OSOS

Desk Guide for the

RFA 20-R State-Level OJT Program

Program Overview

1. The New York State Department of Labor (NYSDOL) recognizes that hiring an employee can be a significant and costly undertaking, particularly when the newly hired employee requires On-the-Job Training (OJT).

2. NYSDOL also recognizes that long term unemployment in New York State poses a significant burden on the State's fiscal condition, and should be addressed as a priority with the Department's public workforce investment funding. The purpose of this OJT program is to provide incentives through OJT grants to businesses who hire long term unemployed workers, and to provide these workers with a competitive advantage in the labor market.

3. OJT accelerates the employee gaining proficiency in the knowledge, skills and abilities necessary to satisfactorily perform the job.

4. OJT is a formal contract between employer, employee, and the grantor in which individualized hands on occupational training under close supervision is provided to an employee at the work place.

5. The employee earns comparable wages while the employer receives cash payments to offset training costs.

TABLE OF CONTENTS

Chapter 1 - Business Data Entry (Employer Activities)……3-12

Chapter 2 – Provider Services……..13-28

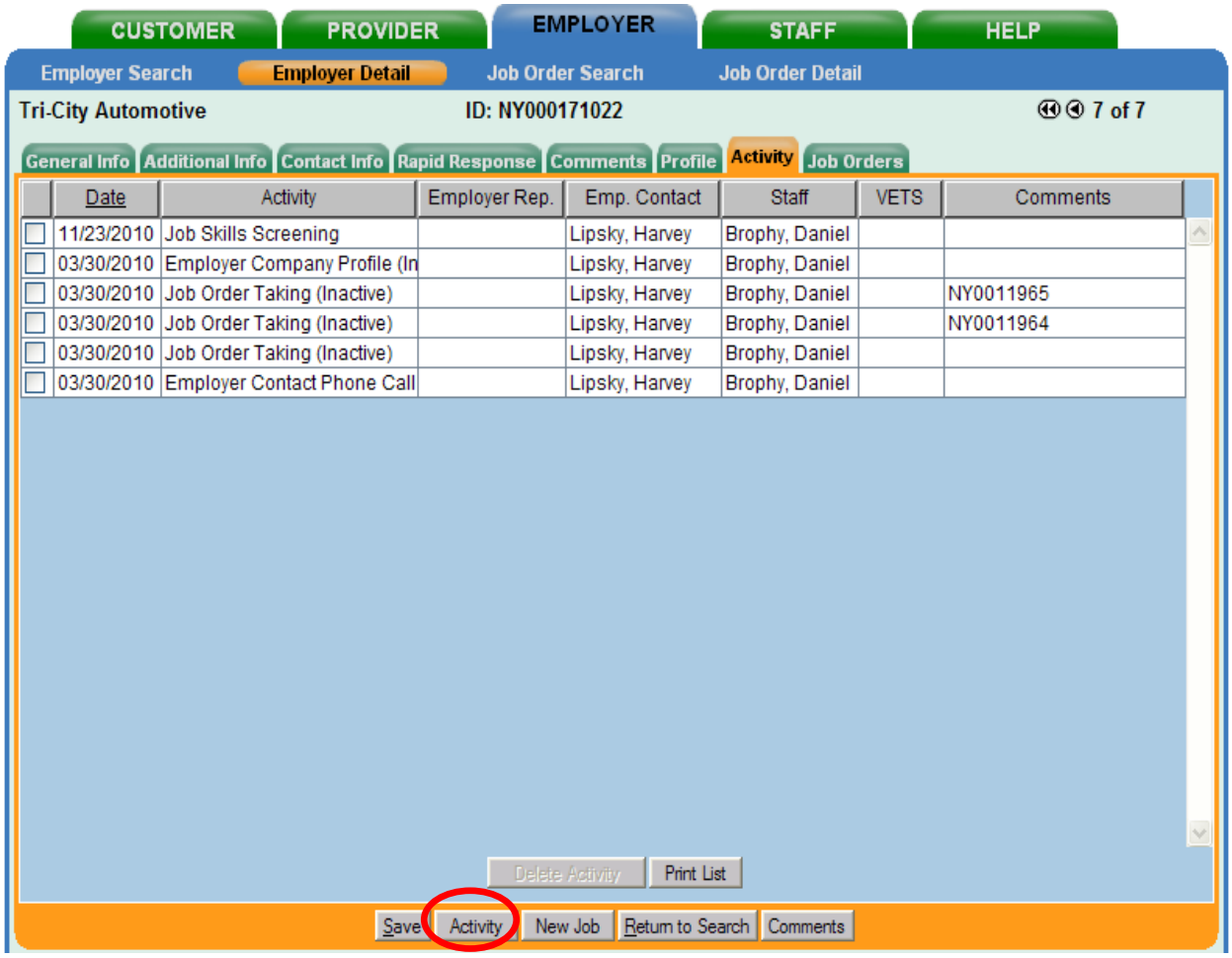
Chapter 3 – Job Seeker/Customer Data Entry……..29-42

Chapter 4 – Job Seeker/Customer Data Entry (Training Addl Info Tab)….....43-53

Chapter 1

Business Data Entry (Employer Activities)

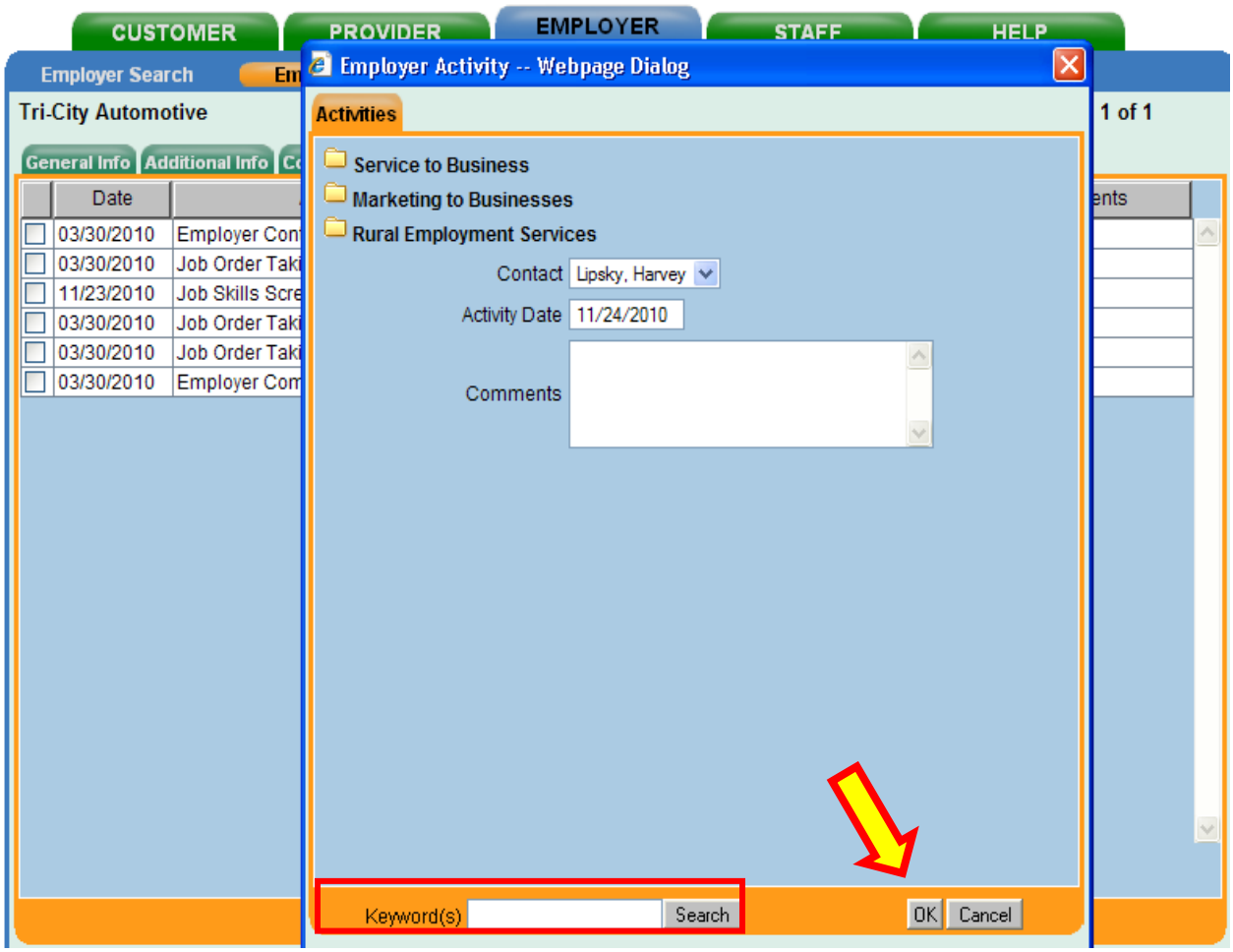
Employer Module, Employer Detail Window



The **Activity** tab is used to record various services and activities provided to employers by staff. To add an Activity, click on the Activity button at the bottom of the screen. The **Employer Activity Dialog Box** will pop up. The Activity button is available on all of the Employer Detail Window tabs.

Chapter 1 - Business Data Entry (Employer Activities)

Employer Module, Employer Detail Window



Staff may choose one or more activities from the **Employer Activity – Webpage Dialog** box by using a Keyword(s) search or a Hierarchy Search.

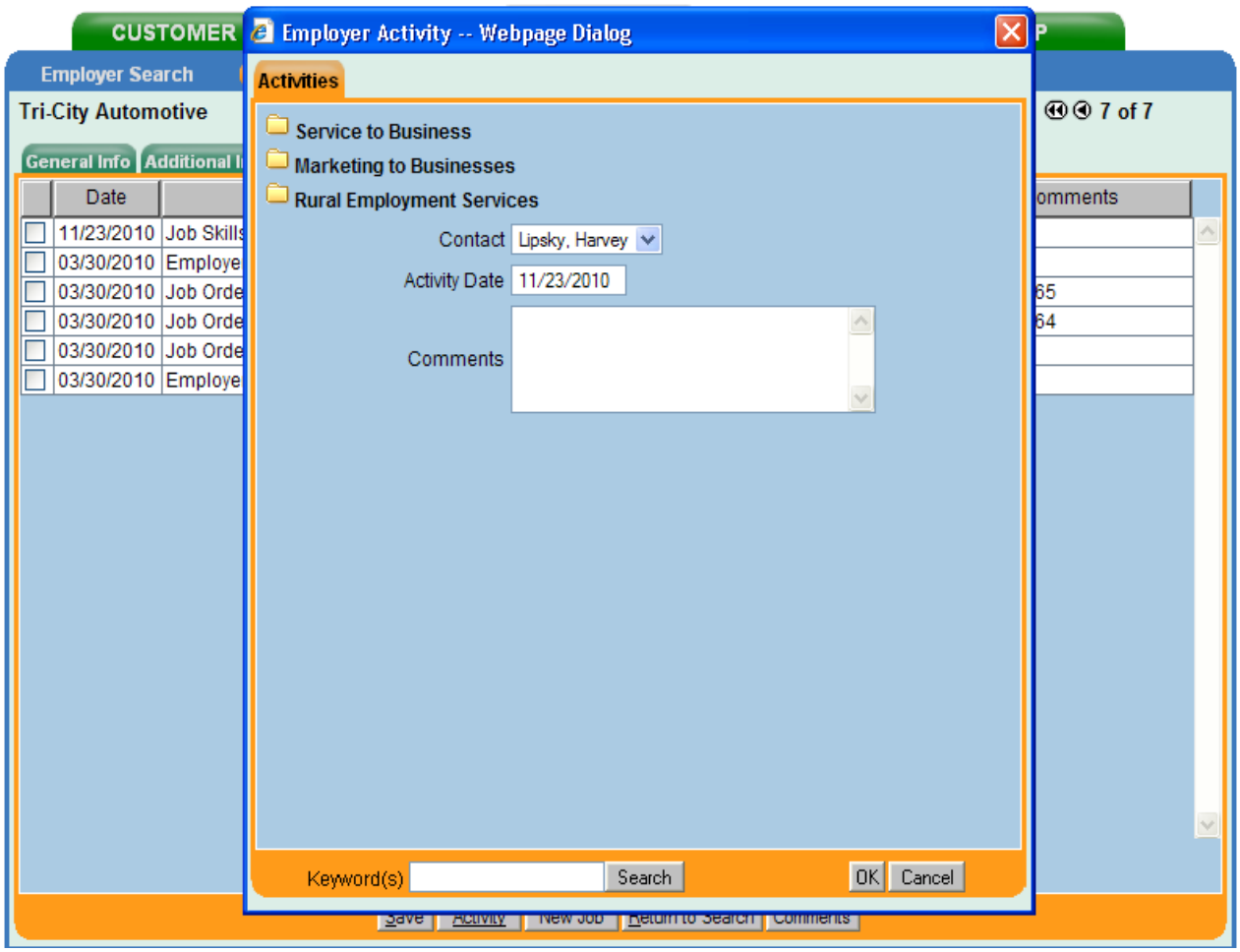
To perform a ***Keyword(s) Search*** type the name, or part of the name of the activity, into the Keyword(s) text box and select the Search button. Check the box next to the appropriate activity & click on the **OK button**.

To perform a ***Hierarchy Search*** click the folders to “drill down” until you find the activity that you are looking for. Check the box next to the appropriate activity & click on the **OK button**.

The Activity will be recorded on the Employer Detail Activity tab.

Chapter 1 - Business Data Entry (Employer Activities)

Employer Module, Employer Detail Window – Activity Tab



Employer activities are organized into 3 sets of folders; ***Group***, ***Category*** & ***Activity***.

