OYCEA-City of Albany OSOS Guide

8/2/2019

TABLE OF CONTENTS

Purpose 1
Searching for the Customer 2
Search Options 3
Quick Search 5
Basic Customer Record 11
Basic Customer Record Details 12
Case Notes 14
Comprehensive Assessment 15
Services 18
Entering an Achievement Objective 18
Entering the Service 20
Saving the first enrolling service ..... **Error! Bookmark not defined.**
Closing a Service 28
Follow Up Services 30
Resources and Assistance 34

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 on how to conduct the OSOS data entry for the Opportunity Youth Career Exploration and Access (OYCEA) Program.

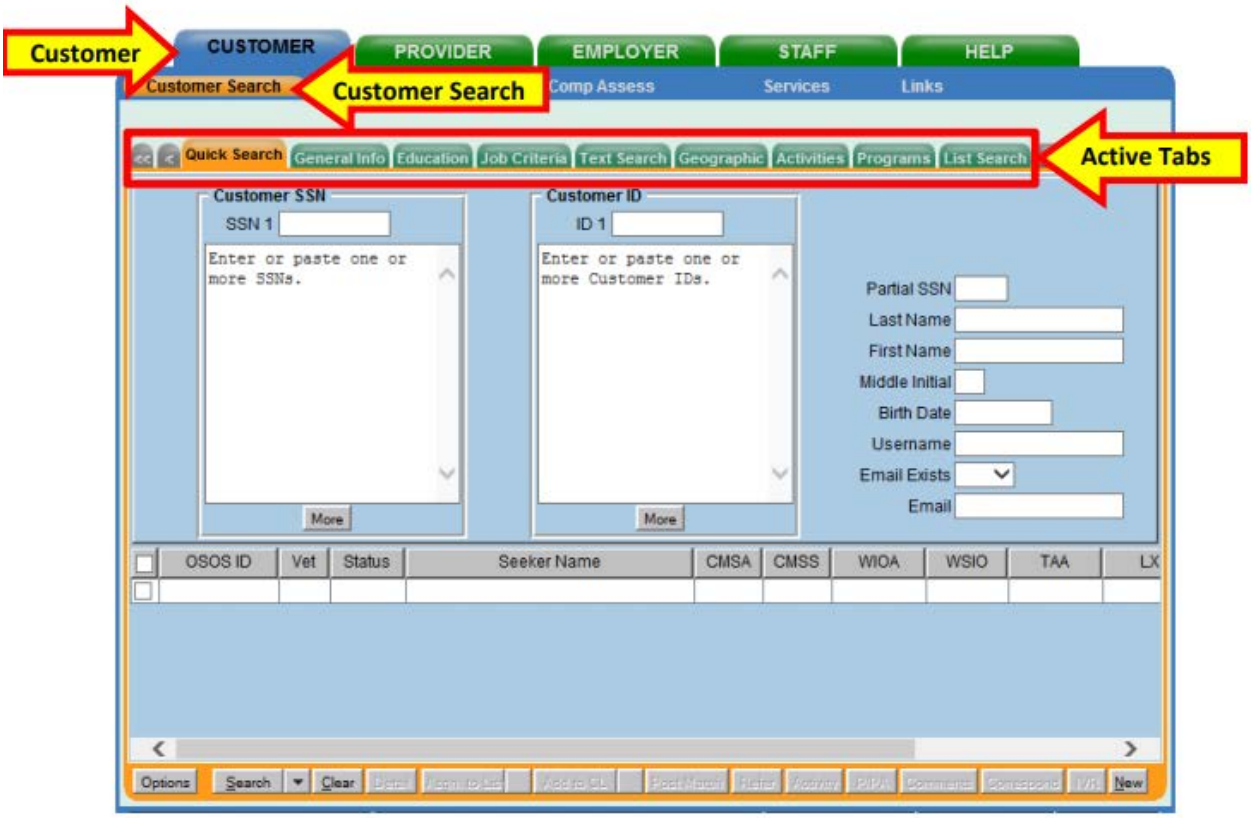
Please see the OYCEA RFP for additional information on the OYCEA Program: OYCEA RFP

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.

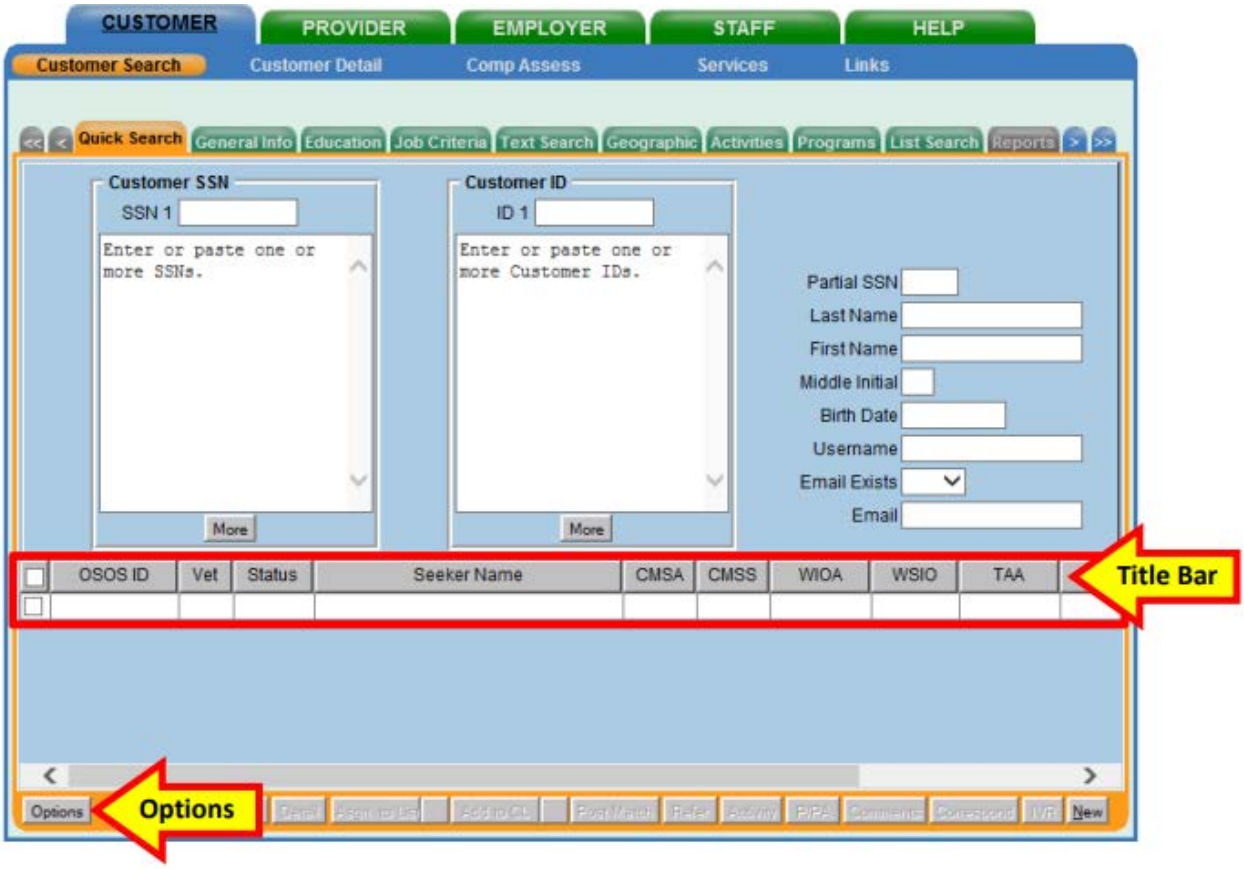
While searches are most commonly performed from the **Quick Search** tab, any of the active tabs can be used in the search process. In addition, once you are case managing a customer, and their Customer ID is known, you may search for the customer using the Customer ID field.



SEARCH OPTIONS

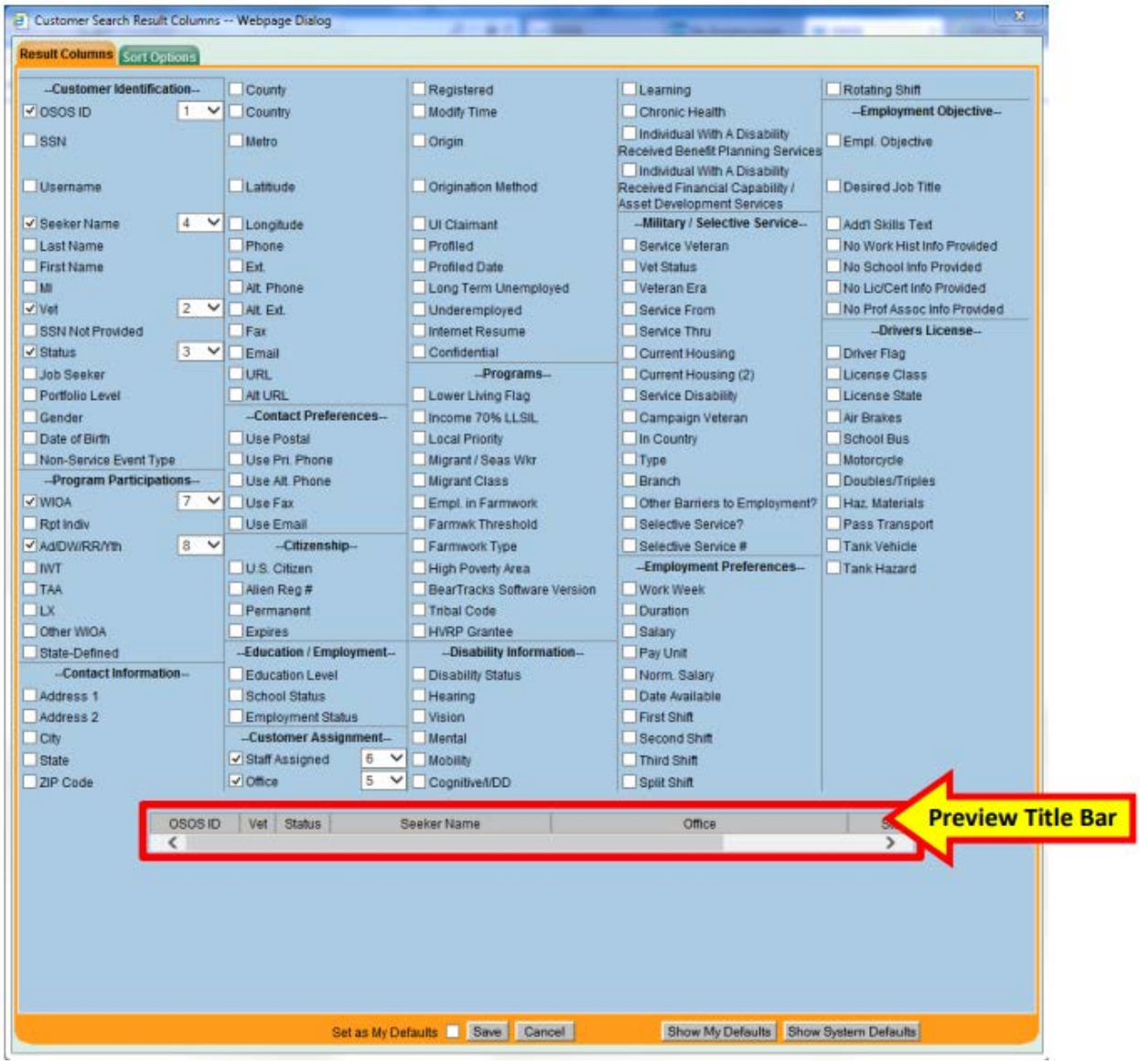
Before conducting a customer search, staff should customize their search options that will be displayed in the **Title Bar**.

To access the search options, click on the **Options** button at the bottom left of the screen.



The **Customer Search Result Columns** pop-up window displays all the fields that can be added to the title bar. These fields can be selected or de-selected by clicking on the checkbox next to them.

The number to the right of the field name indicates the order in which the fields will be displayed on the title bar. Staff can change this order by manually re-numbering the selected fields or by clicking and dragging the sections in the gray preview title bar at the bottom of the pop-up.



Helpful fields that staff should consider including in their search results are: **OSOS ID, Seeker Name, Status, Date of Birth, and City.**

Seeker Name *and* ***Date of Birth*** *are both important fields to include, as staff can use this information to easily identify potential duplicate OSOS records. Duplicate records should be emailed to Help.OSOS@labor.ny.gov*

Once staff have selected the fields and the display order that will be most useful to them, click the **Set as My Default** checkbox and then click the **Save** button. This ensures that these settings will remain as the default settings used each time that the staff member runs a customer search in OSOS. These settings can be changed at any time, either to alter the defaults or to run a single search.

