Trade and Economic Transition Dislocated Worker Grant Training OSOS Guide

1/8/2019

TABLE OF CONTENTS

Purpose 1
Participant Data Entry 2
Record the Service 2
Add Funding 16
Enter Comments 19
Enter Outcomes 20
Resources and Assistance 21

PURPOSE

The purpose of the Trade and Economic Transition (TET) Dislocated Worker Grant (DWG) is to address emerging workforce and economic challenges that may not be limited to one business, one industry, or one geographic area. New York State (NYS) has experienced an economic transition caused by global economic pressures exacerbated by technological change and globalization. Through the TET DWG, the New York State Department of Labor will partner with 30 Local Workforce Development Boards (LWDB) in NYS to coordinate training (classroom and work-based), career, and supportive services to dislocated workers seeking reentry into the workforce and increasing their skill levels to become competitive for growing or high-demand employment opportunities.

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 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 TET DWG.

For additional information on the TET DWG:

https://wdr.doleta.gov/directives/attach/TEGL/TEGL_2-18_acc.pdf

PARTICIPANT DATA ENTRY

RECORD THE SERVICE

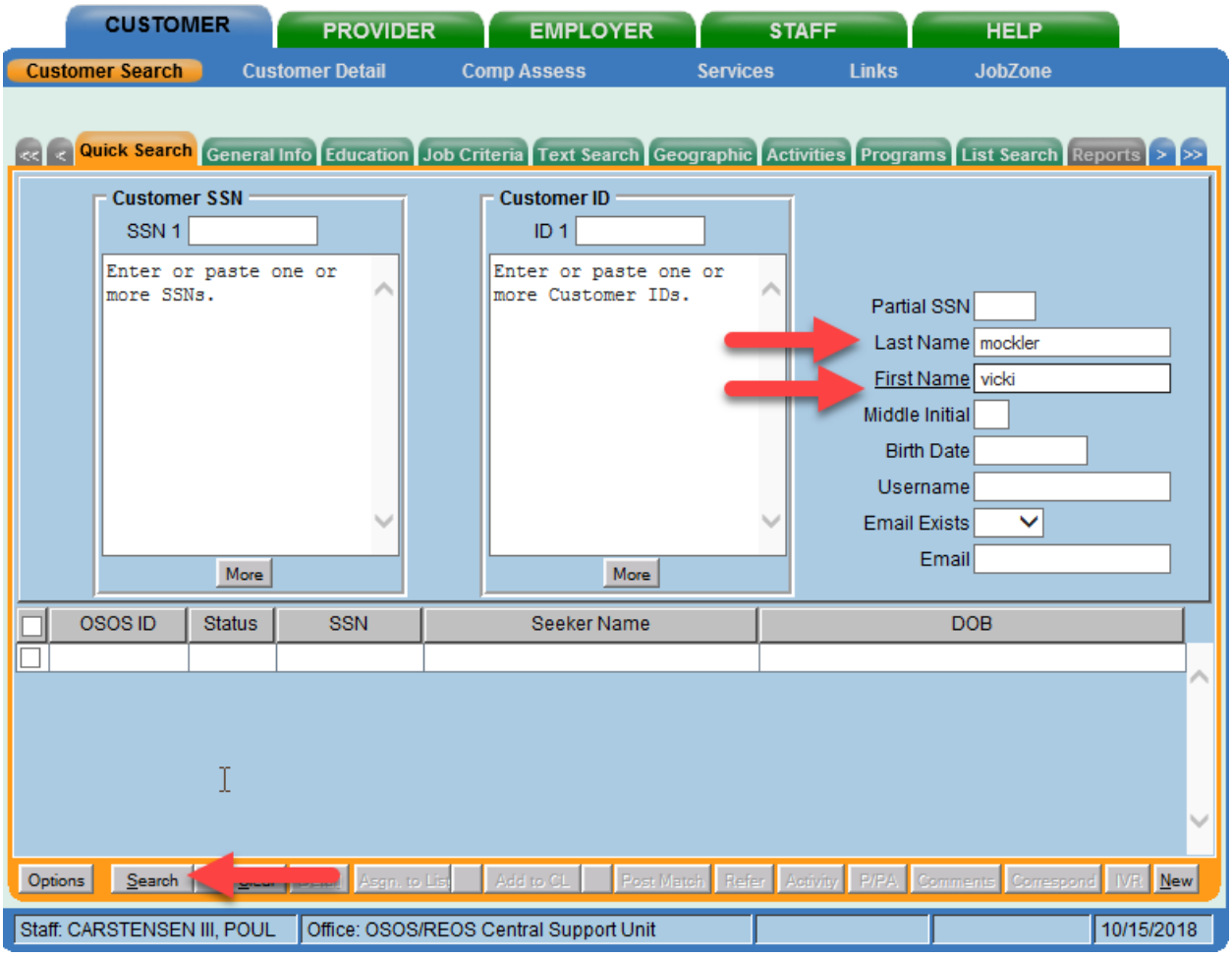
After ensuring that the training provider information is in OSOS, staff may record participant data relevant to the services being provided. If training provider information is needed, it can be entered using the step-by-step instructions found in the OSOS guide located here:

https://labor.ny.gov/workforcenypartners/osos/OSOS-Guide-Creating-Providers-Services-and-Offerings.pdf

Please note that if activities were previously documented and now appear in OSOS as functionally aligned services, staff are not required to reenter them as a new service in order to attach TET funding. Rather, staff should remove the Dislocated Worker funding associated with the functionally aligned service and replace it with Trade and Economic Transition DWG 2018 funding.

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.

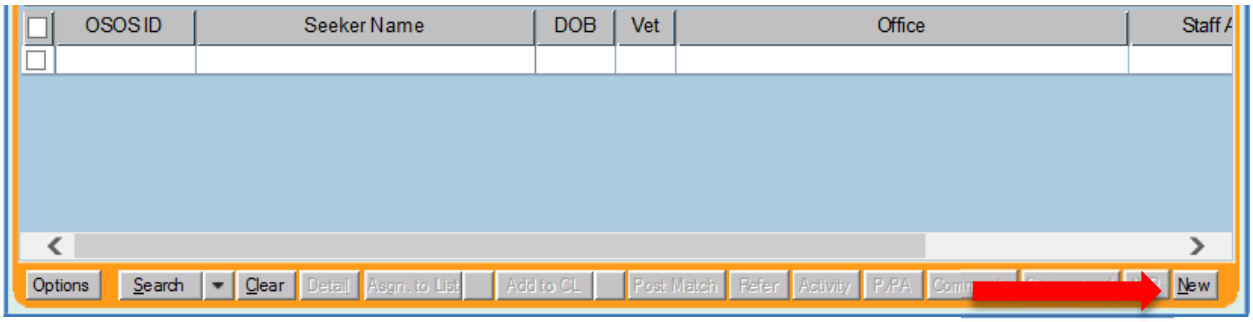


If a customer name search returns multiple records for the same customer, contact the OSOS help desk at help.osos@labor.ny.gov or 518-457-6586 to determine which record should be used.