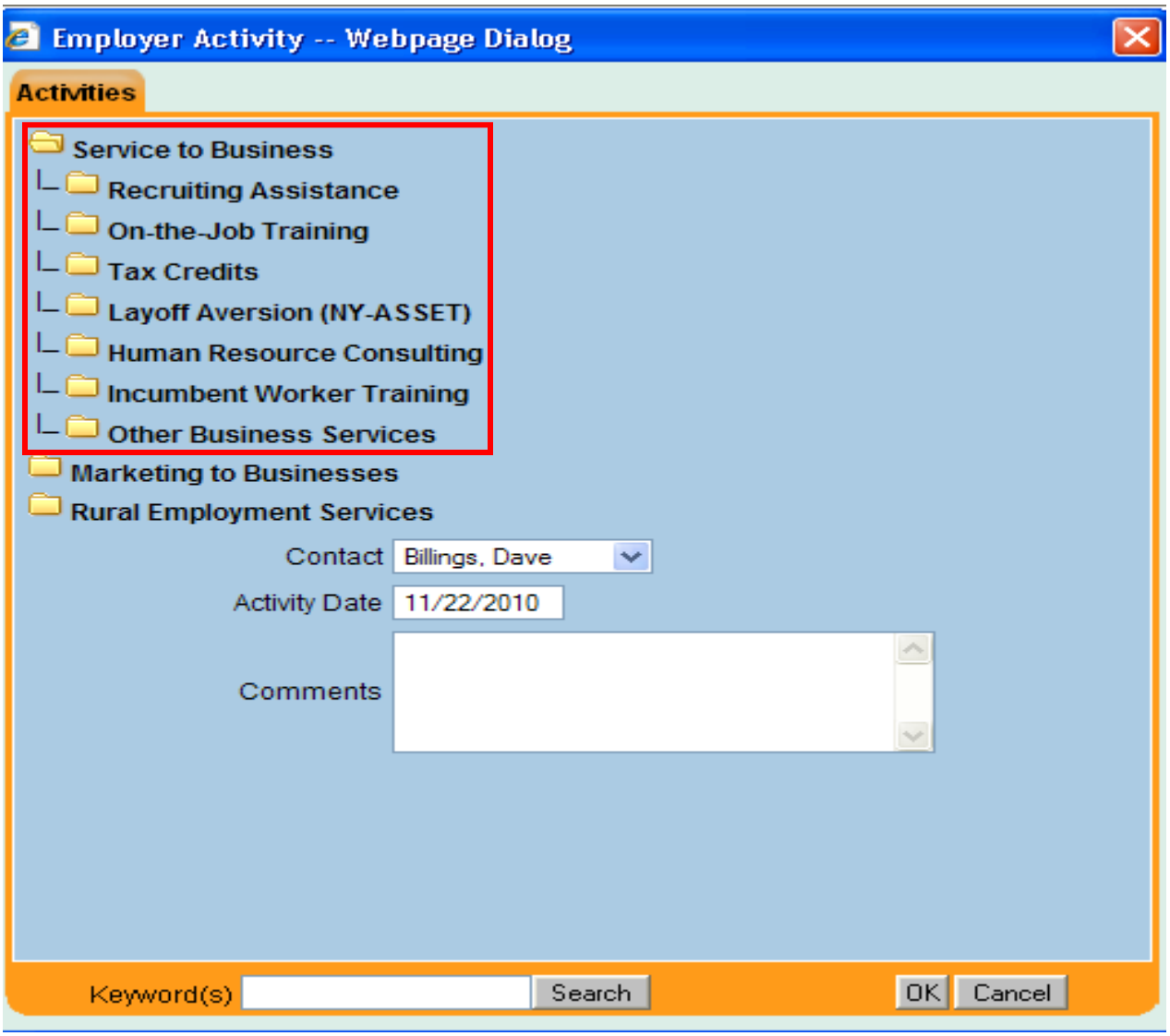
The Employer Activity Dialog Box contains 3 main ***Group*** folders; **Service to Business**, **Marketing to Businesses** and **Rural Employment Services.**

Chapter 1 - Business Data Entry (Employer Activities)

Service to Business Activities Folder

The ***Service to Business Group*** has 7 categories: Recruiting Assistance, On-the-Job Training, Tax Credits, Layoff Aversion (NY-ASSET), Human Resource Consulting, Incumbent Worker Training & Other Business Services.

Under these 7 categories are 35 activities (services).

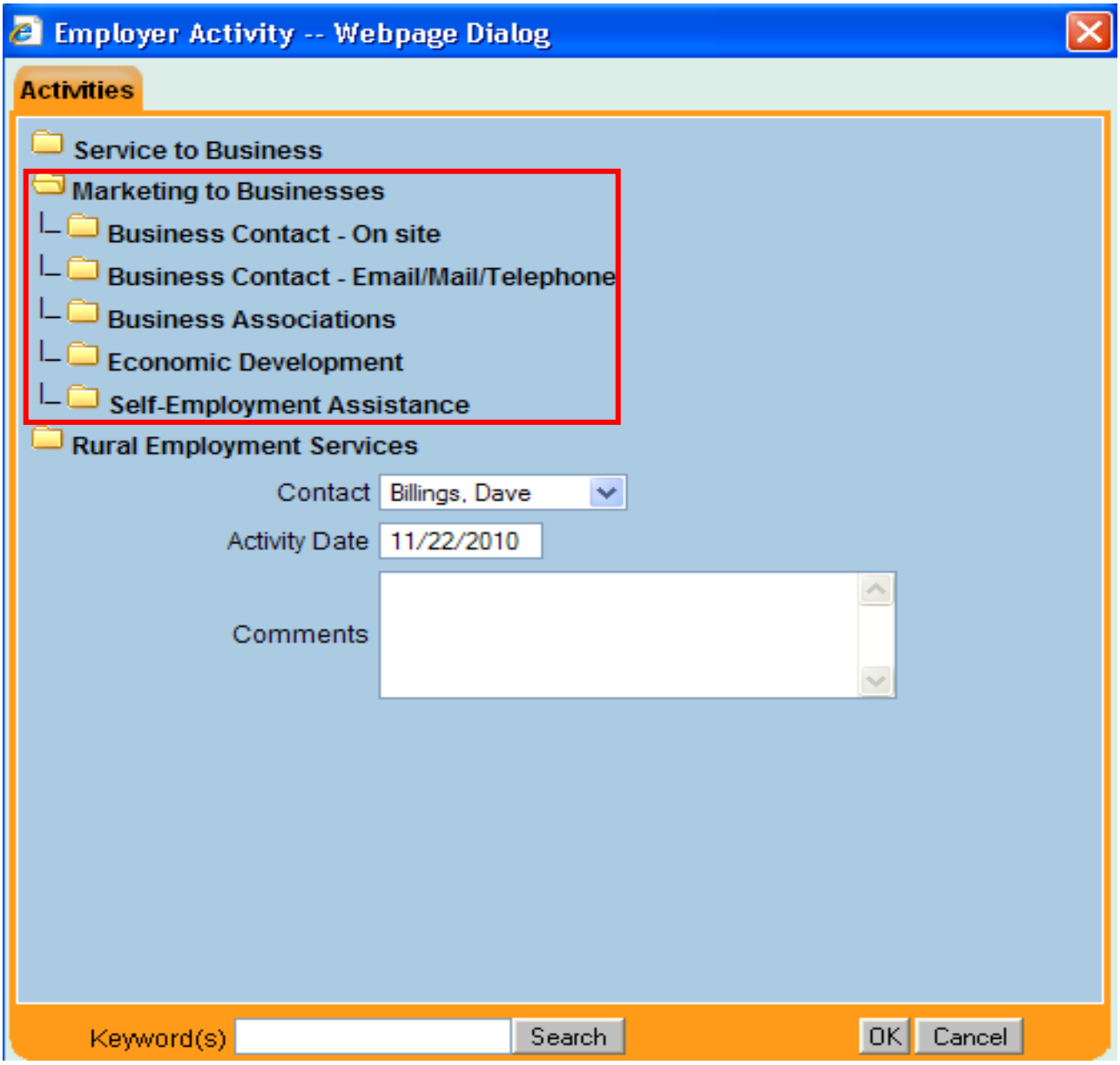


Chapter 1 - Business Data Entry (Employer Activities)

Marketing to Businesses Activities Folder

The ***Marketing to Businesses Group*** has 5 categories: Business Contact – On Site, Business Contact – Email/Mail/Telephone, Business Associations, Economic Development & Self-Employment Assistance.

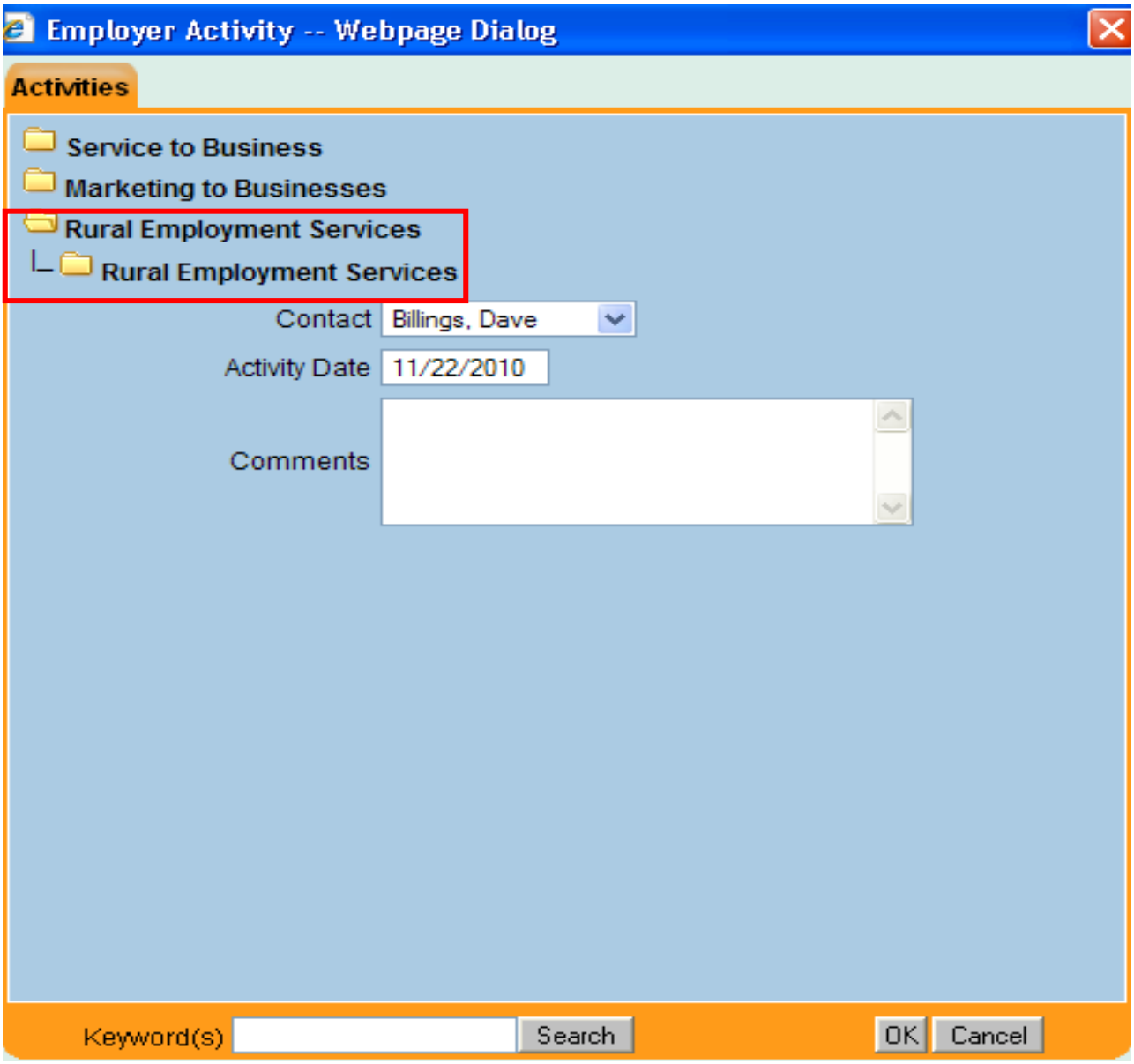
Under these 5 categories are 34 activities (services).



Chapter 1 - Business Data Entry (Employer Activities)

Rural Employment Services Activities Folder

The ***Rural Employment Services Group*** has one category, also called Rural Employment Services, and 2 activities. Business Services staff will not be required to use the Rural Employment Services activities.



Chapter 1 - Business Data Entry (Employer Activities)

Employer Activities

The Service to Business Group has 7 categories: Recruiting Assistance, On-the-Job Training, Tax Credits, Layoff Aversion (NY-ASSET), Human Resource Consulting, Incumbent Worker Training & Other Business Services.
These categories cover 35 activities (services).

GROUP	CATEGORY	SERVICE (Activity)
Service to Business	***Recruiting Assistance***	Job Order Development
		Job Skills Screening
		On-Site Recruitment
		Customized Recruitment
		Job Matching
		Career Fair Participation
		JOBcentral Training Session
	On-the-Job Training	Job Order Entry
		Job Matching (OJT)
		Referral (OJT)
		Comprehensive Skills Gap Analysis
		On-the-Job Training (OJT) Application
		On-the-Job Training (OJT) Follow-up
	Tax Credits	Tax Credit Certification
	Layoff Aversion (NY-ASSET)	Assessment
		Referral
		Layoff Aversion Follow-up

Chapter 1 - Business Data Entry (Employer Activities)

Employer Activities - *Service to Business Group continued.*

GROUP	CATEGORY	SERVICE (Activity)
Service to Business	***Human Resource Consulting***	Assistance Writing Job Descriptions
		Employee Handbook Development
		HR Compliance / Legal Issues
		Job Analysis / Skills Gap Analysis
		Grant Writing Assistance
		Testing
		Other HR Issues
		Other Workshop
	Incumbent Worker Training	Classroom Training
		E-Learning
		Other Training
	Other Business Services	Economic / Labor Market Information
		Alien Certification
		Statutory Legal Issues
		UI Information
		Rapid Response Contact
		Referral

Chapter 1 - Business Data Entry (Employer Activities)

Employer Activities

The Marketing to Businesses Group has 5 categories: Business Contact – On Site, Business Contact – Email/Mail/Telephone, Business Associations, Economic Development & Self-Employment Assistance. ***These categories cover 34 activities.***

GROUP	CATEGORY	SERVICE (Activity)
Marketing to Businesses	***Business Contact - On-Site and Business Contact – Email/Mail/Telephone***	Overview of Services
		Recruiting Assistance
		On-the-Job Training (OJT)
		SMART2010
		WOTC
		HIRE Act
		Layoff Aversion
		Shared Work Presentation
		Succession Planning
		Career Fair
		Human Resources Consulting
		Incumbent Worker Training
		Federal Bonding Program
	Business Associations	Chamber
		Local Event
		Organized Labor Event
		JSEC
	Economic Development	Meeting
		Presentation
	Self-Employment Assistance	Self-Employment Assistance
		Referral

Employer Activities

The ***Rural Employment Services Group*** has one category, also called Rural Employment Services, and 2 activities. Business Services staff will not be required to use the Rural Employment Services activities.

