

Attachments Tab OSOS Guide



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PURPOSE

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 regarding the use of the Attachments tab in OSOS. It will list which documents staff may upload into the Attachments tab, detail the settings necessary for browser compatibility with the Attachments tab, and provide instructions for attachment upload.



ATTACHMENT TAB POLICIES

The Attachments tab in OSOS provides a method for staff to attach certain relevant documents to the OSOS record for their Adult and Dislocated Worker customers. At this time, the Attachments tab will not be used for uploading documents by the WIOA Title 1 Youth program. NYSDOL is exploring the possibility of use by youth providers and will provide further clarification when a determination is made. For now, youth providers must continue to maintain hard files for their youth participants as required.

The documents listed below are the only documents that may be uploaded into the Attachments tab.

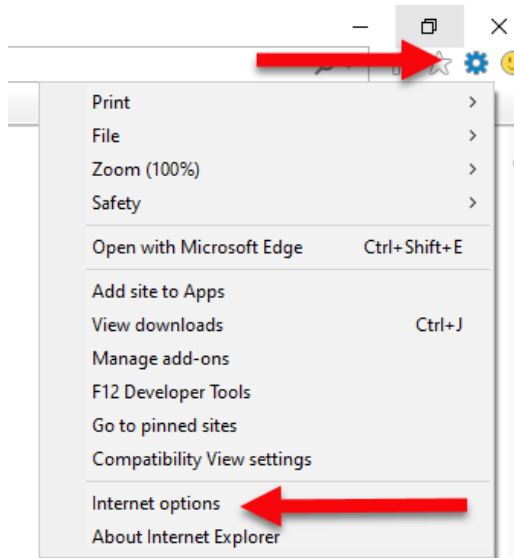
- **RESEA Program Documents, including the Eligibility Questionnaire and Re-Employment Plan**
- **WIOA Release of Information form**
- **Signed Equal Opportunity is the Law, Civil Rights and Grievance Procedures documents**
- **Documents to validate date of birth:**
 - State-issued photo ID
 - Birth certificate
- **DD214 to validate veteran status**
- **Documents related to training:**
 - Proof of training credential / MSG, including diploma, certificate, license, school transcript
 - On-the-Job Training or Customized Training contracts



Staff must never upload information related to medical history / status or legal issues into the Attachments tab. Only information directly related to a customer's employment and training needs may be housed in OSOS.

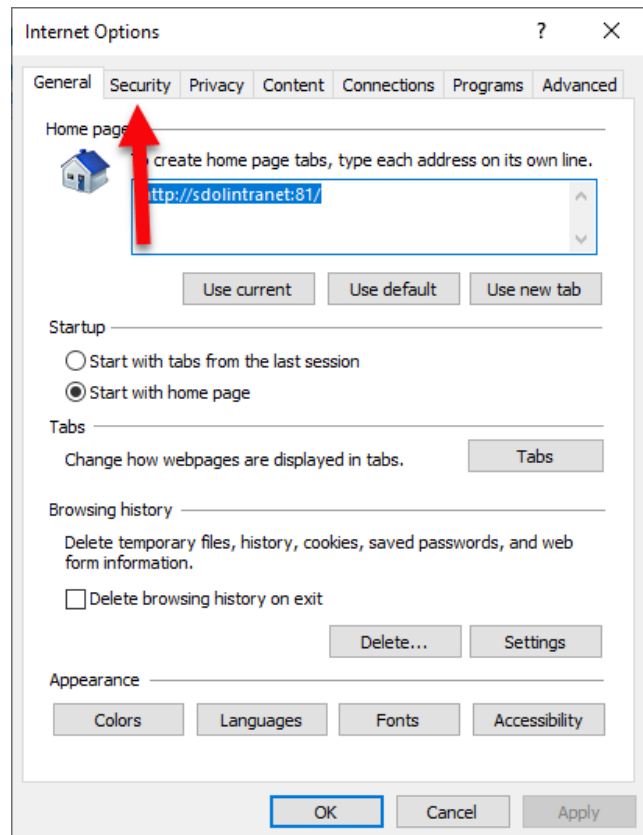
BROWSER SETTINGS

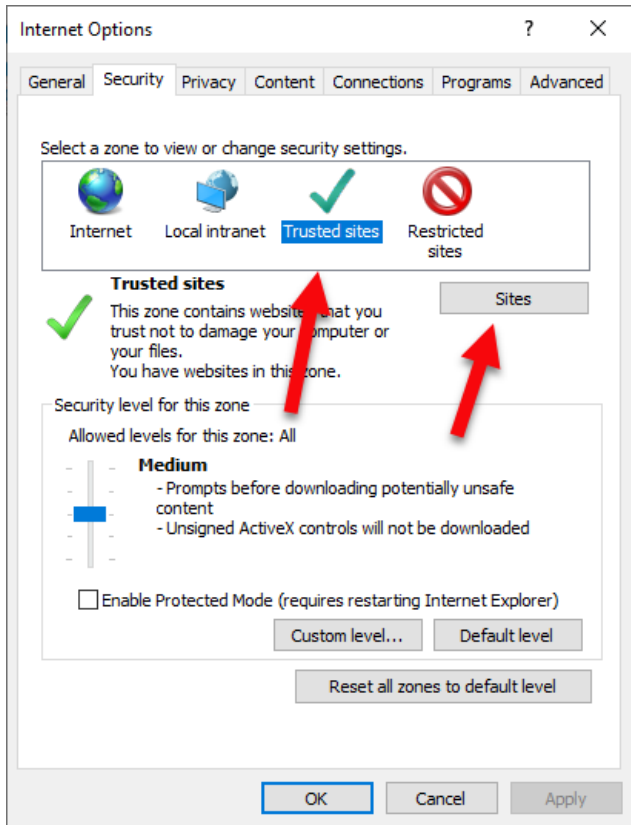
Before using the Attachments tab in OSOS, staff must first check their Internet Explorer settings and make any necessary updates.