If no matches are found, you will need to create a new record for the customer in OSOS, as customers served under this grant must be registered with NYS's Career Centers. Instructions for creating a basic customer record can be found in detail here:

https://labor.ny.gov/workforcenypartners/osos/Creating-a-Basic-Customer-Record-OSOS-Guide-12-10-2018.pdf

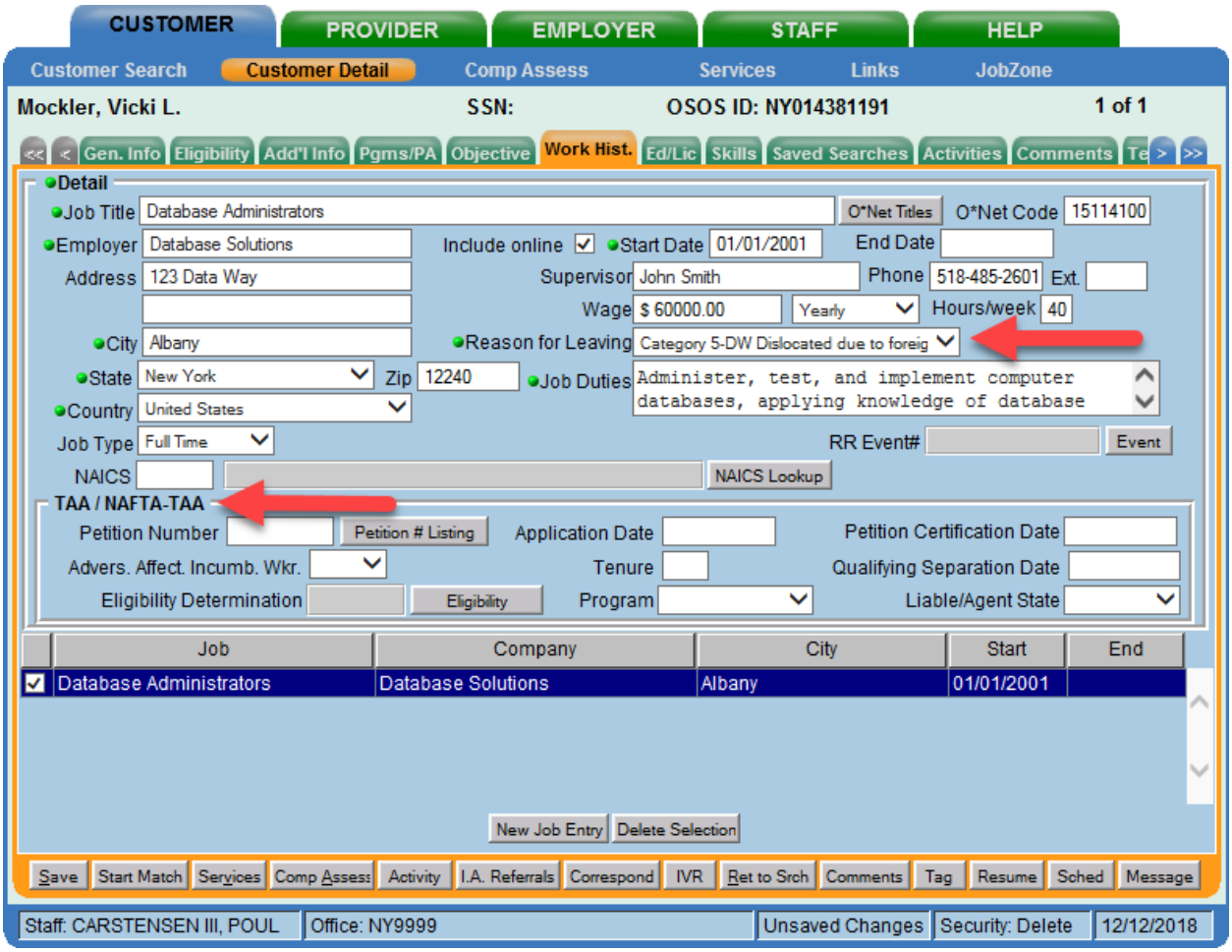
To do this, click **New** at the bottom of the screen and fill in the necessary details in the **Customer Detail** tabs.



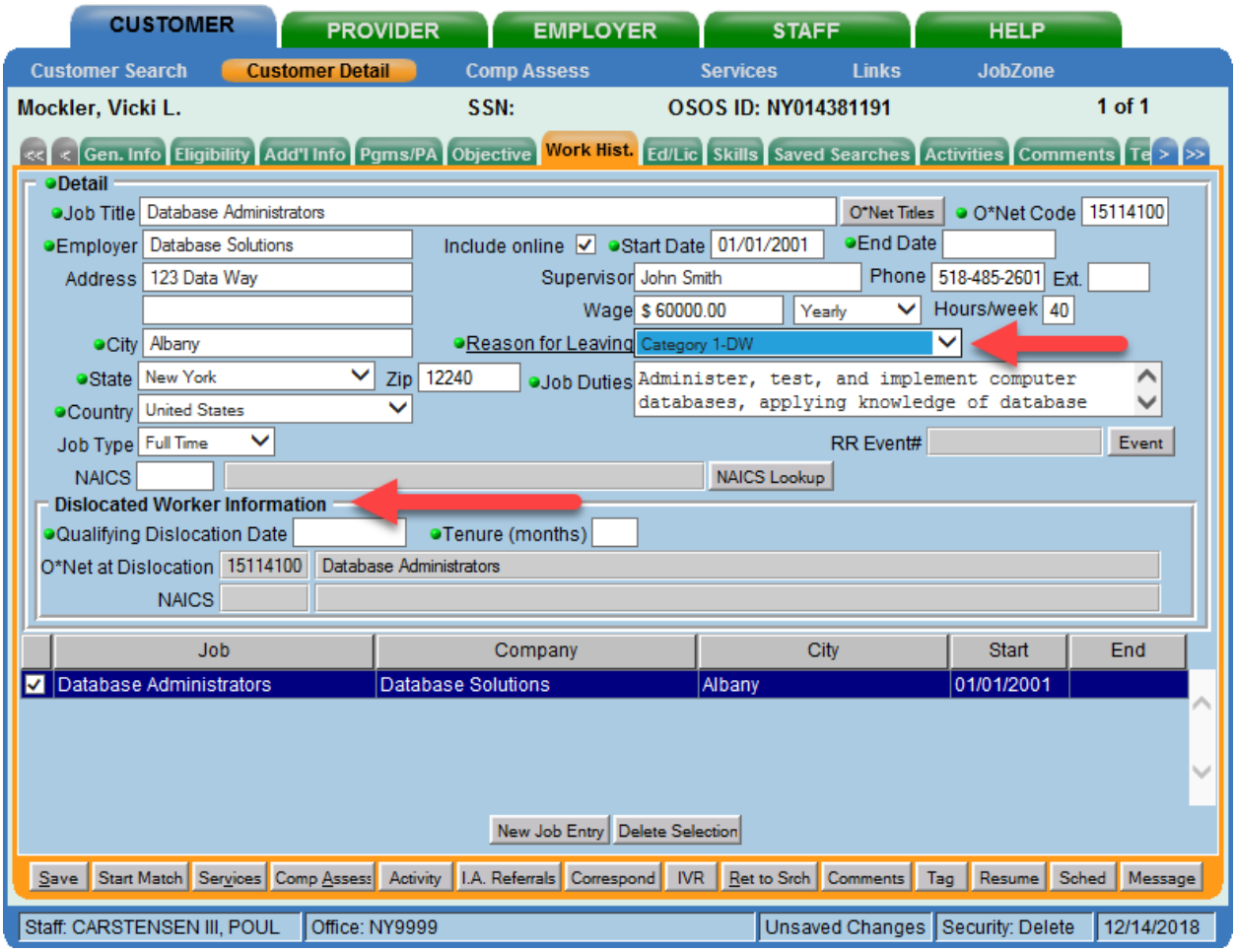
Please note that the customer must be documented as a dislocated worker to receive funded services under this grant. Following the checklist found at https://labor.ny.gov/workforcenypartners/PDFs/dislocated-worker-osos-checklist.pdf will ensure the customer is eligible. The OSOS fields for documenting Dislocated Worker status can be found in the **Customer** module, **Customer Detail** window, **Work History** tab.

Please note, while the screenshot below shows a dislocated worker who was dislocated due to foreign trade, this grant is available to all dislocated workers.

To properly document a dislocated worker, the Work History tab must be completed. Start and end dates must be provided, and Category 2 and Category 6 dislocated workers must have an O*Net code. In addition, each category of dislocated worker will have different required fields depending on the category selected. The customer listed below is a Category 5 DW Dislocated worker due to foreign trade, so the TAA/NAFTA-TAA section must be completed in the Work History tab.



