

# **NYOSOS**

## **Data Entry Quick Guide**

For

### **On-the-Job Training**

## **National Emergency Grant**

# **(OJT/NEG)**

**\*\* National Emergency Grant (NEG NY09) - ARRA - OJT \*\***

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## **Desk Guide Description**

This quick guide is designed to be used by someone who is knowledgeable in NYOSOS data entry and provides pertinent information regarding the entry of customer data and services funded by the NEG ARRA – OJT.

A more complete guide is available through the NYS DOL One-Stop Operating System webpage:

<http://www.labor.state.ny.us/workforcenypartners/osos.shtm>.

A Program Guidance letter is available:

[http://www.labor.state.ny.us/workforcenypartners/OJT\\_NEG.pdf](http://www.labor.state.ny.us/workforcenypartners/OJT_NEG.pdf).

A list of the LWIAs participating in this grant is available:

<http://www.labor.state.ny.us/workforcenypartners/osos.shtm>.

*Some field names in the desk guides are abbreviated, to match how they are displayed in NYOSOS. The graphics used in the guides are from fabricated test cases and not indicators of true customer records at the time of publication.*

This guide assumes that the Due Diligence procedure and NOA request have been approved by Central Office staff.

- Due diligence requests for OJT programs must be e-mailed to [OJTDueDiligence@labor.ny.gov](mailto:OJTDueDiligence@labor.ny.gov).
- The Notice of Obligational Authority (NOA) Request forms for NEG (09) ARRA – OJT funding must be e-mailed to [OJT-NEG@labor.ny.gov](mailto:OJT-NEG@labor.ny.gov).

NYOSOS is a case management system designed to describe a process in which services are provided to jobseeker and employer customers. This process must detail a story that includes the assessment of a situation and a specific plan of action to achieve measurable goals.

Matching a trainee to an OJT with an employer requires a sequential data entry process in NYOSOS:

1. The Employer information must be data entered into NYOSOS
2. The Employer must be data entered as a Provider
3. The Provider must then have specific service or multiple services called Offering(s) data entered into NYOSOS.

## Business Data Entry (Employer Activities)

To see if an employer is already entered into NYOSOS, navigate to the **Employer** module, **Employer Search** window, and **General Info** tab. The search automatically defaults to **Active** employers. Change the default setting to **Null**, which is the blank space. This will allow you to search for the employer whether that employer is active or inactive.

When searching by name, enter the first few letters of the employer and click the **Search** button. Because the employer name may be entered different ways, you may need to enter variations of the name. This will also account for misspellings. For example, a business may be data entered beginning with the word “The” such as “The Children's Village” or without the word such as “Children's Village”.

The screenshot displays the NYOSOS Employer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search (selected), Employer Detail, Job Order Search, and Job Order Detail. The page shows '1 - 1 of 1' results. The 'General Info' tab is active, showing a form for 'The Children's Village'. The 'Status' dropdown menu is highlighted with a red box. Below the form is a table with one row of data.

Employer	Staff Assigned	Office	SEIN	City	Created	Age
<input checked="" type="checkbox"/> The Children's Village	zzzPARKER, MARILYN	PEEKSKILL	04597340-00	Dobbs Ferry	01/14/2003	2946

At the bottom of the interface, there are buttons for: 25 (dropdown), Search, Clear, Detail, Print List, Comments, Correspond, Assign to List, Show Contacts, and New.

Make sure the employer information throughout the **General Info**, **Additional info**, and the **Contact Info** tabs is complete and correct.

At any time the user may enter an activity by clicking the gray **Activity** button at the bottom of the page.

