not own or rent their own home, so this information should be based on their care taker. For instance, if the youth lives in a home owned by their parent(s), select **Own**. Or, select **Not Disclosed**.

Comments Tab - Do not use the **Comments** tab located within the **Comp Assess** window. Any **Comments** must be recorded in the **Customer Detail** window, **Comments** tab.



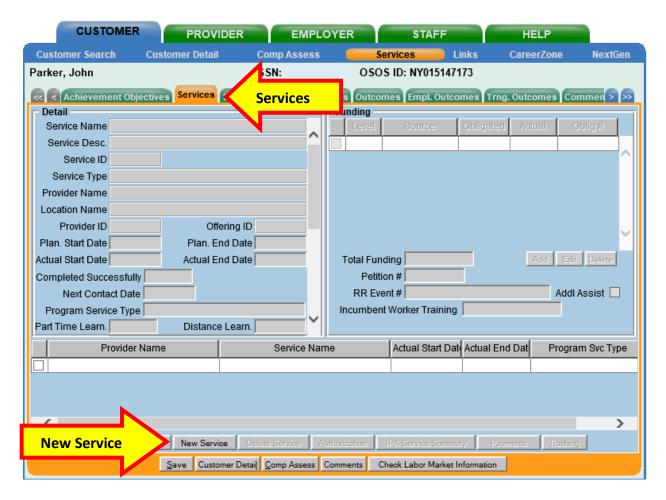
SERVICES

Staff use the **Services** window in OSOS to record the services provided to the customer.

ENTERING THE SERVICE

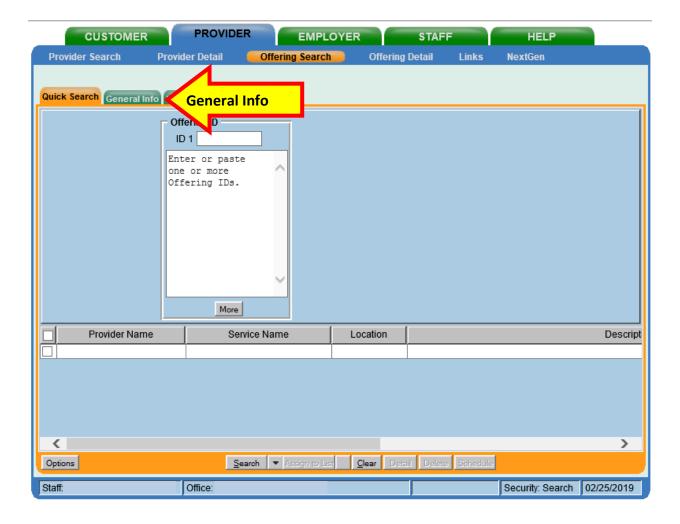
To record a service, first select the **Services** tab.

Select the New Service button.





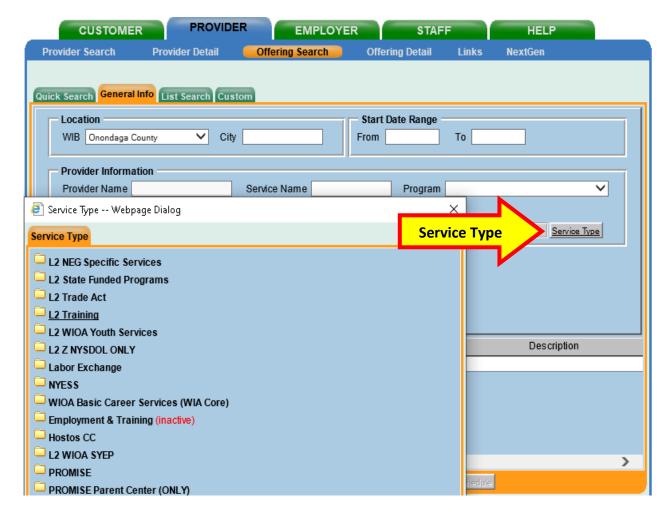
This navigates to the **Provider** module, **Offering Search** window, **Quick Search** tab. Select the **General Info** tab.