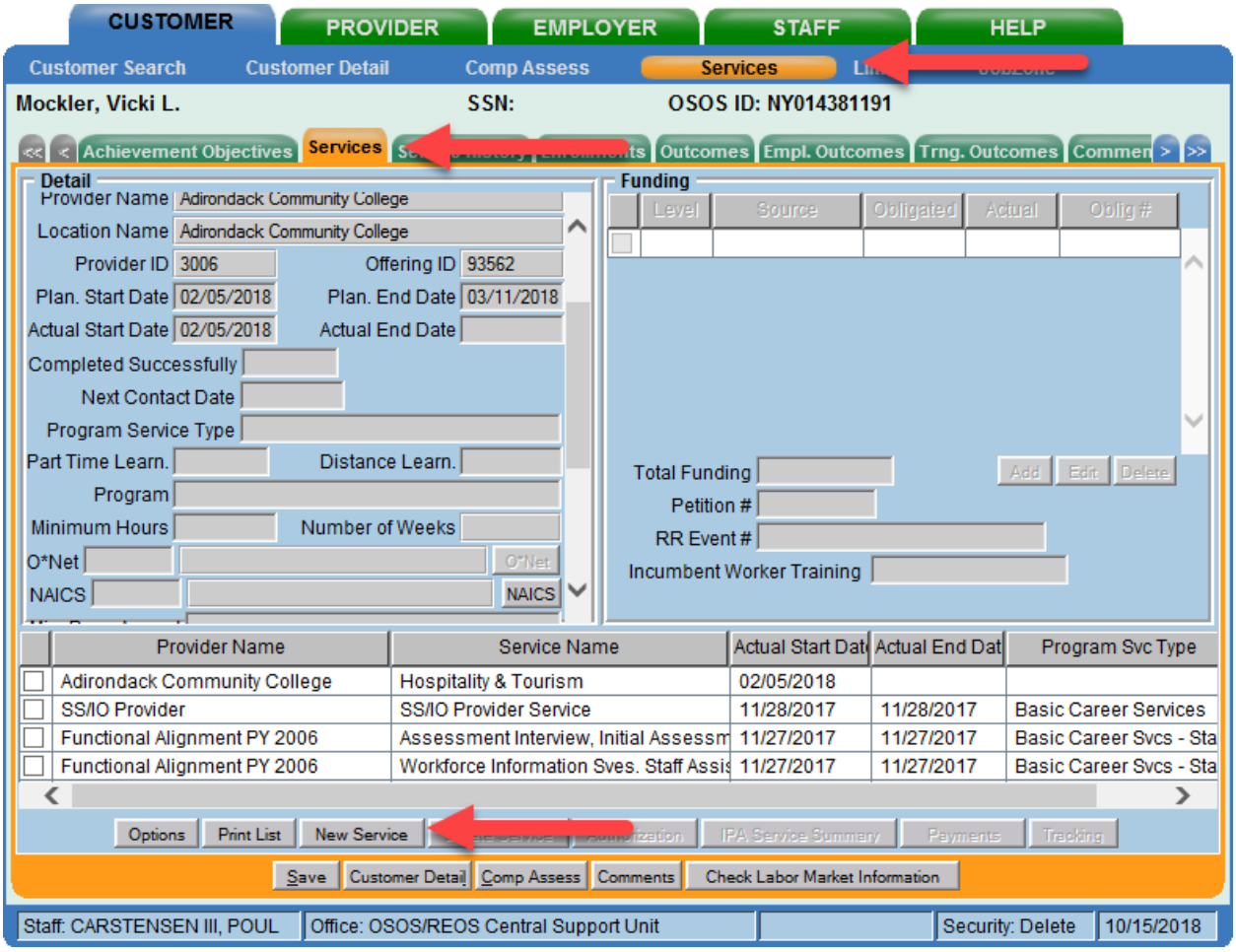
For Category 1 DW, Category 2 DW mass layoff or closure, Category 3 DW self-employed, and Category 6 DW spouse of a member of the Armed Forces customers, the Dislocated Worker Information section should be completed. Category 4 DW displaced homemaker, does not require additional data entry.



More information on documenting dislocated worker status and OSOS data entry assistance can be found in the Resources section at the end of this guide.

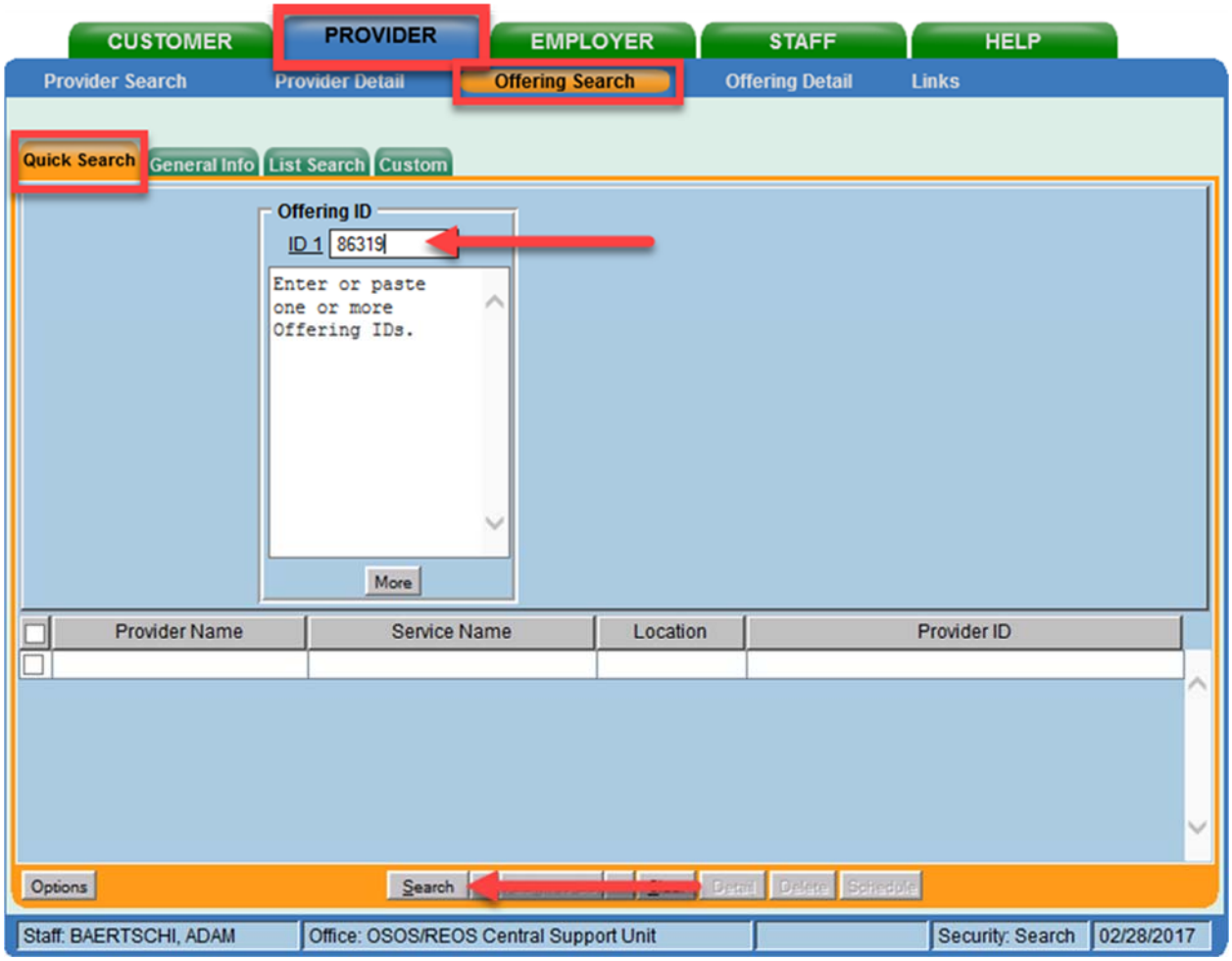
Once in the correct customer record, navigate to the **Services** window and then the **Services** tab of the customer record.

Click the **New Service** 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 automatically navigate 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**.

