

# NEG - OJT (NEG-09) OSOS Guide

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## PURPOSE

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

All New York State LWIAs are eligible to participate in this grant.

Some field names in the desk guides are abbreviated, to match how they are displayed in OSOS. 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) – OJT funding must be e-mailed to [OJT-NEG@labor.ny.gov](mailto:OJT-NEG@labor.ny.gov).

OSOS 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.

The NEG OJT grant begins October 1, 2012 and ends June 30, 2014. The NEG ARRA OJT grant ended September 30, 2012.

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

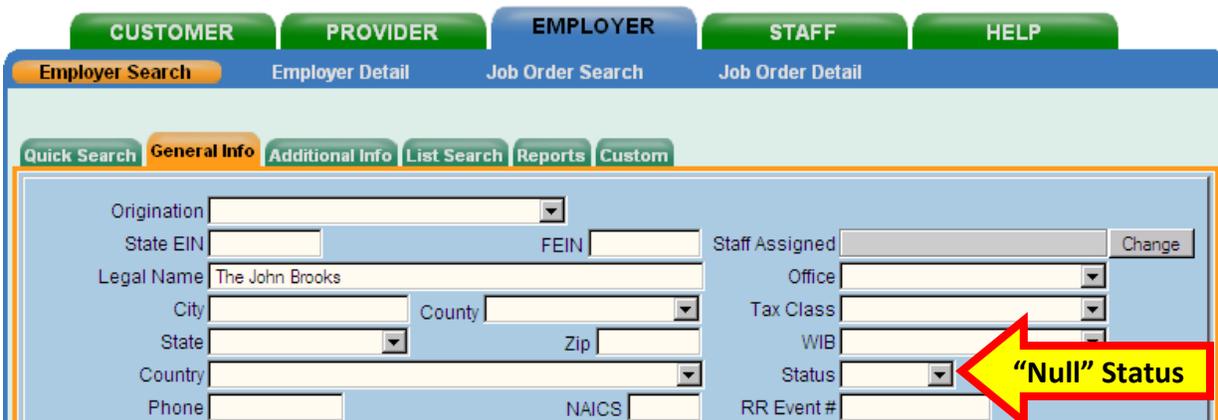
1. The Employer information must be data entered into OSOS
2. The Employer must be data entered as a Provider
3. The Provider must then have specific service or multiple services called Offering(s) data entered into OSOS.

## OSOS DATA ENTRY

### BUSINESS DATA ENTRY (EMPLOYER ACTIVITIES)

First, search to see if an employer is already entered into OSOS by navigating to the **Employer** module, **Employer Search** window, and **General Info** tab. The search automatically defaults to **Active** employers. Change the **Active** 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 John Brooks” or without the word such as “John Brooks”.



The screenshot shows the OSOS Employer Search window with the 'EMPLOYER' module selected. The 'Employer Search' window is open, and the 'General Info' tab is active. The 'Legal Name' field contains 'The John Brooks'. The 'Status' dropdown menu is highlighted with a red arrow and labeled 'Null Status'.

Click the **Search** button.



The screenshot shows the OSOS search bar with the 'Search' button highlighted by a red arrow.



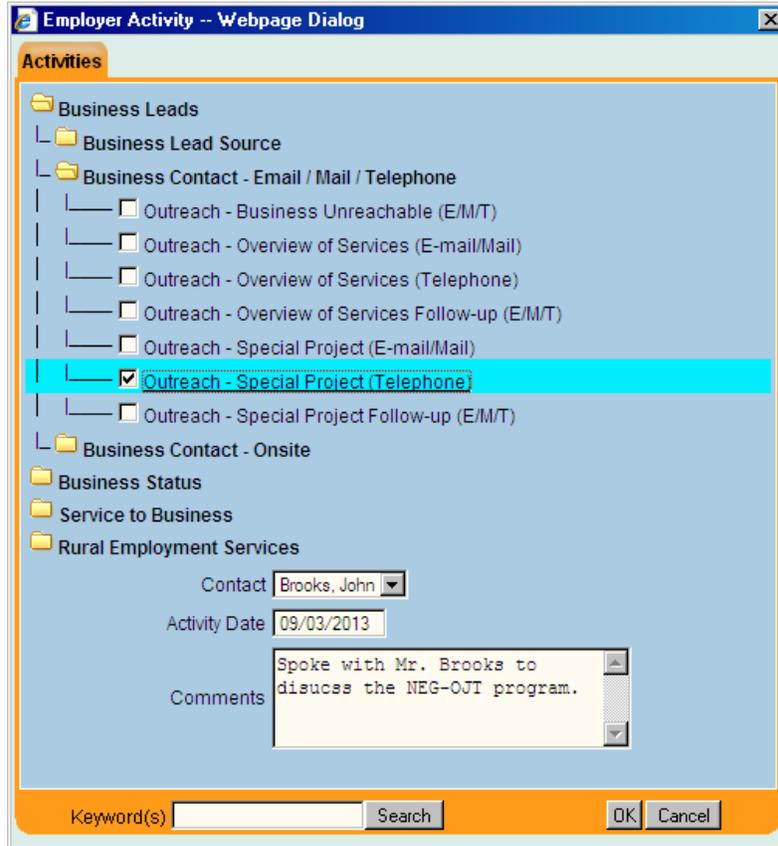
Make sure the employer information throughout the **General Info**, **Additional Info**, and the **Contact Info** tabs is complete and current.

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

The screenshot displays the 'Employer Detail' page for 'The John Brooks Institute' (ID: NY010041761). The page is divided into several sections:

- Navigation:** Top tabs include CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Sub-tabs include Employer Search, Employer Detail (selected), Job Order Search, and Job Order Detail.
- Header:** 'The John Brooks Institute' and 'ID: NY010041761'. A '1 of 1' indicator is present.
- General Info Tab:** Contains fields for Status (Active), Company (The John Brooks Institute), Legal Name (Brooks Incorporated), State EIN, FEIN, Location Suffix, Tax Class, Address (Bldg #12), City (Albany), County (Albany), Phone (555-555-5555), Alt. Phone (555-555-5555), Email, NAICS (111110 - Soybean Farming), Ownership (Private/Corporation), and Create Date (05/30/2013). A checkbox for 'Desired Employers List' is also present.
- Additional Info Tab:** Contains fields for Origination (AOSOS - Mediated), WIB (Albany/Rensselaer/Schenectady County), Agency (Capital District WAE), Office (Albany Career Central), Staff Assigned (Rotman, Neil), and Emp. Rel. Rep. (Pillittere, Ruth). 'Change' buttons are available for Agency, Office, Staff Assigned, and Emp. Rel. Rep.
- Footer:** Buttons for Save, Activity (highlighted with a red arrow), 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 Activity -- Webpage Dialog**

**Activities**

- Business Leads
  - Business Lead Source
  - Business Contact - Email / Mail / Telephone
    - Outreach - Business Unreachable (E/M/T)
    - Outreach - Overview of Services (E-mail/Mail)
    - Outreach - Overview of Services (Telephone)
    - Outreach - Overview of Services Follow-up (E/M/T)
    - Outreach - Special Project (E-mail/Mail)
    - Outreach - Special Project (Telephone)
    - Outreach - Special Project Follow-up (E/M/T)
  - Business Contact - Onsite
- Business Status
- Service to Business
- Rural Employment Services

Contact: Brooks, John

Activity Date: 09/03/2013

Comments: Spoke with Mr. Brooks to discuss the NEG-OJT program.

Keyword(s) Search OK Cancel

## PROVIDER, SERVICES AND OFFERING

This information must be entered in sequential order: **Provider**, **Provider Service**, and **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 OSOS.

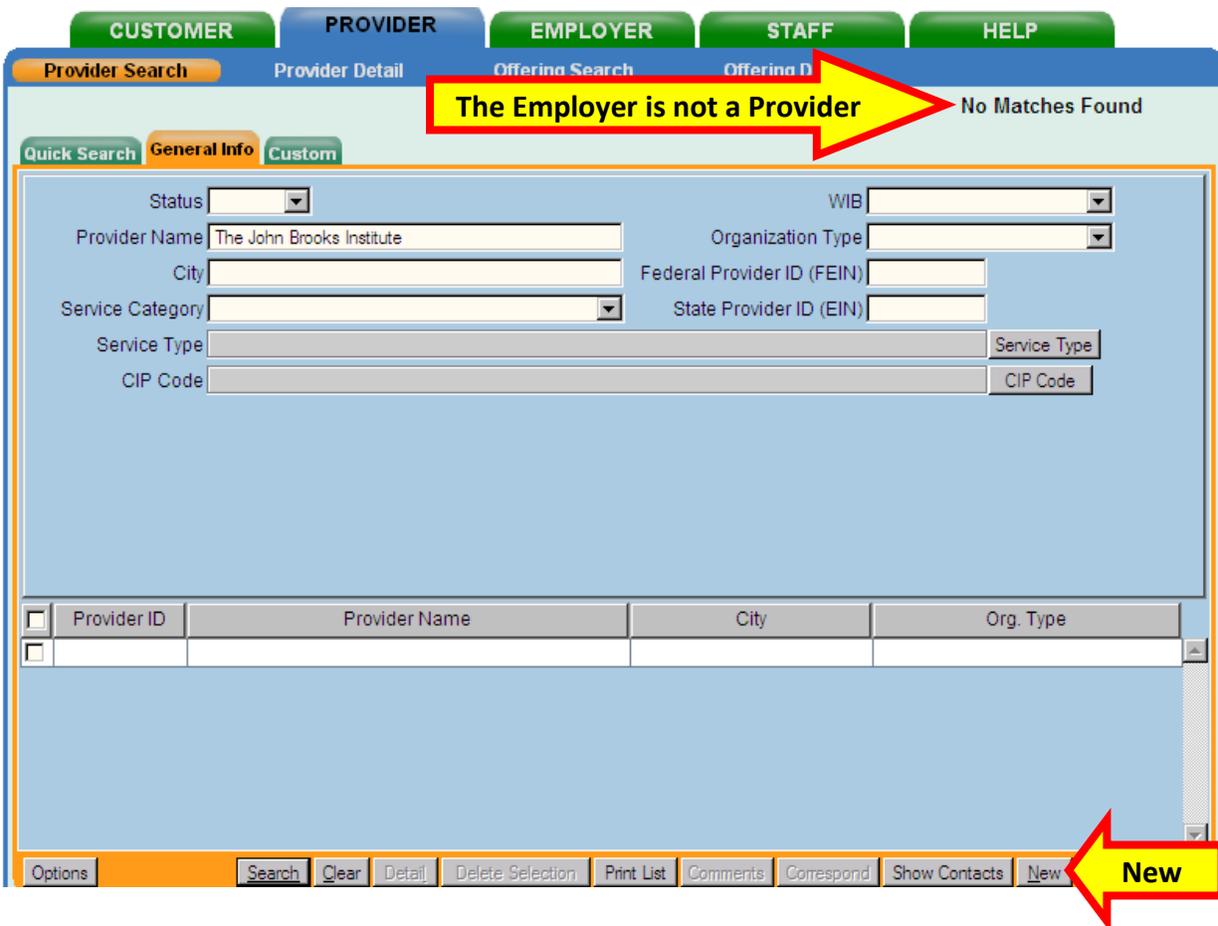
### PROVIDER

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 **Provider** module; **Provider Search** window; **General Info** tab. A search may be customized in numerous ways such as selecting the LWIB name from the drop down list and is similar to what was described in the previous **Employer** section. Be sure to change the **Status** to the null setting, which is the blank space.