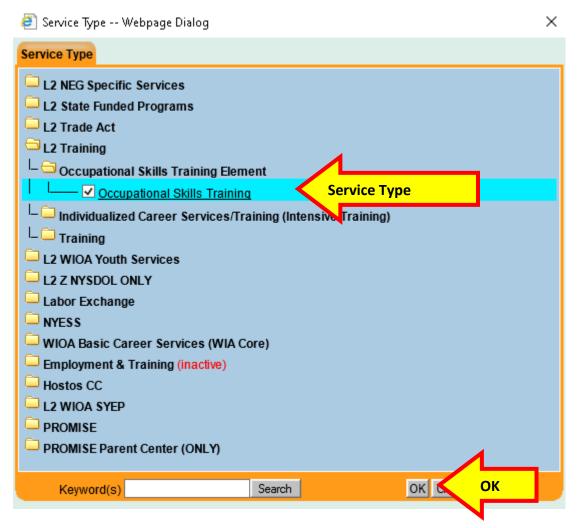


Verify the correct **WIB** is selected

Click the **Service Type** button to bring up a new webpage dialog box.



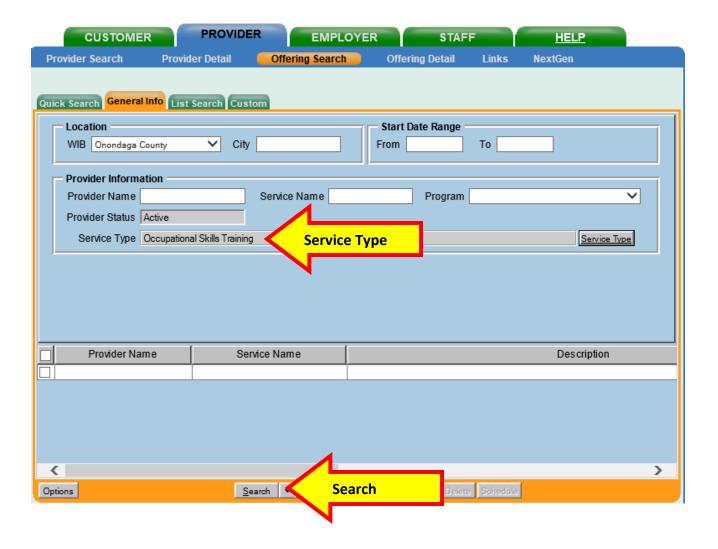




Select the corresponding **Service Type** being provided to the participant and click **OK**.



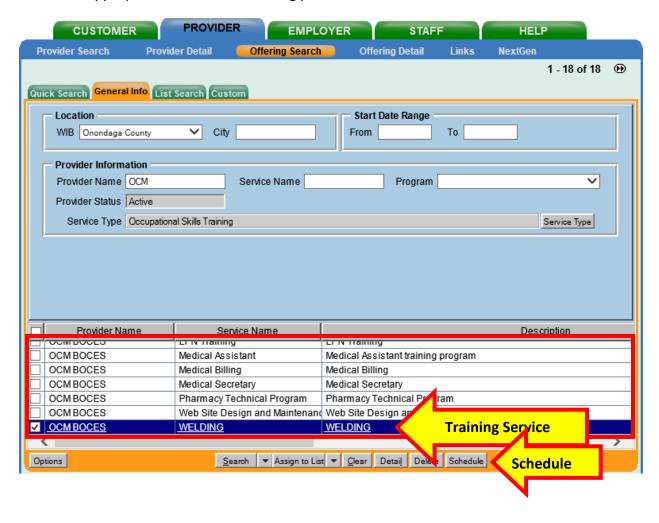
Once the **Service Type** is chosen, click **Search**.





The search results will be presented at the bottom of the screen.

Select the appropriate service that is being provided and click **Schedule**.

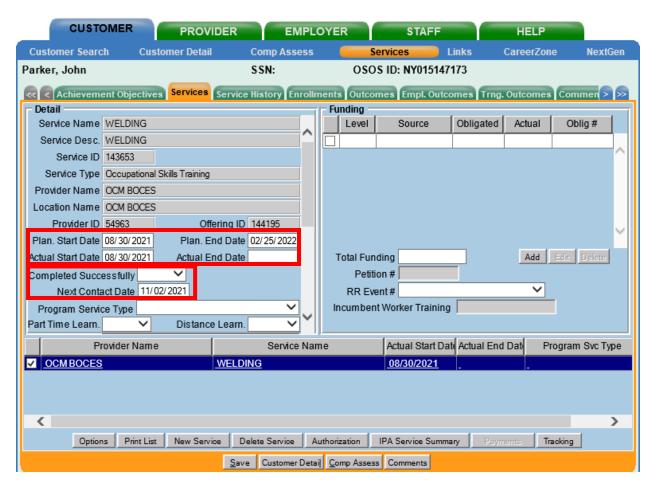




This brings you to the **Customer** module, **Services** window, **Services** tab. Select the Service using the check box in the far-left column.