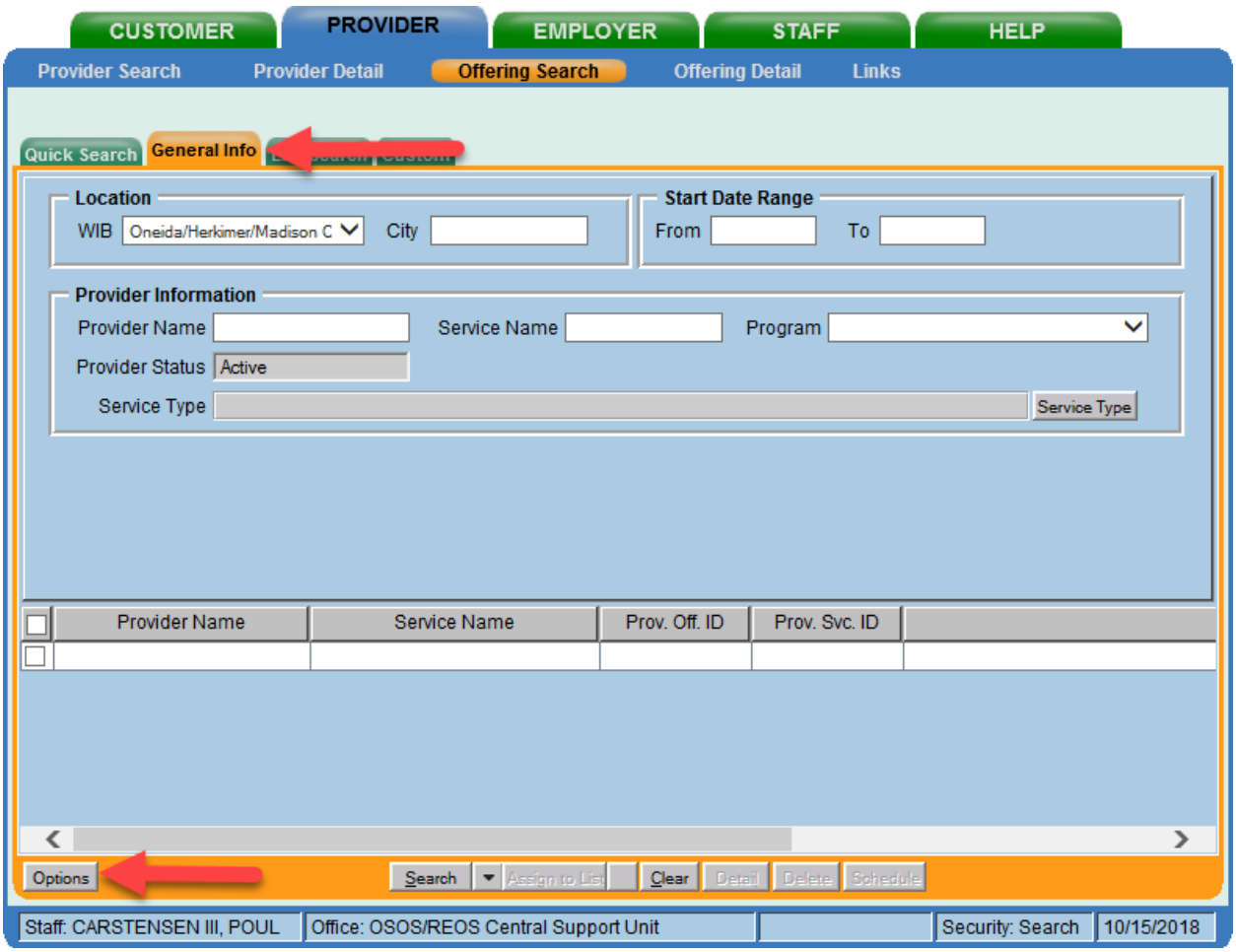


If you do not know the **Offering ID**, click the **General Info** tab to search by other criteria.

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

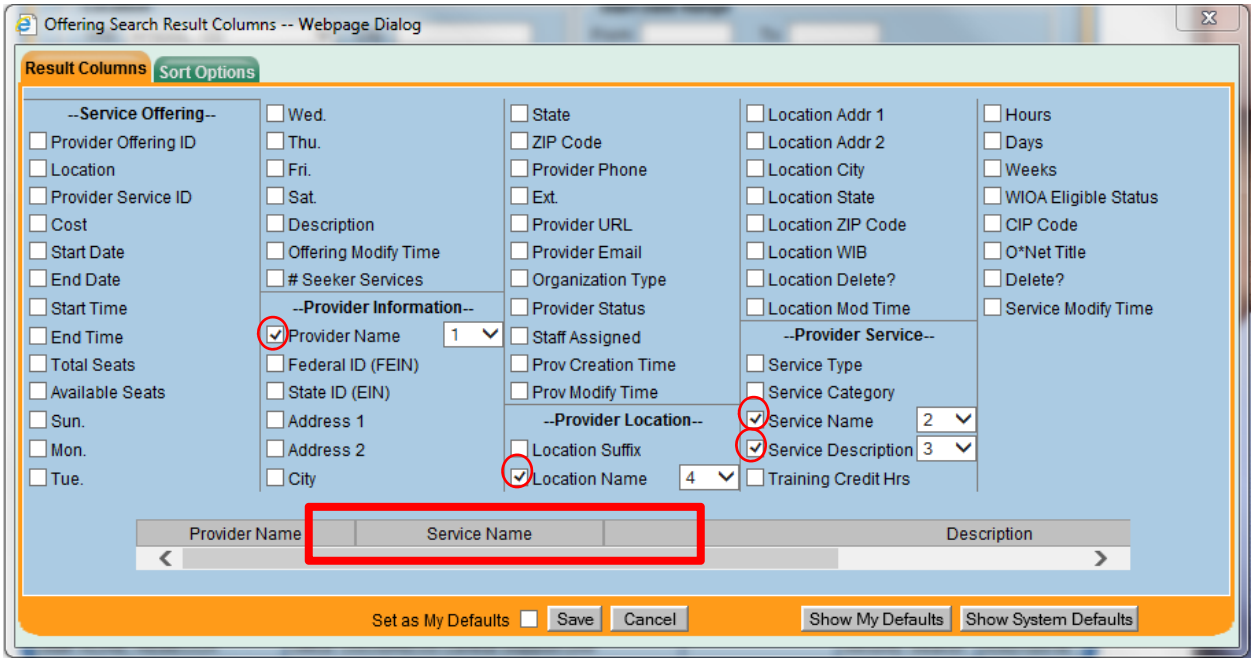
To help you determine whether a provider has been auto-loaded from the ETPL, the search options should be adjusted before conducting the search.

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. The Service Description is especially important because this field will indicate if the service was autoloaded from the ETPL.