To begin, click on the gear icon at the top of Internet Explorer and select **Internet Options**.

Select the **Security** tab.





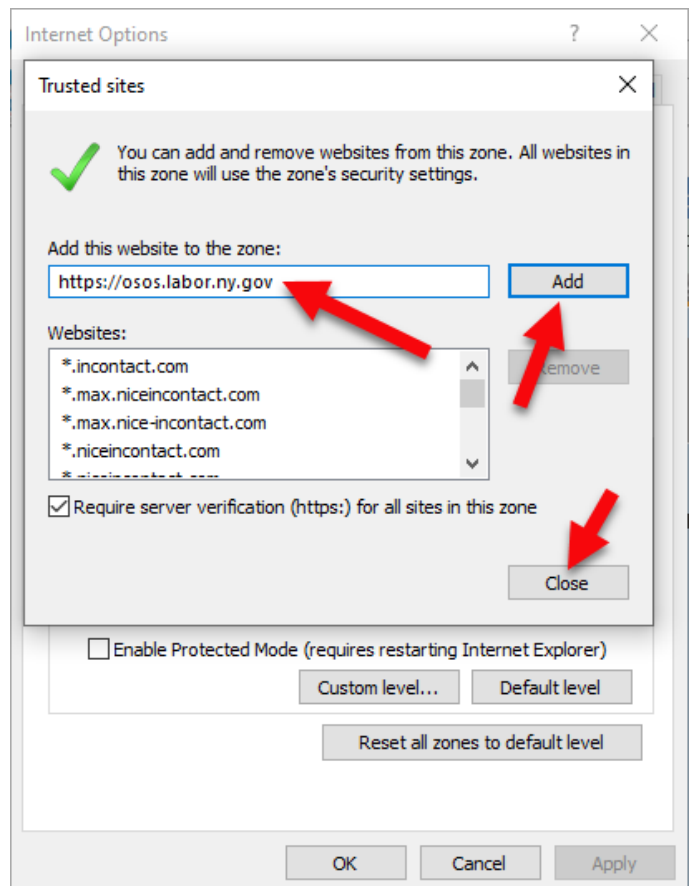
Click the green checkmark for Trusted Sites.

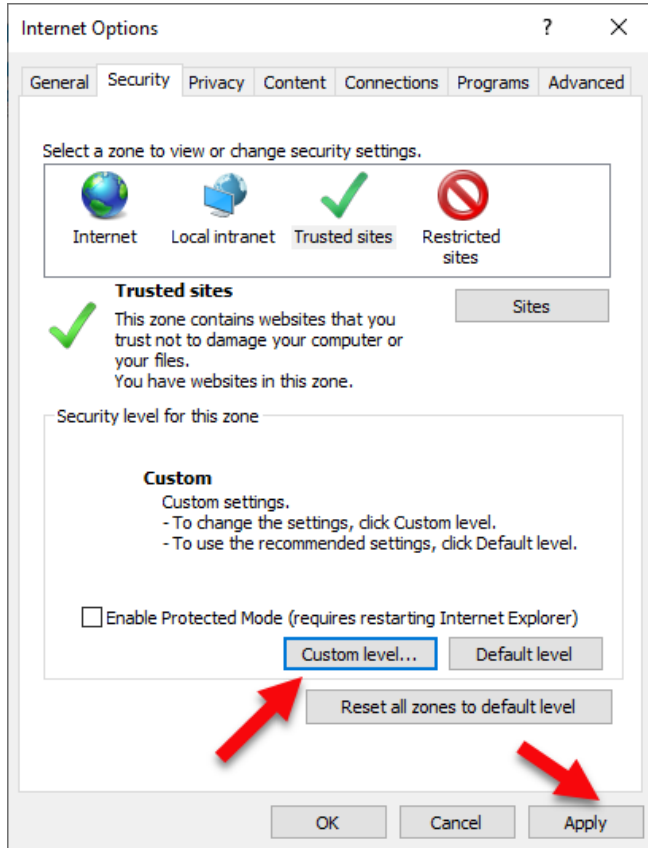
Then click **Sites**.

Add the address <https://osos.labor.ny.gov>.

Click **Add**.

Click **Close**.