GROUP	CATEGORY	SERVICE (Activity)
Rural Employment Services	**Rural Employment Services**	Self-Employment Assistance
		Referral

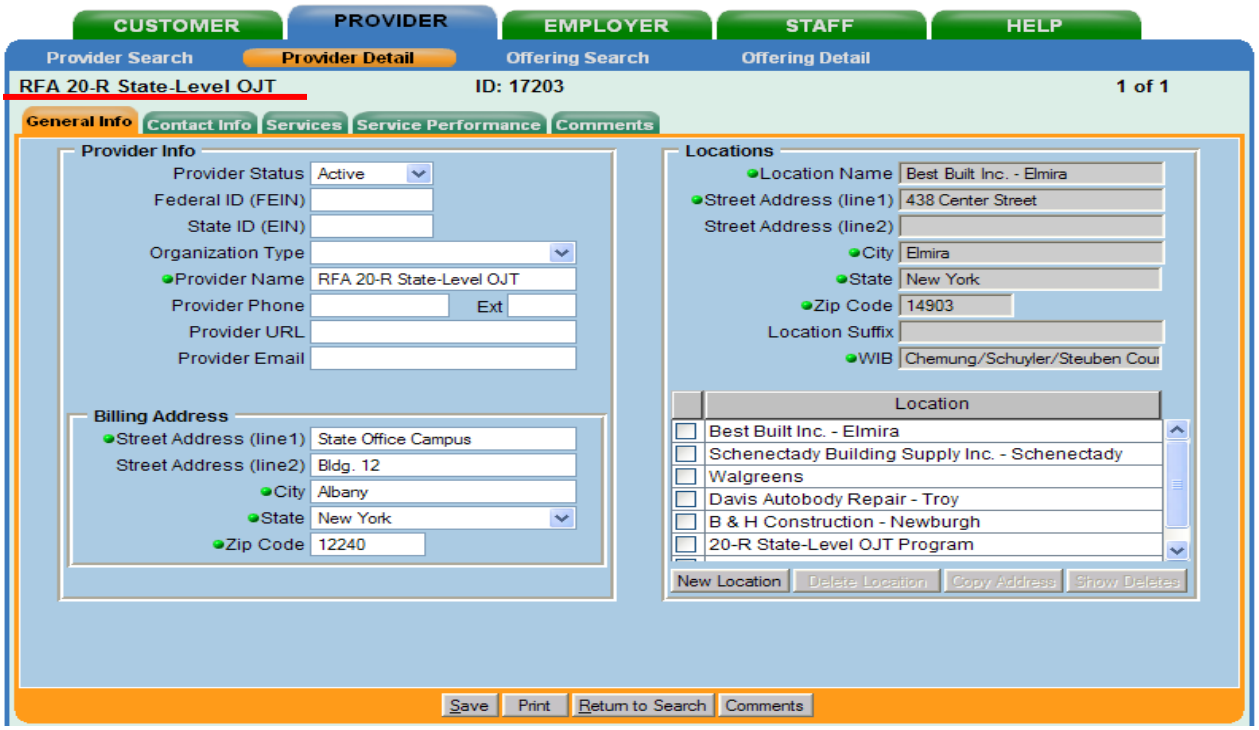
Chapter 2

Provider Services

The **Provider** module in OSOS stores information about the various service Providers across the state, including locations, contact information and offered L2 services. Specific permissions must be granted in order to use this module.

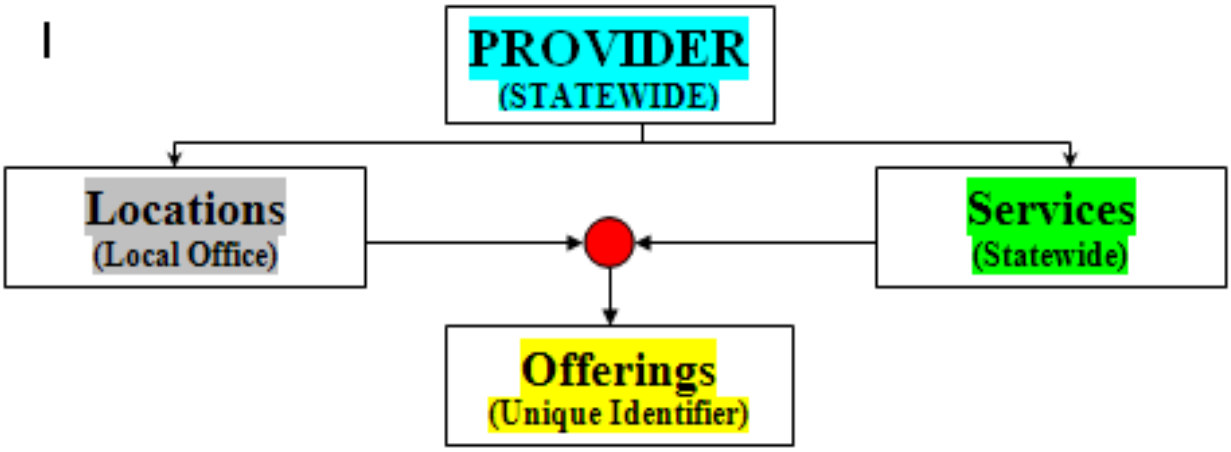
Responsibility for populating the Provider module has historically been that of the Local Workforce Investment Area Security Coordinator or their designee. It is strongly recommended by NYOSOS/REOS Central Support that a limited number of staff have access to this module to help prevent duplication and errors. Staff accessing this module should be well-versed in OSOS, with a good understanding of the system.

A Provider named **"RFA 20-R State Level OJT"** has been set up in OSOS. All customers of this program will be linked to this single provider through service offerings. Additional Information on setting up Services and Offerings can be found in the "Common Measures Desk Guide for Provider Module Data Entry and Maintenance" located at: http://www.labor.ny.gov/workforcenypartners/osos.shtm



Chapter 2 – Provider Services

Before entering or editing data in the Provider module, it is important to understand how it is structured. This flowchart shows the relationships between the different components of the Provider module.



Providers and their Services are entered into OSOS as statewide entities. Each Provider can have many Locations attached to different WIBs or different offices within the same WIB. Entering a new Provider into OSOS does **not** give the creating WIB exclusive rights to that Provider record. Other WIBs who also use the Provider may add Locations which reflect their use of the Provider.

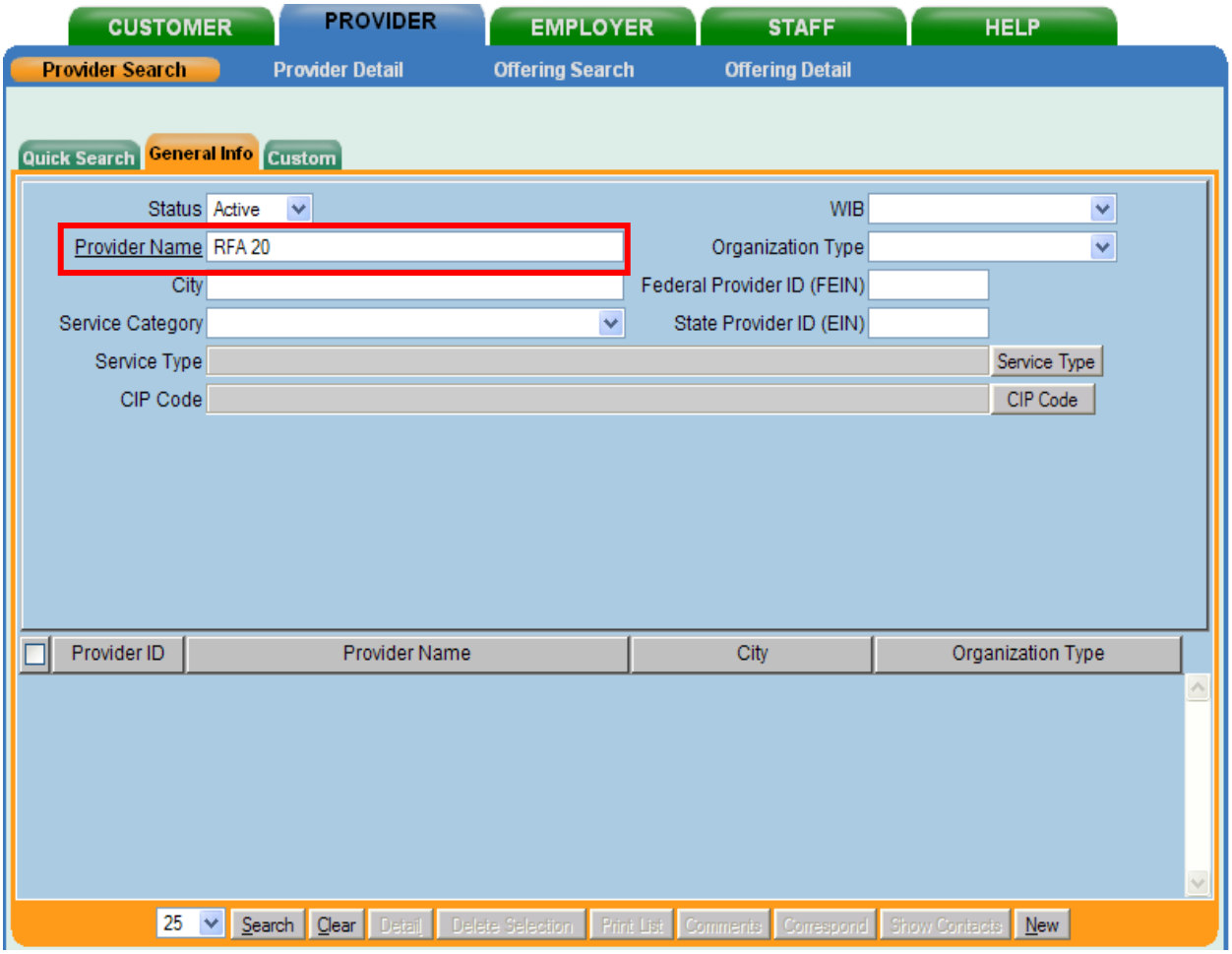
All Providers should be entered into OSOS only once, with the various locations and services attached. Unfortunately, some providers have been entered multiple times, leading to duplication, confusion and data entry errors.

Providers can have many different Services available to all offices, though not every office will necessarily use all services. The creation of an Offering is what associates a particular Service with a particular Location (office). Offerings are used by OSOS to identify what service a customer received and what office was responsible for providing it to the customer.

Provider Module, Provider Search Window – General Info Tab

In the Provider Module, Provider Search Window, General Info Tab, enter the first five characters of the “RFA 20-R State Level OJT” provider name in the Provider Name field.

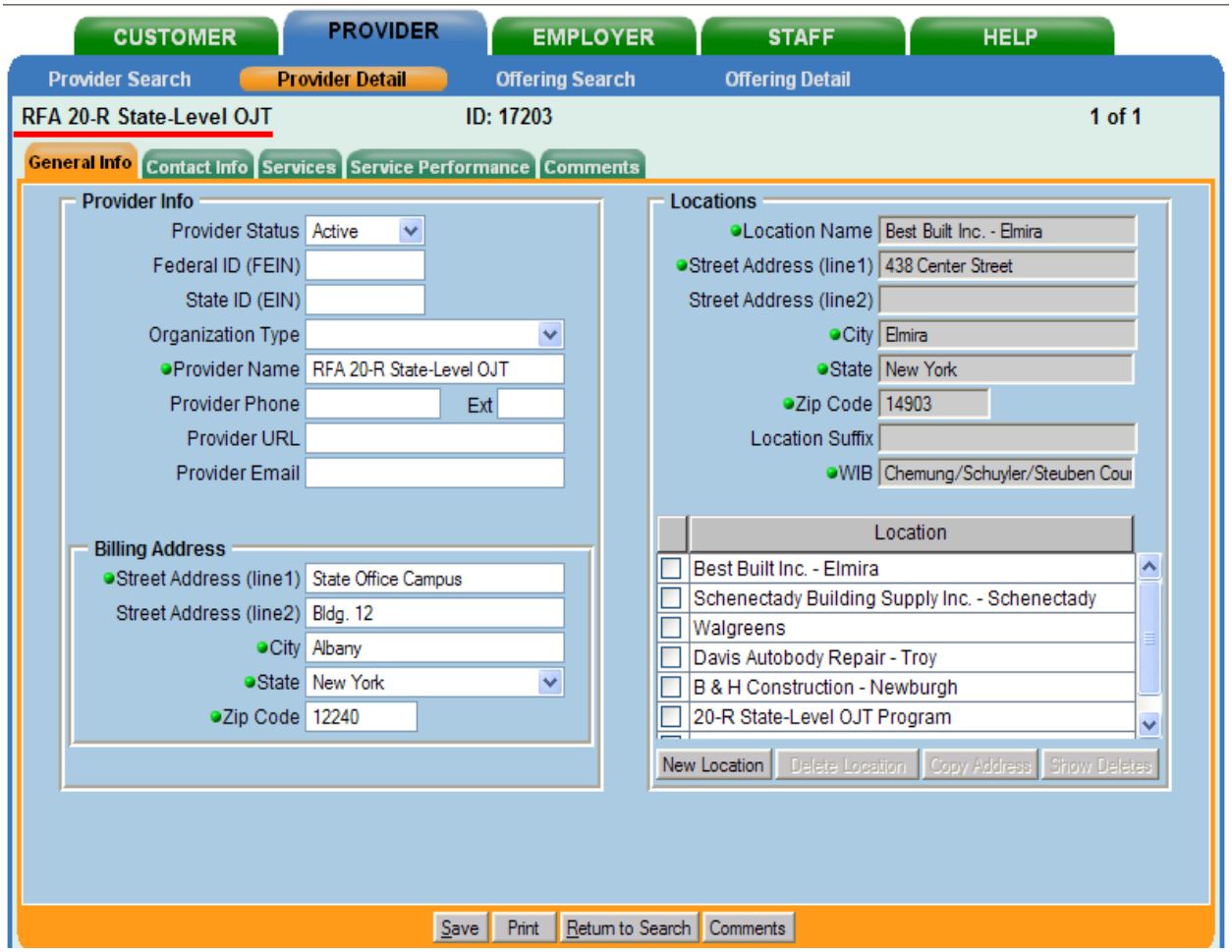
As with other search screens in OSOS, the full name is neither required nor recommended. The first few letters of the name should suffice to bring up the provider record.



Once you have entered the first five characters of the providers name click the **Search** button. In the example above “RFA 20” has been entered in the Provider Name field.