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

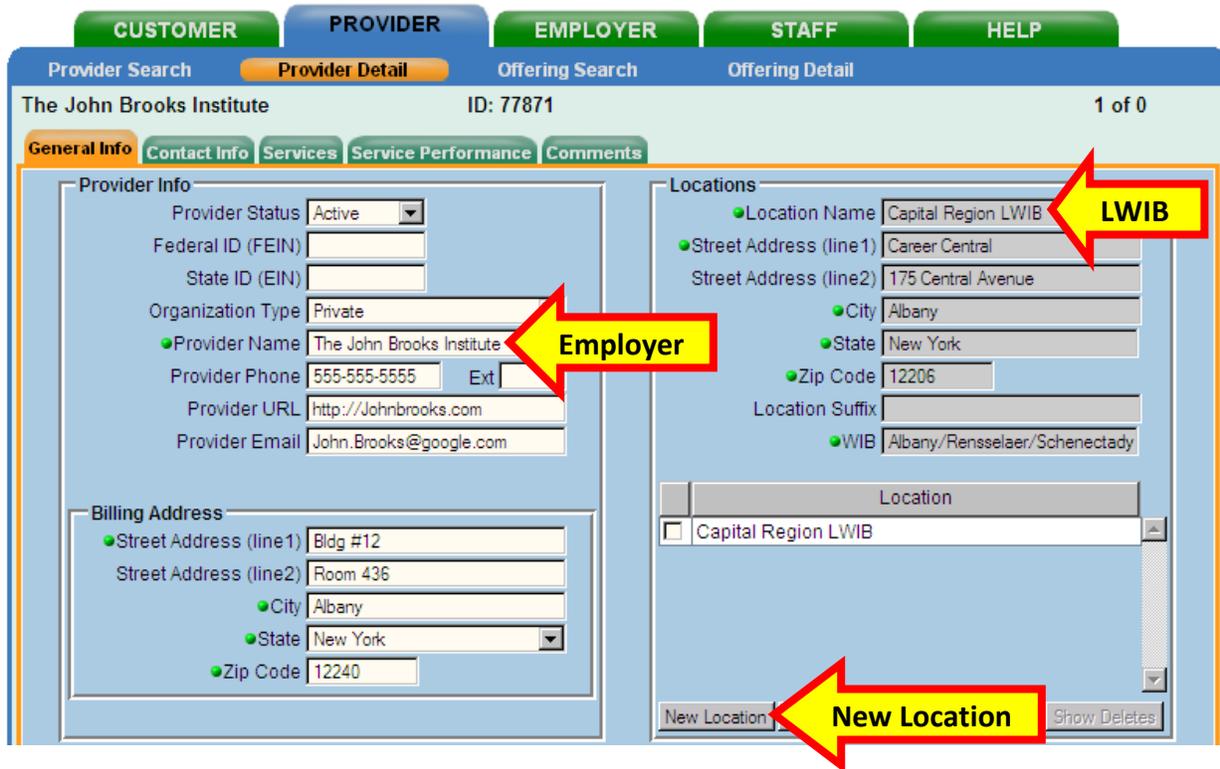


The screenshot shows the OSOS interface with the following elements:

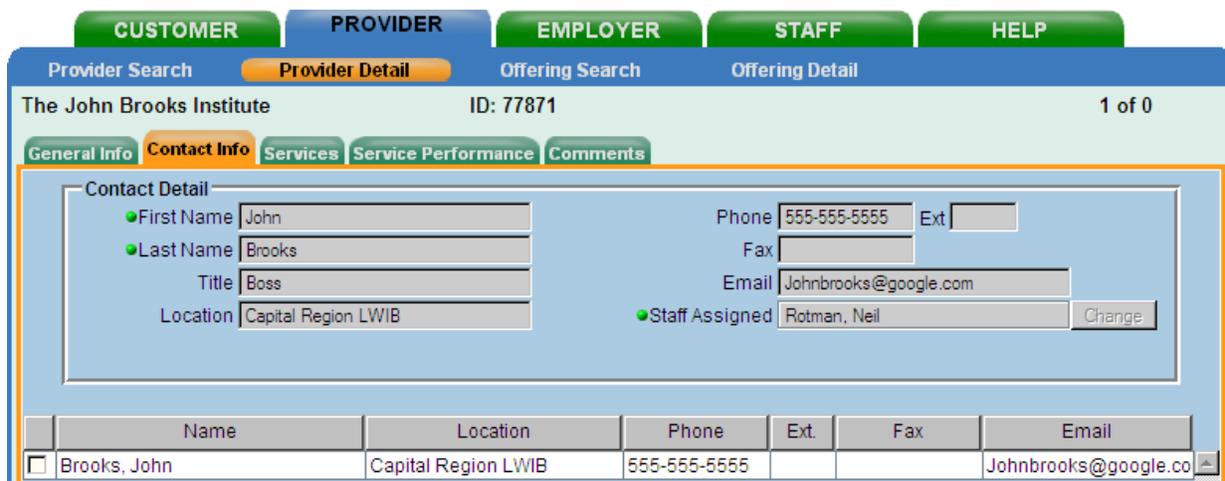
- Navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, HELP.
- Sub-tabs: Provider Search (selected), Provider Detail, Offering Search, Offering D.
- Search results: No Matches Found.
- Form fields for General Info:
  - Status: [Dropdown]
  - Provider Name: The John Brooks Institute
  - City: [Text Box]
  - Service Category: [Dropdown]
  - Service Type: [Text Box]
  - CIP Code: [Text Box]
  - WIB: [Dropdown]
  - Organization Type: [Dropdown]
  - Federal Provider ID (FEIN): [Text Box]
  - State Provider ID (EIN): [Text Box]
  - Service Type: [Text Box]
  - CIP Code: [Text Box]
- Table with columns: Provider ID, Provider Name, City, Org. Type.
- Buttons at the bottom: Options, Search, Clear, Detail, Delete Selection, Print List, Comments, Correspond, Show Contacts, New (highlighted with a yellow arrow).

Complete and update all information in the **Provider Detail General Info** tab.

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.



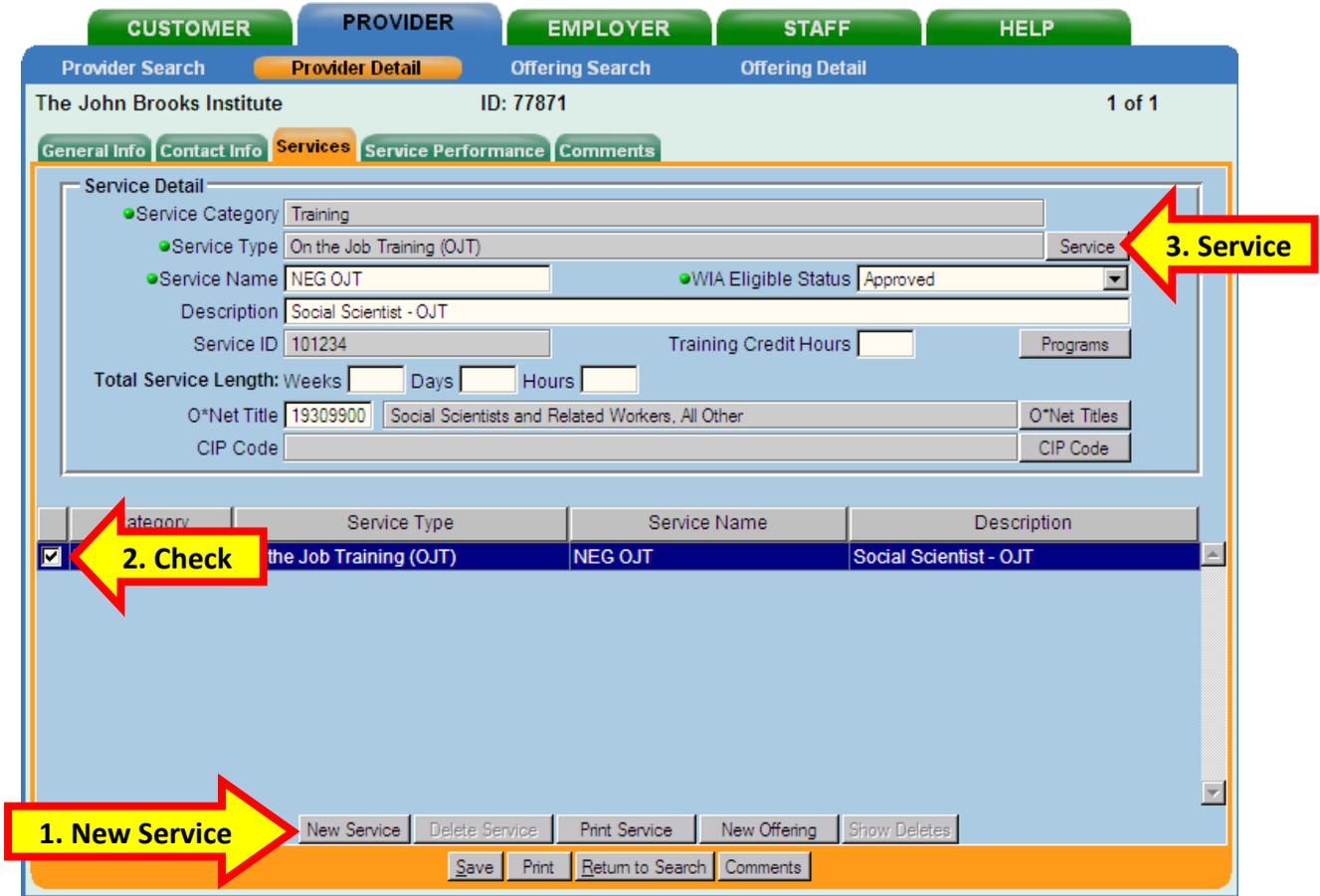
Complete and update all information in the **Provider Detail Contact Info** tab.



Name	Location	Phone	Ext.	Fax	Email
<input type="checkbox"/> Brooks, John	Capital Region LWIB	555-555-5555			Johnbrooks@google.co

Complete and update all information in the **Provider Detail Services** tab. A **provider service** is required before creating the **offering**. If the service does not already exist, then:

1. Click the **New Service** button.
2. Place a check mark in the box next to the newly created service line.
3. Click the **Service** button to access the **Service Category/Type Selector** Webpage Dialog screen.



The screenshot shows the OSOS interface for 'The John Brooks Institute' (ID: 77871). The 'Services' tab is active, displaying a 'Service Detail' form and a table of services. Three red arrows with yellow text boxes point to specific elements:

- 1. New Service:** Points to the 'New Service' button at the bottom of the interface.
- 2. Check:** Points to a checked checkbox in the first column of the service table.
- 3. Service:** Points to the 'Service' button located next to the 'Service Type' field in the 'Service Detail' form.

**Service Detail Form Fields:**

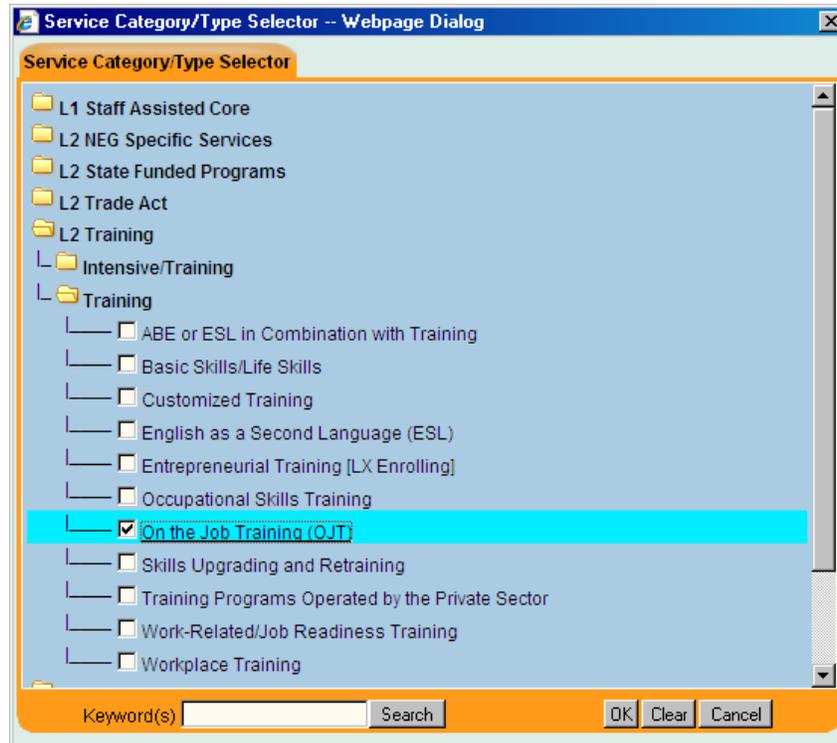
- Service Category: Training
- Service Type: On the Job Training (OJT) **Service**
- Service Name: NEG OJT **WIA Eligible Status:** Approved
- Description: Social Scientist - OJT
- Service ID: 101234 **Training Credit Hours:** [ ] **Programs:** [ ]
- Total Service Length: Weeks [ ] Days [ ] Hours [ ]
- O\*Net Title: 19309900 Social Scientists and Related Workers, All Other **O\*Net Titles:** [ ]
- CIP Code: [ ] **CIP Code:** [ ]

Category	Service Type	Service Name	Description
<input checked="" type="checkbox"/>	On the Job Training (OJT)	NEG OJT	Social Scientist - OJT

**Buttons:** New Service, Delete Service, Print Service, New Offering, Show Deletes, Save, Print, Return to Search, Comments

Select **Service Category** folder entitled **Training**.

Place a check mark next to the **Service Type** entitled **On the Job Training (OJT)**.



Click the **OK** button.

