Sector Partnership National Emergency Grant - Work Based Training Initiative OSOS Guide

3/27/2018

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PURPOSE

The purpose of the Sector Partnership National Emergency Grant Work-Based Training Initiative (SP -NEG WBT Initiative) is to promote partnerships between private sector businesses, Local Workforce Development Boards (LWDBs), and education and training providers in priority industries as determined through the Regional Economic Development Council's strategic planning process. It will support and invest in businesses seeking to empower dislocated workers to reconnect to the workforce through work-based training opportunities. Funds will support businesses that provide work-based training programs, such as on-the-job training (OJT), apprenticeships, or unpaid occupational skill based training to dislocated workers seeking employment in priority industries.

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 WBT Initiative. It will cover data entry for the service provider, as well as data entry for the participant.

For additional information the SP-NEG WBT Initiative:
SP-NEG WBT Questions and Answers Pertaining to the Request for Applications

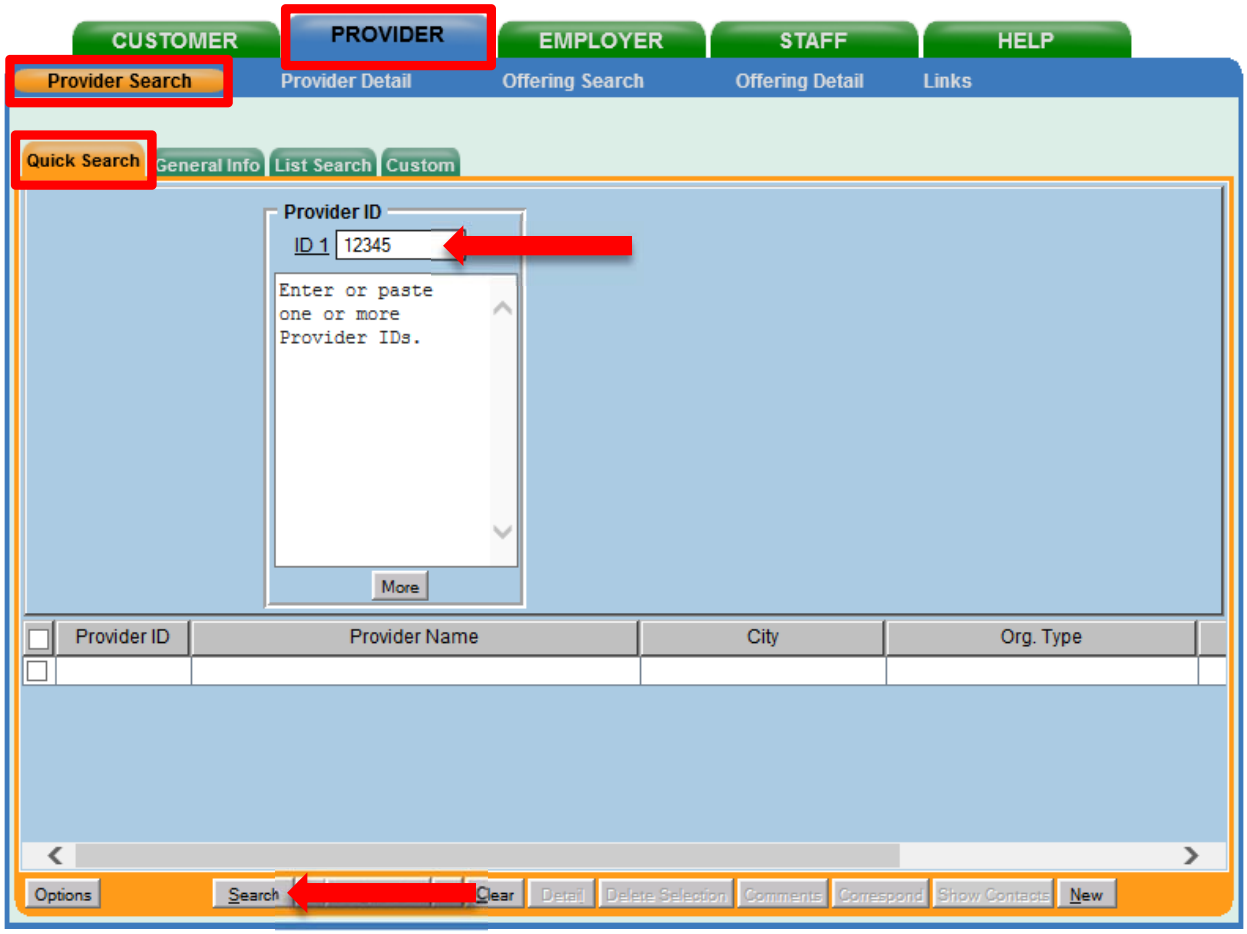
Request for Applications - Sector Partnership-NEG Work-Based Training Initiative

PROVIDER DATA ENTRY

In order to record the provision of training programs in OSOS, there must first be a provider record. Some providers may already have a provider record in OSOS, having been auto-loaded from the Eligible Training Provider List (ETPL). If the provider is not already listed, the local area must create the provider record in OSOS.

CREATING A PROVIDER RECORD

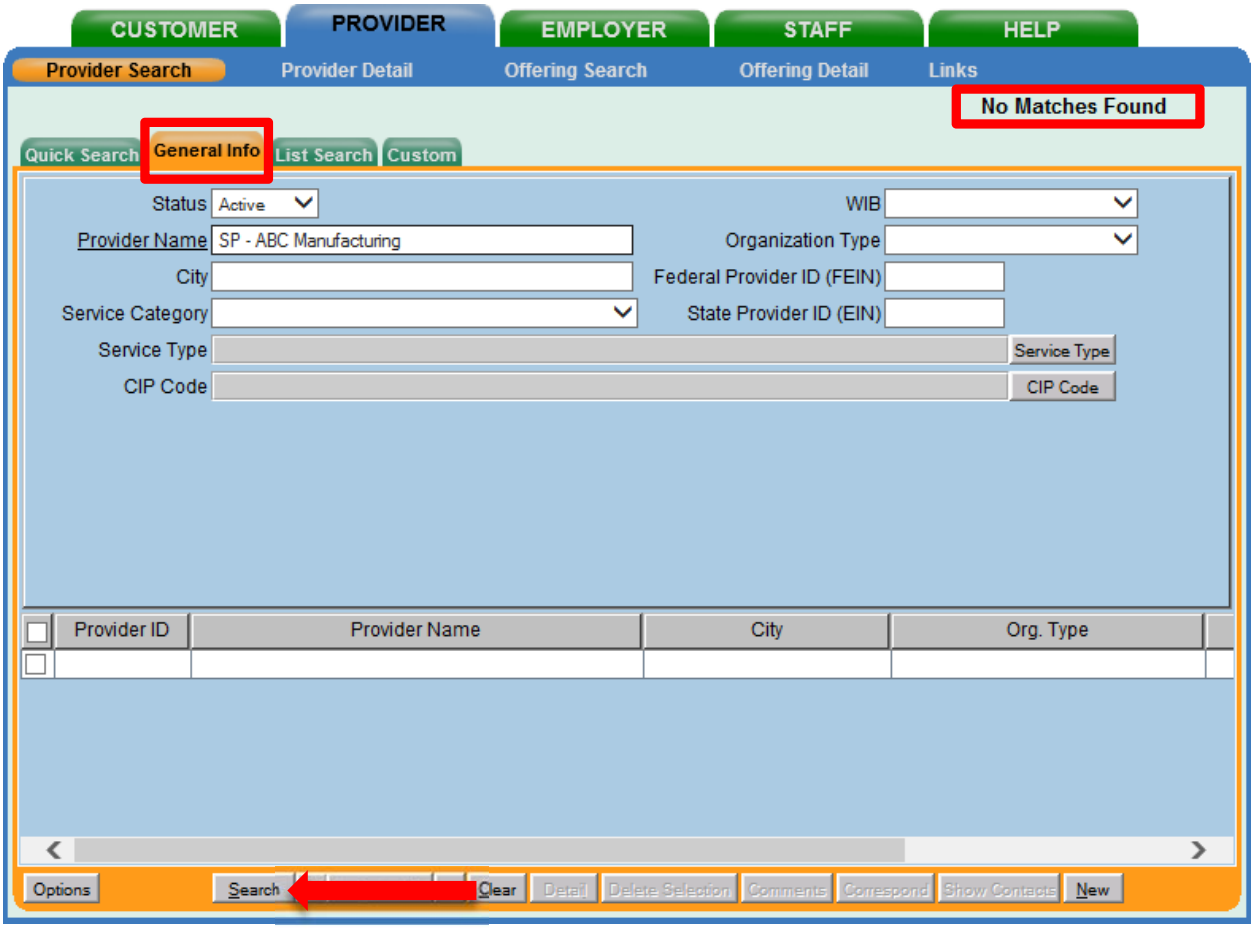
Before creating a new provider record, search OSOS to see if a record already exists for that provider. To do this, navigate to the **Provider** module and then the **Provider Search** window. If the Provider ID is known, enter the ID number on the **Quick Search** tab and click **Search** at the bottom.



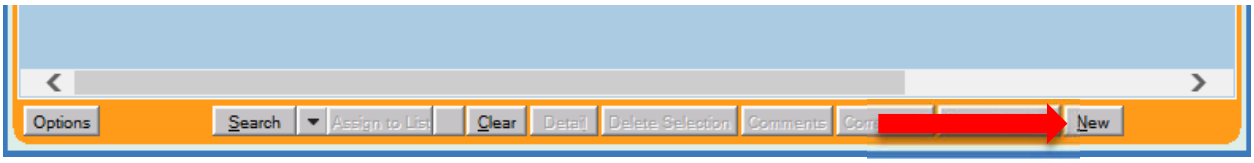
If the Provider ID number is not known, navigate to the **General Info** tab.
Type in the Provider Name and click **Search** at the bottom of the screen.

When conducting a search using the Provider Name field, ensure that you are using the exact Provider Name. If your search returns "No Matches Found," try variations of the Provider Name.

If the system displays "**No Matches Found**" at the top right of the screen, staff must create the provider record.



To create a new provider record, click **New** at the bottom right of this screen.

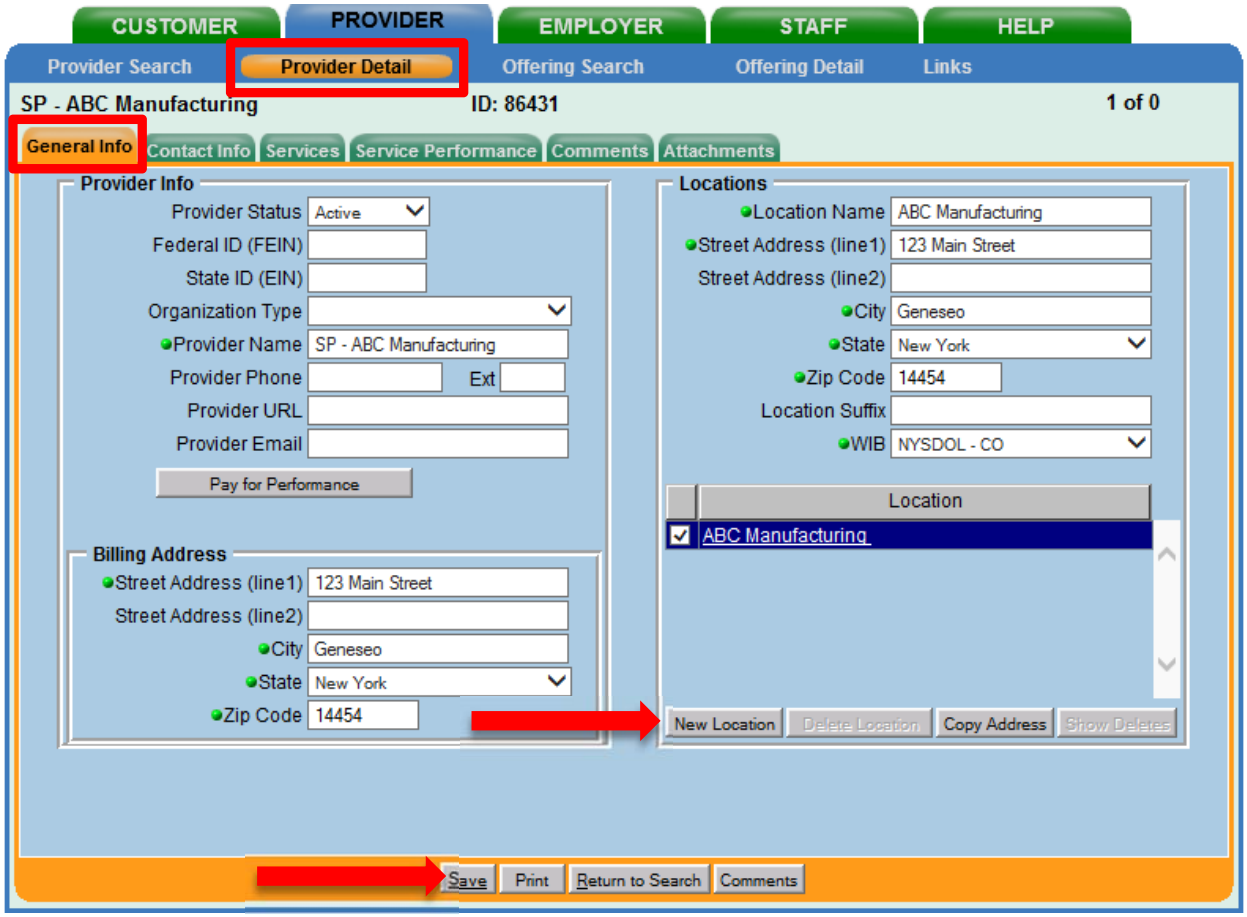


OSOS will automatically navigate to the **Provider Detail** window of the **Provider** module.