Chapter 2 – Provider Services

Provider Module, Provider Detail Window – General Info Tab

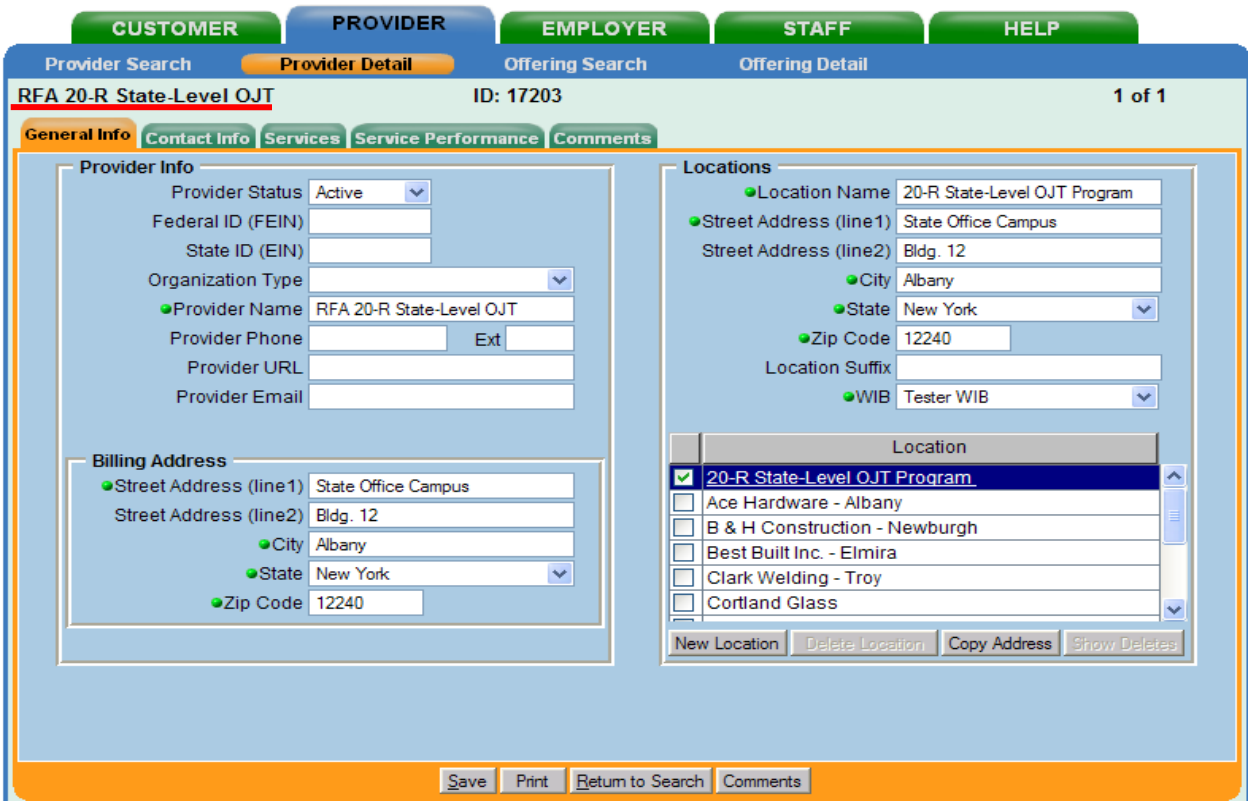


Since there is only one “RFA 20-R State Level OJT” provider record OSOS will open the Provider Detail Window for this provider. If there were more than one provider record a search results screen listing multiple Providers would appear. You would then click on the white box next to the provider that you were looking for to highlight it and click on the Detail button to open the Provider Detail Window.

Chapter 2 – Provider Services

Provider Module, Provider Detail Window – General Info Tab

The Provider Detail Window contains the basic information for the Provider and the Locations where this Provider offers services.



The **General Info** tab is comprised of 3 sections: **Provider Info**, **Billing Address** and **Locations**. **Provider Info** and **Billing Address** should reflect the primary location of the Provider, their "headquarters" or main billing address. Other satellite offices can be specified in **Locations**. For the RFA 20-R State-Level OJT Program a main Provider Record has been set up in OSOS with the following information:

Provider Info:

- Provider Status: Active
- Provider Name: RFA 20-R State-Level OJT

Billing Address:

- Street Address: State Office Campus, Bldg 12
- City: Albany
- State: New York
- Zip Code: 12240

Contact:

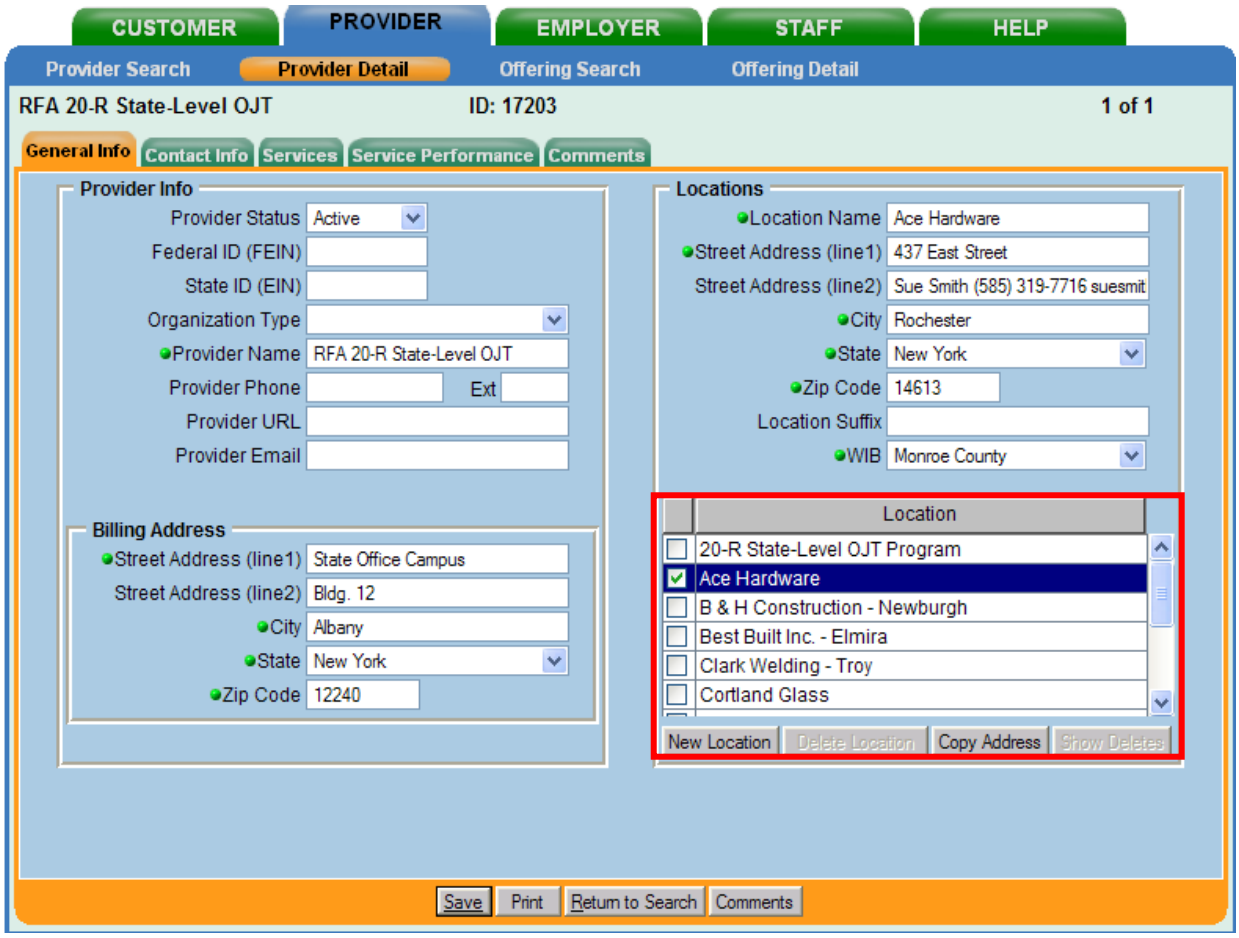
- Daniel Brophy

Provider Module, Provider Detail Window – General Info Tab

Adding a New Location

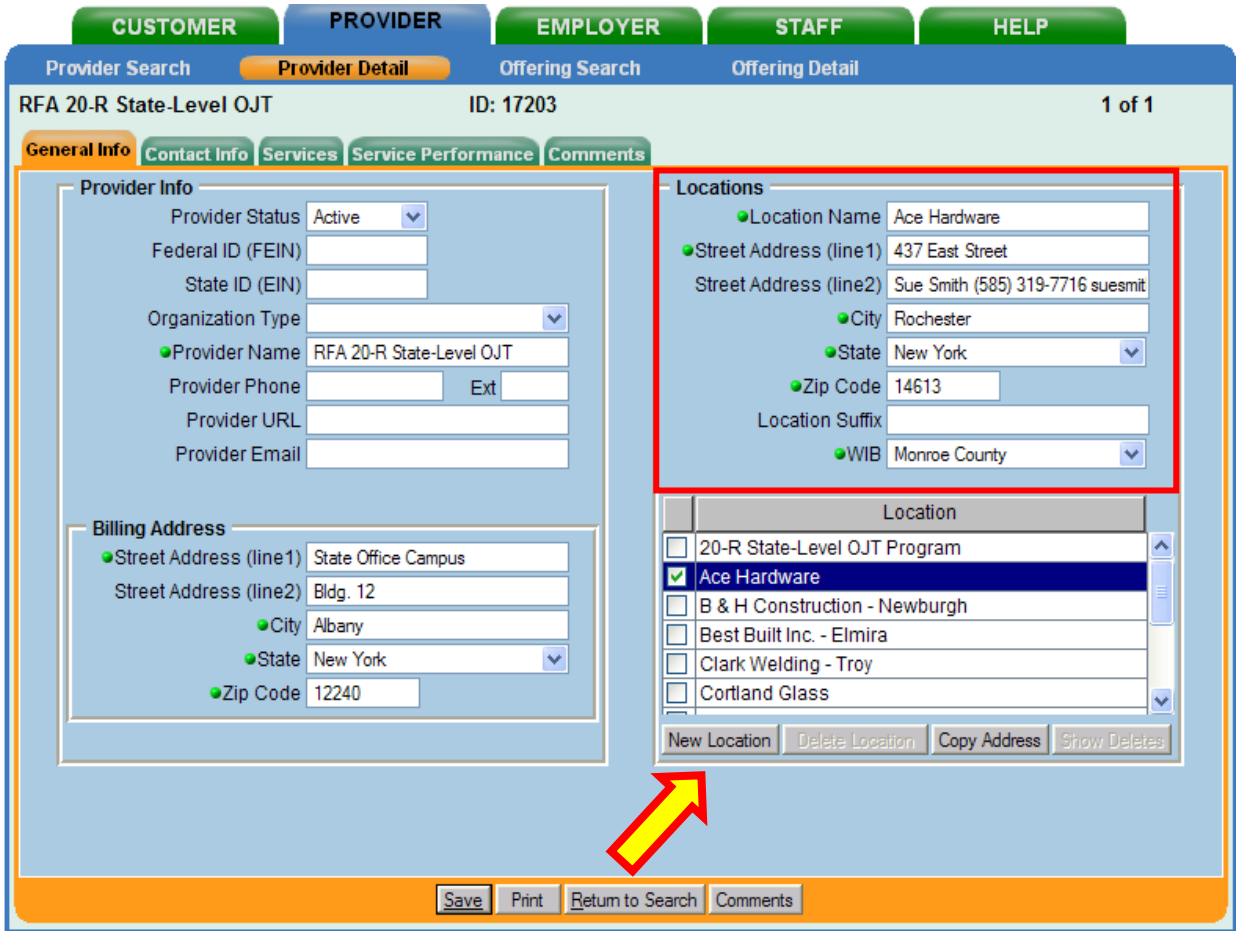
By adding their own location to the Provider, using their OJT employer's name, each WIB or office is able to create Offerings for their own use.

The graphic below lists several RFA 20-R OJT test employers. You can sort the Locations alphabetically by clicking on the grey Location bar.



Do not, under any circumstances, delete or change the Provider information of another WIB without their consent and cooperation.

Provider Module, Provider Detail Window – General Info Tab

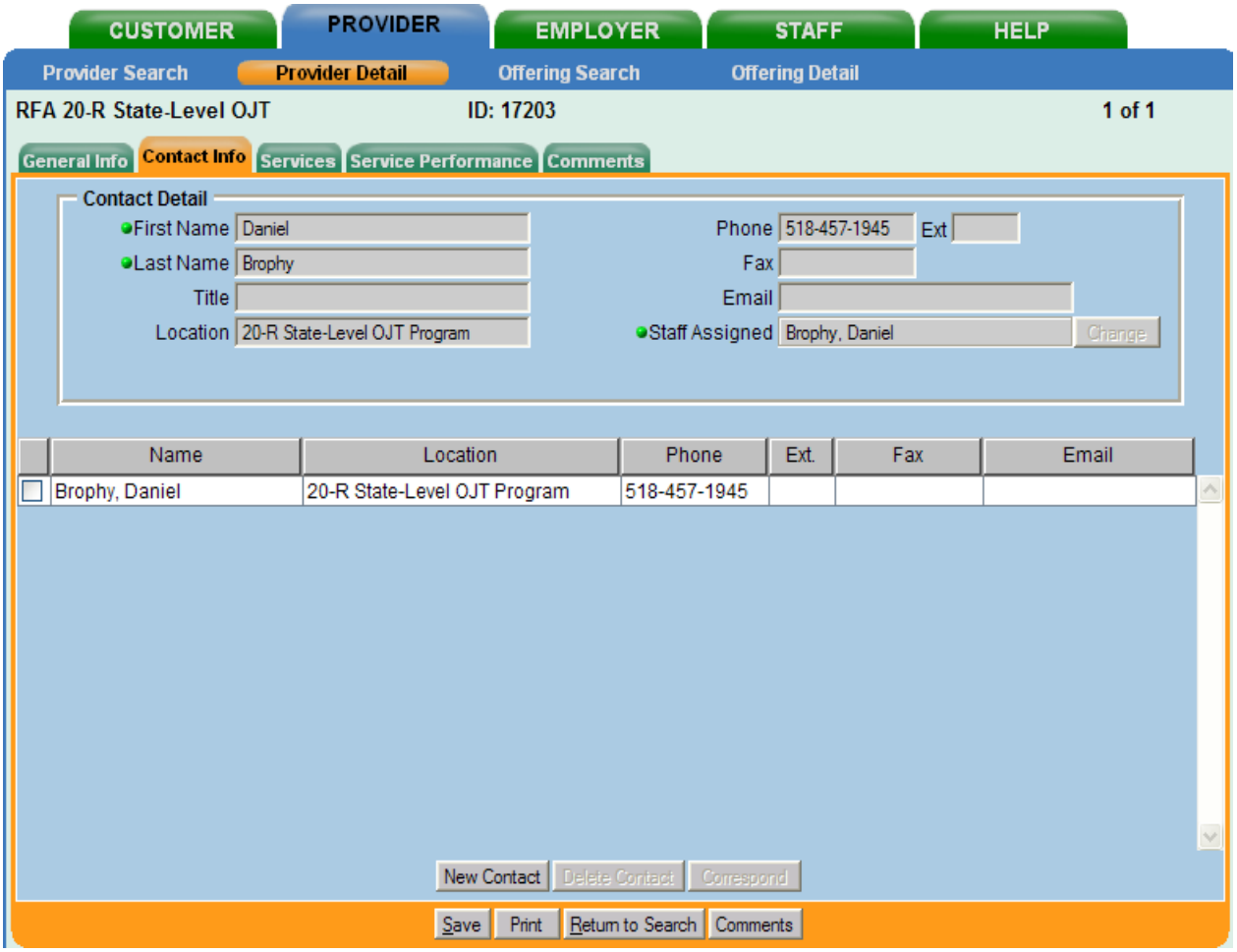


To add a new location click on the **New Location** button on the lower left of the location list box.