Enter the following fields in the Detail section: **Plan Start Date**, **Plan End Date**, and **Actual Start Date**. If the service provided is ongoing, do not enter an **Actual End Date** until the service is complete. Instructions for closing a service are provided later in this guide. As a best practice, enter a **Next Contact Date** to follow-up. A reminder will show up in your Staff Inbox when it's time to review the Service.

Many services may be provided in one day. If this is the case, enter the same date in all four date fields and select the appropriate option on the **Completed Successfully** drop-down menu. If a training spans over a course of time beyond one day, then you will select **Completed Successfully** (yes/no) once the training has ended.



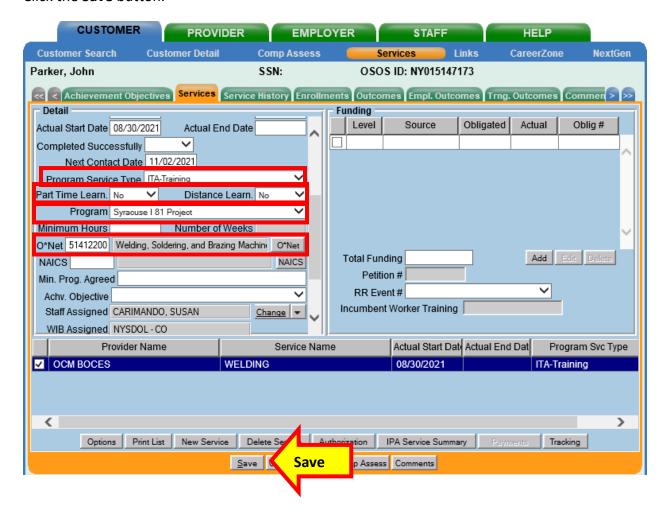


Choose an appropriate **Program Service Type**. This will vary based on the service provided. If you are recording an occupational skills training, select **ITA-Training**. If you are recording an On-the-Job training, select **Non-ITA Training**. Other services will be recorded as either **Basic Career Services** (for example, assessment or career guidance) or **Individualized Career Services** (for example, supportive services.)

For **Program**, select the **Syracuse I 81 Project** from the drop-down menu. **Syracuse I 81 Project** needs to be selected when recording a service under this grant.

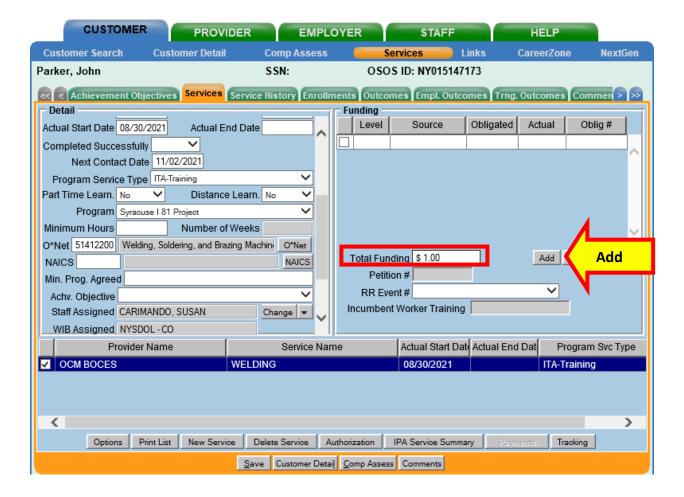
If you are recording a training service, select the **O*Net Title** which corresponds to the training. You will also need to indicate if the training is part-time (yes/no) and if the training is offered via distance learning (yes/no.)

Click the **Save** button.





Next, you will attach the funding. Enter 1 into the **Total Funding** field. Then click the **Add** button.



