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(Revised 10-14-20)

OSOS Desk Guide

Acknowledgement:

Mr. Antwan Williams, Director of Youth System Services at RochesterWorks! created this color-coded OSOS Desk Guide to walk brand new users through a correct and timely data entry process. **OSOS youth case records must match youth hard files.** Our RW OSOS Desk Guide compliments but does not replace NYS DOL guides and resources. We welcome your feedback to maintain this Guide current and relevant. Current America's One-Stop Operating System (OSOS) v6.9.5,5.10-6.9.5.3

Current Navigator Resource: Navigator Resources webpage

http://rochesterworks.org/navigator-resources

OSOS account and Access, Technical and Programmatic Assistance, and Feedback

Connect with Bibianna Silvera-Portacio, Youth Program Specialist, at 258-3500 ext. 3505 or bsportacio@rochesterworks.org .

OSOS Access: Go to the Navigator Resources webpage **http://rochesterworks.org/navigator-resources**

- Under **New Navigator** complete:
  - OSOS WIOA Individual Access and Confidentiality Agreement 7-17 *and*
  - NYS DOL: Cornerstones of Confidentiality online training, and print Certificate.
    - Scan and email both completed forms to Bibianna.
    - 24-48 hours processing for OSOS access-username and temporary password to be emailed.

OSOS specific granted access security permission is limited to user's job responsibilities

Contact Protocol for Navigator(s):

1. Call **OSOS Help Desk (518) 457-6586** or email Help.osos@labor.ny.gov **system error messages**.
2. Connect with **Bibianna** for OSOS technical assistance and any programmatic questions and needs.
3. If Bibianna is unavailable, connect with **Mr. Theodore Jordan, Jr.,** Youth Services Manager at **258-3500 x3537** or tjordan@rochesterworks.org
4. After connecting with the OSOS Help Desk **and/or** Bibianna or Theo, for special and unique situations, contact the Director of Youth System Services, Mr. Antwan Williams via email awilliams@rochesterworks.org

Getting Started with OSOS:

- Utilize Internet Explorer (IE) versions 9, 10, or 11 for OSOS to function properly with temporary internet file allocation 200 MB or higher. Check IE version, click on Help, and About Internet Explorer.
- Do not use Google Chrome! **Make OSOS a Trusted Site.**

  Steps to follow:

  Go to Internet Explorer
  Click on Tools
  Click on Internet Options
  Click on the Security Tab
  Click on the icon for Trusted Sites
  Click on Sites
  Type in https://osos.labor.ny.gov/osos.html in the address line following "Add this website to the zone"

Click Add, Click OK→ Click OK (again) To log on, go to https://osos.labor.ny.gov/osos.html F11 key = Display in full screen. **DO NOT** use the Back arrow key to attempt to return to a previous screen as it will automatically log you out of OSOS.

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Color Key Guide:
BLACK PRINT w/blue background, becomes white print when hover over it= Module(s)
(i.e. **CUSTOMER** Module **/ PROVIDER** Module **/ EMPLOYER** Module **/STAFF** Module **/HELP** Module)
Orange print = Page currently on (i.e. ***Customer Search Page/ Customer Detail Page/ Comp Assess Page/ Services Page***)
Brown underline print = Brown tabs found at the top of the page
Blue letters with arrows = Fields within the tabs
Green Dots = Required field completion.
Red print = Advisory

Best Practices:

- OSOS case record must match hard file.
- Complete TABE test PRIOR to enrollment and CareerZone Portfolio BEFORE completing youth's Individual Service Strategy (ISS) to first to narrow focus on career interest areas.
- Utilize Navigator Resources webpage to access current WIOA Youth resources.
- Accurately enter all data in Youth Eligibility Fields in the ***Customer Detail and Comp Assess Pages*** FIRST to capture all barriers and to ensure all information is verified as being correct.
- PRIOR to creating a WIOA Youth Enrollment:
  - ⇒ 1. Verify and/or update ***Customer Detail*** and ***Comp Assess Pages*** tabs so youth information is accurate.
  - ⇒ 2. Enter the Data Element Validation (DEV) and DEV comment (SENSE Model). (Pgs.4-5) Record all eligibility obstacles documentation, coverage of Equal Opportunity and Grievance Procedures, and summarize youth's completing CareerZone Portfolio and TABE testing to help determine educational and/or employment goals in the ISS and to outline supportive and/or developmental service needs.
  - ⇒ 3. Create the WIOA Youth Enrollment in the ***Services Page*** by entering and funding one (1) WIOA Youth element/service and one (1) Design Frameworks Service (non-element) with corresponding achievement objectives and supportive comment(s) adhering to SENSE Model.
- Per NYSDOL, complete data entry within 5 business days of connecting with youth to document performance indicator(s) attainment and progress towards educational and/or employment goals.

(Revised 10-14-20)

Part 1: Data Entry-Enrollment (pgs. 3-9)

On the top of the page, click on the **CUSTOMER** Module → *Customer Search Page.*

AVOID DUPLICATION of OSOS RECORDS. Prior to creating any new youth case record, search for participant with last name, first name and/or full SSN, if have it. Verify if youth has a **CareerZone** or **JobZone account.** If either account exists prior to OSOS enrollment, then OSOS will populate with username, password, name, address, DOB, Education and Employment Status.

