Sector Partnership National Emergency Grant - Incumbent Worker Training OSOS Guide

3/27/2018

TABLE OF CONTENTS

Purpose 1
Participant Data Entry 2
Record the Service 2
Add Funding 13
Enter Comments 16
Enter Outcomes 17
Resources and Assistance 20

PURPOSE

The purpose of the Sector Partnership National Emergency Grant (SP-NEG) Incumbent Worker Training (IWT) is to promote partnerships between private sector businesses, Local Workforce Development Boards (LWDB), and education and training providers in priority industries as determined through the Regional Economic Development Council's strategic planning process. This grant will support and invest in businesses seeking to provide occupational skill based trainings to underemployed incumbent workers. These funds will assist participating businesses to advance their incumbent workers to more skilled positions leading to promotions, increased pay, or increased earnings through more work hours. Vacant positions, due to incumbent worker advancement, will then be back filled in accordance with a plan to engage and market to new, qualified participants in an associated dislocated worker program.

OSOS is a case management system designed to record a process in which services are provided to jobseekers and employers. This process 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 its success in achieving the desired goals.

This guide will provide detailed instructions on how to conduct the OSOS data entry for the SP - NEG IWT Initiative.

For additional information the SP-NEG IWT:
Request for Applications - Sector Partnership-NEG Incumbent Worker Training

PARTICIPANT DATA ENTRY

Under the Incumbent Worker Training grant, funds are to be used to assist businesses with the expense of providing occupational skills training for incumbent workers. Training may take the form of on-site training, off-site training, or distance learning.

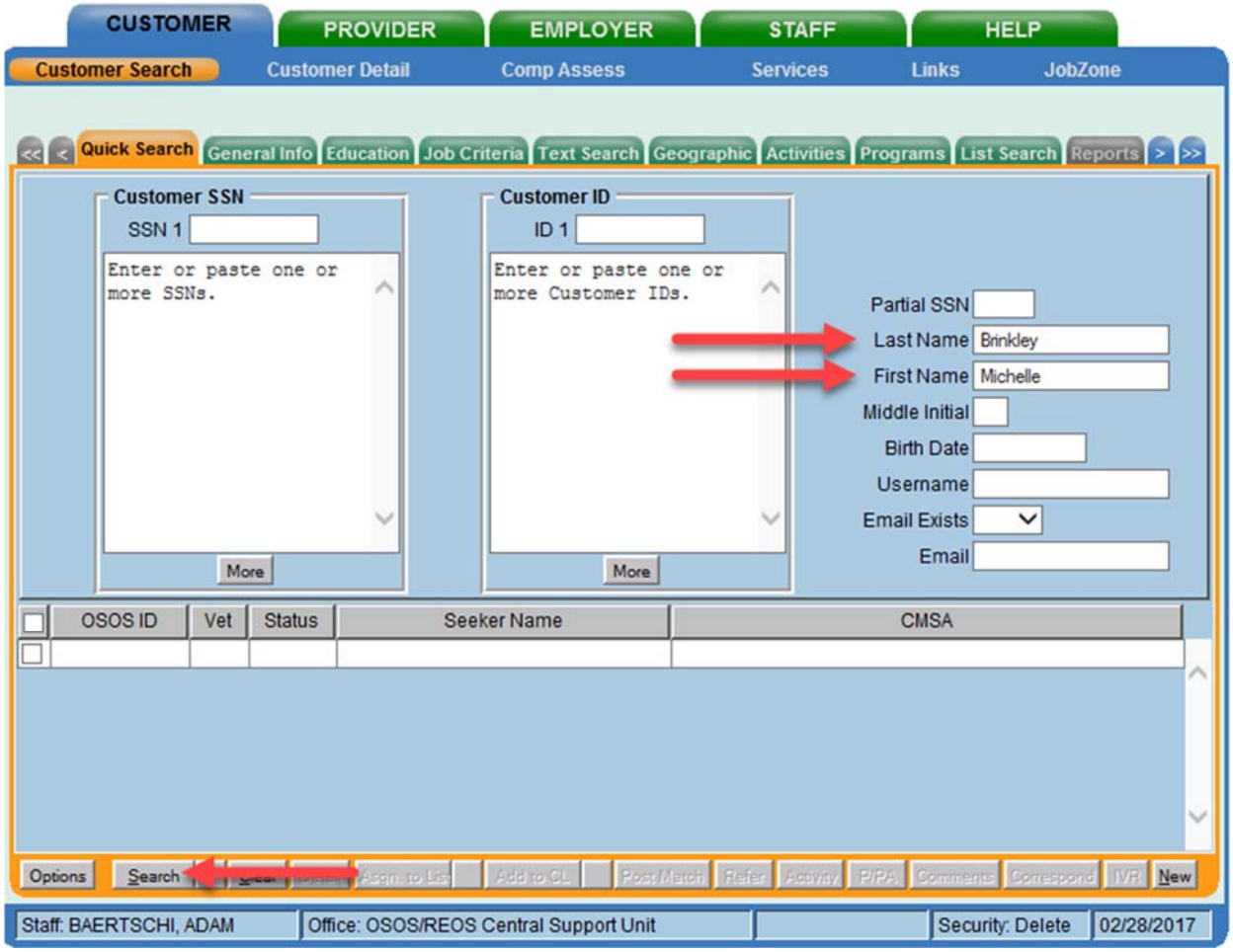
The provision of this training must be recorded in OSOS.

RECORD THE SERVICE

After ensuring that the training provider information is in OSOS, staff must record participant data relevant to the services being provided.

Start by conducting a Customer Search in the **Customer** module, **Customer Search** window, and **Quick Search** tab.

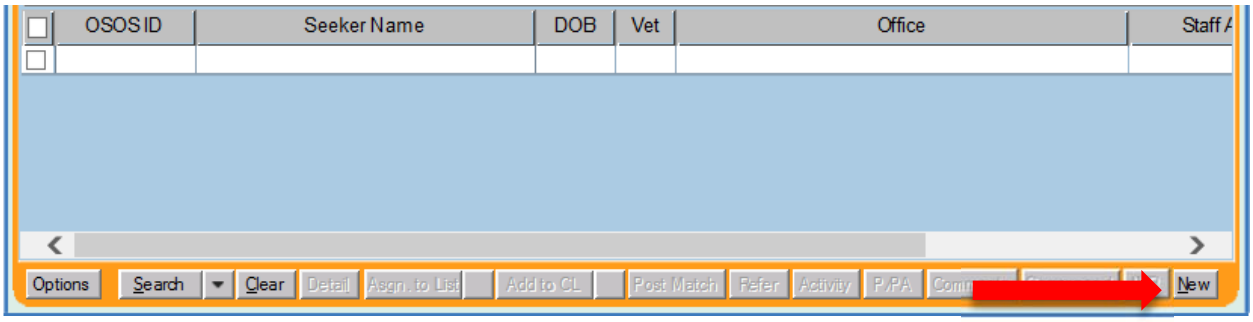
Search for the customer by Last Name and First Name. Once you find the customer's record in OSOS you may use the customer's NY ID number for any subsequent customer search.



If a customer 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.