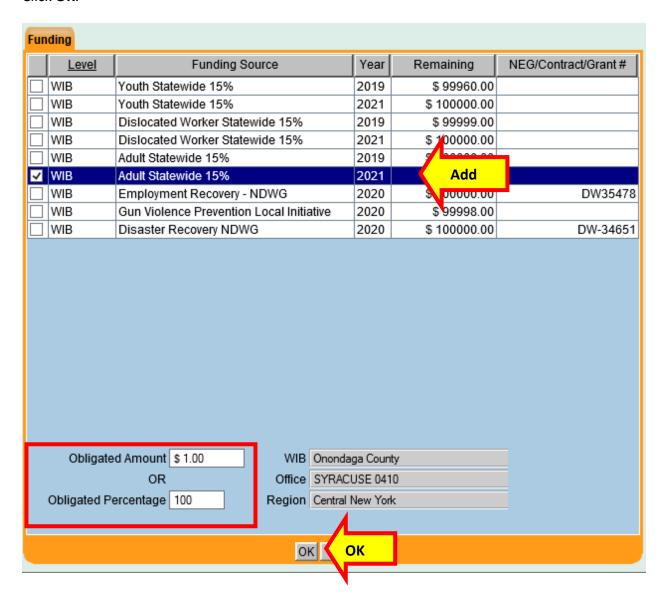


The Funding Webpage Dialogue box will open.

Select the **Adult Statewide 15%** funding.

Enter 1 in the **Obligated Amount** field. This will automatically populate the **Obligated Percentage** field as 100.

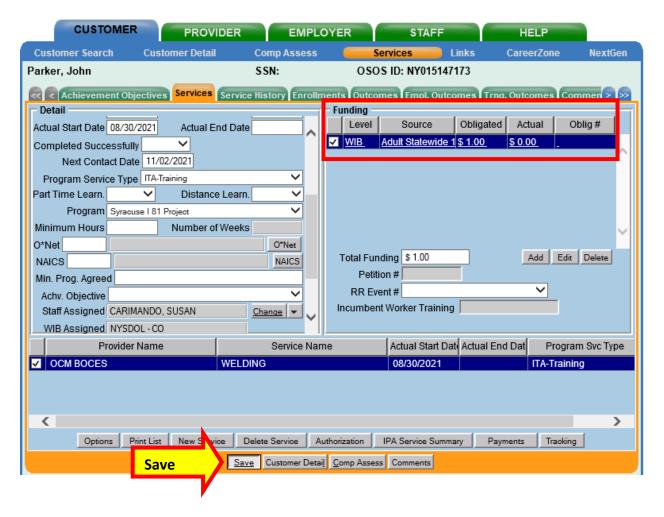
Click OK.





The appropriate funding has now populated the **Funding** section.

Click Save at the bottom of the screen.

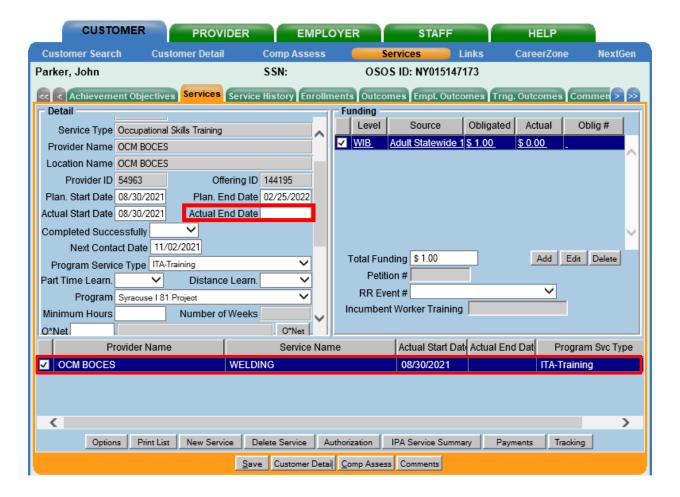




CLOSING A SERVICE

It is important that an **Actual End Date** is added to a service when the service has ended. This is called closing the service. Funded services, other than Follow-Up Services, that remain open will prevent a customer from exiting their enrollment.

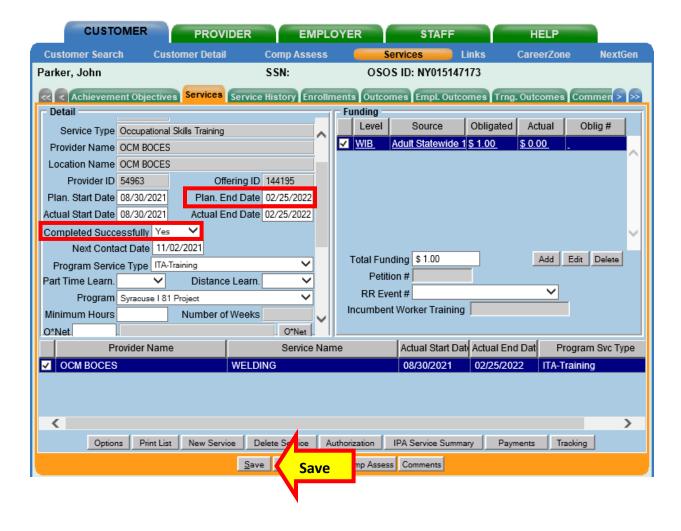
To close an open service, navigate to the **Customer** module, **Services** window, **Services** tab. Select the service that has ended and must be closed.





