WIOA Summer Youth Employment Program (WIOA-SYEP) OSOS Guide
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PURPOSE

New York State Department of Labor (NYSDOL) is partnering with the Office of Temporary and Disability Services (OTDA) to enhance and expand the Summer Youth Employment Program (SYEP). This effort is one part of Governor Cuomo’s first-in-the-nation gun violence disaster emergency and comprehensive strategy to build a safer New York. This initiative treats gun violence as a public health crisis and includes short term solutions as well as long term strategies that focus on community-based intervention and prevention strategies to break the cycle of violence. The WIOA-funded SYEP provides OTDA with additional WIOA funding in 22 areas of the state identified as having higher rates of gun violence. Eligible participants for the WIOA-funded SYEP shall be youth ages 14 to 24 who reside in one of the identified areas. The WIOA-funded SYEP will provide youth from low-income households with employment opportunities.

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 Expanded Summer Youth Employment Program.
SEARCHING FOR THE CUSTOMER

The first time 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.

<table>
<thead>
<tr>
<th>Customer Name</th>
<th>OSOS ID</th>
<th>DOB</th>
<th>Status</th>
<th>Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schenectady</td>
<td>015258310</td>
<td>01/01/15</td>
<td>Active</td>
<td>Schenectady County Career Center</td>
</tr>
<tr>
<td>Schenectady</td>
<td>015298309</td>
<td>01/01/15</td>
<td>Active</td>
<td>Schenectady County Career Center</td>
</tr>
<tr>
<td>Schenectady</td>
<td>015298322</td>
<td>01/01/15</td>
<td>Active</td>
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<td>01/01/15</td>
<td>Active</td>
<td>Schenectady County Career Center</td>
</tr>
<tr>
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<td>015298320</td>
<td>01/01/15</td>
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<td>015298307</td>
<td>01/01/15</td>
<td>Active</td>
<td>Schenectady County Career Center</td>
</tr>
</tbody>
</table>

**Select All**

**Detail**
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.
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 [Performing a Customer Search OSOS Guide](#).

For detailed information on creating a customer record, please see the [Creating a Basic Customer Record OSOS Guide](#).
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. 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.

_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._

**BASIC CUSTOMER RECORD DETAILS**

For detailed instructions on creating a basic customer record, please see the [Creating a Basic Customer Record OSOS Guide](#).

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. Under this initiative, it is required to collect SSN from the participant and data enter it in OSOS.
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. NYSDOL is required to collect this information under the Workforce Innovation and Opportunity Act (WIOA) as a part of our federal reporting.
**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 Lvl** set to **JobZone** will not use these fields for JobZone access. All **Portfolio Lvl**s 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.

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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

**Selective Service**: All males over the age of 18 must be registered with Selective Service and this information must be recorded. Select the check box and enter the participant's Selective Service number. If the participant does not know their Selective Service number, click on **Register/Lookup**. This opens the Selective Service System website in a new browser tab. Use this site to conduct online verification of selective service registration using the participant's last name, SSN and date of birth.
Programs / PA Tab

This tab does not contain any required information. However, since participants in this program are TANF recipients, you can enter this information here. Select the type of public assistance using 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 summer youth employment. Check the box next to the job title. Then click **Select**.
Work History Tab

Select **New Job Entry** to add the summer youth employment as a new work history entry for the youth. Fill in all the required fields with the information from the youth's SYEP job.
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**.

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 a 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 in the WIOA Youth program. However, for the purposes of the WIOA Summer Youth Employment Program, providers should only enter information that is known. If the information is unknown, please select Not Disclosed.

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.

**Employment Tab**

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

Transportation Tab - License Information is populated from the Ed/Lic tab under the Customer Detail window. Check any boxes that apply and record relevant comments related to work restrictions or job search restrictions in the Customer Detail window, Comments tab.

Comments - 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 Services in OSOS to record the services provided to the customer.

ENTERING AN ACHIEVEMENT OBJECTIVE
In order to record the SYEP service, an **Achievement Objective** must first be saved in the customer record.

Select the **Customer** module, **Services** window, **Achievement Objectives** tab. Select the **New Objective** button at the bottom of the screen.
Enter the new Achievement Objective according to the following guidelines:

**Achievement Objective** - Summer Youth Employment Program

**Type of Goal** - Occupational Skills

**Goal Attainment** - Set, but attainment pending

**Planned Start Date, Actual Start Date** - Start date of the expanded SYEP

**Planned End Date** - Anticipated end date of the expanded SYEP

**Evaluation Date** - Date halfway between the start and end dates

Click **Save**.
ENTERING THE SERVICE

After the Achievement Objective is saved in the customer record, the Summer Youth Employment Program service must be entered. 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.
Select the blank option at the top of the **WIB** dropdown menu.

Click the **Service Type** button.
Expand the L2 WIOA SYEP folder.

Then expand the WIOA SYEP folder.

Select the **Summer Youth Employment** service.

Click **OK**.

Then click **Search**.
This will bring up the Offering Detail screen.

Click the **Return to Search** button at the bottom of the screen.
Select the service 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.

In the **Planned Start Date** and **Actual Start Date** field, enter the date that the SYEP employment began.

In the **Planned End Date** field, enter the anticipated end date of the employment.

If the employment has ended already, enter that date in the **Actual End Date** field. If it has not, leave that blank for now.

Select Youth Services in the **Program Service Type** dropdown menu.

Select the Summer Youth Employment Program **Achievement Objective**.

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 **Youth Statewide 15%** funding for **2021**.

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 services are closed when appropriate. Funded services, other than Follow-Up Services, that remain open will prevent a customer from exiting their enrollment.

The SYEP service must be closed when the youth customer has completed or exited the program.

To close the service, navigate to the Customer module, Services window, Services tab. Select the Statewide WIOA SYEP service.
Enter the end date of the employment in the **Actual End Date** field.

Indicate if the summer youth employment program was completed successfully or not in the **Completed Successfully** field.

Click **Save**.
Be sure to also make any appropriate updates to the record’s Work History tab, adding an End Date if the youth separates from their SYEP employer.
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