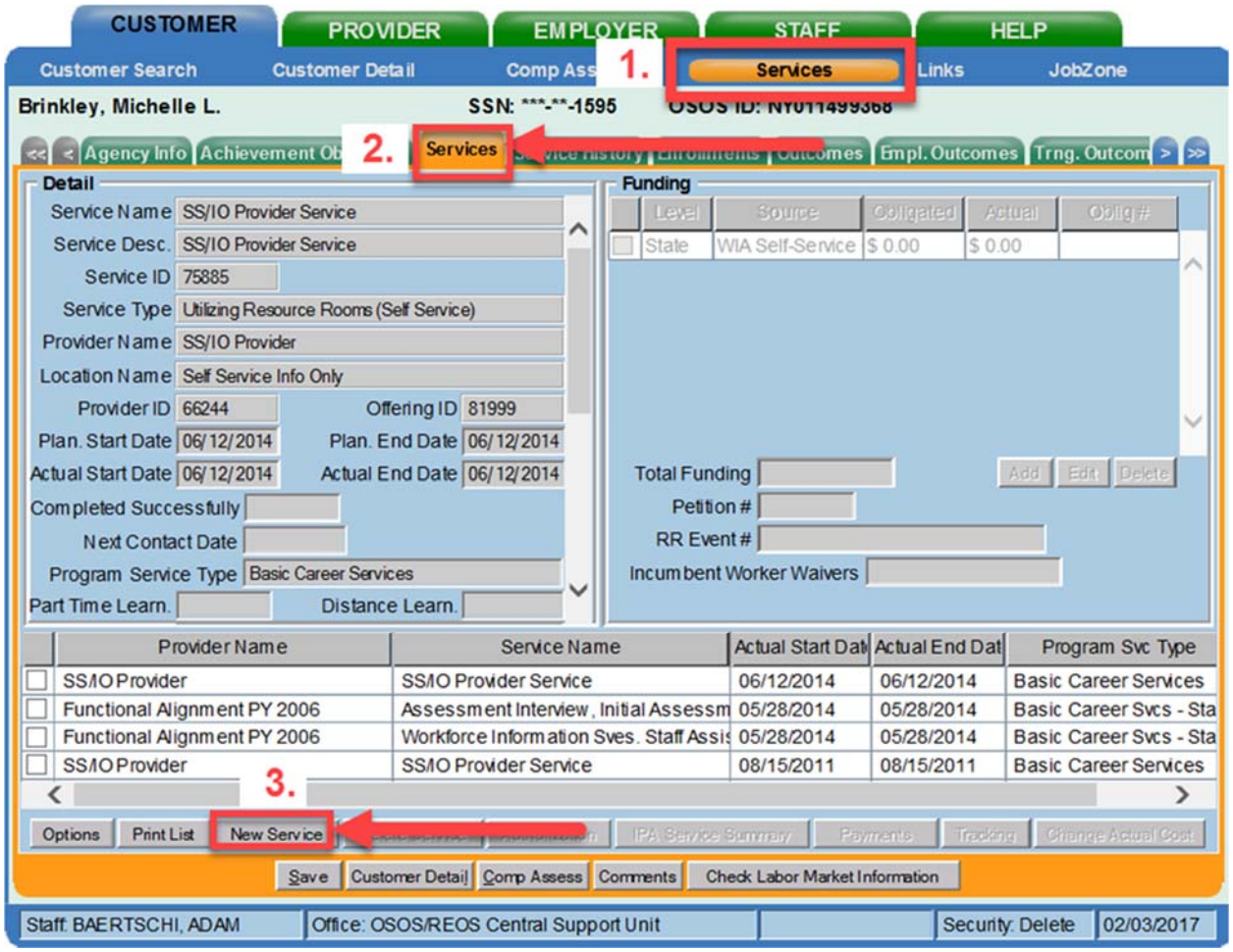
If no matches are found, you will need to create a new record for the customer in OSOS, as incumbent workers served under this grant must be registered with NYS's Career Centers.

To do this, click **New** at the bottom of the screen and fill in the necessary details in the **Customer Detail** tabs.



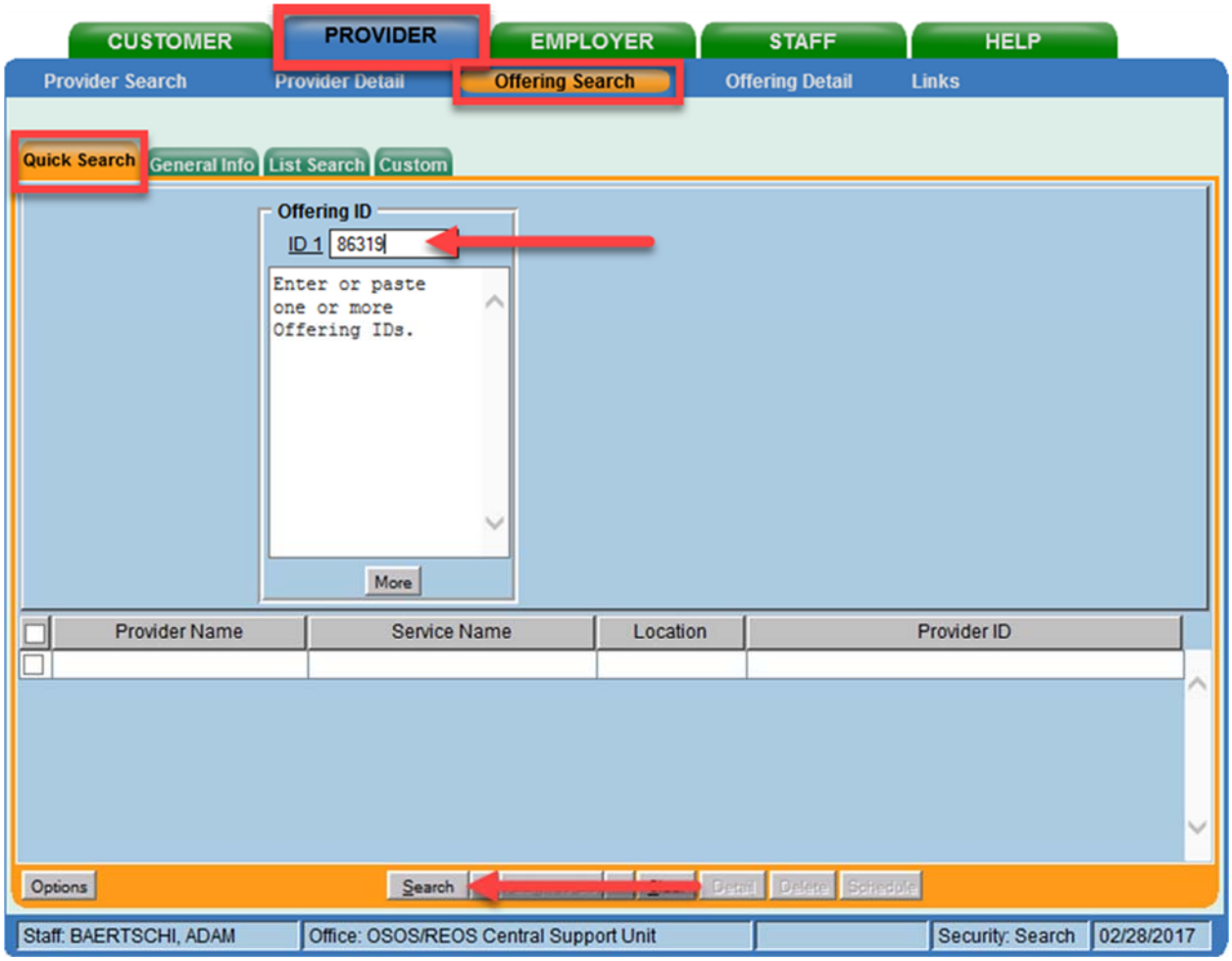
Once in the correct customer record, navigate to the **Services** (1) window and then the **Services** tab (2) of the customer record.

Click the **New Service** (3) button at the bottom.



After you click the **New Service** button, OSOS will automatically navigate to the **Provider** module. Within the **Provider** 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**.

