599 Data Entry
OSOS Guide
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BACKGROUND
The intent of Section 599 of the New York State Unemployment Insurance Law is to return the unemployed worker to the labor market with the necessary skills required to secure employment of a substantially equal or higher skill level than the customer’s past employment. Any public or private training designed to develop an occupational skill will be considered career and related training for the purposes of the 599 program.

The Career Center staff responsibility in this process includes helping the customer complete and submit the required application and supporting documentation to the 599 Central Unit. Staff are required to enter specific Activities and Comments in OSOS regarding the application process.

Each week a report of 599 Approvals, Disapprovals, and Terminations are emailed to specified local office contacts. Staff must enter the OSOS Training Service for all APPROVED applications. They must follow-up with all Original Claim Disapprovals and review the 599 Terminations to determine if the OSOS Training Service should be updated.

PURPOSE
This guide describes how to record 599 activities and comments and will demonstrate how to record an OSOS Training Service and attach the appropriate funding to the service. The guide will also provide instructions on how to end a service and the follow up that is required for specific customers.
OSOS DATA ENTRY

CUSTOMER DETAIL
Activities related to the 599 program are entered using the Activities and Comments tabs of the Customer Detail section.

ACTIVITIES TAB
To enter a 599 activity click the Activity button at the bottom of the screen.
This will open the **Activities – Webpage Dialog** box. Click on the category **L1 State Specific** folder to view the 599 folders. Click on the **599 One-Stop** subfolder to view the activities.

Click on the box next to the Activity you need to record. For assistance you can view the [OSOS 599 Activity Guide](#).

The date will default to the date you enter the activity, if you need to modify this field to reflect the appropriate date you may do so. The 599 Activity Guide states: "All staff must enter the Activity at the time of occurrence to accurately capture the date the Activity was performed. (In the rare exceptions when it is not possible to enter the OSOS 599 Activity on the same date it occurs, please be sure to change the “Activity Date” when entering the Activity from the default (current) date to the actual date the Activity was performed.)"
COMMENTS TAB

Comments are used to record case management notes. All users should post comments, details about activities, 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.

Certain Activities require a corresponding Comment. Information about entering 599 Activity-related case notes can be found online at: OSOS 599 Activity Guide
RECORDING AN OSOS TRAINING SERVICE FOR ALL 599 APPROVALS

599 WEEKLY REPORT
The 599 Weekly Reports will include the Customer's OSOS ID, Customer Name, Office, Determination Issued, Determination Date, and Activity Type.

For each APPROVED 599 Application the Career Center is responsible for recording the Training Service in the OSOS Services Module. Career Center staff must also conduct follow-up and provide appropriate services to applicants who receive a disapproval of their Original Claim application, or who were terminated from the 599 program.

The training service in OSOS will keep the program enrollments active while in training. Entering the training service will avoid premature program exits and negative performance outcomes.
VIEWING DOCUMENTS IN FAF
To enter the service into the customer's OSOS record you must first obtain the necessary information from the customer's 599 approval letter (form 316.M). The 316.1M approval letter will have all of the required information needed to enter the service.

Select and display the most recent 316.1M document in FAF. Print the form so you can easily refer to it throughout the process of entering the service.

To learn how to view documents in FAF refer to the Viewing Training Documents in FAF Procedures
IDENTIFYING THE FUNDING SOURCE
Before entering the training service on the customer's record, identify if the 599 approved training is WIA/WIOA funded.

Review the comments in OSOS to identify if the training is being funded with WIA/WIOA money. If the information is not found in the comments, then contact your Supervisor or local WIOA Training Coordinator to identify if the training is WIA/WIOA funded.

If the customer's training is WIA/WIOA funded follow the guidance for **ADDING A SERVICE THAT IS WIA/WIOA FUNDED.**

If the 599 approved training is not WIA/WIOA funded follow the guidance for **ADDING A SERVICE FOR NON-WIA/WIOA FUNDED TRAINING.** (Page 26)
ADDING A SERVICE THAT IS WIA/WIOA FUNDED

316.1M
Throughout the process of adding the service to the customer record you will need to refer to
the relevant 316.1M that is located in FAF.

