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.

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.

The Notice of Obligational Authority (NOA) Request forms for NEG (09) – OJT funding must be e-mailed to 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.


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”.

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

Click the **New Offering** button.
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.

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](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
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.

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.

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

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

Be sure to update the Comprehensive Assessment tabs where appropriate.
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.
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**.
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**.

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.
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.
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.

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.
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.
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.

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 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