Enter all known information in the **Provider Info** section on the left, including **Billing Address**. Only fields marked with a green dot are required. Next, click **New Location** and enter the physical location of the training provider in the **Locations** section.
You may enter more than one location if necessary.

Tip: If the location address is the same as the address in **Provider Info**, use the **Copy Address** button to auto fill the address fields in the **Locations** section.

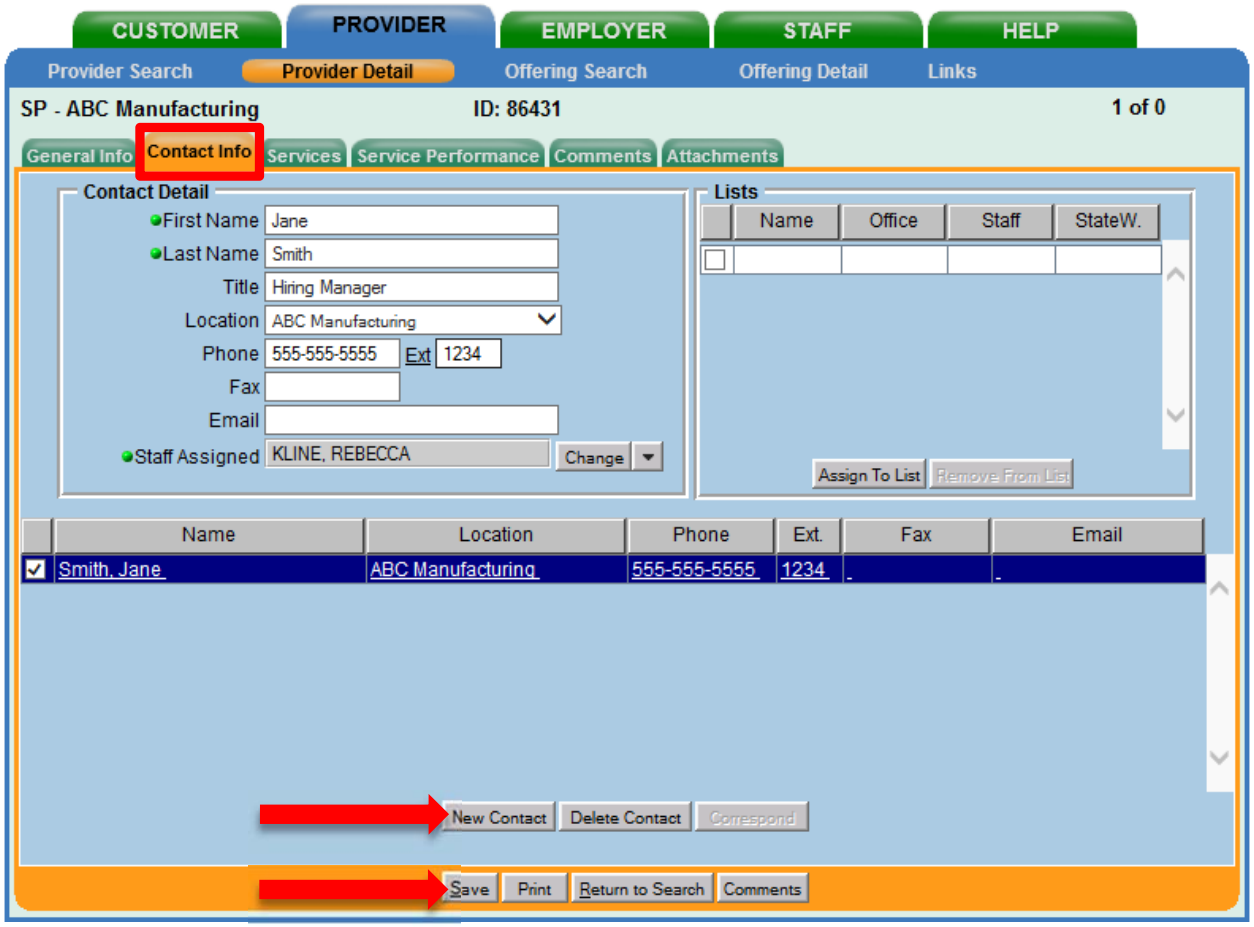
After all necessary information is entered, click **Save** at the bottom of the screen.



Click on the **Contact Info** tab.

Click **New Contact** and enter the appropriate contact information for the provider.

Click **Save**.



CREATING A PROVIDER SERVICE

Under the Work-Based Training (WBT) Initiative, funds are to be used to assist businesses efforts to effect new hires, specifically the expenses involved with occupational skills training. These WBT funds are reserved for the delivery of occupational skills training to newly-hired dislocated workers in need of additional occupational skills or dislocated workers seeking occupational skills training. Training may take the form of on-site training, off-site training, or distance learning.

Eligible applicants can apply for the following work-based training activities:

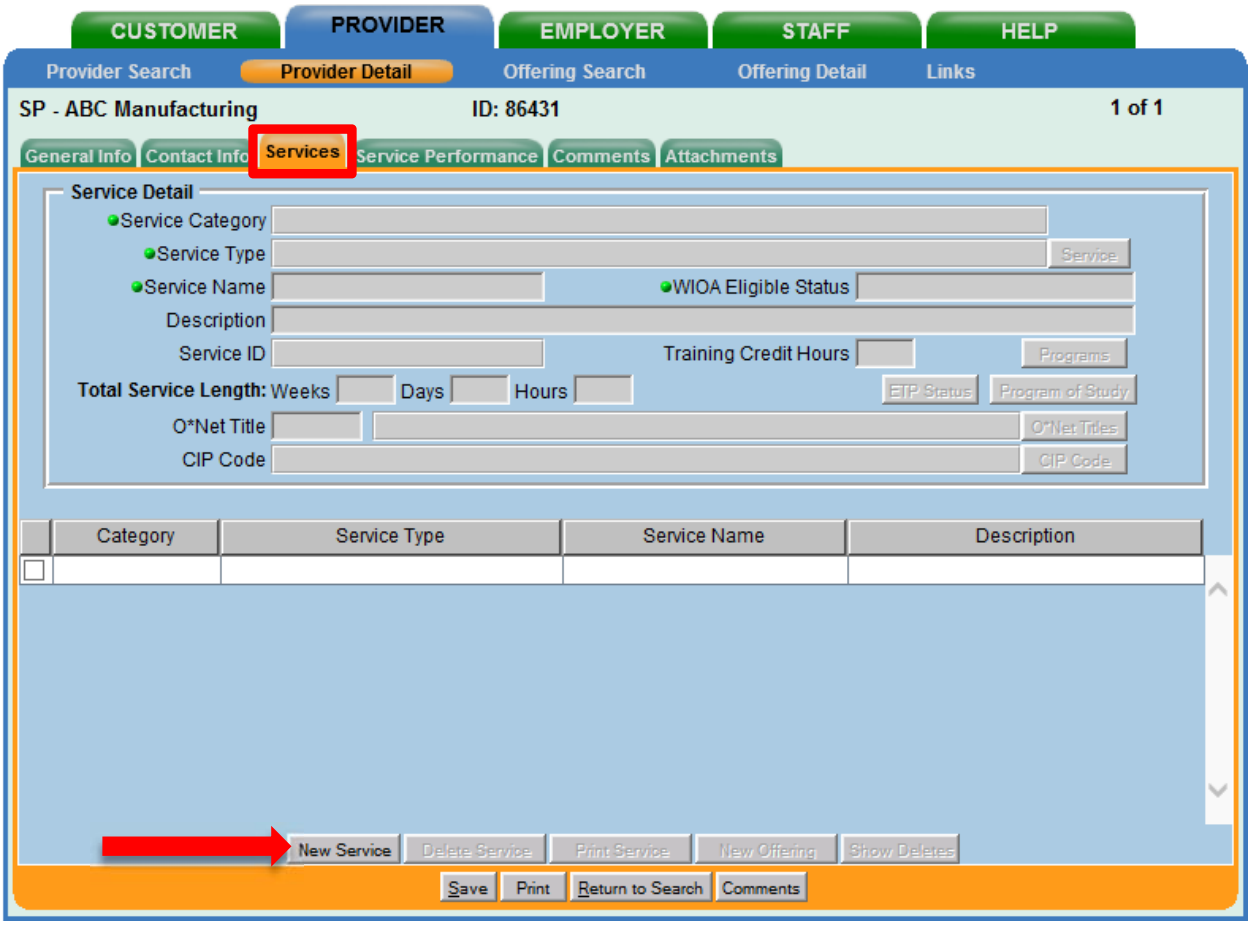
1) **On-The Job Training (OJT)**
OJT is training by a business provided to a paid participant while they are engaged in productive work.

2) **Registered Apprenticeships**
Registered Apprenticeship training is the process of learning a skilled occupation through paid on-the-job training under the guidance of experienced journey workers and related classroom training.

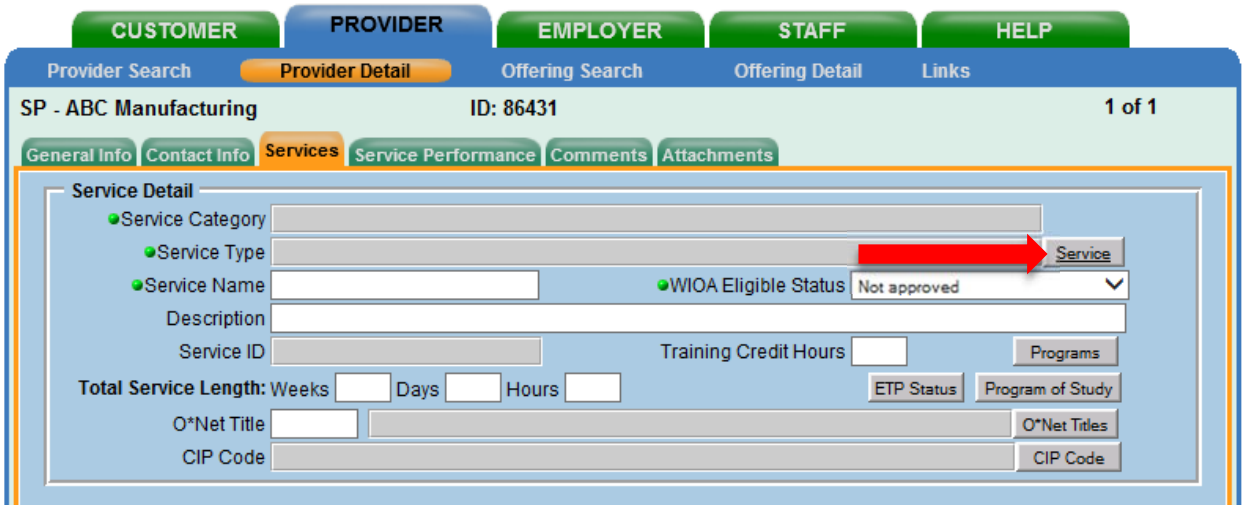
3) **Occupational Skills Training (OST)**
OST is defined as instruction conducted in an institutional or worksite setting designed to provide individuals with, or upgrade in, the skills required to perform a specific job or group of jobs needed by the business. OST for dislocated workers may be paid (new hires that are permanent, temporary, or seasonal) or unpaid (prospective applicants) and the training is:
a. Designed to meet the special requirements of a business or a group of businesses; and
b. Conducted with a commitment from local priority industry business(es) indicating occupational skill related job openings/workforce need and willingness to interview the dislocated workers following training completion.

To record the delivery of these services, they first must be attached to the provider's OSOS record.