When entering a WIA/WIOA funded service:

- The Training Facility field is used to identify the Provider.
- The Course of Study (Major) and the Degree (Certificate) to be Earned are used
to identify the service.
- The Start date will be used as the Actual Start and Planned Start Dates
  for Training.
- The Completion date will be used as the Planned End Date
- The O*Net code listed in the Occupational Goal Field will be used in the O*Net
  field in OSOS.
CUSTOMER SEARCH
To add a training service to a customer's OSOS record you must first be in their record. Enter the customer's OSOS ID number into the Customer ID field to bring up their record. Then click the Search button.
CUSTOMER DETAIL
Once you are in the customer’s record click the Services window.
SERVICES TAB
Next, click the Services tab. Then click the New Service button at the bottom of the screen to add the training service to the customer record.
OFFERING SEARCH
Clicking the New Service button will direct you to the Offering Search window. This is where you search and select the appropriate service to link to the customer. Click the General Info tab to bring up the search fields.

Quick Search is not used for the offering search when adding a service that is WIA/WIOA funded.
The WIB field automatically defaults to the area of the user. Enter the name or partial name of the training provider—found in the Training Facility field on the 316.1M form. If a provider is not in the user's area, adjust the WIB to the appropriate area. Click the **Search** button to view the results.
After clicking the Search button, review the search results.

To view the offering details check the box next to the Provider Name and click the Detail button to review the details of the offering.
REVIEW THE OFFERING
Review the Provider info for a WIA/WIOA funded service. The **Service Description** field should always read: ETP Auto Load. (ETP is the acronym for Eligible Training Provider.)

*If the service description does not have ETP Auto load do not choose this offering. Go back to the search results to identify the correct offering.*

To return back to the search results click the **Return to Search** button at the bottom of the screen.
SCHEDULE THE OFFERING

After the correct offering has been identified, click the Schedule button. This will return you to the customer's Services tab and the chosen service will be added to the lower part of the Services screen.
INITIAL SERVICE DATA ENTRY
Click the Service checkbox to activate the fields. The details from the Service provider will automatically populate in the Detail section.
The Actual Start Date, Planned End Date, Program Service Type, Part Time Learn, Distance Learn and O*Net fields MUST be entered in order to save the service. OSOS will not allow funding to be added to the service unless all of these fields are completed. Complete as follows:

- **Actual Start Date and Planned Start Date:**
  - If training has already started, enter the Start date from the 316.1M into the Actual Start Date field in OSOS and enter the same date in the Planned Start Date field.
  - If the customer's training will start in the future: Leave the Actual Start Date field blank. Enter the Start date from the 316.1M into the Planned Start Date in OSOS to indicate the anticipated training start date. Enter the same date in the Next Contact Date field, which will send a reminder to your Inbox. On that day enter the Actual Start Date, and then add the funding. (see FUNDING THE SERVICE pg. 22)

- **Planned End Date:** this date should reflect the anticipated date of the completion of the training. This date is located on the 316.1M in the Completion date field. (see 316.1 M screen shot on pg.9)

- **Program Service Type:** Select ITA-Training from the dropdown field. All classroom training is considered ITA for reporting purposes.

- **Part Time Learn & Distance Learn:** Select No for both fields from the dropdown field.

- **O*NET:** Enter the 8 digit O*Net code provided on the 316.1 M in the Occupational Goal field. If the O*Net code is not provided on the 316.1 M click the O*Net button and search for the correct O*Net title based on the title provided on the 316.1M.
NEXT CONTACT DATE
Enter a **Next Contact Date** 60 days prior to the **Planned End Date**. If the Planned End Date is less than 60 days in the future use the **Planned End Date** as the **Next Contact Date**.

60 Days Prior

When you receive an OSOS inbox reminder 60 days prior to the completion of training, contact the customer to determine if their **Planned End Date** is still accurate. **If it is**, offer job placement and career counseling services. Adjust the **Planned End Date** if the customer indicated it has changed. Document the conversation with the customer in OSOS. After this outreach has occurred enter the **Planned End Date** into the **Next Contact Date** field.

*If the customer indicates that the planned end date of their training has changed you must send an email to the 599 Central Review Unit, 599.dews@labor.ny.gov. In the email include the customer’s name, NY ID number and the updated planned end date. Document this in comments in OSOS.*

Confirm completion of Training

When you receive an OSOS inbox reminder on the customer's **Planned End Date** contact the customer to confirm they have completed training, end the service, and set up a one-on-one appointment to assist them with job placement and career counseling services.