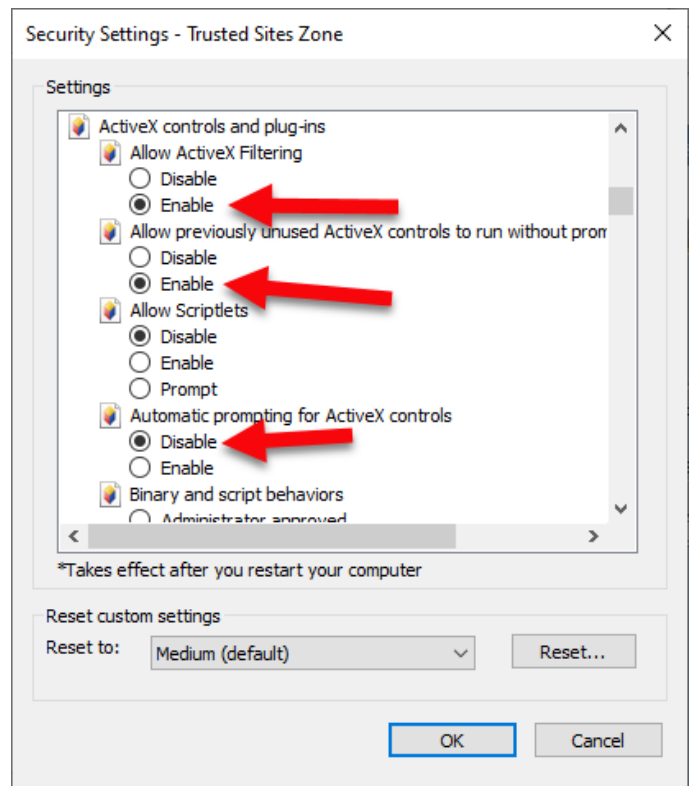


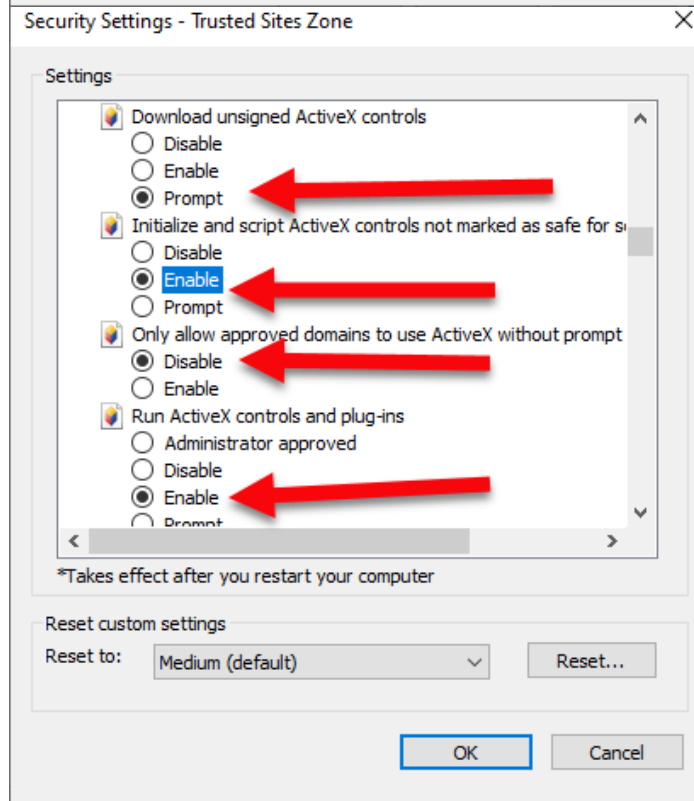
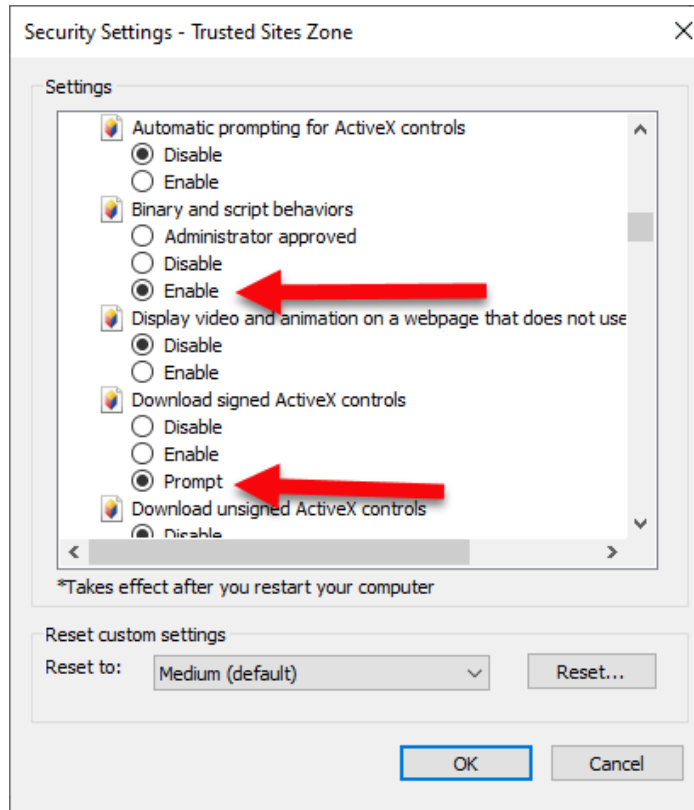


Click **Apply**.