QUICK SEARCH

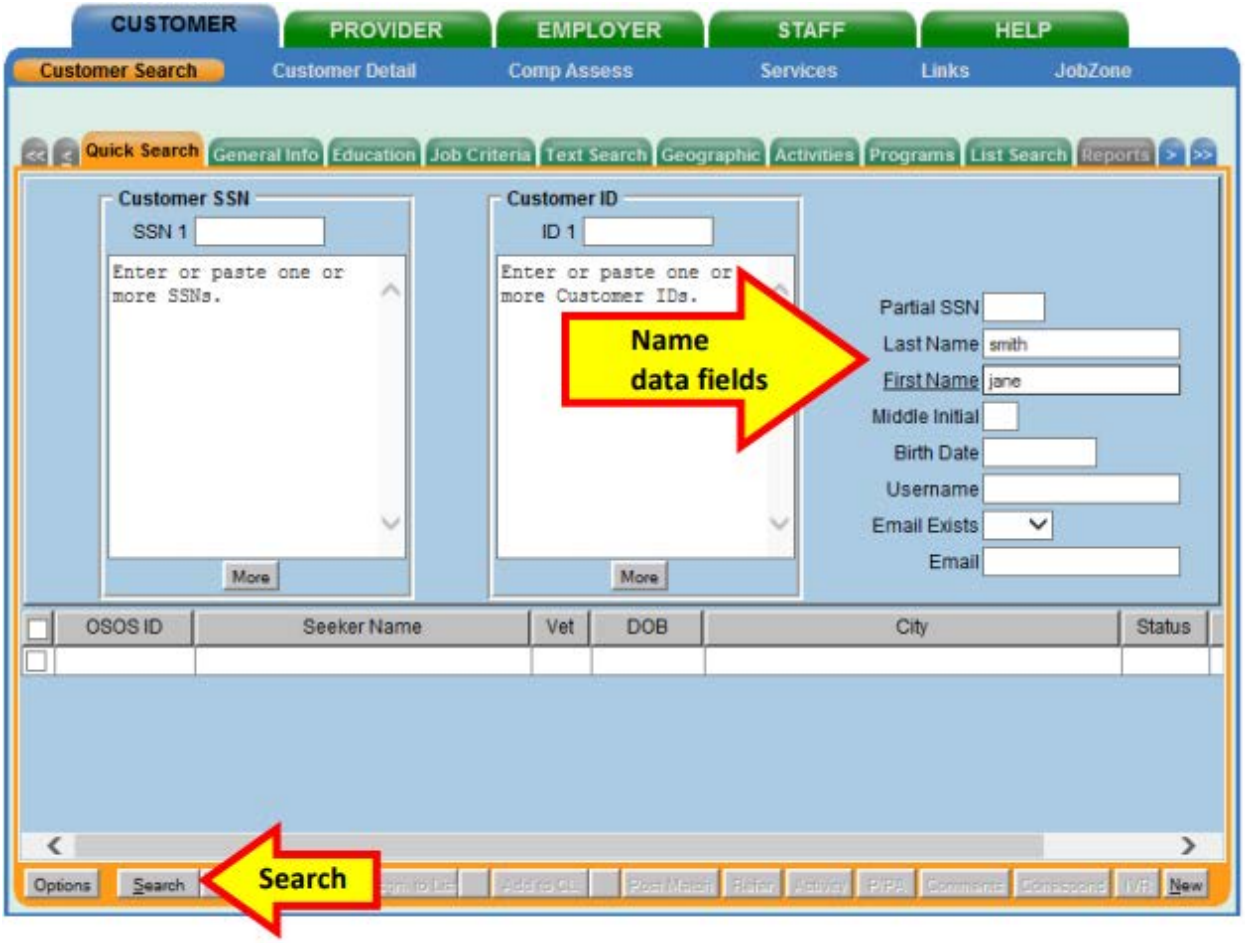
A customer search is most commonly performed from the **Customer Search** window**, Quick Search** tab. There are numerous ways a customer search can be conducted depending on the information the staff has obtained. Staff will mainly search by **Customer Full** or **Partial Name**.

SEARCHING BY CUSTOMER FULL OR PARTIAL NAME

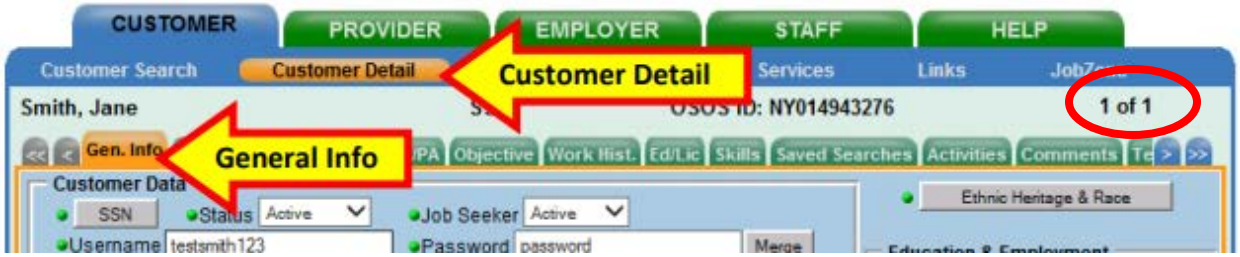
Staff may search for a customer record by full or partial name. Enter as much information as is known in the **Last Name** and **First Name** data fields.

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

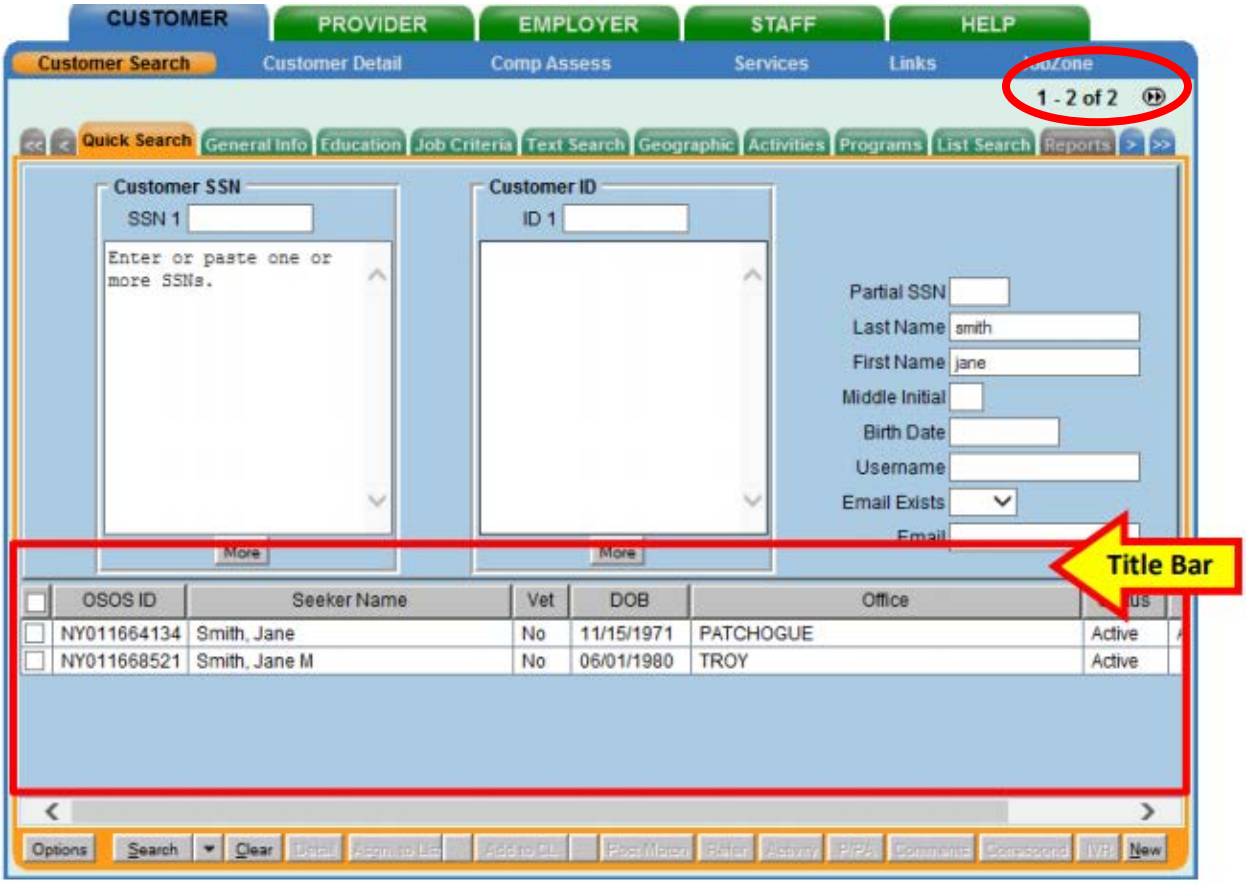
Click the **Search** button.



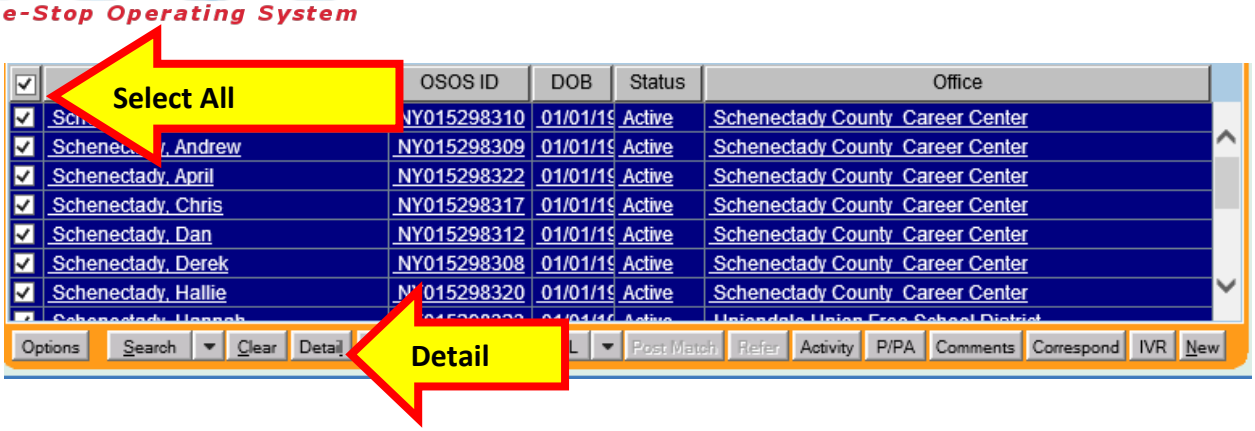
If there is only one result returned, OSOS will display the customer's record. It will default to the **General Information** tab of the **Customer Detail** window.



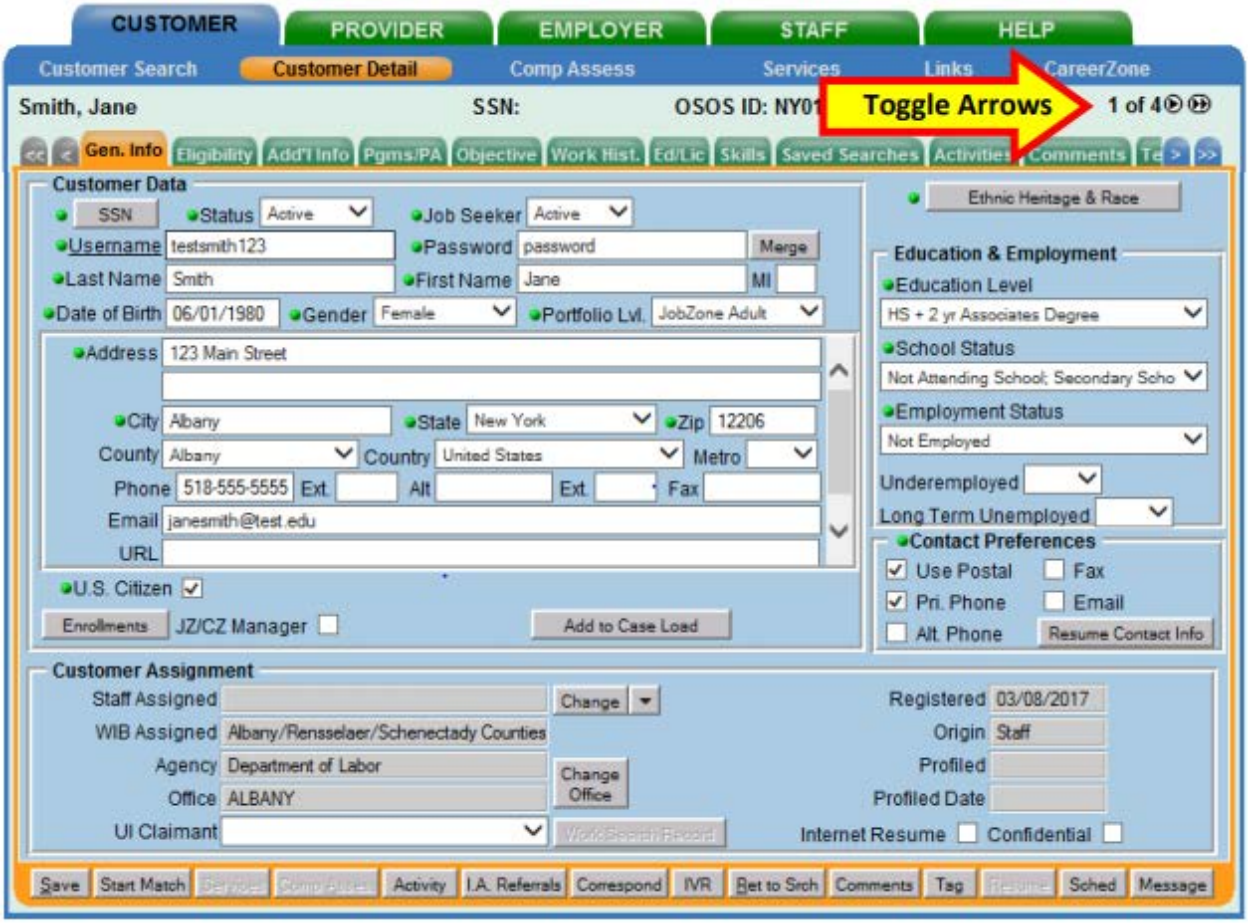
If there is more than one customer record matching the search criteria, the customers' information will be displayed in the window below the data entry fields.



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.