Once all of these fields are complete click the **Save button**.
FUNDING THE SERVICE
Connecting funding to the service will trigger an extended enrollment. To fund a service, highlight the service at the bottom of the screen.

Enter $1 to the **Total Funding** field. Click the **Add** button.
SELECT THE FUNDING SOURCE
The **Funding - Webpage Dialog** box will appear showing funding sources in OSOS.

The funding window displays the list of available funding options. Select **WIB Level WIA Adult Local** if the funding is from WIA/WIOA adult funds. Select **WIB Level WIA Dislocated Worker Local** if the funding is from WIA/WIOA Dislocated worker funds.

To determine what funding source to select, review the comments in the customer’s OSOS record or contact your Supervisor or local WIOA Training coordinator.

Add $1 to the **Obligated Amount** then click **OK**.

If no funding appears or the appropriate funding is missing, check that WIA/WIOA eligibility data has been entered, such as the Date of Birth, Gender, or Selective Service into Customer Detail, or other WIA/WIOA eligibility barriers into the Comprehensive Assessment module.
Once the service has been funded, click the **Save** button.
The **Verification - Webpage Dialog** box may appear if the service creates a new enrollment. Verify the customer's information, make any changes and click **OK to create the enrollment**.

![Verification - Webpage Dialog](image)

**Entering a training service requires compliance with all Customer Service Indicators (CSI).**
ADDING A SERVICE FOR NON-WIA/WIOA FUNDED 599 TRAINING

316.1M
Throughout the process of adding the service to the customer record you will need to refer to the 316.1M that you identified in FAF.

When entering a Non-WIA/WIOA service:

- The Completion date field is used to identify the Planned End Date.
- The O*Net code listed in the Occupational Goal Field will be used in the O*Net field.

### CONDITIONAL TRAINING APPROVAL
Under Section 599 of NY Unemployment Insurance Law

The following training program has been approved by the Department of Labor under Section 599 of the Unemployment Insurance Law. Please review this training information carefully and advise the DEWS 599 Central Review Unit immediately if there are any inaccuracies. Failure to do so may result in a loss of benefits.

<table>
<thead>
<tr>
<th>Training Facility:</th>
<th>SUNY University at Buffalo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course of Study (Major):</td>
<td>Accounting</td>
</tr>
<tr>
<td>Start date:</td>
<td>01/08/2016</td>
</tr>
<tr>
<td>Completion date:</td>
<td>12/21/2017</td>
</tr>
<tr>
<td>Degree (Certificate to be Earned):</td>
<td>Associates</td>
</tr>
<tr>
<td>Number of Class Hours:</td>
<td>32</td>
</tr>
<tr>
<td>Number of Credit Hours:</td>
<td>12.0</td>
</tr>
<tr>
<td>Occupational Goal:</td>
<td>Accounting Clerk 43-3031.09</td>
</tr>
<tr>
<td>599 Approval Date:</td>
<td>02/11/2016</td>
</tr>
</tbody>
</table>

Please note that you must have the attached verification form on page 3 completed by your training facility and returned to the above address or faxed to (518) 457-9492 no later than ten (10) days from the mailing of this notice. If the verification is not received, this training approval will be terminated which may adversely affect your rights to receive unemployment insurance.

**Note for Faxes:** This letter is designed for electronic handling through a FAX server. Therefore, you must send the “Third Page” of this inquiry as the first page of your fax, with any “cover” page or attachments following. The fax number provided should only be used to respond to this inquiry and not for any other correspondence to the Department of Labor.

**PLEASE SEE IMPORTANT INFORMATION ON SECOND PAGE**

For the Commissioner of Labor,
By: The DEWS 599 Central Review Unit

NYS 10-13 TCC316.1 CONDITIONAL NYS
CUSTOMER SEARCH
To add a training service to a customer's OSOS record you must first be in their record. Enter the customer's OSOS ID number into the Customer ID field to bring up their record. Then click the Search button.
CUSTOMER DETAIL

Once you are in the customer’s record click the Services Window.
SERVICES TAB
Next, click the Services tab. Then click the New Service button at the bottom of the screen to add the training service to the customer record.
OFFERING SEARCH
Clicking the **New Service** button will direct you to the **Offering Search** window. Using the 316.1M training approval, identify the customers course of study and categorize their training as Occupational Skills training, ESL training, or Basic Skills training. Enter the corresponding Offering ID from the list below into the Quick Search Field. Click the **Search button**.