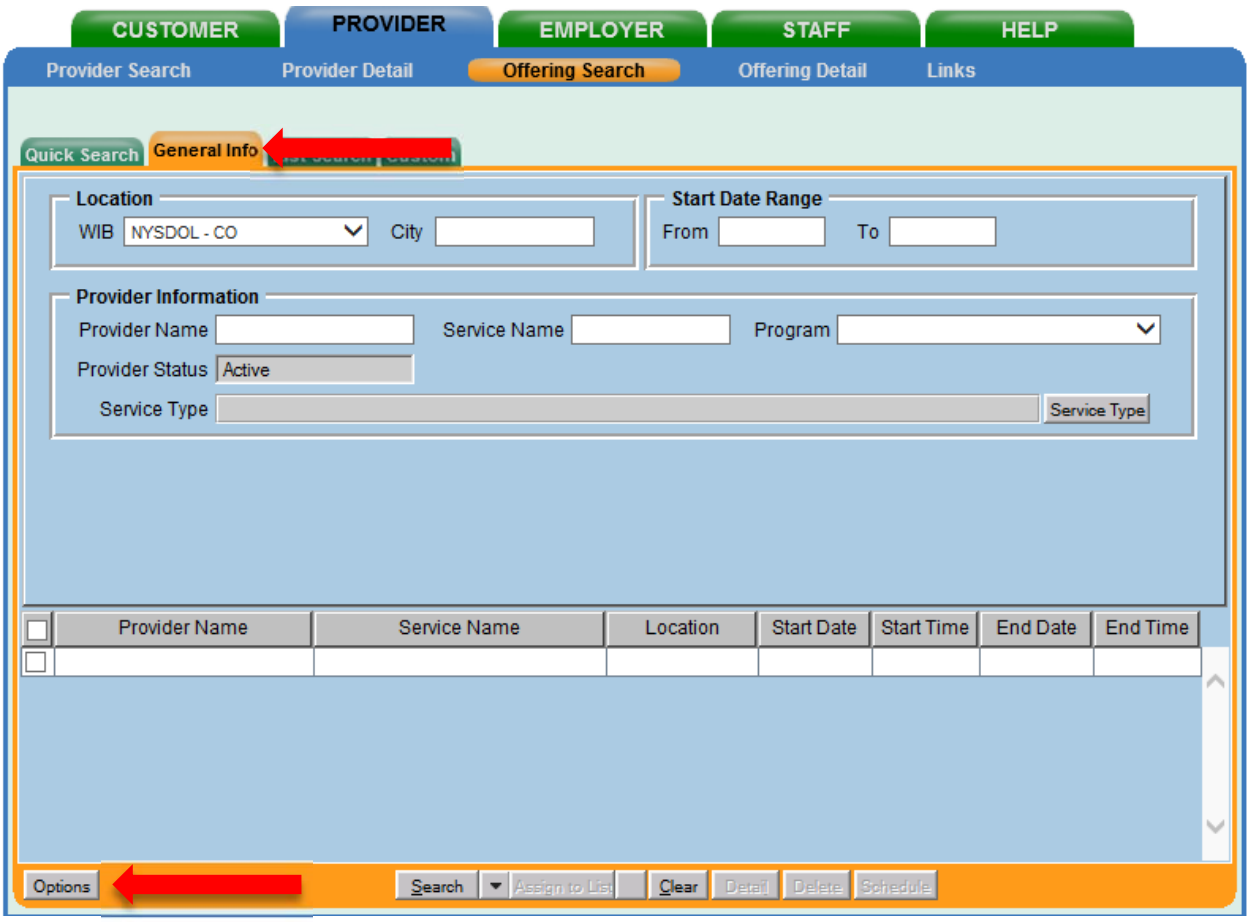


If you do not know the **Offering ID**, click the **General Info** tab to search by other criteria.

In order for Occupational Skills Training to be funded through the IWT grant, the training provider/service must have been auto-loaded into OSOS from the Eligible Training Provider List (ETPL).

To help you determine whether or not a particular provider has been auto-loaded from the ETP, the search options should be adjusted before conducting the search.

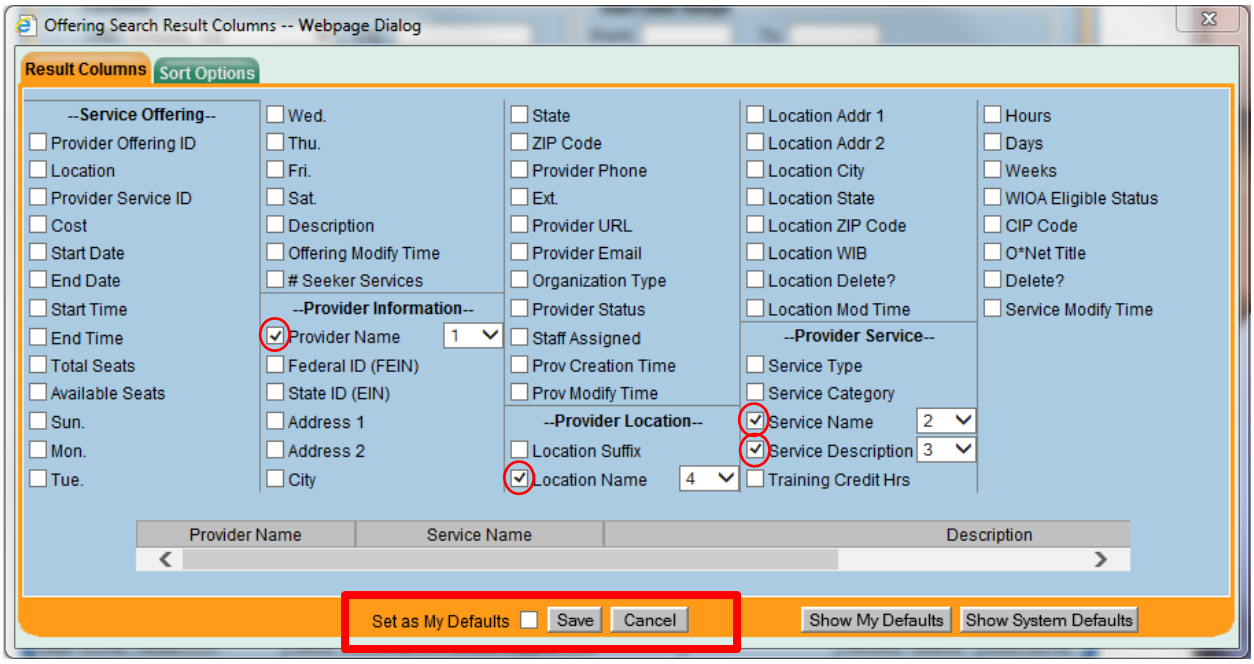
To do this, click on **Options** at the bottom of the screen.



A pop-up window will appear containing a list of categories you can choose to display for your search results. Select the following four categories: Provider Name, Service Name, Location Name, and Service Description.

Uncheck any other categories that may already be checked and click **Save**.

Adding the Service Description to the search options is the key to allow you to easily determine ETPL origination.



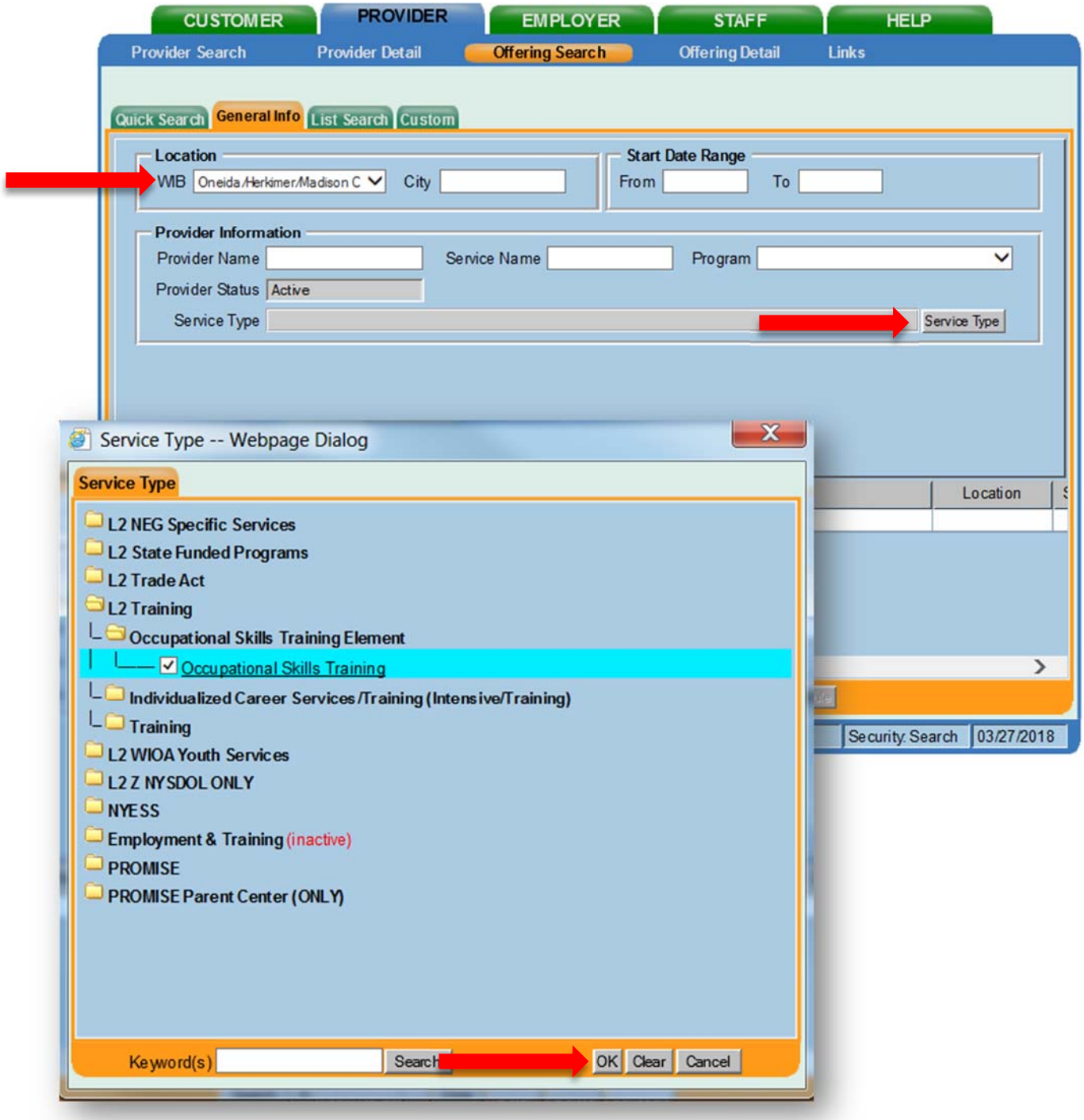
*You can check the box to "**Save My Defaults**" before you save so that you do not have to set these options each time you conduct a search.*