Select All
OSOS ID
DOB
Status
Office
Schenectady, Andrew
NY015298309
01/01/19
Active
Schenectady County Career Center
Schenectady, April
NY015298322
Schenectady, Chris
NY015298317
Schenectady, Dan
NY015298312
Schenectady, Derek
NY015298308
Schenectady, Hallie
Options
Search
Clear
Detail
Post Match
Refer
Activity
P/PA
Comments
Correspond
IVR
New

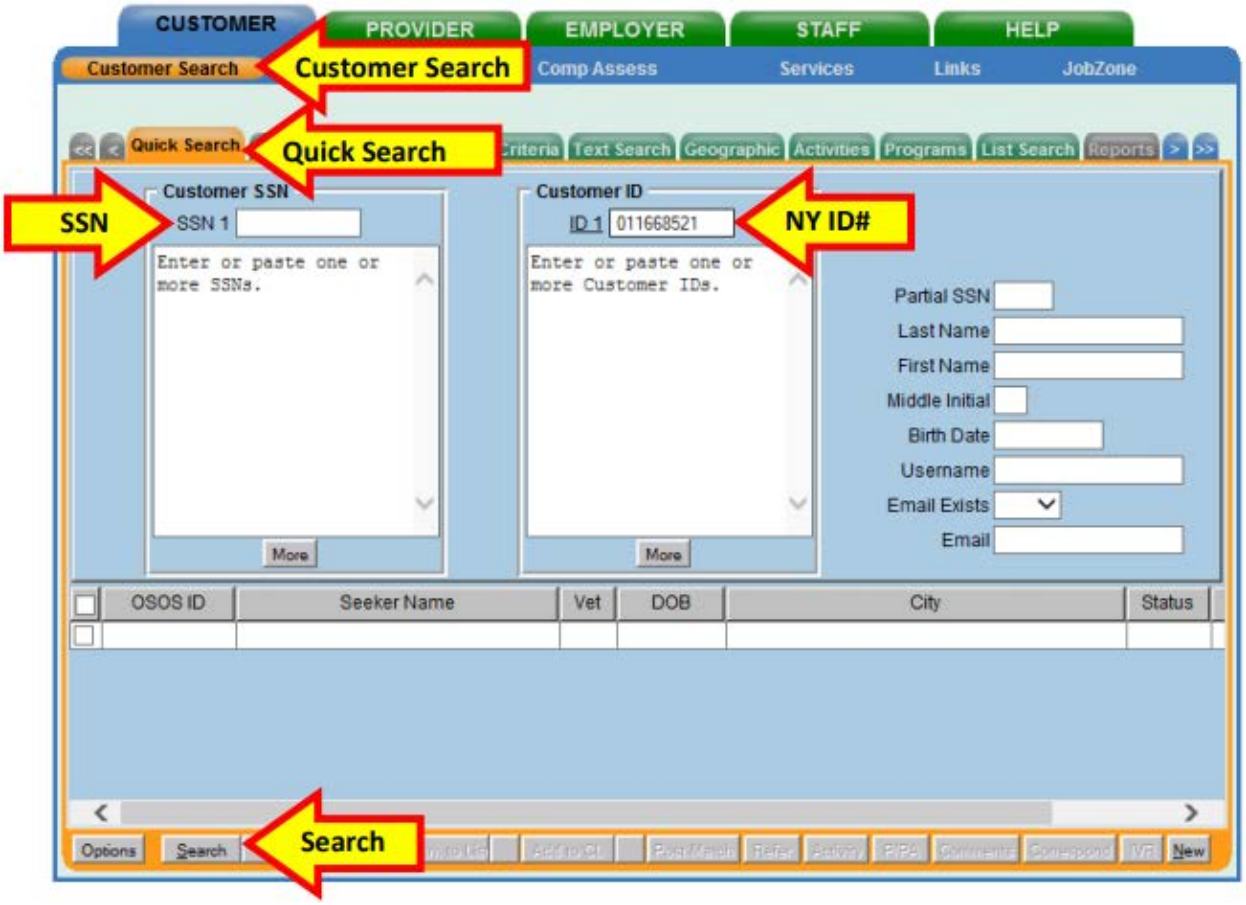
OSOS will display the customer record of the first customer selected. Use the arrows at the top right corner of the screen to toggle through the customer records. Staff can review the records to identify the customer they were searching for, as well as to identify potential duplicate records.



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.

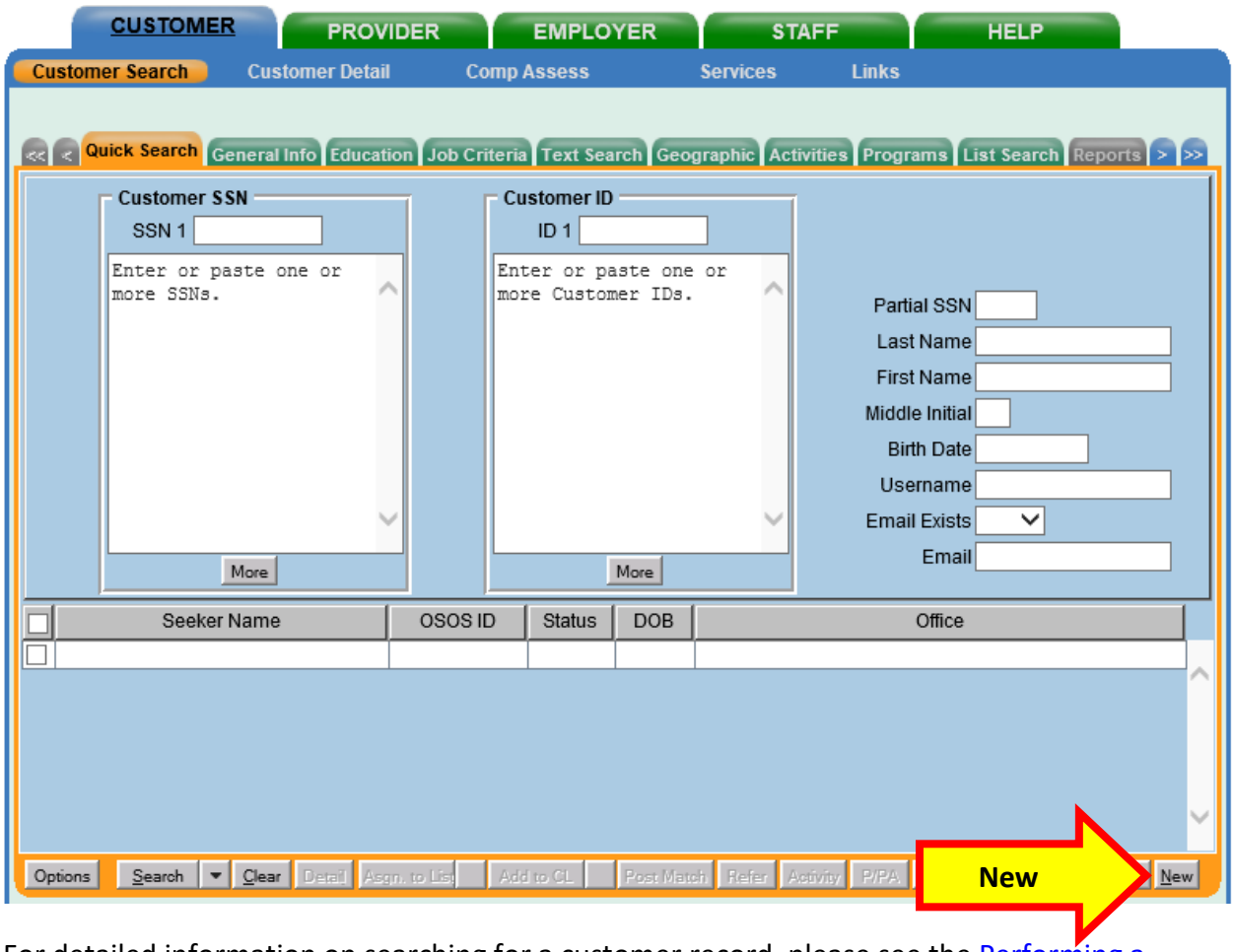
Then click the **Search** button at the bottom of the screen.



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.



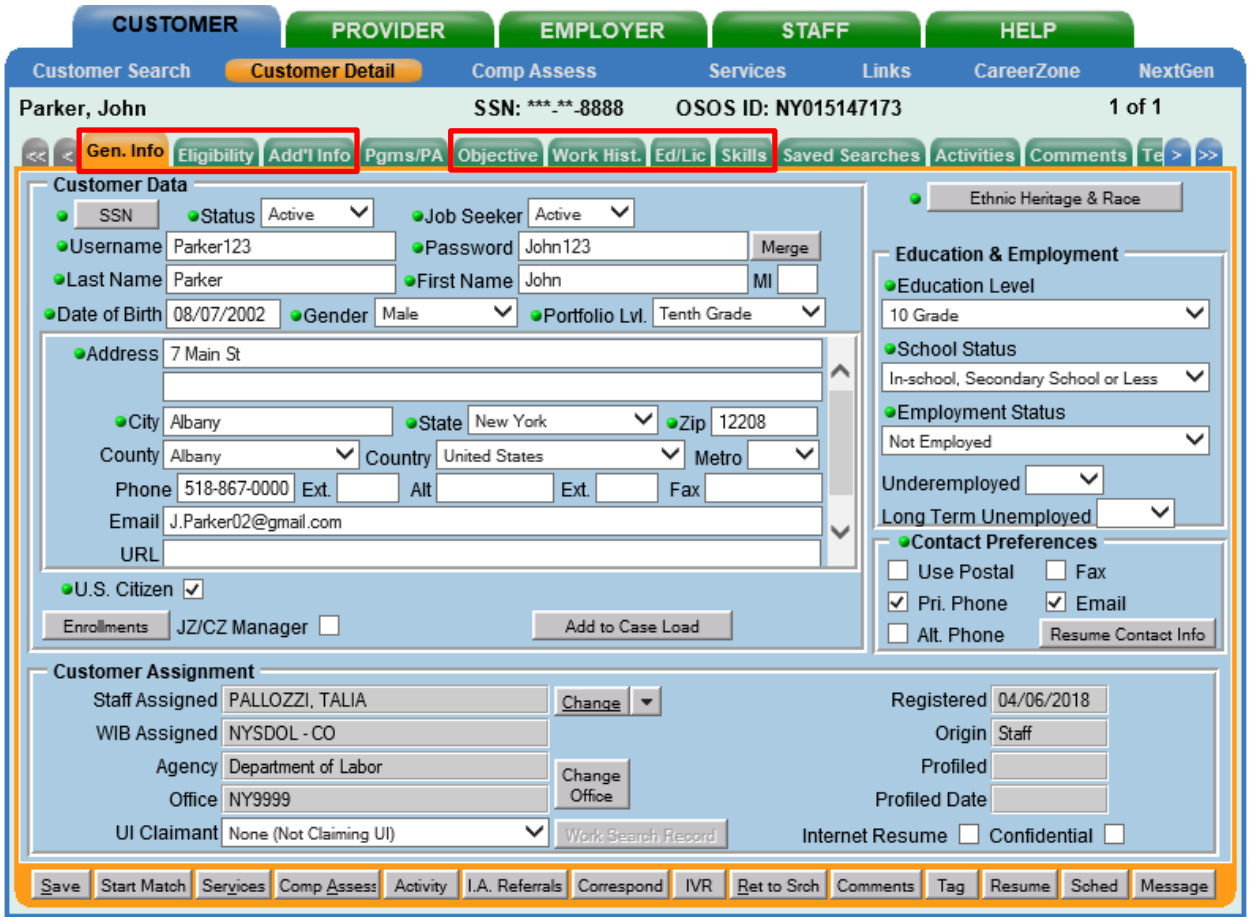
For detailed information on searching for a customer record, please see the [Performing a Customer Search OSOS Guide].

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. 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 Creating a Basic Customer Record OSOS Guide.

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

- **Gen. Info** tab
  - **SSN**: Select the **SSN** button. If 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. This also affects performance measures. Entering a customer's SSN helps prevent duplicate records. If the customer does not provide their SSN, select **Not Disclosed**. The SSN field is located "behind" a button in order to keep it as confidential as possible.
  - **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 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.
  - **Education Level** - Select the highest level of education completed.
  - **Portfolio Level** - Select the highest level of education completed.

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.***

- **Eligibility** tab
  - **Income Info** - **Lower Living Standard** and **Income 70% LLSIL** are required fields. Select **Yes**, **No** or **Not Disclosed**. Where appropriate, select Yes only for Lower Living Standard OR Income 70% SSIL. Do not select Yes for both. The Income Eligibility Guidelines can be found on the DOL Programs & Tools webpage, under Income Eligibility Guidelines.
  - **High Poverty Area**: This field is required for any customer 25 years old or younger. It is one of the fields that determines eligibility for the WIOA Youth Program. Information to determine High Poverty Area can be found here.
  - **Disability Status**: If **Disabled** is selected, staff must select at least one **Disability Category**. Please note, **Not Disclosed** is an option if the customer does not want to identify their disability.
  - **Migrant Seasonal**: If **Yes** is selected, additional required fields will be displayed.
- **Add'l Info**
  - **Service Veteran**: Select **Yes**, **No**, or **Not** Disclosed. If **No** or **Not Disclosed** is selected, no additional information is required. However, if **Yes** is selected, it will display additional required fields.
  - **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.
- **Pgms/PA**: This tab does not contain any required information. However, if your customer discloses that they are receiving public assistance, such as free or reduced school lunch, it should be recorded 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**
  - **Employment Objective:** This summarizes the customer's qualifications and desired position.
  - **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 customer's desired job title. Check the box next to the job title. Then click **Select**.

- **Acceptable Job Locations**: Enter at least one **Acceptable Job Location**.

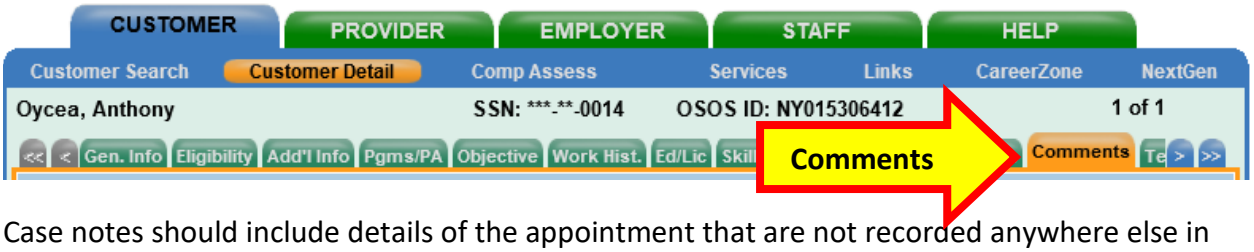
- **Work History**
  - Select **New Job Entry** to enter a work history for the customer. Enter all required fields and any additional information provided by the customer.
  - If the customer does not have any Work History, select **No Information Provided**.

- **Ed/Lic**
  - 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**
  - **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.

It is best practice to use the SENSE model when documenting case notes. Details on the SENSE model can be found in the [Writing an Effective Youth Program Case Note in OSOS Guide](#).