- Enter the provider's name in the Location Name field. For the "RFA 20-R State Level OJT" program the provider's location name will be the name of the OJT employer. This fields holds up to 80 characters (including spaces). Some statewide OJT employers located in the same city or town may need an additional identifier such as a street name under Location.
- Enter the provider (OJT employer's) street address under "Street Address (line 1)".
- Under "Street Address (line 2)" put the name and contact information of the employer contact person. This fields holds up to 80 characters (including spaces). For the RFA 20-R State-Level OJT program the provider's name & contact information (phone/fax/email) will be stored here. Avoid using separator's as much as possible (comma's, /, -). An example of contact information would be: Sue Smith (585) 319-7716 suesmith@ace.org.
- Complete the City/State/Zip Code & WIB fields. Click on **Save.**

Provider Module, Provider Detail Window – Contact Info Tab

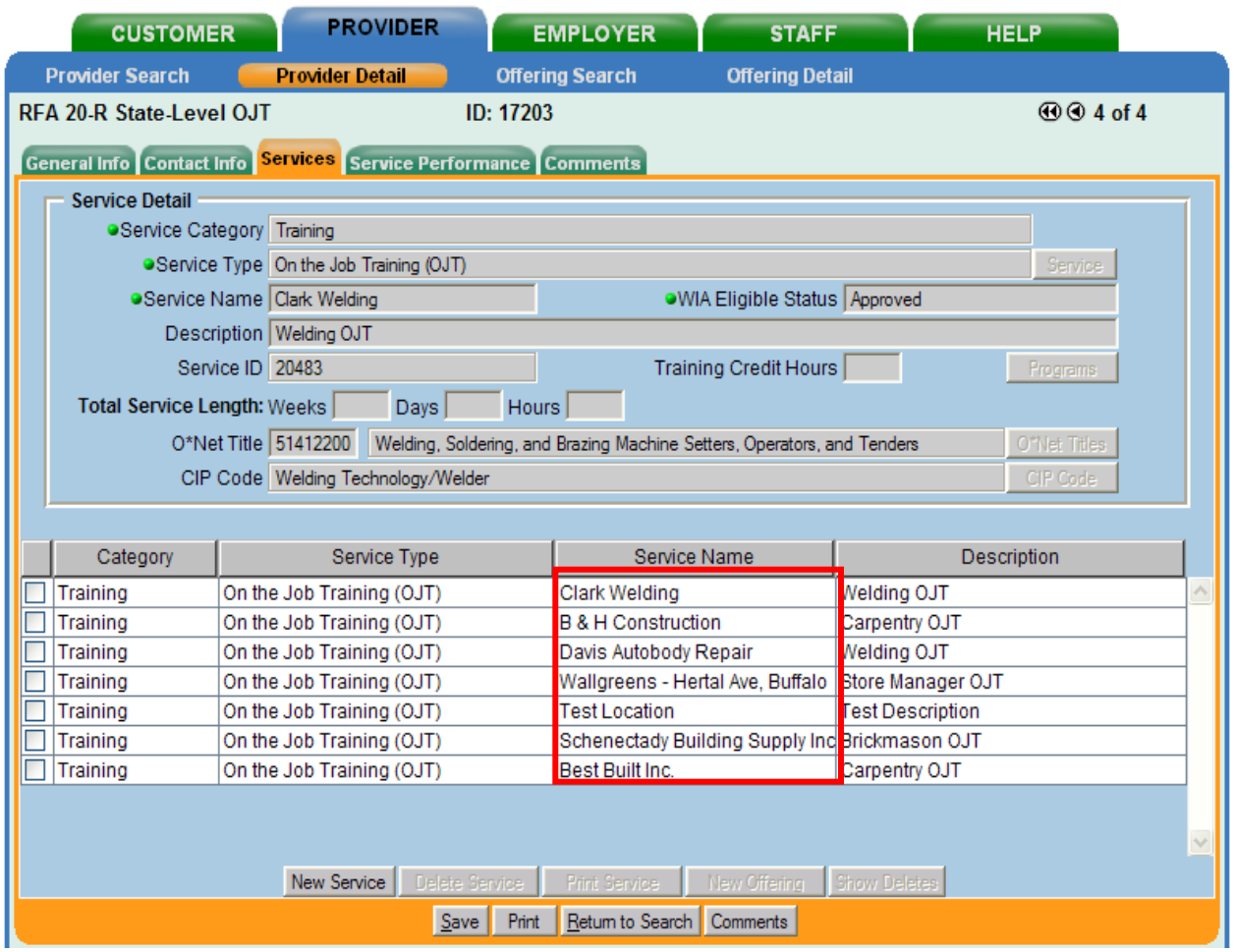
For the RFA 20-R State-Level OJT program Daniel Brophy has been designated as the contact person for the main provider record.
Staff can use the contact listed on the Provider Detail/General Info tab – ***Street Address (line 2)*** field, to keep track of their OJT employer's contact's information.
The **Contact Info tab** will not be used for updating provider contact information.



Chapter 2 – Provider Services

Provider Module, Provider Detail Window – Services Tab

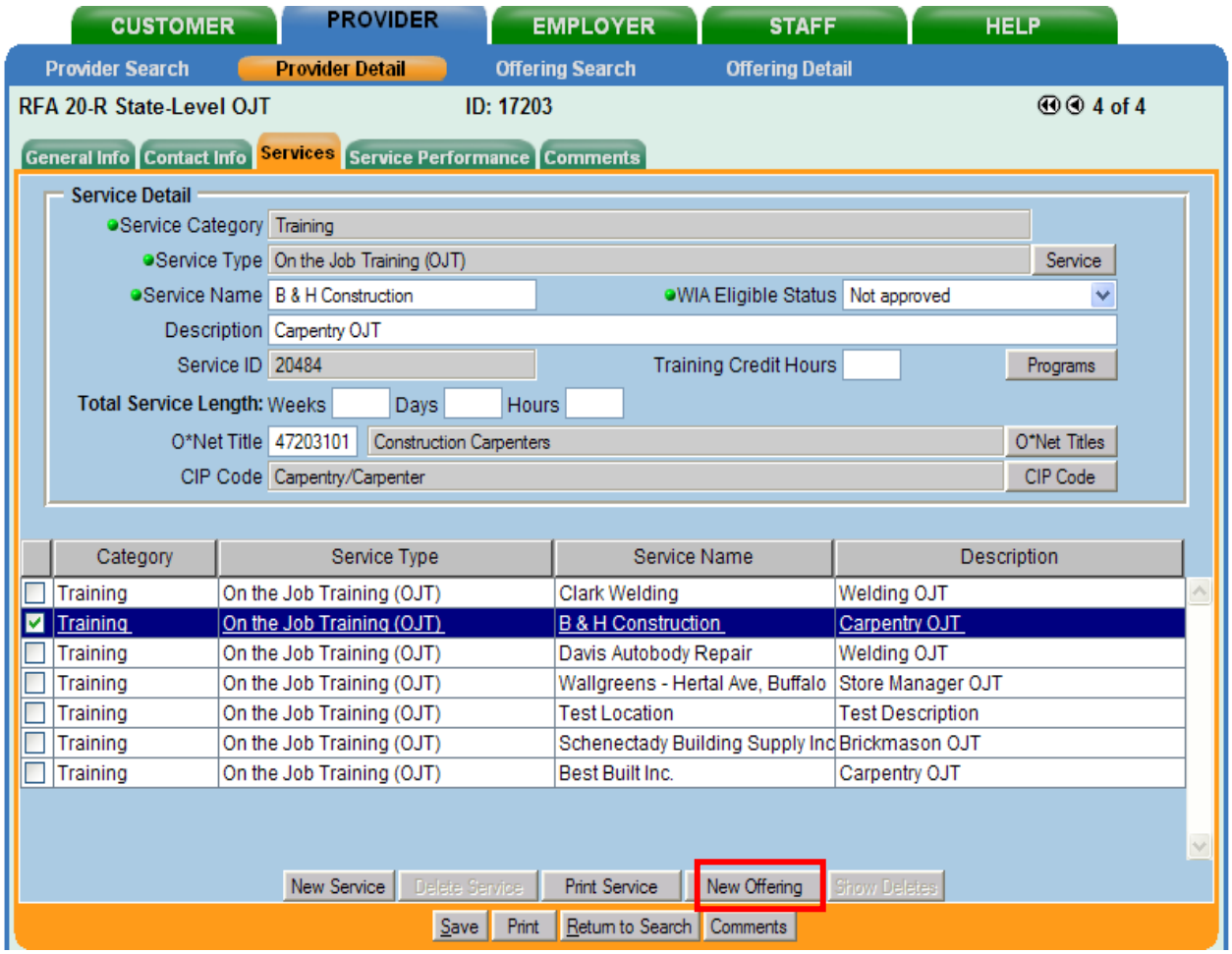
The ***Services*** tab is where all services a Provider offers are created and listed. One or more ***Offerings*** will need to be linked to each RFA 20-R State-Level OJT provider service.



Check to be sure the ***Service*** is not already listed. If it is, perform an **Offering Search** to be sure an ***Offering*** does not already exist. An Offering Search can be performed from the Offering Search Window using the provider's name to locate all of the offerings from the provider.

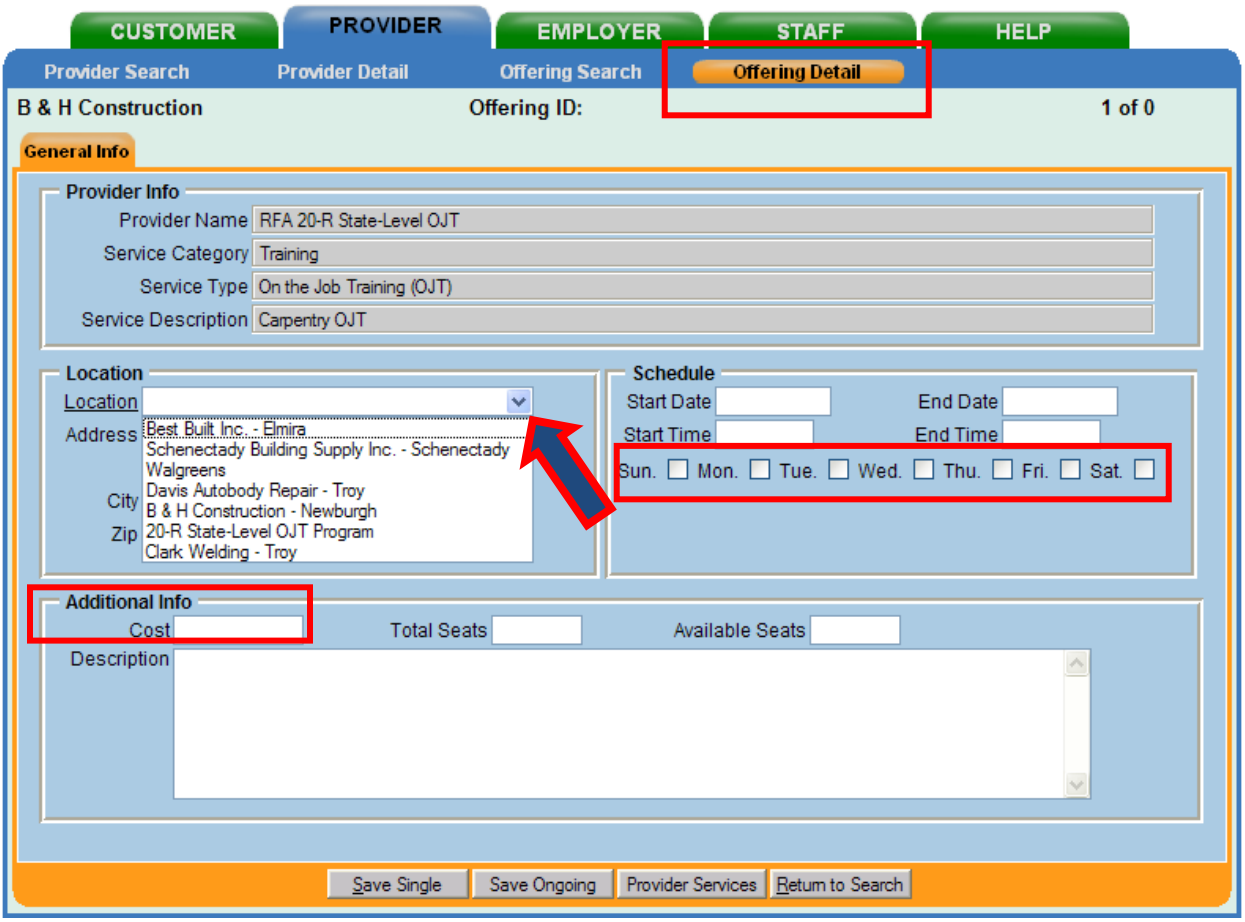
Provider Module, Provider Detail Window – Services Tab

After verifying that a specific ***Offering*** does not already exist highlight the ***Service*** by checking the box next to the Service and click on the **New Offering** button.



This will navigate you to the Offering Detail Window.

Provider Module, Offering Detail Window – General Info Tab



On the General Info tab of the Offering Detail Window:

In the **Location box**, use the Location drop-down menu to choose the OJT Provider Location to which the offering is being attached.

Do **not** enter Start and End Dates and Times in the **Schedule** box. Click on **at least one** day of the week in the Schedule box. In the **Additional Info** box, add “1” to the **Cost** field. Leave the **Total Seats** and **Available Seats** fields empty.

