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PURPOSE

The purpose of the Employment Recovery – National Dislocated Worker Grant (ER-NDWG) is to provide occupational training and career services to eligible participants who have been affected by COVID-19. Allowable program activities under the ER-NDWG include career services, training services, supportive services, and needs-related payments. Eligible participants include:

• Dislocated Workers as defined in Section 3(15) of the Workforce Innovation and Opportunities Act (WIOA)

• Workers laid-off as a result of a disaster, including:
  
  o workers who are laid off as a result of a quarantine, because they miss work to care for a family member, or because they cannot come to their regular workplace in order to follow social distance requirements; and
  
  o workers laid off after a business closure related to disruptions caused by a disaster and the efforts to contain it

• Self-employed individuals unemployed or underemployed because of a disaster

• Long-term unemployed individuals

These services, along with work-based training opportunities, will empower participants to re-enter to the workforce.

OSOS is a case management system designed to document services provided to jobseekers and businesses. Information entered 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 success in achieving the desired goals.

This guide will provide detailed instructions for completing the OSOS data entry necessary for the ER-NDWG. If you are a new OSOS user, please see the guide on Accessing the System for information regarding setting up an account, following confidentiality procedures, and performing the appropriate system setup.
PARTICIPANT DATA ENTRY

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 NYID number for any subsequent customer search. If no matches are found, you will need to create a new customer record in OSOS. Please see the Creating a Basic Customer Record OSOS Guide for detailed instructions for creating the customer record.

If a 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.
Navigate to the **Services** window, **Services** tab of the customer record. Click on the **New Service** button at the bottom of the screen.
After clicking on the New Service button, OSOS will automatically navigate to the Provider module. Within this module, OSOS will start in 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.

For OJT, Customized Training, or Career Services, provider information is manually added to OSOS. Classroom training must be listed on the Eligible Training Provider List (ETPL) as specified by the designation “ETPL Auto Load” in the Service Description.
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** and **Service Name** fields. You can also select the **Program** or **Service Type** from the corresponding drop down menu. Click **Search**.
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.
Select the appropriate offering and click the “Schedule” button at the bottom.
By clicking Schedule, the service will be added to the customer’s record, within the Services 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 actually 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 the O*Net Titles in OSOS Guide.

**Staff Assigned** – Click the “Change” button to enter the staff assigned to this participant. If you are the staff member assigned to this participant, you may choose the down arrow and select “Assign to Me.”

**WIB Assigned, Agency, Office** – These fields will auto load information already attached to the service. If the information is incorrect, click on the Change Office button to update.
Then click **Save** at the bottom of the screen.
ADD FUNDING

Next, complete the Funding section (right-hand side) for the service. To do this, first 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 grant.*
After clicking **Add**, a pop-up widow will appear with a list of funding sources. Check the box next to Employment Recovery- NDWG to select that funding source. Then, enter $1.00 in the **Obligated Amount** field and click **OK**.

<table>
<thead>
<tr>
<th>Level</th>
<th>Funding Source</th>
<th>Year</th>
<th>Remaining</th>
<th>NEG/Contract/Grant #</th>
</tr>
</thead>
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<tr>
<td>WIB</td>
<td>WIOA Adult Local</td>
<td>2018</td>
<td>$10000.00</td>
<td></td>
</tr>
<tr>
<td>WIB</td>
<td>WIOA Adult Local</td>
<td>2019</td>
<td>$9998.00</td>
<td></td>
</tr>
<tr>
<td>WIB</td>
<td>WIOA Dislocated Worker Local</td>
<td>2018</td>
<td>$9998.00</td>
<td></td>
</tr>
<tr>
<td>WIB</td>
<td>WIOA Dislocated Worker Local</td>
<td>2019</td>
<td>$9999.00</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td>Youth Statewide 15%</td>
<td>2018</td>
<td>$9990.00</td>
<td></td>
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<tr>
<td>State</td>
<td>Youth Statewide 15%</td>
<td>2019</td>
<td>$10000.00</td>
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<tr>
<td>State</td>
<td>Dislocated Worker Statewide 15%</td>
<td>2018</td>
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<td></td>
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<tr>
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<tr>
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<td>Adult Statewide 15%</td>
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<tr>
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<td>Opioid Crisis DWG</td>
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</tr>
</tbody>
</table>

**Obligated Amount** $1.00

**OR**

**Obligated Percentage** 100%
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 must 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 in the Customer module, Customer Detail window. The Comments -- Webpage Dialog box will appear. Enter the comment and click the Save button on the Webpage Dialog box. The comment will then appear listed on the Comments tab next to the date the comment was entered. Remember to save the entire customer record when you are finished entering comments, using the Save button at the bottom left of the screen.
ENTER OUTCOMES

When a customer begins a training program, staff must document information about the training in the Training Outcomes tab. Performance data is pulled from this tab, therefore it is important to update the customer’s training outcome details as they progress through their program. For more information on outcome data entry please see the WIOA Performance Measures and Outcomes Guide.
RESOURCES AND ASSISTANCE

Accessing the System

Creating a Basic Customer Record OSOS Guide

WIOA Performance Measures and Outcomes Guide

O*Net Titles in OSOS Guide

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