- OSOS Status for 16-17-year-old: **Pending→ Active *or*** for 18-24-year olds: **SS/IO→ Active**

If no match found, create a new youth case record. Click **NEW** on bottom right, proceed to *Customer Detail Page*.

Customer Detail Page

Gen. Info tab

- **Customer Data –**
  - Click **SSN** (Recording SSN optional, needed if assisting male register for Selective Service.)
  - Select Active for **Status**
  - Select Active for **Job Seeker** if youth is ready for employment. Select Inactive, if not ready.
    - In Job Readiness Assessment Tool if youth scores below 75%, then needs job readiness training.
  - **User Name/Password**: If JobZone or CareerZone Username already, do not create new one.
  - **Create User Name/Password System for all new youth:** 8-character Username and 6-character Password with mixture of numbers and letters, i.e. Name and NY#.
  - ***Required*: Date of Birth Gender**
  - ***Required*: Portfolio Level *New!* Changing a youth's record from JobZone to CareerZone: Portfolio Level** →Click on drop down box and change from JobZone and choose Young Adult, then when look at top right corner of *Customer Detail Page* will see changed from JobZone to CareerZone.
  - ***Required*: Address US Citizen**

- **Customer Assignment** Next to **Change** click on down arrow "Assign to Me" and click **Change Office** to choose Monroe County, then Rochester/Monroe WAE, and then add your agency.
- **Ethnic Heritage & Race *Required*: Ethnic Heritage & Race**. If not disclosed, choose "Not Disclosed".
- **Education & Employment –*Information is frozen at enrollment, do not change after enrollment. * Not attending school per WIOA, considered out of school youth (OSY)**:
  1. Adult Education Programs under WIOA Title II
  2. YouthBuild
  3. Job Corps
  4. Dropout Re-engagement programs, not funded by public K-12 school system
  5. High School Equivalency Programs, not funded by the public K-12 school system

  Click down arrow(s) to answer: **Education Level School Status Employment Status**
  - **Youth with an IEP Cert. under Education Level at enrollment, select 12 Grad - no Diploma.**
  - **School Status: 'Out of School Youth' (OSY), if in one of the following categories:**
    Not attending School or Secondary School Dropout
    Not attending School: Secondary School Graduate/Equivalent
    Not attending School: Within Compulsory Age

- **Contact Preferences -** Check contact boxes as requested.

Customer Detail Page (continued)

Eligibility tab: **Tip: Begin with Disability Info section**

- **Disability Status:** ***Required:*** **Youth Eligibility Field:** Select one: **Disabled** **Not Disabled** **Not disclosed**
- **Income Info:** ***Required:*** **Youth Eligibility Field:** Lower Living Standard: **No** and Local Priority- Leave blank. **If OSY low income eligible, choose ONLY ONE: Income 70% LLSIL: Yes or High Poverty Area: Yes Last resort/option for low income documentation if unable to determine in another way.**
- **Migrant Info:** Select **No** for Migrant / Seasonal Worker. If migrant worker, select **Yes** and complete fields.

Add'l Info tab

- **Military Service/Selective Services (SS) –** ***Required:*** **(**Record SS number only: No need for hard copy file.) **Youth Eligibility Field (birth gender male at 18 years old (+): SS** Registration required for WIOA youth services eligibility. **SS** only shows in **Customer Data** if **Male** in **Gender**. If older youth is a Service Veteran, choose **Yes** and complete appropriate fields including if homeless, under Current Housing Homeless Click **Register/Lookup** and redirected to (http://www.sss.gov/default.htm). If assisting a male to register for Selective Service, click **Register**. Checking registration for a male youth 18+, click **Check Registration**. **Selective Service Online Registration Search**, input **Last name**, *you will need Social Security Number* and **DOB**, and click **Submit**. If Matched Record shows, copy the Selective Service Number and paste onto youth's **SS** OSOS record. Until January of his 26th birthday year, youth must notify Selective Service within 10 days if there any changes.
- **Employment Preferences and Shift Preferences**

Pgms/PA OSOS Hard Exits or manual exits are done in the **Pgms/PA** under Non-Service Event in the ***Customer Detail Page*** (see page 12 for directions on hard exit) NOTE: There's a bug with the non-service event button in OSOS. Close out all services and exit them with appropriate hard exit reason under the Enrollments tab.

- **Public Assistance –** If applicable for any section, enter **Yes** and **Date** verified (Hard file copy).

Objective tab: ***Required:*** Employment Objective, Desired O*Net, and Acceptable Job Locations

- **Employment Objective**: For youth not seeking employment, enter interest statement. For example, a youth who enjoys interacting with animals may have an objective: "To work with animals."
- **Desired O*Net:** O*Net Title: ***Required*** **Search for at least one (1) Occupation Title with corresponding O*Net Code must appear for every youth, under Occupation Search with keyword on** https://www.onetcodeconnector.org/
- Click **Add a Job Title** then add correct O*Net Title and O*Net Code and complete green dot fields. If applicable add Experience in terms of Year(s) and Month(s).
- **Acceptable Job Locations Maximum Zip Radius:** Enter youth's zip code/how many miles willing to travel.