Then, still in the Security tab, click **Custom Level**.

Adjust your ActiveX settings to the options indicated by the red arrows in the screenshots.





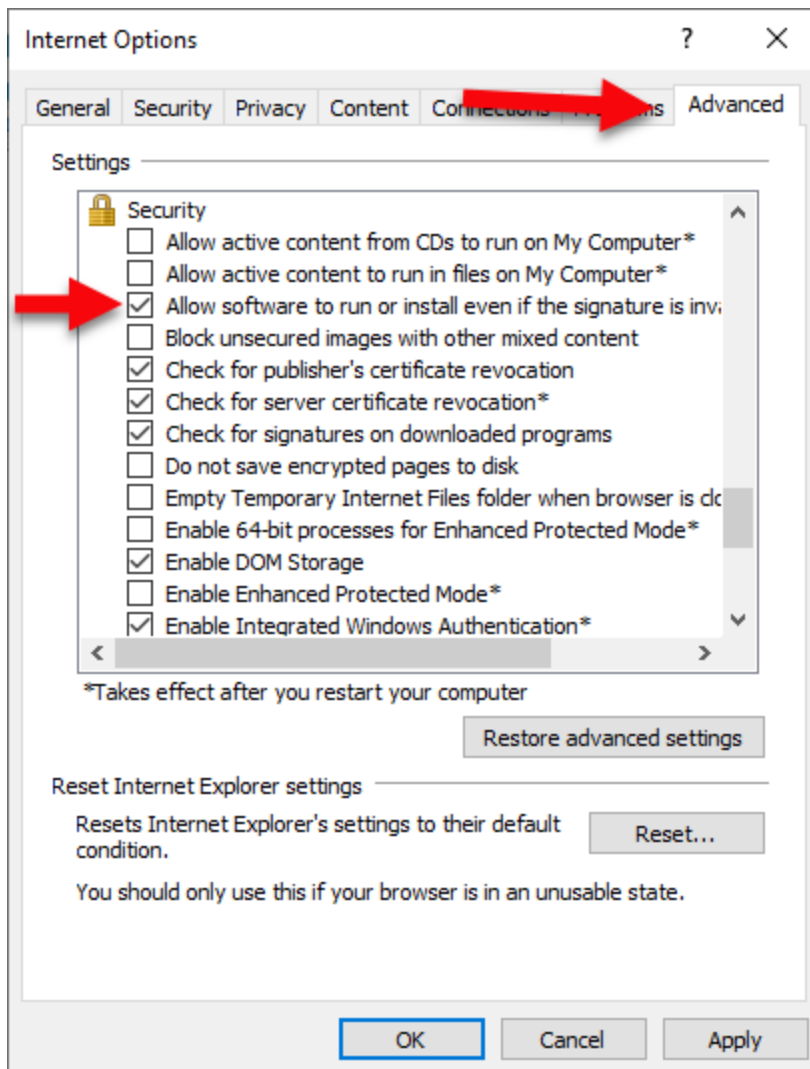
Click **OK**.

Then click **Apply** on the next screen.

Click on the Advanced tab. Scroll to the Security section and select "Allow Software to run or install even if the signature is invalid."