Enter the Actual End Date and select Completed Successfully (yes/no).

Click Save. The service is now closed.



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OUTCOMES

Employment and training outcomes for Syracuse I-81 grant participants must be recorded in the Employment Outcomes and Training Outcomes tabs of OSOS.

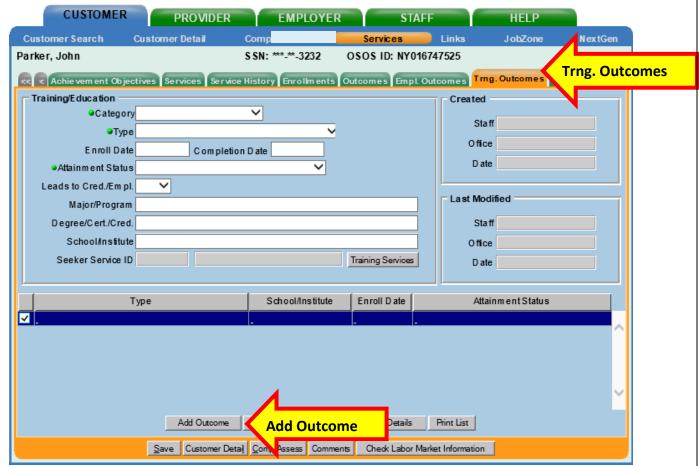


Please note that if a participant is served solely under this grant, they will only be counted in statewide performance measures. They will not be counted in local performance measures and information entered in these tabs will not impact local performance numbers. However, if the participant is co-enrolled in a WIOA program, they will be included in both local and statewide performance measures. In this case, all outcome information must be entered per the WIOA Performance Measures and Outcomes OSOS Guide.

TRAINING OUTCOMES

When a participant has successfully completed training, it must be noted in the **Trng. Outcomes** tab in the **Services** window.

Click the Add Outcome button at the bottom of the screen.



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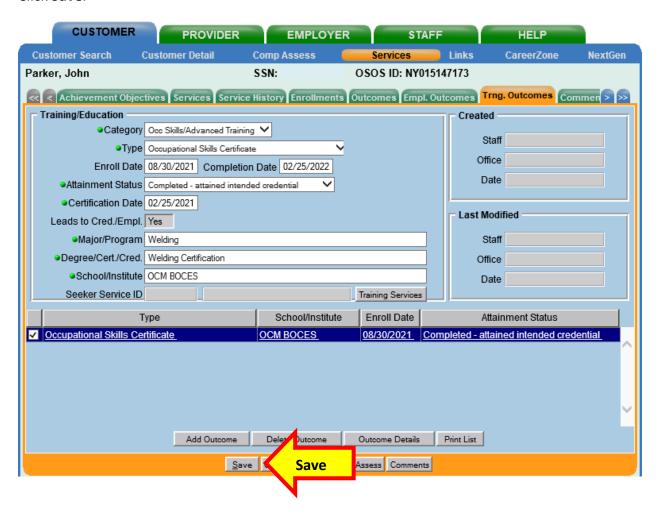
Enter the **Category** and **Type** of the Credential earned due to the completed training.

Enter the **Enroll Date** and the **Completion Date** of the training.

Enter the Attainment Status of "Completed - attained intended credential."

Enter the **Certification Date**, the **Major/ Program**, the **Degree/Certificate/Credential** obtained, and the **School/Institute** which granted that credential.

Click Save.

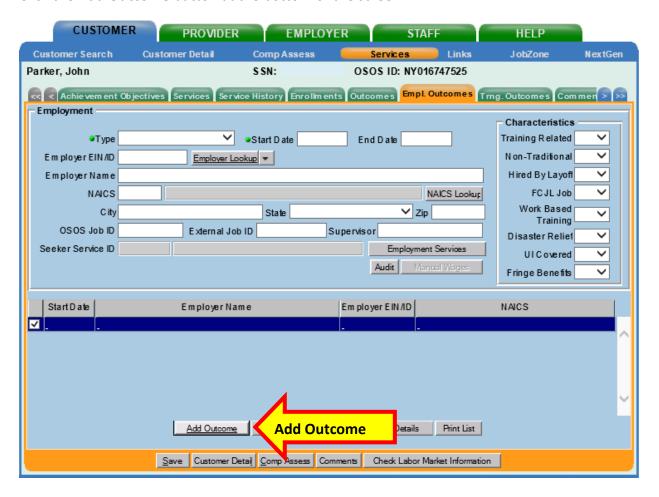




EMPLOYMENT OUTCOMES

When a participant obtains employment, this must be recorded in the **Empl. Outcomes** tab in the **Services** window of OSOS.