Work History: ***Required:*** **Update employment history on an ongoing basis to include:** Youth Employment Program (YEP) internship, employment, job shadowing, mentoring, military, volunteer, life experiences, and pre-apprentice.

- **Search for correct Occupational Title with corresponding O*Net Code under Occupation Search with keyword on** https://www.onetcodeconnector.org/
- Click **New Job Entry** next to Job Title, utilize the **O*Net Titles** Add correct O*Net Title and O*Net Code.

Ed/Lic tab: This is not youth tab requiring completion, however, when doing new enrollment will need to check off 3 boxes "No Information Provided", to avoid getting an error message.

Customer Detail Page (continued)

Skills tab

- **Additional Skills Text:** ***Two to three combinations of hard and soft skills.*** Utilize O*Net/CareerZone.

Comments tab** **(SENSE Model): REQUIREMENT FOR ALL COMMENTS
SENSE Model: Standard for writing objective and effective OSOS case notes relevant to youth workforce development. SENSE (Situation, Evaluation, Next Steps, Sufficient Information {Say What You See}, Employment-Related Information Only).

Quality Case Notes: A Valuable Tool video and SENSE Model: Check Navigator Resources Webpage
http://rochesterworks.org/navigator-resources

Placing an OSOS comment (SENSE Model) is the ONLY thing can do (no Achievement Objective, nor any WIOA Youth Element/Service) when unable to connect with a youth in person, via phone, text, email, and social media to document outreach attempt(s)/effort(s). Click Comments found at the bottom of the screen.
Comments tab: Examples from Comment (SENSE Model) Template (Navigator webpage)

1. **DEV comment**: "DEV: OSOS Updated in full. Provided and reviewed with youth the EEOC and Grievance Procedures. DOB verified with NYSDL or NYSLP or NYSID, or UI MIS/database or Other ____ and DOB tab completed. Youth eligibility obstacles include: _____. Documentation including income (if applicable), pre-TABE testing and CareerZone Portfolio are documented in OSOS and in the hard file. Youth employment and/or educational goals include _____. Youth needs transportation assistance to attend _____. Selective Service registration was verified/cannot be verified/assisted youth to register."
2. **Individual Service Strategy (ISS): Objective Assessment comment for each youth:** Document completion in one or two comment(s) maximum for assessment categories (a. through i):
    a. Academic Level: TABE Testing
    b. Basic Skill Level: TABE Testing
    c. Occupational Skill Level: Job Readiness Assessment Tool or Work Keys testing
    d. Prior work experience: Work experience on application
    e. Employability: CareerZone Work Importance Profiler
    f. Interests: CareerZone Interest Profiler
    g. Aptitudes: CareerZone Abilities
    h. Supportive service needs and who will be providing them
    i. Developmental needs
3. **Progress on Youth Employment Program (YEP) internship:** Documenting acquiring transferable new skills from internship, job shadowing, mentoring, military, volunteer, life experiences, and pre-apprentice. "Spoke with youth and she is doing well in her YEP internship at St. Mary's Patient Transport Department. She is learning communication skills in in providing directions to patients or guests to different areas from the hospital, and how to answer the phone professionally."
4. **Progress Update/Note (Youth Disengaged):** Attempted to contact youth on the following date(s) _____ via text/via phone/ in person/via social media but was not successful in connecting with youth. Phone was not in service/unable to leave a voicemail as it is not set up to take messages."
5. **Transportation Assistance Request:**
   "Submitted Transportation Assistance Request to RW for a monthly bus pass for YEP internship at St. Mary's."
6. **Incentive Request:**
   "Submitted Incentive Request to RW for Placement in Employment or Education 2nd Quarter after Exit."

Tests tab in the *Customer Detail Page* Record assessments including academic and basic skill level testing assessments like TABE or GAIN or BEST Plus (Pre and Post-tests) results *only.*

***NOTE:* The dropdown options and the scoring do not appear to be customized based on the assessment. If the test options do not correspond completely with the information trying to input, then fill it out as accurately as possible and include the rest in a comment (SENSE Model).**

Tests tab

Click **Add Test** on bottom of screen.

- **Test Detail:** Green Dots fields are required
  - Click and complete **Test Type**
  - If TABE testing, choose **TABE 7-8, 9-10, 11-12**
  - Click and complete **Office**
    - **Center for Youth *or* Community Plce Greater Rochester *or* Monroe 2 BOCES, *or* Refugees Helping Refugees, *or* Rochester Works Inc., *or* Starbridge, *or* Urban League of Rochester**
  - Click and complete **Completed Date**

Then on the right, click **Test Details**

- **Test Details- Webpage Dialogue:** Green Dots fields are required. Fill one at a time.
  - Click **Category** and fill in
  - Test Name will appear as chosen before
  - Click **Test Version** and fill in
  - Click **Functional Area** and fill in
  - Test Completed date will appear as filled in before
  - Once completed **Category**, **Test Version** and **Functional Area** then the Score, GLE, and EFL fields .

Do Reading 1st.Repeat same process as above to input Mathematics.

If youth's pre-TABE Test results in either Reading and/or Mathematics sections(s) are within either **Low Adult Secondary Education/Exit ESL** or **High Adult Secondary Education** then youth has reached and/or exceeded 9th grade level. **No further Post-Test is required.** Youth pre-TABE tested below 9th grade level is basic skills deficient. Post-TABE Test(s) completed by youth are required prior to yearly anniversary of the **First Youth Service Date.**

Primary Language tab **REMINDER**: Complete only for youth whose primary language is not English.