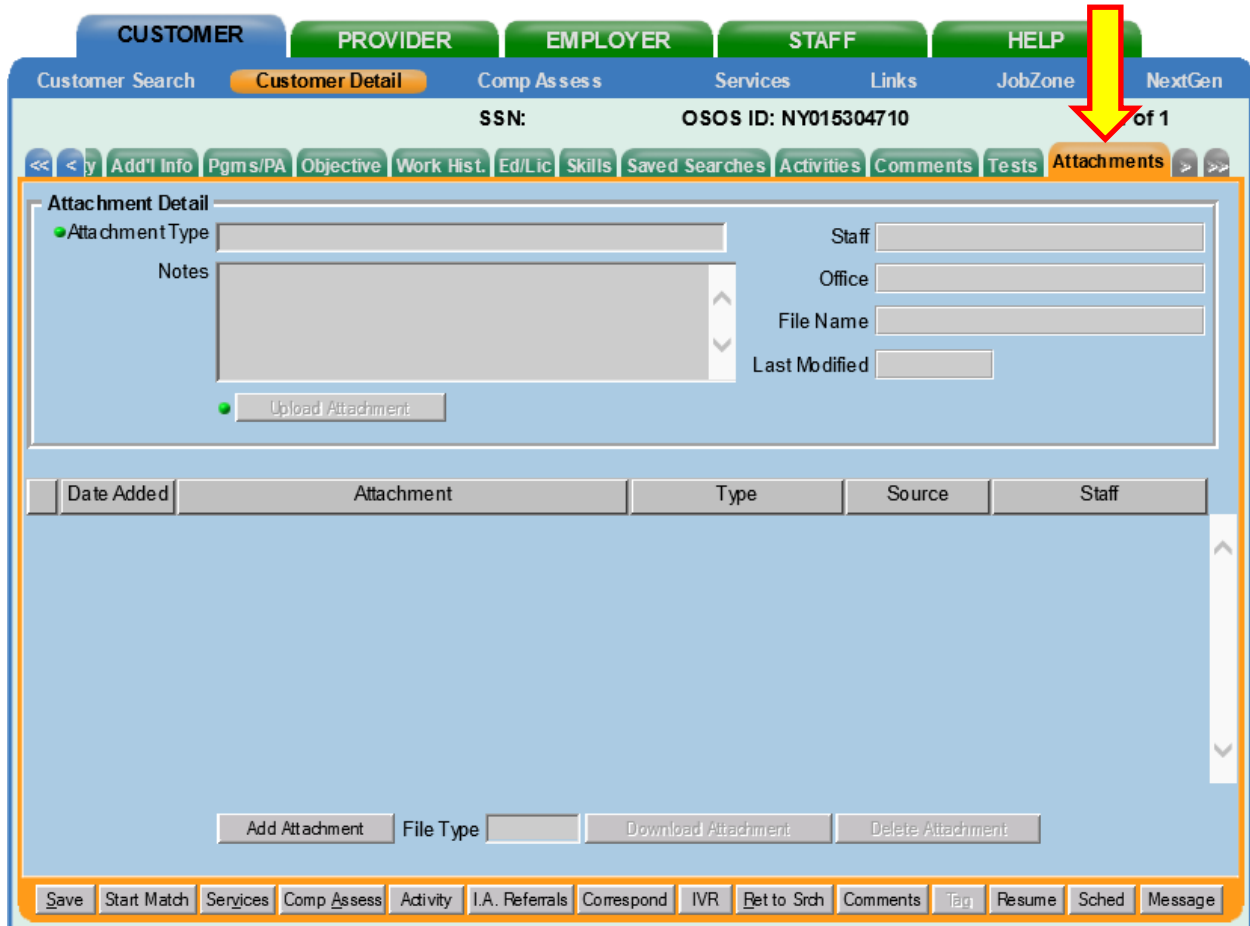
Click **Apply**

Then click **OK**.



UPLOADING ATTACHMENTS IN OSOS

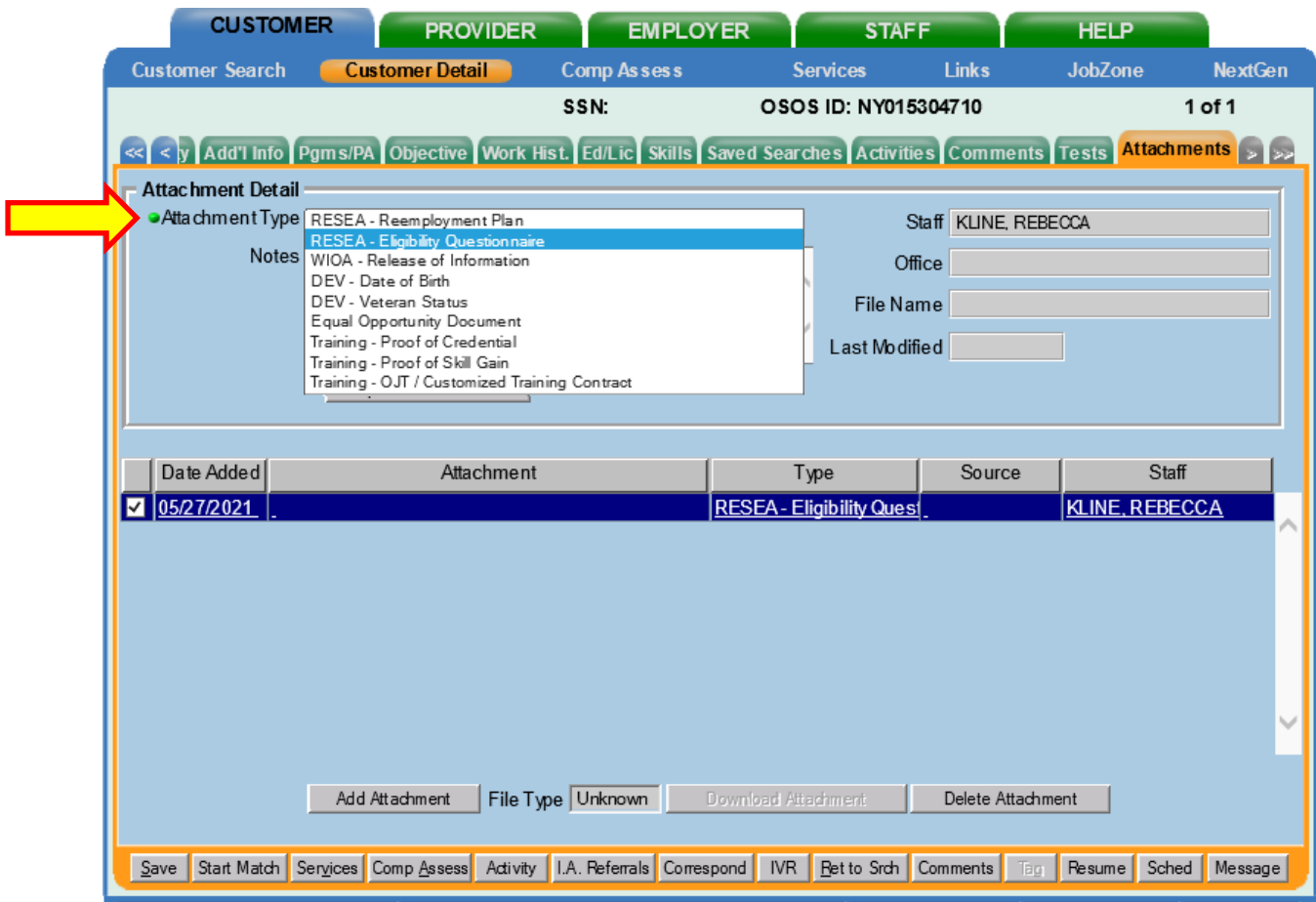
The **Attachments** tab is located in the **Customer** module, **Customer Detail** window of OSOS.



