NYSERDA Green Jobs Green New York Training OSOS Guide

CONTENTS

PURPOSE

New York State Energy Research and Development Authority (NYSERDA) has selected 14 Community-Based Organizations (CBOs) and coalitions of Community-Based Organizations across the state to conduct grassroots outreach to encourage energy efficiency improvements and participation in training opportunities for green jobs with employers. This outreach should help create green job opportunities for the emerging, unemployed, dislocated jobseekers and incumbent workers. NYSERDA and NYSDOL will coordinate resources to ensure the success of Green Jobs Green New York (GJGNY) outreach by tracking the progress of potential trainees referred to the One-Stop System and to monitor the registration of Home Performance businesses that register with the One-Stop and participate with a Business Services Representative. Application to the program will be accepted until May 31, 2012. If One-Stop staff identifies an employer interested in applying for the program, the employer should be advised to submit their *Intent to Apply* via e-mail to PON2033@nyserda.org.

Due diligence for the contractors will then be completed by NYSERDA.

GJGNY includes customized classroom training (CRT) and/or on-the-job training (OJT), as well as registered apprenticeship programs. Businesses are expected to retain each new hire after the OJT is completed in ongoing full time employment. $1.8 million is available for OJT programs. Businesses hiring new workers that need OJT will be eligible to be reimbursed up to 50% of the newly hired employee's wages for a period of time appropriate for the employee to become proficient in the occupation with a maximum duration of 6 months. The maximum award per employee is $10,000 for OJT and $4,000 for CRT. The maximum award per employer is $50,000 for OJT and $20,000 for CRT.

Once a candidate is selected, a skills gap analysis will be completed and the written OJT plan developed by the NYSDOL Business Service Representative. The employer submits the completed application to NYSERDA. If approved, NYSERDA develops and implements the contract with the employer. NYSDOL monitors the training and conducts follow up.

Employers interested in offering training and employment that do not qualify for the NYSERDA GJGNY funded program should be considered for other funds available through the One-Stop Center.

OSOS DATA ENTRY
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Matching a trainee to an OJT with an employer requires a sequential data entry process in OSOS:

1. The business information must be data entered into OSOS as an employer.
2. The OJT is entered into OSOS in the form of a job order.
3. The business providing the OJT must be data entered as a provider in OSOS.
4. A separate provider service and associated offering must be created for each occupation offered with each employer through the OJT.
5. The customer record must exist for the job seeker to be referred to the job order and for the offering to be added as a service in the customer record.

DATA ENTRY FAST FACTS

- NYSERDA has contracted with CBOs and contractors to refer trainees to the One-Stop Center requiring data entry of an L1 State Specific Activity. Options include:
    - **GJGNY – CBO Referral to One-Stop**
    - **GJGNY – Referred to One-Stop by Contractor**
- Business Services staff in the One-Stop Centers will create the business and job seeker records into OSOS.
- Business Services staff in the One-Stop Centers will enter the business and job seeker activities, job orders and comments into OSOS.
- In OSOS, the provider for an OJT is the employer and the facility for CRT.
- In OSOS, the location for an OJT and CRT is the WIB funding the OJT.
- The **Service Category** for an OJT and CRT is **Training**.
- The **Service Types** are **On the Job Training (OJT)** or **Occupational Skills Training**.
- The **Service Name** for OJT is *NYSERDA – OJT* and for CRT *is NYSERDA – CRT*.
- The service **Description** is the occupational title followed with the letters OJT or CRT, whichever is appropriate. For example: *Electrician Helper – OJT*.
- The offering **Description** is *Specific Offering for a NYSERDA - OJT (2012) contract.*
- Funding is WIB level, WIA dollars equal to $0.00.

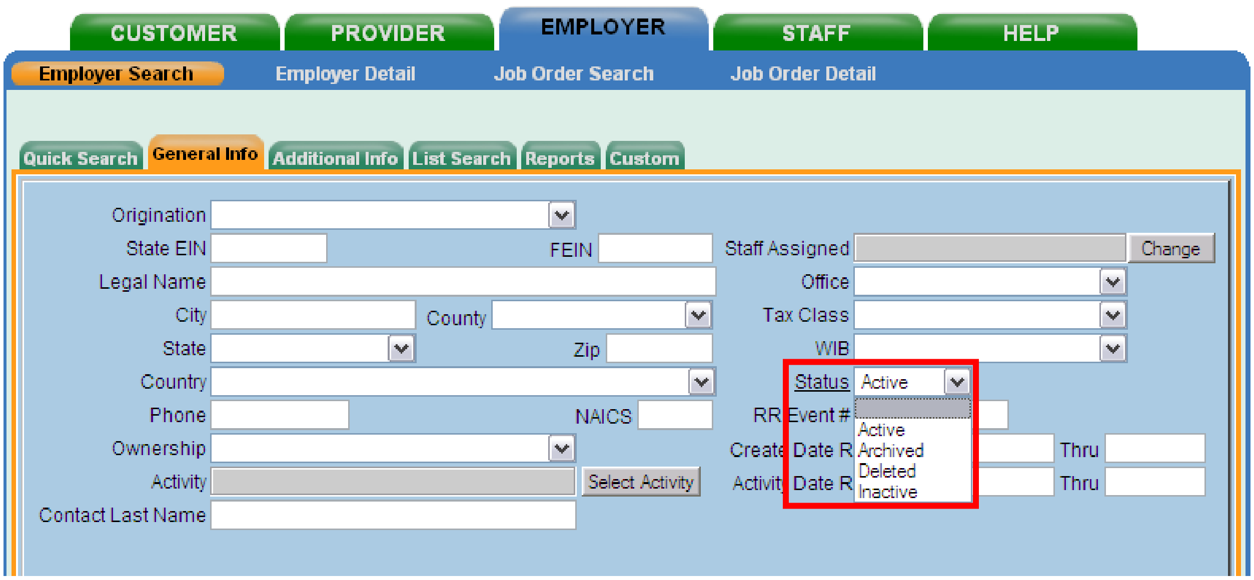
EMPLOYER MODULE DATA ENTRY

Business Services staff are responsible for entering the employer information into a new or existing employer record in OSOS and creating the job order for the OJT.

SEARCHING FOR AN EXISTING EMPLOYER RECORD

Before creating a new employer record in OSOS, you must *check if an employer record already exists for that employer. This prevents duplicate records from being created.*

To see if an employer already exists in OSOS, navigate to the **General Info** tab in the **Employer Search** window of the **Employer** module. The **Status** field automatically defaults to *Active* employers. To search for both active and inactive employer records, select the blank option in the **Status** field dropdown. This will allow you to search for the employer whether that employer is active or inactive.



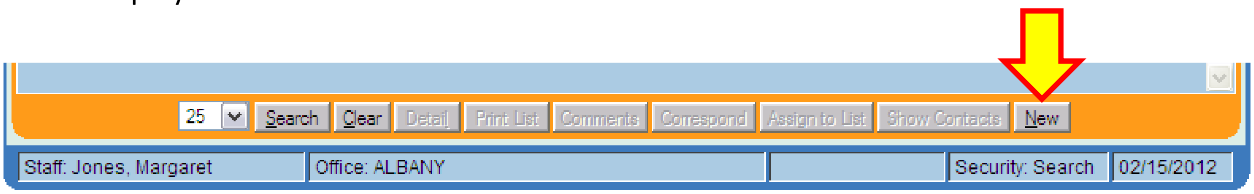
To search by name, return to the **Quick Search** tab of the **Employer Search** window. Enter the first few letters of the employer's name in the **Employer Name** field and click the **Search** button. Because the employer name may be entered different ways, you may need to enter variations of the 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*. It is very important to complete a thorough search to avoid duplicating the employer record in OSOS.

If multiple employers exist, click the check box next to the appropriate employer and then click the **Detail** button. If this is not the appropriate employer then click the **Return to Search** button and select another in the list. If your search criteria return a single match, then you will be directed to the **Employer Detail** window.

CREATING A NEW EMPLOYER RECORD

Before creating a new employer record in OSOS, you must *check if an employer record already exists for that employer.*

If the business is not found, click the **New** button and enter the employer information to create a new employer record.

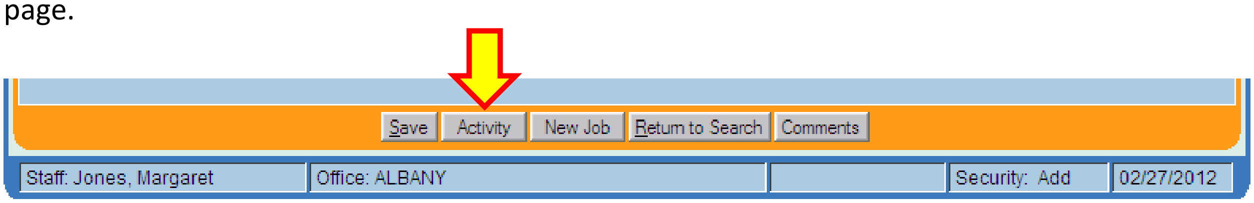


Once you have selected or created the appropriate employer record, make sure the employer information is complete, correct and current throughout the **General Info**, **Additional Info**, and the **Contact Info** tabs.

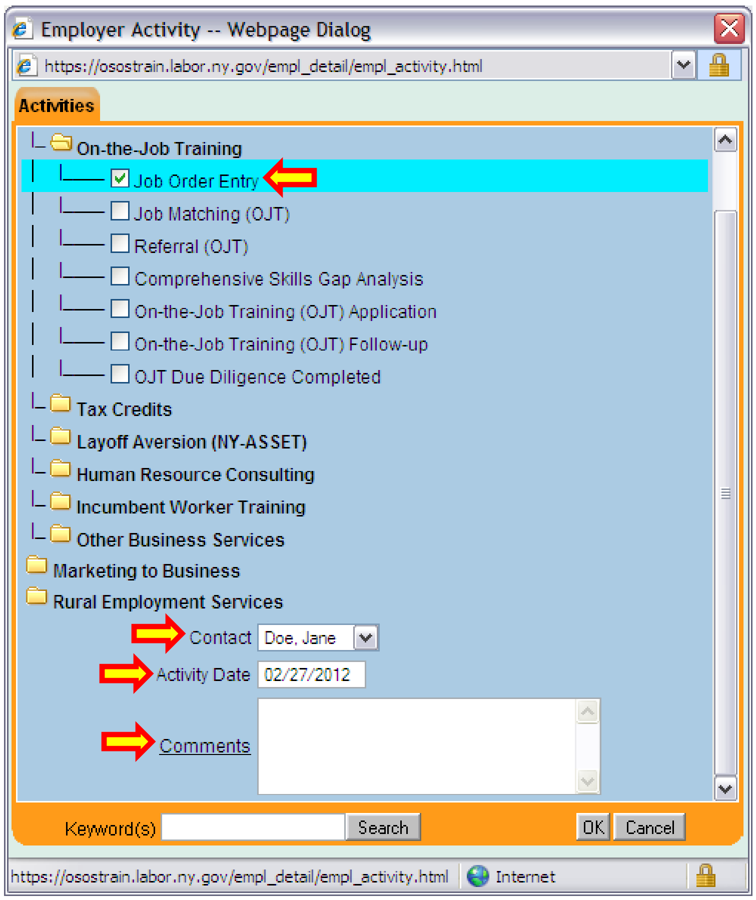
Once you have selected the appropriate employer; make sure the employer information is complete, correct and current throughout the General Info, Additional info, and the Contact Info tabs.

Entering an Employer Activity

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



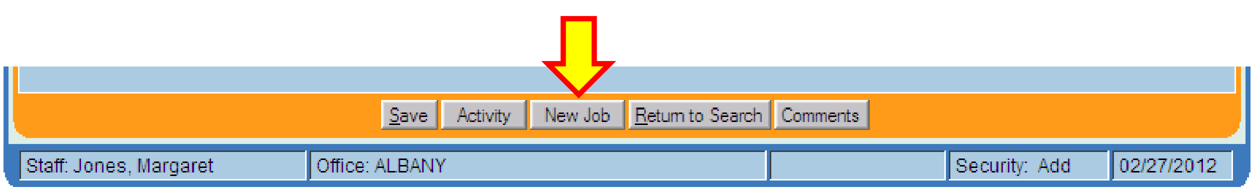
Data enter any activity provided to the employer. The business contact person's name and the current date will automatically populate the **Employer Activity - - Webpage Dialog** box. Select the appropriate activity. The **Contact** field has a drop down list to change the contact and you may add comments into the **Comments** box. Correct the **Activity Date**, if necessary.