Now that the options have been customized, select the **WIB.**

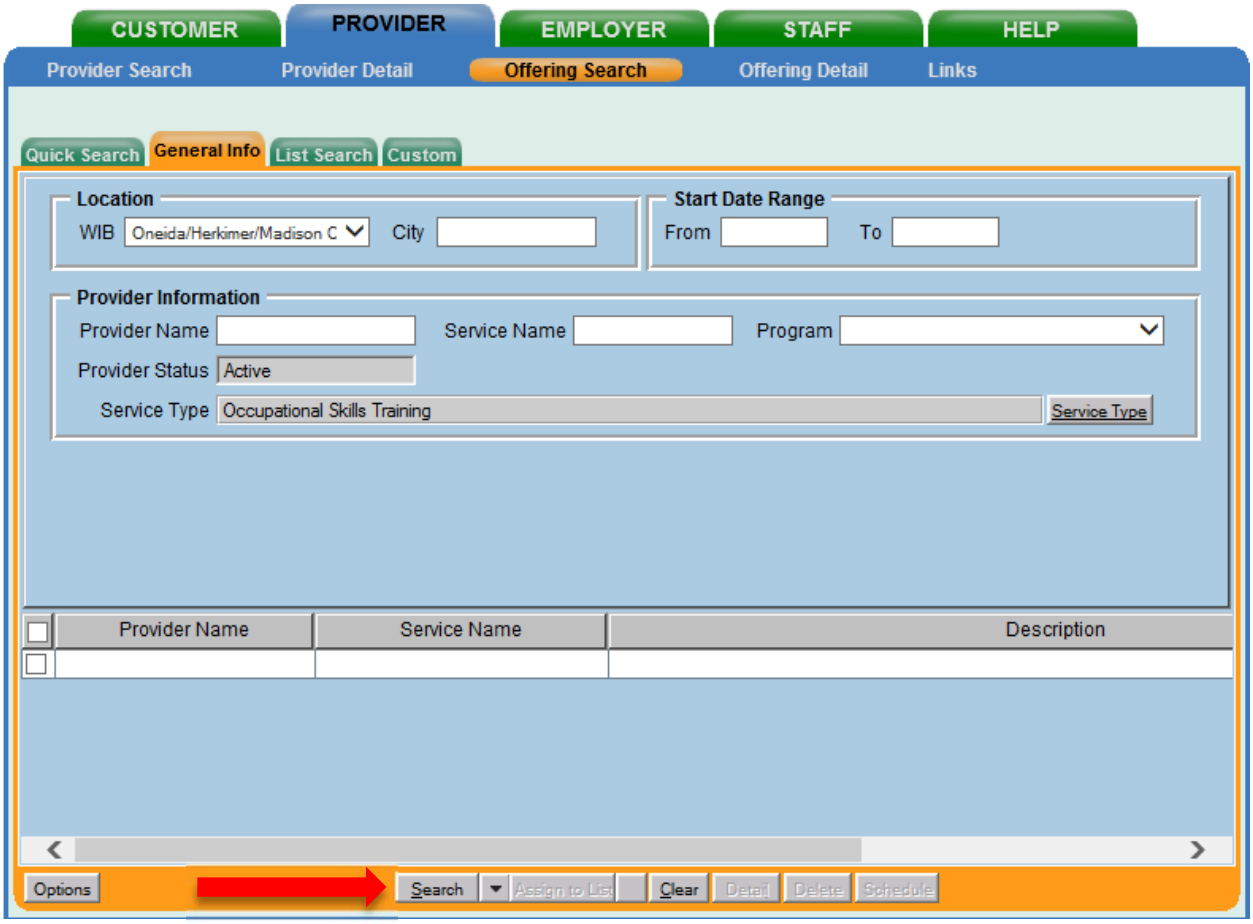
Enter any known information in the available data fields. OSOS allows you to enter a partial name for the **Provider Name**, **Service Name** fields.

Click **Service Type**.

Select the appropriate Service Type from the pop-up dialog box. Click **OK.**

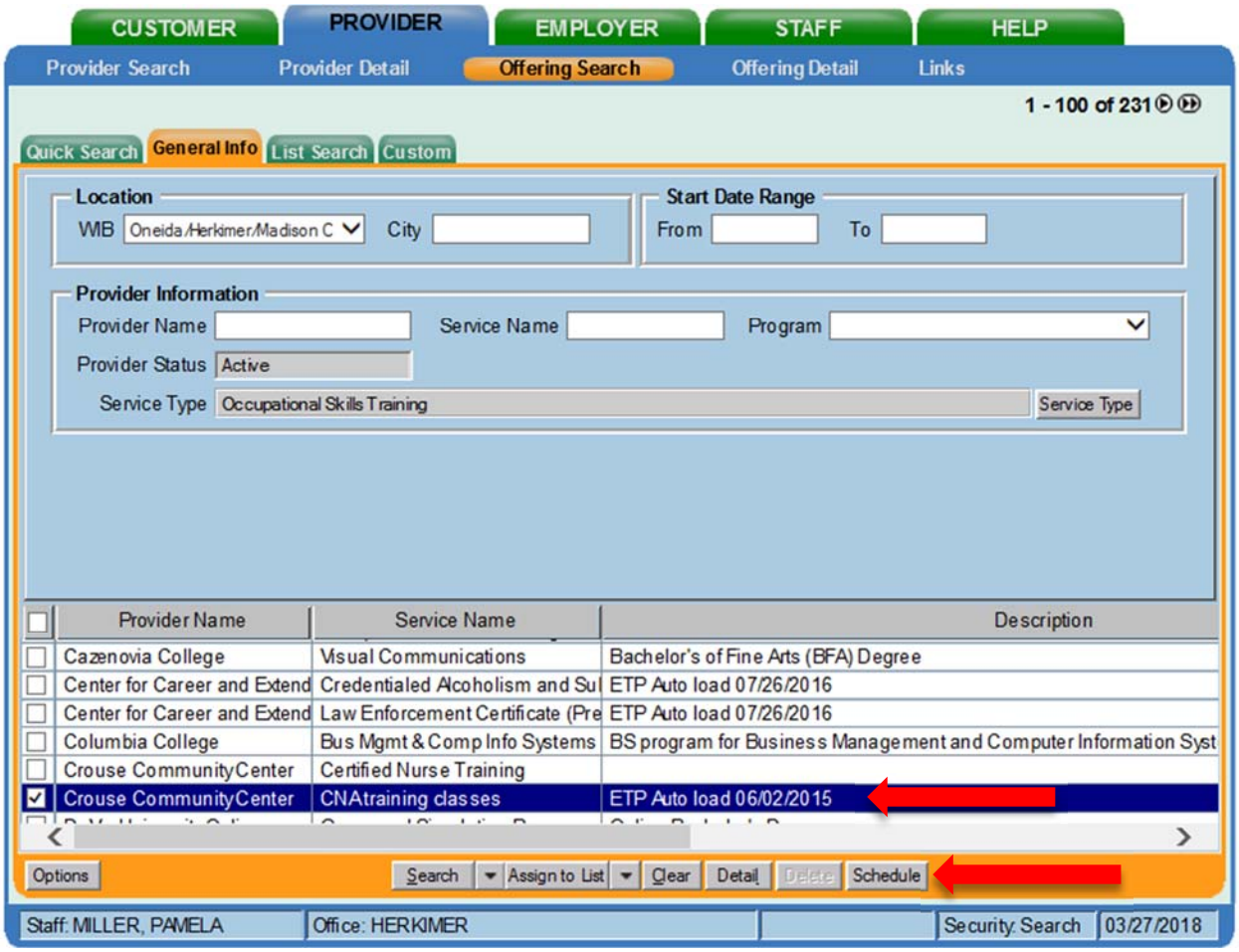


Once the search criteria have been entered, click **Search**.