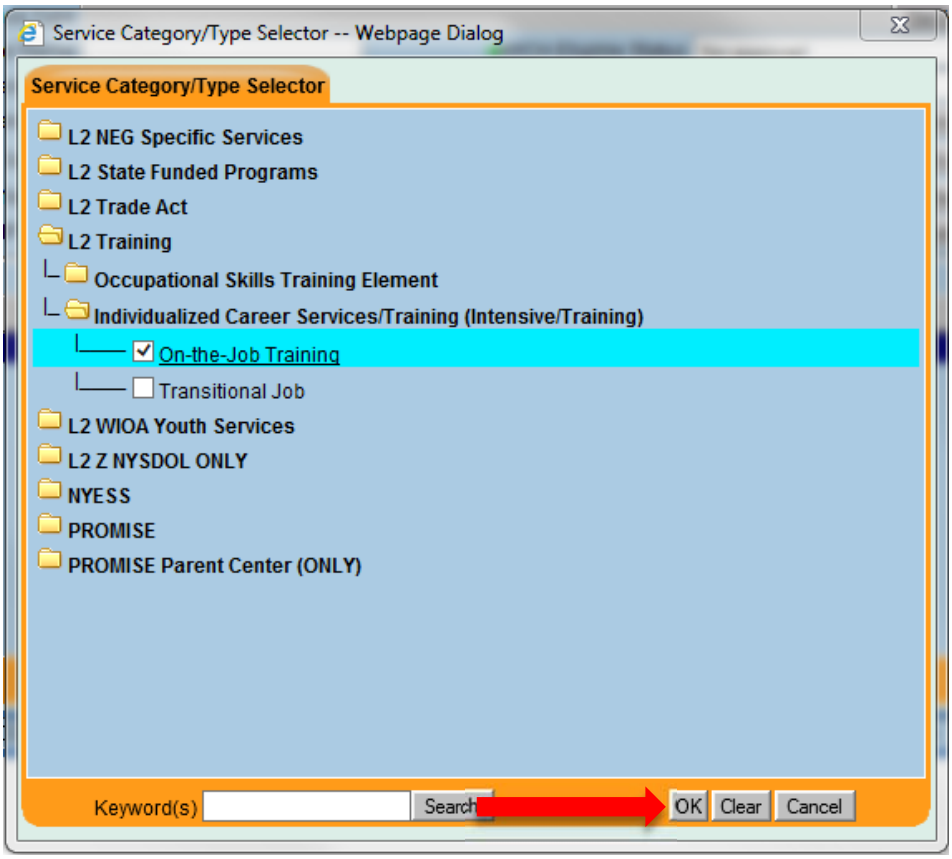
In the **Services** tab of the appropriate provider, click on the **New Service** button.



Click **Services** on the right to search for and add a service type.



To find a service, either type in a keyword in the search box at the bottom of the **Service Category/Type Selector** pop up window or find the service type by clicking on the nested folders.
After finding the appropriate service, check the corresponding box, and click **OK**.

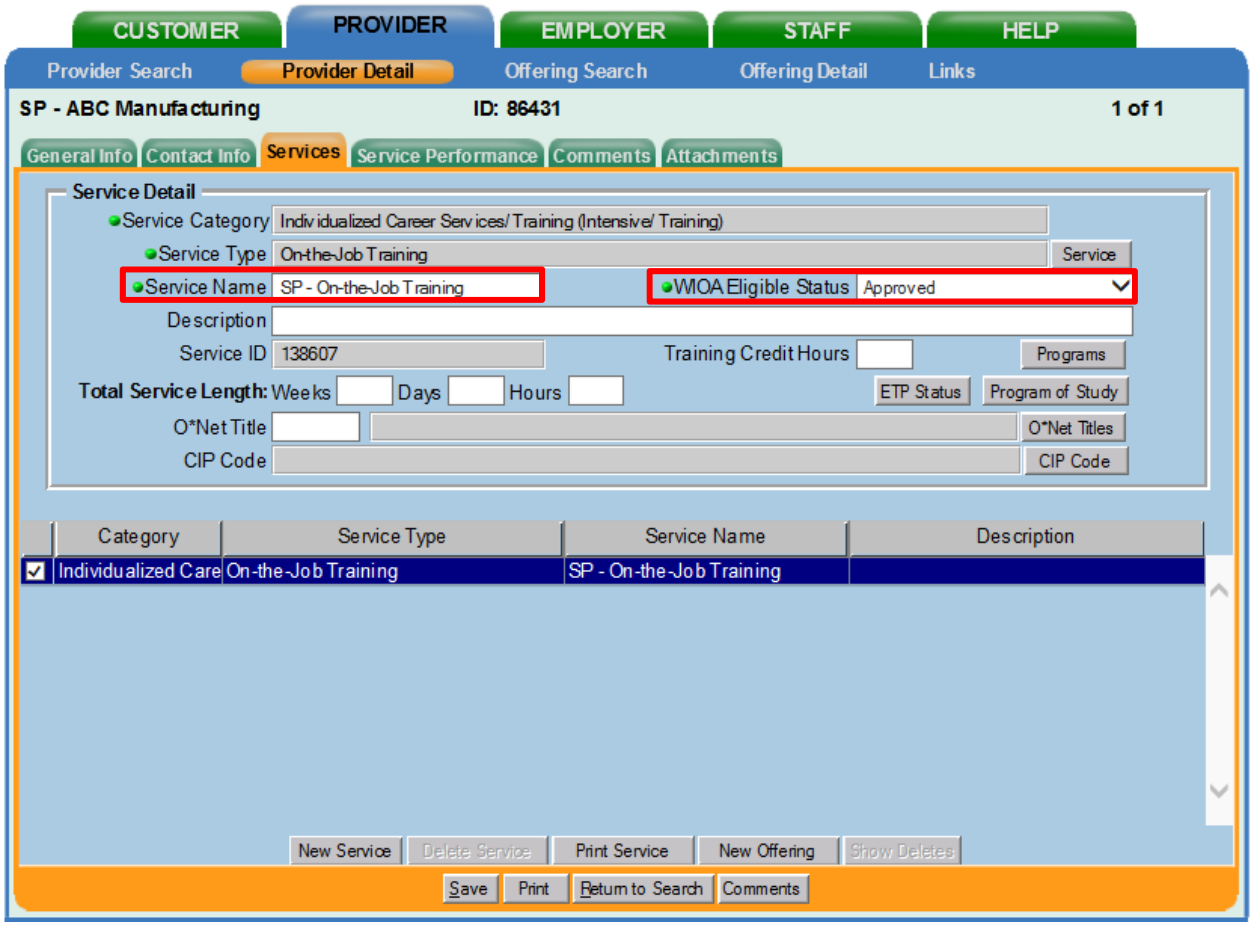


Enter the **Service Name**.

Service names should start with "SP - " followed by the name of the service, as a standard naming convention for the Sector Partnership NEG.
For example, "SP – On-the-Job Training."

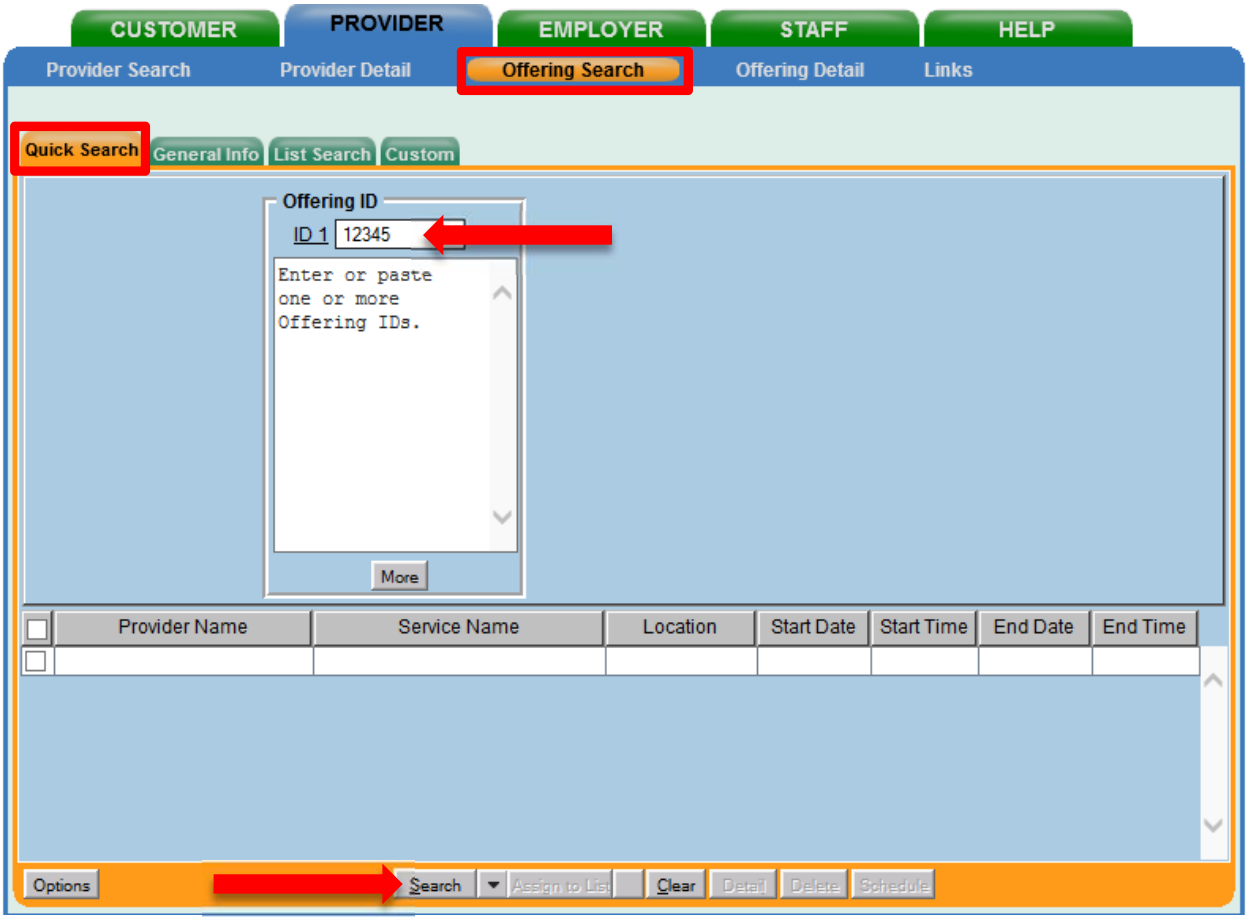
Select "Approved" in the **WIOA Eligible Status** drop-down menu.

Enter a description (optional) in the **Description** field and click **Save**.



CREATING AN OFFERING

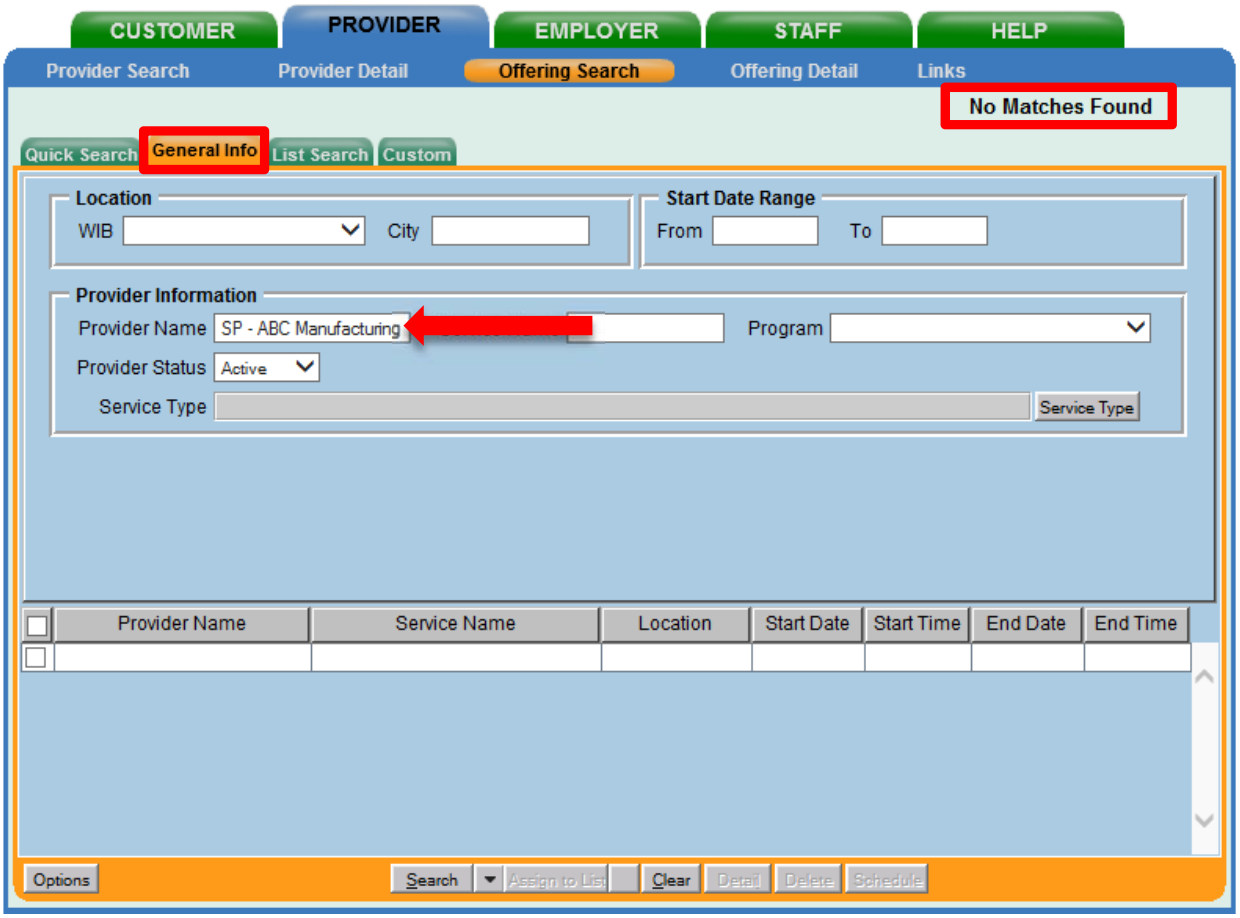
The training/service offered by the provider, combined with the location where the training/service is provided, is identified in OSOS as the **Offering**.As with the Provider Record, you should first search OSOS to determine if the offering already exists in the system. To do this, navigate to the **Offering Search** window of the **Provider** module. If you know the **Offering ID** number, you can type it in the search box on the **Quick Search** tab and click **Search**.