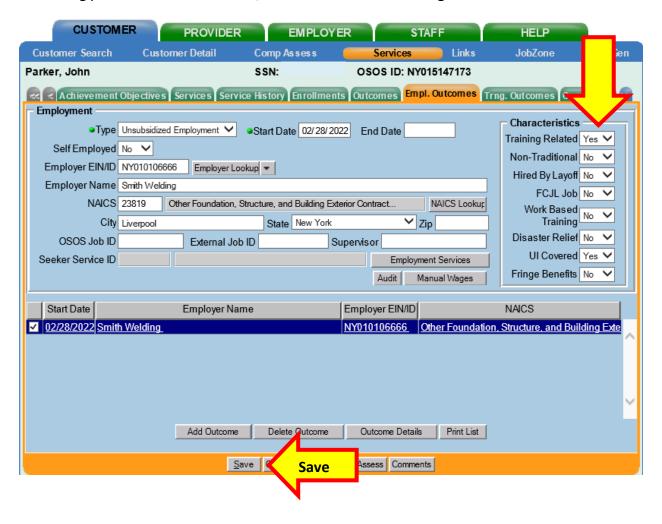
Click the **Add Outcome** button at the bottom of the screen.





Required fields in this tab are **Type** and **Start Date**, but you should enter as much information as is known about the employment.

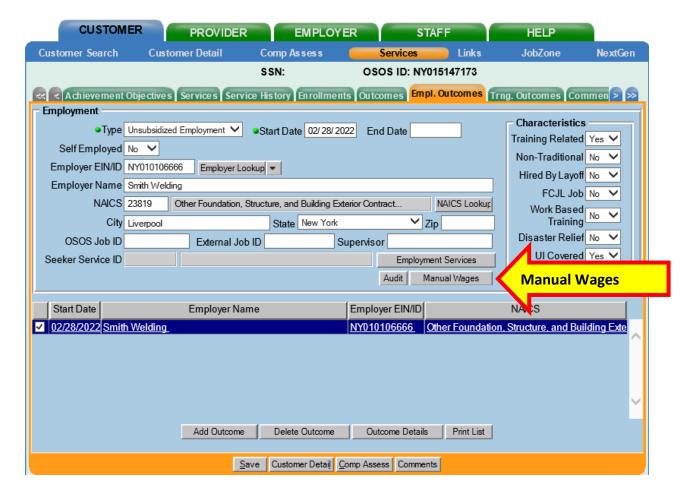
Please note the Characteristics section at the right of the screen. If the employment is related to training provided to the customer, remember to mark **Training Related** as **Yes**.





When the participant wages are known, they must be entered into OSOS.

Click the **Manual Wages** button in the Employment Outcomes tab.





This opens the Manual Wages webpage dialog.

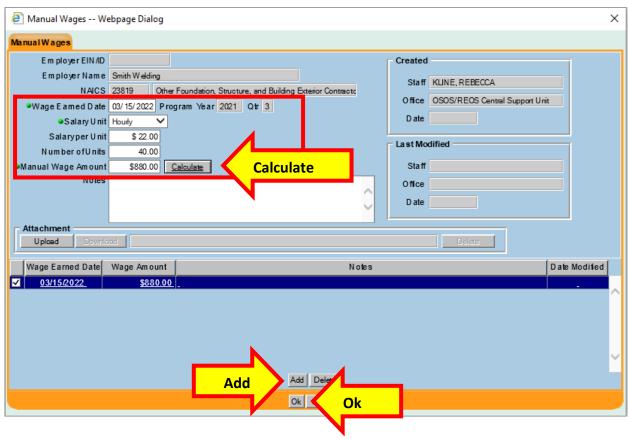
Click Add to open up the fields.

Enter the date of the paycheck or wage earned.

Enter the Salary Unit, the Salary per Unit, and the Number of Units.

Click the **Calculate** button.

Click the **OK** button.



Remember to click **Save** at the bottom of the screen.





RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found on the NYS Department of Labor's website.

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

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