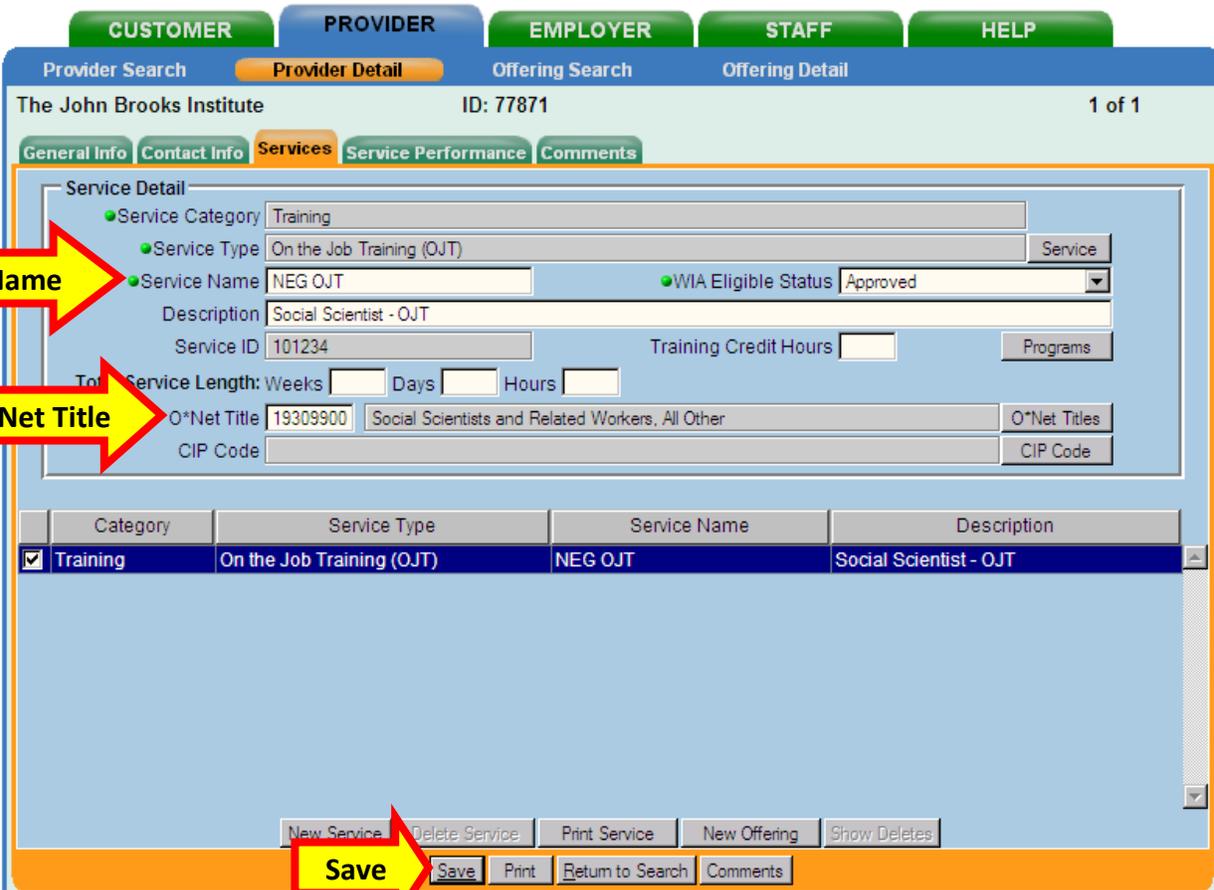
The **Service Name** is **NEG OJT**.

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

For example: *Social Scientists – OJT*.

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

Click the **Save** button.



The screenshot shows the 'Provider Detail' page for 'The John Brooks Institute' (ID: 77871). The 'Services' tab is active, displaying the following details:

- Service Category: Training
- Service Type: On the Job Training (OJT)
- Service Name: NEG OJT
- Description: Social Scientist - OJT
- Service ID: 101234
- WIA Eligible Status: Approved
- O\*Net Title: 19309900 Social Scientists and Related Workers, All Other

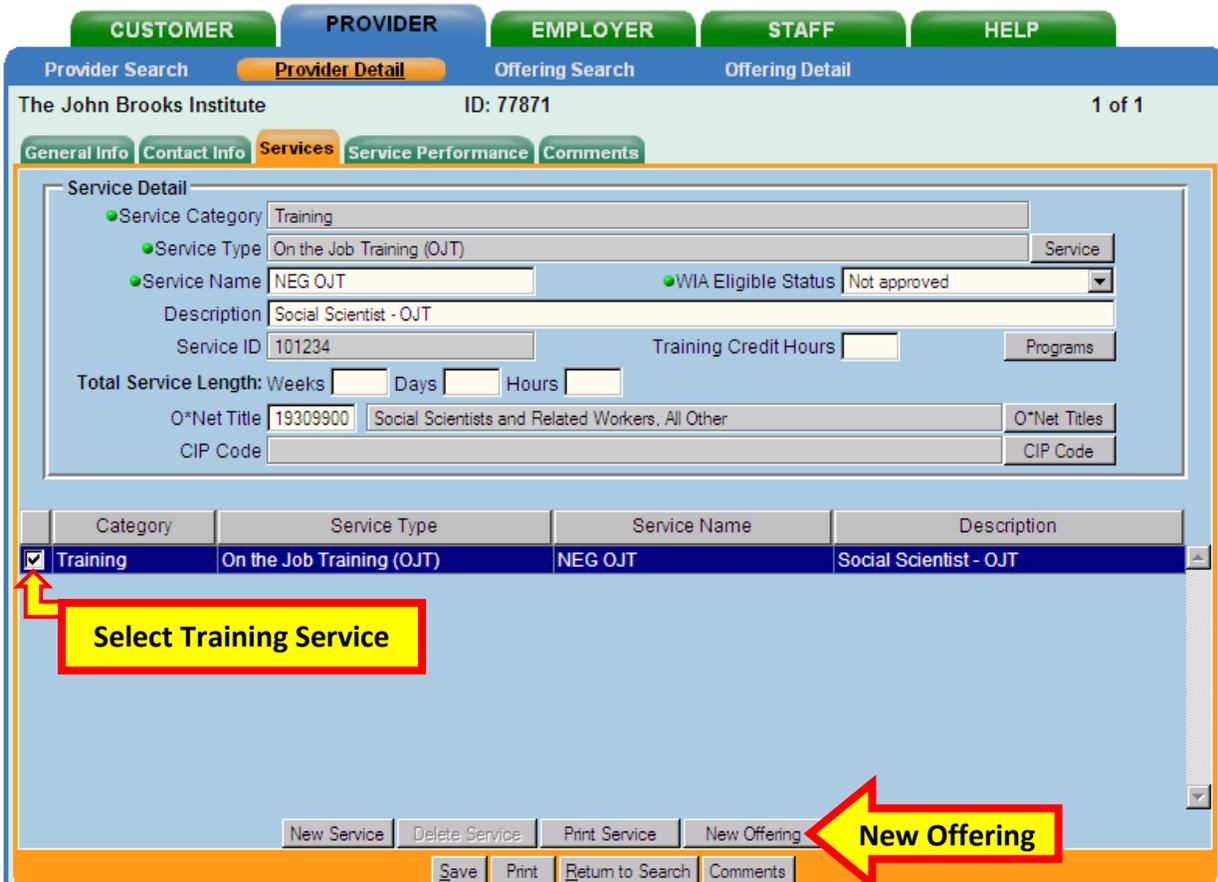
Annotations with red arrows point to the 'Service Name' field, the 'O\*Net Title' field, and the 'Save' button at the bottom of the form.

Category	Service Type	Service Name	Description	
<input checked="" type="checkbox"/>	Training	On the Job Training (OJT)	NEG OJT	Social Scientist - OJT

## OFFERING

Check the box to highlight the appropriate NEG training service and open access to the **New Offering** button.

Click the **New Offering** button.



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

The John Brooks Institute ID: 77871 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 OJT  Not approved
- Description: Social Scientist - OJT
- Service ID: 101234 Training Credit Hours:
- Total Service Length: Weeks:  Days:  Hours:
- O\*Net Title: 19309900 Social Scientists and Related Workers, All Other
- CIP Code:

Category	Service Type	Service Name	Description
<input checked="" type="checkbox"/> Training	On the Job Training (OJT)	NEG OJT	Social Scientist - 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. Do not check the **Start Date, End Date, Start Time, End Time**, any other days of the week, or enter any number into the **Total Seats** or **Available Seats** data fields.

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

Enter *NEG OJT* in the **Description**.

Click the **Save Single** button.

The screenshot shows the 'Offering Detail' page for 'NEG - OJT'. The 'Provider Info' section includes: Provider Name (The John Brooks Institute), Service Category (Training), Service Type (On the Job Training (OJT)), and Service Description (Social Scientist - OJT). The 'Location' section includes: Location (Capital Region LWIB), Address (Career Central, 175 Central Avenue), City (Albany), State (New York), and Zip (12206). The 'Schedule' section includes: Start Date, End Date, Start Time, End Time, and checkboxes for days of the week (Sun, Mon, Thu, Fri, Sat). The 'Monday' checkbox is checked. The 'Additional Info' section includes: Cost (\$ 1.00), Total Seats, Available Seats, and Description (NEG OJT). The 'Save Single' button is highlighted with a red arrow.

If you have additional concerns regarding data entry for a new provider and/or offering, please refer to the **Desk Guide for Provider Module Data Entry and Maintenance** found at: <http://labor.ny.gov/workforcenypartners/osos/osos-desk-guide-provider-module.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)

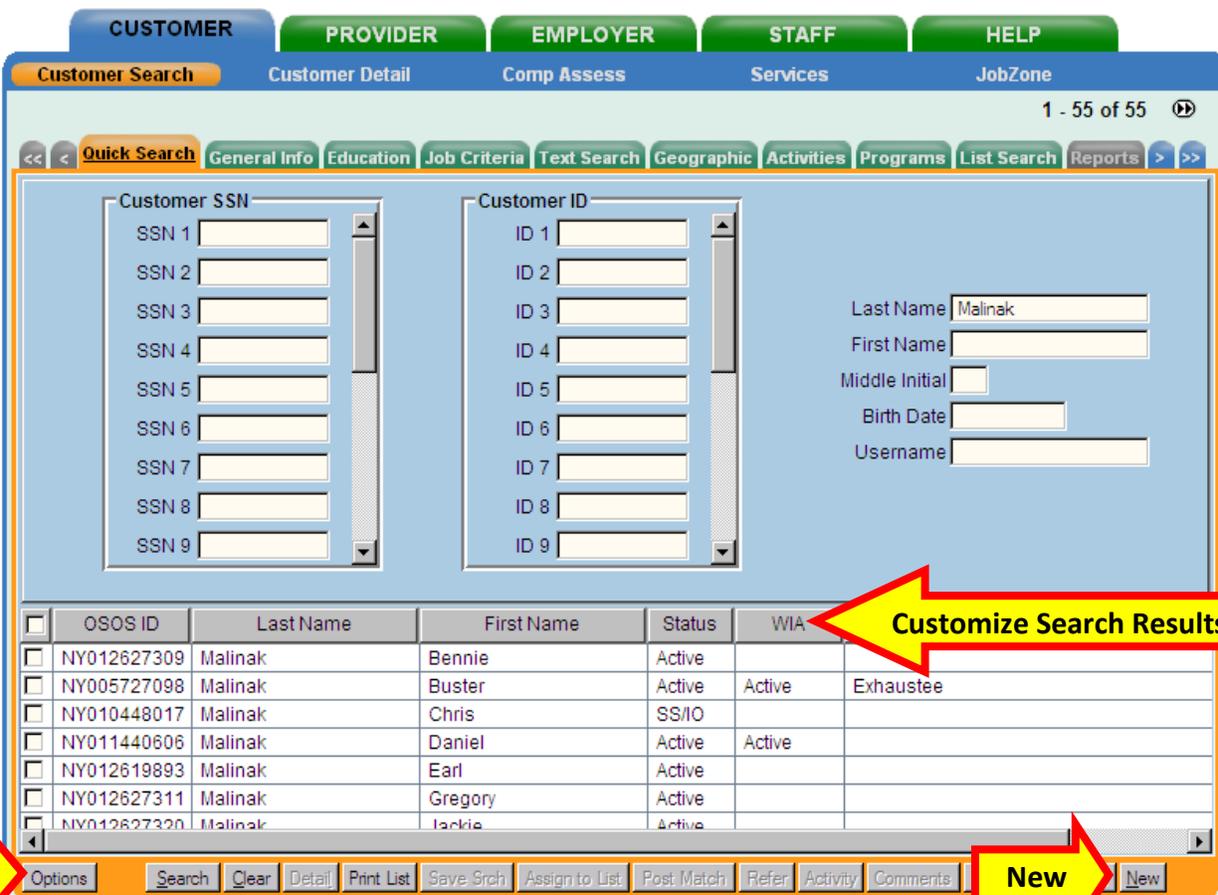
## PARTICIPANT DATA ENTRY

### CUSTOMER SEARCH WINDOW

Search for the customer using either the social security number, customer ID number that begins with "NY0", or the customer's name (see search instructions in the Desk Guide for the Customer Module of OSOS).

It is possible to specify what information is desired in the search results by clicking the **Options** button.

If no customer record is found, then click the **New** button and create the customer record.



<input type="checkbox"/>	OSOS ID	Last Name	First Name	Status	WIA	
<input type="checkbox"/>	NY012627309	Malinak	Bennie	Active		
<input type="checkbox"/>	NY005727098	Malinak	Buster	Active	Active	Exhaustee
<input type="checkbox"/>	NY010448017	Malinak	Chris	SS/IO		
<input type="checkbox"/>	NY011440606	Malinak	Daniel	Active	Active	
<input type="checkbox"/>	NY012619893	Malinak	Earl	Active		
<input type="checkbox"/>	NY012627311	Malinak	Gregory	Active		
<input type="checkbox"/>	NY012627320	Malinak	Jackie	Active		

If creating a new customer record, refer to the data entry resource guides at <http://labor.ny.gov/workforcenypartners/osos.shtm>.