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



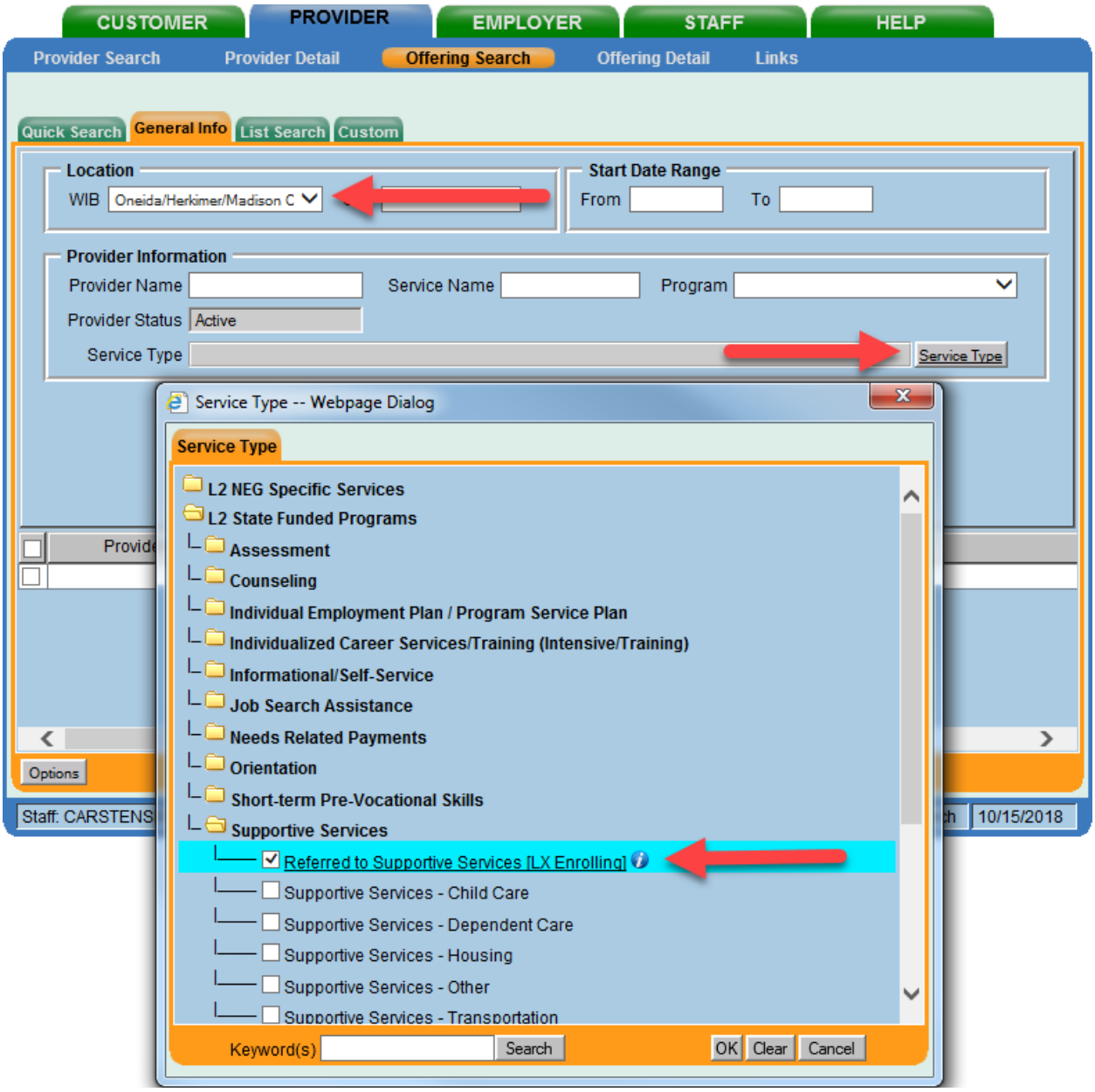
*You can check the box to "**Save My Defaults**" before you save so that you do not have to set these options each time you conduct a search.*

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

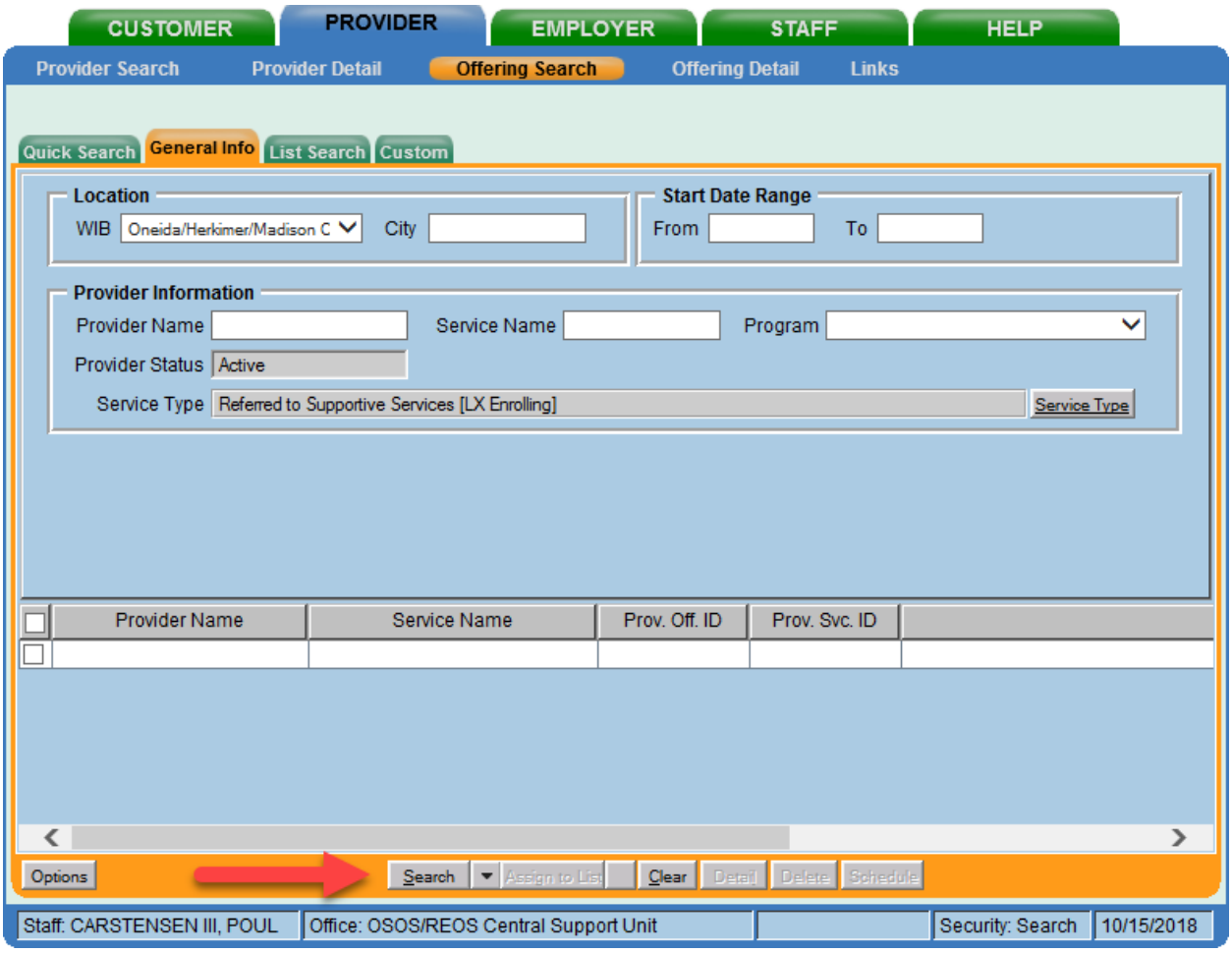
Enter any known information in the available data fields. OSOS will allow you to enter a partial name for the **Provider Name** and **Service Name** fields.

Then, click **Service Type**.

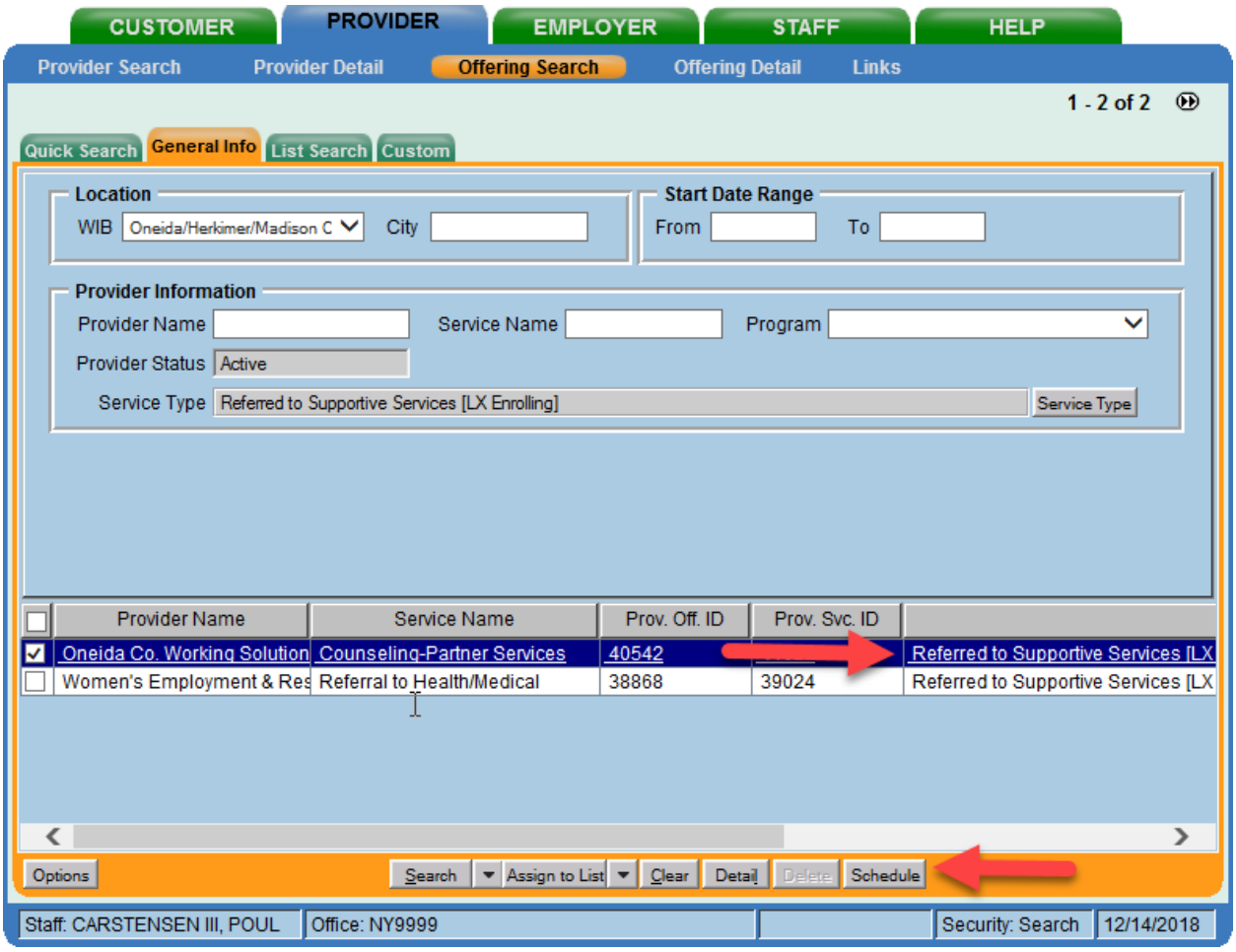
Select the appropriate **Service Type** from the pop-up dialog box. Click **OK.**