The screenshot shows a web application interface for employer management. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail (selected), Job Order Search, and Job Order Detail. The main header displays 'The Children's Place' and 'ID: NY007846299' with '1 of 1' on the right. A secondary set of tabs includes General Info (selected), Additional Info, Contact Info, Rapid Response, Comments, Profile, Activity, and Job Orders. The main content area is a form with various fields: Status (Active), Company (The Children's Place), Legal Name, State EIN (08011160-00), FEIN (31-1241495), Location Suffix, Tax Class, Address (248 W 125th St), City (New York), County (New York), Phone (212-866-9616), Alt. Phone, Email, NAICS (448130 - Children's and Infants' Clothing Stores), Ownership, and Create Date (09/23/2008). A sidebar on the right contains fields for WIB (New York City), Agency (Department of Labor), Office (NY514-HARLEM), Staff Assigned (TORRES, HECTOR), and Emp. Rel. Rep. Each sidebar field has a 'Change' button. At the bottom of the form, there are buttons for Save, Activity (highlighted with a red box and a yellow arrow), New Job, Return to Search, and Comments.

Data enter any activity provided to the employer. The Contact person's name and that day's date will automatically populate the **Employer Activity - - Webpage Dialog** box. The Contact has a drop down list for multiple contacts and you may add comments into the Comments box. The Activity Date is editable. You may then select the appropriate activity.

Employer Search    **Employer Activity -- Webpage Dialog**    1 of 1

**Econolodge**

**General Info**    **Additional Info**

● Status Active

● Company Econolodge

Legal Name

State EIN

Location Suffix

● Address 439 Canada S

● City Lake George

● County Warren

Phone 518-668-2689

Alt. Phone 518-668-5118

Email

● NAICS 721110

Ownership Private/Corporate

Desired

**Activities**

- Business Contact - Onsite
- Business Contact - Email/ Mail/ Telephone
  - EMT - Overview of Services
  - EMT - Recruiting Assistance
  - EMT - On the Job Training (OJT)
  - EMT - SMART2010
  - EMT - WOTC
  - EMT - HIRE Act
  - EMT - Layoff Aversion
  - EMT - Shared Work Presentation
  - EMT - Succession Planning
  - EMT - Career Fair
  - EMT - Human Resources Consulting
  - EMT - Incumbent Worker Training
  - EMT - Federal Bonding Program
- Business Associations
- Economic Development
- Self-Employment Assistance
- Rural Employment Services

Contact Moore, Dottie

Activity Date 02/07/2011

Change Office

Change

Change

12845

Keyword(s)    Search    OK    Cancel

## Provider, Services and Offering

This information must be entered in sequential order: Provider, Service, and then Offering.

The Local assignee or OJT Coordinator will be authorized to data enter the **Provider** and **Offering** information when the information is not already in NYOSOS.

### Provider



**The Provider is the employer that will provide the OJT.**  
**The Provider's location is the LWIA funding the OJT.** Listing the LWIA as the location is necessary for federal reporting purposes.

Navigate to the **General Info** tab found in the **Provider Search** window of the **Provider** module. A search may be customized in numerous ways such as selecting the LWIB name from the drop down list. The search is similar to what was described in the previous Employer section.

If the employer's name is not entered in NYOSOS as a Provider, then click the **"New"** button to create a new provider record.

The screenshot shows the NYOSOS interface for the Provider Search window. The top navigation bar includes tabs for CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below this, there are sub-tabs for Provider Search, Provider Detail, Offering Search, and Offering Detail. The 'General Info' sub-tab is selected. The main form area contains fields for Status, Provider Name (The Children's Village), City, Service Category, Service Type, CIP Code, Organization Type, Federal Provider ID (FEIN), and State Provider ID (EIN). A 'WIB' dropdown menu is highlighted with a red box. At the bottom, there is a table with columns for Provider ID, Provider Name, City, and Organization Type. The table contains one entry: 69717, The Children's Village, Dobbs Ferry, Non-profit. A 'New' button is highlighted with a red box and a yellow arrow.

Provider ID	Provider Name	City	Organization Type
69717	The Children's Village	Dobbs Ferry	Non-profit

Complete and update all information in the **Provider Detail** tabs.