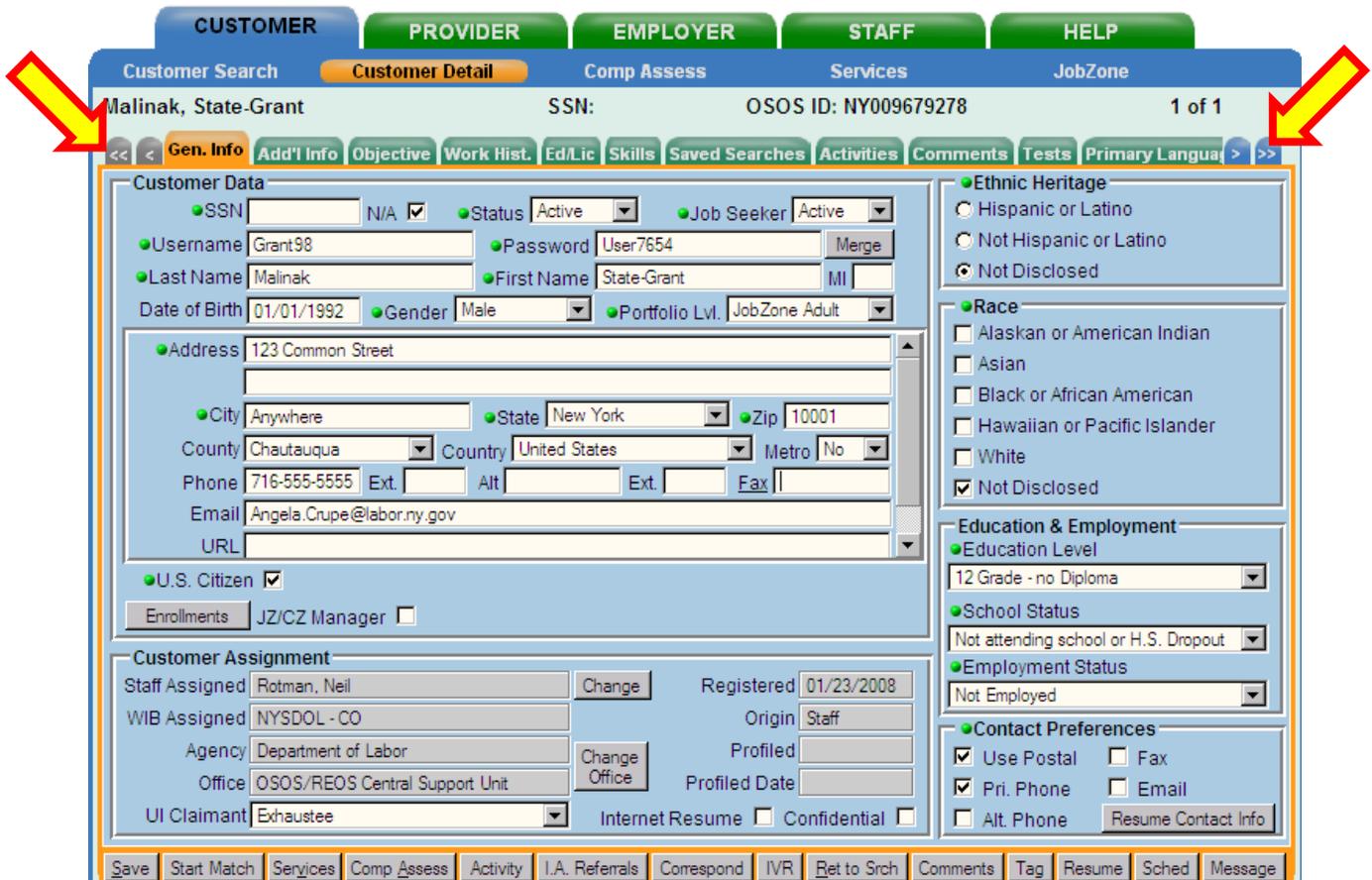
*Remember to adhere to data Element Validation and WIA eligibility requirements.*

## CUSTOMER DETAIL WINDOW



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

Click the single arrows to navigate to additional tabs to the right or left of the current display.



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

Customer Search | **Customer Detail** | Comp Assess | Services | JobZone

Malinak, State-Grant | SSN: | OSOS ID: NY009679278 | 1 of 1

Gen. Info | Add'l Info | Objective | Work Hist. | Ed/Lic | Skills | Saved Searches | Activities | Comments | Tests | Primary Language

**Customer Data**

- SSN: N/A  Status: Active Job Seeker: Active
- Username: Grant98 Password: User7654 Merge
- Last Name: Malinak First Name: State-Grant MI
- Date of Birth: 01/01/1992 Gender: Male Portfolio Lvl.: JobZone Adult
- Address: 123 Common Street
- City: Anywhere State: New York Zip: 10001
- County: Chautauqua Country: United States Metro: No
- Phone: 716-555-5555 Ext. Alt. Ext. Fax
- Email: Angela.Crupe@labor.ny.gov
- URL
- U.S. Citizen:
- Enrollments: JZ/CZ Manager

**Customer Assignment**

- Staff Assigned: Rotman, Neil Change Registered: 01/23/2008
- WIB Assigned: NYSDOL - CO Origin: Staff
- Agency: Department of Labor Change Office Profiled:
- Office: OSOS/REOS Central Support Unit Profiled Date:
- UI Claimant: Exhaustee Internet Resume: Confidential:

**Ethnic Heritage**

- Hispanic or Latino
- Not Hispanic or Latino
- Not Disclosed

**Race**

- Alaskan or American Indian
- Asian
- Black or African American
- Hawaiian or Pacific Islander
- White
- Not Disclosed

**Education & Employment**

- Education Level: 12 Grade - no Diploma
- School Status: Not attending school or H.S. Dropout
- Employment Status: Not Employed

**Contact Preferences**

- Use Postal  Fax
- Pri. Phone  Email
- Alt. Phone Resume Contact Info

Save | Start Match | Services | Comp Assess | Activity | I.A. Referrals | Correspond | IVR | Ret to Srch | Comments | Tag | Resume | Sched | Message

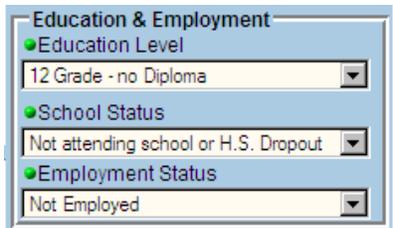
Trainees must be unemployed immediately prior to the OJT service start date for 27 weeks or more and qualify as **Dislocated** Workers after January 1, 2008 and before January 1, 2013 or unemployed 20 weeks or more during or after January 1, 2013.

The 20 or more weeks of unemployment since dislocation do not necessarily need to be consecutive. If a customer has worked in a "Stop gap" employment situation after dislocation, the customer may still be eligible for the OJT NEG program. Consideration of OJT NEG customers who have had "Stop gap" employment situations should be reviewed for approval on a case by case basis. It is highly recommended staff contact the OJT NEG help desk:

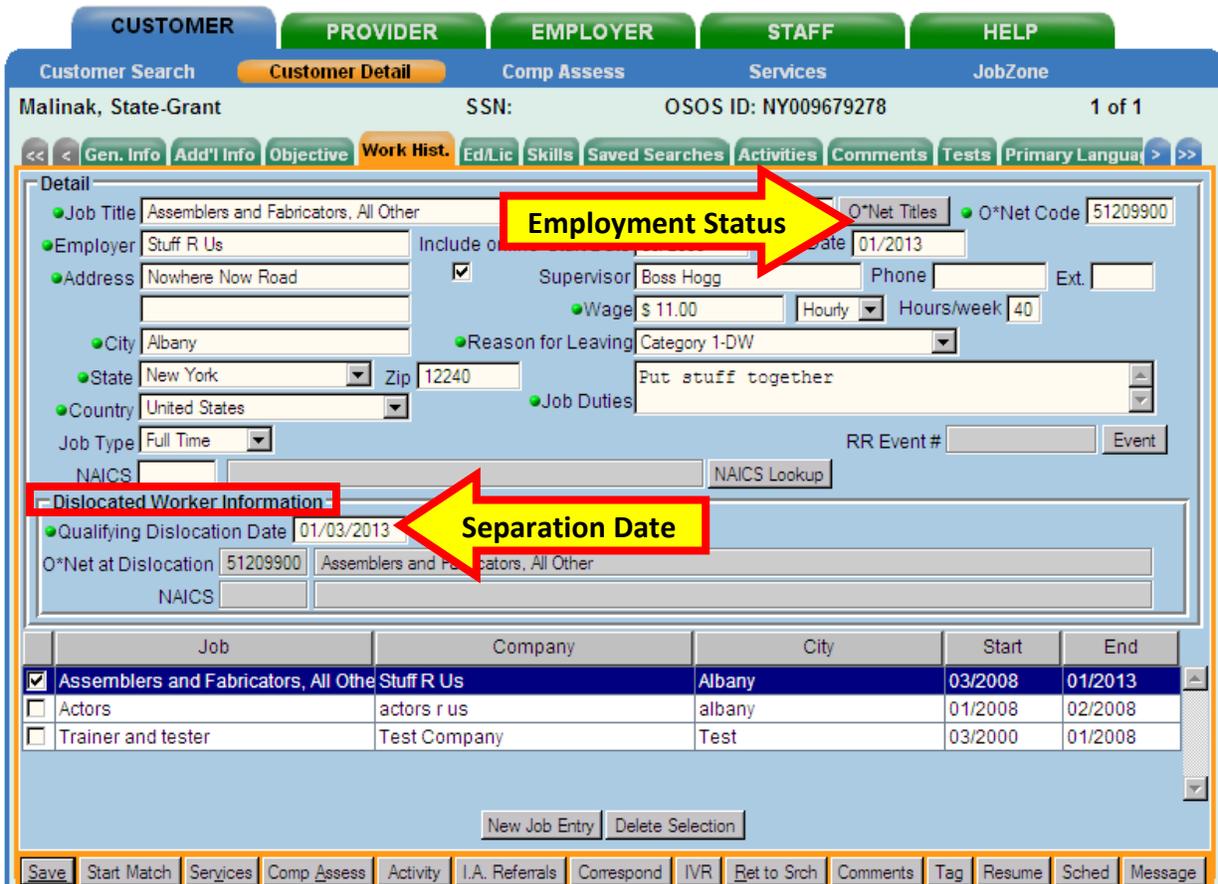
[OJT-NEG@labor.ny.gov](mailto:OJT-NEG@labor.ny.gov)

to discuss the candidate's employment details, and ensure the candidate's eligibility for an OJT/NEG training.

Check the **Employment Status** in the **Gen. Info** tab to ensure that the participant is unemployed prior to the start of training. This entry is critical if a new enrollment is being created.




*Ensure that the customer's work history is updated and that the separation date is January 1, 2008 or later and that the participant has been unemployed for the required number of weeks. The Dislocated Worker Information section must be completed.*



Customer Search | **Customer Detail** | Comp Assess | Services | JobZone

Malinak, State-Grant | SSN: | OSOS ID: NY009679278 | 1 of 1

Gen. Info | Add'l Info | Objective | **Work Hist.** | Ed/Lic | Skills | Saved Searches | Activities | Comments | Tests | Primary Language

**Employment Status**

**Dislocated Worker Information**

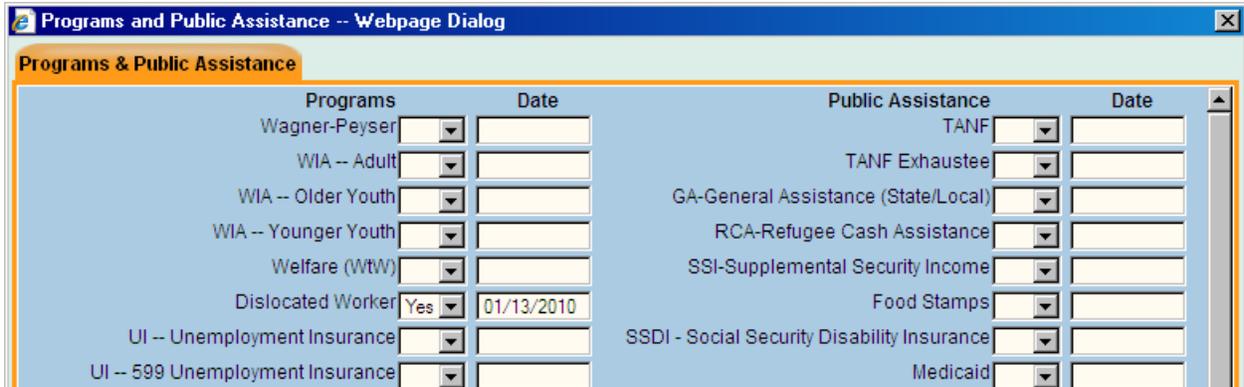
**Separation Date**

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Assemblers and Fabricators, All Other	Stuff R Us	Albany	03/2008	01/2013
<input type="checkbox"/> Actors	actors r us	albany	01/2008	02/2008
<input type="checkbox"/> Trainer and tester	Test Company	Test	03/2000	01/2008