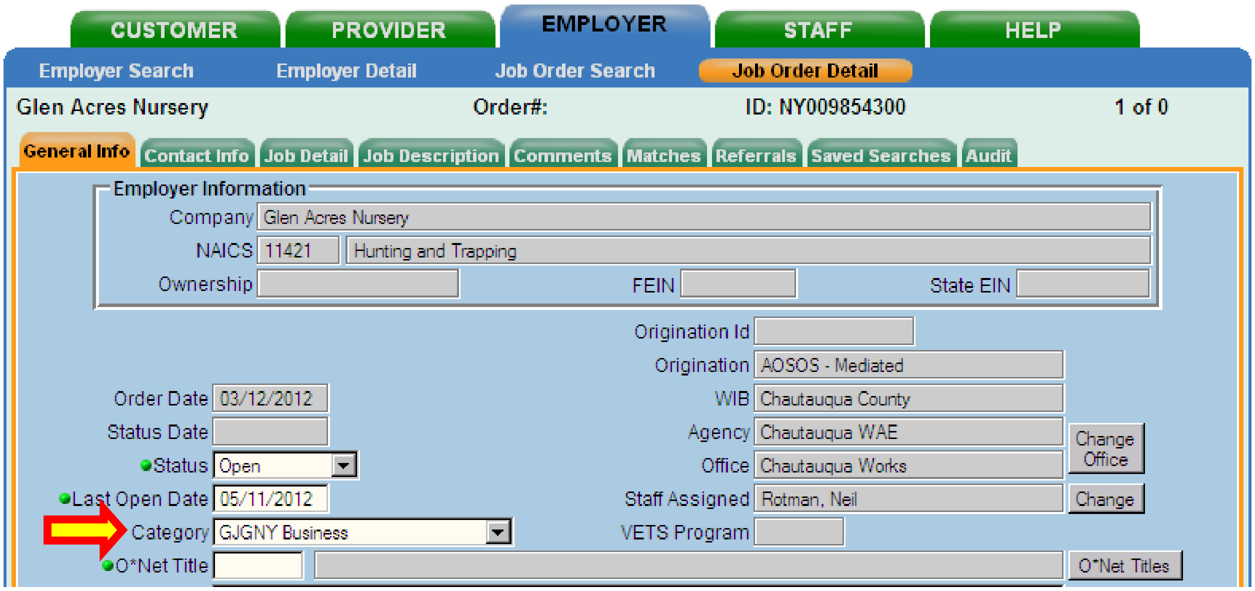
ENTERING A JOB ORDER

The assigned Business Services staff in the One-Stop Center must record the OJT as a job order in OSOS and a match for participants must be completed.

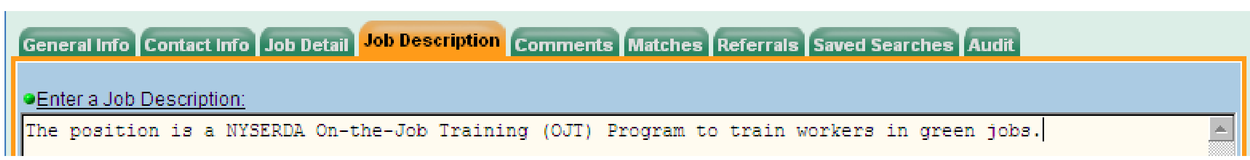
To enter a job order from the employer record, select the **New Job** button, located at the bottom of each tab in the **Employer Detail** window of the **Employer** module.



Complete the appropriate information about the job order as usual. Be sure to select *GJGNY Business* as the **Category**.



Begin the job description with the following statement: *The position is a NYSERDA On-the-Job Training (OJT) Program to train workers in green jobs.*



Complete the remaining data fields, as necessary, to create a complete job order.

PROVIDER MODULE DATA ENTRY

This information must be entered in sequential order: provider, service, and then the offering. The Business Services staff in the One-Stop Center will enter the business and job seeker information into OSOS. The Local Associate Employment Service Representative is authorized to data enter the provider and offering information when the information is not already in OSOS.

The OJT 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. The CRT provider is the name of the facility that provides the CRT.

The CRT provider does not need to be listed in the ETPL. If the training provider and offering are eligible for WIA funding, then both should be available in OSOS. If not, the Business Services Representative will need to enter the training provider and offering into OSOS.

Creating the Provider Record

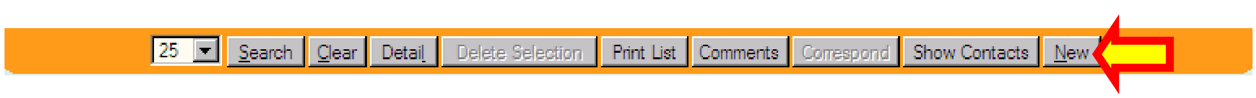
Navigate to the **General Info** tab found in the **Provider Search** window of the **Provider** module. A search may be customized in numerous ways such as selecting the WIB name from the drop down list. The search is similar to what was described in the previous Business Data Entry section. The search automatically defaults to searching for only active providers. Change the **Status** to the blank space. This will allow you to search for the provider whether that provider is active or inactive.

When searching by name, enter the first few letters of the provider in the **Provider Name** field and click the **Search** button. Because the provider 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*. Be thorough to avoid duplications.

As with the Business Data Entry search on page 4, if multiple provider records exist, then click the check box next to the appropriate record and click the **Detail** button. If this is not the appropriate provider then click the **Return to Search** button and select another in the list.

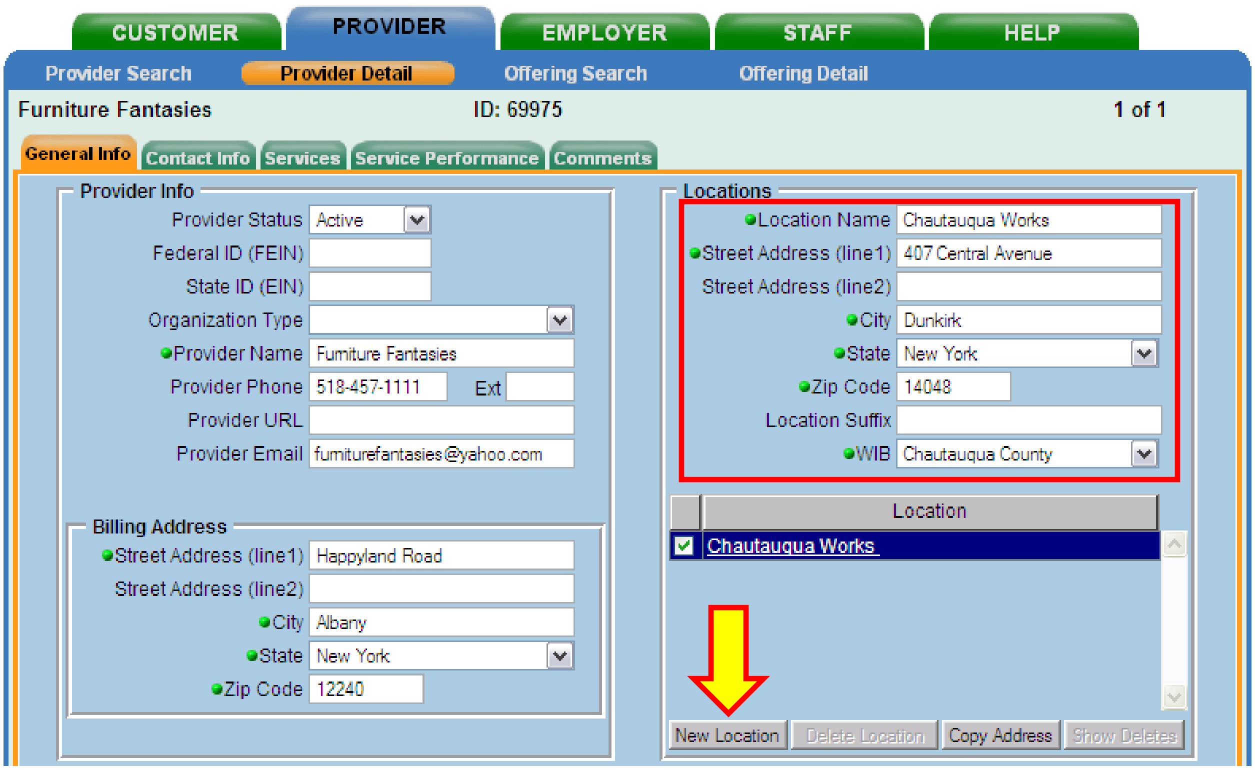
If your search criteria return a single match, then you will be directed to the **Provider Detail** window.

If the business or training facility is not listed in the **Provider** module, or the listed provider is not the one desired, then click the **New** button and enter the relevant information.

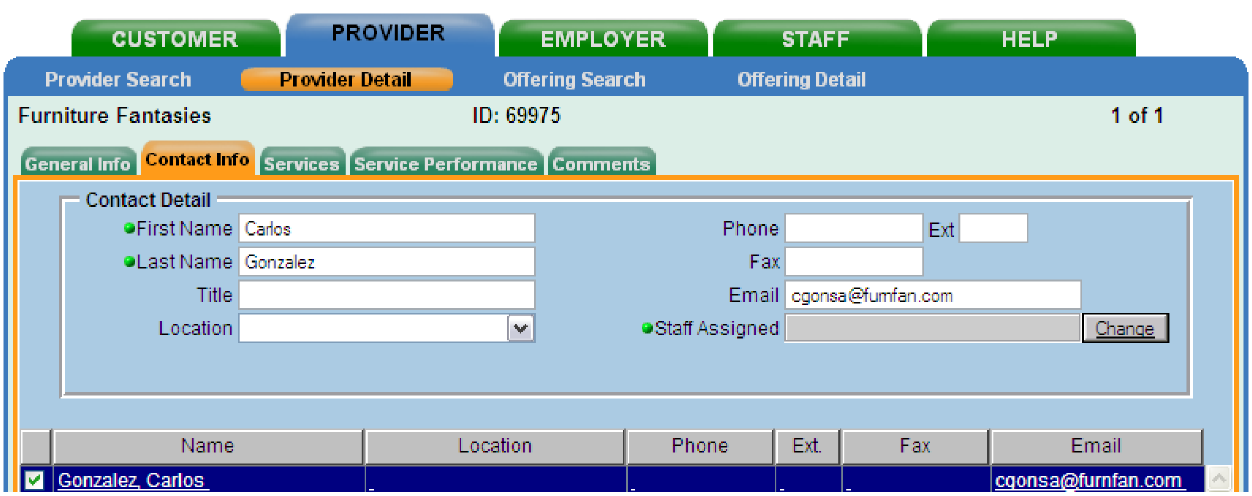


Complete and update all data fields in the **Provider Detail** window with the employer or training facility information.

For an existing OJT or CRT provider, the listed location(s) will usually include the actual sites where the provider does business. However, with this program, the WIB funding the OJT should be listed as the location. If the WIB is not listed, then click on the **New Location** button and complete the data fields in the **Locations** box with the WIB information.

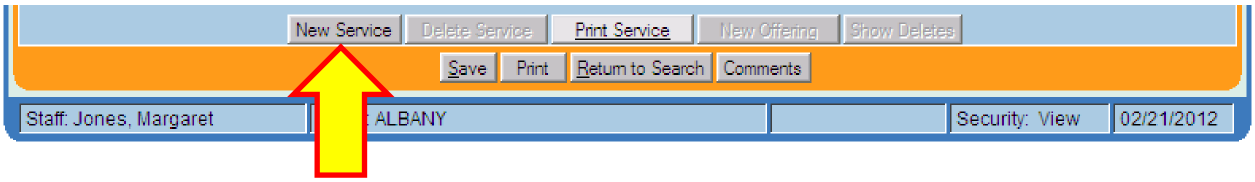


Add contact information on the **Contact Info** tab.