**Occupational Skills Training-Non-DOL uses offering ID 84332** (most 599 approvals are for Occupational Skills Training). Occupational Skills training is an organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate or advanced levels.

**ESL-non-DOL (English as Second Language) uses offering ID 84333.** ESL is a program of instruction designed to help individuals of limited English proficiency achieve competence in the English language in the following six skill sets - reading, writing, listening and speaking, as well as in functional and workplace skills

**Basic Skills-non-DOL (GED/TASC) uses offering ID 84334.** Basic Skills is a program or course designed to develop the ability to compute or solve problems, read, write or speak English above the eighth grade level, as measured on a standardized or criterion-referenced test, or at a level necessary to function on the job, in the individual’s family or in society.
This will direct you to the Offering Detail page. Click the **Return to Search** button to schedule the offering.
Click the **Schedule** button.
INITIAL SERVICE DATA ENTRY
Click the Service checkbox to activate the data fields. The details from the Service provider will automatically populate in the Detail section.
The Actual Start Date, Planned End Date, Program Service Type, Part Time Learn, Distance Learn and O*Net fields MUST be entered in order to save the service. Complete as follows:

- **Actual Start Date**: is the approved determination date. This date will be located on the 599 Weekly Reports in the field labeled Determination date. Do not back date to the customer's start date from the 599 application.
- **The Planned Start Date will be the same date as the Actual Start Date**
- **Planned End Date**: this date should reflect the anticipated date of the completion of the training. This date is located on the 316.1M in the Completion date field. (see 316.1 M screen shot)
- **Program Service Type**: Select ITA-Training from the dropdown field. All classroom training is designated as ITA for reporting purposes.
- **Part Time Learn & Distance Learn**: Select No for both fields from the dropdown field.
- **O*NET**: Enter the 8 digit O*Net code provided on the 316.1M in the Occupational Goal field. If the O*Net code is not provided on the 316.1 M click the O*Net button and search for the correct O*Net title based on the title provided on the 316.1M

**OSOS will not allow funding to be added to the service unless all of these fields are completed.**
NEXT CONTACT DATE
Enter a Next Contact Date 60 days prior to the Planned End Date. If the Planned End Date is less than 60 days in the future use the Planned End Date as the Next Contact Date.

60 Days Prior

When you receive an OSOS inbox reminder 60 days prior to the completion of training, contact the customer to determine if their Planned End Date is still accurate. If it is, offer job placement and career counseling services. Adjust the Planned End Date if the customer indicated it has changed. Document the conversation with the customer in OSOS. After this outreach has occurred enter the Planned End Date into the Next Contact Date field.

If the customer indicates that the planned end date of their training has changed you must send an email to the 599 Central Review Unit, 599.dews@labor.ny.gov. In the email include the customer’s name, NY ID number and the updated planned end date. Document this in comments in OSOS.

Confirm completion of Training

When you receive an OSOS inbox reminder on the customer's Planned End Date contact the customer to confirm they have completed training, end the service, and set up a one-on one appointment to assist them with job placement and career counseling services.

Once all of these fields are complete click on the Save button.
FUNDING THE SERVICE
Connecting funding to the service will trigger an extended enrollment. To fund a service, highlight the appropriate service by marking the checkbox.

Enter $0 to the **Total Funding** field. Click the **Add** button.
SELECT THE FUNDING SOURCE

The **Funding - Webpage Dialog** box will appear showing funding sources in OSOS. The funding window displays the list of available funding options. Select **WIB Level WIA Adult Local**

Add $0 to the **Obligated Amount** then click **OK**.
Once the service has been funded, click the **Save** button.
The **Verification - Webpage Dialog** box may appear if the service creates a new enrollment. Verify the customer's information, make any changes and click **OK to create the enrollment**.
ENDING A SERVICE
To show a service has ended, select the service and add the Actual End Date. Choose Yes or No from the Completed Successfully drop-down field.