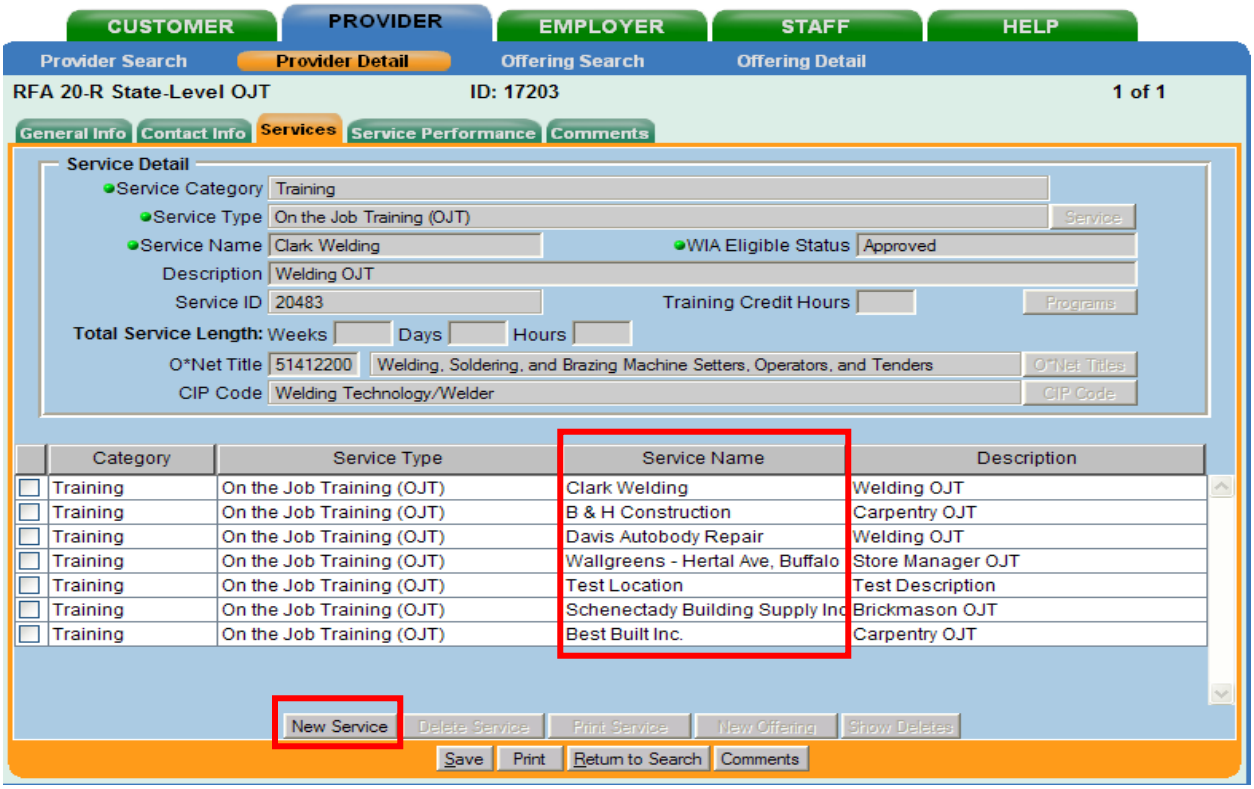
Click on the **Save Single** button on the lower left of the screen (**do not use Save Ongoing**). To return to the Provider Services screen, click on the **Provider Services** button. Repeat for the next Service, if needed.

Use the description field to provide appropriate information on the offering/OJT.

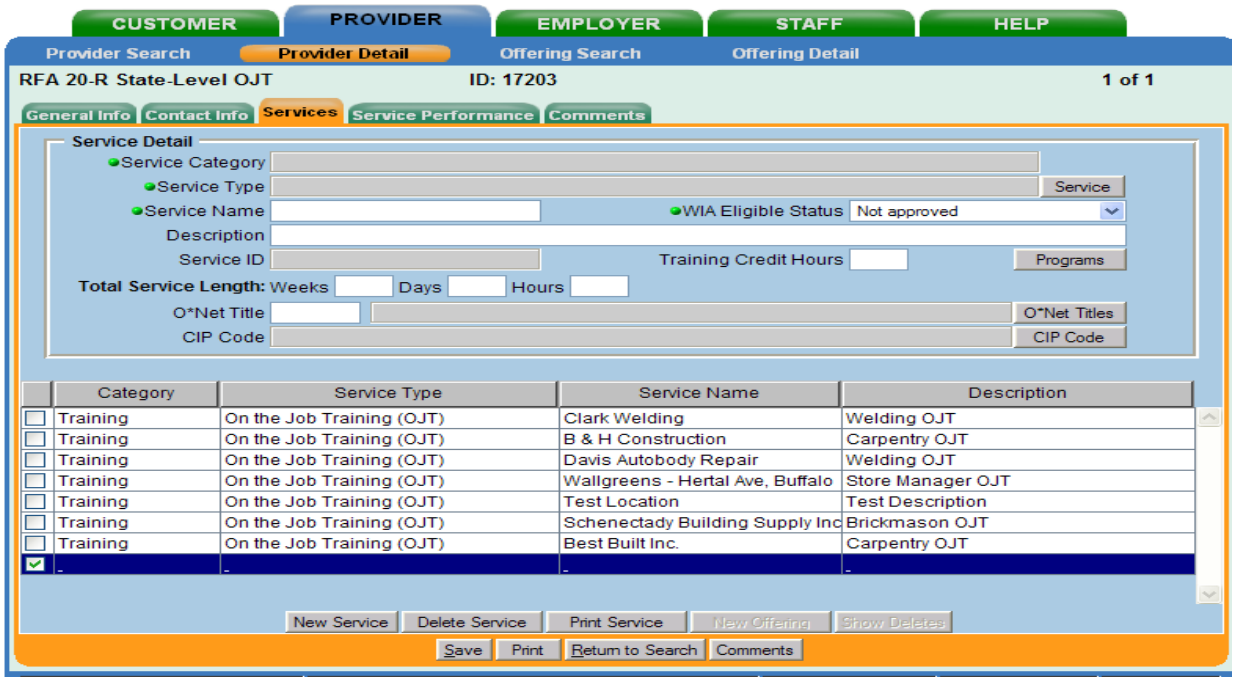
Chapter 2 – Provider Services

Provider Module, Provider Detail Window – Services Tab

If the OJT service **is not** listed, click on **New Service** on the lower left of the screen.

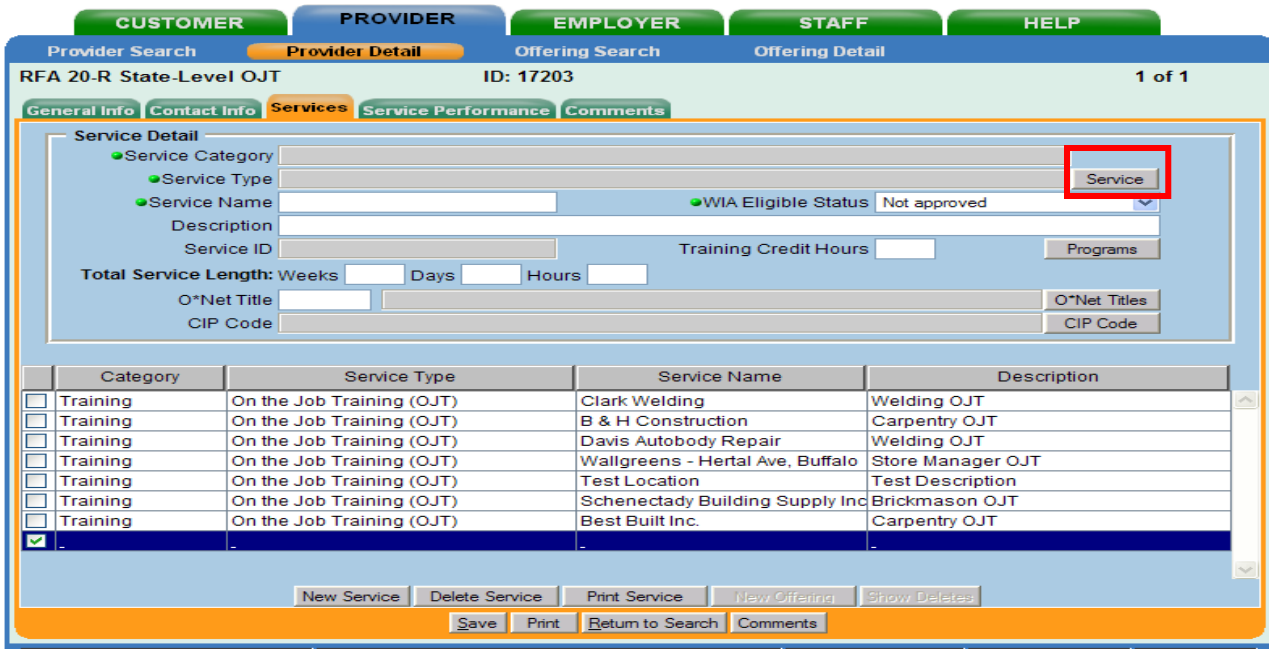


Green dots indicate required information.

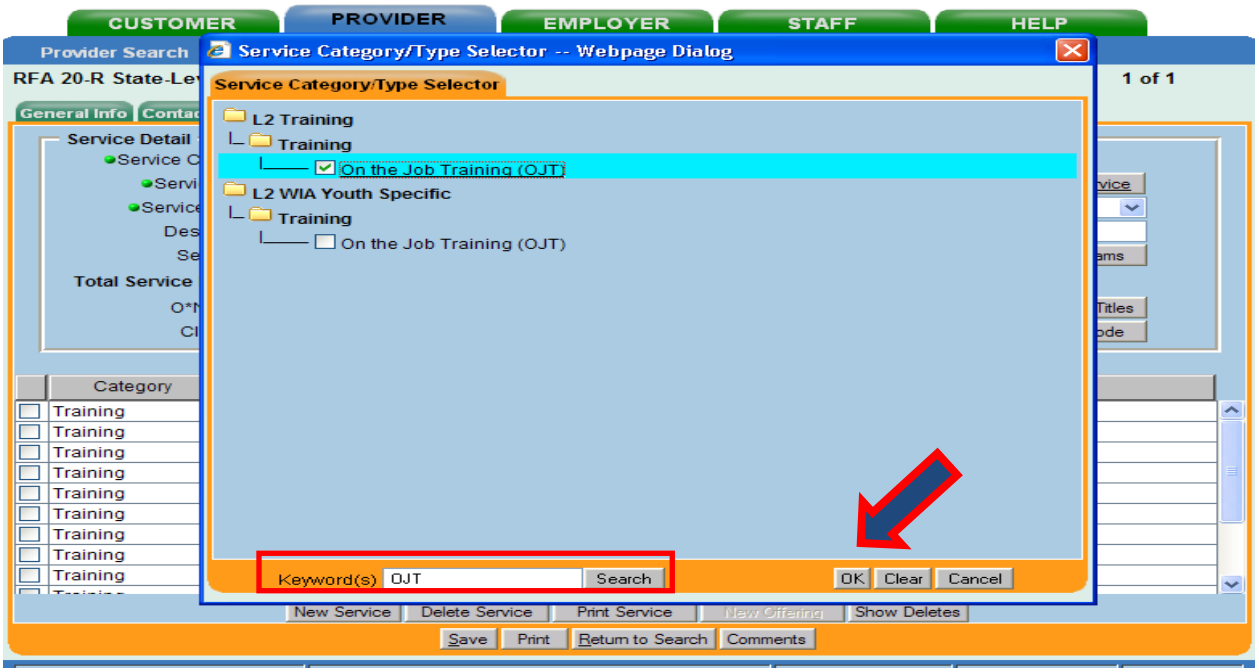


Chapter 2 – Provider Services

Provider Module, Provider Detail Window – Services Tab



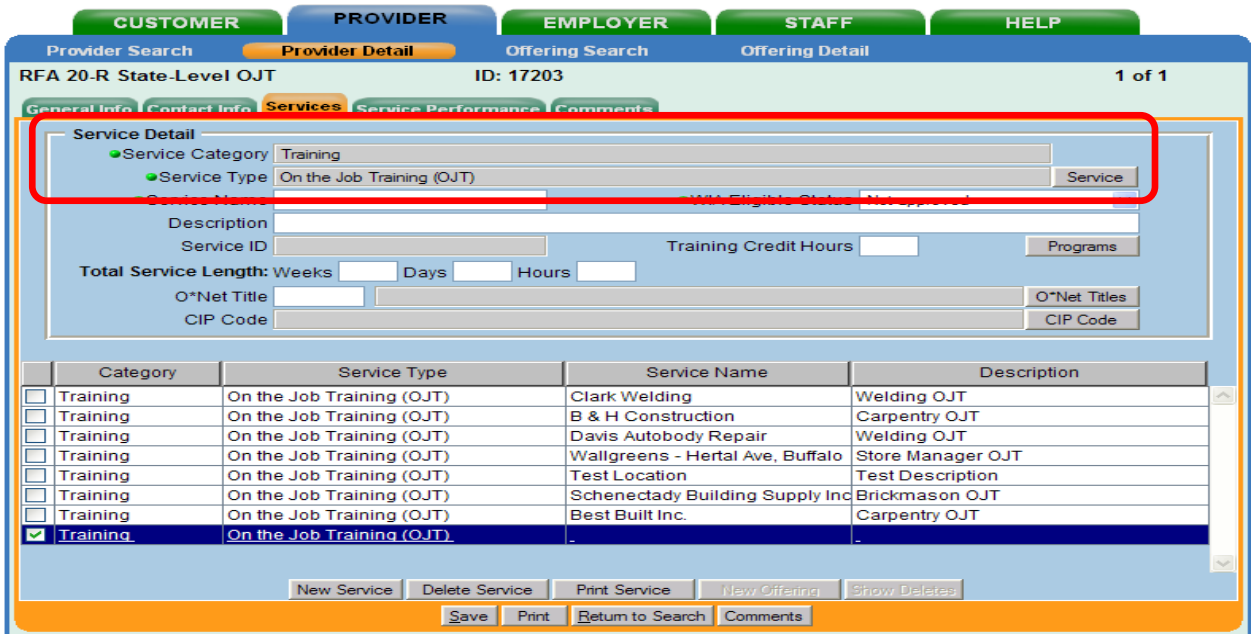
In the upper right of the **Service Detail** box, click on **Service**. This will open a dialog box called "**Service Category/Type Selector"**. You can use the Keyword(s) Search button or click on the L2 Training folder to locate the appropriate Service Category & Type. A Keyword(s) search in the example below using "OJT" as the keyword in the search box located the appropriate folder – "On the Job Training (OJT)".