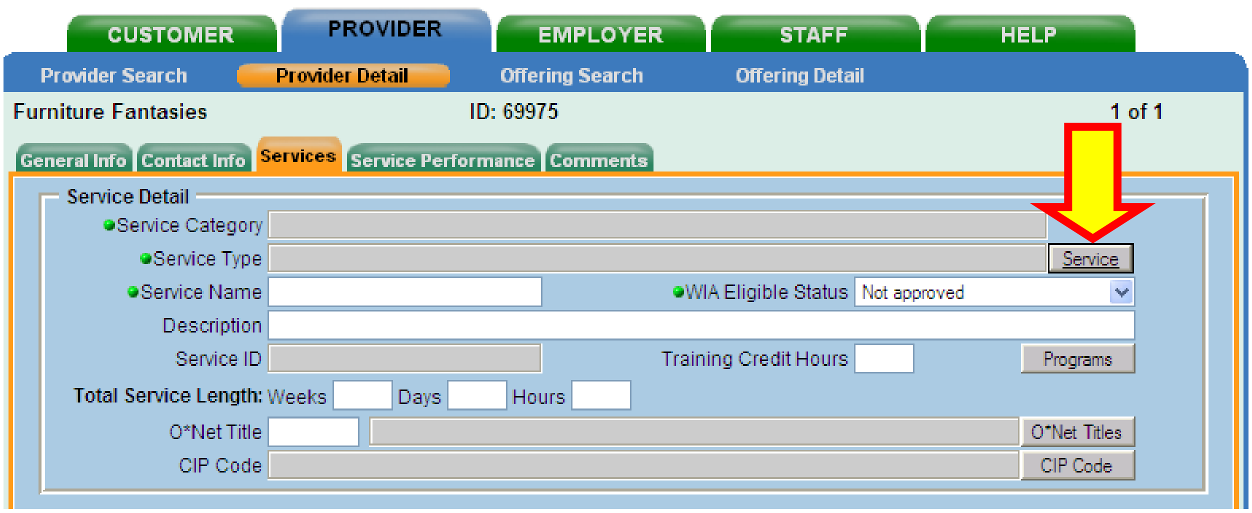


PROVIDER SERVICES

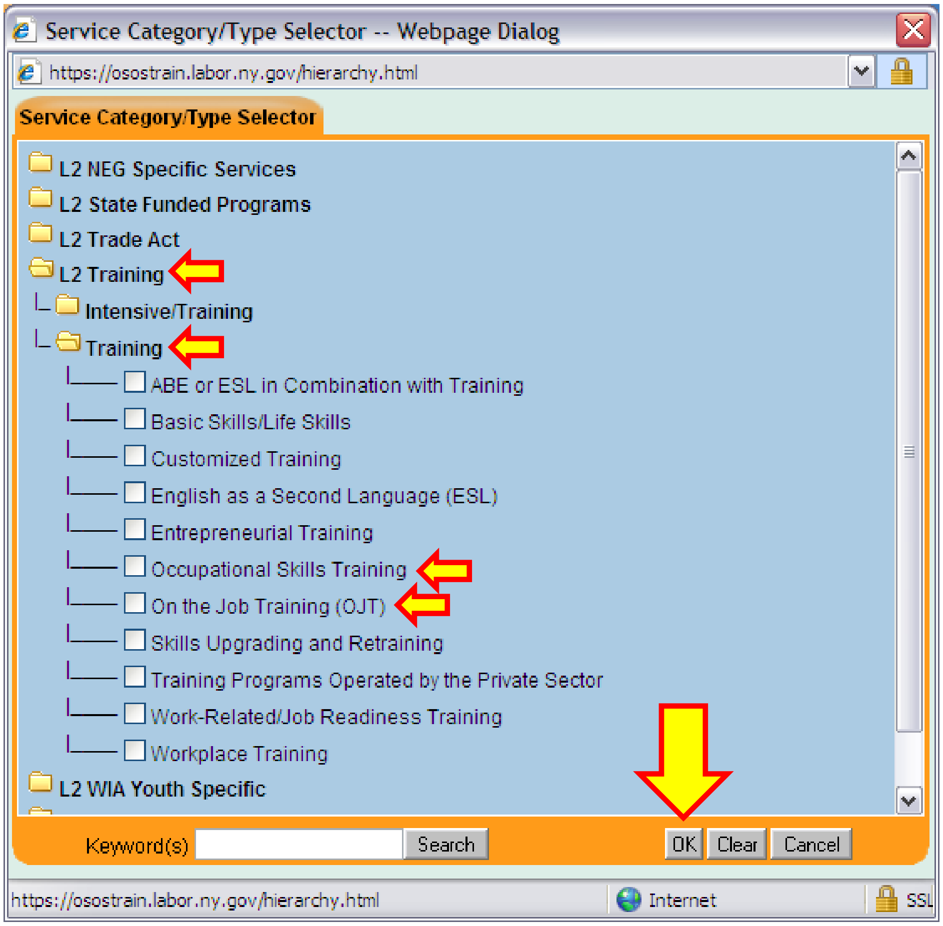
Before creating the service offering that will be linked with customer records, the provider service must be created. To create the service, navigate to the **Services** tab within the **Provider Detail** window. Click the **New Service** button.



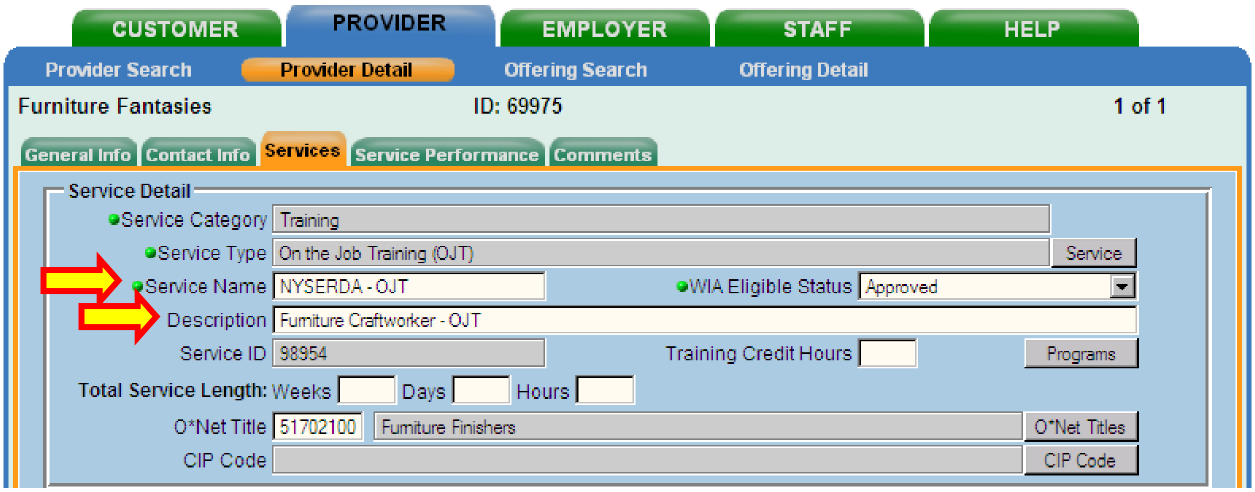
Click the **Service** button.



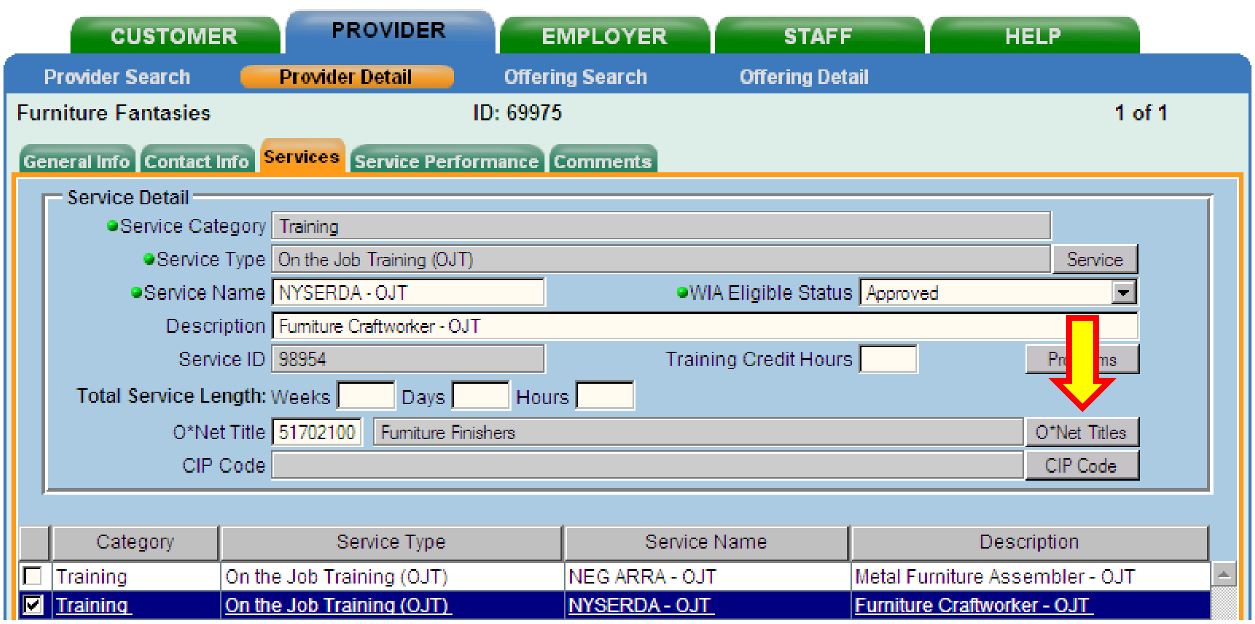
Select **L2 Training**, **Training**, and then **Occupational Skills Training** for CRT or **On the Job Training (OJT)** as appropriate. Click **OK**.



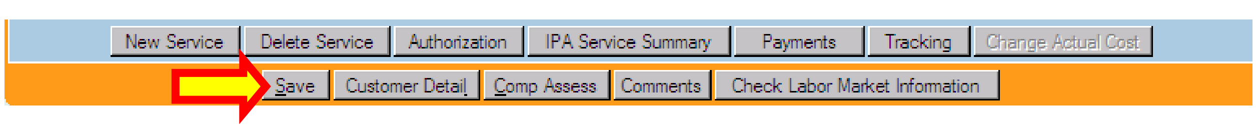
NYSERDA – OJT or *NYSERDA – CRT* should be entered in the **Service Name** field, as appropriate. In the **Description** field, enter the occupational title followed by the letters *OJT* or *CRT*. For example: *Electrician Helper – OJT*.



Click the **O*Net Titles** button and search using a keyword or scrolling through folders. Then select the appropriate O*Net title.



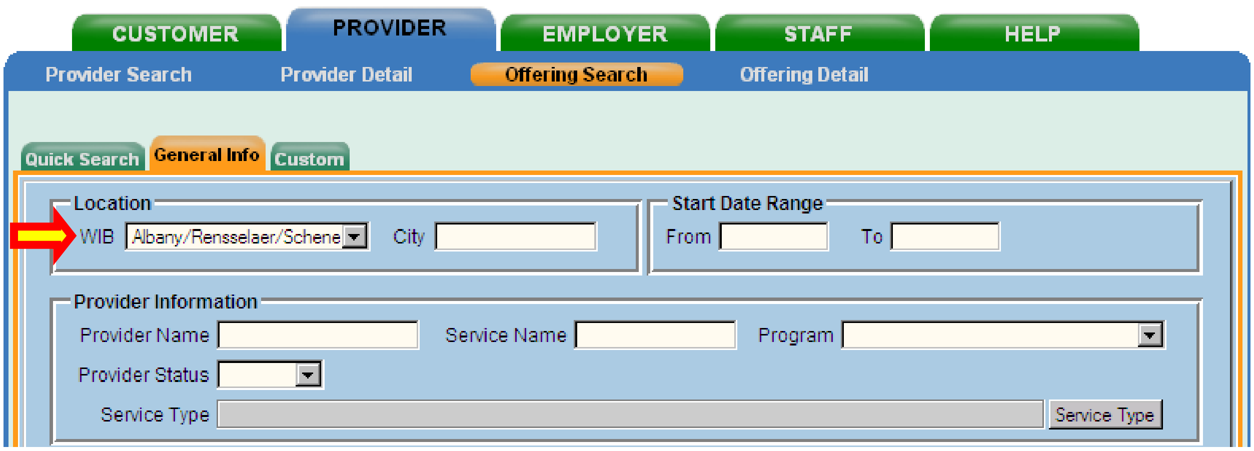
Click the **Save** button to save the record.



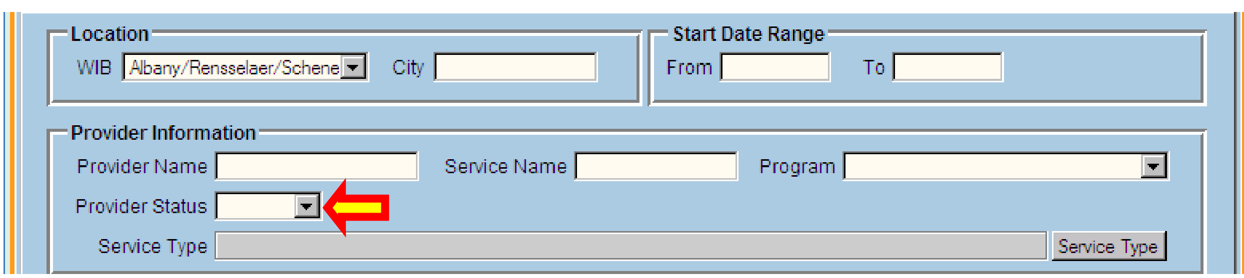
OFFERING

If you did not need to enter a new service in the **Provider Detail** window, then the offering may already exist. However, if you created a new provider service, you will not find any service offerings associated with this provider service and can create a new service offering without first searching for it.

To see if an offering already exists in OSOS, navigate to the **General Info** tab of the **Offering Search** window in the **Provider** module. By default, the WIB of the office under which you have logged in will automatically be selected in the **Offering Search**. Change this if necessary.

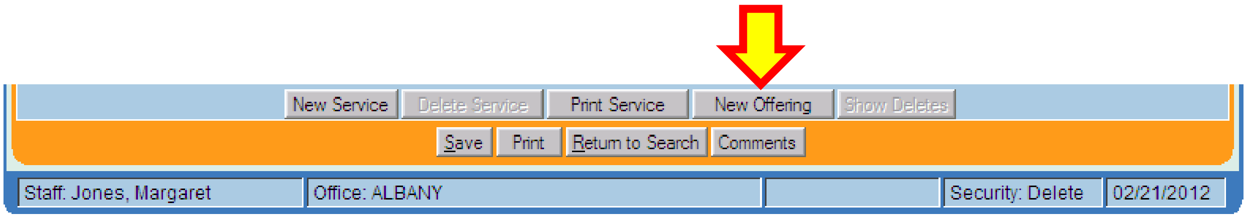


As with the business and provider searches, the **Provider Status** field automatically defaults to *Active*, thereby excluding inactive offerings. Change this field to the blank space. This will allow you to search for the offering whether that offering is active or inactive.