Choose Yes from the Completed Successfully drop-down field if the customer confirms that they have successfully completed their training and enter the Actual End Date confirmed by the customer.

Choose No from the Completed Successfully drop-down field if the customer indicates they are no longer enrolled and did not complete their approved training program. Enter the Actual End Date as the date the customer confirmed they are no longer in training.

After entering the Actual end date and selecting an outcome for the completed successfully field click Save.

All services must have Actual End Dates, or the enrollment cannot close. The Actual End Date cannot be entered prior to the calendar date.
ENDING THE SERVICE FOR 599 TERMINATIONS:
For customers listed on the 599 Weekly Report with the activity type **Termination** and their training service was entered into OSOS: Choose **No** from the **Completed Successfully** drop-down field. Enter the **Actual End Date** as the Determination Date listed on the 599 Weekly Report.
FOLLOW UP

Disapprovals: Original Claim (OC) customers whose 599 applications were disapproved must be called in for a follow up service to work on their 599 application. You can identify the OC Disapproved applicants from the 599 Weekly Reports. In the column labeled Determination Issued the "599CRU Disapproval of Original Claim" activity will be listed.

- Access the customer's disapproval letter in FAF. The disapproval letter will be labeled as the 316.2, and will describe why the customer's training was disapproved. Review this before contacting the customer.

SECTION 599 TRAINING DISAPPROVAL

Your request for approval of occupational training under Section 599 of the New York State Unemployment Insurance Law has been reviewed. After considering all relevant factors, we cannot approve your training in Criminal Justice at Westchester Community College because:

☐ Employment opportunities for which you are fitted by training and experience are not substantially impaired.

☐ Your training will require more than 24 months to complete.

☐ Reasonable opportunities for employment in the occupation or skill for which you have requested training are not expected to be available in the state in the immediate future.

☐ You are enrolled in less than 12 credits or hours of classroom instruction per week.

☐ Your training does not clearly lead to the qualifications or skills for a specific occupation.

☐ Your training will not upgrade your existing work skills or lead to more regular long-term employment.

☐ Your training is not being offered by a competent and reliable institution.

☐ You do not possess the required qualifications and aptitude to complete the training successfully.

☐ There is no evidence that your training meets the eligibility criteria for approval under Section 599.

REASON:

Your request for approval under Section 599 of the NYS Unemployment Insurance Law cannot be granted because your eligibility under this special provision cannot be determined due to incomplete, vague or missing information. Although you were asked to provide additional details of your program including your anticipated completion date and occupational goal in order to determine if your training meets the eligibility criteria for approval, you failed to provide the requested details by the deadline provided of 430pm on 1/6/16. Any information you provide after the mail date of this decision notice will be considered a new application.

You must be ready, willing and able to work full time as well as actively seeking work in order to maintain your unemployment insurance eligibility. You are required to keep a written record of your job search efforts.

☐ This determination notice replaces the one previously sent, dated .

☐ If you want a hearing on this new determination, you must request it.

For the Commissioner of Labor,

By: The DEWS 599 Central Review Unit

IMPORTANT – PROTECT YOUR RIGHTS
READ THE INFORMATION ON THE FOLLOWING PAGE
• Contact the customer
  o Work with the customer to work on their 599 application, if the specific disapproved criteria can be changed and will result in the application being approvable, resubmit the application.
  o The customer may have questions regarding their disapproval. You should be able to answer questions they have.
  o Provide reemployment services and give the Availability Advisory.
• Record the "599OS F/U with clamant on OC Disapproval."
  o Add comments to the customer's record. Refer to the OSOS 599 Activity Guide for assistance.

Terminations: Identify the customers whose 599 applications have been terminated. On the 599 Weekly Report in the Activity Column Termination will be listed.

• Access the customer's termination letter in FAF. The termination letter will be labeled as the 316.3M.
- Contact the customer: provide reemployment services and give the Availability Advisory.
- If the training service was entered into this customer's account, end the service appropriately. (See Ending the Service for 599 Terminations, above)

**RESOURCES AND ASSISTANCE**
Additional program information, OSOS guides and other resources can be found at: [http://labor.ny.gov/workforcenypartners/osos.shtm](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