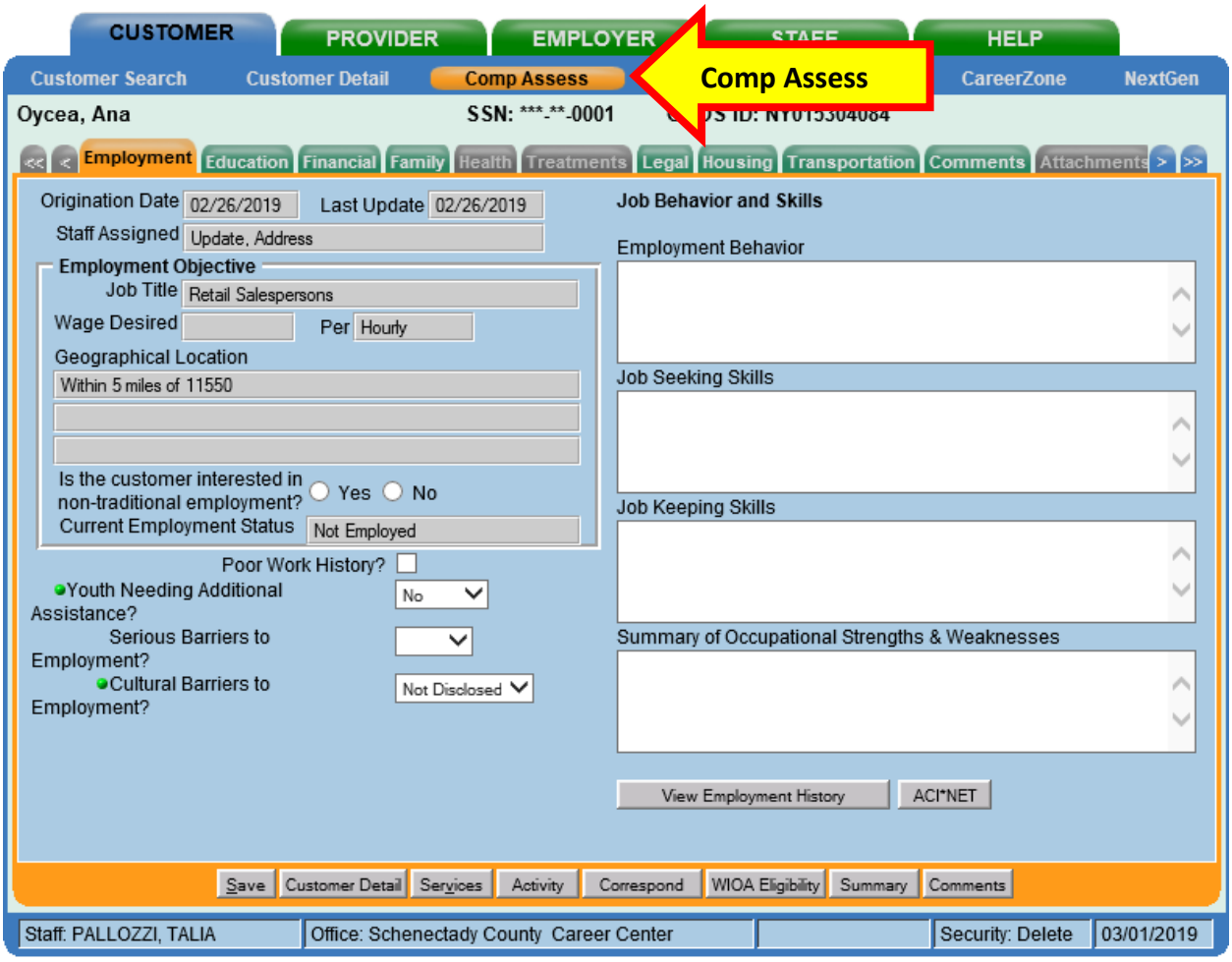
COMPREHENSIVE ASSESSMENT

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 OYCEA grant, 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 grant, 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. It is important to record applicable **Transportation Information** to identify if the customer can access services and obtain education or employment. 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.

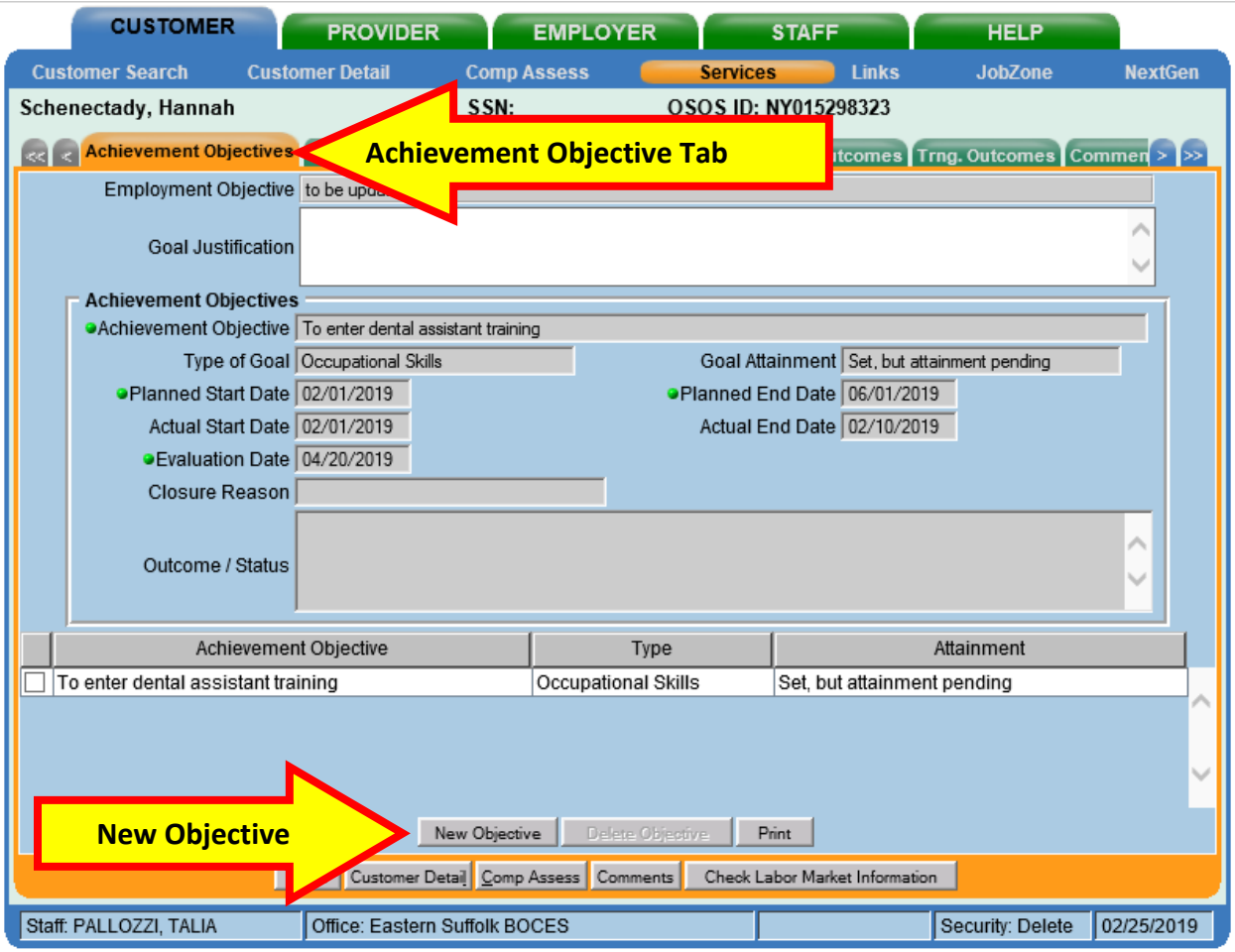
SERVICES

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

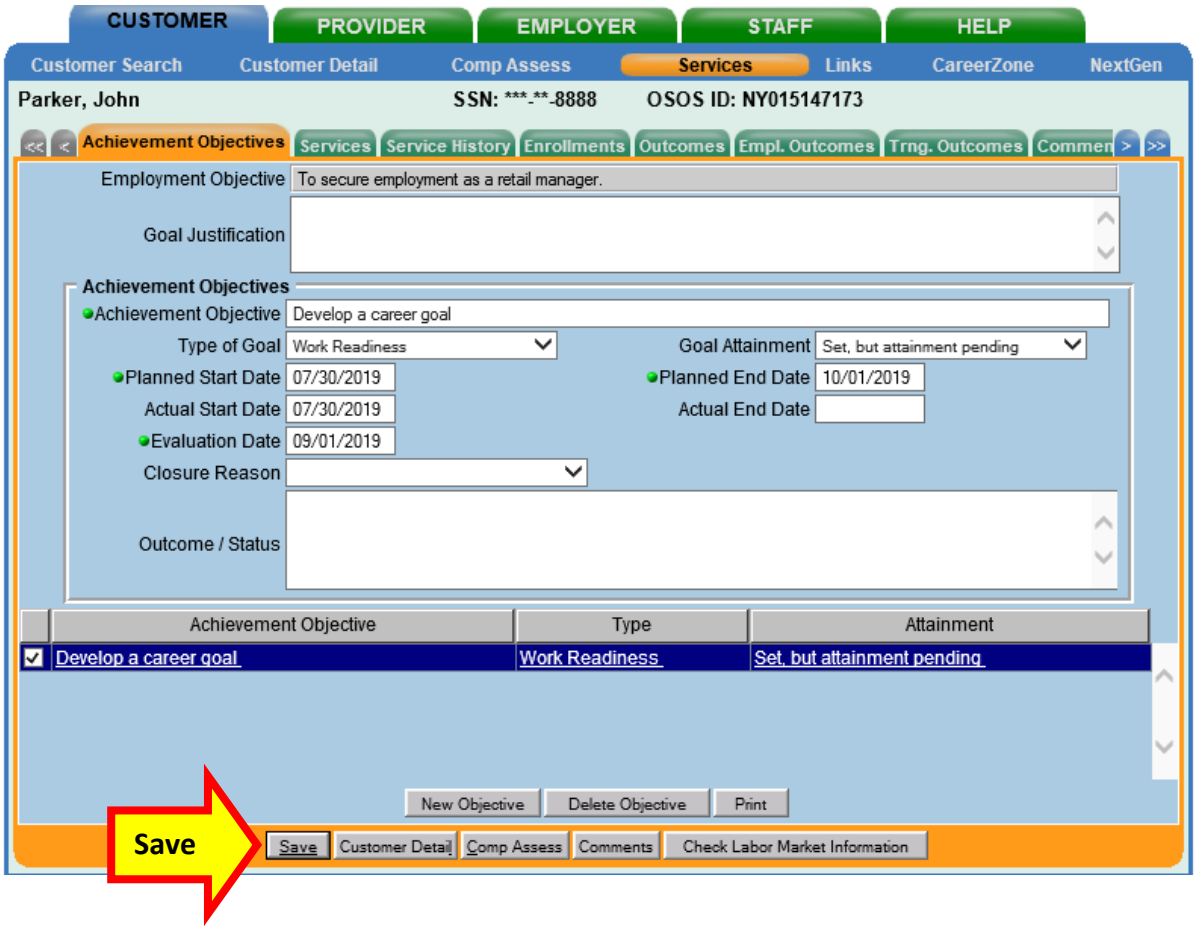
ENTERING AN ACHIEVEMENT OBJECTIVE

In order to enter a Youth Service for the customer, 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.

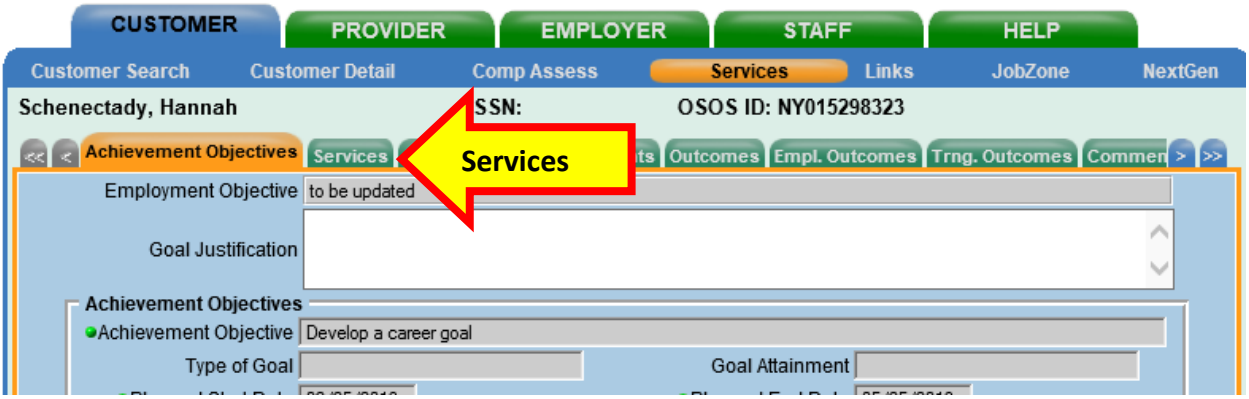


Enter the **Achievement Objective, Type of Goal, Planned Start Date, Actual Start Date, Evaluation Date, Goal Attainment and Planned End Date**. Click **Save.**