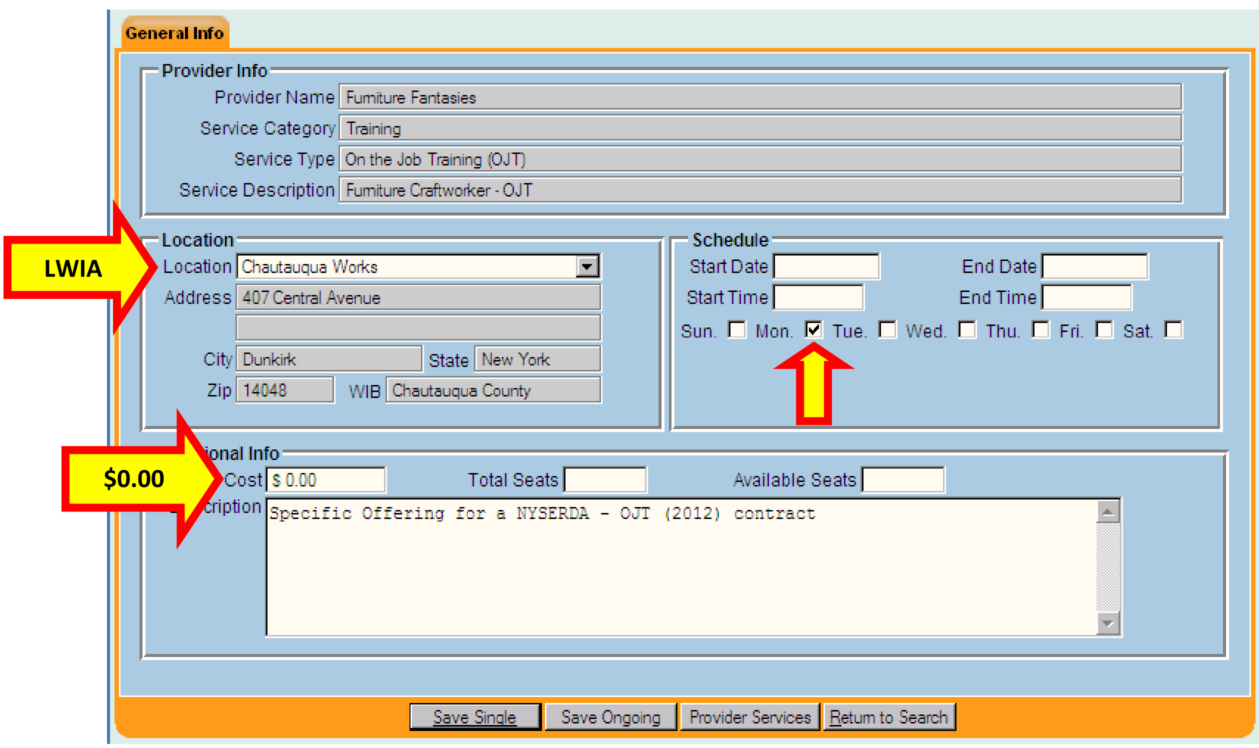


Search for an offering using a combination of the following search criteria fields: **Provider Name**, **Service Name**, and **Service Type**. Use the provider name of the provider record you just found or created. Recall that the service type is **On-the-Job Training (OJT)** or **Occupational Skills Training** and the service name is *NYSERDA - OJT* or *NYSERDA – CRT*.

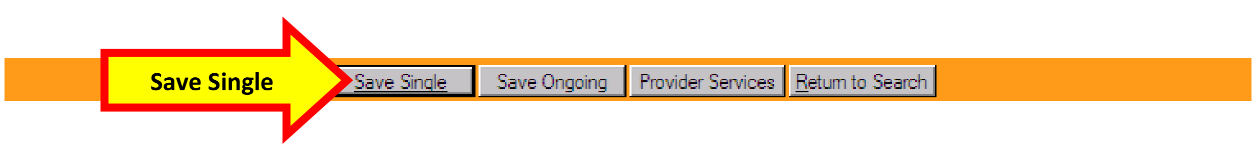
If the offering does not exist, return to the **Services** tab of the **Provider Detail** window. Select the service you would like to use and click the **New Offering** button.



This brings you to a blank **Offering Detail** window. In the **Location** box, select the WIB in the **Location** field dropdown box. Check only the box for Monday in the **Schedule** box. In the **Additional Info** box, the **Cost** is *$0.00*. The **Description** should state *Specific Offering for a NYSERDA - OJT (2012) contract* or *Specific Offering for a NYSERDA - CRT (2012) contract.*



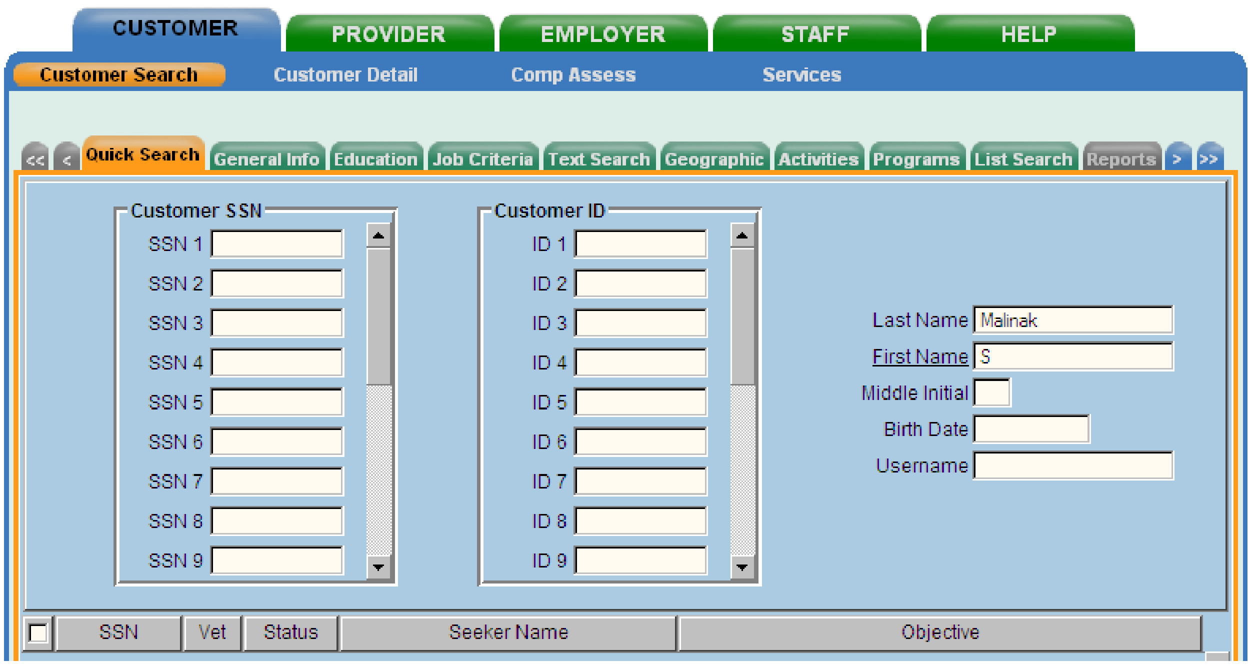
Click **Save Single**.



PARTICIPANT DATA ENTRY

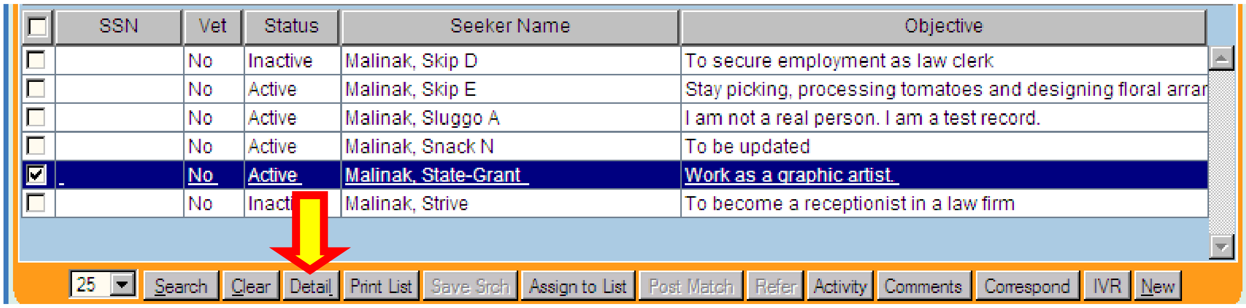
All employer and provider data entry must be complete before a customer record can be linked to a particular OJT or CRT opportunity. To enter participant data, begin in the **Customer Detail** window of the participant's customer record. For additional guidance on entering customer data, refer to the OSOS data entry guides available online.

Search for the customer using either the social security number or the customer's name. If you know the OSOS **Customer ID** number, you may access the record with that. If you are unsure how to spell the name, you may also search by typing the first few letters of the **Last Name** and/or **First Name** in the respective data fields.

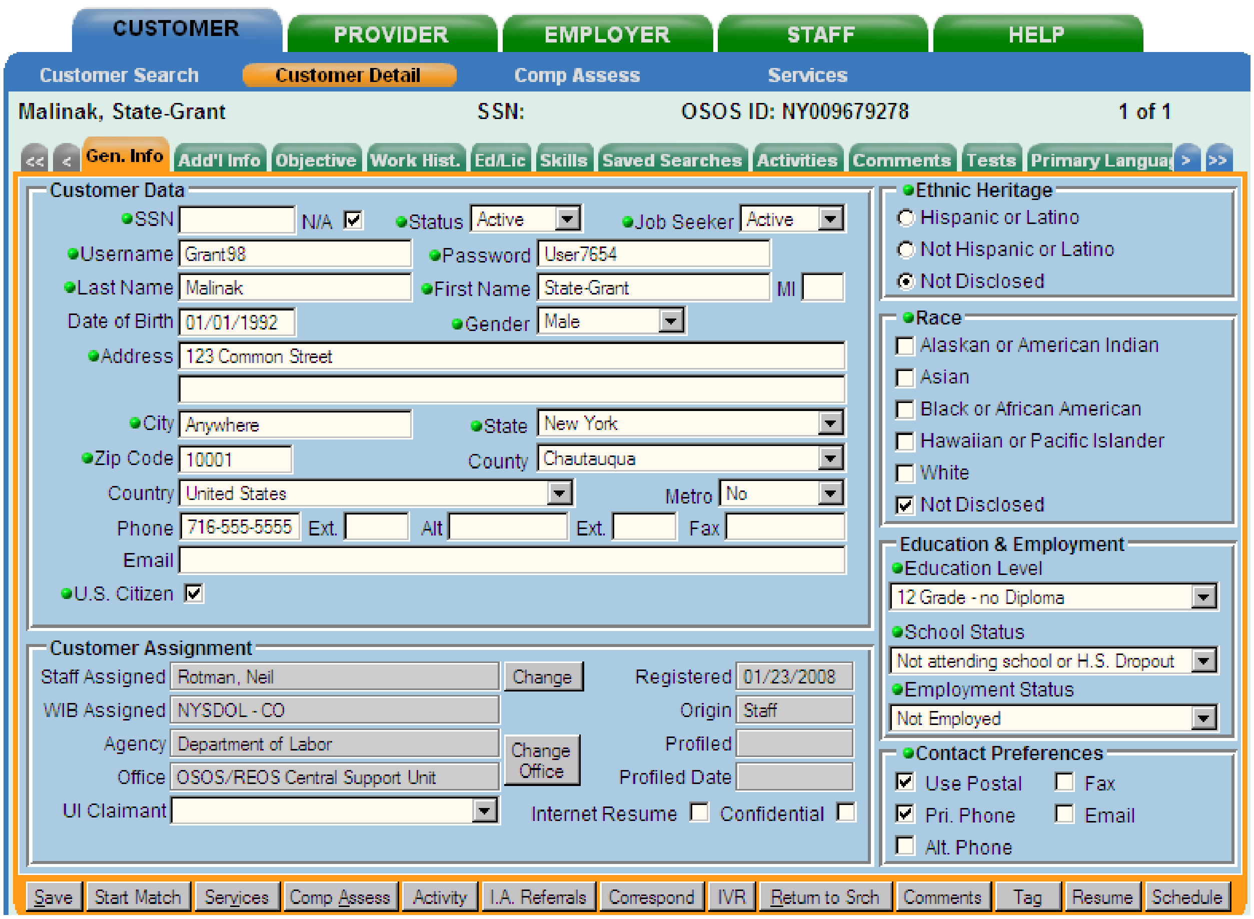


You may adjust the potential number of records to be returned as search results to 25, 50 or 100. Click **Search**.

The search may result in multiple matches. Select the customer record that you want and click **Detail**.