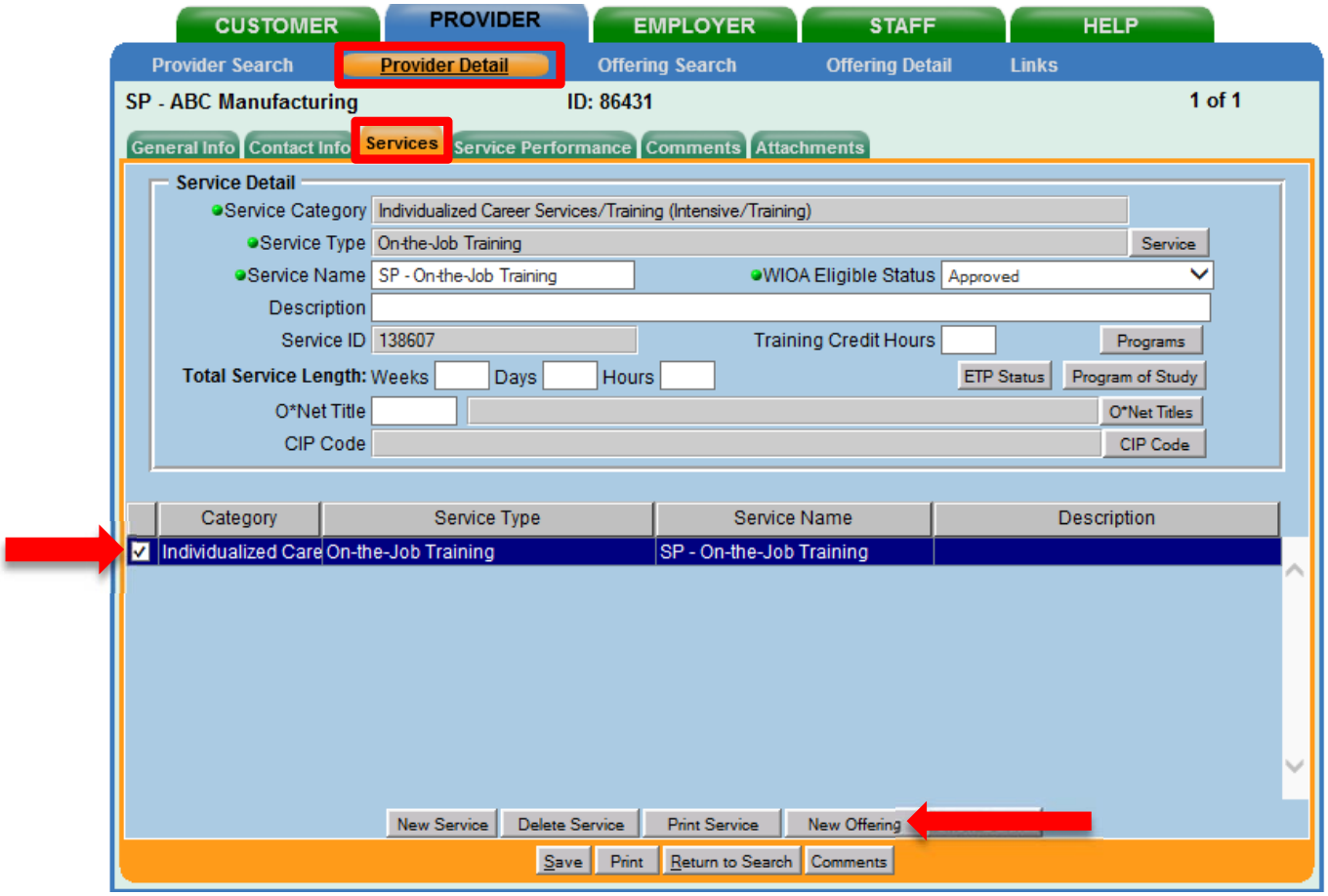
If you do not know the **Offering ID** number, click on the **General Info** tab to conduct a name search.

Enter the **Provider Name** and click **Search**.

If your search returns more than one result, the results will be listed in the bottom section of this screen. If your search returns only one result, OSOS will navigate directly to the Offering Detail screen for that search result. If your search returns no results, you will see the "**No Matches Found"** message at the top right. If no matches are found, you will need to create the offering for this provider.



Navigate to the provider that you wish to add the offering to. From the **Services** tab in **the Provider Detail** window, select the service you wish to create the offering for and click the **New Offering** button.



Select the appropriate business, WIB or training provider from the **Location** drop down menu, if more than one exists. This is the location at which the service is offered.

Check the box for Monday as the day of the week that the training will start, regardless of when the training will actually start.

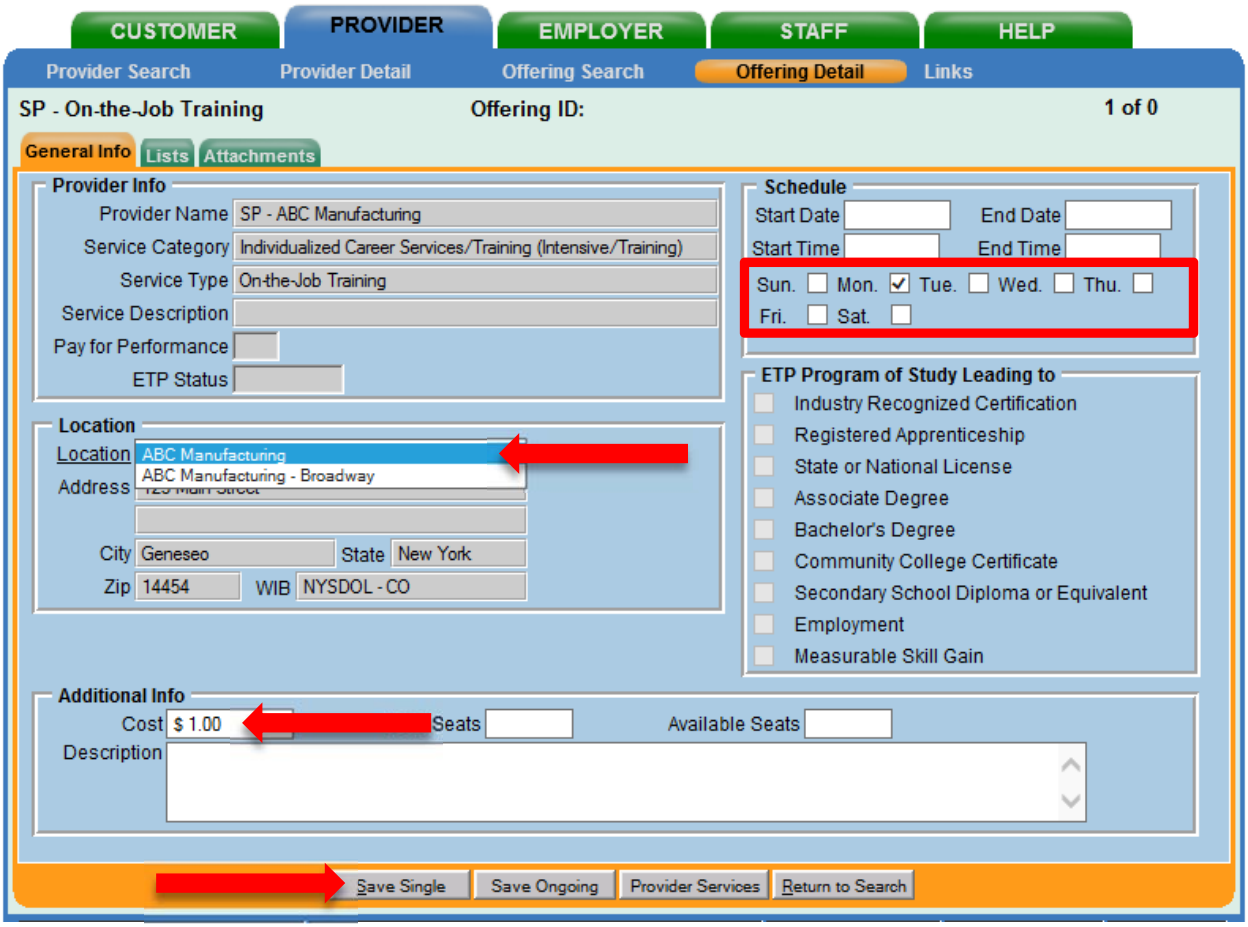
Do not check the Start Date, End Date, End Time, any other days of the week, or enter any number into the Total Seats or Available Seats data fields.

Enter $1.00 in the **Cost** field.

In the **Description** field, enter a brief description of the specific training.

Click the **Save Single** button.

"Record Saved" will display briefly in the top right of the screen.



PARTICIPANT DATA ENTRY

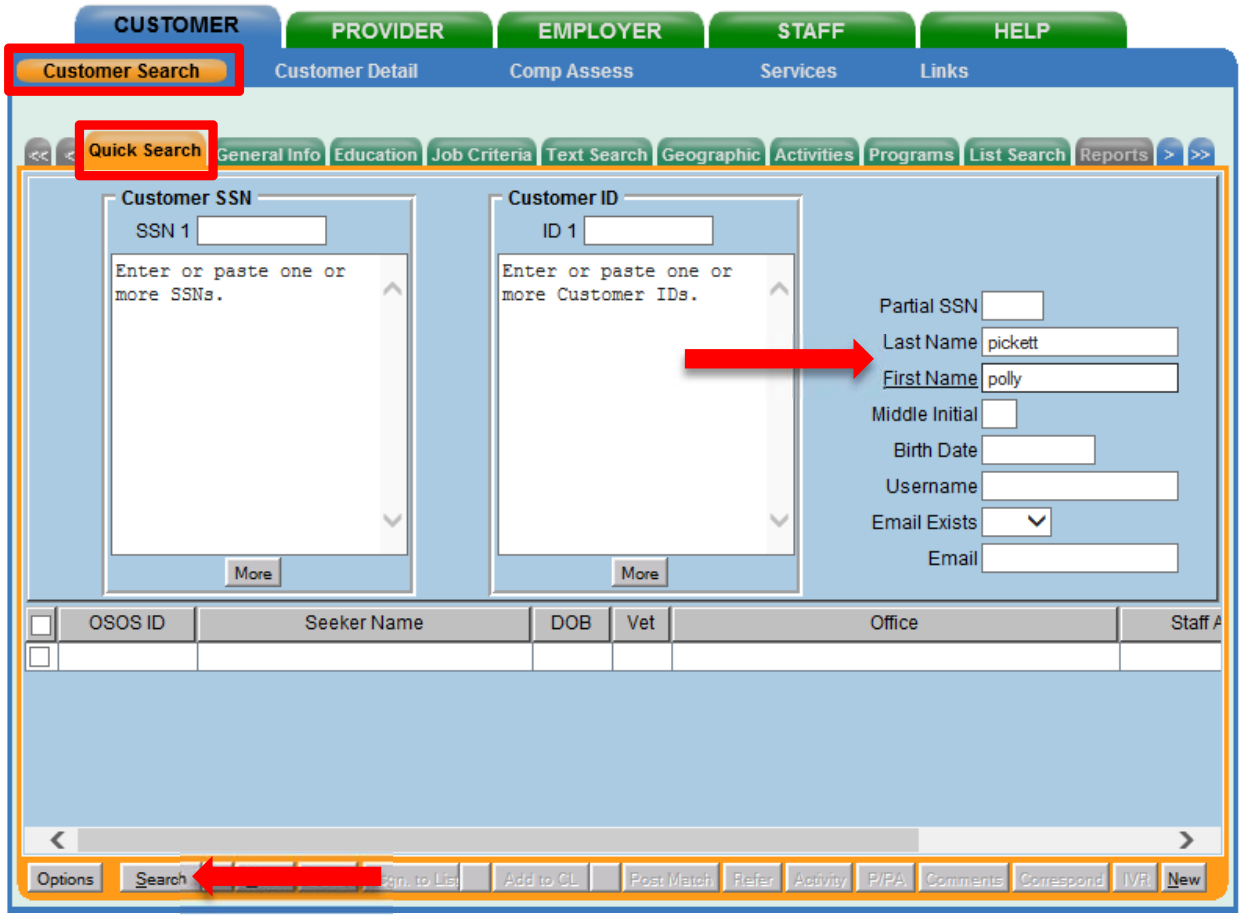
Now that the Training Provider(s), Service(s), and Offering(s) are in OSOS, staff may record participant data relevant to the services being provided to them.

RECORD THE SERVICE

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.