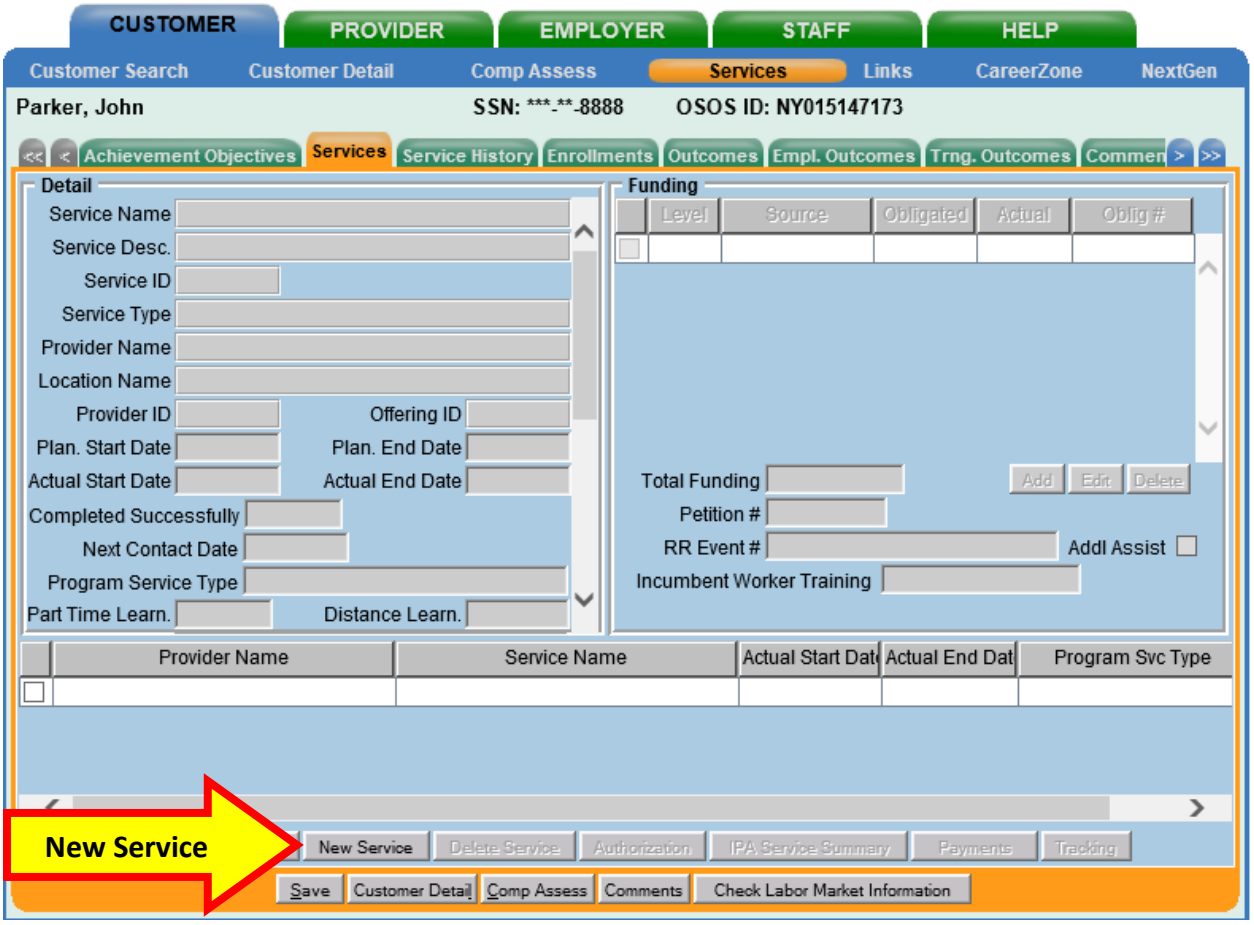


ENTERING THE SERVICE

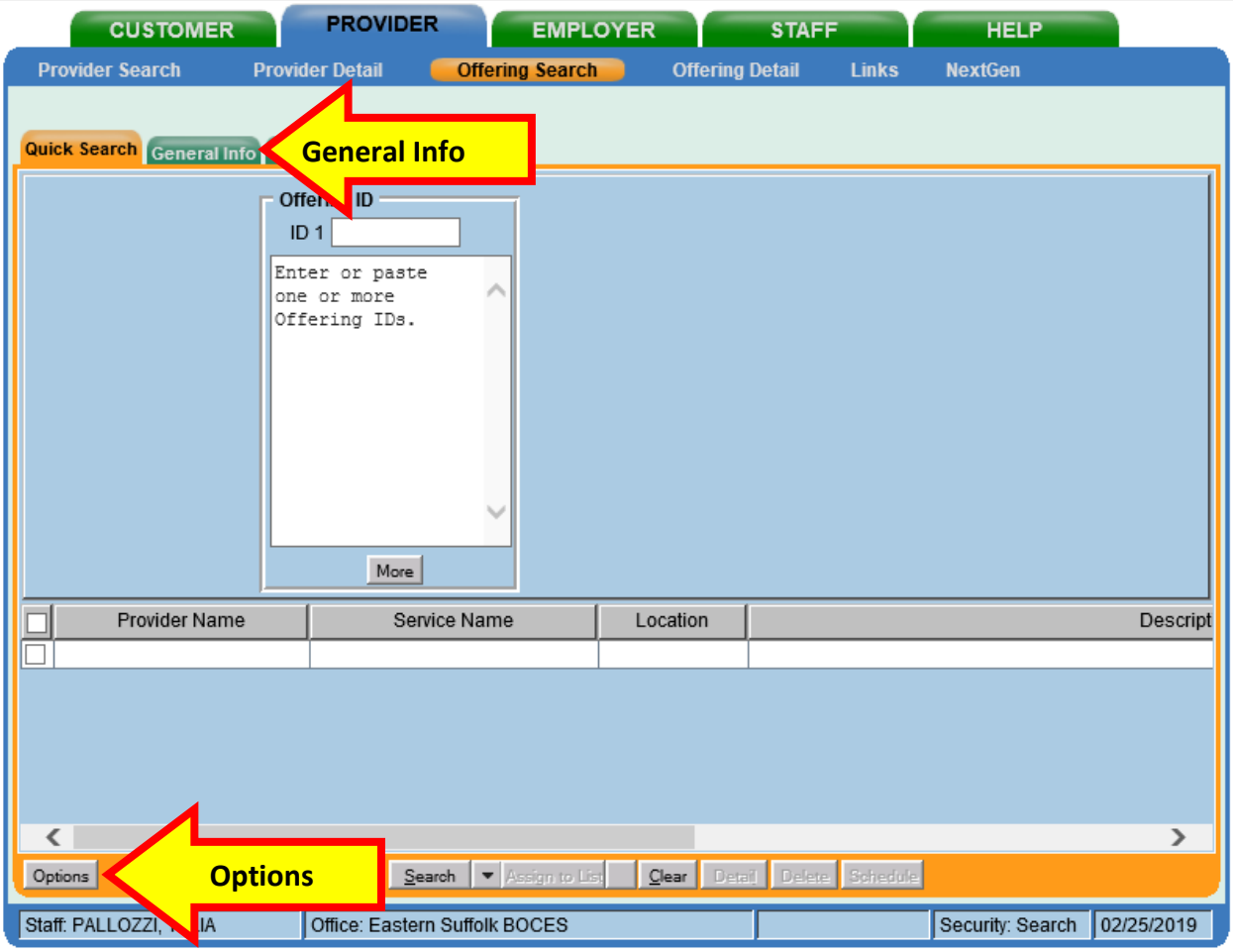
Once there is an appropriate **Achievement Objective** saved in the customer record, you can enter a Service. Select the **Services** tab.



Select the **New Service** button.



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



Before searching for the Service, click the **Options** button to customize your search results. This opens the Offering Search Results Columns Webpage Dialogue box. Select the following display results, using the order provided below:

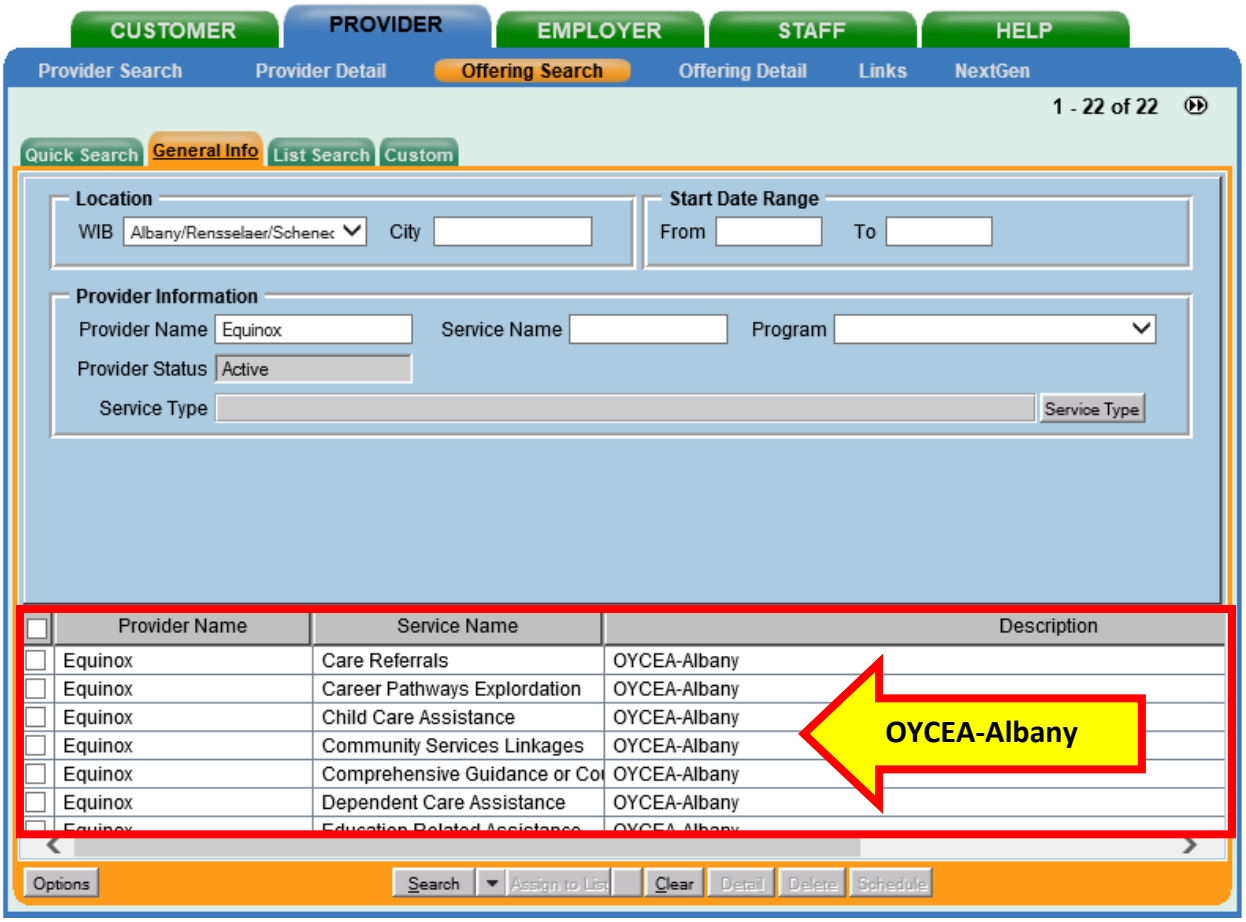
- **Provider Name** (1)
- **Service Name** (2)
- **Service Description** (3)
- **Location Name** (4)

Select the **Set as My Defaults** check box. Then, click **Save**.

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

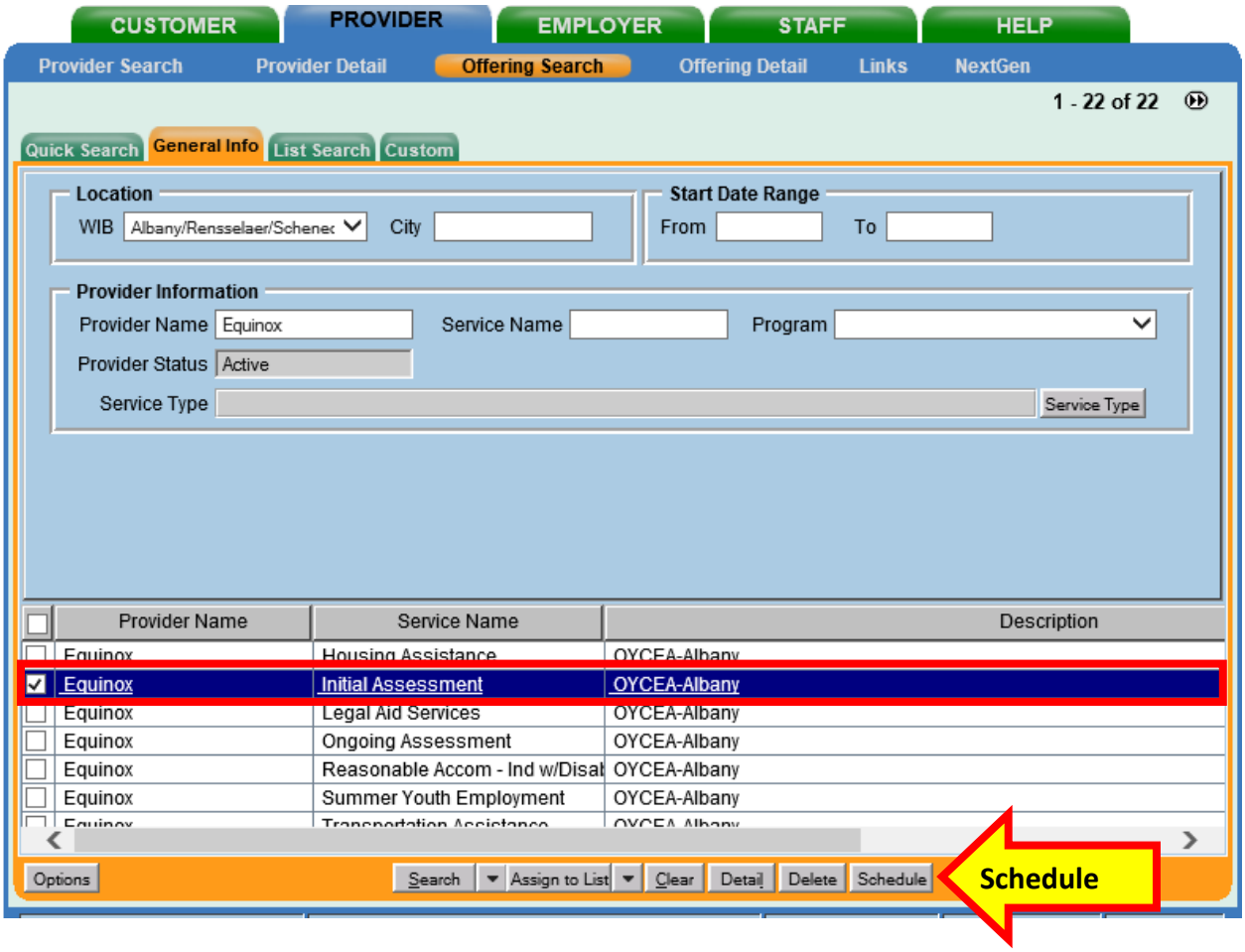
Verify the correct **WIB** is selected, enter your organization's name into the **Provider Name** field and click the **Search** button. The search results will be presented at the bottom.

Select the **Description** column to sort the results alphabetically by Description. Then scroll down to view the **OYCEA-Albany** offerings.