New Job Entry | Delete Selection

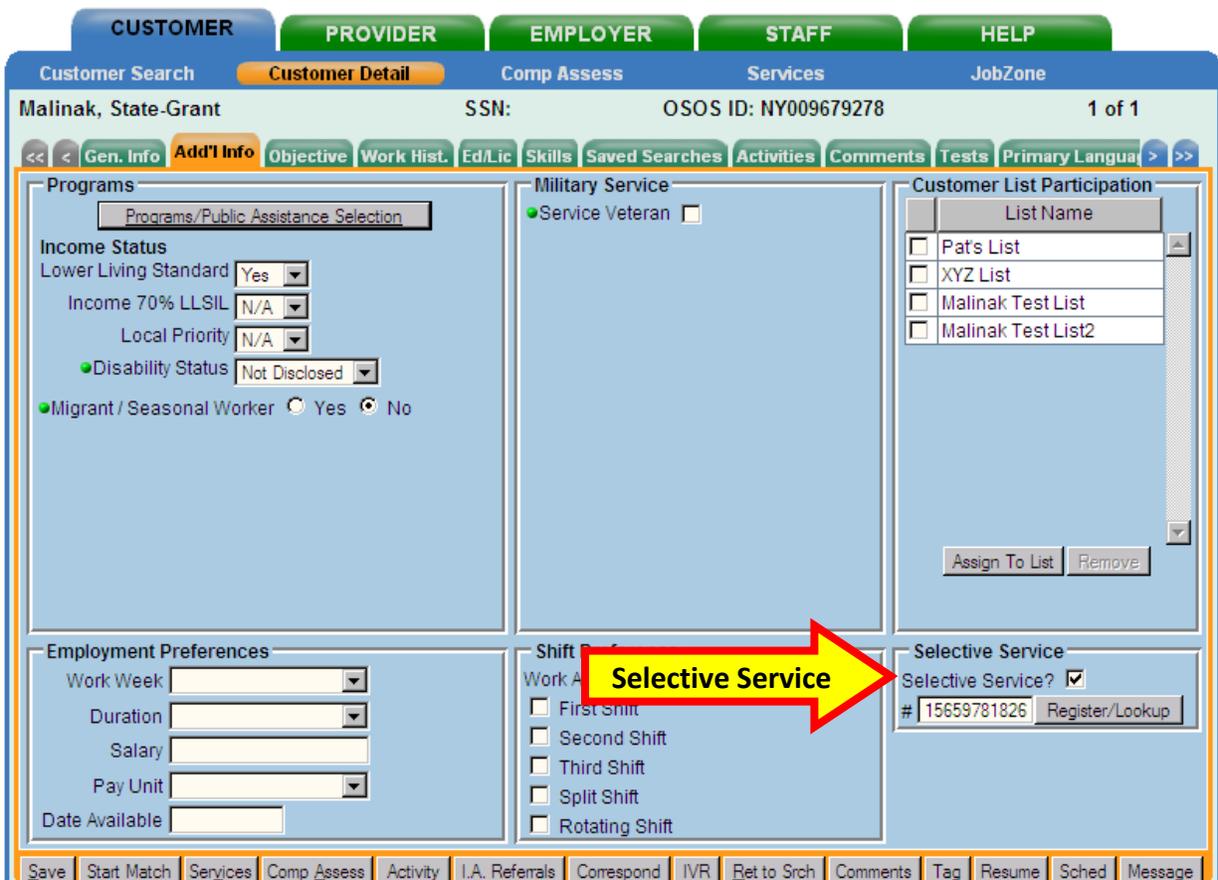
Save | Start Match | Services | Comp Assess | Activity | I.A. Referrals | Correspond | IVR | Ret to Srch | Comments | Tag | Resume | Sched | Message

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.



Programs	Date	Public Assistance	Date
Wagner-Peyser		TANF	
WIA -- Adult		TANF Exhaustee	
WIA -- Older Youth		GA-General Assistance (State/Local)	
WIA -- Younger Youth		RCA-Refugee Cash Assistance	
Welfare (WtW)		SSI-Supplemental Security Income	
Dislocated Worker	01/13/2010	Food Stamps	
UI -- Unemployment Insurance		SSDI - Social Security Disability Insurance	
UI -- 599 Unemployment Insurance		Medicaid	

**Selective Service** is required for every male that is 18 through 25 years of age born subsequent to 12/31/1959. The **Selective Service** check box must be selected where appropriate.



Customer: Malinak, State-Grant | SSN: [redacted] | OSOS ID: NY009679278 | 1 of 1

Gen. Info | **Add'l Info** | Objective | Work Hist. | Ed/Lic | Skills | Saved Searches | Activities | Comments | Tests | Primary Language

**Programs**  
 Programs/Public Assistance Selection  
 Income Status  
 Lower Living Standard: Yes  
 Income 70% LLSIL: N/A  
 Local Priority: N/A  
 Disability Status: Not Disclosed  
 Migrant / Seasonal Worker: No

**Military Service**  
 Service Veteran:

**Customer List Participation**  
 List Name  
 Pat's List  
 XYZ List  
 Malinak Test List  
 Malinak Test List2  
 Assign To List | Remove

**Employment Preferences**  
 Work Week: [dropdown]  
 Duration: [dropdown]  
 Salary: [dropdown]  
 Pay Unit: [dropdown]  
 Date Available: [text]

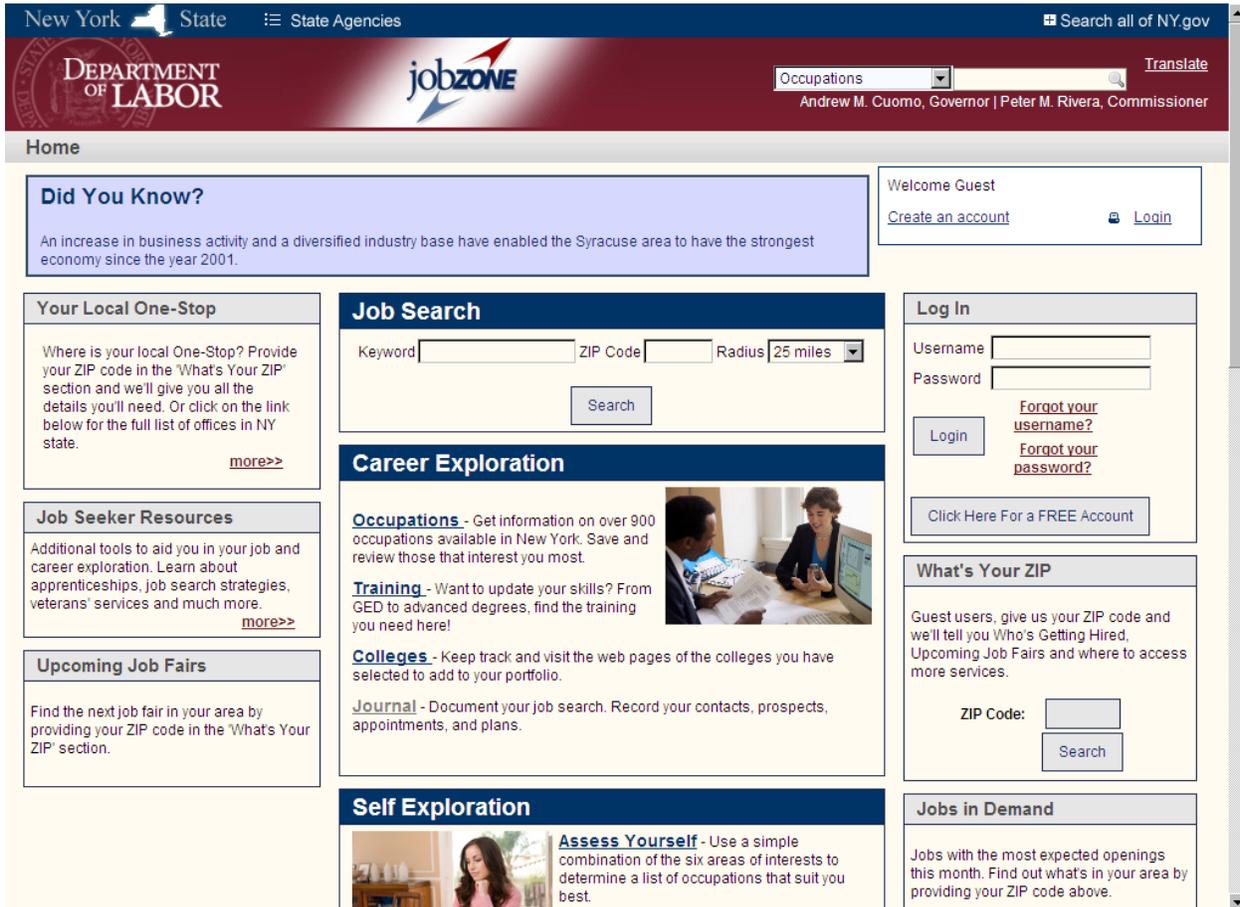
**Shift Preferences**  
 Work A: [dropdown]  
 First Shift  
 Second Shift  
 Third Shift  
 Split Shift  
 Rotating Shift

**Selective Service**  
 Selective Service?:   
 # 15659781826 | Register/Lookup

Save | Start Match | Services | Comp Assess | Activity | I.A. Referrals | Correspond | IVR | Ret to Srch | Comments | Tag | Resume | Sched | Message

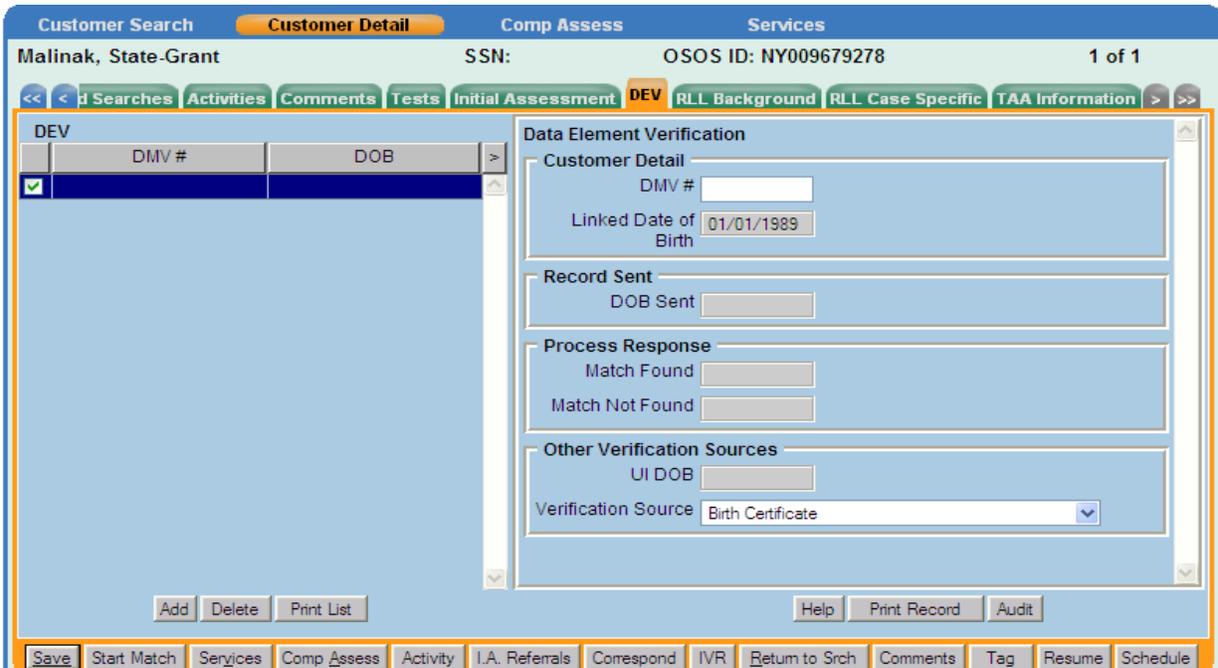


*Potential Trainees must use JobZone to develop a list of skills:*  
<https://www.jobzone.ny.gov/views/jobzone/guest.jsf>



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 must be completed. Refer to the user guide at <http://labor.ny.gov/workforcenypartners/osos/osos-guide-dob.pdf>.