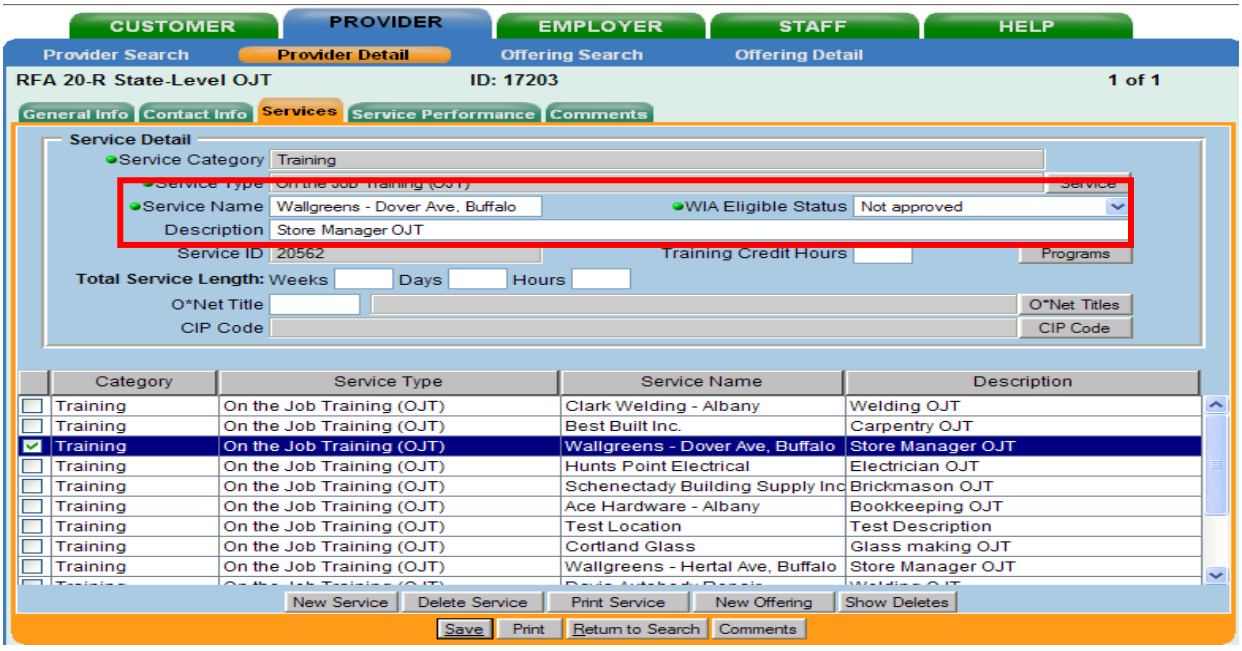
Chapter 2 – Provider Services

Provider Module, Provider Detail Window – Services Tab

Click on the appropriate **L2 Service Category & Type,** "On the Job Training (OJT)", and then click OK. This will populate both the Service Category and Service Type fields.

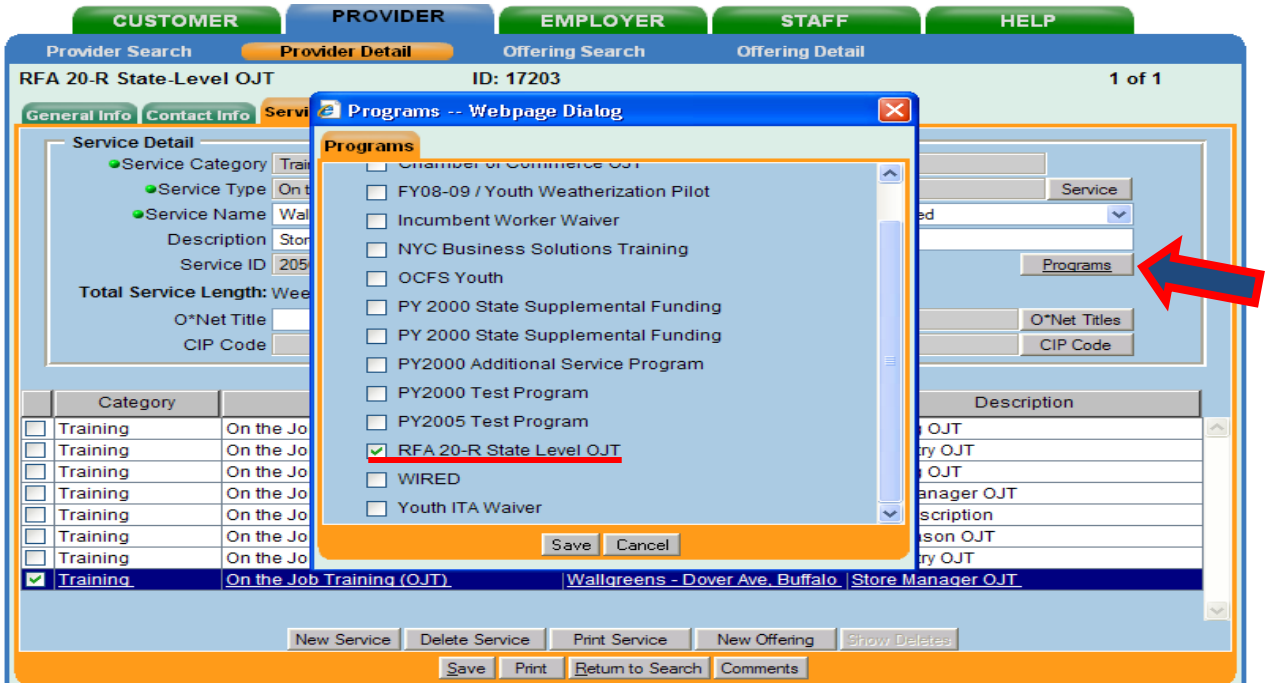


The **Service Name** will be the name of the OJT employer. In the example below the service name is "Wallgreens – Dover Ave, Buffalo" and the **Description** can be the type of OJT training (Carpentry, Welding, Brick Mason etc.), or it can be based on the employers description of the specific OJT program. Enter the service name and description in the appropriate fields. The WIA Eligible Status will remain "Not Approved".

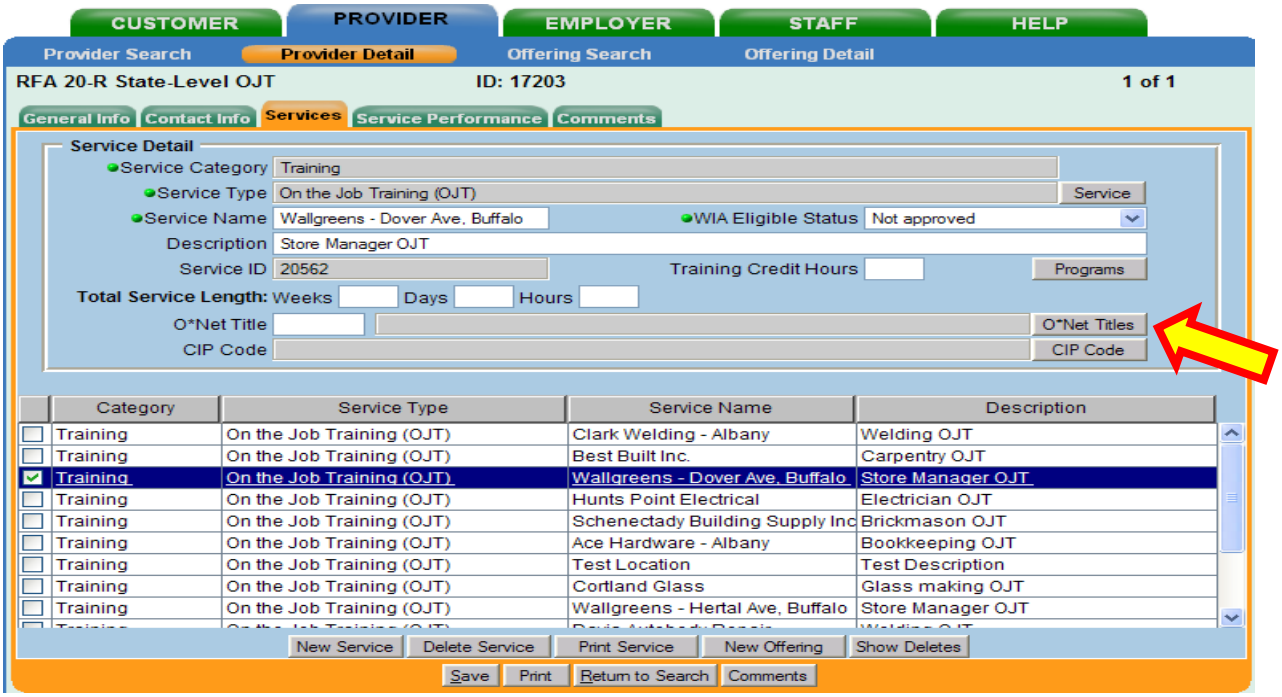


Provider Module, Provider Detail Window – Services Tab

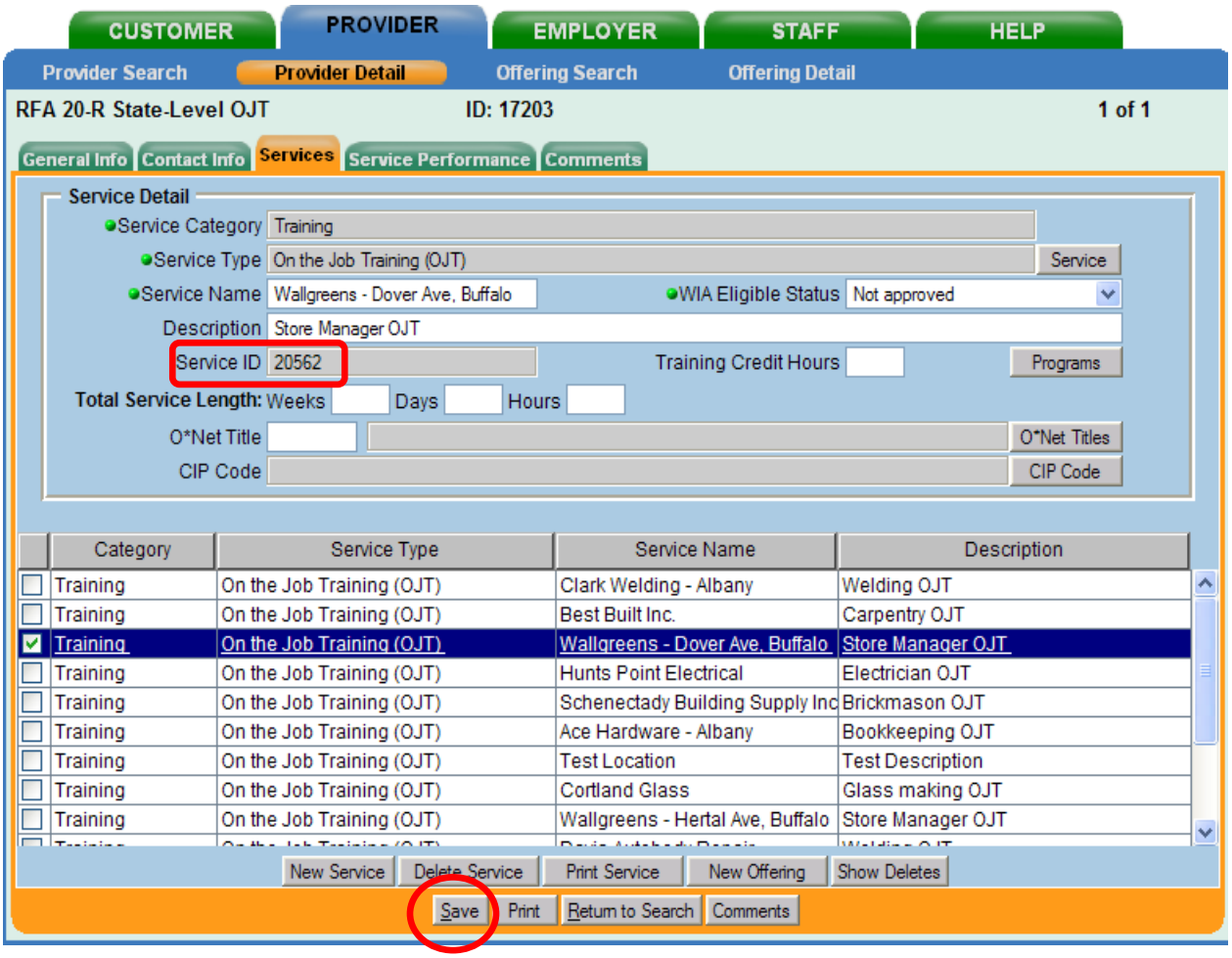
Next, click on the Programs button. This will open the "Programs – Webpage Dialog" box. Select "RFA 20-R State Level OJT" from the dialog box and hit the Save button on the dialog box. This will not populate any fields on this page.



Please Note: **Do not populate the O*Net Title on this page.**



Provider Module, Provider Detail Window – Services Tab



Click the **Save** button at the bottom of the window to save the service.

A “Record Saved” message will appear briefly in the top right portion of the window and a 5 digit **Service ID** number will be assigned to the new service by NYOSOS.