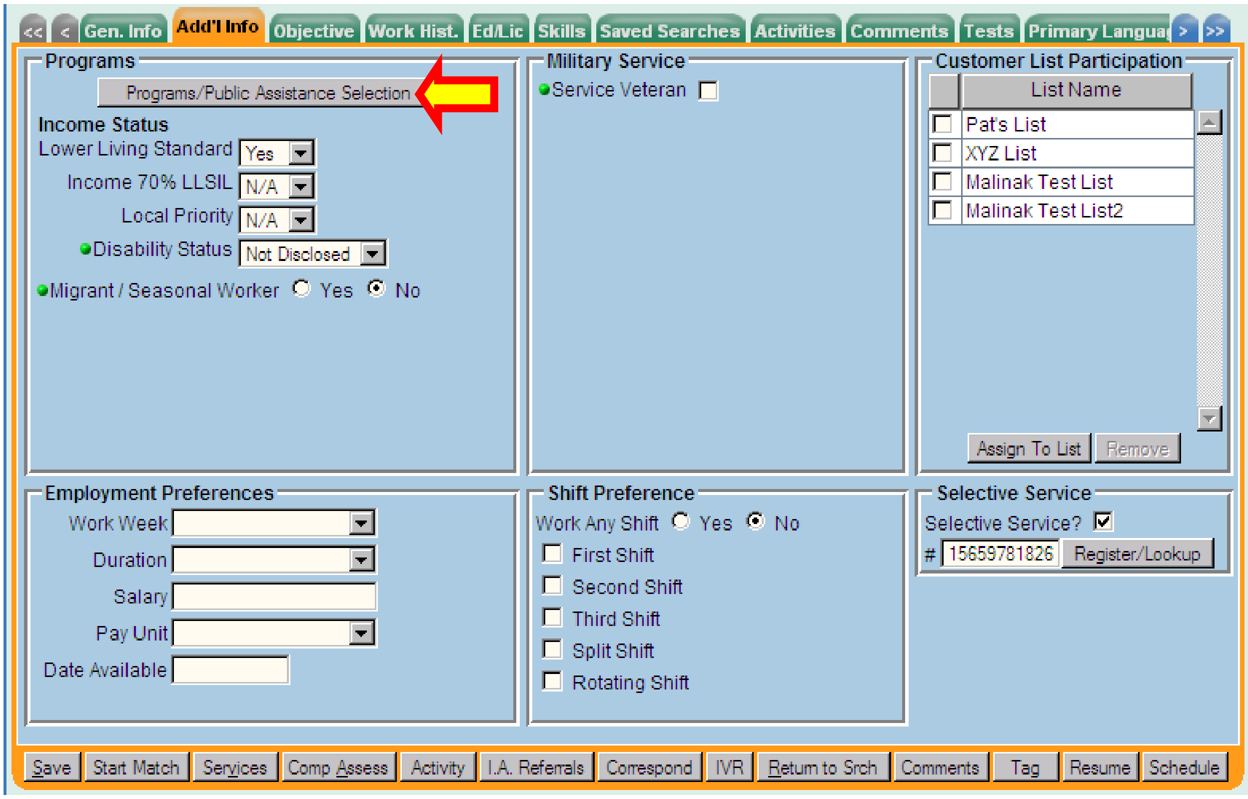


You will be directed to the **Gen. Info** tab in the **Customer** module.

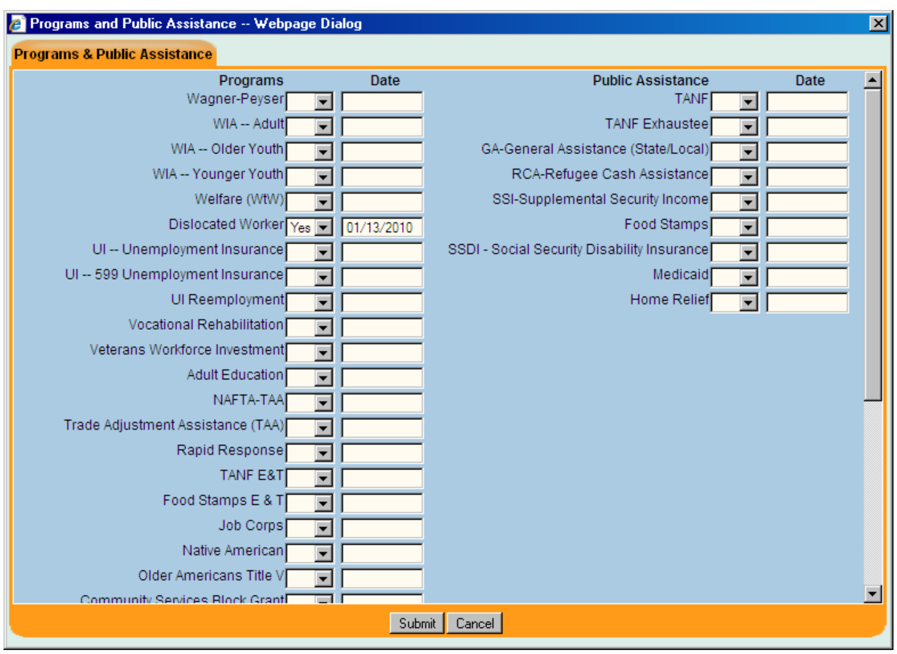


*Be sure to review and update all appropriate information throughout the **Customer Detail** window.*

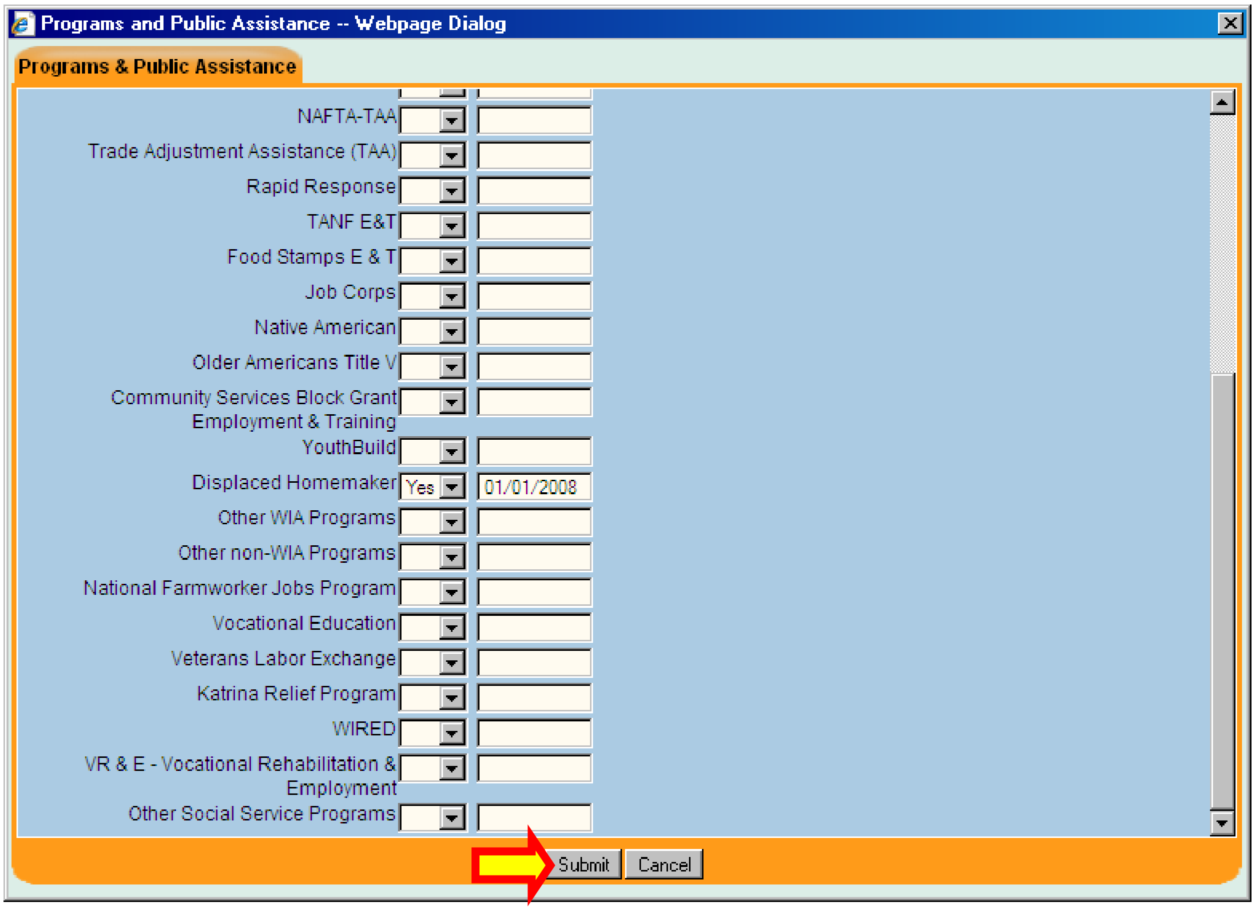
Review the information in the **Add'l Info** tab. Click the **Programs/Public Assistance Selection** button.



The **Programs and Public Assistance - - Webpage Dialog** will pop up.



Scroll down to view all the items. Select any items that apply to the customer and enter the date that the customer became eligible for the program. If the date is unknown, use the current date. Click **Submit**.



Because all customers participating in this program are WIA customers receiving Intensive service and training, their records require Data Element Validation (DEV) activity per TA 11-12 and require additional data entry per TA 10-03. These requirements include, but are not limited to, verifying and entering the following information: **Date of Birth** on the **Gen. Info** and **DEV** tabs; **Selective Service** on the **Add'l Info** tab, as applicable; and low income status.

In addition, 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 TA 08-4.1 and TA 09-17. Supporting comments must be entered into the customer record.

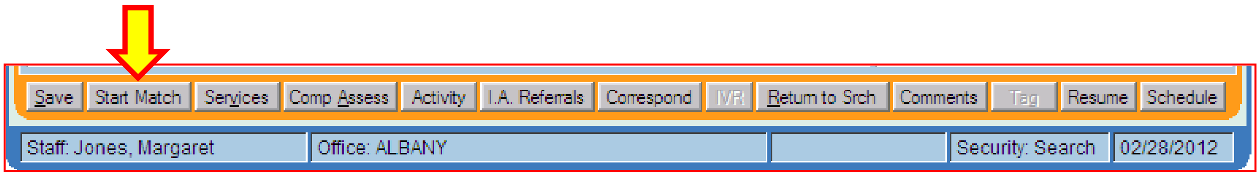
IDENTIFYING SKILLS USING JOB ZONE

Potential trainees should use JobZone to develop a list of their occupational skills. JobZone is viewed best using Google Chrome.

Be sure to complete the **Additional Skills** field in the **Skills** tab under the **Customer Detail** window. Refer to the *Job Matching Skills Worksheet* for ideas. This text field is used during the job matching process. It is also used as part of the skills gap analysis to determine what skills the trainee possesses and what skills need to be attained in OJT or CRT.

Matching the Customer to the Job Order

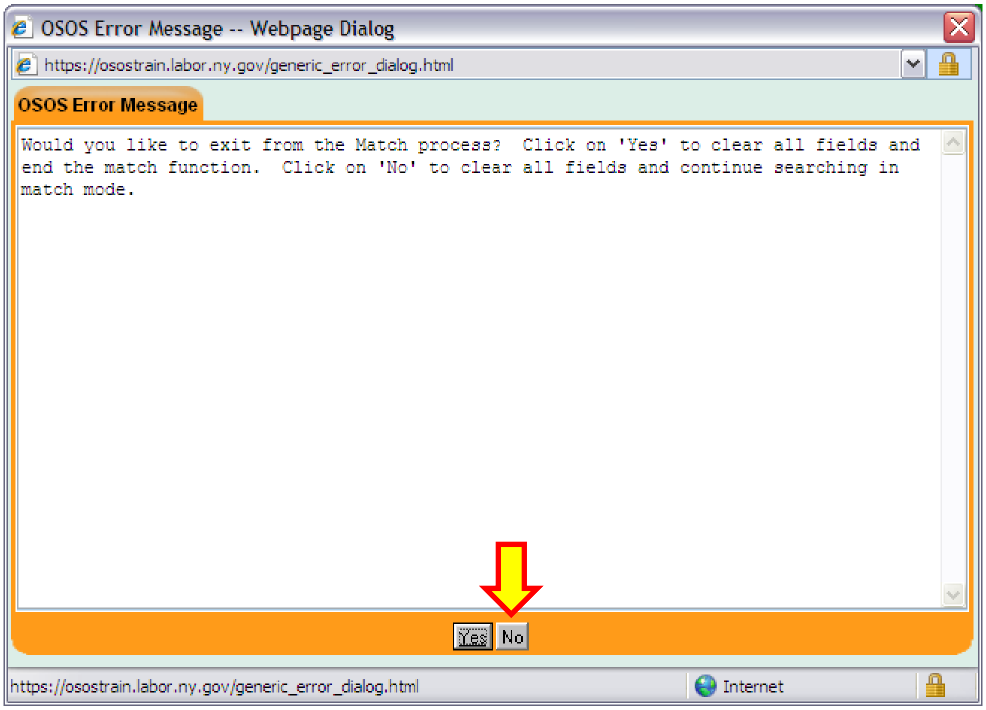
The customer may now be matched with existing job orders. From the customer record, click the **Start Match** button.