CUSTOMER   **PROVIDER**   EMPLOYER   STAFF   HELP

Provider Search   **Provider Detail**   Offering Search   Offering Detail

Furniture Fantasies      ID:      1 of 0

General Info   Contact Info   Services   Service Performance   Comments

**Provider Info**

Provider Status: Active

Federal ID (FEIN):

State ID (EIN):

Organization Type:

Provider Name: Furniture Fantasies

Provider Phone: 518-457-1111    Ext:

Provider URL:

Provider Email: furniturefantasies@yahoo.com

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**Billing Address**

Street Address (line1): Happyland Road

Street Address (line2):

City: Albany

State: New York

Zip Code: 12240

**Locations**

Location Name:

Street Address (line1):

Street Address (line2):

City:

State:

Zip Code:

Location Suffix:

WIB:

Location

New Location   Delete Location   Copy Address   Show Deletes

For an existing Provider, the listed location(s) will usually include the actual sites where the Provider does business.

If the LWIB funding the OJT is not listed as an available location, then click on **New Location** and complete the data fields in this section.

The screenshot shows the 'Provider Detail' page for 'Furniture Fantasies' (ID: 69975). The 'Locations' section is highlighted with a red box. It contains the following fields:

- Location Name: Chautauqua Works
- Street Address (line1): 407 Central Avenue
- Street Address (line2):
- City: Dunkirk
- State: New York
- Zip Code: 14048
- Location Suffix:
- WIB: Chautauqua County

Below the form is a table with one entry: 'Chautauqua Works' (checked). At the bottom of the section are buttons: 'New Location', 'Delete Location', 'Copy Address', and 'Show Deletes'.

Add **Contact** Information:

The screenshot shows the 'Provider Detail' page for 'Furniture Fantasies' (ID: 69975). The 'Contact Info' section is highlighted with a red box. It contains the following fields:

- First Name: Mister
- Last Name: X
- Title:
- Location: Furniture Fantasies
- Phone: 518-457-1111
- Ext:
- Fax:
- Email: Mister.X@furniturefantasies.com
- Staff Assigned: (Change button)

Below the form is a table with one entry: 'X, Mister' (checked) at 'Furniture Fantasies' with phone '518-457-1111'.

# Services

Navigate to the **Services** tab and complete the data fields. This is required before creating the offering.

1. Click the **New Service** button.
2. Click the **Service** button.

The screenshot shows the 'Services' tab in a web application. The 'New Service' button is circled with a blue callout '1' and a red box. The 'Service' button is circled with a blue callout '2' and a red box. The form contains fields for Service Category, Service Type, Service Name, Description, Service ID, Training Credit Hours, Total Service Length (Weeks, Days, Hours), O\*Net Title, and CIP Code. A table below the form has columns for Category, Service Type, Service Name, and Description.

Service Category is **Training**  
Service Type is **On the Job Training (OJT)**

The screenshot shows the 'Service Category/Type Selector' dialog box. The 'Training' folder is selected and highlighted with a red box. The 'On the Job Training (OJT)' option is selected and highlighted with a red box.

Click **OK**.

The **Service Name** is **NEG ARRA – OJT**.

The **Description** is the occupational title followed with the letters **OJT**.

For example: **Metal Furniture Assembler – OJT**.

Select the appropriate **O\*Net Title**.

**CUSTOMER** **PROVIDER** **EMPLOYER** **STAFF** **HELP**

Provider Search **Provider Detail** Offering Search Offering Detail

Furniture Fantasies ID: 69975 1 of 1

**General Info** **Contact Info** **Services** **Service Performance** **Comments**

**Service Detail**

- Service Category: Training
- Service Type: On the Job Training (OJT)
- Service Name: NEG ARRA - OJT  Not approved
- Description: Metal Furniture Assembler - OJT
- Service ID: 88147
- Total Service Length: Weeks  Days  Hours
- O\*Net Title: 51209399 Assemblers and Fabricators, All Other
- CIP Code

Category	Service Type	Service Name	Description
<input checked="" type="checkbox"/> Training	On the Job Training (OJT)	NEG ARRA - OJT	Metal Furniture Assembler - OJT

Click **Save**.

# Offering

Click the **New Offering** button.