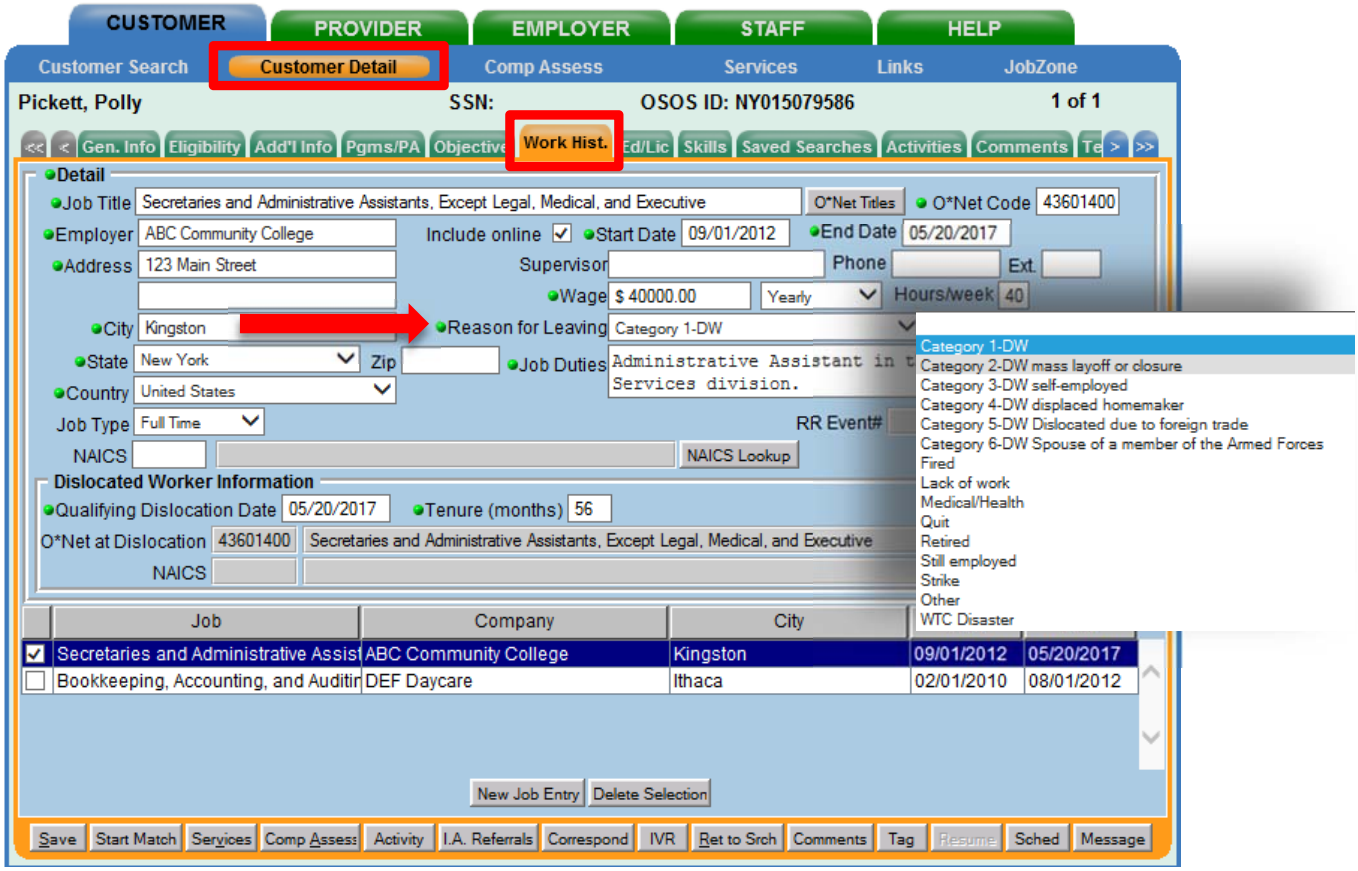
If a customer name search returns multiple records for the same customer, contact the OSOS help desk at help.osos@labor.ny.gov or 518-457-6586 to determine which record should be used.



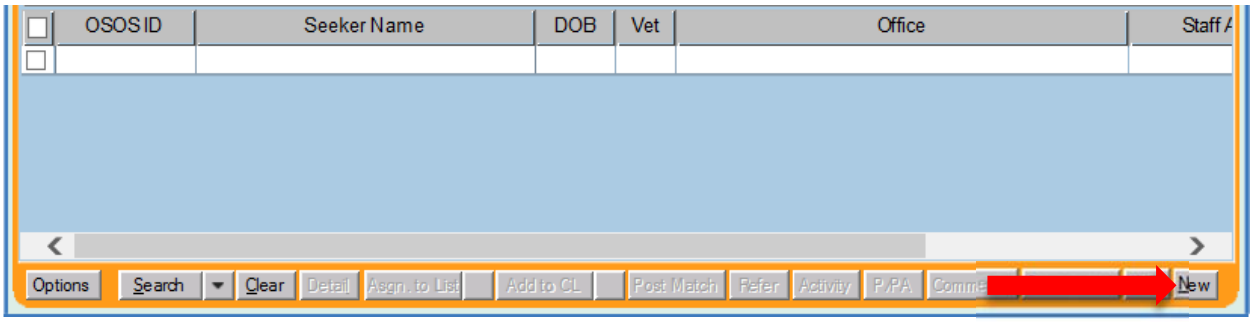
An eligible participant MUST be categorized as a dislocated worker.

Eligible dislocated workers under this Request for Application (RFA) must have been newly hired dislocated workers in need of the identified occupational training or unemployed dislocated workers with skill-based barriers to employment in priority industries. Dislocated workers in SP-NEG WBT funded training programs must be enrolled in a Dislocated Worker program or seeking training to obtain employment or career advancement in priority industries at a NYS Career Center.

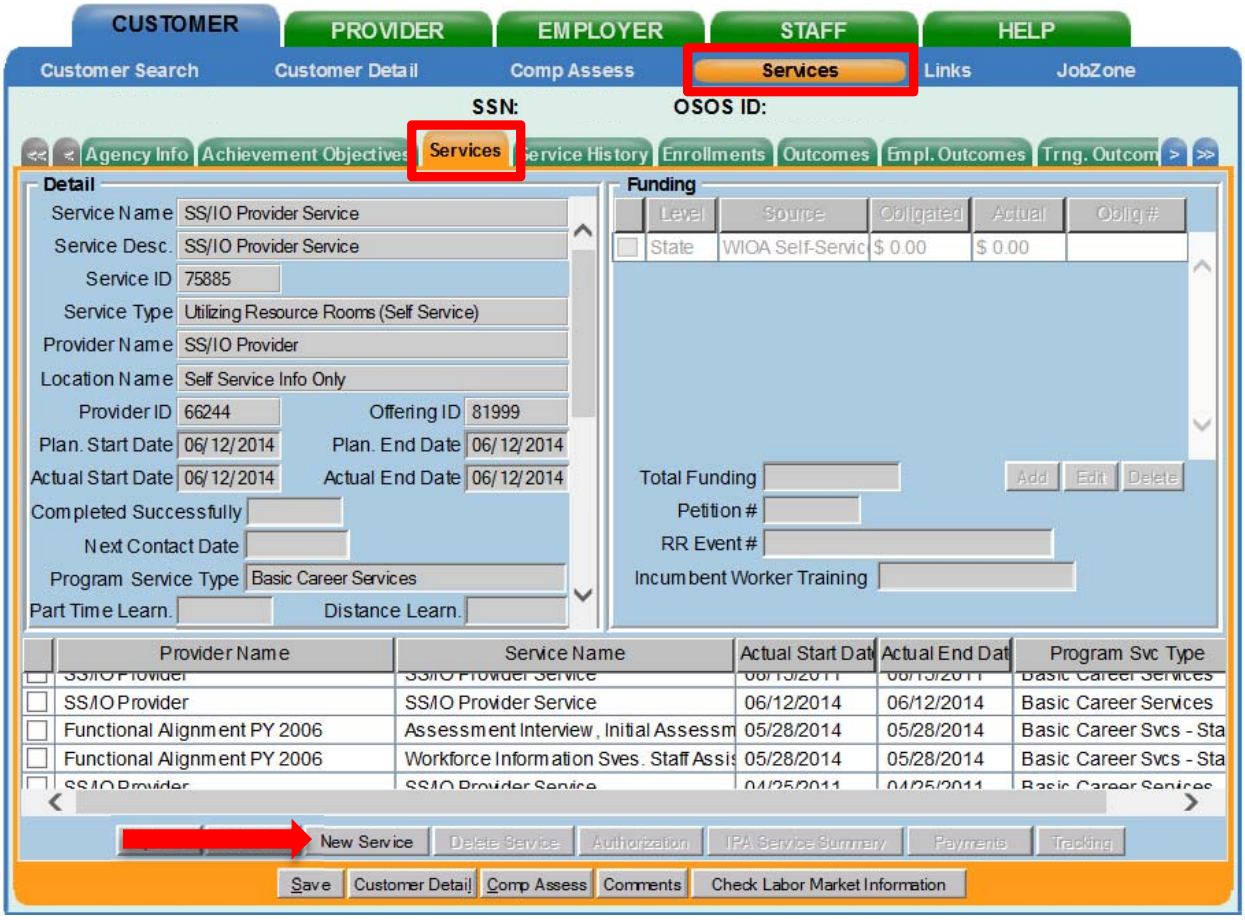
Dislocated worker status is documented on the **Work History** tab within the **Customer Detail** window of the **Customer** module, in the **Reason for Leaving** field. Eligible participants will have one designation between Category 1-DW through Category 6-DW.



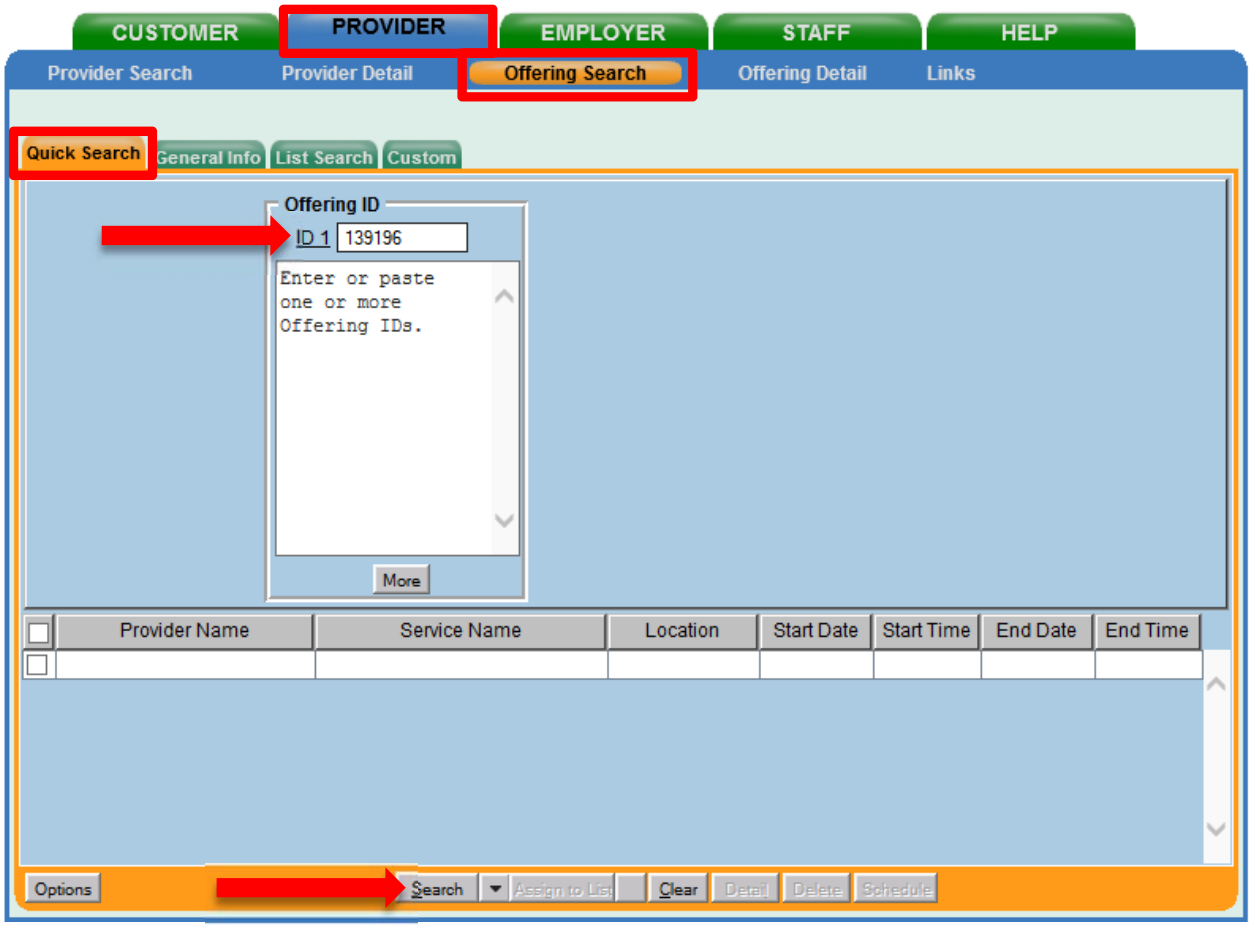
If the participant does not have an OSOS record one must be created. To create a new OSOS customer record click **New** at the bottom of the screen and fill in the necessary details in the **Customer Detail** tabs.