- Click **Add** Under Primary Language, choose applicable language or Other Not Listed.
- Under Other Language- type name of language then Under Language Assistance Needed, choose one: **No Assistance Needed** **Oral assistance needed** **Sign Language** **Written Translation**

DOB tab: ***Required:*** **Youth Eligibility Field criteria** (Hard file copy) Validate the Date of Birth, if no date in the UI DOB box. Click **Add** found towards the bottom left hand side of the screen.

- **Data Element Verification:** **Verification Source** Select the document source to validate DOB. **Customer Detail** Enter #s in DMV# box, ONLY IF ID is a NYS Permit/NYS ID card/NYS Driver's License.

(Click **Save** on the bottom of the *Customer Detail Page.*

(Revised 10-14-20)

Go to the Comp Assessment Page

Employment tab

- **Job Behavior and Skills:**

  Poor Work History: If **checked** post comments. (Comment examples listed below.)

  1. Employment Behavior: Inappropriate interview attire.
  2. Job Seeking Skills: Lack of resume/portfolio, unable to properly complete a job application.
  3. Job Keeping Skills: Client has never been employed and would benefit from learning job retention skills, communicating effectively and how to build strong working relationships with co-workers.
  4. Summary of Occupational Strengths & Weaknesses: Strengths: Client is motivated to obtain employment, pleasant demeanor. Weaknesses: has no job experience and has never been on a job interview.

- **Youth Needing Additional Assistance: Youth Eligibility Field** Select **NO** from the dropdown box.
- **Serious Barriers to Employment** Select **NO** from the dropdown box. (No WIOA definition.)
- **Cultural Barriers to Employment:** Select one. **YES** **NO** **NOT DISCLOSED** If choose **YES** then explain cultural barriers (attitudes, beliefs, customs or practices that may make it hard for youth to find work) keeping in mind this is anything individual identifies as obstacle in attaining goals..

Education tab

- **Math & Reading**
- Basic skills deficient/Low Levels of Literacy: Select **YES-Basic Skills Deficient** if youth functions below a 9th grade level based on TABE Reading and/or Math scores. Select **No** if youth functions at/above a 9th grade level.
- English Language Learner: – **Yes** or **No**

Family tab

- **Personal Information**
- Marital Status
- Family Status
- Is customer pregnant/parenting youth or non-custodial parent, i.e. father? If **Yes**, add the child's info to the Members of Household field by clicking on the **Add a Member**→**Household Members—Webpage Dialog**→ **Name** and **Relation**→**Submit**.

Legal tab

Offender Status? **(Employment related restrictions)** Select **Not Applicable** or **Yes**

- Offender: An adult or juvenile who:
  - Is or has been subject to any stage of the criminal justice process.
  - Requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction.

Housing tab

- **Housing Information: Youth Eligibility Field: Foster/Homeless** (***Required:*** Attestation of Homeless Status)**/Runaway** **Current Housing** **Change: must be recorded on this tab.**

(Click **Save** on the bottom of the ***Comp Assessment Page.*****)**

(Revised 10-14-20)

Go to the Services Page

Review 14 WIOA Elements on **Navigator Resources webpage: http://rochesterworks.org/navigator-resources**

Final Rule #681.320: WIOA Youth Enrollment: (1) The collection of information to support an eligibility determination, (2) the provision of an objective assessment, and (3) Participation in any of the fourteen (14) WIOA youth elements/services.
Four (4) youth OSOS services.

- **Youth - Intake and Eligibility Determination (non-element) ***
- **Youth – Objective Assessment (non-element: pre-TABE/Other Testing, and CareerZone) ***
- **Youth – Development of ISS (non-element) ***
- **Youth – Update ISS/Objectives & Services History (continues ISS, non-element) ***

OSOS WIOA enrollment: Create (3) three Achievement Objectives: One (1) element of the 14 WIOA Youth Elements based on the ISS, one (1) for Intake and Eligibility Determination, and one (1) for Youth – Objective Assessment.

1. Create and fund the element (select **WIOA Youth Local/2020**)
2. Create and fund Youth - Intake and Eligibility Determination (select **WIOA Youth Local/2020**)
3. Create and fund Youth -Objective Assessment (select **WIOA Youth Local/2020**)
4. Complete for each one above, a supporting comment (SENSE Model) summarizing both element/services.

NOTE: Planned and Actual Start Dates are the same for both. Follow step-by-step directions in both the **Achievement Objectives** and the **Services tabs**.

Objective Assessment (a. through i): Document completion in one or two comment(s) SENSE Model:

a. **Academic Level: TABE Testing**
b. **Basic Skill Level: TABE Testing**
c. **Occupational Skill Level: Job Readiness Assessment Tool or Work Keys testing**
d. **Prior work experience: Work experience on application**
e. **Employability: CareerZone Work Importance Profiler**
f. **Interests: CareerZone Interest Profiler**
g. **Aptitudes: CareerZone Abilities**
h. **Supportive service needs and who will be providing them**
i. **Developmental needs**

IMPORTANT: Local WDB decision: Active status youth 60-day OSOS data entry: **Navigators, create at least one (1) achievement objective, one (1) element/service, and one (1) comment (SENSE Model) *every 60 days.* Be sure to provide specific progress case notes in comments (SENSE Model) to document performance indicator(s) attainment and progress towards educational and/or employment goals.**

Only place comment (SENSE Model) *IF* unable to contact/connect with youth if contact information is not up to date, to specify documented attempt, thus, creating record of lack of contact or youth disengagement.