**CUSTOMER** **PROVIDER** **EMPLOYER** **STAFF** **HELP**

Provider Search **Provider Detail** Offering Search Offering Detail

Furniture Fantasies ID: 69975 1 of 1

**General Info** **Contact Info** **Services** **Service Performance** **Comments**

**Service Detail**

- Service Category: Training
- Service Type: On the Job Training (OJT)
- Service Name: NEG ARRA - OJT  Not approved
- Description: Metal Furniture Assembler - OJT
- Service ID: 88147
- Total Service Length: Weeks  Days  Hours
- O\*Net Title: 51209999
- CIP Code:

Category	Service Type	Service Name	Description
<input checked="" type="checkbox"/> Training	On the Job Training (OJT)	NEG ARRA - OJT	Metal Furniture Assembler - OJT

Click the drop down list to identify available locations. Select the appropriate LWIA that is funding the OJT.

Check the box for Monday as the day of the week that the OJT will start.

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

The screenshot shows a web application interface for managing offerings. At the top, there are navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search, and Offering Detail (selected). The main header displays 'NEG ARRA - OJT', 'Offering ID: 95916', and '1 of 1'. The 'General Info' section contains several fields: Provider Name (Furniture Fantasies), Service Category (Training), Service Type (On the Job Training (OJT)), and Service Description (Metal Furniture Assembler - OJT). The 'Location' section includes a dropdown menu (Chautauqua Works), Address (407 Central Avenue), City (Dunkirk), State (New York), Zip (14048), and WIB (Chautauqua County). The 'Schedule' section has fields for Start Date, End Date, Start Time, and End Time, and a row of checkboxes for days of the week: Sun., Mon., Tue., Wed., Thu., Fri., Sat. The 'Additional Info' section has fields for Cost (\$1.00), Total Seats, and Available Seats, and a Description text area. At the bottom, there are buttons: Save Single (highlighted with a red box), Save Ongoing, Provider Services, and Return to Search. Red and yellow arrows point to the 'Mon.' checkbox and the 'Cost' field, respectively.

Click **Save Single**.

If you have additional concerns regarding data entry for a new provider and/or offering, please refer to the following desk guide:

<http://www.labor.state.ny.us/workforcenypartners/osos/deskguideprovider.pdf> or contact the OSOS Help Desk at (518) 457-6586 or via email at [Help.OSOS@labor.ny.gov](mailto:Help.OSOS@labor.ny.gov)

# Participant Data Entry

## Customer Search Window

Search for the customer using either the social security number or the customer's name (see search instructions in the **Desk Guide for the Customer Module of OSOS**).

## Customer Detail Window



**Please note:** If the customer record exists in NYOSOS, review and update any, and all, appropriate information throughout the **Customer Detail** window.

The screenshot shows the 'Customer Detail' window for customer Malinak, State-Grant. The window has tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The 'Customer Detail' tab is active. The customer's SSN is NY009679278. The 'Gen. Info' tab is selected, showing fields for SSN, Username, Last Name, Date of Birth, Address, City, State, Zip Code, Country, Phone, Email, and U.S. Citizen status. The 'Customer Assignment' section shows Staff Assigned (Sutherland, Don), WIB Assigned (NYSDDL - CO), Agency (Department of Labor), Office (OSOS/REOS Central Support Unit), and Registered date (01/23/2008). The 'Employment Status' dropdown is set to 'Not Employed'. The 'Ethnic Heritage' and 'Race' sections have 'Not Disclosed' selected. The 'Education & Employment' section shows Education Level (12 Grade - HS Graduate) and School Status (Not attending school: H.S. Graduate). The 'Contact Preferences' section has 'Use Postal', 'Pri. Phone', and 'Alt. Phone' checked.

**Potential Trainees must be unemployed for 27 weeks or more, and therefore qualify as Dislocated Workers.** Check the Employment Status in the **Gen. Info** screen and that the separation date listed in the Customer's work history is January 1, 2008 or later.

Check the **Dislocated Worker** item in the **Programs/Public Assistance Selection** section in the **Add'l Info** tab. Add in the date that the customer first received WIA funded services.

Selective Service is required for every male that is 18 through 25 years of age born subsequent to 12/31/1959.