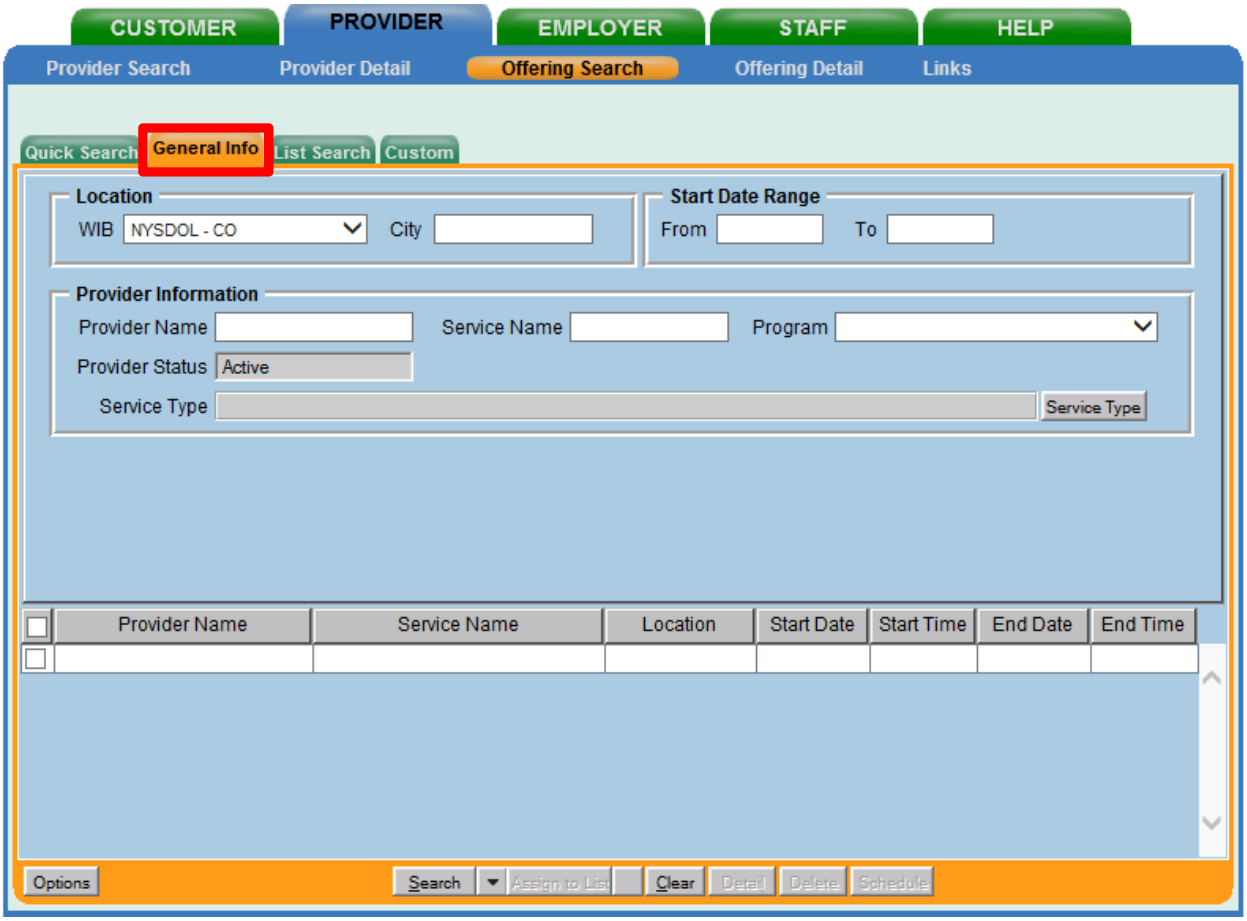
Once in the correct customer record, navigate to the **Services** window and then the **Services** tab of the customer record. Click on the **New Service** button at the bottom of the screen.



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

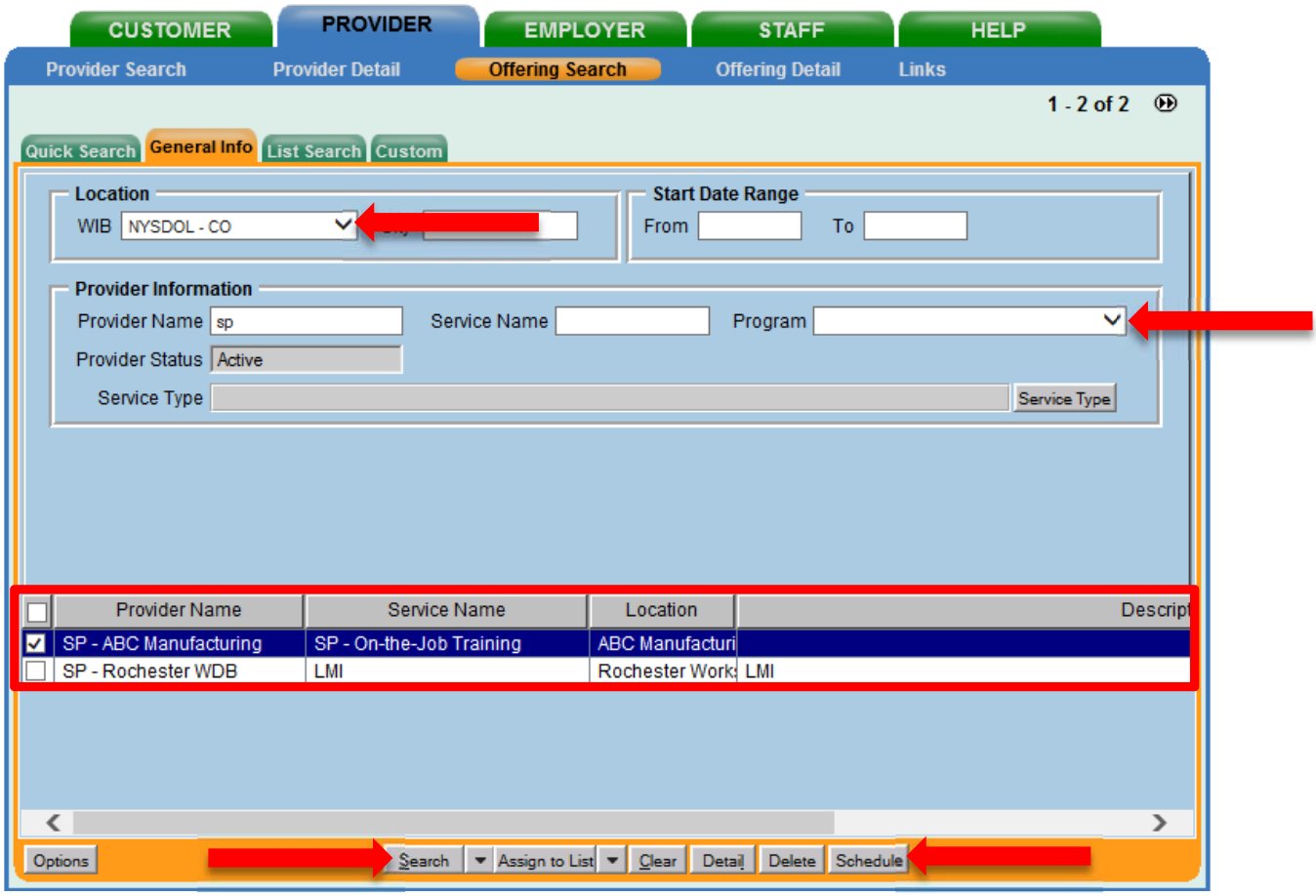


If the **Offering ID** is not known, click on the **General Info** tab.

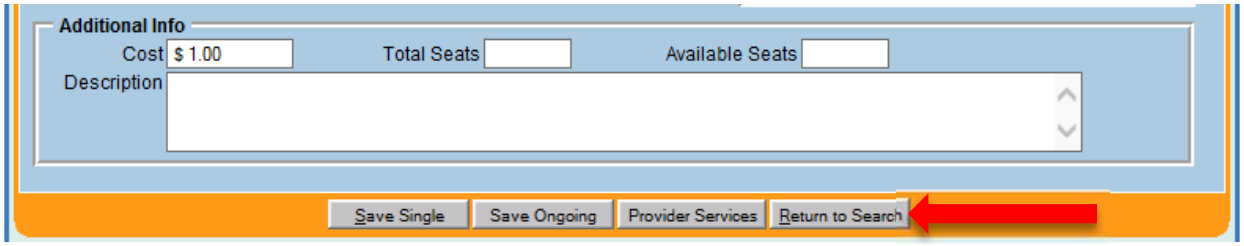


Select the **WIB**. Enter any known information in the available data fields. OSOS allows you to enter a partial name for the **Provider Name** and **Service Name** fields. You can also select the Program Type from the **Program** drop down menu. Click **Search**.

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

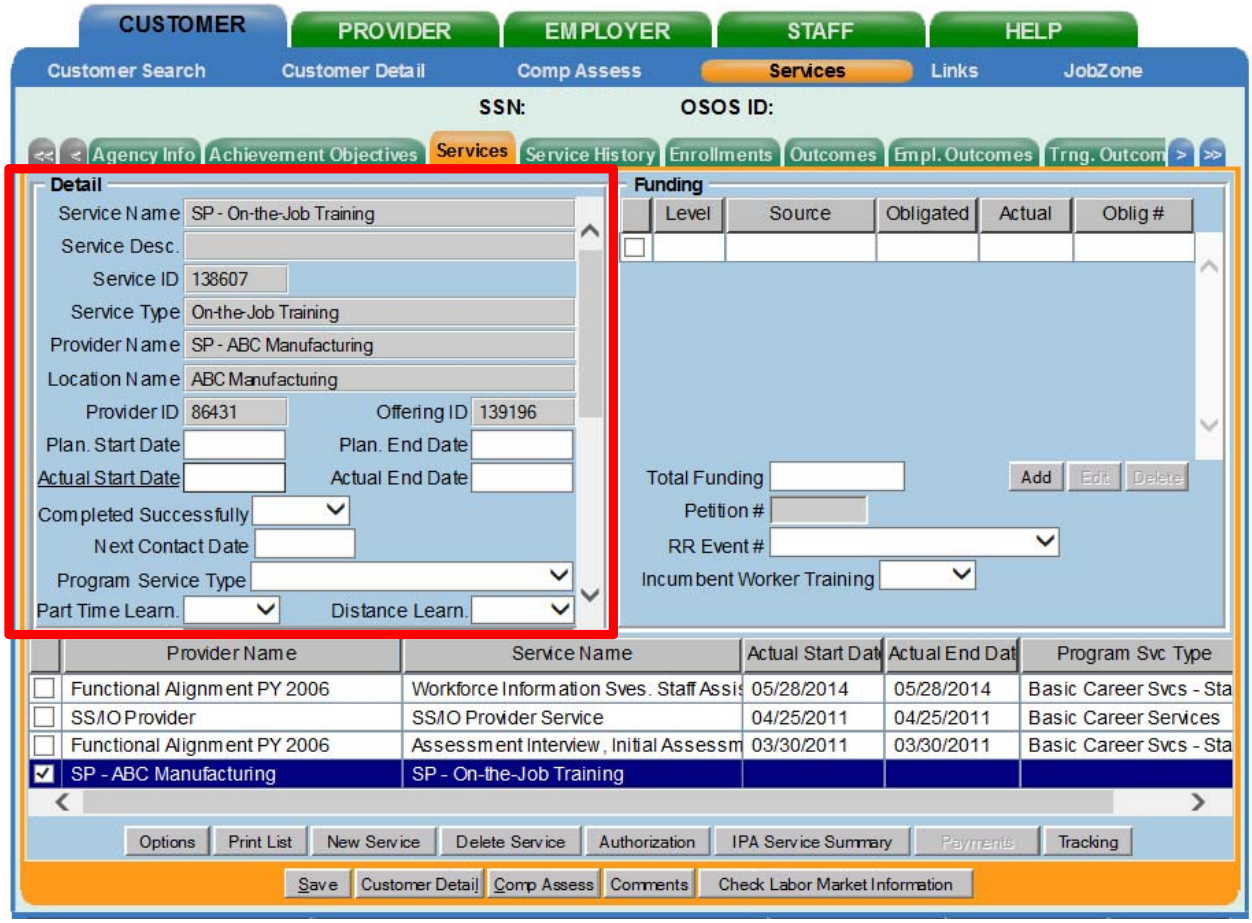


*If your search only returns one result, OSOS will navigate directly to the **Offering Detail** screen for that provider. Click on the **Return to Search** button at the bottom of the screen to navigate back to the **General Info** tab. This will allow you to schedule the service.*



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 and complete the data entry in the **Detail** section (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 actually began.

Actual End Date – This field can be left blank until the service ends. If the service is a one-day service (such as a Comprehensive Assessment), 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 in order 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.

Note: On-the-Job Training and Apprenticeships should be categorized as Non- ITA Training.
Occupational Skills Training should be categorized as ITA-Training.

O*Net – (If applicable) 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.