Achievement Objectives tab

- **Individual Service Strategy (ISS): Completed within 60 days of enrollment summarizes educational and/or employment goals, planned activities, elements/services to be used, and Performance Indicators youth may potentially count towards.**

Services Page (continued)

(Click **New Objective** found at the bottom of page.)

- **Achievements Objectives** (Each aligns with goals identified on the ISS.)
  1. Input specific goal **Achievement Objective**.
  2. Specify: **Type of Goal** (Basic Skills, Occupational Skills, or Work Readiness).
  3. Select **Set, but Attainment Pending*** in the **Goal Attainment**
  4. Enter the **Planned Start Date*** and **Planned End Date**
  5. Enter the **Actual Start Date***
  6. Enter an **Evaluation Date** Date falls between the Planned Start Date and Planned End Date.

Services tab (Click **New Service** on bottom of page, for new services only **Redirected to PROVIDER Module**

PROVIDER Module

General Info tab

- **Provider Information**
  - Enter "agency name" in **Provider Name** and type: "**Youth -"** in **Service Name** to find Elements/Non-elements.

  (Click on **Search** at the bottom of the ***Offering Search Page.*****)**
  - Select active services for active status youth, click **Service Name** matching **Achievement Objective** in the **Achievement Objectives tab**.
    - **Youth - Adult Mentoring**
    - **Youth - Alternative Secondary School Services**
    - **Youth - Comprehensive Guidance and Counseling**
    - **Youth - Development of ISS (non-element) ***
    - **Youth - Educ. Concurrent w/Workforce Preparation**
    - **Youth - Entrepreneurial Skills Training**
    - **Youth - Financial Literacy Education**
    - **Youth - Intake and Eligibility Determination (non-element, WIOA Application) ***
    - **Youth - Job Shadowing**
    - **Youth - Labor Market and Employment Information Services**
    - **Youth - Leadership Development**
    - **Youth - Objective Assessment (non-element, pre-TABE/Other Testing, and CareerZone) ***
    - **Youth - Occupational Skill Training**
    - **Youth - On-the-Job Training (OJT)**
    - **Youth - Other Work Experience**
    - **Youth - Pre-Apprenticeship Program**
    - **Youth - Prep. For Postsecondary Training**
    - **Youth - Summer Employment/Internship**
    - **Youth - Supportive Services, Childcare**
    - **Youth - Supportive Services, Housing**
    - **Youth - Supportive Services, Other**
    - **Youth - Supportive Services, Transportation**
    - **Youth - Supportive Services, Dependents**
    - **Youth - Tutoring, Study Skills Training**

- **Youth - Update ISS/Objectives & Services History (non-element) ***
- **Youth - Year-Round Employment/Internships: Please use only for the Youth Employment Program (YEP) internship.**

Services Page (continued)

Click **Schedule** at the bottom of the page. **Redirected back to the *Services Page***

Services tab

- **Detail**
  - Enter **Plan. Start Date**, **Plan. End Date** & **Actual Start Date** (Make planned end date 60 days out.)
  - In the **Program Service Type** drop down box, select **Youth Services**
  - In the **Achv. Objective** select the **Achievement Objective** coinciding with Element/Service.
- **Funding**
  - Enter **$1** in **Total Funding** then click on the **Add** to the right, see **Funding - -Webpage Dialog** screen.

In **Funding-- Webpage Dialog**, Select **WIOA Youth Local**, and select **WIOA Youth Local/2020** for current Program Year 2020. Add the **$1** to **Obligated Amount** and click **Ok**. **(**Click **Save** on the bottom of the ***Services Page.*****)**

***Go to *Customer Search Page* OSOS refreshes, WIOA youth enrollment official. ***

Go back into the Services Page

Click on the Enrollments tab, to enter the Enrolled in Education status.

Enrollments tab

- **Enrollment Info If** enrolled in a formal educational situation **at the time of WIOA registration or at any time during their WIOA enrollment** then fill the **Enrolled in Education** with a **Yes** to include BOCES, alternative schools, tutoring situations, proprietary and post-secondary schools.

(Click **Save** on the bottom of the ***Services Page.*****)**

Empl.Outcomes and Trng. Outcomes tabs in *Services Page* are replacing Outcomes tab. **Record assessments only under Tests tab in the *Customer Detail Page* including academic and basic skill level testing. You will not need to transfer previously entered data on Outcomes tab in *Services Page* from Lit/Num Testing to Tests tab in the *Customer Detail Page***

Comments tab **(SENSE Model: pgs. 4-5)**

Youth Workforce Development: Data Management and Validation of Services

Changes must be documented in OSOS within 5 business day of connecting with youth per NYSDOL.