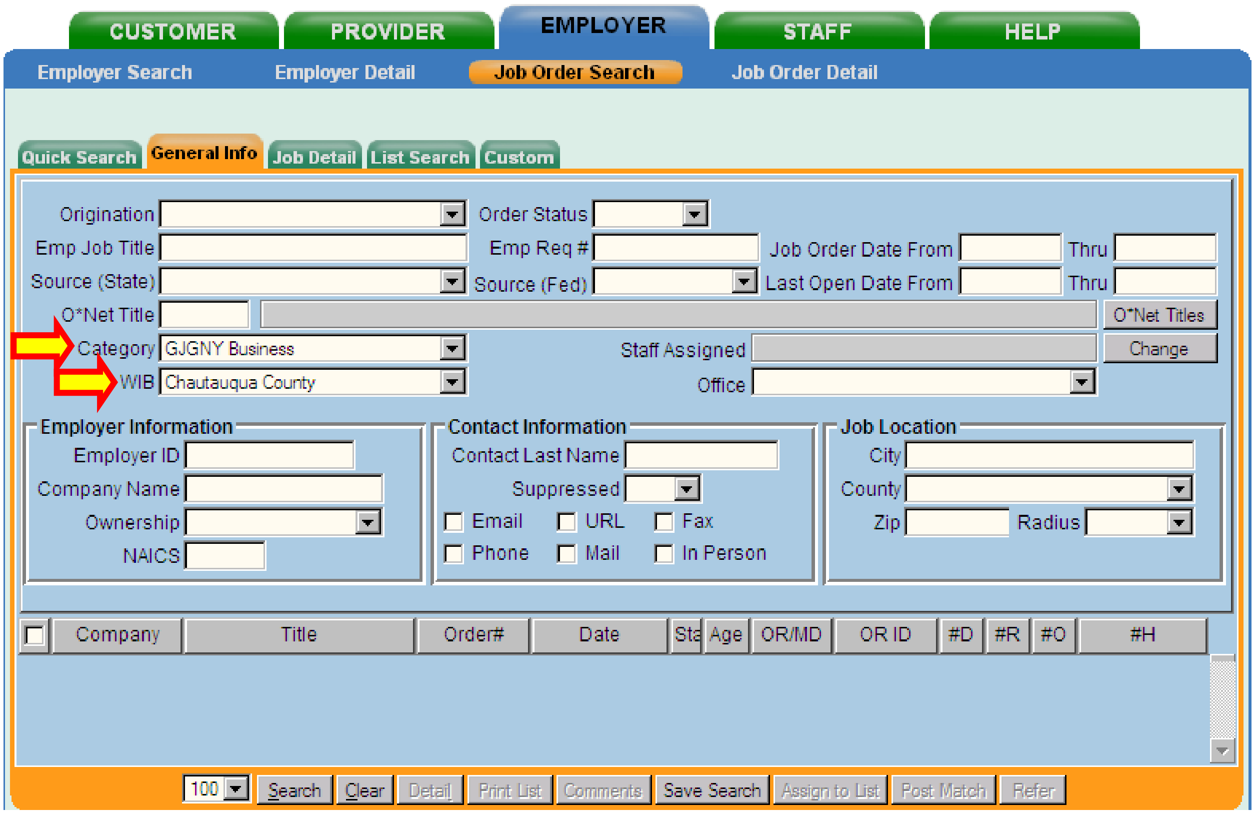
You are brought to the **Job Order Search** window of the **Employer** module.

Click the **Clear** button to clear out the job preferences on the customer record so that you can more easily find the specific OJT opportunity.

When prompted, click **No** to clear all fields and continue matching.



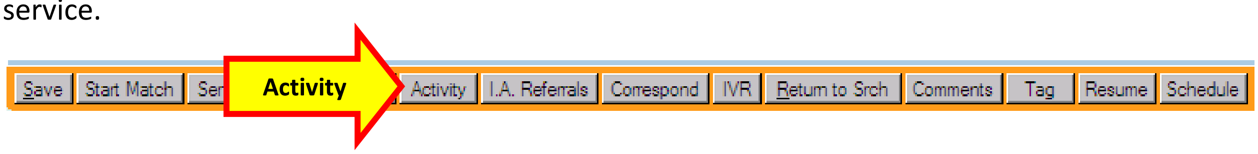
Go to the **General Info** tab in the **Job Order Search** window. Select *GJGNY Business* for the **Category** and the appropriate **WIB**. Then click **Search**.



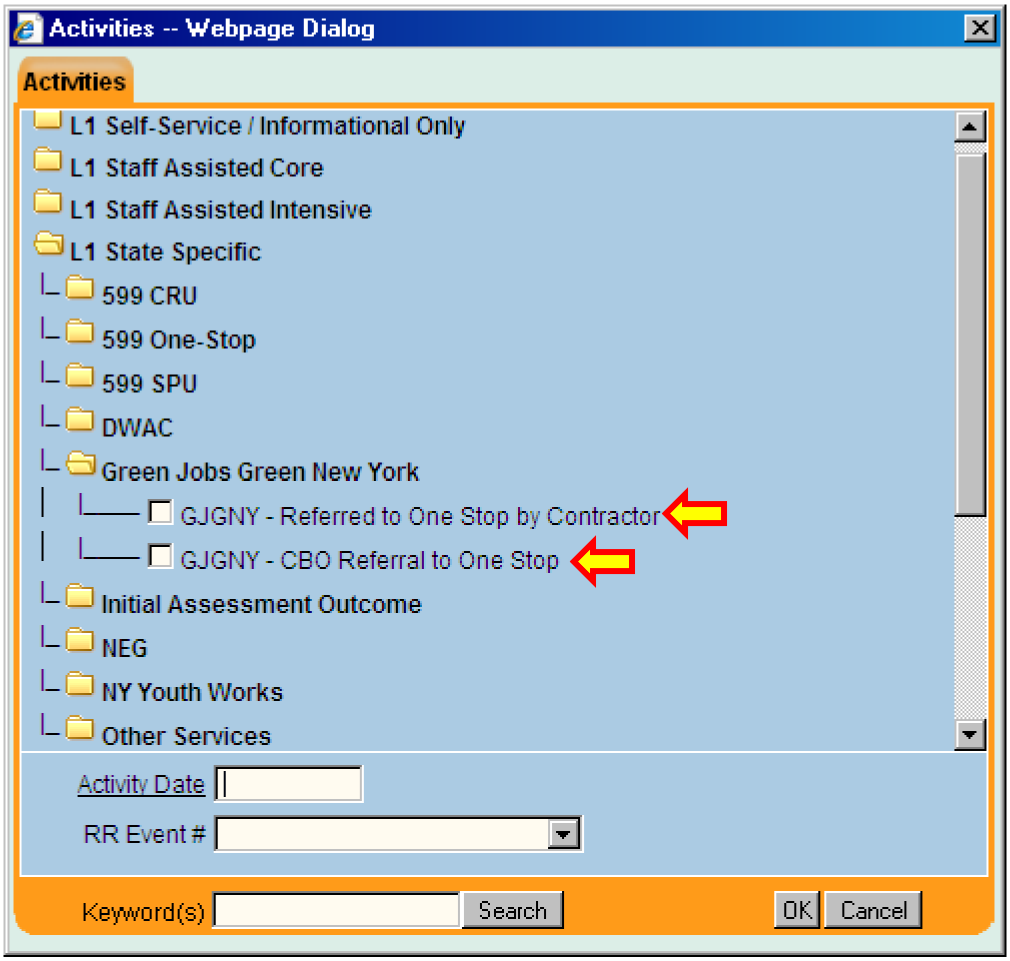
Any GJGNY job order will be identified in the list of search results or you will receive the message: *No Matches Found* in the upper right hand corner of the screen.

Participant Activities

Community Based Organizations (CBOs) have signed contracts to perform outreach and refer all potential trainees to the local One-Stop Center. Contractors have agreed to refer all potential trainees to the One-Stop Center prior to participation in the NYSERDA program. The assigned Business Services staff in the One-Stop Center are to record these referrals in OSOS as a State Specific Activity (L1 service). Once the data in the tabs under the **Customer Detail** window has been verified, click the **Activity** button at the bottom of any tab to begin entering the L1 service.

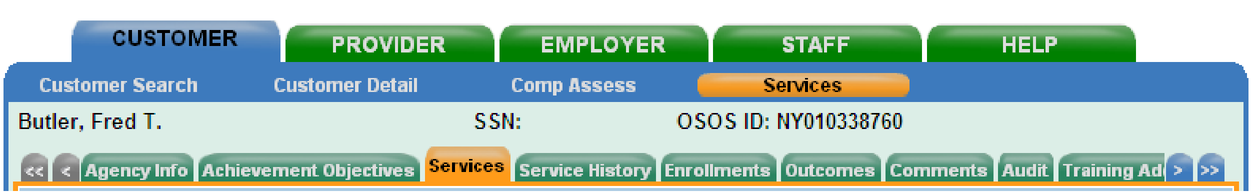


This will bring up the **Activities - - Webpage Dialog** screen. The two NYSERDA GJGNY activities are located in the **Green Jobs Green New York** folder under the **L1 State Specific** folder. Select the appropriate activity indicating whether the contractor or CBO referred the potential trainee to the One-Stop Center. L1 State Specific Activities do not create or extend enrollments.

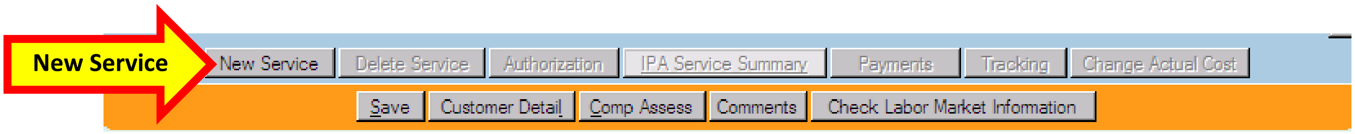


When the OJT or CRT is confirmed to have started, the assigned Business Services staff in the One-Stop Center must record the service in the customer record as an L2 service.

Once the data in the **Customer Detail** window has been verified, move to the **Services** window, **Services** tab to begin entering the L2 service.

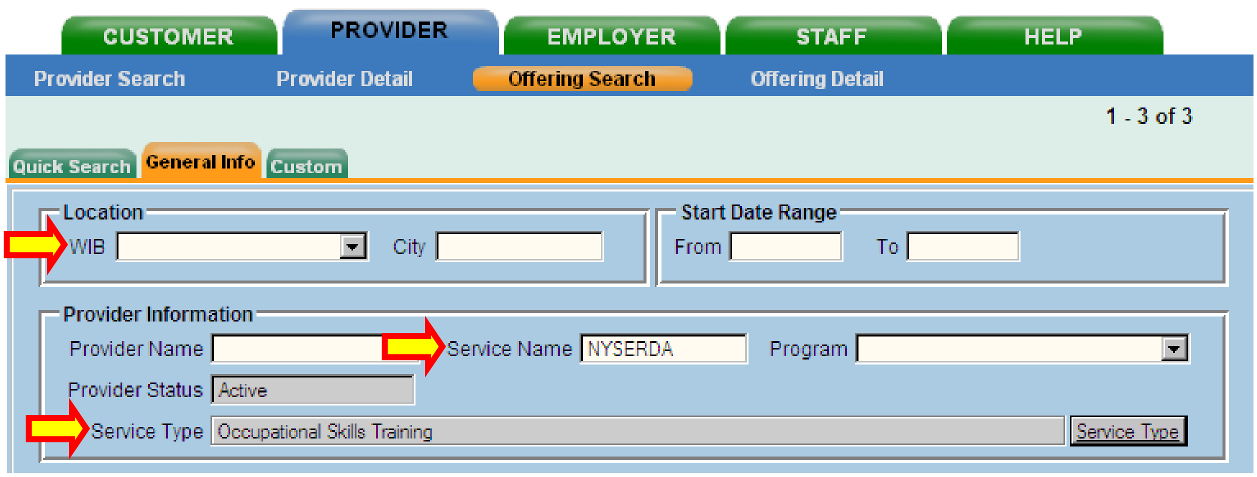


Click the **New Service** button.

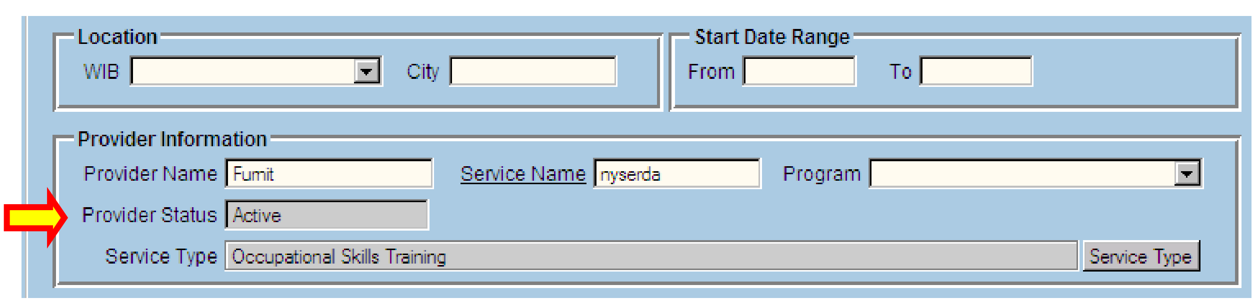


You will be transferred to the **Quick Search** tab in the **Offering Search** window of the **Provider** module. Navigate to the **General Info** tab. Be aware that, by default, the WIB of the office under which you are entering data will automatically be selected in the **WIB** field of the **Location** box. Change this if necessary.

Search using the **Provider Name**, **Service Name** and/or **Service Type**. The service type is **On-the-Job Training (OJT)** or **Occupational Skills Training** and the service name is *NYSERDA – OJT* for OJT and *NYSERDA – CRT* for CRT. You may enter *NYSERDA* to search for all related OJT and CRT offerings.

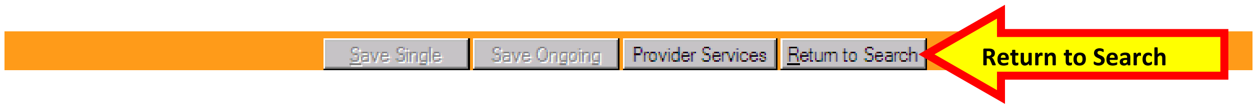


The **Provider Name** is the name of the employer for any NYSERDA OJT. If you are not sure how the employer name is entered into OSOS, you may search using the first few letters of the name. Because the employer name may be entered different ways, you may need to enter variations of the name. This will 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*.