Potential Trainees should use **JobZone** to develop a list of skills.

<https://www.nyjobzone.org/jobseeker/login.do?url=%2Fjobseeker%2Fportfolio%2Findex.jsp>

NEW YORK STATE  
David A. Paterson  
Governor  
New York State Department of Labor  
Colleen C. Gardner  
Commissioner  
JobZone  
Unemployment Benefits | Career Services | Business Services | Workforce NY Partners | Workforce & Industry Data | Worker Protection | Forms and Publications | FAQs  
Help | Contact | About  
**Personalize and Refine Your Job Search**  
Create your free account to:  
• Build and store resumes  
• Explore occupations  
• Identify your strengths, skills and talents  
• Search education and training databases  
Click Here For a FREE Account  
Please Sign In Below  
Username:   
Password:   
Login  
Forgot your password?  
Click here for reminder.  
**Who's Getting Hired**  
Jobs with the most expected openings this month in New York State include:  
• Telephone Operators  
• Meeting and Convention Planners  
• Word Processors and Typists  
• Parking Enforcement Workers  
• Physical Therapist Aides  
The New York State Department of Labor is an Equal Opportunity Employer/Program.  
Auxiliary aids and services are available upon request to individuals with disabilities.  
Home | Privacy Policy | About | Help

A list of useful skill words and phrases can be downloaded from the following website: <http://www.workforcenewyork.org/OSOS/jobmatchingskills.pdf> that can be entered into the **Customer Detail** window > **Skills** tab > **Additional Skills** text field. This text field is used during the job matching process.

Customers receiving Intensive Services and training require additional Data Element Validation (DEV) activity per TA 08-8 and TEGL 31-09. A new Date of birth **DEV** tab and desk guide are available.

The screenshot shows a software interface with a top navigation bar containing tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with tabs for Customer Search, Customer Detail (selected), Comp Assess, and Services. The main content area displays customer information for Malinak, State-Grant, with SSN and OSOS ID. A 'DEV' tab is active, showing a table with columns for DMV # and DOB. To the right is a 'Data Element Verification' form with several sections: 'Customer Detail' (DMV #, Linked Date of Birth), 'Record Sent' (DOB Sent), 'Process Response' (Match Found, Match Not Found), and 'Other Verification Sources' (UI DOB, Verification Source dropdown). Buttons for 'Add', 'Delete', 'Print List', 'Help', 'Print Record', and 'Audit' are visible at the bottom.

### Comp Assess(ment ) Window:

Be sure to update appropriate.

### Services Window



**National Emergency Grant (NEG) funded services must be data entered into NYOSOS as Level 2 (L2) services in the Services tab and linked to WIB Level NEG ARRA – OJT funds.**

**NEG ARRA – OJT funds from this program may only be used for the following services:**

- Training Services (OJT)**
- Supportive Services – Child Care**
- Supportive Services – Dependent Care**
- Supportive Services – Housing**
- Supportive Services – Transportation**
- Supportive Services – Other**

NEG ARRA – OJT funds are not to be used for **Needs Related Payments** in this program.

**Customers receiving training must have participated in an assessment and have developed an Individual Employment Plan (IEP) that supports the provision of training as detailed in Technical Advisories (TA) 08-4.1 and 09-17. Supporting comments must be entered into the Customer record.**

As these services are not being funded by the NEG ARRA – OJT monies, enter as Level 1 (L1) services, navigate to the **Customer Detail** window in the **Customer** module. Click the **Activity** button.

The **Training Addl Info** and **Addl Outcomes** tabs must be completed. Desk Guides are available for these two tabs.

When any service is completed, click the checkbox next to that service to highlight and enter the **Actual End Date** and **Completed** status.

### **Resources and Assistance**

Additional **desk guides and resources** can be found at:  
<http://www.labor.ny.gov/workforcenypartners/osos.shtm>.

For further assistance, please contact the following:

NYOSOS Help Desk  
[help.osos@labor.ny.gov](mailto:help.osos@labor.ny.gov)  
(518) 457-6586

O\*Net Resource Center website: <http://www.onetcenter.org/>