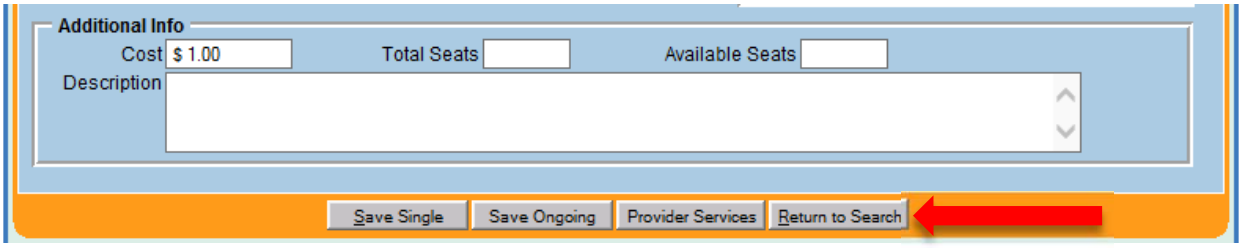


The results will display in the bottom half of the screen. Note that the Description field will include "ETP Auto load" if the training has originated from the ETPL.

Select the correct Provider/Service from the results and click **Schedule.**

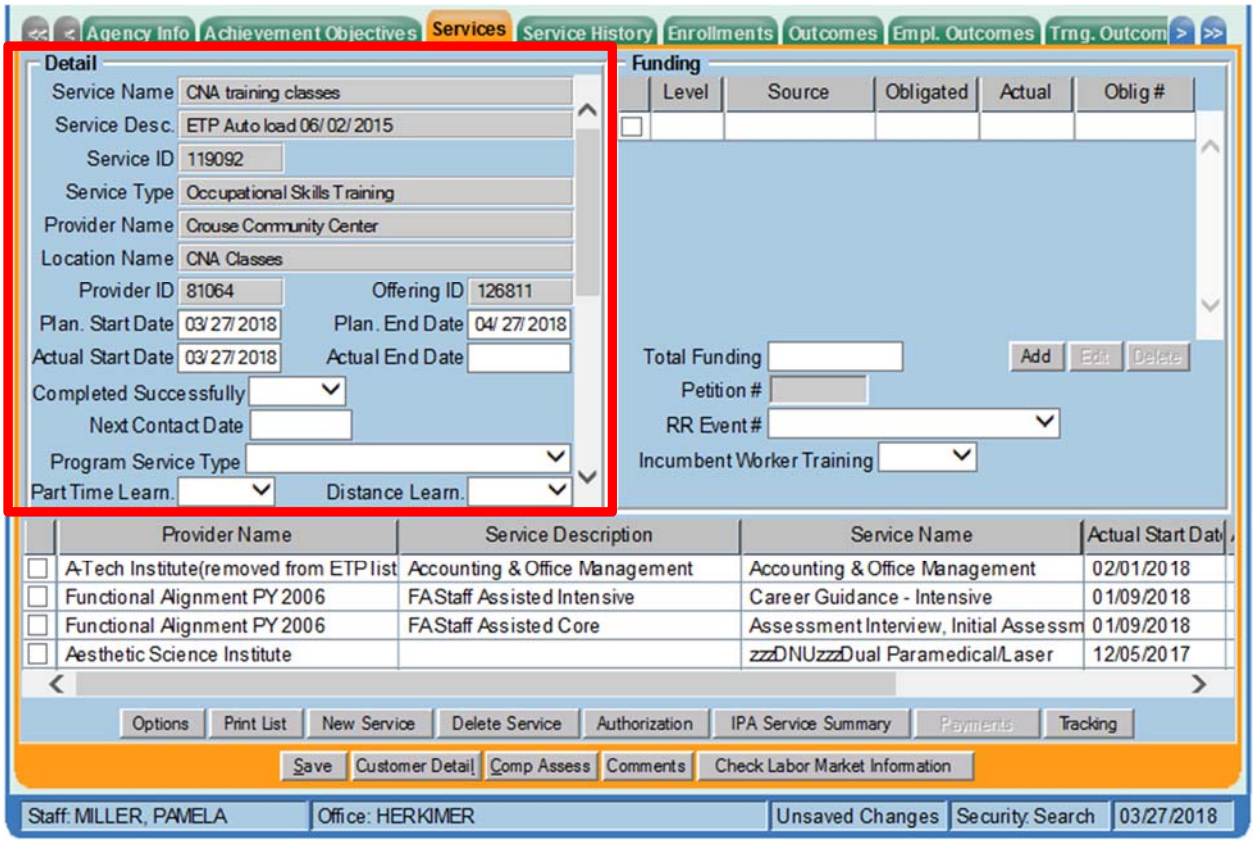


*If your search only returns one result, OSOS will navigate directly to the **Offering Detail** window for that provider. Click the **Return to Search** button at the bottom of the screen to navigate back to the **General Info** tab. This will allow you to schedule the service.*



By clicking **Schedule**, the service will be added to the customer's record, under the **Services** tab. OSOS will navigate to the **Services** tab automatically.

Select the service from the list in the bottom half of the screen 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 began

Actual End Date – This field can be left blank until the service ends. If the service is a one day service, 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 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 – Enter the appropriate O*NET code. If you do not know the O*NET code, refer to O*NET Titles in OSOS Guide.

Staff Assigned—Click the "**Change**" button to enter the staff assigned to this participant. You may choose the down arrow and select "Assign to Me" if you are the staff member assigned to this participant.

WIB Assigned, Agency, Office – These fields will auto load information attached to the service. If the information is incorrect, click the **Change Office** button to update.

*Depending on the type of service you enter, some of the fields in the **Detail** section will not apply. As a rule, provide as much known information about the service as possible.*