Required: Once a quarter, dually signed (Youth and Navigator Objectives and Services History): Need to update as continuation of the Individual Service Strategy (ISS) for accountability purposes and to capture any changes to youth's educational and/or employment goals. *Utilize "Youth – Update ISS/Objectives & Services History" service* (not an element) on OSOS when completing this once a quarter. Print Objectives & Services History once a quarter, youth signs and dates on the Customer Signature line and the Navigator signs and dates below youth. Completion of Objectives & Services History/ISS validates and authenticates discussions and conversations resulting in summary of provided elements/services and achievement objectives to youth, thus capturing changes in educational and/or employment goals. Then it is placed in youth's hard file.

Printing the Objectives and Services History: Achievement Objectives tab

At the bottom, click **Print** to bring up the Objectives and Services History. Click **Print** and both youth and Navigator sign once a quarter and copy is placed in hard file.

Part 2: Updating/Closing out Achievement Objectives and Elements/Services: (pg. 11)

Go to the Services Page

When updating any of the tabs (i.e. Achievement Objectives tab or Services tab) found on the *Services Page* click on the service(s) listed below the gray bar so fields become white and active to make updates/changes.

Achievement Objectives tab

- **Achievement Objectives**

  Click on element(s)/service(s) listed below gray bar **Achievement Objective/Type/Attainment**.

  - Update **Goal Attainment**, change **Set, but attainment pending** to **Attained** **OR** **Set, but not attained**
  - Consult with Bibianna prior to using *Set, but Cancelled.
  - Add the **Actual End Date**.
  - **Closure Reason**
  - If Achievement Objective in **Goal Attainment** is **Attained**, select **Objective Completed**.
  - If Achievement Objective in **Goal Attainment** is **Set, but not attained**, select **Objective Not Completed**.

(Click **Save** on the bottom of the ***Services Page.*****)**

Services tab

- **Detail**

  Click on service(s) listed below gray bar
  Provider Name/Service Name/Actual Start Date/Actual End Date/Program Svc Type.

  - Add the **Actual End Date**.
  - Select **Yes** from the **Completed Successfully**.
  - **Select No** if not completed and add comment (SENSE Model) notating reason not completed.

Click **Comments** found at the bottom of the ***Services Page.***

Comments tab **(SENSE Model: pgs. 4-5)**

Required: Address outcome of the goal attainment for each Achievement Objective.
(Click **Save** on the bottom of the ***Services Page.*****)**

(Revised 10-14-20)

Part 3: "Exiting Youth for Youth Purposes": Follow Up Services for 12 Months (pg.12)

Go to the Services Page

IMPORTANT: Youth in follow up status once a quarter OSOS data entry*: Utilize one (1) of the five (5) allowable follow up elements, with corresponding comments (SENSE Model), *once a quarter*, in the 12 months after youth exits programming.** Connect to provide critical element(s)/service(s) to ensure youth success and progress towards educational and/or employment goals and to document performance indicator(s) attainment. **Five (5) allowable WIOA follow-up elements: Adult Mentoring, Financial Literacy Education, Labor Market Information (LMI)** in demand sectors/occupations (career awareness, career counseling, and career exploration services), **Activities that help prepare youth for and transition to postsecondary education and training, and Supportive Services**. In Program Service Type, select **Follow Up** and use a follow up allowable element/service to move youth to follow up status and support with comment (SENSE Model). Use Youth – Objective Assessment to document assessment. Per NYSDOL use Youth – Follow up, all other ONLY when youth states not to contact. **Only place comment (SENSE Model) *IF youth refuses to receive follow up services, or unable to contact/connect.

Services tab (Click **New Service** towards bottom of page; **Redirected to PROVIDER Module.)**

PROVIDER Module

General Info tab.

- **Provider Information**
  - Enter "agency name" in **Provider Name** and type: "**Youth -"** in **Service Name**. (Click **Search** at bottom of ***Offering Search Page.)***
  - Important: For youth in follow up status, select follow up services only, select from 5 (five) allowable WIOA Element(s)/Service(s) *or* Objective Assessment under **Provider Name**:
    - **Youth – Follow-up Adult Mentoring**
    - **Youth – Follow-up Financial Literacy**
    - **Youth – Follow-up LMI**
    - **Youth – Follow-up Postsecondary**
    - **Youth – Follow-up Supportive Service**
    - **Youth – Follow-up, all other (non-element) ***
  - Click **Schedule** at the bottom of the page.

Redirected back to the ***Services Page***

Services tab

- **Detail**
  - Enter the **Plan. Start Date**, **Plan. End Date** and **Actual Start Date**.
  - Enter **Next Contact Date** - a reminder date to follow up on outcomes.
  - In the **Program Service Type** drop down, please select **Follow Up**.
- **Funding**
  - Enter **$1** in **Total Funding** then click on the **Add** to the right, see **Funding - -Webpage Dialog** screen.
  - In **Funding-- Webpage Dialog**, Select **WIOA Youth Local**, and select **WIOA Youth Local/2020** for current Program Year (PY) 2020. Add **$1** to **Obligated Amount** and click **Ok**

(Click **Save** on the bottom of ***Services Page.*) Go to the *Customer Search Page* so OSOS refreshes.**

Service tab **Update the Follow Up Service**

- **Detail**
  - Enter **Actual End Date**.Select **YES** from **Completed Successfully**.