*All of the Services for OYCEA participants will be identified by listing **OYCEA-Albany** in the Description. Do not select any Service that does not have this description.*

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



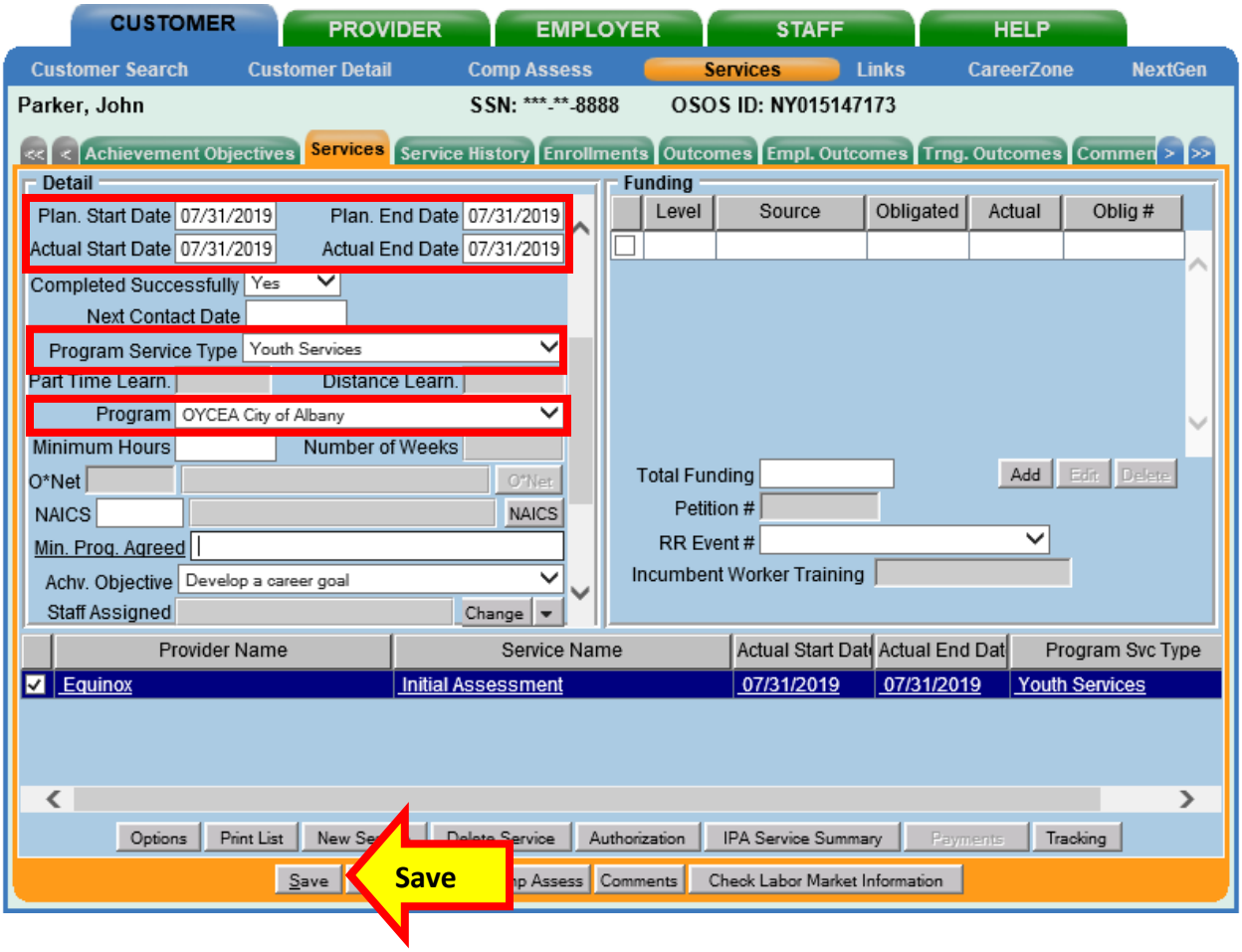
This brings you to the **Customer** module, **Services** window, **Services** tab.

Enter in the following fields: **Plan Start Date, Plan End Date, and Actual Start Date.**

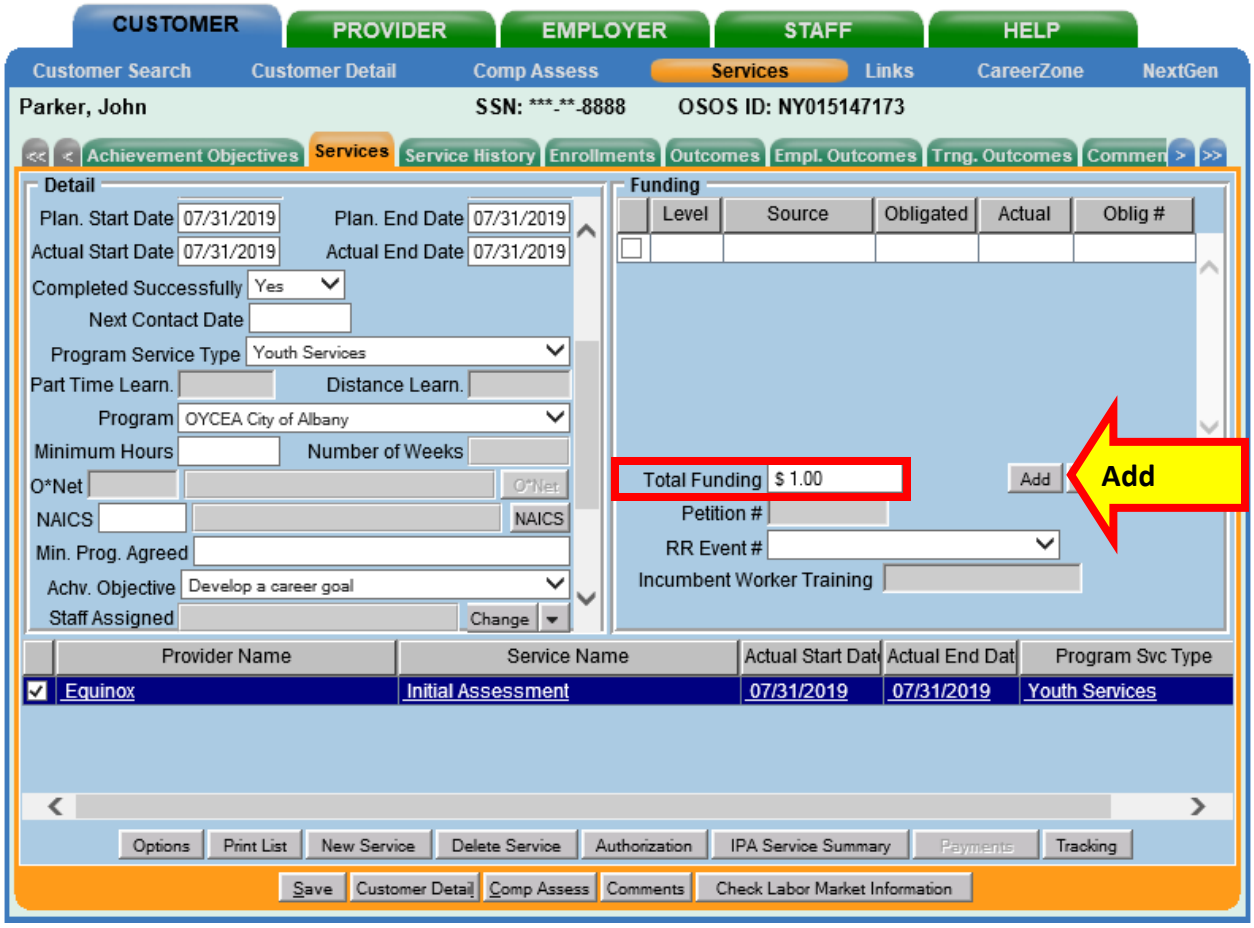
Many services may be provided in one day. If this is the case, enter the same date for the **Actual Start Date** and **Actual End Date** of the service. From the drop downs, select options for **Completed Successfully** (yes/no), **Program Service Type** (will be Youth Services except when entering a Follow-up Service. This will be addressed later in the Guide)**, Program** (OYCEA City of Albany)**,** and the appropriate **Achievement Objective**.

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. From the drop downs, select **Program Service Type** (will be Youth Services except when entering a Follow-up Service. This will be addressed later in the Guide)**, Program** (OYCEA City of Albany)**,** and the appropriate **Achievement Objective**.

Click the **Save** button.

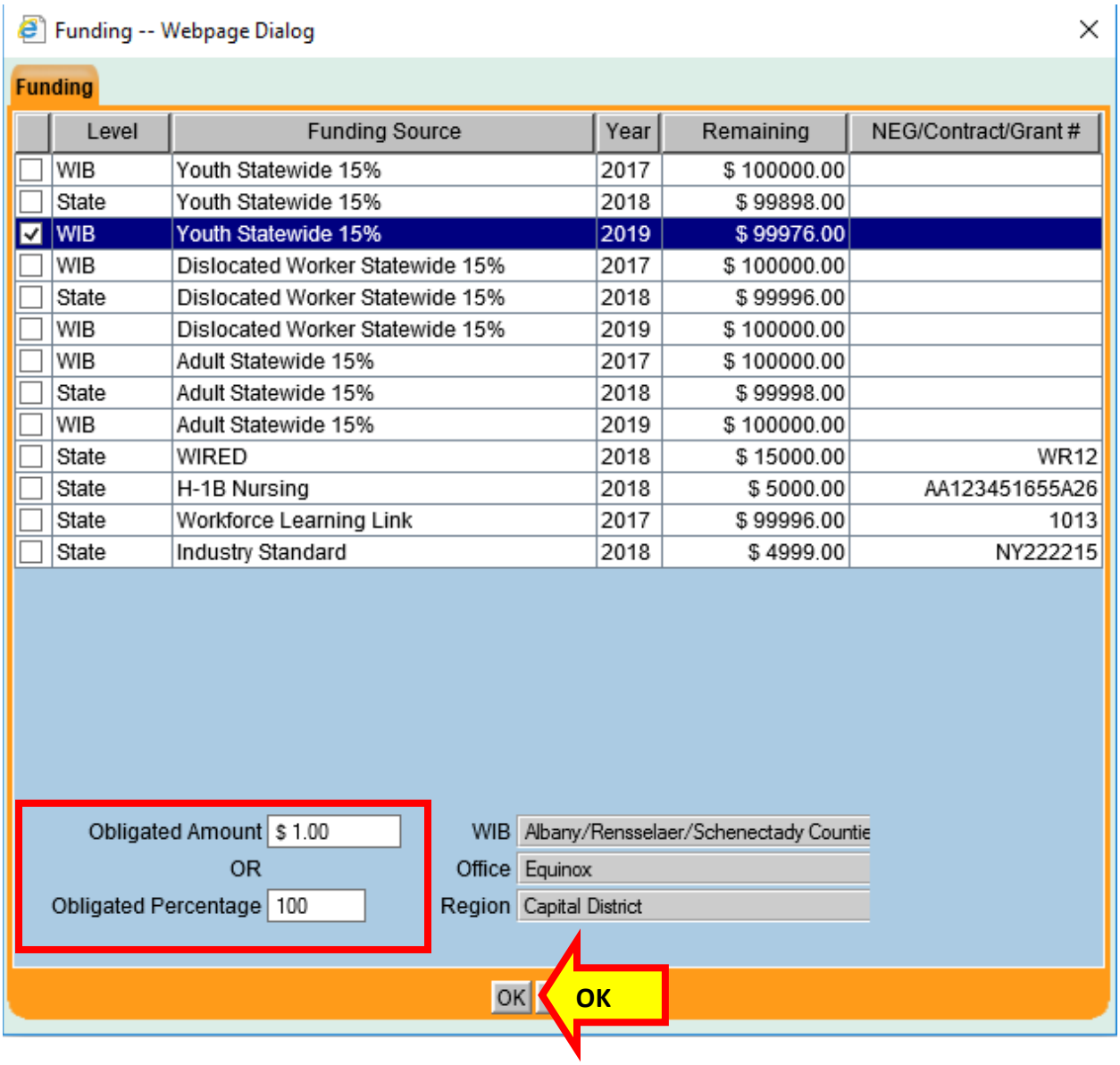


Next, you will attach the funding. Enter 1 into the **Total Funding** field. Then click the **Add** button.

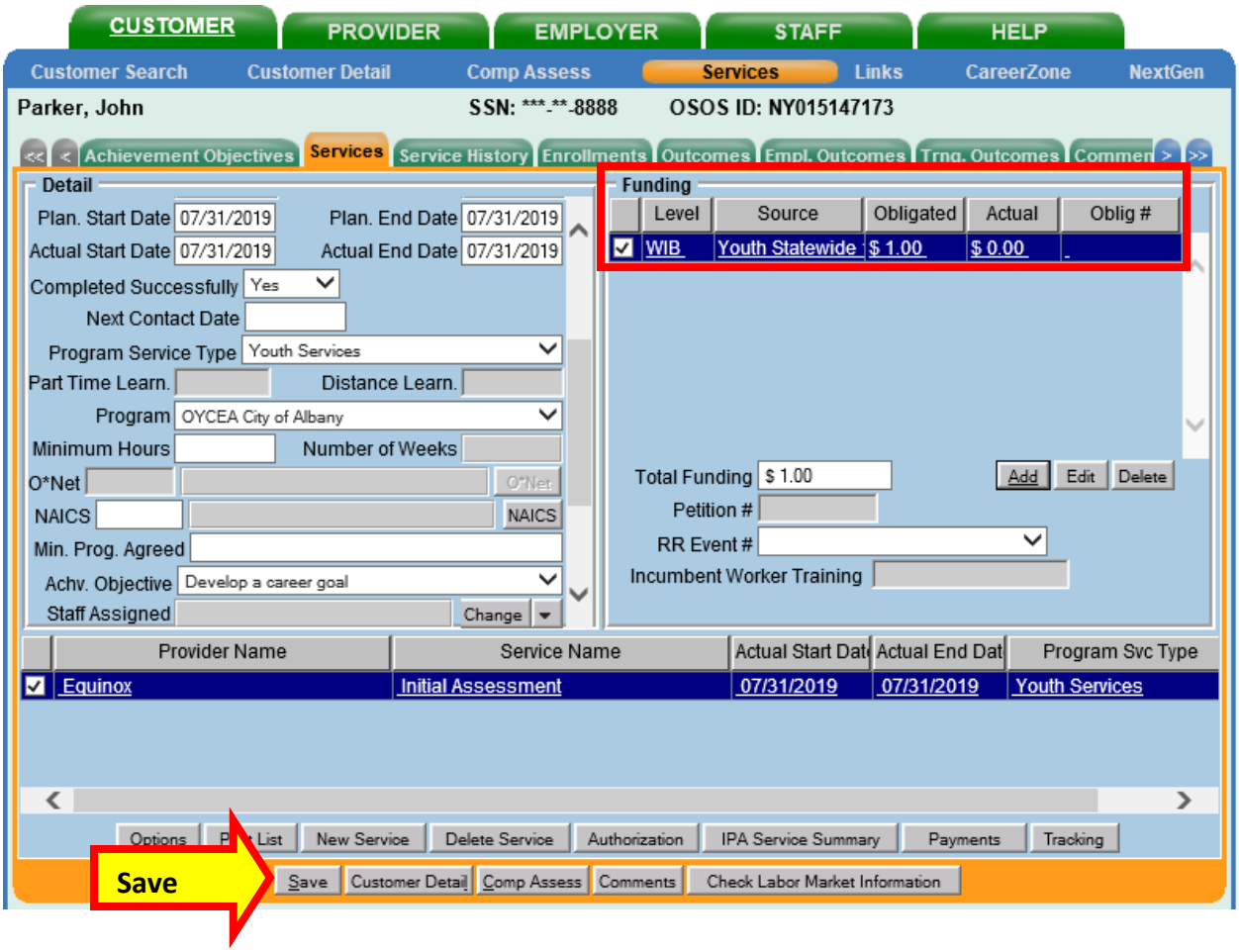


The **Funding Webpage Dialogue** box will open. For services that start prior to July 1, 2019, select **Youth Statewide 15%** funding for **2018**. For services that start July 1, 2019 or after, select **Youth Statewide 15%** funding for **2019**.