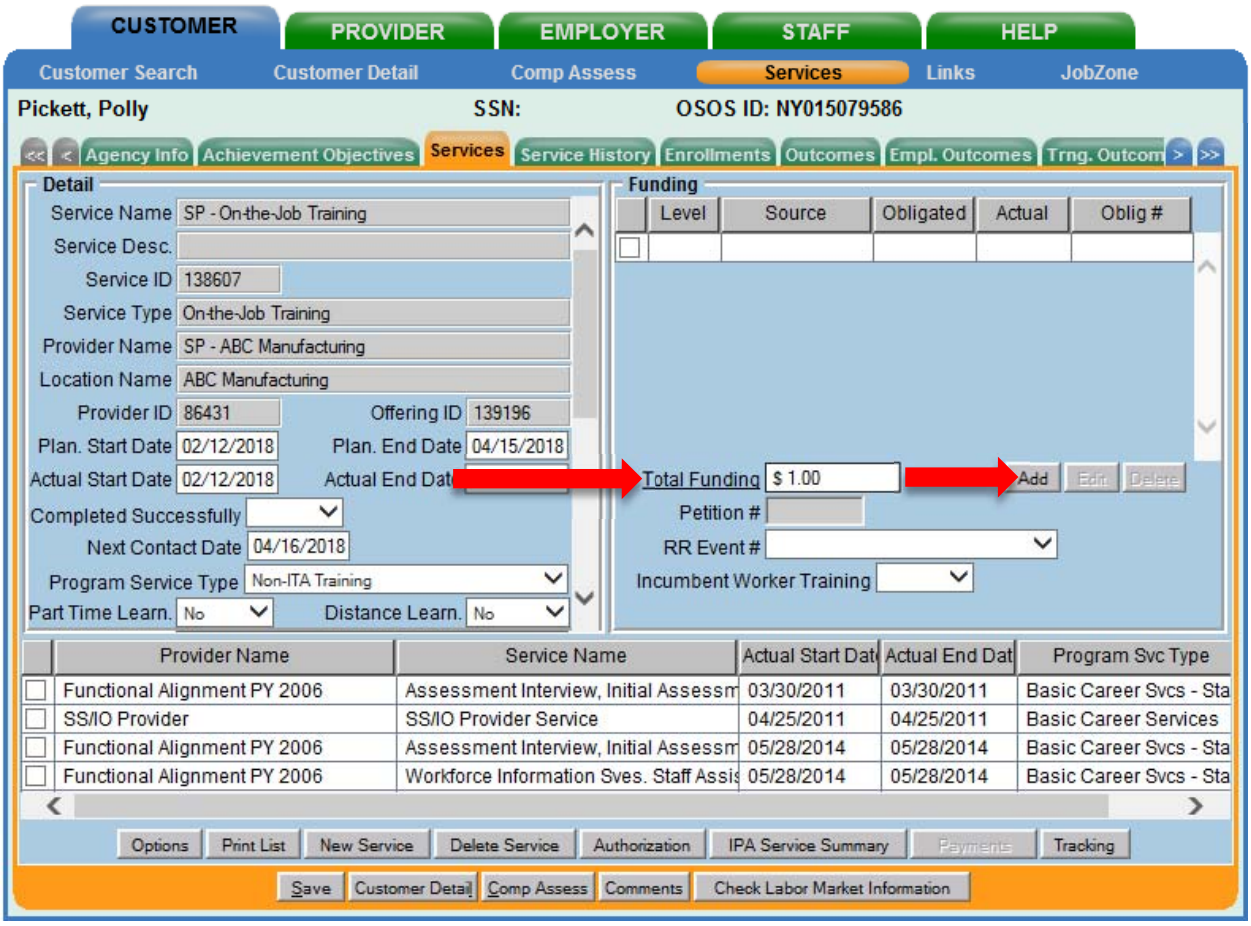
WIB Assigned, Agency, Office – These fields will auto load information attached to the service. If the information is incorrect, click the **Change Office** button to update.

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

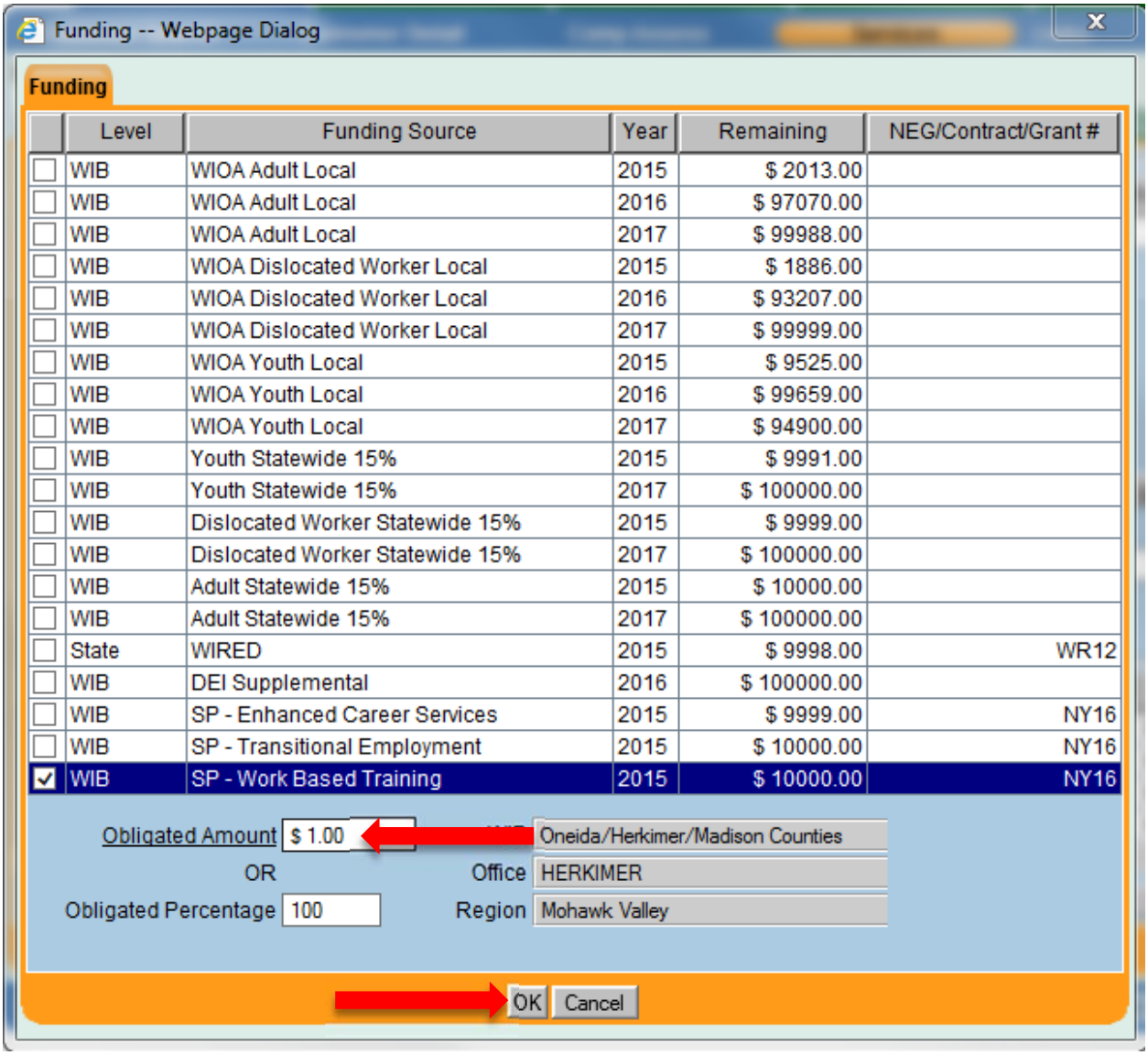
Once the **Detail** section (left-hand side) has been completed, click **Save**.

Now the **Funding** section (right-hand side) must be completed for the service. To do this, enter $1.00 in the **Total Funding** field. 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.

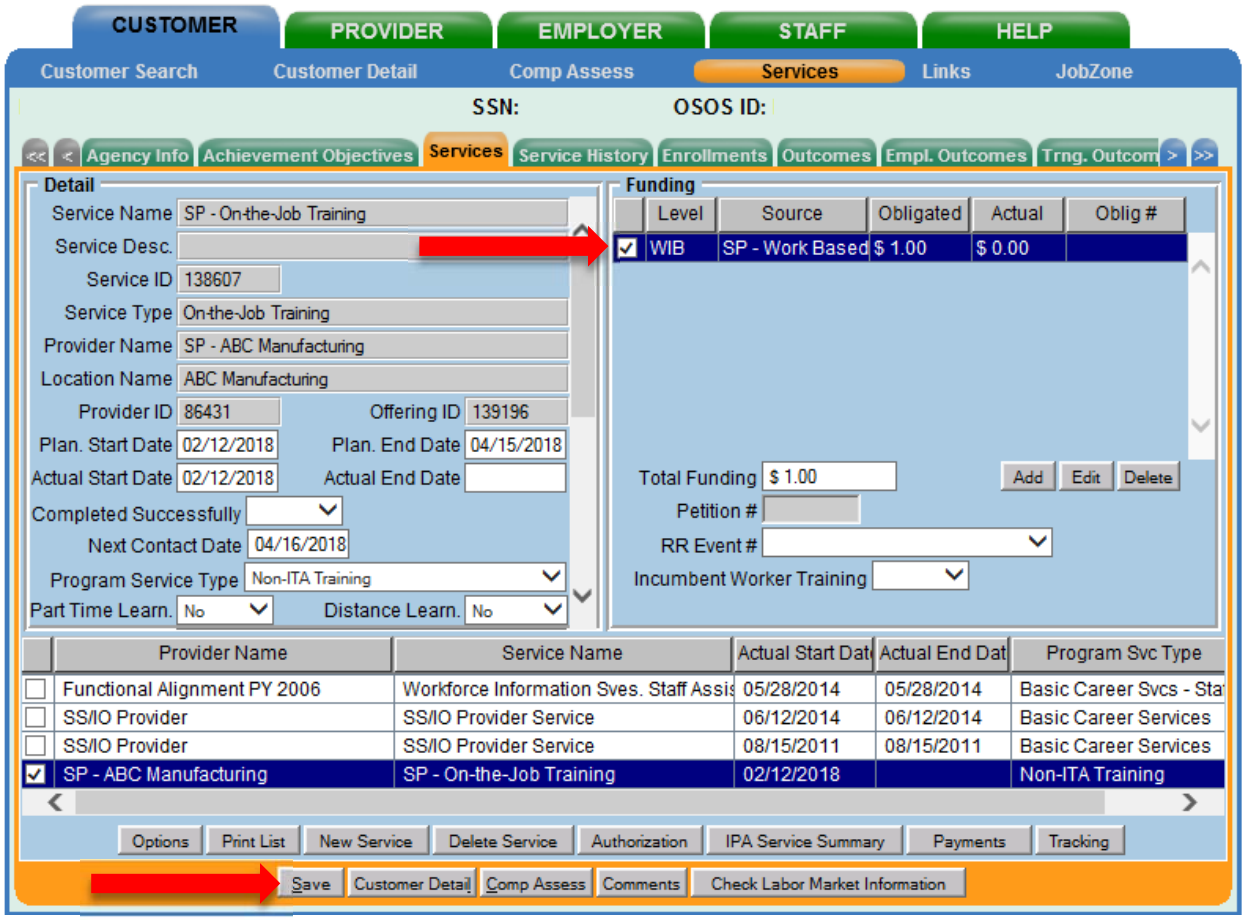


After you click **Add**, a pop up widow will appear with a list of funding sources. Check the box next to **SP – Work Based Training** to select that funding source. Enter "$1.00" in the **Obligated Amount** field and click **OK**.