ADD FUNDING

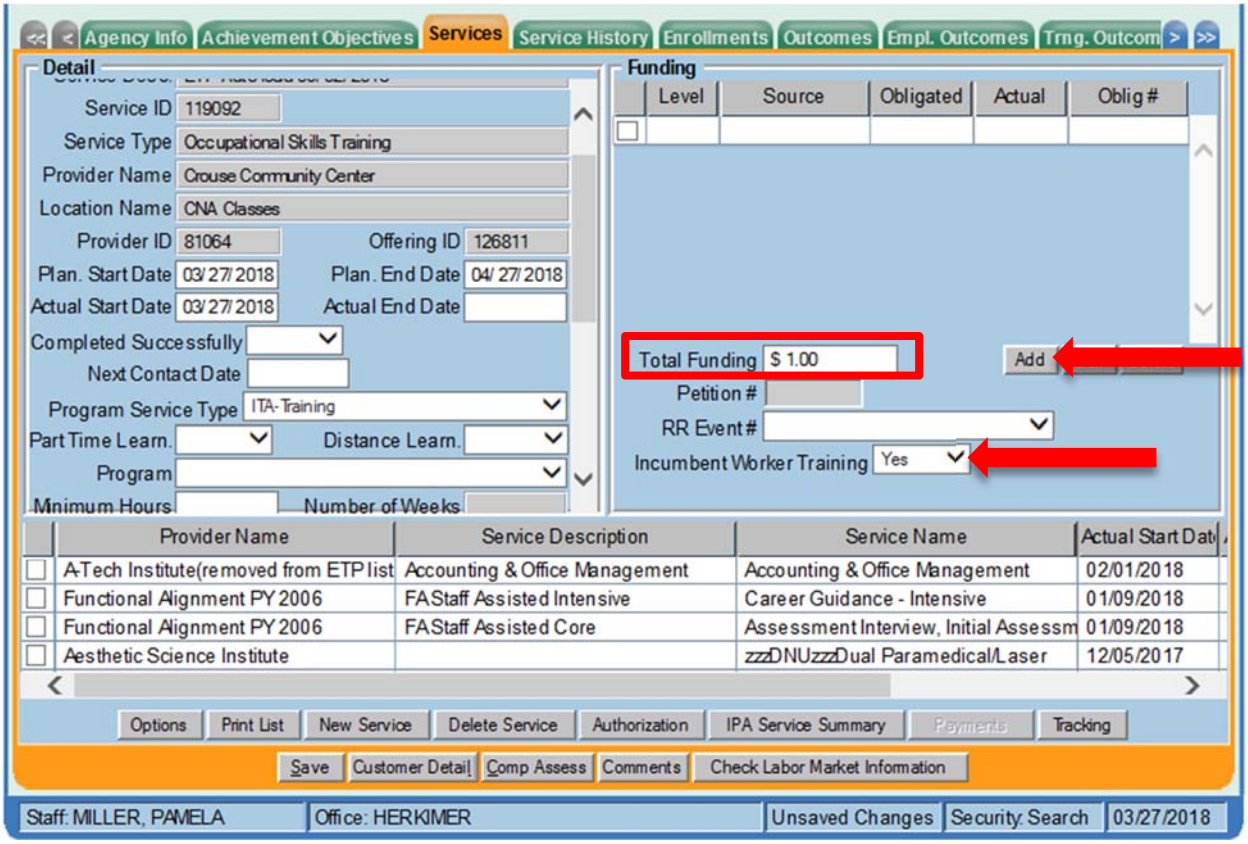
Next, complete the **Funding** section (right hand side) for the service

To do this, enter $1.00 in the **Total Funding** field.

Select **Yes** from the **Incumbent Worker Training** drop-down menu.

Click the **Add** button.

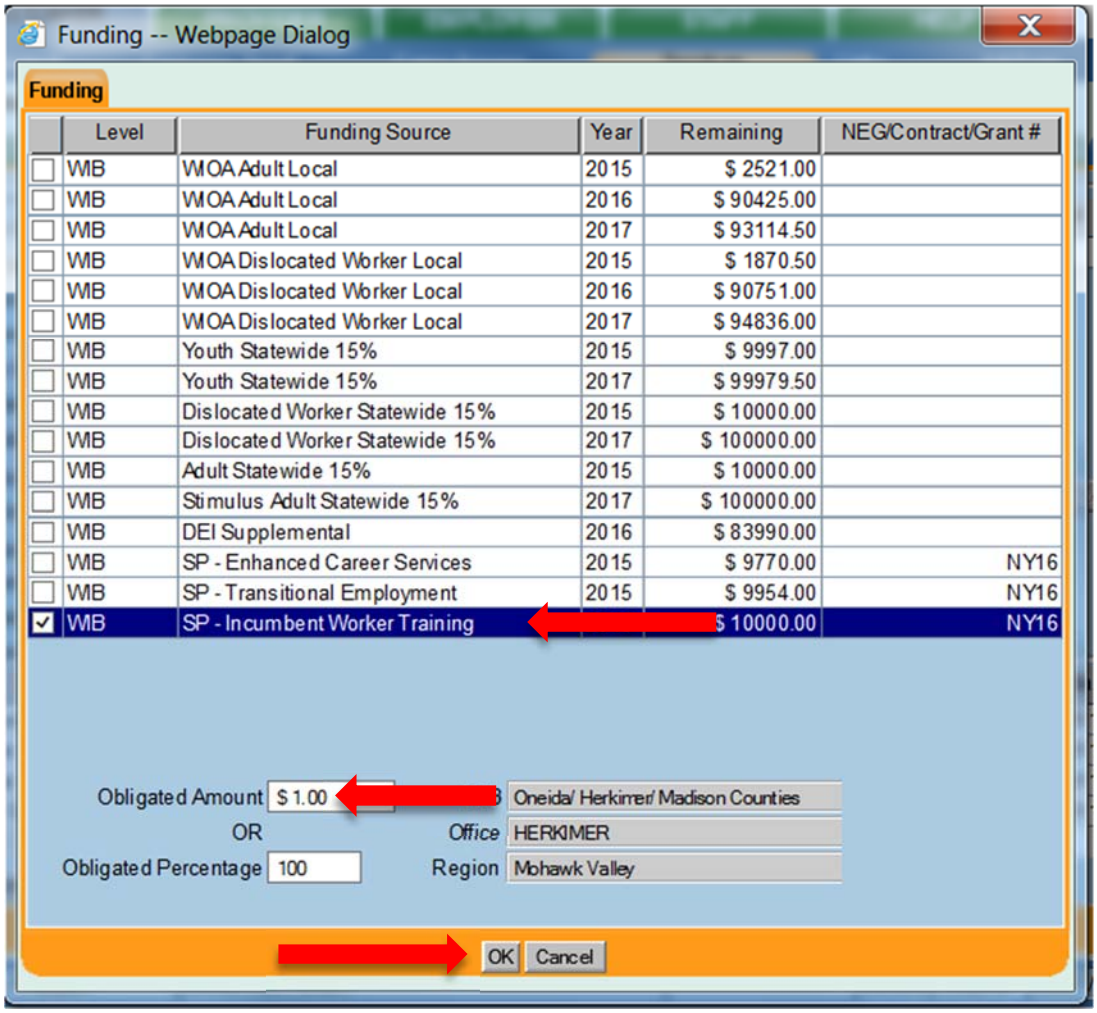
OSOS does not track the actual financial side of this grant. For that reason, the $1.00 entry acts as a placeholder so that the system will allow a funding source to be attached to the service.



After you click **Add**, a pop up window will appear with a list of funding sources.

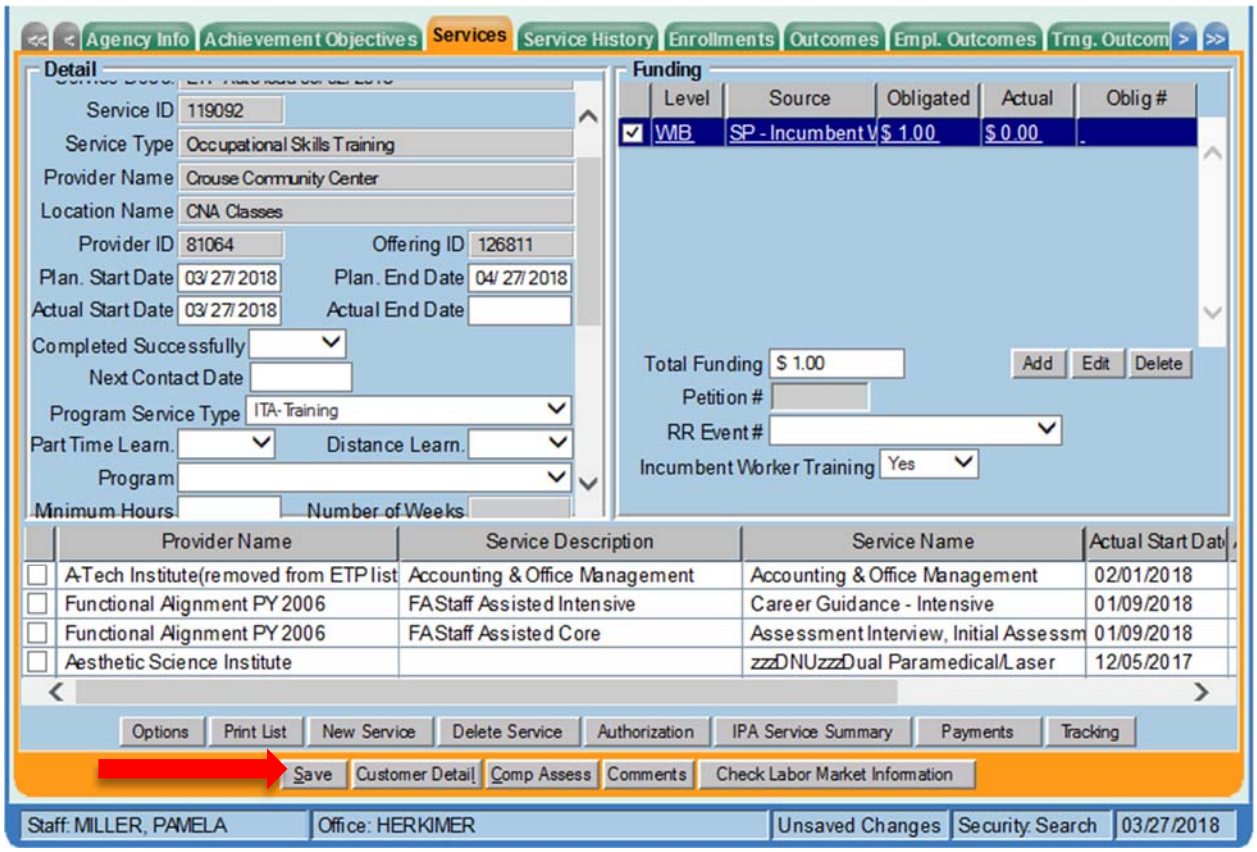
Check the box next to **SP - Incumbent Worker Training** to select that funding source.