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



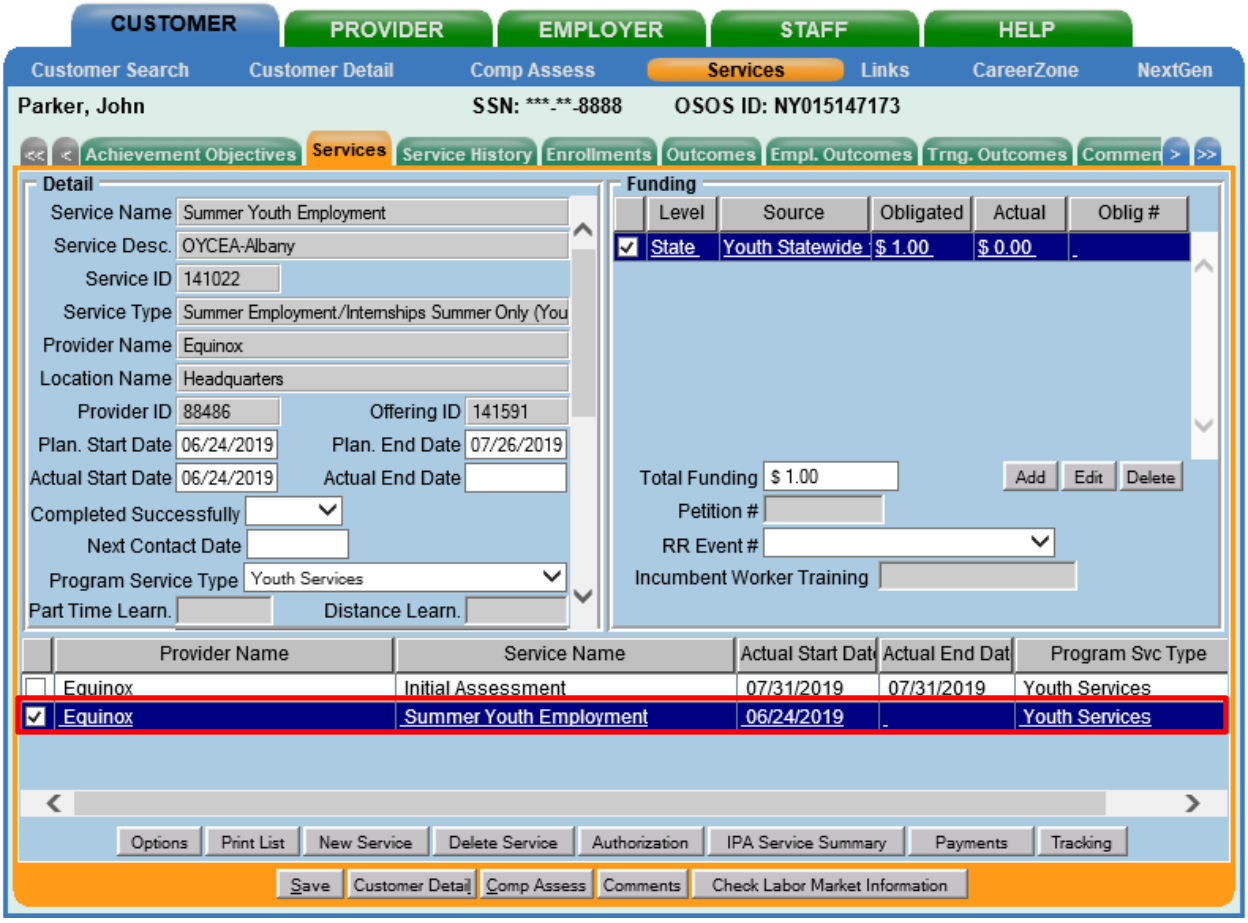
The appropriate funding has now populated the **Funding** section. Click **Save** at the bottom of the screen.



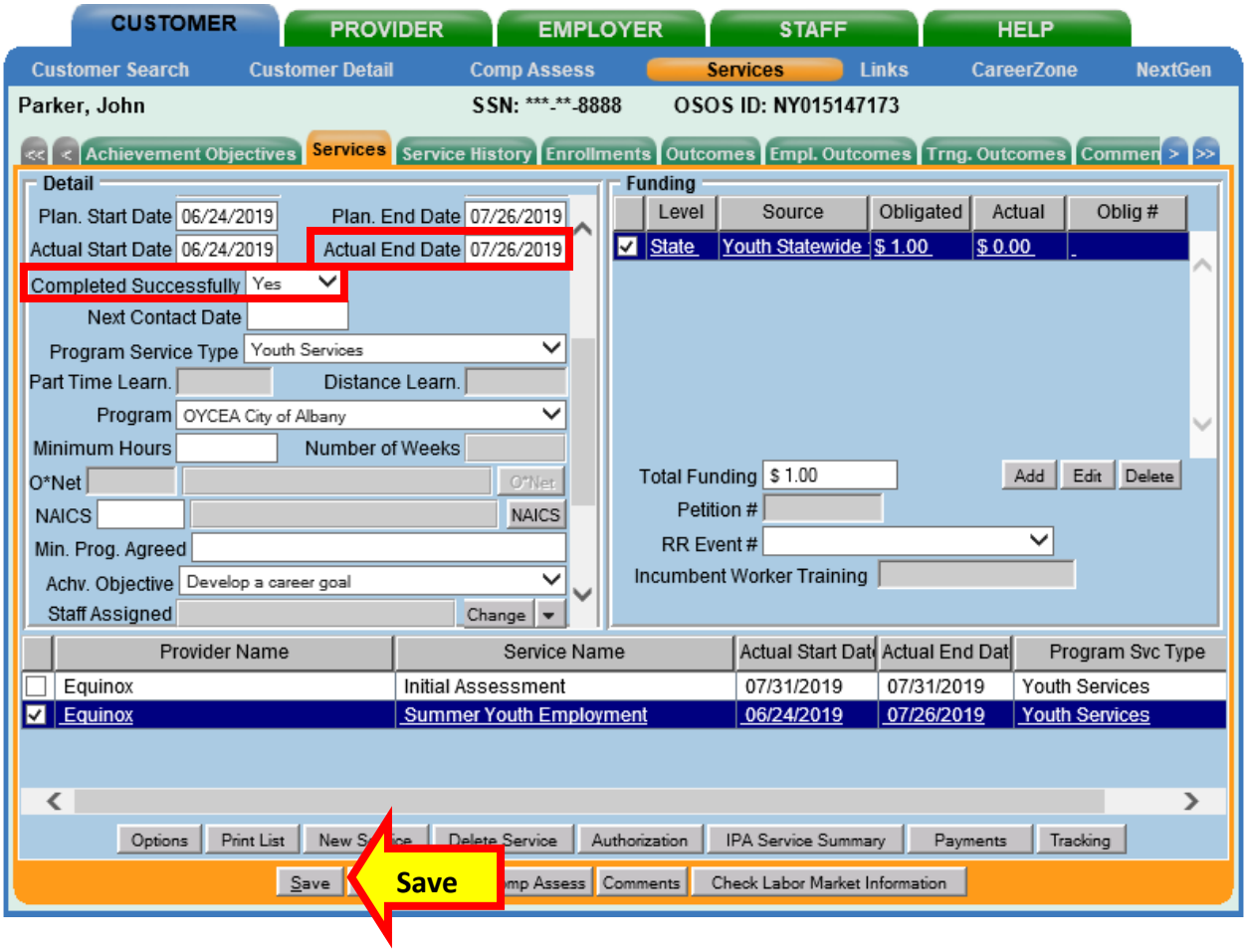
CLOSING A SERVICE

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.

To close the 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.



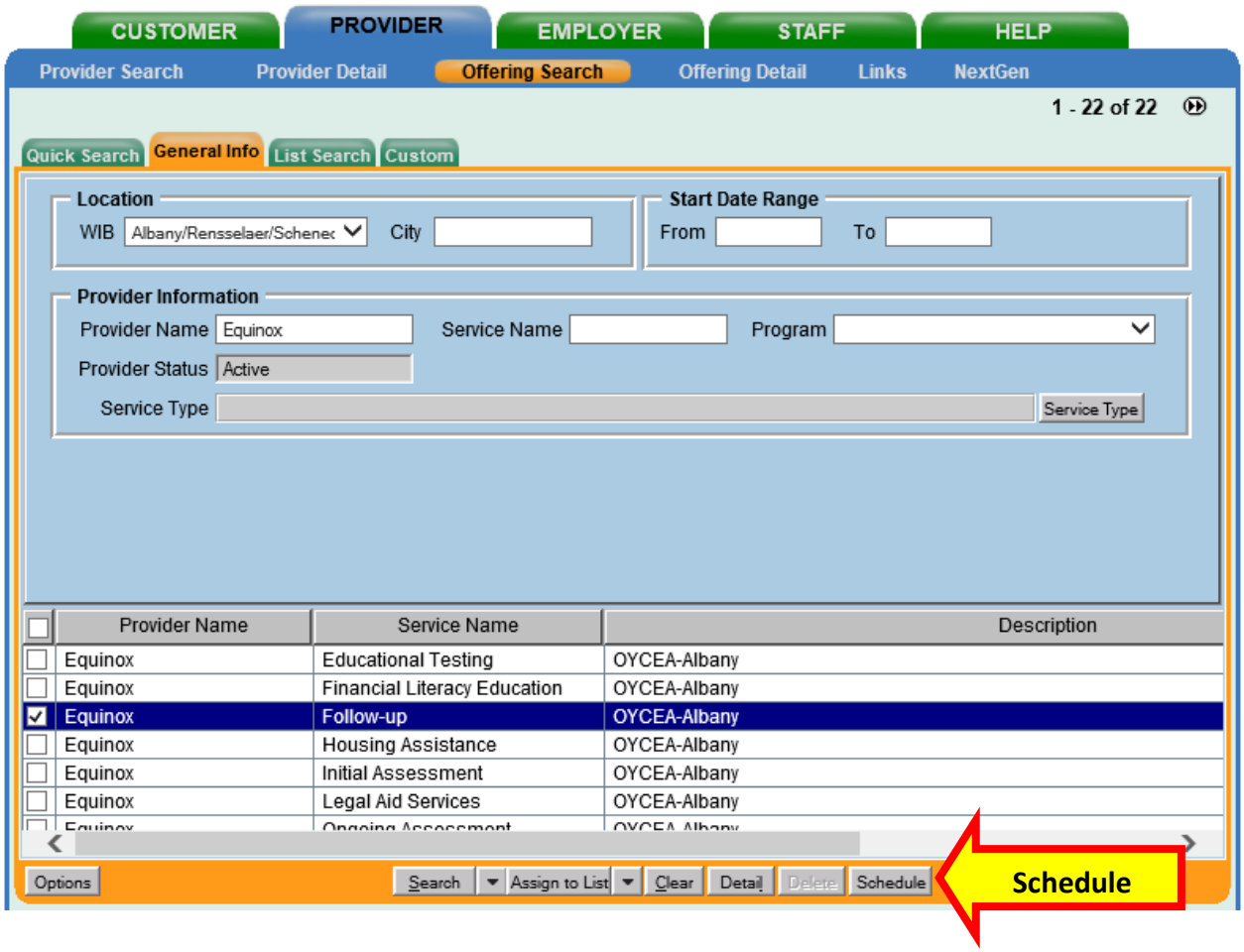
FOLLOW UP SERVICES

The process for entering follow up services is similar to the directions above. Navigate to the **Customer** module, **Services** window, **Services** tab. Select the **New Service** button. This will bring you to the **Provider** module, **Offering Search** window, **Quick Search** tab. Select the **General Info** tab.

Verify the correct **WIB** is selected, enter your organization's name into the **Provider Name** field and click the **Search** button. The search results will be presented at the bottom.

Select the **Description** column to sort the results alphabetically by Description. Then scroll down to view the **OYCEA-Albany** offerings (as indicated in the Description column). Select **Follow up** (as indicated in the Service Name column).

Click the **Schedule** button.

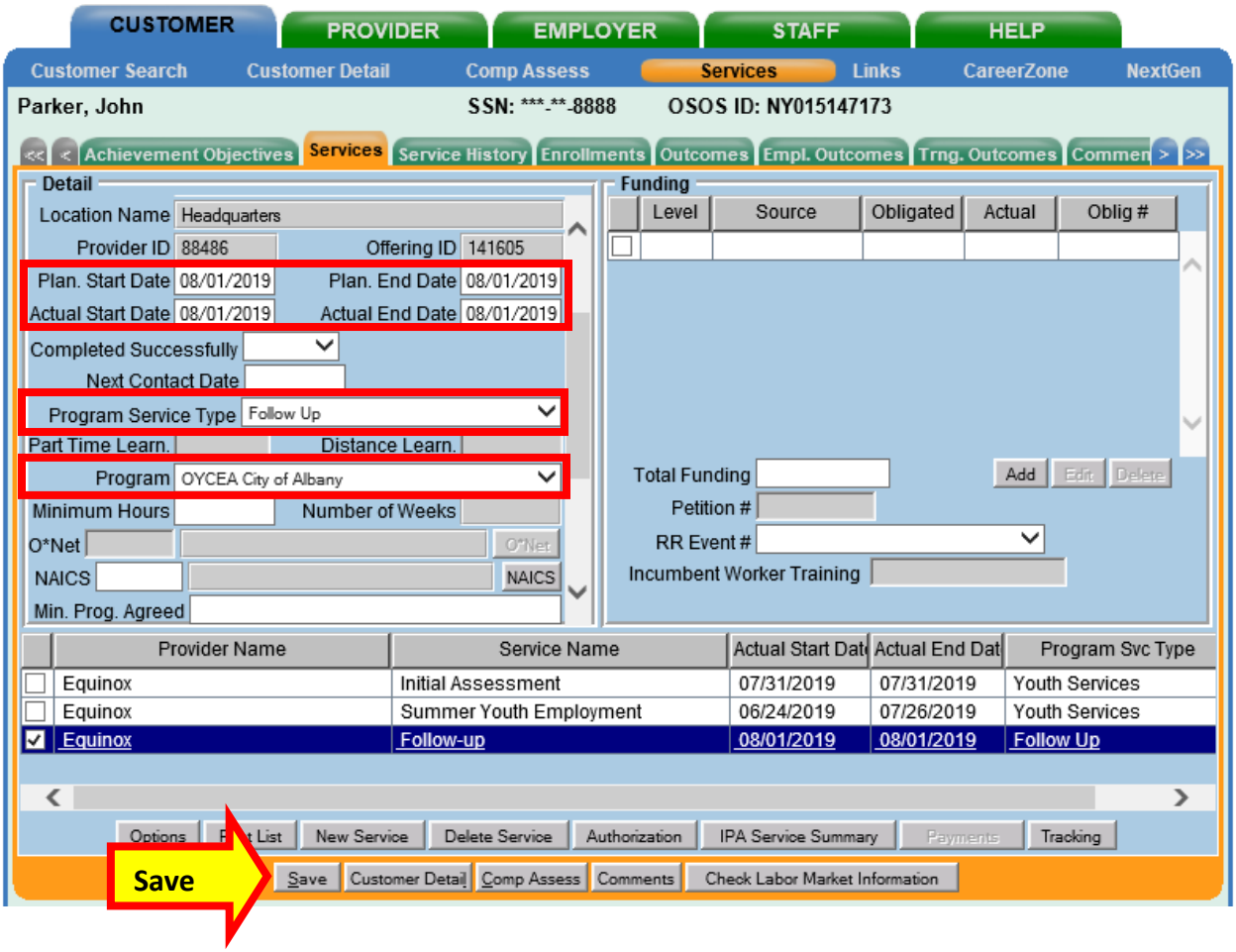


This brings you to the **Services** window, **Services** tab.