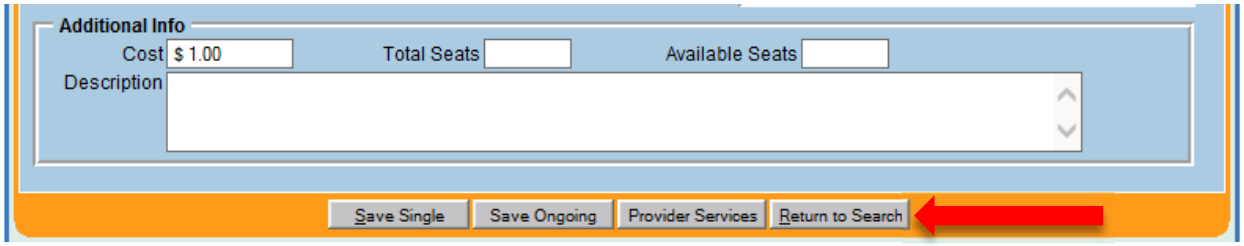
Once the search criteria have been entered, click **Search**.



The results will display in the bottom half of the screen. Select the appropriate Provider/Service from the results and click **Schedule.**

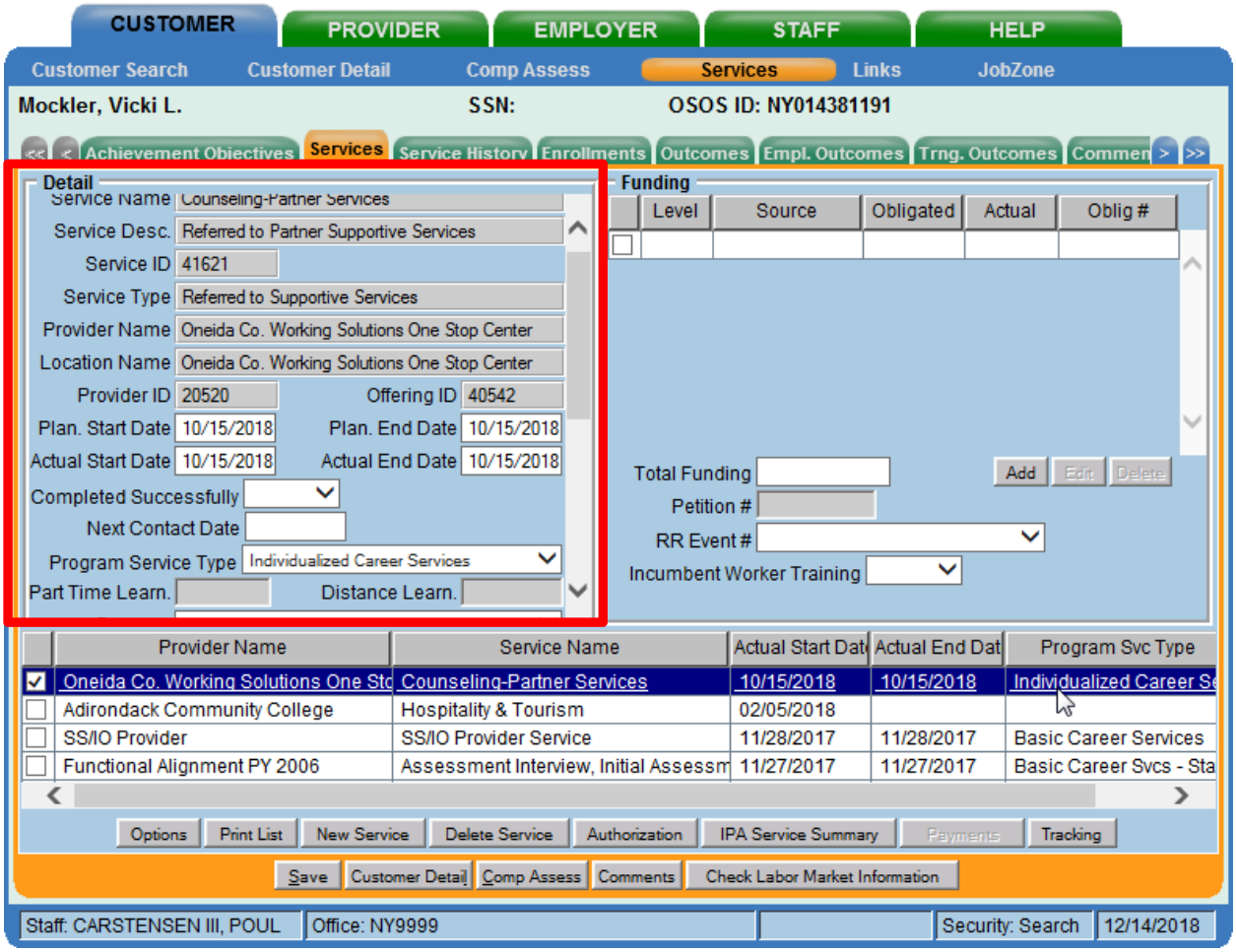


*If your search only returns one result, OSOS will navigate directly to the **Offering Detail** window for that provider. Click the **Return to Search** button at the bottom of the screen to navigate back to the **General Info** tab. This will allow you to schedule the service.*



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

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 – The O*Net code must be entered for a training service. 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.