The screenshot shows the OSOS Customer Detail window. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, a secondary navigation bar contains links for Customer Search, Customer Detail (selected), Comp Assess, Services, Links, JobZone, and NextGen. The main content area displays the SSN and OSOS ID (NY015304710). A row of tabs includes Add'l Info, Pgms/PA, Objective, Work Hist., Ed/Lic, Skills, Saved Searches, Activities, Comments, Tests, and Attachments (highlighted with a red arrow). The Attachments section contains an 'Attachment Detail' form with fields for Attachment Type, Notes, Staff, Office, File Name, and Last Modified, along with an 'Upload Attachment' button. Below the form is a table with columns: Date Added, Attachment, Type, Source, and Staff. At the bottom of the Attachments section are buttons for 'Add Attachment', 'File Type', 'Download Attachment', and 'Delete Attachment'. The footer of the window contains a row of buttons: Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.

After selecting the Attachments tab, click the **Add Attachment** button.

Select the type of document you are uploading from the **Attachment Type** dropdown menu.

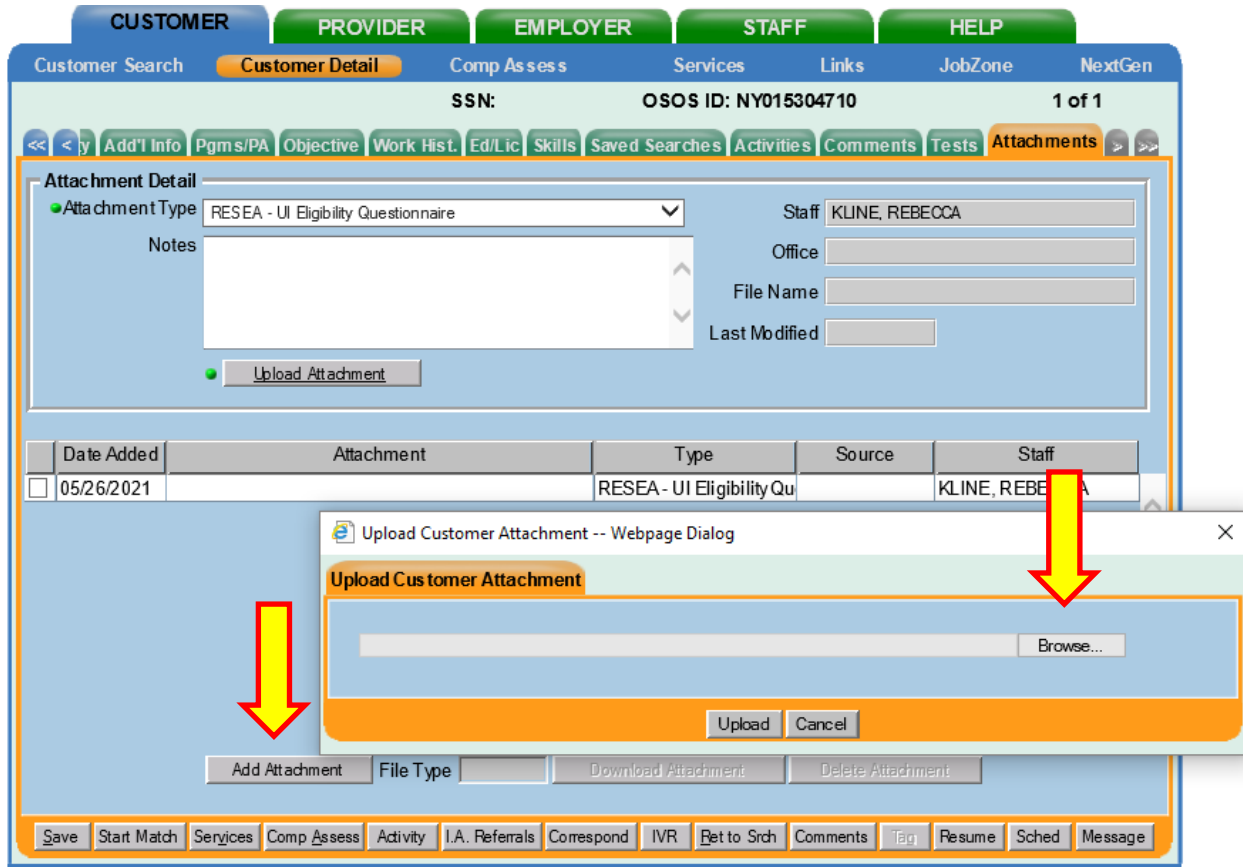



Remember, you cannot upload any document that has not been [listed in this guide](#). If you are trying to upload a document that is not listed in the dropdown menu, you should not upload it.