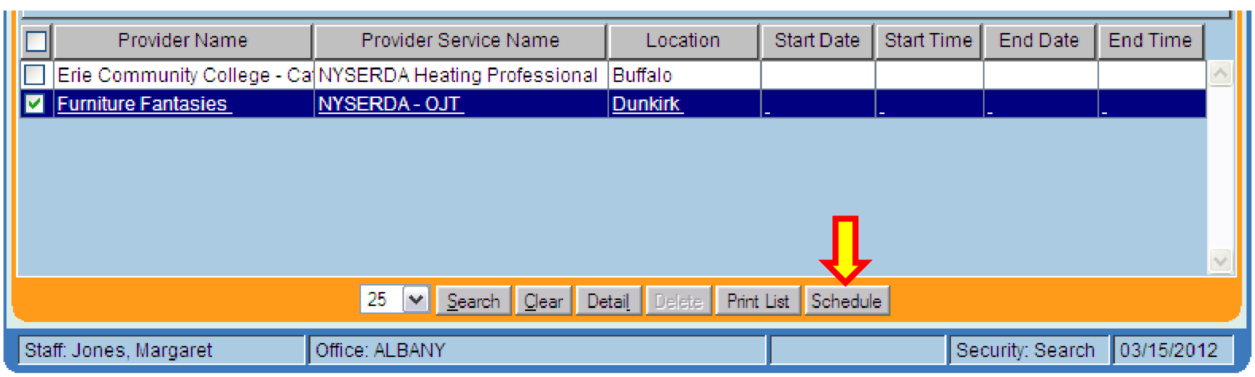


Click the **Search** button at the bottom of the screen.

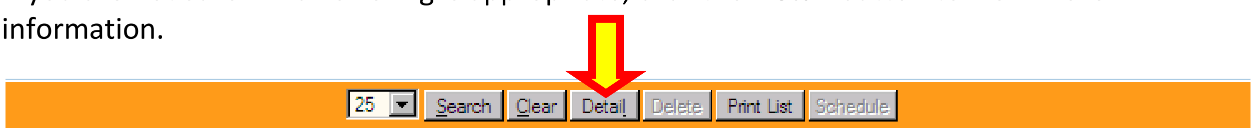
If only one offering matches your search, you will be directed to the **General Info** tab in the **Offering Detail** window. If this is not the offering that you wanted, click the **Return to Search** button to return to the **Offering Search** window and change your search. Once you have determined that you have the appropriate offering, click the **Return to Search** button.



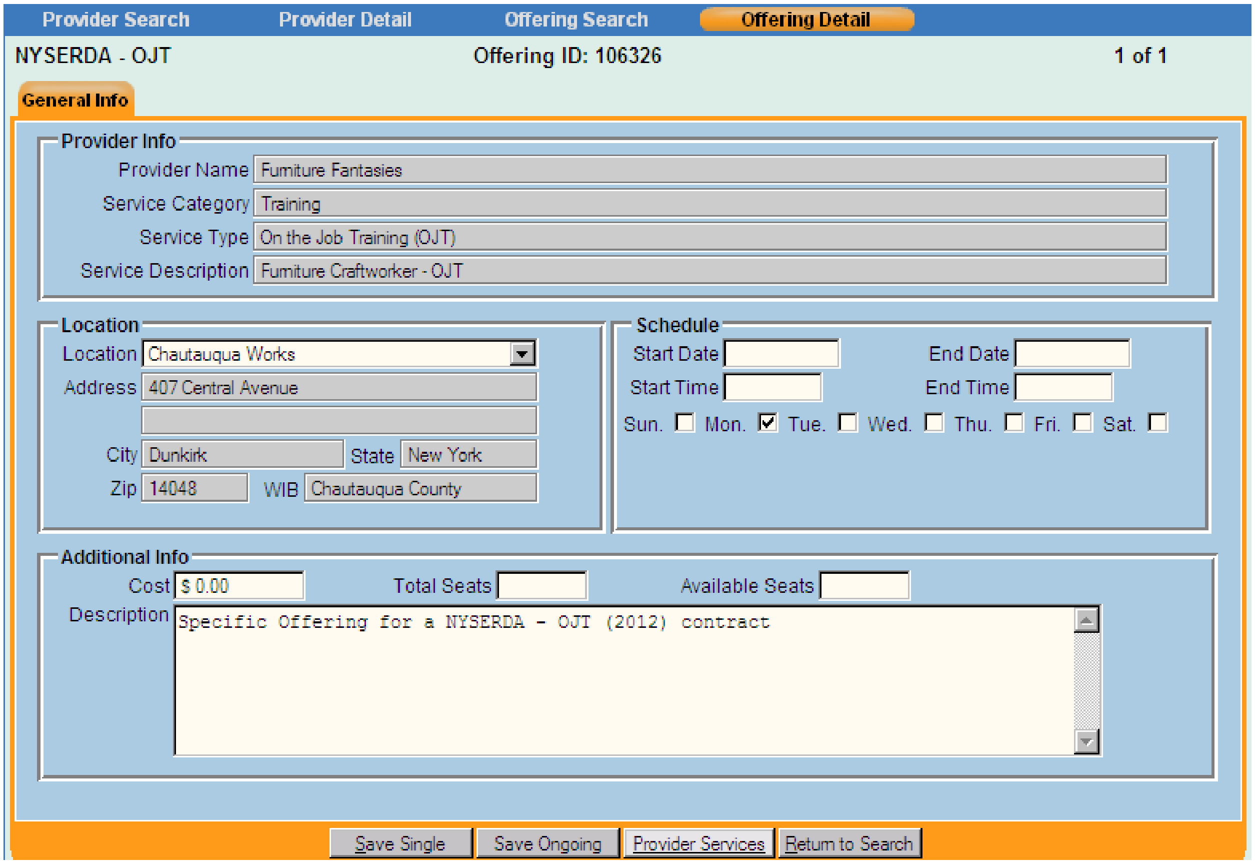
With the appropriate offering selected, click the **Schedule** button.



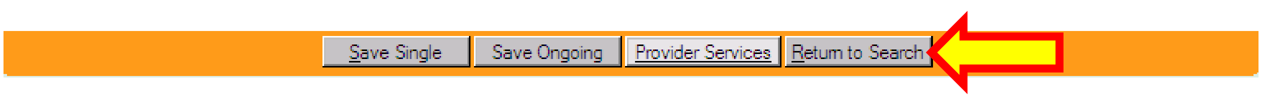
If you are not sure which offering is appropriate, click the **Detail** button to view more information.



You will be directed to the **General Info** tab in the **Offering Detail** window.

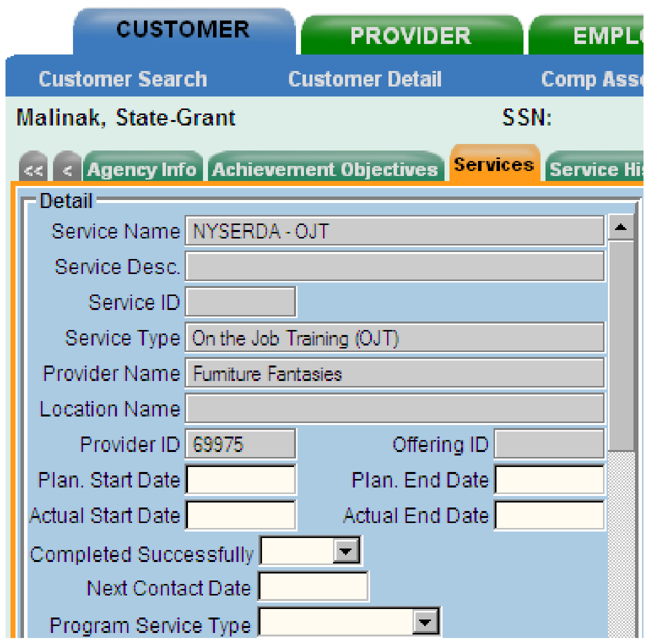


Click the **Return to Search** button to go back to the **Offering Search** window. You may now choose to schedule this offering or select a different offering from the matches.



You will be returned to the **Services** tab of the **Services** window in the **Customer** module. Complete the following data fields in the **Detail** section:

- **Plan. Start Date**: Enter the date the customer is projected to begin training in the format of mm/dd/yyyy.
- **Plan. End Date**: Enter the date the customer is projected to finish training in the format of mm/dd/yyyy.
- **Actual Start Date**: Enter the date the customer actually starts training in the format of mm/dd/yyyy.
- **Program Service Type**: Select *Non-ITA Training* for OJT and CRT.

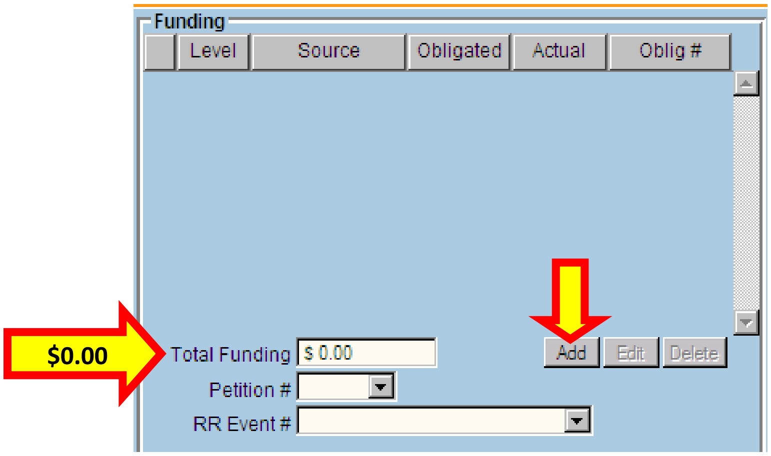


- Scroll down to locate and click the **NAICS** button and select appropriate NAICS code. The North American Industry Classification System (NAICS) groups establishments into industries based on the activity in which they are primarily engaged.

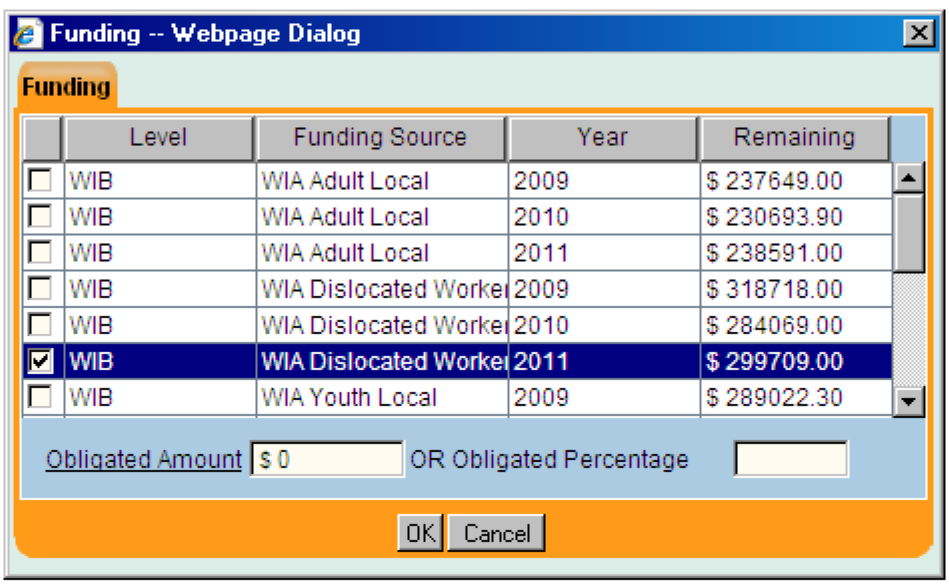
Click the **Save** button.

FUNDING THE SERVICE

Enter *0* in the **Total Funding** field because NYSERDA, not WIA, is funding the training. Click the **Add** button.



The **Funding - - Webpage dialog** box appears. Select the appropriate *WIB* level funds for the customer with the appropriate program year. Enter *0* in the **Obligated Amount** field and click the **OK** button. This will create or extend a WIA & Common Measures enrollment.

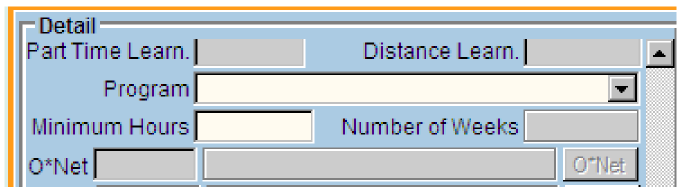


COMPLETING THE SERVICES DATA ENTRY

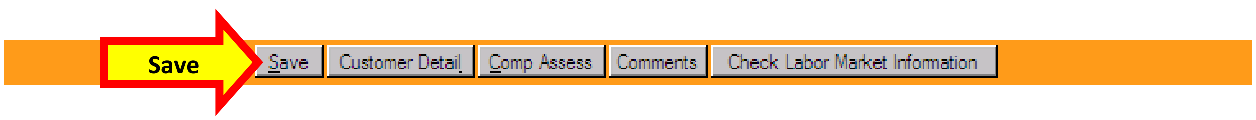
Once the funding has been added, turn your attention back to the **Detail** box. The **Part Time Learn.**, **Distance Learn.**, and **O*Net** fields have become active now that the funding has been entered. Complete these fields as appropriate. You may need to scroll down to view these data fields.

- **Part Time Learn.**: Select *Yes* or *No* to indicate whether or not the training is part time (less than 12 credit hours for CRT and less than 35 hours for OJT).