ADD FUNDING

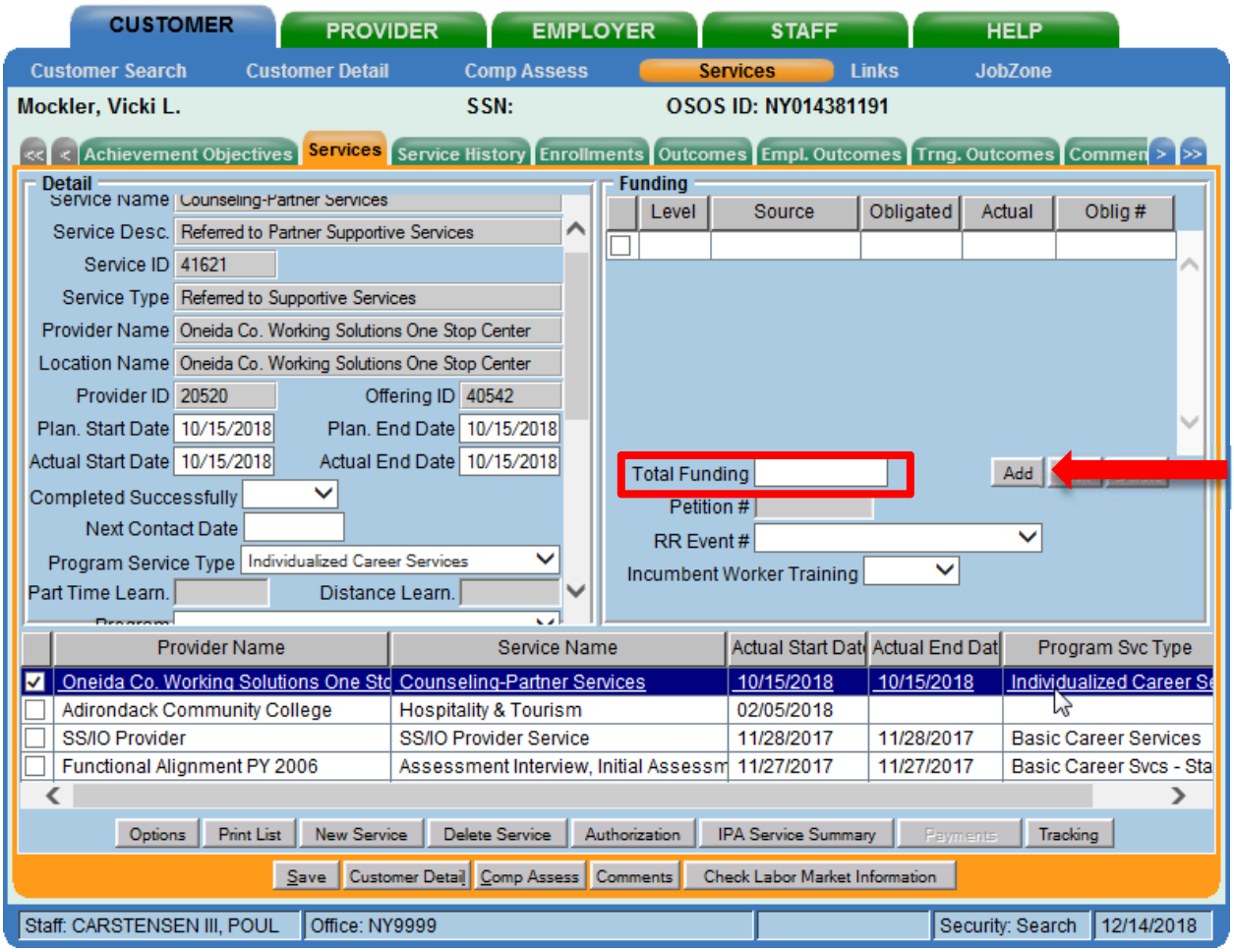
Next, complete the **Funding** section (right hand side) for the service.

Please note that if activities were previously documented and now appear in OSOS as functionally aligned services, staff are not required to reenter them as a new service in order to attach TET funding. Rather, staff should remove the Dislocated Worker funding associated with the functionally aligned service and replace it with Trade and Economic Transition DWG 2018 funding.

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

Click the **Add** button.

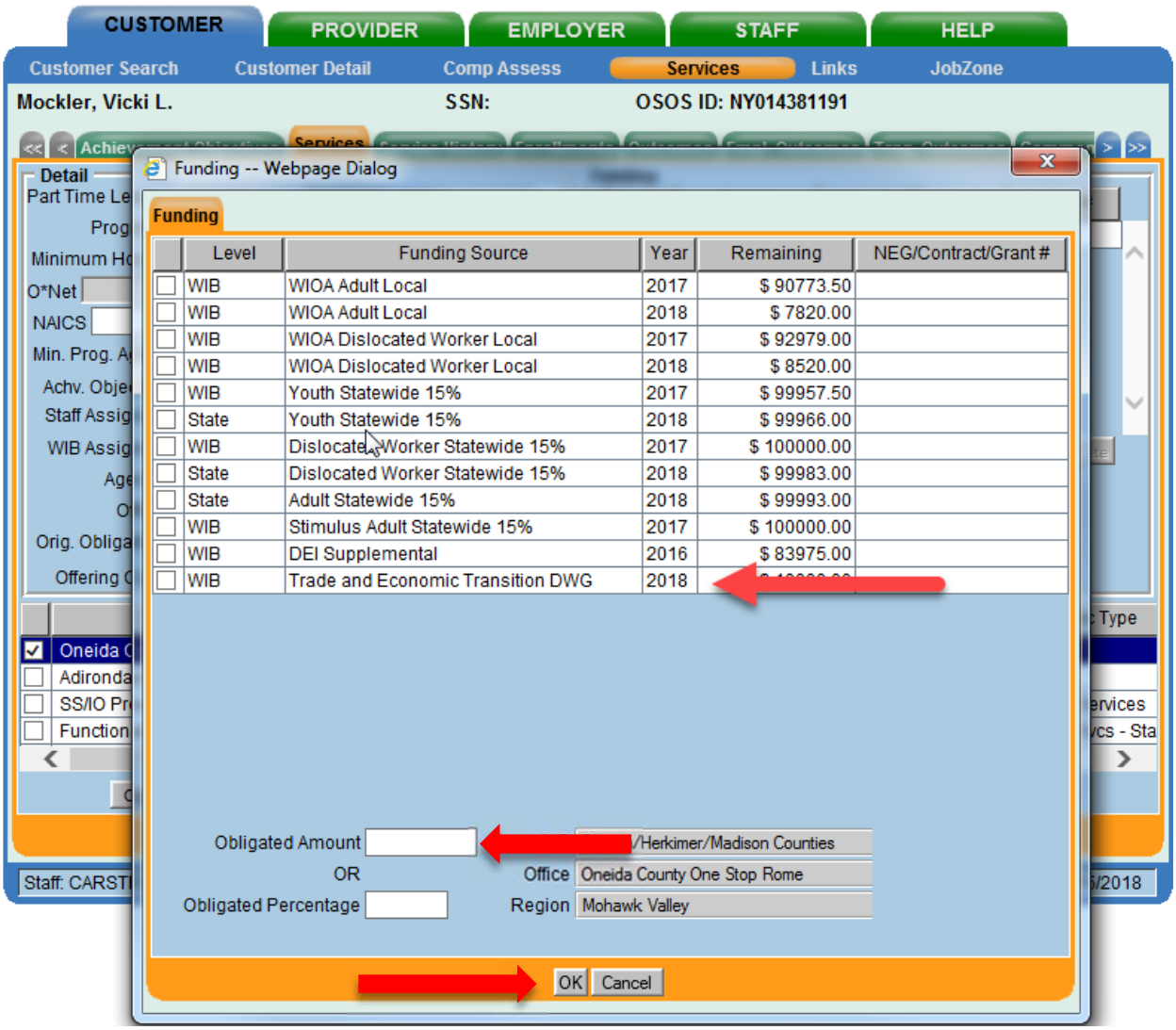
OSOS is not used as a financial tracking system. It is only used to track programmatic services provided. For this reason, the $1.00 entry acts as a placeholder so that the system will designate a funding source to be attached to the service. This allows the system to track services provided under this grant.