After selecting the Attachment Type, click the **Upload Attachment** button.

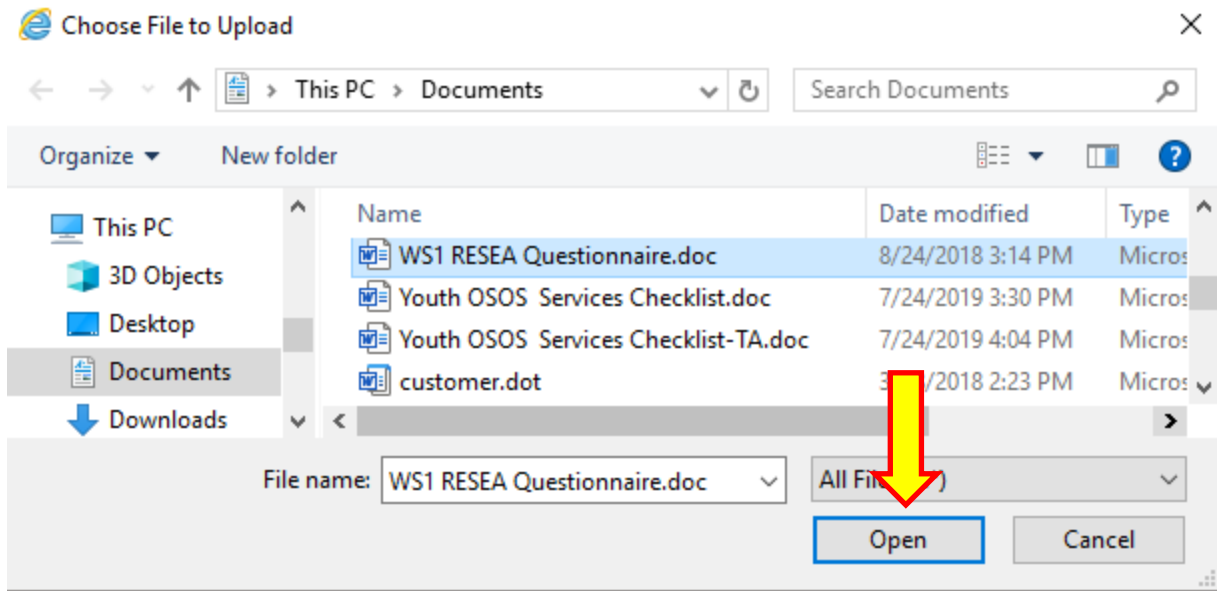
This will bring up the **Upload Customer Attachment** webpage dialog.

Click the **Browse** button.



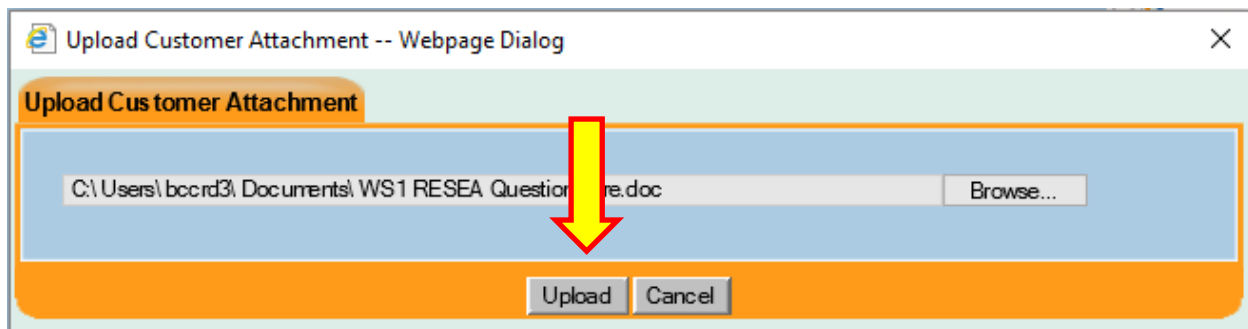
Select the document to upload from your desktop.

Click **Open**.



The file name is now displayed in the Upload Customer Attachment box.

Click the **Upload** button.





Now the document is attached to the OSOS record.