Enter **$1.00** in the **Obligated Amount** field and click **OK.**



The funding will now appear in the **Funding** section on the right-hand side.

Click **Save** at the bottom of the screen.

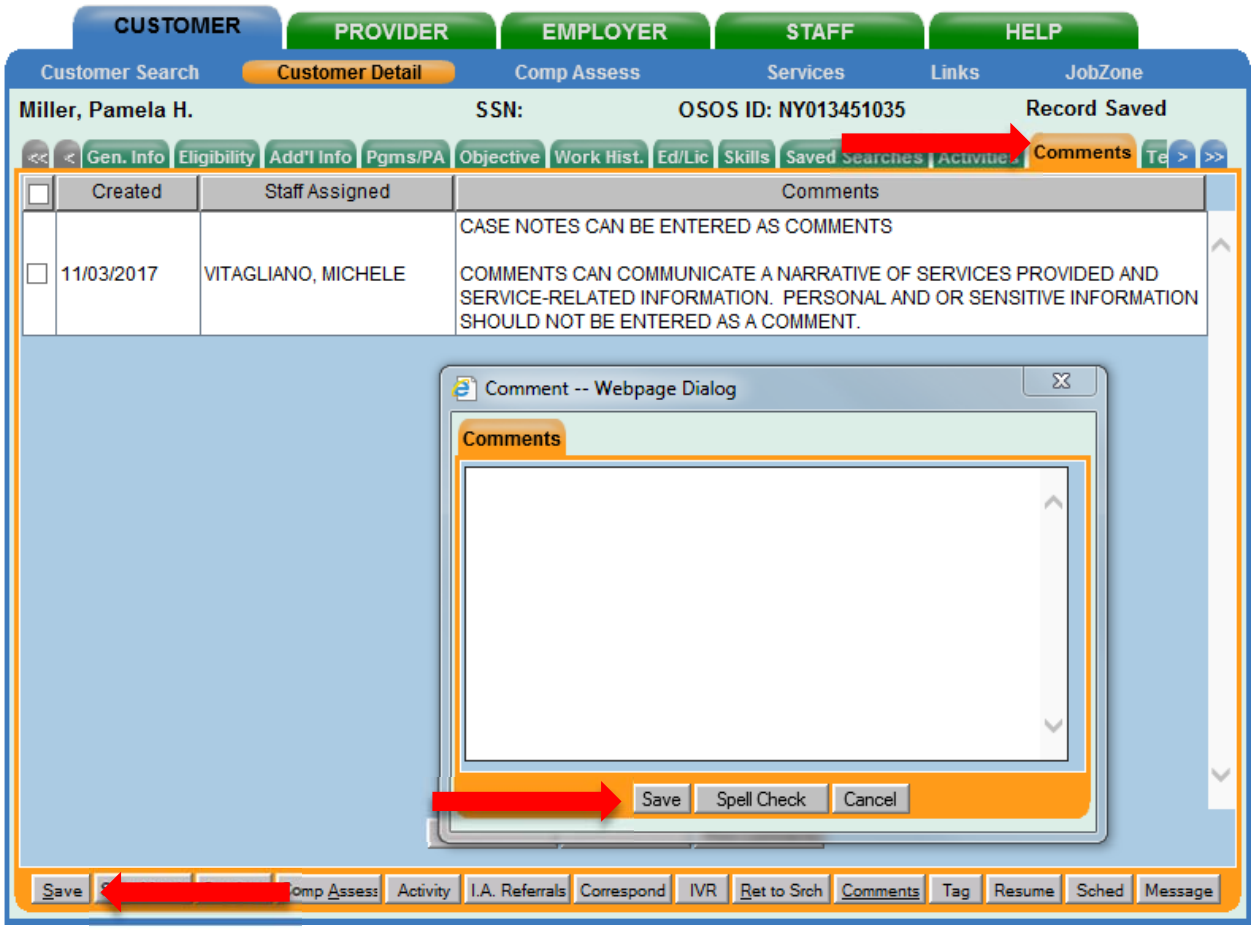


ENTER COMMENTS

Comments are used to record case management notes. All users should record comments, details about services, and case notes that concern the customer being served.

Click on the **Comments** button at the bottom of the **Customer Detail** window. The **Comment 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.

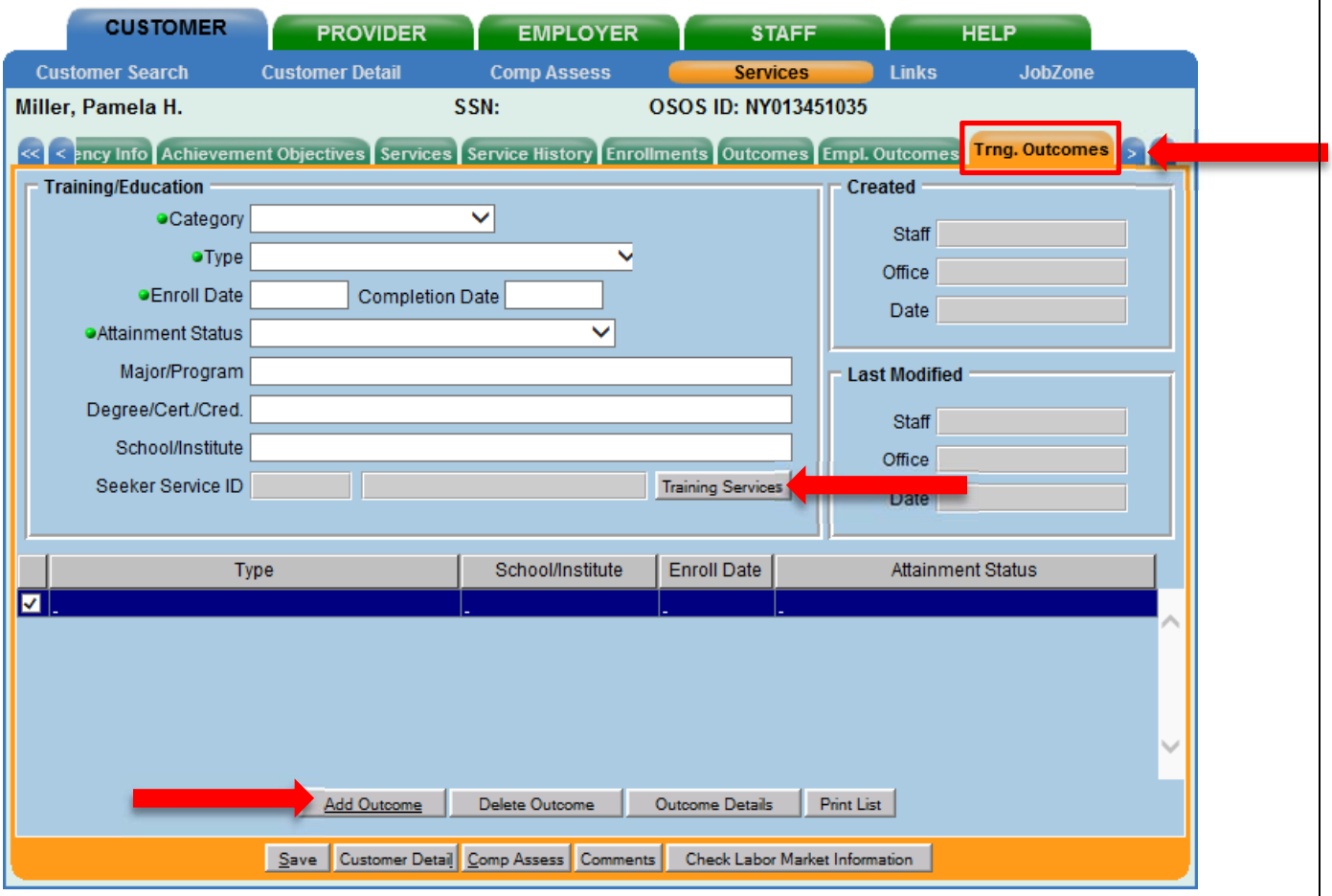


ENTER OUTCOMES

When a customer exits an enrollment (90 days after the last recorded enrolling service or activity), you must enter a training/service outcome. To enter the outcome, navigate to the **Services** window of the **CUSTOMER** module. Click on the single right arrow until the display window shows the **Trng. Outcomes** tab.