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

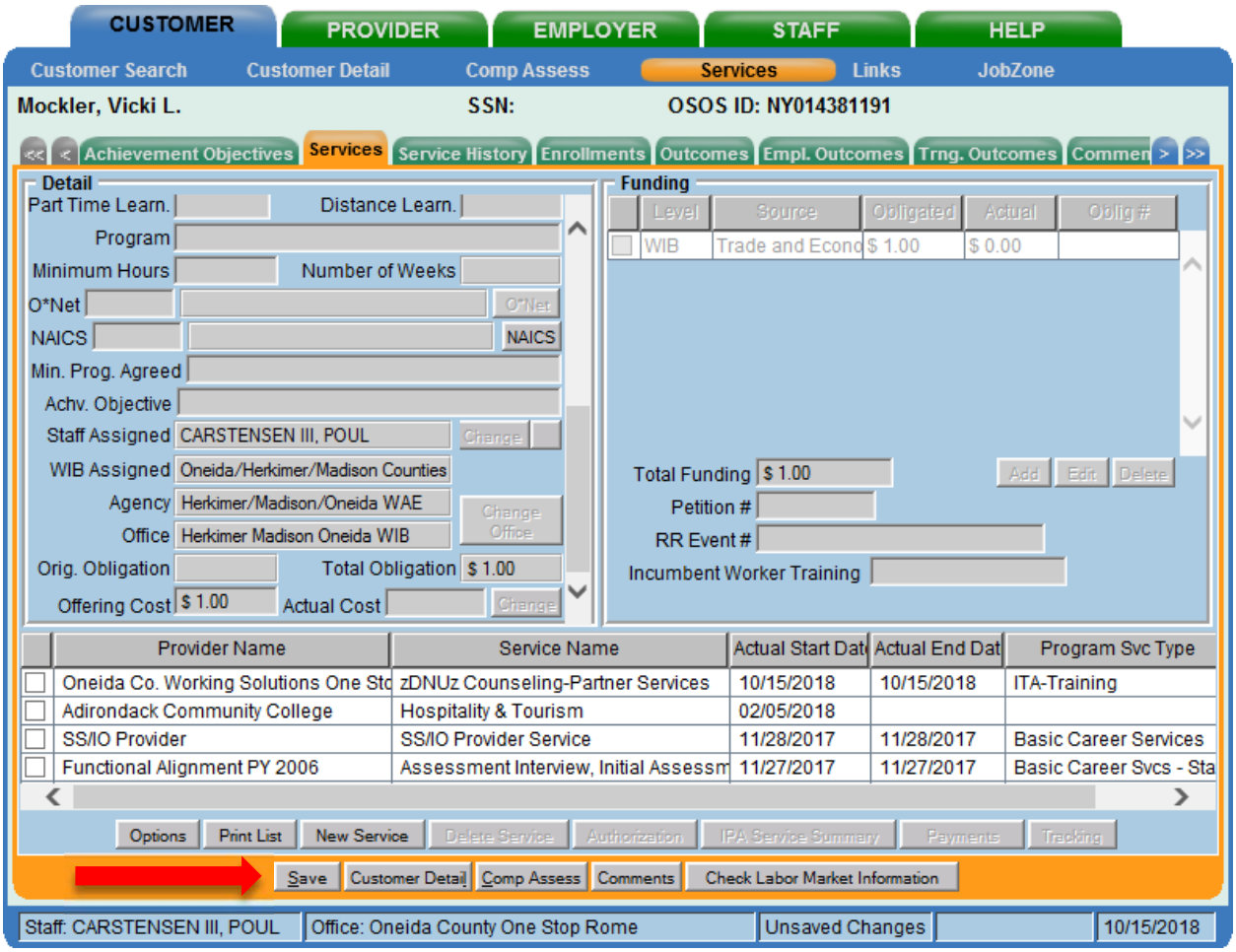
Check the box next to **Trade and Economic Transition DWG** to select that funding source.

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 of the screen.

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



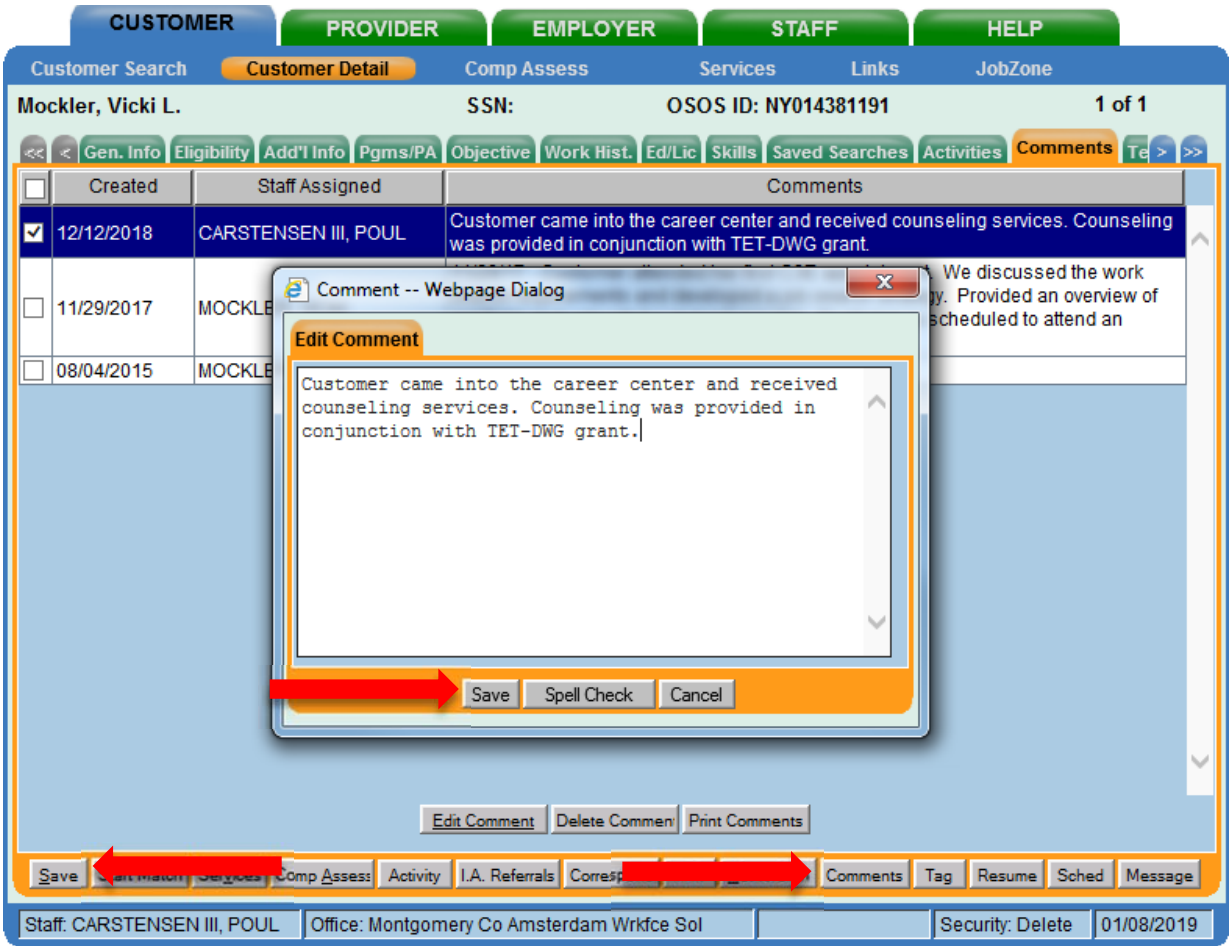
*The service must be closed when it has ended. To close a service, navigate to the **Customer** module, **Services** window, **Services** tab. Select the service that must be closed. Then enter the end date for the training service and click **Save**. The service is now closed.*

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 working with customers and providing services under the TET-DWG, training and employment data entry must be completed in the same manner as it is entered for WIOA customers receiving funded services. All training and employment outcomes must be documented in the Training and Employment Outcomes tabs.

Guidance on entering Training and Employment outcomes can be found at https://labor.ny.gov/workforcenypartners/osos/WIOA-Performance-Measures-and-Outcomes-Guide.pdf

RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found at:
https://labor.ny.gov/workforcenypartners/osos.shtm

Dislocated Worker Checklist
https://labor.ny.gov/workforcenypartners/PDFs/dislocated-worker-osos-checklist.pdf

OSOS Guide: Creating a Basic Customer Record
https://labor.ny.gov/workforcenypartners/osos/Creating-a-Basic-Customer-Record-OSOS-Guide-12-10-2018.pdf

OSOS Guide: Creating Providers Services and Offerings
https://labor.ny.gov/workforcenypartners/osos/OSOS-Guide-Creating-Providers-Services-and-Offerings.pdf

OSOS Guide: WIOA Performance Measures and Outcomes
https://labor.ny.gov/workforcenypartners/osos/WIOA-Performance-Measures-and-Outcomes-Guide.pdf

TEGL 2-18: https://wdr.doleta.gov/directives/attach/TEGL/TEGL_2-18_acc.pdf

For further assistance, please contact the OSOS Help Desk:
By phone: (518) 457-6586
By email: help.osos@labor.ny.gov