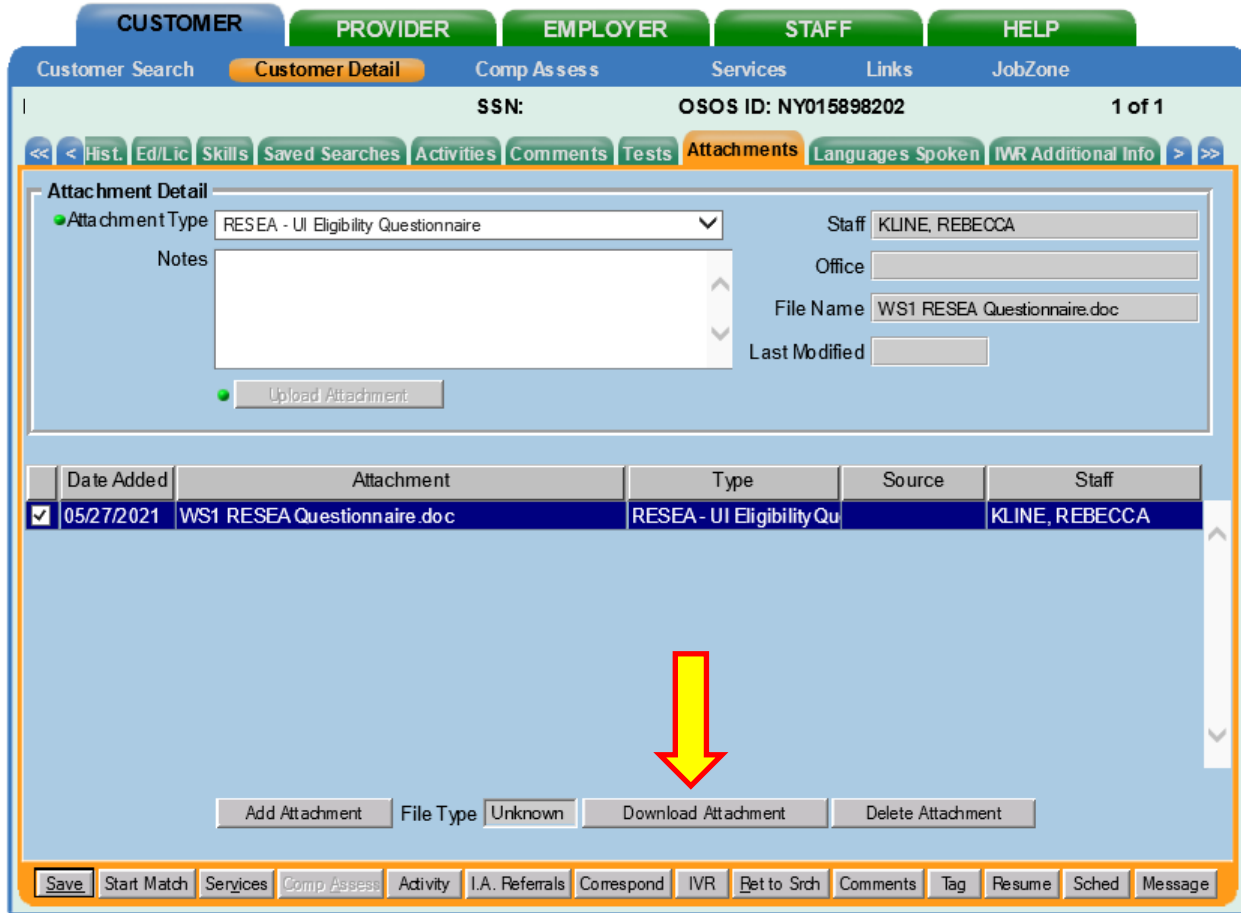
Click the **Save** button at the bottom of the screen immediately, before uploading another document.

The screenshot shows the OSOS interface with the 'Attachments' tab selected. The top navigation bar includes 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. Below this, there are tabs for 'Customer Search', 'Customer Detail', 'Comp As ses s', 'Services', 'Links', and 'JobZone'. The main content area displays the 'Attachment Detail' for a document named 'WS1 RESEA Questionnaire.doc'. The 'Attachment Type' is 'RESEA - UI Eligibility Questionnaire', and the staff member is 'KLINE, REBECCA'. There is a 'Notes' field and an 'Upload Attachment' button. Below the form is a table of attachments:

Date Added	Attachment	Type	Source	Staff
05/27/2021	WS1 RESEA Questionnaire.doc	RESEA - UI Eligibility Qu		KLINE, REBECCA

At the bottom of the screen, there is a 'Save' button highlighted with a red arrow, along with other buttons like 'Start Match', 'Services', 'Comp As ses s', 'Activity', 'I.A. Referrals', 'Correspond', 'IVR', 'Bet to Srch', 'Comments', 'Tag', 'Resume', 'Schd', and 'Message'.

To download an attached document, select the document and click the **Download Attachment** button at the bottom of the screen.



The screenshot shows the OSOS interface with the 'Attachments' tab selected. The document 'WS1 RESEA Questionnaire.doc' is listed in a table. A yellow arrow points to the 'Download Attachment' button at the bottom of the screen.

Date Added	Attachment	Type	Source	Staff
05/27/2021	WS1 RESEA Questionnaire.doc	RESEA - UI Eligibility Qu		KLIN, REBECCA



Requests to delete an uploaded document must be submitted to the OSOS Help Desk at help.osos@labor.ny.gov by a supervisor or manager.



RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found at:

<http://labor.ny.gov/workforcenypartners/osos.shtm>

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

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