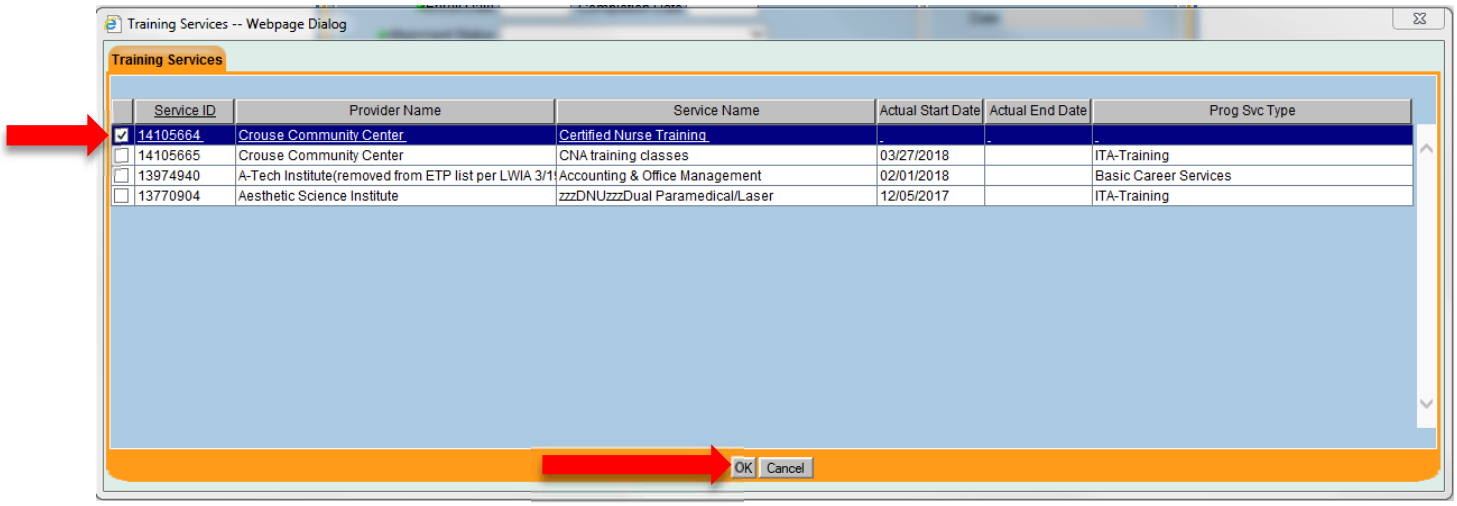
Click on **Add Outcome** at the bottom of the screen.

Then click on the **Training Services** button.



From the Training Services dialog box, select the SP-NEG funded service.

Click **OK**.



This will populate the Seeker Service ID in the Training Outcomes tab.

Select **Occ Skills/ Advanced Training** from the **Category** drop-down menu.

Select the appropriate credential type from the Type drop-down menu.

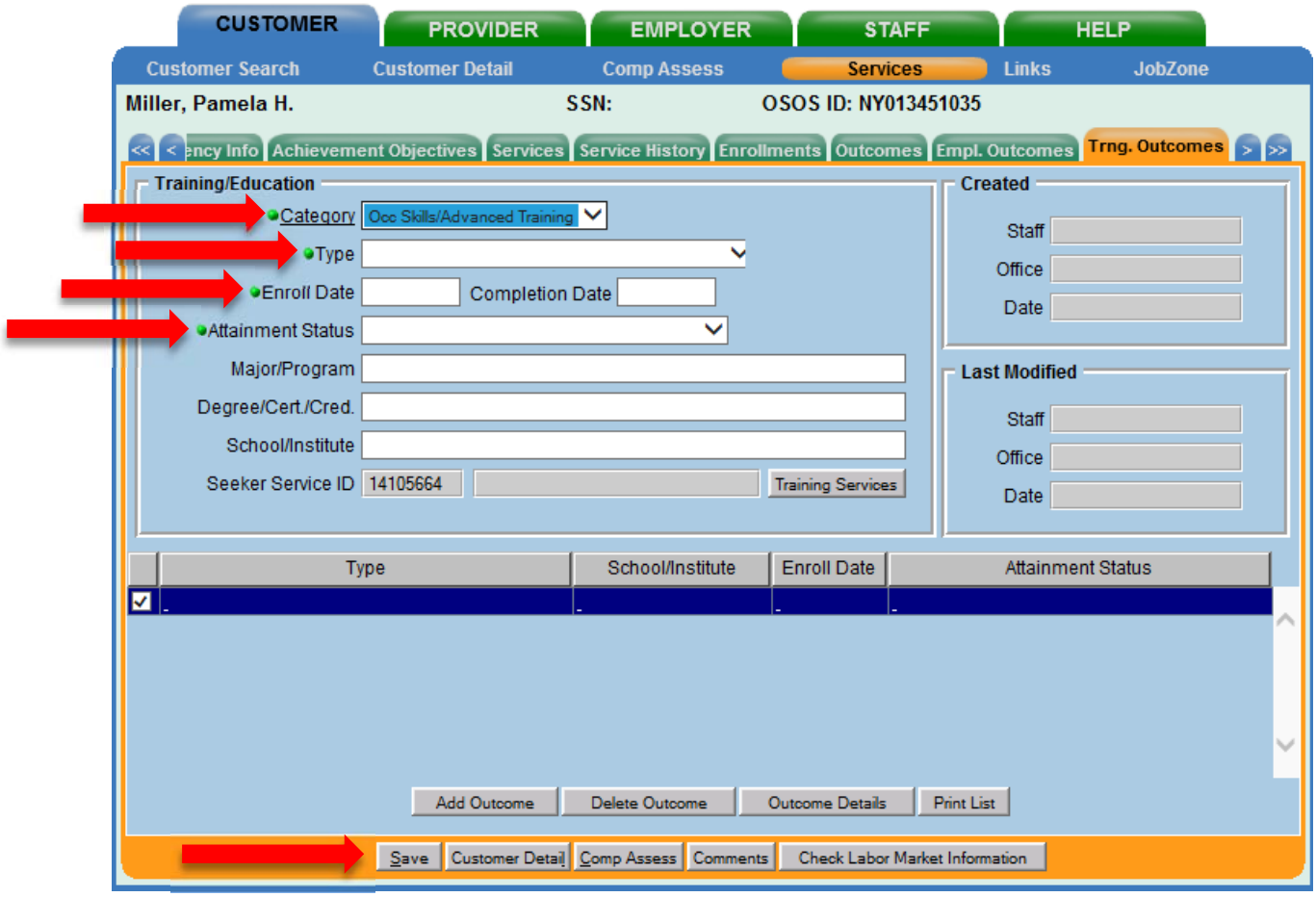
Enter the **Enroll Date** for the training.

Select the appropriate status from the **Attainment Status** drop-down menu.

If additional information is known, it should be entered in the remaining fields.

Click **Save**.

For additional information on entering outcomes, please see [OSOS Resources and Guides](#).



RESOURCES AND ASSISTANCE

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

https://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