	Level	Funding Source	Year	Remaining	NEG/Contract/Grant #
☐	WIB	WIOA Adult Local	2015	$ 2013.00	
☐	WIB	WIOA Adult Local	2016	$ 97070.00	
☐	WIB	WIOA Adult Local	2017	$ 99988.00	
☐	WIB	WIOA Dislocated Worker Local	2015	$ 1886.00	
☐	WIB	WIOA Dislocated Worker Local	2016	$ 93207.00	
☐	WIB	WIOA Dislocated Worker Local	2017	$ 99999.00	
☐	WIB	WIOA Youth Local	2015	$ 9525.00	
☐	WIB	WIOA Youth Local	2016	$ 99659.00	
☐	WIB	WIOA Youth Local	2017	$ 94900.00	
☐	WIB	Youth Statewide 15%	2015	$ 9991.00	
☐	WIB	Youth Statewide 15%	2017	$ 100000.00	
☐	WIB	Dislocated Worker Statewide 15%	2015	$ 9999.00	
☐	WIB	Dislocated Worker Statewide 15%	2017	$ 100000.00	
☐	WIB	Adult Statewide 15%	2015	$ 10000.00	
☐	WIB	Adult Statewide 15%	2017	$ 100000.00	
☐	State	WIRED	2015	$ 9998.00	WR12
☐	WIB	DEI Supplemental	2016	$ 100000.00	
☐	WIB	SP - Enhanced Career Services	2015	$ 9999.00	NY16
☐	WIB	SP - Transitional Employment	2015	$ 10000.00	NY16
☑	WIB	SP - Work Based Training	2015	$ 10000.00	NY16

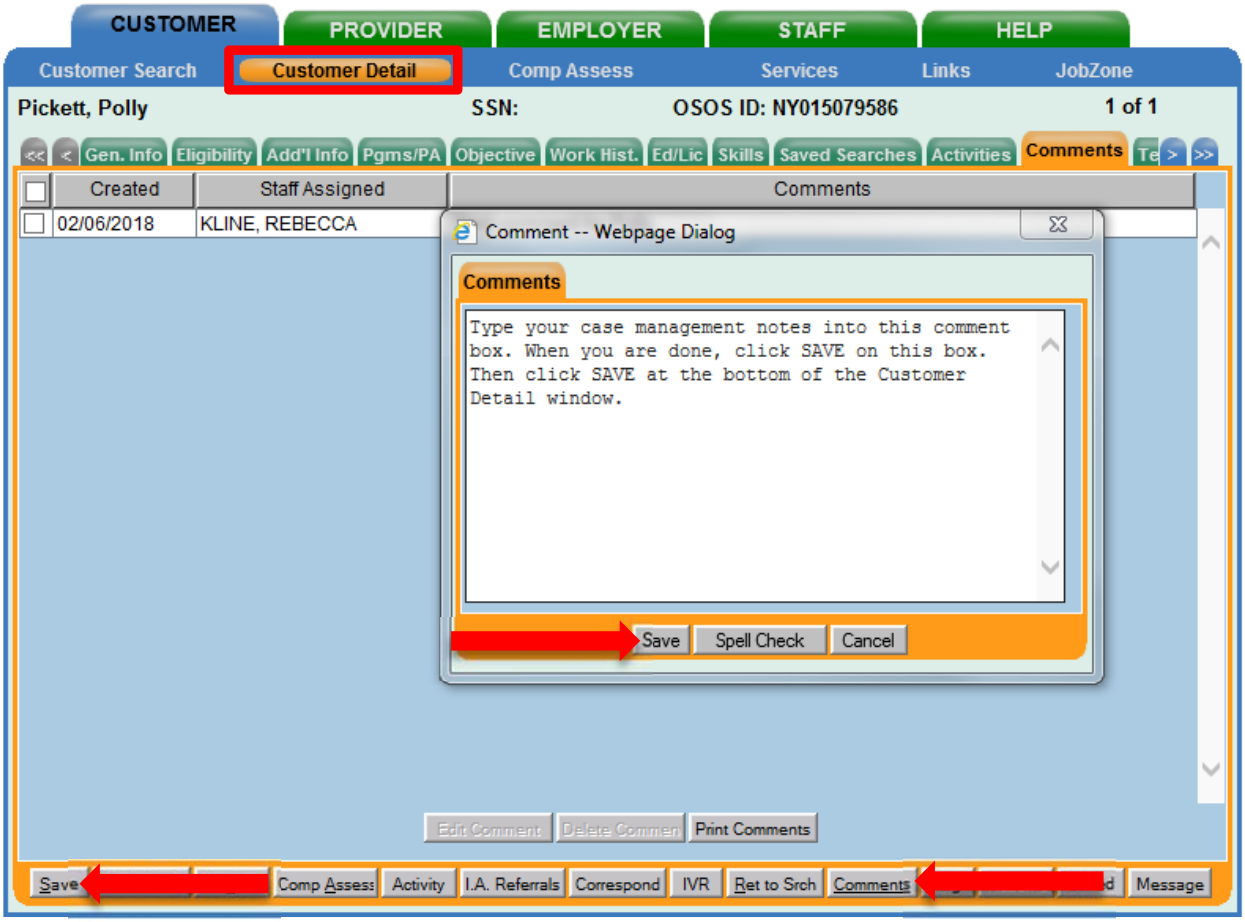
The funding will now appear in the **Funding** section on the right-hand side. Click **Save** at the bottom of the screen.



ENTER COMMENTS

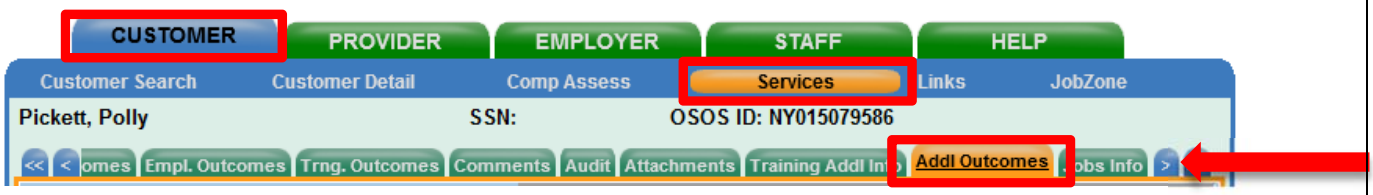
Comments are used to record case management notes. All users should record comments, details about services, and case notes that concern the customer being served.

Comments can be added by clicking the **Comments** button at the bottom of the screen in the **Customer Detail** window. The **Comments -- 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 by clicking **Save** at the bottom of the screen.

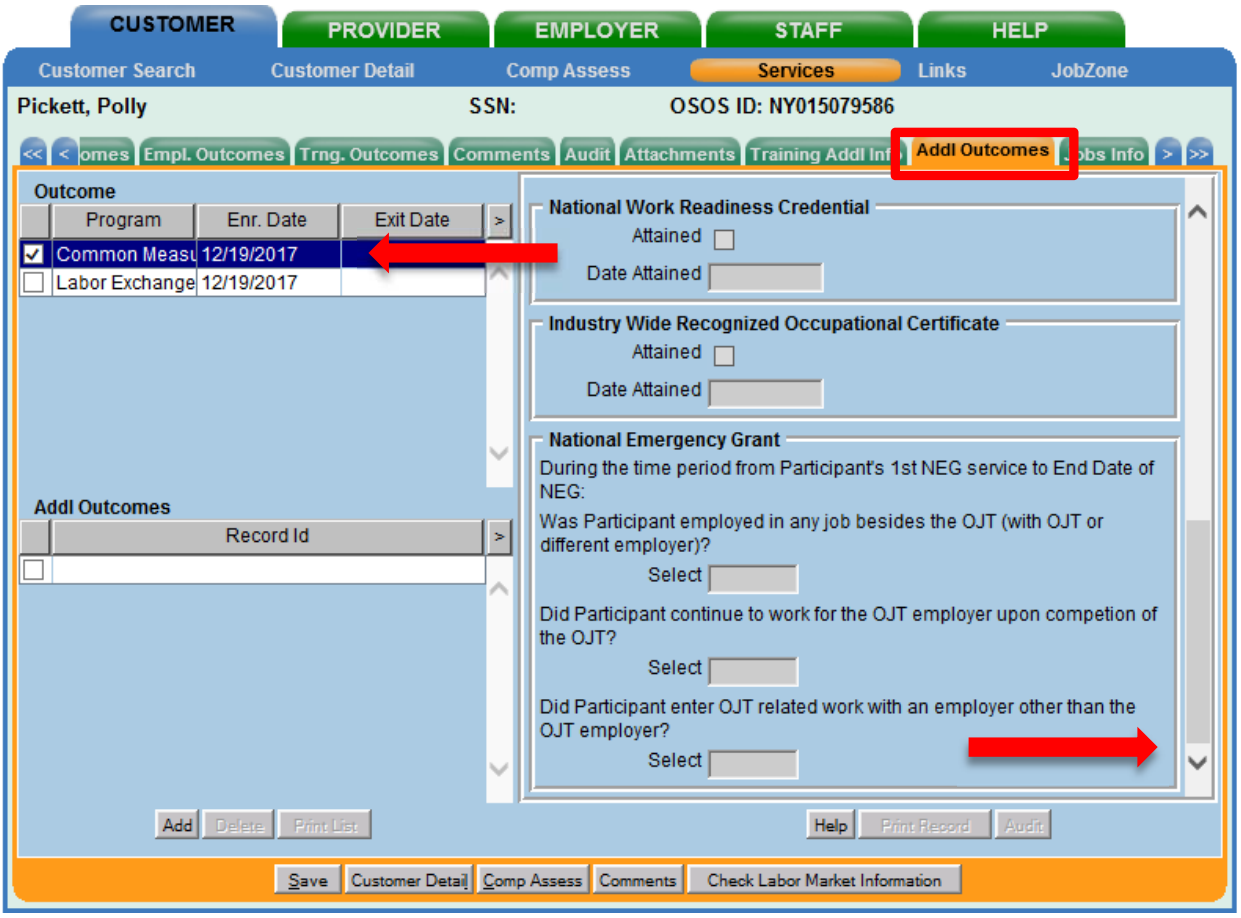


ENTER OUTCOMES

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 **Addl Outcomes** (Additional Outcomes) tab.

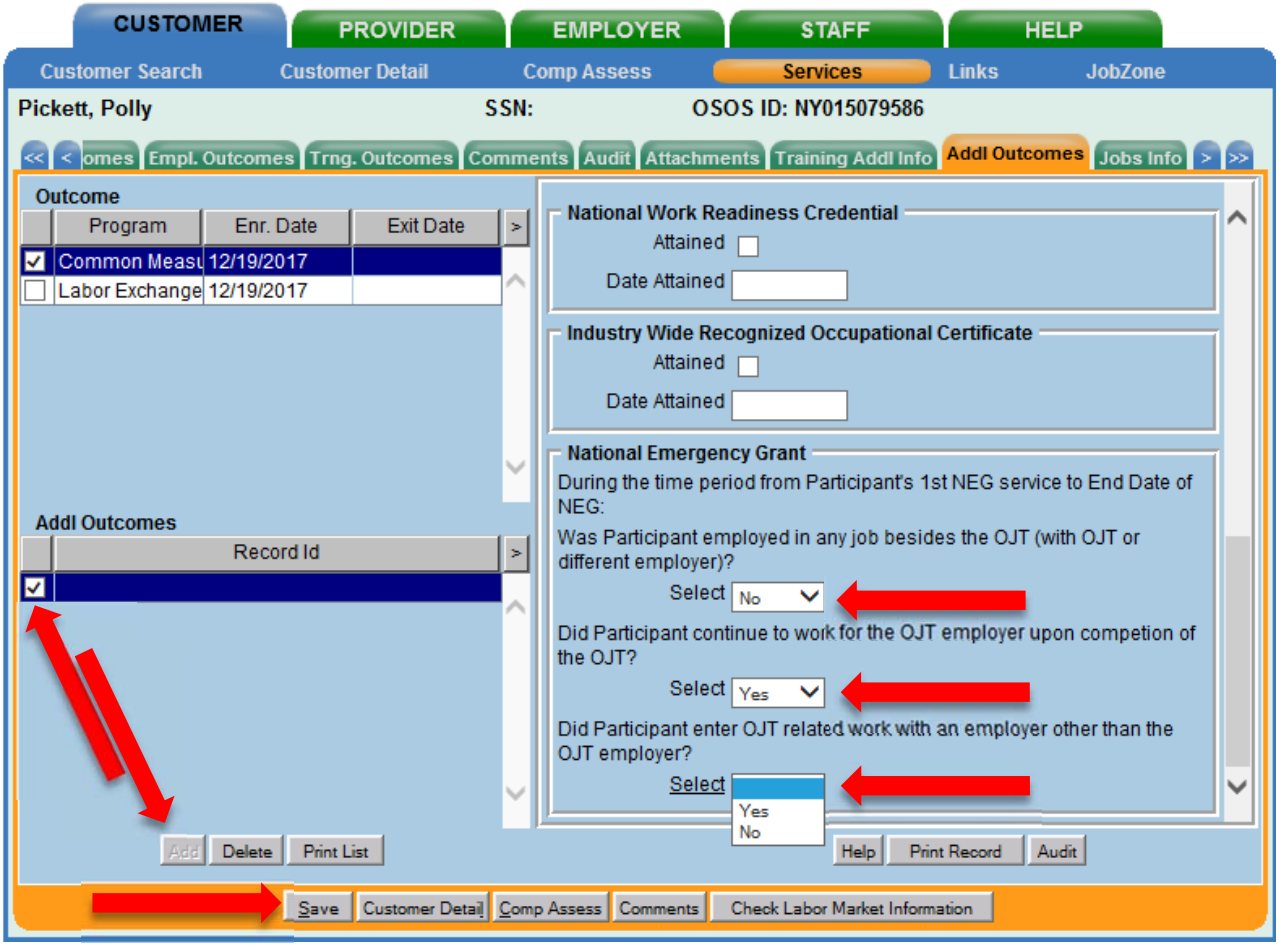


On the **Addl Outcomes** tab, select the **Common Measures** enrollment with an enrollment date that corresponds to the date the SP – NEG service was entered (left-hand side).
After you select the enrollment, use the scrollbar on the right-hand side to scroll down to the very bottom of the page.



Under the **Record ID** section (bottom left-hand side), click the **Add** button. This will allow you to enter data in the fields on the right. Under the **National Emergency Grant** section, select "Yes" or "No" in the drop down menu for each of the three questions and click **Save**.

Be sure to answer all three questions.



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