Comments tab **(SENSE Model: pgs. 4-5)** Click **Save** on the bottom of the ***Services Page.***

(Revised 10-14-20)

Part 4: OSOS 90-days Soft Exit, OSOS Hard Exit Exemptions, and Placing Temporary Hold (pg. 13)

Go to the Services Page

Enrollments Tab

90 Days Soft Exit (The Rule)

1. **ALL** Achievement Objectives and Elements/Services must be CLOSED OUT.
2. Click **Comments** at bottom of the ***Services Page*** to explain reason youth is being soft exited (SENSE Model) documenting progress towards attainment of employment and/or educational goals.
3. OSOS 90-days Soft Exit will occur unless co-enrolled as an adult or dislocated worker at RWCC.

OSOS Hard Exit: Youth is excluded from counting in Youth Performance Indicators based on the six exemption reasons listed below under Non-Service Event in the **Pgms/PA** in ***Customer Detail Page***
NOTE: There's a bug with the non-service event button in OSOS production environment in the **Pgms/PA**. Just close out all services and exit them with appropriate hard exit reason under the **Enrollments Tab**.

Pgms/PA Before OSOS Hard Exit or manual exit was done under the **Enrollments Tab** in ***Services Page***, however, now it is done in the **Pgms/PA** under Non-Service Event in the ***Customer Detail Page*** See NOTE above.
*** Before OSOS will allow saving a Non-Service Event all Achievement Objectives and Elements/Services must be closed out.** Click **Comments** **(SENSE Model: pgs. 4-5) Document hard exit exemption reason.**

- Click Non-Service Event
- Click Add
- Customer Non-Service Event
- Under Non-Service Type choose one (1) of the six (6) hard exit exemption reasons as listed below:
  - **Institutionalized (Incarcerated/Resident of 24 HR Support Facility)**
    - **Use if institutionalized 90 days or more.**
  - **Receiving Health/Medical Treatment**
    - **Use if receiving treatment 90 days or more.**
  - **Participant Deceased**
    - **Once utilize, no new services can be added.**
  - **Reserve Forces Called to Active Duty**
    - **Use if will be in active duty 90 days or more.**
  - **Foster Care (Youth only)**
    - **Use if youth is moving away from area.**
  - **Correctional Institution (Criminal Offender)**

(Click **Save** on the bottom of the ***Customer Detail Page.*****)**

Placing Temporary Hold - if youth temporarily inactive *Go to the Services Page*

Enrollments Tab
Under **Program Type** click on **Common Measures**
On the left-hand side under **Enrollment Info** towards the bottom click on **Holds** , click **Add**.
Complete start date and end date. Reason: Choose one: Delay before start of training, or Health/Medical or Family Care or Temporary Move from area. Click Save Click **Comments** to explain reason for placement of temporary hold on youth account utilizing SENSE Model. **(**Click **Save** on the bottom of the ***Services Page.*****)**

Part 5 – Documenting Youth Performance Indicators (pgs. 14-17)

After searching for youth, go directly to the Services Page. (Wait for redirection.)

Change in how assessment tests are recorded and where recorded in OSOS:

Record assessments including academic and basic skill level testing assessments like TABE (pre-TABE and Post-TABE tests, Gains, and Best Plus results *only* in the Tests tab in the *Customer Detail Page*

Outcomes tab in *Services Page* **Do not use.**

Credential Attainment *or* Placement in Employment and/or Education – 2nd and/or 4th Qtr. after Exit.

NOTE: If a youth attains a HS diploma or HS equivalent, then youth must also be employed or enrolled in education or a training program leading to a postsecondary credential to count for Credential Attainment. Documentation required in youth's hard file and comment (SENSE Model).

Enrollments Tab: To enroll in Credential Attainment Youth Performance Indicator
Under **Program Type** click on **Common Measures**

- **Enrollment Info**
  - **Education Level at Exit** Select **Yes** To count for this youth performance indicator.

Measurable Skills Gains: Youth in education or training achieving measurable skills gains toward credential or employment. Documentation required in youth's hard file and comment (SENSE Model).

Empl.Outcomes and Trng. Outcomes tabs in *Services Page* are replacing Outcomes tab.
Empl.Outcomes Tab: (If applicable, complete.)
Type: **Military** ***or*** **Registered Apprenticeship** ***or*** **Unsubsidized Employment**

Start Date

Click **Add Outcome**

- **Employment**
  - Select **Type** **from 3 choices below:**
  - **Military** **then enter Military Branch**
  - ***OR***
  - **Registered Apprenticeship** **DO NOT fill in RAPIDS** (Registered Apprenticeship Partners Information Data System) as not required in NYS
  - ***OR***
  - **Unsubsidized Employment** **then enter Self Employed** Select one, as **must be completed** even though it does not have a green dot: **No** **Yes**
  - **Then:** Input **Start Date** and (if applicable) **End Date**
  - **Employer Name** Enter either full name or part of the employer's name and click on the **Employer Lookup** **If there is no OSOS record for employer, an OSOS error message will appear and then will need to manually enter information.**

Services Page (continued)

- Click **Employment Services** to link previously scheduled element(s)/service(s) with an outcome by clicking **Ok** and the element(s)/service(s) will populate the **Seeker Service ID Field**.
- **Manual Wages** **Enter ONLY for youth without an SSN** to count for Median Earnings 2nd Quarter after Exit Youth Performance Indicator for wage data related to the employment outcome. All other median wage calculations done through wage matching in OSOS.
- Click **Save**

➢ **Characteristics** (To the right of page.) When applicable, complete to document details on employment type.