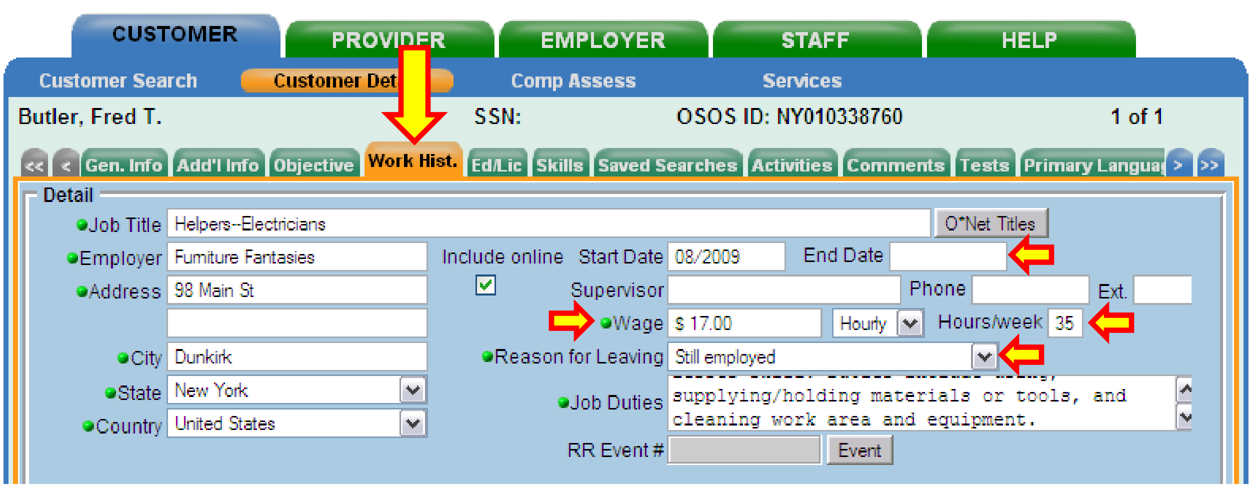
- **Distance Learn.**: Select *Yes* or *No* to indicate whether or not the training is taking place remotely through electronic technology.
- You will need to scroll down to access the remaining data fields in the **Detail** section.
- Click the **O*Net** button and select the job title that matches the customer's occupational goal related to the OJT.
  - The Occupational Information Network (O*Net) is a database which defines the key features of an occupation as a standardized, measurable set of variables called *descriptors*.
  - When the appropriateness of which O*Net title to select is in doubt, click the **Details** tab on the O*Net Webpage Dialog screen to review the description for each title under consideration. It is best to discuss the descriptions with the customer to determine the most appropriate title.



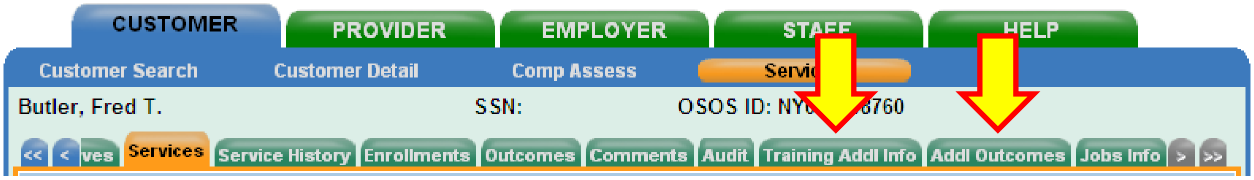
Click the **Save** button at the bottom.



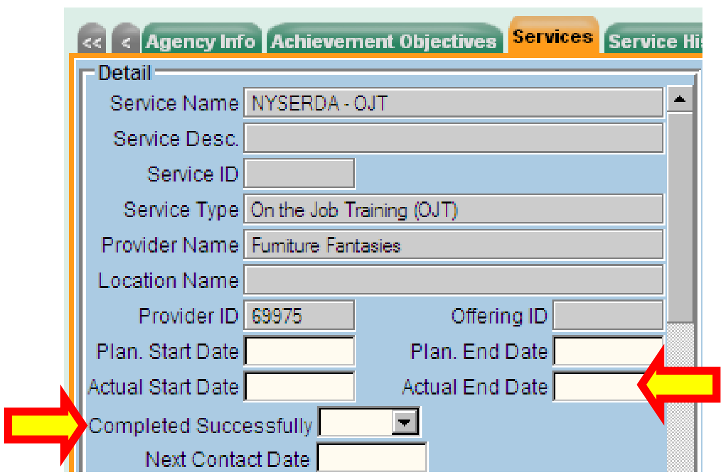
Once the trainee starts work, the placement should be recorded in the **Work Hist.** tab of the customer's OSOS record. The **End Date** field should be left blank and the **Reason for Leaving** should indicate *Still employed*. This will allow reports to be pull data related to job titles, wages, and geographical locations.



The **Training Addl Info** and **Addl Outcomes** tabs must also be completed. Refer to the OSOS guides for data entry requirements on these tabs.

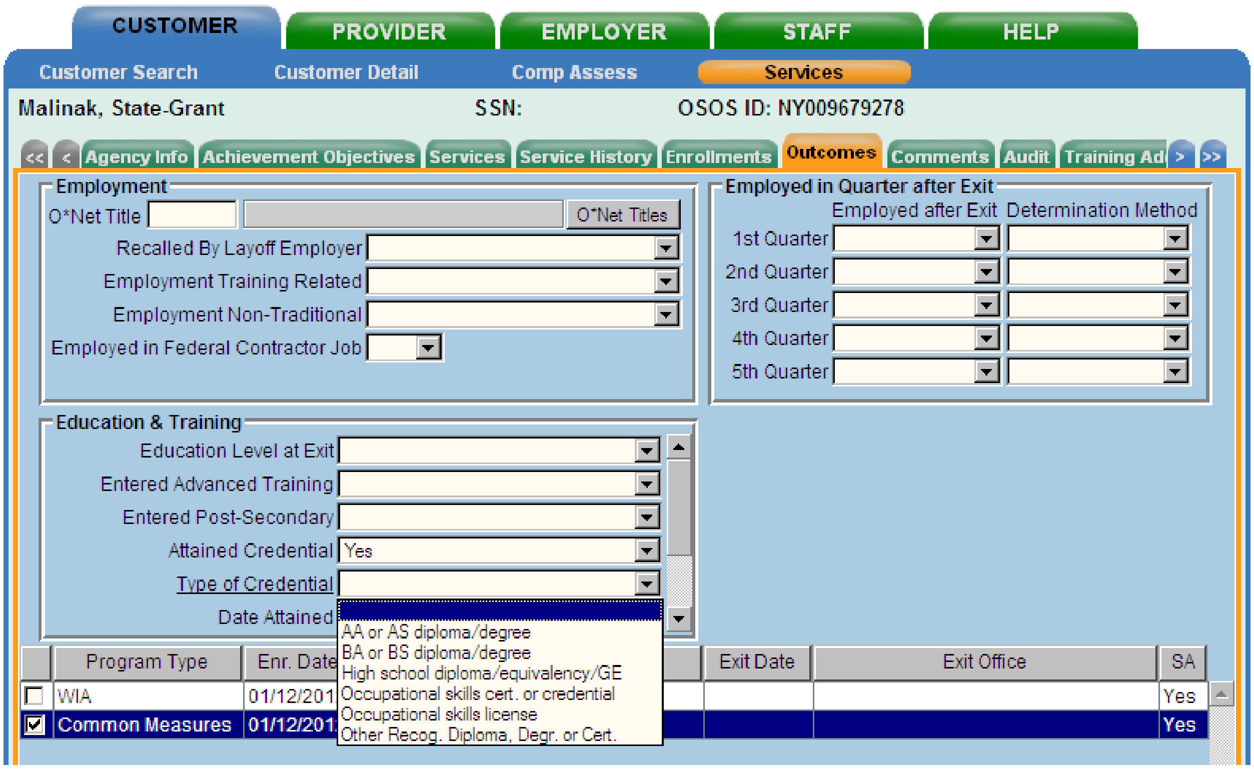


As with all services, when the service is completed, click the checkbox next to that service to highlight it. Then, enter the **Actual End Date**, indicate **Completed Successfully** and save the record.



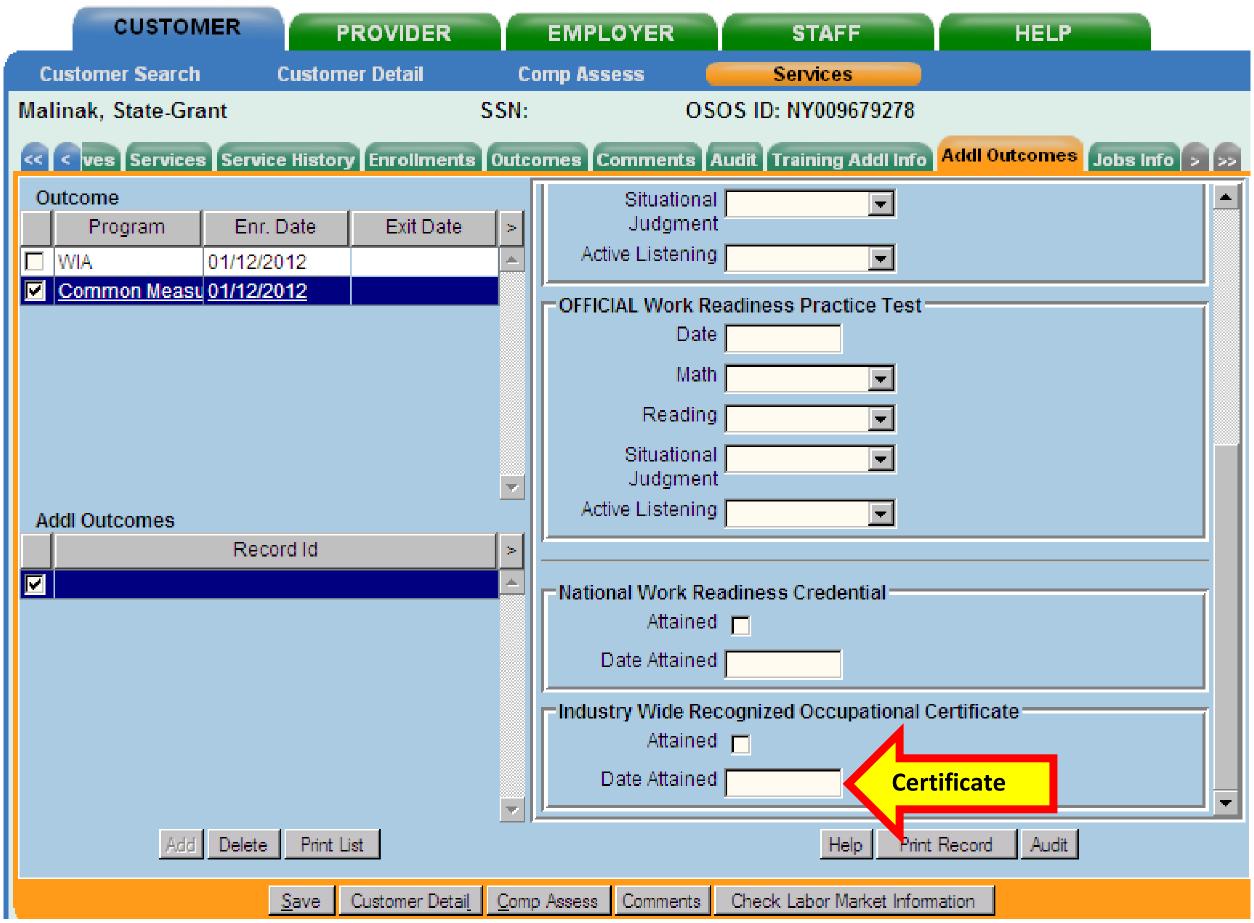
Remember to enter any earned credentials, industry wide certifications, etc. into the appropriate tabs such as the **Outcomes** and **Addl Outcomes** tabs.

For example, trainees may earn the Building Performance Industry (BPI) credential as part of their training. This would be recorded in the **Outcomes** tab under the **Common Measures** enrollment.



An industry wide certificate would be reported in the **Addl Outcomes** tab. Highlight the **Common Measures Program** and click the **Add** button to add a record. This will allow access to the data fields on the right hand side of the screen.

You may now click the **Attained** checkbox and enter the date the customer was certified in the **Date Attained** field in the format of mm/dd/yyyy. Click **Save** to save this information to the customer's record.



RESOURCES AND ASSISTANCE

NYSERDA

http://www.nyserda.org

Additional information on this funding option, including program descriptions, descriptions of services sought, proposal requirements, forms, selection process and evaluation criteria

http://www.nyserda.ny.gov/Funding-Opportunities/Current-Funding-Opportunities/PON-2033-Green-Jobs-Green-New-York-NYS-Registered-Apprenticeship-and-Building-Trades-Training.aspx

Intent to Apply emails should be sent to:

PON2033@nyserda.org

For program related concerns, please contact:

Michelle Clark
(518) 457-3106
Michelle.Clark@labor.ny.gov

TA 11-12: Data Element Validation for the Workforce Investment Act, Wagner-Peyser, Veterans Employment and Training Service and Trade Adjustment Assistance/Trade and Globalization Adjustment Assistance Programs

http://labor.ny.gov/workforcenypartners/ta/TA11-12.pdf

TA 10-03: Requirements for the Collection of Additional Participant Demographic Information upon Receipt of Intensive or Training Services under Title I-B of the WIA of 1998

http://labor.ny.gov/workforcenypartners/ta/TA10-3.pdf

O*Net Resource Center website

http://www.onetcenter.org

JobZone

https://www.nyjobzone.org

Job Matching Skills Worksheet

http://www.labor.state.ny.us/workforcenypartners//OSOS/jobmatchingskills.pdf

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