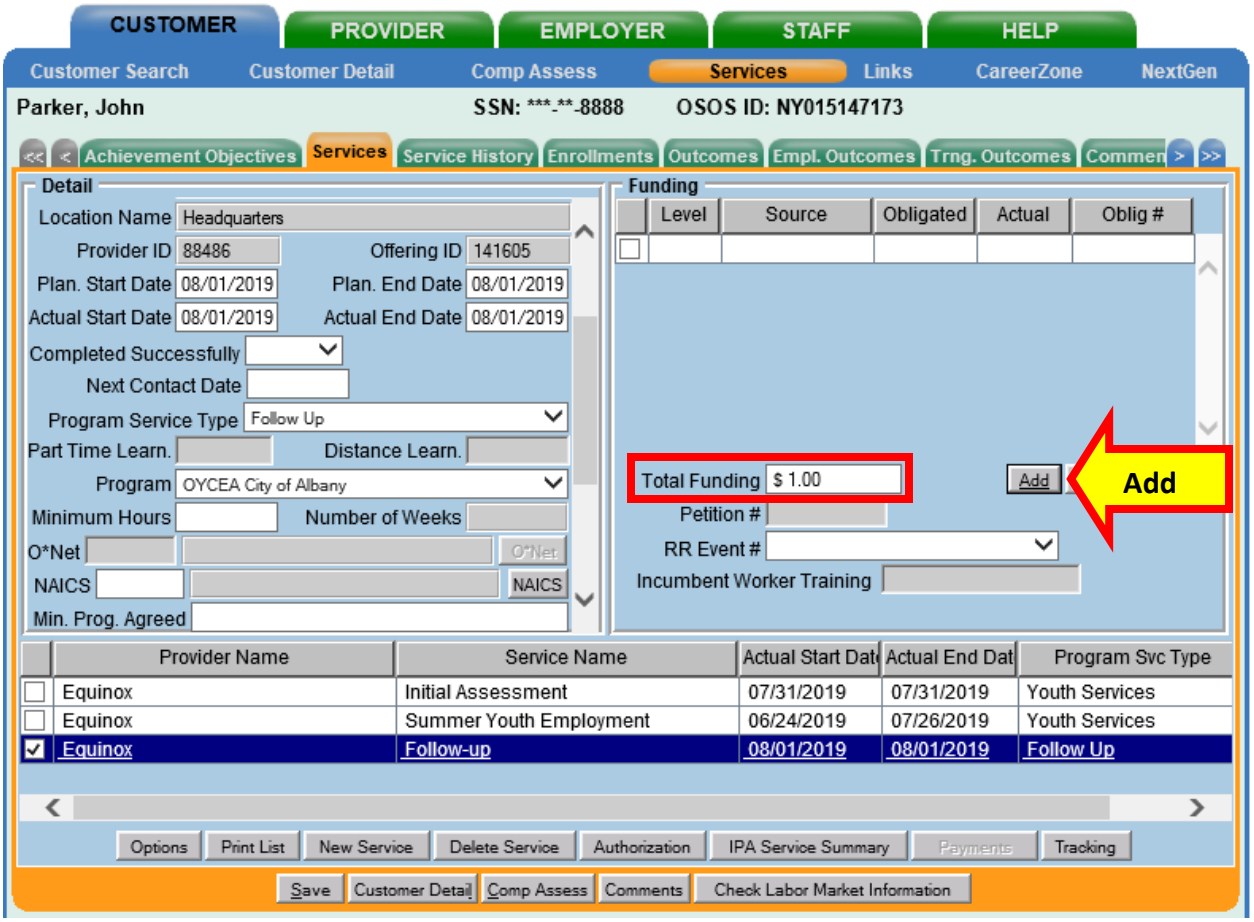
Enter **Plan. Start Date**, **Plan. End Date**, **Actual Start Date**, and **Actual End Date**. Then, select the **Program Service Type**. Last, select the appropriate **Achievement Objective** associated with this service.

*When entering follow up Services in OSOS, the **Program Service Type** is always **Follow up**. Also, is important to note that the **Actual Start Date** for the follow up service must be at least one day after the **Actual End Date** of the last enrolling/non follow up service.*

When this required information is entered, click the **Save** button at the bottom of the screen.

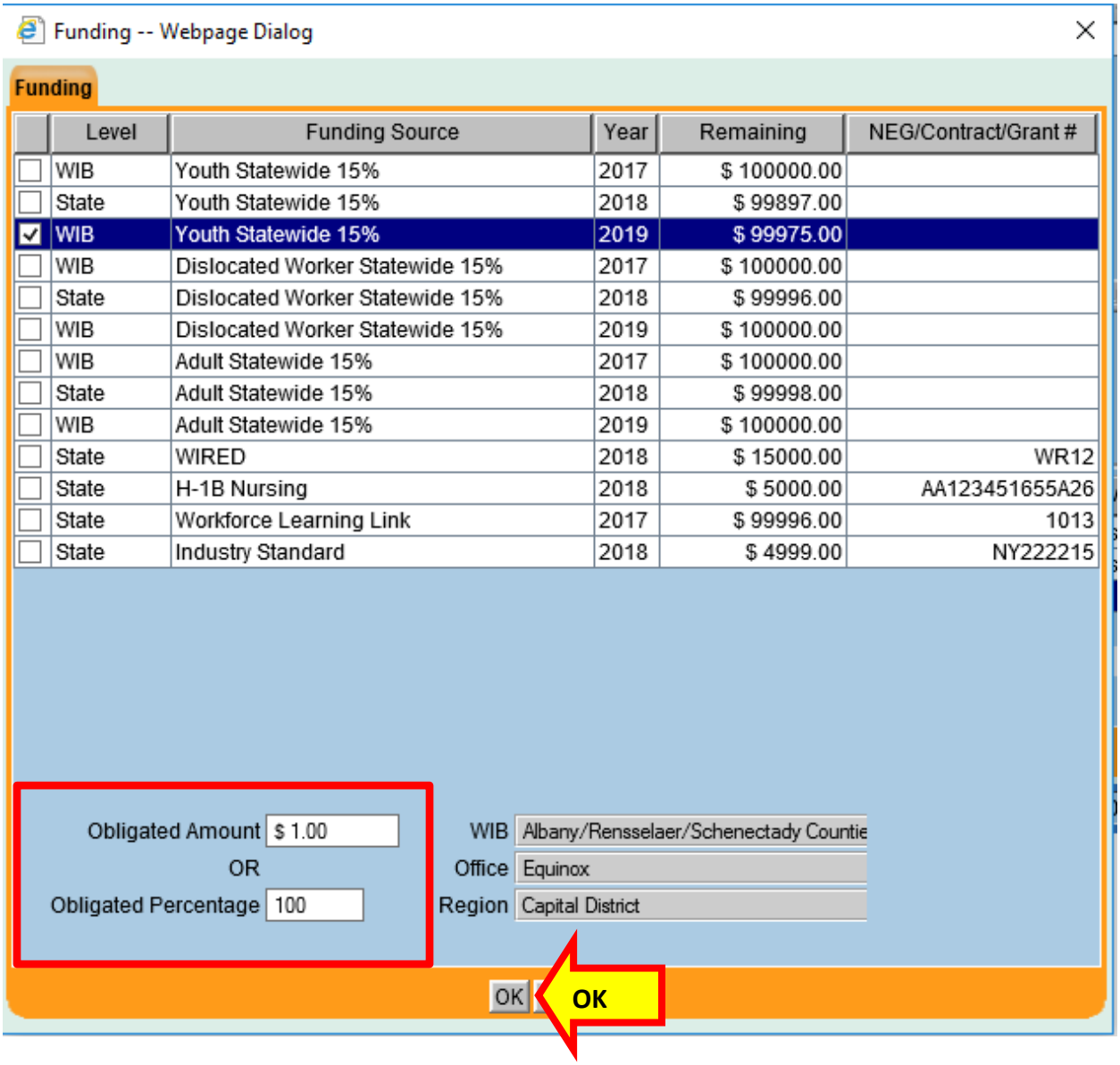


Next, you will attach the funding. Enter 1 into the **Total Funding** field. Then click the **Add** button.



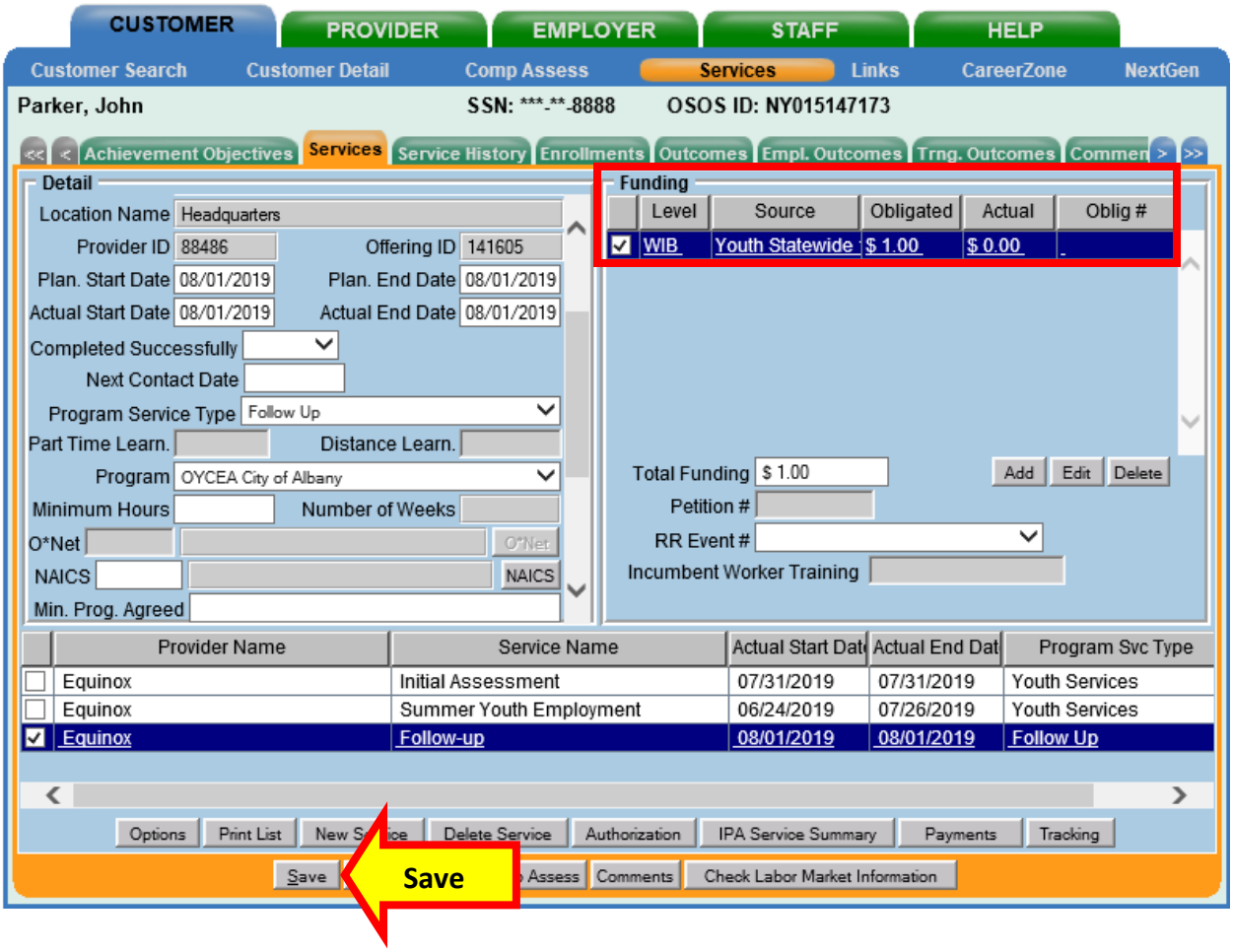
The **Funding Webpage Dialogue** box will open. For services that start prior to July 1, 2019, select **Youth Statewide 15%** funding for **2018**. For services that start July 1, 2019 or after, select **Youth Statewide 15%** funding for **2019**.

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



	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
☐	WIB	Youth Statewide 15%	2017	$ 100000.00	
☐	State	Youth Statewide 15%	2018	$ 99897.00	
☑	WIB	Youth Statewide 15%	2019	$ 99975.00	
☐	WIB	Dislocated Worker Statewide 15%	2017	$ 100000.00	
☐	State	Dislocated Worker Statewide 15%	2018	$ 99996.00	
☐	WIB	Dislocated Worker Statewide 15%	2019	$ 100000.00	
☐	WIB	Adult Statewide 15%	2017	$ 100000.00	
☐	State	Adult Statewide 15%	2018	$ 99998.00	
☐	WIB	Adult Statewide 15%	2019	$ 100000.00	
☐	State	WIRED	2018	$ 15000.00	WR12
☐	State	H-1B Nursing	2018	$ 5000.00	AA123451655A26
☐	State	Workforce Learning Link	2017	$ 99996.00	1013
☐	State	Industry Standard	2018	$ 4999.00	NY222215

The appropriate funding has now populated the **Funding** section. Click **Save** at the bottom of the screen.



*Enter a case note in the **Customer** module, **Customer Detail** window, **Comments** tab to provide details regarding the Follow up service.*

RESOURCES AND ASSISTANCE

OYCEA RFP

NYSDOL Programs and Tools Website

Performing a Customer Search OSOS Guide

Creating a Basic Customer Record OSOS Guide

Comprehensive Assessment & Supplemental Data Guide

High Poverty Area Guidelines

Military Service Questionnaire

Writing an Effective Youth Program Case Note 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