- **Training Related**: Training provided that led to this job? **Yes** or
- **Non-Traditional**: Occupation where one gender is <25% of employed persons? **Yes** or **No**
- **Hired by Layoff**: Youth was hired by company that laid them off? **Yes** or **No**
- **FCJL Job**: Federal Contractor Job Listing? **Yes** or **No**
- **Work Based Training**: Registered Apprenticeship, OJT, Incumbent Worker Training, Transitional Job? **Yes** or **No**
- **Disaster Relief**: Any hiring associated with disaster relief employment grants? **Yes** or **No**
- **UI Covered**: Is a job covered by Unemployment Insurance? **Yes** or **No**
- **Fringe Benefits**: Does job offer vacation, retirement, etc? **Yes** or **No**
- Click **Save**

Click **Outcome Details** bottom right to document Employed after 2nd and 4th Quarter after Exit.

➢ **Employment Outcome Details** "Green Dots fields are required, other fields complete when applicable.)

- Scroll down slightly in screen.
- Click **Add** at bottom of the screen so fields become white and active to input data.
- Enter **Effective Date**
- **Still Employed?** Answer **Yes** or **No**
- **Advanced to New Position** Answer **Yes** or **No**
- Answer **Hours Per Week**
- Answer **Part-Time** Answer **Yes** or **No**
- **Salary** Type amount.
- Answer from drop down list **Salary Unit**
- Either search for correct Occupational Title with corresponding O*Net Code to input, under Occupation Search with keyword https://www.onetcodeconnector.org/ or click on **O*Net** to search with key word(s) and choose correct job title which will populate with O*Net Code.

➢ **Skill Gain: At completion of on-the-job training (OJT), participant is in unsubsidized employment, and it must be recorded in the Employment Outcomes tab. If skills gain relates to an apprenticeship, it must be recorded in the Employment Outcomes tab.**

- If need to enter skill gain, click on white field on **Type** to choose from drop down box:
  Training Milestone ***or***
  Skills Progression
- Skills Progression: Commonly used measurable skills gain for employment outcomes.
- Click **Save**

Services Page (continued)

Trng. Outcomes Tab (If applicable, complete.)
Secondary Education ***or*** **Post Secondary Education** ***or*** **Unsubsidized Employment**
Click **Add Outcome**

- **Training/Education:**
  - Click **Category**
  - Select **Secondary Education** ***or*** **Post Secondary Education** ***or*** **Unsubsidized Employment**
  - Click down arrow **Type**
  - Click down arrow and select **GED or HS Equivalency** ***or*** **Post Continuation or Alternative School**
  - Enter **Enroll Date**
  - Enter (when applicable) **Completion Date**
  - Click down and select **Attainment Status**
    In-Process no intended credential ***or***
    In-Process intended credential pending ***or***
    Completed- attained intended credential ***or***
    Completed- did not attain or intend credential ***or***
    Incomplete- did not attain or intend credential
  - **Major/Program** Type name
  - **Degree/Cert./Cred.** Type amount
  - **School/Institute** Type amount

Click **Outcome Details** bottom right to document Education/Training after 2nd and 4th Quarter after Exit.

- **Training Outcome Details** "Green Dots fields are required, other fields complete when applicable.)
  - Click **Add** at bottom of the screen so fields become white and active to input data.
  - Enter **Effective Date**
  - **Still Enrolled?** Answer **Yes** or **No**
  - Answer **Hours Per Week**
  - Answer **Part-Time** Answer **Yes** or **No**
  - **Salary** Type amount.
  - Answer from drop down list **Salary Unit**

- **Skill Gain: If skill gain relates to on-the-job training (OJT), it must to be recorded in Training Outcomes tab.**
  - If need to enter skill gain, click on **Type** drop down box to choose:
    EFL Gain via Credits or Carnegie Units Credits towards HS Diploma or Equivalent ***or***
    Secondary/PSE Transcript/Report Card ***or***
    Training Milestone ***or***
    Skills Progression
  - Click **Save**
  - Click **Save** on the bottom of the ***Services Page.***

(Revised 10-14-20)

Go to the Customer Detail Page

Documenting Assessment Test(s) Results:

Tests tab **in the** *Customer Detail Page* **Record assessments including academic and basic skill level testing assessments like TABE (pre-TABE and Post-TABE tests), Gains, and Best Plus results *only* in the** Tests tab **in the** *Customer Detail Page*

Completed post assessment tests input required prior to yearly anniversary of **First Youth Service Date**, if youth below 9th grade level (basic skills deficient) in either Mathematics or in Reading or in both**.**

If the youth's Post-TABE results in either Reading and/or Mathematics section(s) are within either Low Adult Secondary Education/Exit ESL or **High Adult Secondary Education** then **youth has reached and/or exceeded 9th grade level. If there is a one grade level gain in Reading or Mathematics, it counts as a measurable skill gain.**

(Click **Save** on the bottom of the *Customer Detail Page*.**)**

Congratulations! You are finished.