Customer Search | **Customer Detail** | Comp Assess | Services

Malinak, State-Grant | SSN: | OSOS ID: NY009679278 | 1 of 1

<< | < | Searches | Activities | Comments | Tests | Initial Assessment | **DEV** | RLL Background | RLL Case Specific | TAA Information | > | >>

DEV	DMV #	DOB
<input checked="" type="checkbox"/>		

**Data Element Verification**

Customer Detail  
DMV #   
Linked Date of Birth 01/01/1989

Record Sent  
DOB Sent

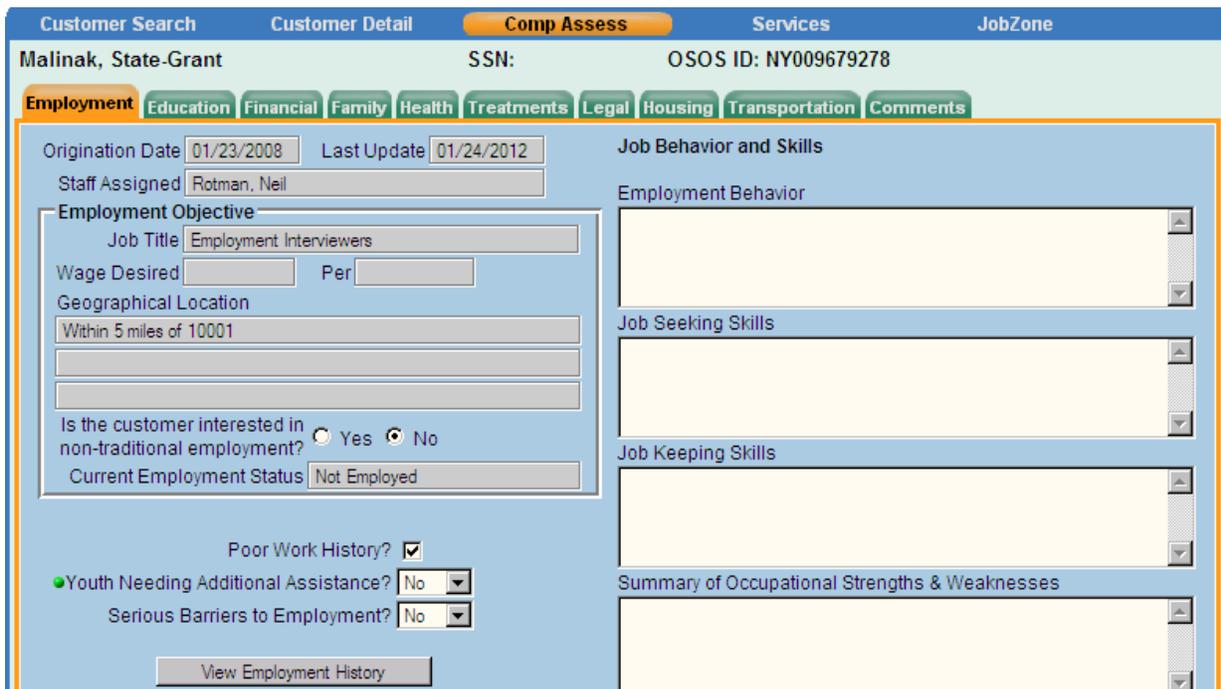
Process Response  
Match Found   
Match Not Found

Other Verification Sources  
UI DOB   
Verification Source Birth Certificate

Add | Delete | Print List | Help | Print Record | Audit

Save | Start Match | Services | Comp Assess | Activity | I.A. Referrals | Correspond | IVR | Return to Srch | Comments | Tag | Resume | Schedule

Be sure to update the Comprehensive Assessment tabs where appropriate.



Customer Search | Customer Detail | **Comp Assess** | Services | JobZone

Malinak, State-Grant | SSN: | OSOS ID: NY009679278

**Employment** | Education | Financial | Family | Health | Treatments | Legal | Housing | Transportation | Comments

Origination Date 01/23/2008 | Last Update 01/24/2012 | Job Behavior and Skills

Staff Assigned Rotman, Neil | Employment Behavior

**Employment Objective**

Job Title Employment Interviewers

Wage Desired  Per

Geographical Location  
Within 5 miles of 10001

Is the customer interested in non-traditional employment?  Yes  No

Current Employment Status Not Employed

Poor Work History?

Youth Needing Additional Assistance? No

Serious Barriers to Employment? No

View Employment History

Job Seeking Skills

Job Keeping Skills

Summary of Occupational Strengths & Weaknesses

## SERVICES

**An assessment and IEP is required for any OJT and the service must be recorded in OSOS.**

These services should be attached to **Dislocated Worker** funds.



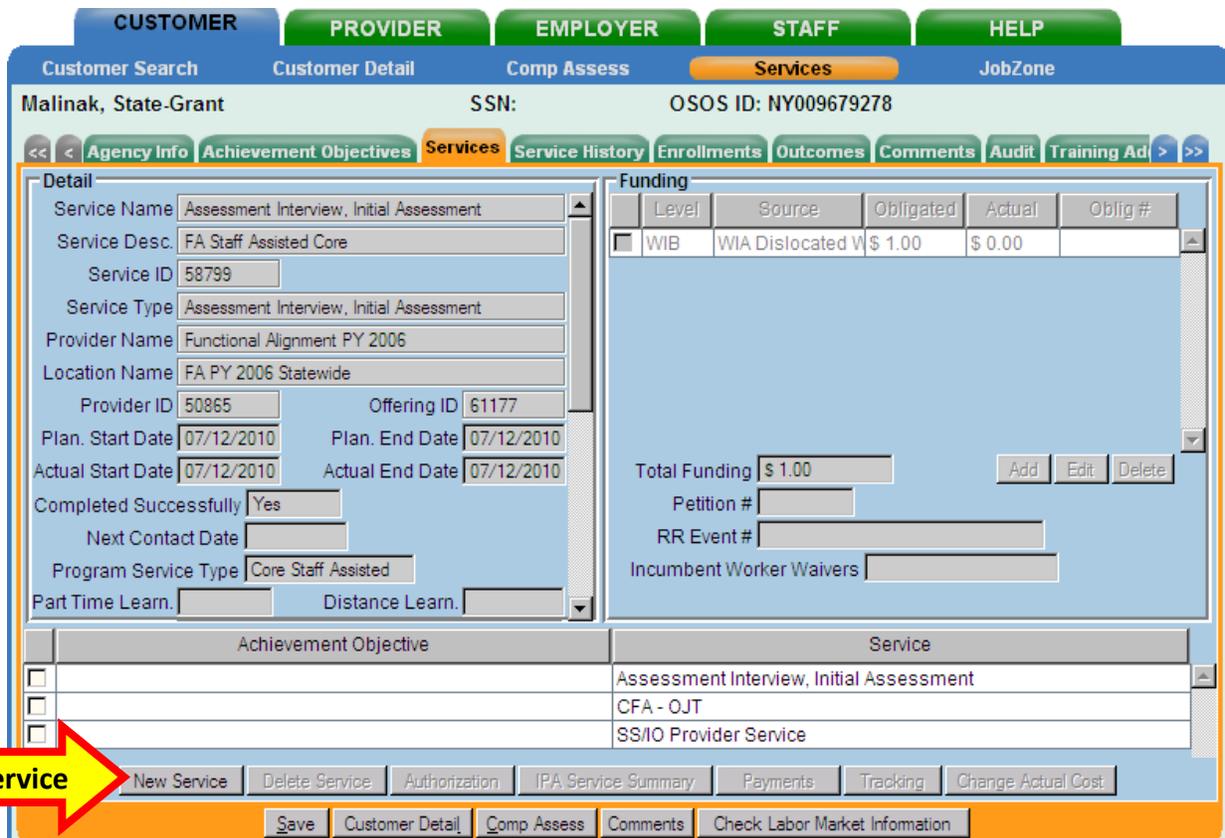
*National Emergency Grant (NEG) funded services must be data entered into OSOS as Level 2 (L2) services in the Services tab and linked to WIB Level NEG OJT funds.*

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

To enter the NEG OJT service, click the **New Service** button.



The screenshot shows the OSOS interface with the 'Services' tab selected. The record is for 'Malinak, State-Grant' with SSN: OSOS ID: NY009679278. The service details include:

- Service Name: Assessment Interview, Initial Assessment
- Service Desc: FA Staff Assisted Core
- Service ID: 58799
- Service Type: Assessment Interview, Initial Assessment
- Provider Name: Functional Alignment PY 2006
- Location Name: FA PY 2006 Statewide
- Provider ID: 50865, Offering ID: 61177
- Plan. Start Date: 07/12/2010, Plan. End Date: 07/12/2010
- Actual Start Date: 07/12/2010, Actual End Date: 07/12/2010
- Completed Successfully: Yes
- Next Contact Date: [empty]
- Program Service Type: Core Staff Assisted
- Part Time Learn.: [empty], Distance Learn.: [empty]

The 'Funding' section shows a table with one entry:

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>	WIB	WIA Dislocated W	\$ 1.00	\$ 0.00

Below the table, there are fields for 'Total Funding' (\$ 1.00), 'Petition #', 'RR Event #', and 'Incumbent Worker Waivers'. At the bottom, a red arrow points to the 'New Service' button in the navigation bar.

OSOS will automatically navigate to the **Offering Search** tab.

Click the **General Info** tab to the right of the **Offering Search** tab.

Select the appropriate **WIB** from the drop-down.

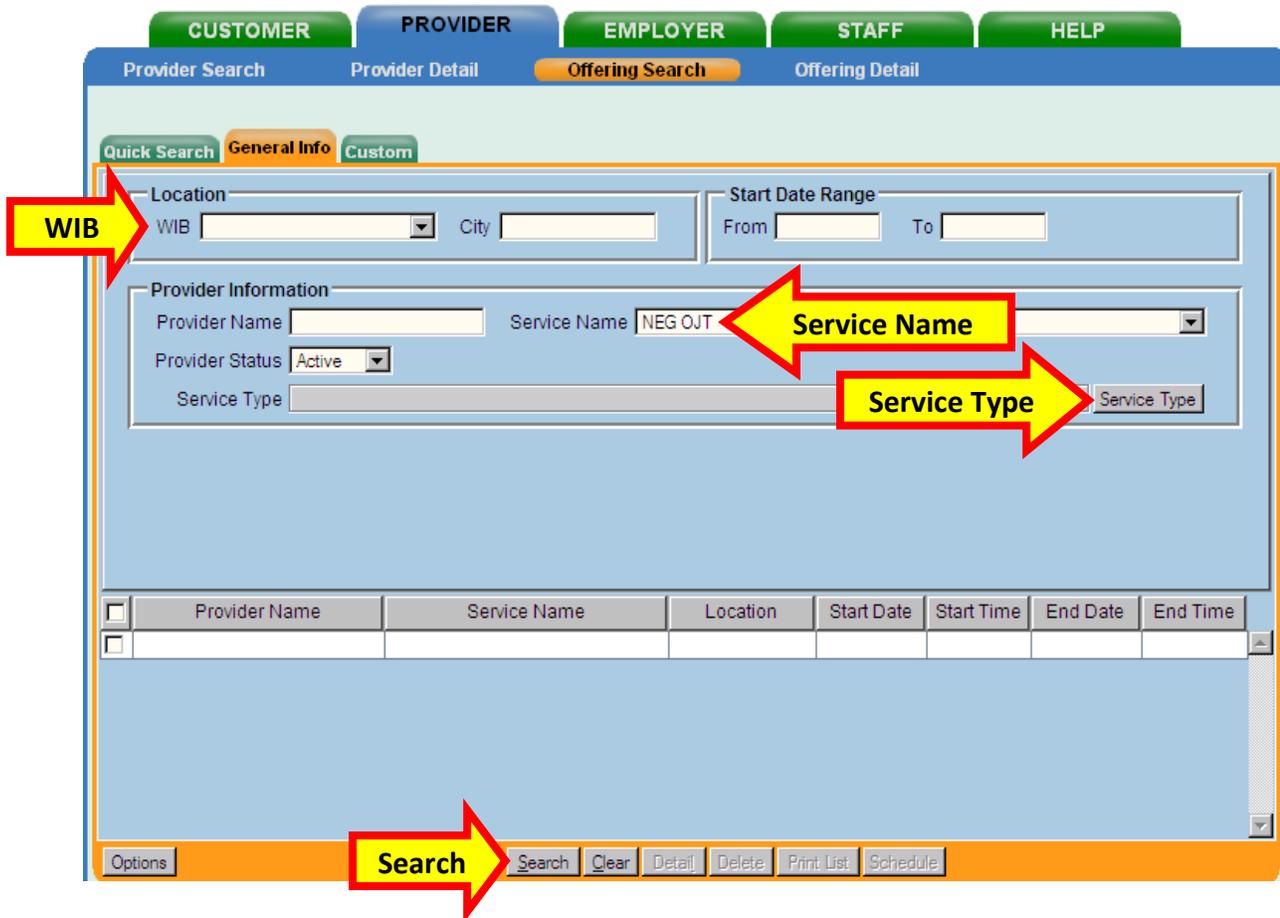
Enter the **Provider Name** if you know it exists. If unknown, then leave blank.

Enter *NEG OJT* as the **Service Name**. This is a change from the *NEG ARRA-OJT Service Name* used with the first months of this program.

Click the **Service Type** button.

- Click the L2 Training folder.
- Click the Training folder.
- Check the box for On the Job Training (OJT).

Click the **Search** button. If not found, then search using only the **Service Name**.

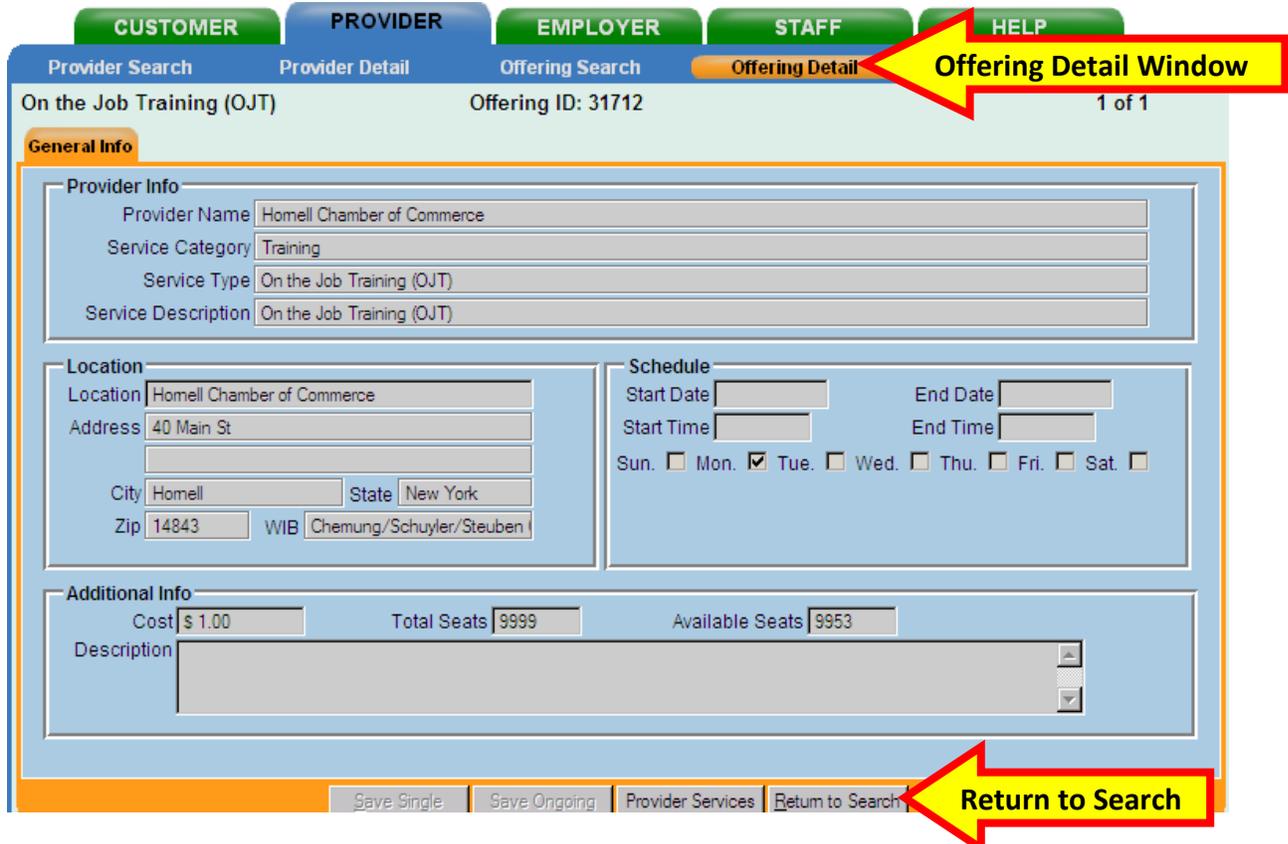


The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (selected), and Offering Detail. The main content area has three sub-tabs: Quick Search, General Info (selected), and Custom. The General Info section contains several input fields: Location (with a WIB dropdown menu), City, Start Date Range (From and To), Provider Name, Service Name (containing 'NEG OJT'), Provider Status (Active), and Service Type. A table below the form has columns for Provider Name, Service Name, Location, Start Date, Start Time, End Date, and End Time. At the bottom, there are buttons for Options, Search, Clear, Detail, Delete, Print List, and Schedule. Red arrows with yellow text labels point to the WIB dropdown, the Service Name field, the Service Type button, and the Search button.

If no offering is located, it may be necessary to create it as described earlier in this guide.

OSOS will navigate to the **Offering Detail** window if there is only a single match to the search. Make sure that this is the correct offering.

Click **Return to Search**.



The screenshot shows the OSOS web interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search, and Offering Detail. The Offering Detail tab is selected and highlighted with a red arrow labeled "Offering Detail Window". The main content area displays "On the Job Training (OJT)" with "Offering ID: 31712" and "1 of 1". The "General Info" tab is active, showing a form with the following sections:

- Provider Info:** Provider Name (Homell Chamber of Commerce), Service Category (Training), Service Type (On the Job Training (OJT)), Service Description (On the Job Training (OJT)).
- Location:** Location (Homell Chamber of Commerce), Address (40 Main St), City (Homell), State (New York), Zip (14843), WIB (Chemung/Schuyler/Steuben).
- Schedule:** Start Date, End Date, Start Time, End Time, and a weekly schedule grid with checkboxes for Sun, Mon, Tue (checked), Wed, Thu, Fri, Sat.
- Additional Info:** Cost (\$ 1.00), Total Seats (9999), Available Seats (9953), and a Description field.

At the bottom of the form, there are buttons: Save Single, Save Ongoing, Provider Services, and Return to Search. A red arrow points to the "Return to Search" button, which is labeled "Return to Search".

Clicking the **Return to Search** button will navigate back to the **General Info** tab.

If the search returns multiple matches, then place a check in the box next to the appropriate offering and click the **Schedule** button.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Provider Search Provider Detail Offering Search Offering Detail

1 - 4 of 4

Quick Search General Info Custom

Location: WIB Albany/Rensselaer/Schene City:  Start Date Range: From  To

Provider Information:
   
 Provider Name:  Service Name: NEG Program: ▼
  
 Provider Status: Active
  
 Service Type:  Service Type

<input type="checkbox"/>	Provider Name	Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>	K & L Rhodes, Inc.	NEG ARRA - OJT	K & L Rhodes, In				
<input type="checkbox"/>	Rochester Computer Recycli	NEG ARRA - OJT	Regional Compu				
<input type="checkbox"/>	Solomon & Solomon PC	NEG ARRA - OJT	Solomon & Solo				
<input checked="" type="checkbox"/>	The John Brooks Institute	NEG OJT	Capital Region I				

Options Search Clear Detail Delete Print List Schedule

**Schedule**

The **Schedule** button returns the user to the **Services** tab.

The service will be highlighted at the bottom portion of the screen. If not, then click the check box to activate the fields. Enter the **Planned Start Date**, **Planned End Date**, **Actual Start Date**, and click the **Program Svc Type** drop-down arrow. Select **Non-ITA Training** from the **Program Services Type** drop-down field. The NEG OJT may not exceed 6 months in duration.

\*All dates must be in MM/DD/YYYY format.

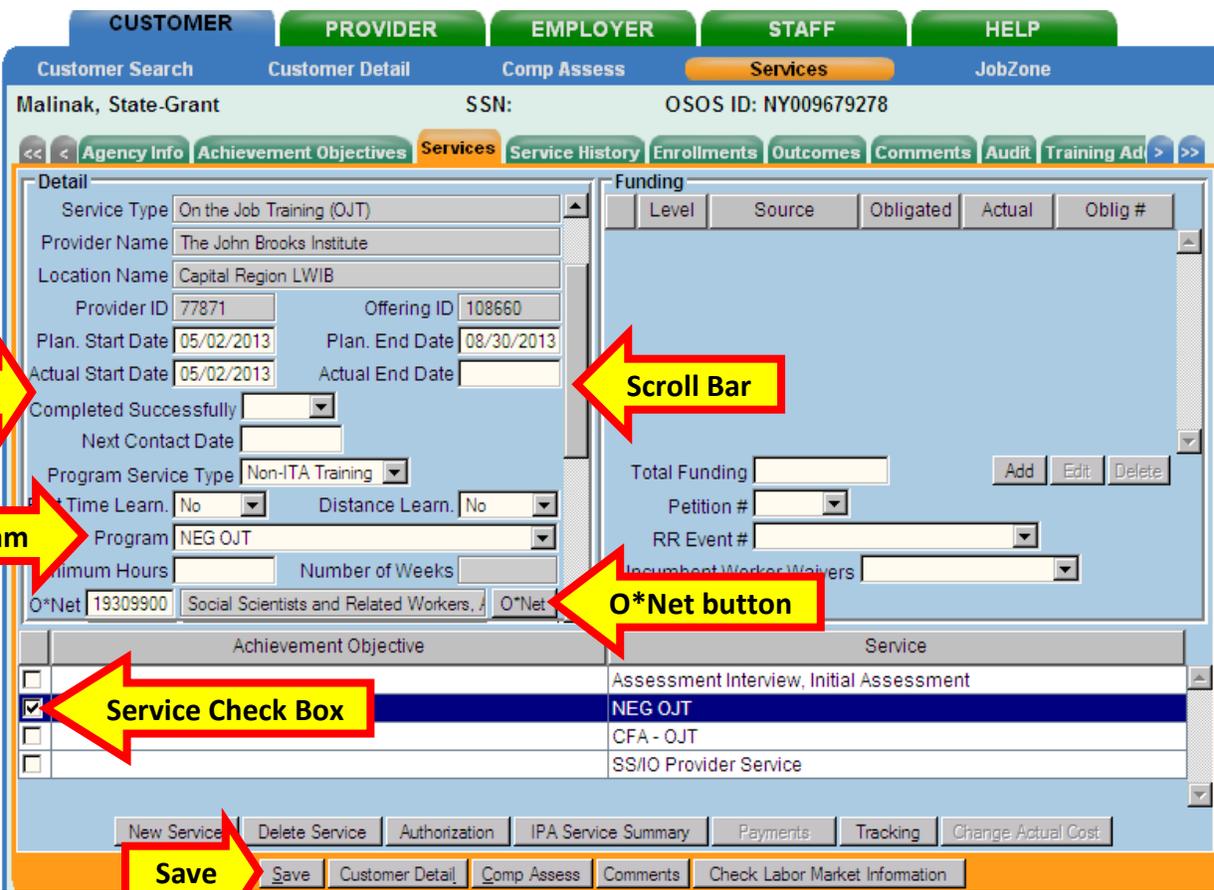
It may be necessary to use the scroll bar at the right hand side of the **Detail** section to access additionally required data fields.

Complete the **Part Time Learning** and **Distance Learning** data fields.

Select **NEG OJT** from the Program drop down list. The **NEG ARRA Dislocated Worker** option has been removed.

Enter the O\*Net code or click the **O\*Net** button to access the Webpage Dialog search.

Click the **Save** button.



The screenshot shows the OSOS interface with the **Services** tab selected. The **Detail** section contains the following fields:

- Service Type:** On the Job Training (OJT)
- Provider Name:** The John Brooks Institute
- Location Name:** Capital Region LWIB
- Provider ID:** 77871
- Offering ID:** 108660
- Plan. Start Date:** 05/02/2013
- Plan. End Date:** 08/30/2013
- Actual Start Date:** 05/02/2013
- Actual End Date:** (empty)
- Completed Successfully:** (dropdown menu)
- Next Contact Date:** (empty)
- Program Service Type:** Non-ITA Training
- Part Time Learn.:** No
- Distance Learn.:** No
- Program:** NEG OJT
- Minimum Hours:** (empty)
- Number of Weeks:** (empty)
- O\*Net:** 19309900

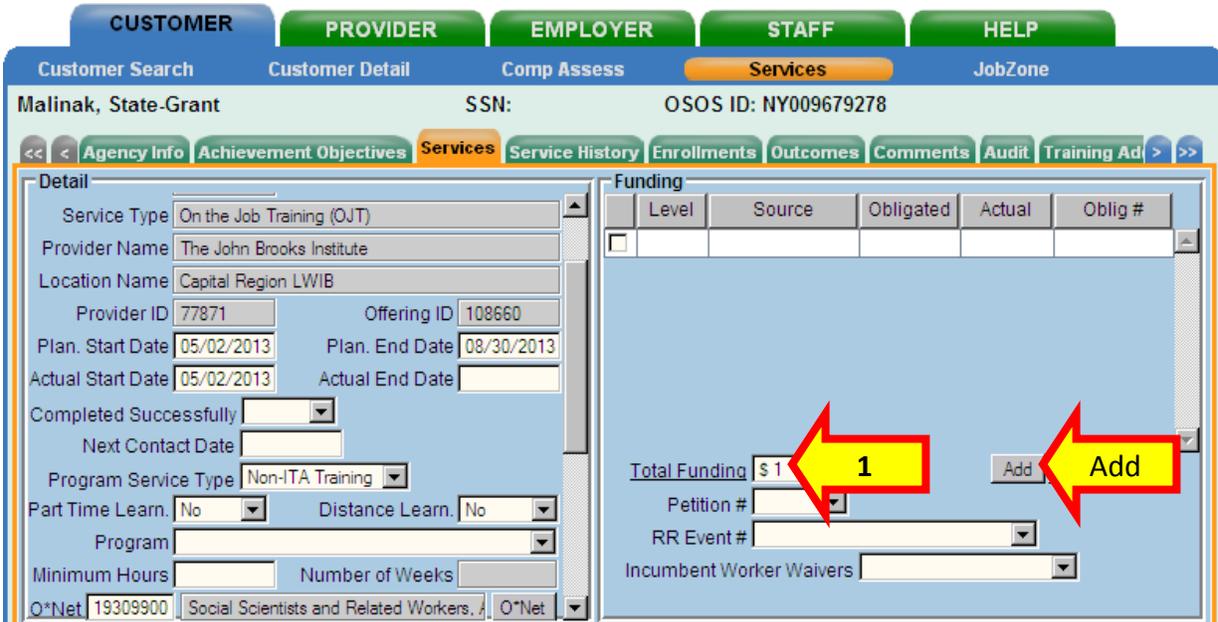
The **Funding** section includes a table with columns: Level, Source, Obligated, Actual, and Oblig #. Below the table are fields for Total Funding, Petition #, RR Event #, and Incumbent Worker/Workers.

At the bottom, there is a table with columns: Achievement Objective and Service. The row for **NEG OJT** is highlighted, and its checkbox is checked.

Annotations on the screenshot include:

- Dates:** Points to the date input fields.
- Scroll Bar:** Points to the vertical scroll bar on the right side of the Detail section.
- Program:** Points to the Program dropdown menu.
- O\*Net button:** Points to the O\*Net button.
- Service Check Box:** Points to the checked checkbox for the NEG OJT service.
- Save:** Points to the Save button at the bottom of the screen.

Enter a 1 in the **Total Funding** field and click the **Add** button. OSOS will automatically add the dollar sign, decimal point and two zeros.



Customer: Malinak, State-Grant SSN: OSOS ID: NY009679278

Service Type: On the Job Training (OJT)  
 Provider Name: The John Brooks Institute  
 Location Name: Capital Region LWIB  
 Provider ID: 77871 Offering ID: 108660  
 Plan. Start Date: 05/02/2013 Plan. End Date: 08/30/2013  
 Actual Start Date: 05/02/2013 Actual End Date:   
 Completed Successfully:   
 Next Contact Date:   
 Program Service Type: Non-ITA Training  
 Part Time Learn: No Distance Learn: No  
 Program:   
 Minimum Hours: Number of Weeks:   
 O\*Net: 19309900 Social Scientists and Related Workers, / O\*Net

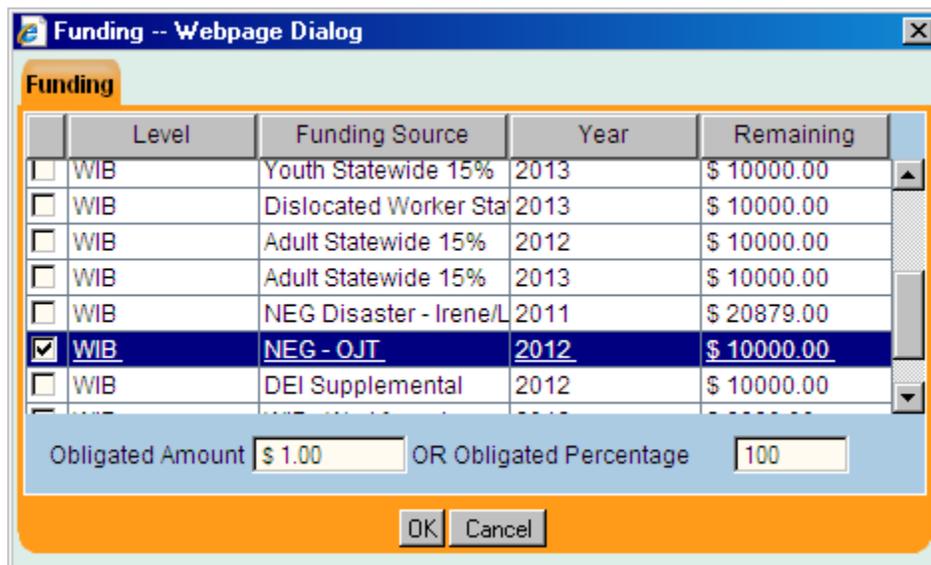
Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>				

Total Funding \$ 1 Add  
 Petition #  
 RR Event #  
 Incumbent Worker Waivers

OSOS will automatically navigate to the **Funding--Webpage Dialog** box that lists the available funds for the customer.

Enter the number one in the **Obligated Amount**. OSOS will automatically add the dollar sign, decimal point, two zeros and complete the **Obligated Percentage** data field.

Select the **NEG - OJT** funding with the appropriate **Year** and click the **OK** button.



Level	Funding Source	Year	Remaining
<input type="checkbox"/>	Youth Statewide 15%	2013	\$ 10000.00
<input type="checkbox"/>	Dislocated Worker Sta	2013	\$ 10000.00
<input type="checkbox"/>	Adult Statewide 15%	2012	\$ 10000.00
<input type="checkbox"/>	Adult Statewide 15%	2013	\$ 10000.00
<input type="checkbox"/>	NEG Disaster - Irene/L	2011	\$ 20879.00
<input checked="" type="checkbox"/>	NEG - OJT	2012	\$ 10000.00
<input type="checkbox"/>	DEI Supplemental	2012	\$ 10000.00

Obligated Amount \$ 1.00 OR Obligated Percentage 100

OK Cancel



Click the **Save** button.

If it is the first service, the **Verification--Webpage Dialog** for a new Common Measures and WIA enrollment will appear. Review the data in the **Customer Detail** section and, if you have the appropriate permission, the **Comprehensive Assessment** tabs.

When finished, click the **OK** button.

Any changes will automatically populate the data fields throughout OSOS.

The screenshot shows a software window titled "Verification -- Webpage Dialog" with two tabs: "Customer Detail" and "Comp Assess". A yellow arrow points to these tabs with the text "Customer Detail and Comprehensive Assessment tabs". The "Customer Detail" tab is active and contains the following sections:

- General Information:**
  - Education Level: 12 Grade - no Diploma
  - School Status: Not attending school or H.S. Dropout
  - Employment Status: Not Employed
  - UI Claimant: Exhaustee
  - Profiled: [ ] Profiled Date: [ ]
- Programs & Public Assistance:**
  - TANF: [ ]
  - GA: [ ]
  - RCA: [ ]
  - SSI: [ ]
  - Food Stamps: [ ]
  - SSDI: [ ]
  - Dislocated Worker: Yes [ ] 01/13/2010
  - Displaced Homemaker: Yes [ ] 01/01/2008
  - Other WIA Programs: [ ]
- Income & Disability Status:**
  - Lower Living Standard: Yes [ ] Income 70% LLSIL: N/A [ ]
  - Local Priority: N/A [ ]
  - Disability Status: Not Disclosed [ ]

On the right side of the window, there are sections for:

- Migrant:** Migrant / Seasonal Wkr [ ] Yes [ ] No [ ]
- Military Service:** Service Veteran [ ]
- Selective Service:** Selective Service [x]
- Work History:** Reason for Leaving: Category 1-DW; Dislocation Date: 01/03/2013

At the bottom of the window are "OK" and "Cancel" buttons.



Click the gray **Customer Detail** button at the bottom of the page and then the gray **Service** button to refresh the record. Click the **Enrollments** tab. The WIA enrollment will now be visible.

Customer Search: Malinak, State-Grant      SSN:      OSOS ID: NY009679278

Agency Info | Achievement Objectives | **Services** | Service History | **Enrollments** | Outcomes | Comments | Audit | Training Ad

**Enrollment Info**

Program Type: WIA  
 Enrollment Date: 05/02/2013  
 Enrolling Service Name: NEG OJT  
 Enrolling Service Type: On the Job Training (OJT)  
 Enrolling Admin: Rotman, Neil  
 Enrolling Office: Albany Career Central  
 Staff Assisted: Yes  
 Employment Status: Not Employed

**Exit Info**

Exit Date:      Exit Reason:      Exit Admin:      Exit Office:      Transaction Date:      Transaction Admin:      Transaction Office:

Program Type	Enr. Date	Enrollment Office	Exit Date	Exit Office	SA
<input type="checkbox"/> Labor Exchange	07/31/2013	NY9999			No
<input type="checkbox"/> Common Measures	05/02/2013	Albany Career Central			Yes
<input checked="" type="checkbox"/> WIA	05/02/2013	Albany Career Central			Yes
<input type="checkbox"/> Common Measures	07/12/2010	NY9999	07/19/2010	Suffolk Co One Stop Employ Center	Yes
<input type="checkbox"/> Labor Exchange	07/12/2010	NY9999	07/19/2010	Suffolk Co One Stop Employ Center	Yes

Buttons: Save, Customer Detail, Comp Assess, Comments, Check Labor Market Information

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 OJT monies, enter as Level 1 (L1) services, navigate to the **Customer Detail** window in the **Customer** module. Click the **Activity** button.

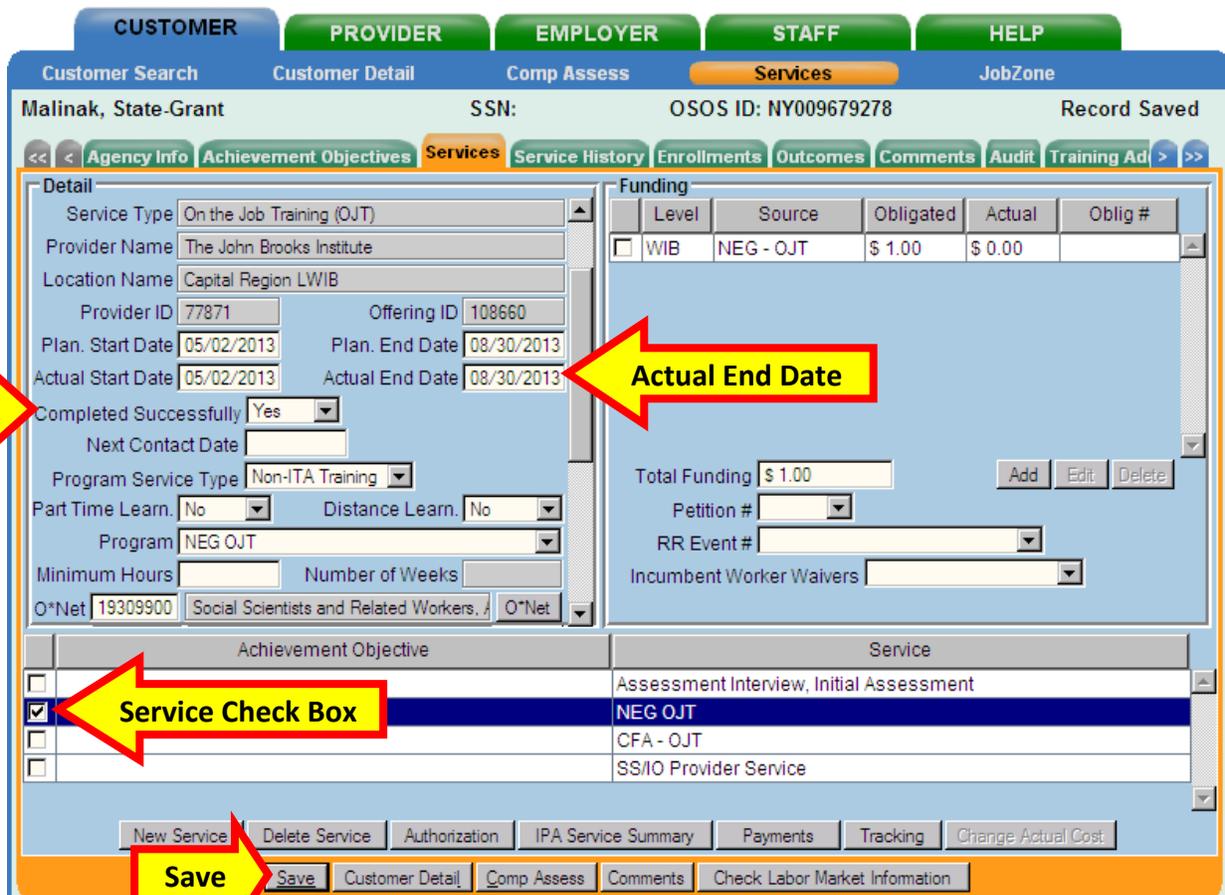
When the customer has completed the OJT the service must be closed.

Go to the **Services** tab.



*When any service is completed, check the box next to the NEG OJT service to access the data fields and enter the Actual End Date and Completed Successfully status.*

Click the **Save** Button.



The screenshot shows the OSOS interface for a customer named Malinak, State-Grant. The 'Services' tab is active, displaying a list of services. A red arrow points to the 'Actual End Date' field in the 'Detail' section, which is set to 08/30/2013. Another red arrow points to the 'Completed Successfully' dropdown menu, which is set to 'Yes'. A third red arrow points to the 'Service Check Box' next to the 'NEG OJT' service in the list. A fourth red arrow points to the 'Save' button at the bottom of the interface.

Level	Source	Obligated	Actual	Oblig #	
<input type="checkbox"/>	WIB	NEG - OJT	\$ 1.00	\$ 0.00	

Achievement Objective	Service
<input type="checkbox"/>	Assessment Interview, Initial Assessment
<input checked="" type="checkbox"/>	NEG OJT
<input type="checkbox"/>	CFA - OJT
<input type="checkbox"/>	SS/IO Provider Service

The [Training Addl Info](#) and [Addl Outcomes](#) tabs must be completed. Desk Guides are available for these two tabs.



## RESOURCES AND ASSISTANCE

[TA 11-12](#) regarding Program Eligibility and Data Element Validation.

[TA 12-12.1](#), Implementation of Veterans' Priority of Service for Covered Persons in Qualified USDOL Job Training Programs.

[TA 08-4.1](#), Effective Use of Initial Assessment in the Workforce Investment One-Stop System.

[TA 09-17](#), Individual Employment Plans/Training Plans for WIA Participants in Training.

[TA 10-15.1](#), Updated Local Workforce Investment Area (LWIA) On-the-Job-Training Policy.

[TA 10-3](#), Requirements for the Collection of Additional Participant Demographic Information upon Receipt of Intensive or Training Services under Title I-B of the Workforce Investment Act of 1998

OJT-NEG Program Guidance [Letter #1](#).

OJT-NEG Program Guidance [Letter#2](#).

NYSDOL OJT-NEG [Q&A's](#)

[TEN 38-09](#), ARRA On-The-Job Training National Emergency Grants.

On-the-Job Training National Emergency Grants on USDOL ETA [website](#).

USDOL ETA's [OJT Toolkit](#).

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](mailto:help.osos@labor.ny.gov)