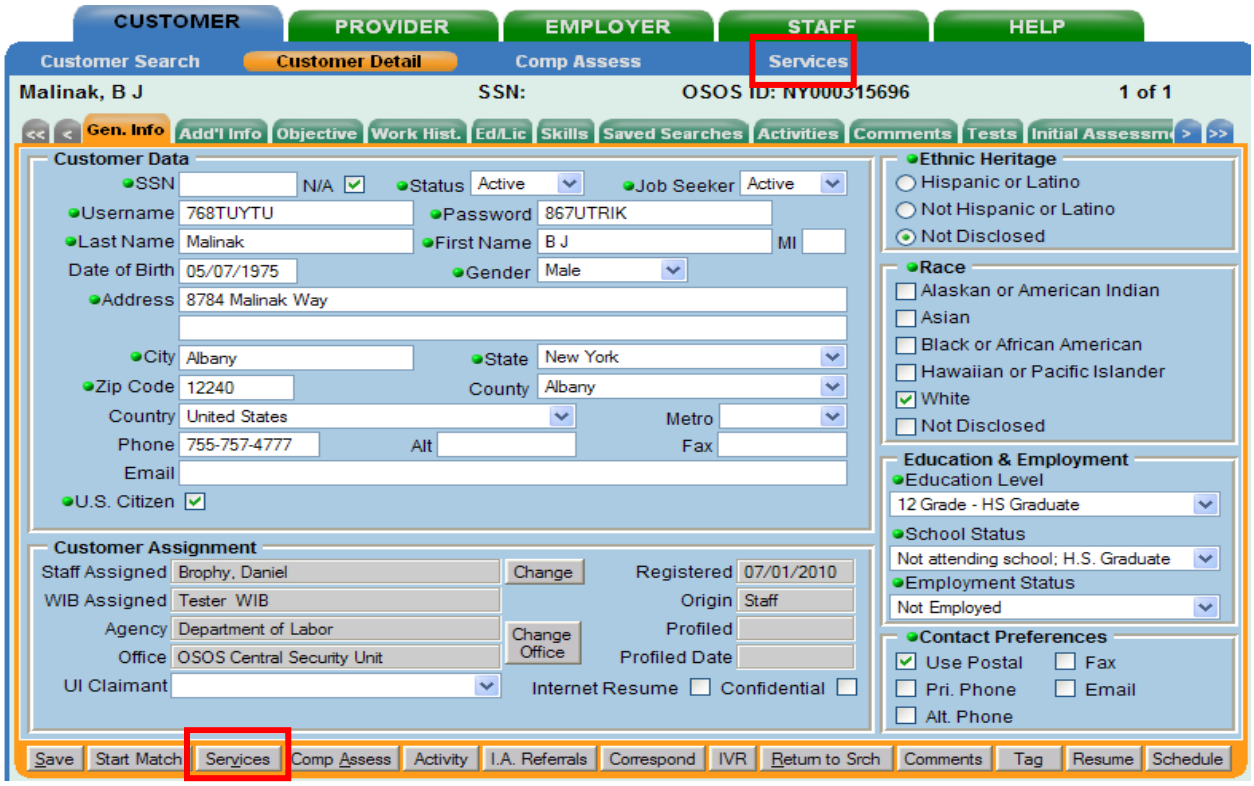
Chapter 3

Job Seeker/Customer Data Entry

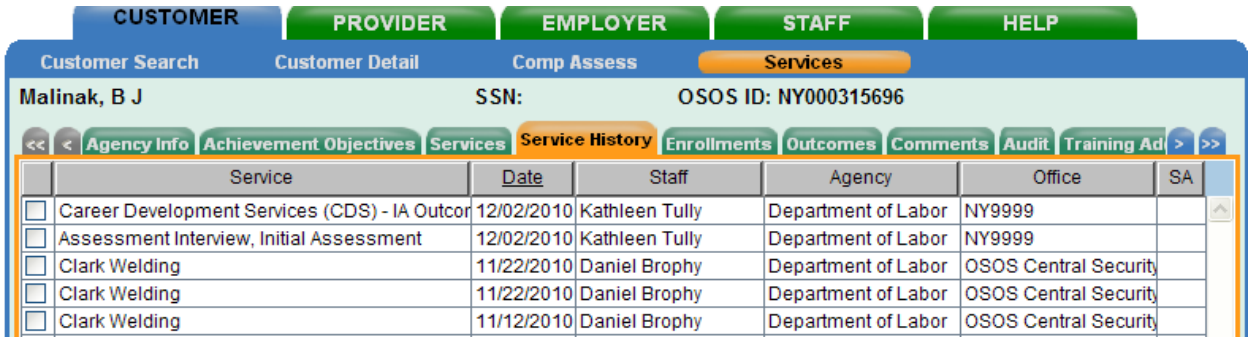
Any customers that are active and have services already recorded, must have their record reviewed prior to entering additional services.

- To review what has been provided.
- To avoid duplication.
- To better coordinate services.

From the Customer Module, Customer Detail Window navigate to the customer's Service History record on the Services Window by clicking on the **Services** button at the bottom of the window.



Review all of the customer's L1 & L2 services in the Service History tab.

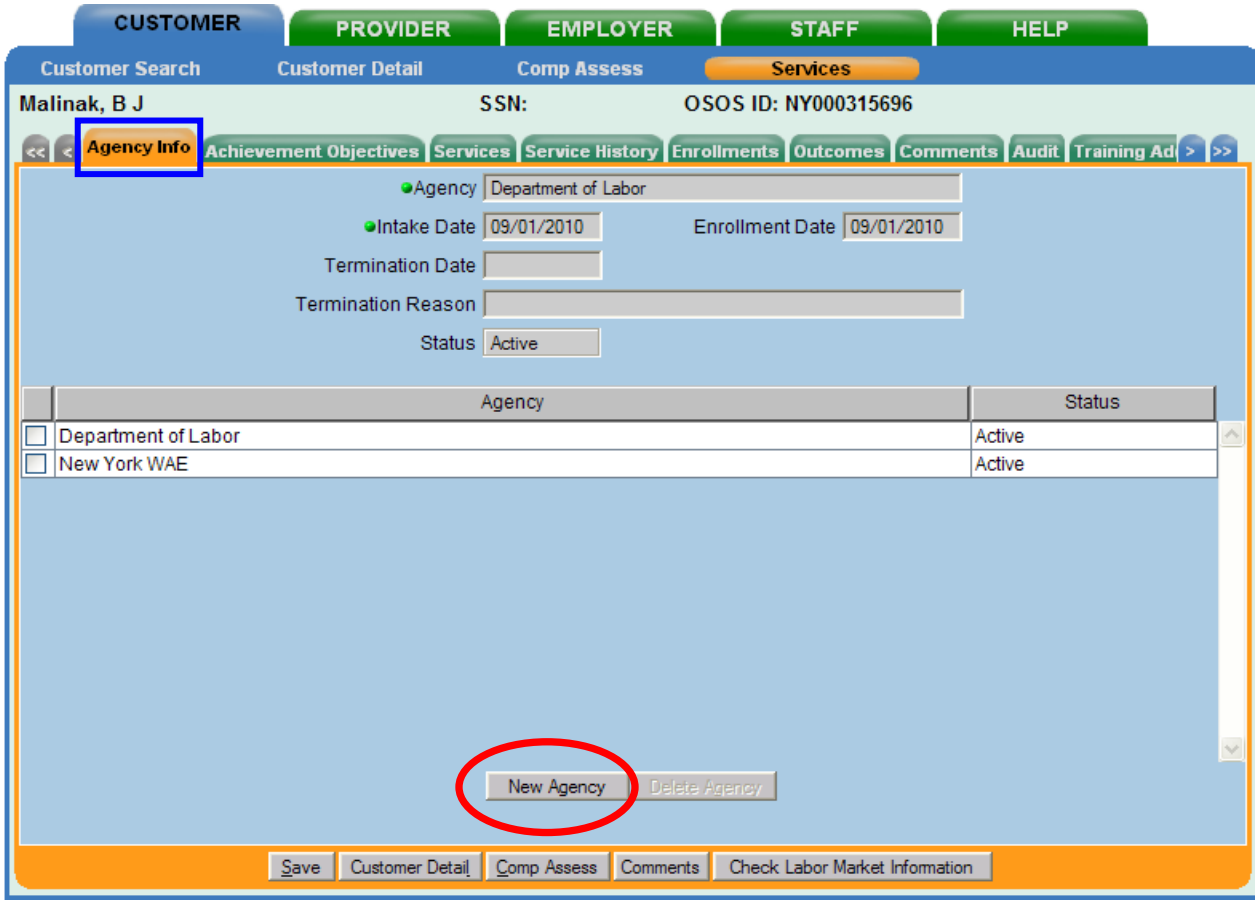


Service	Date	Staff	Agency	Office	SA
Career Development Services (CDS) - IA Outcor	12/02/2010	Kathleen Tully	Department of Labor	NY9999	
Assessment Interview, Initial Assessment	12/02/2010	Kathleen Tully	Department of Labor	NY9999	
Clark Welding	11/22/2010	Daniel Brophy	Department of Labor	OSOS Central Security	
Clark Welding	11/22/2010	Daniel Brophy	Department of Labor	OSOS Central Security	
Clark Welding	11/12/2010	Daniel Brophy	Department of Labor	OSOS Central Security	

Customer Module, Services Window – Agency Info Tab

The **Agency Info** tab shows what area or areas are working with the customer. A customer must be active in an agency, with an intake date and an enrollment date, in order for the enrollment data to be entered. The **Intake** and **Enrollment Dates** will be visible and the **Status** will be **Active**. Click the check box next to any listed agency to view the Intake and Enrollment Dates.

- **If the customer is active in your agency move to the Services tab**.
- If the customer is inactive in your agency you must make the customer active.



If your agency is listed as Inactive highlight it by clicking on the box next to the agency name. Remove the Termination Date & Termination Reason. Click on Save.

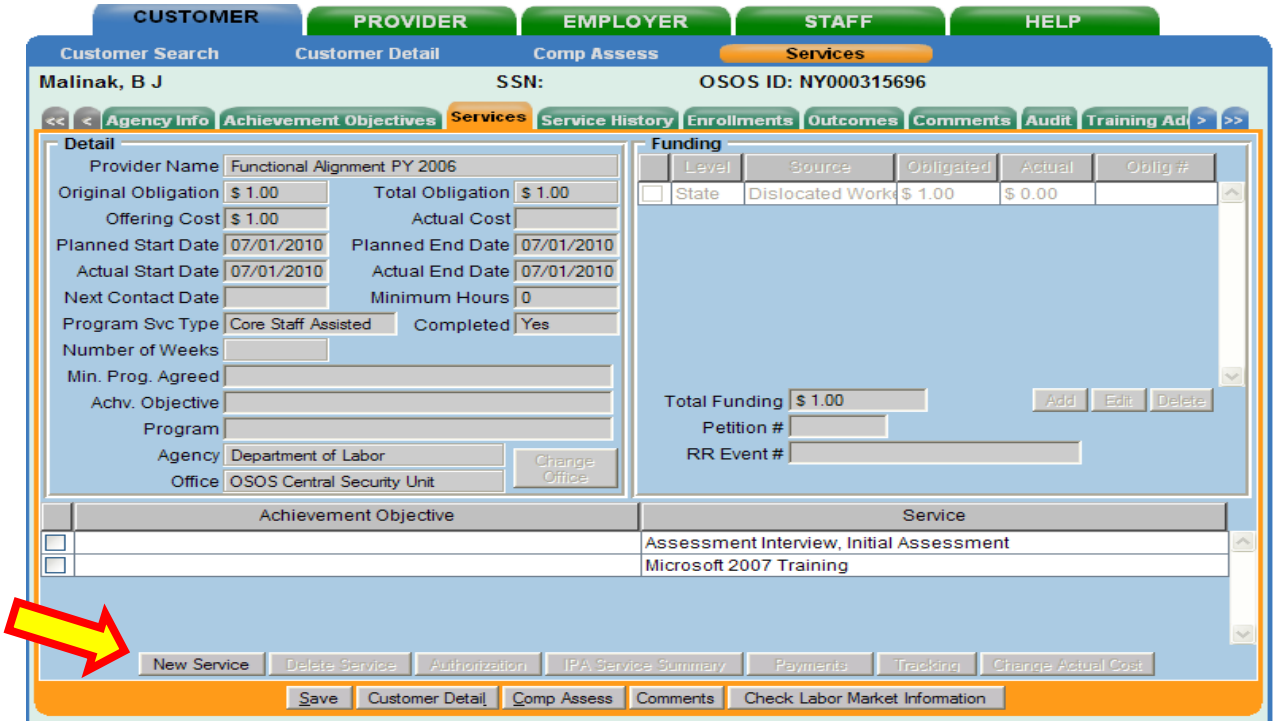
If your agency is not listed on the Agency Info tab click on the **New Agency** button at the bottom center of the screen. Select the appropriate area or Department of Labor from the Agency drop-down menu and enter the Intake and Enrollment dates. The Intake and Enrollment dates <u>are required</u> and the Status field must be Active for services to be entered. The Intake and Enrollment dates' format is mmddyyyy.

Click **Save** after entering data.

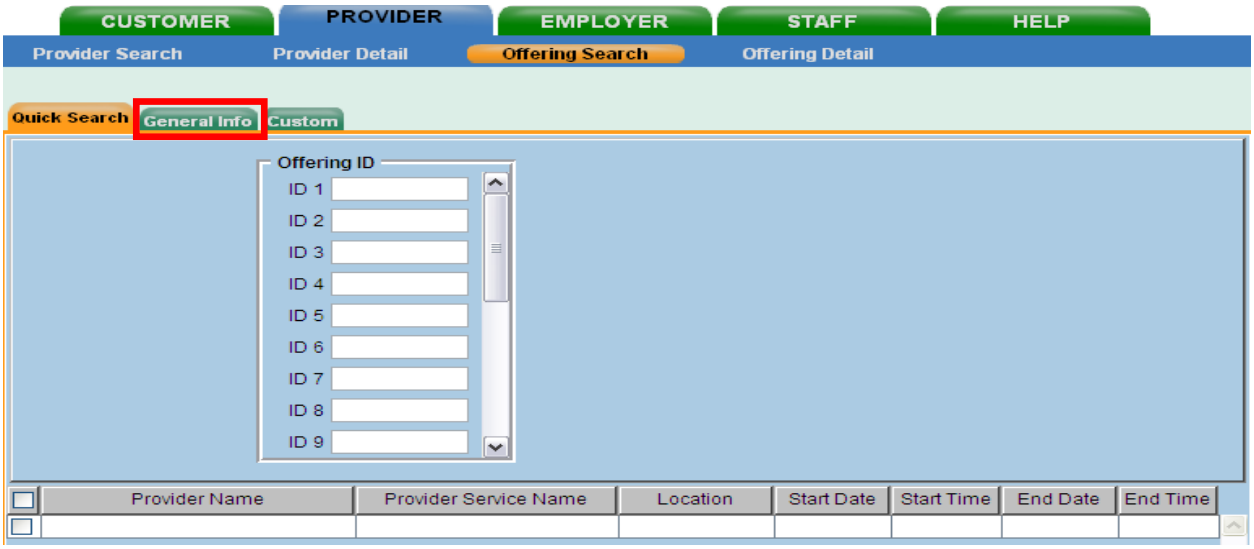
Chapter 3 – Job Seeker/Customer Data Entry

Customer Module, Services & Offering Search Windows

The Services tab of the Services Window will have a record of all L2 Services provided, or scheduled to be provided, to the customer. Click the **New Service** button to enter L2 services. You will be automatically directed to the **Offering Search** Window of the Provider module. The **Offering Search** Window is where a user searches for the appropriate L2 service to link to the customer.



On the **Offering Search** Window, click on the **General Info** tab. The Quick Search tab is not used in an offering search.

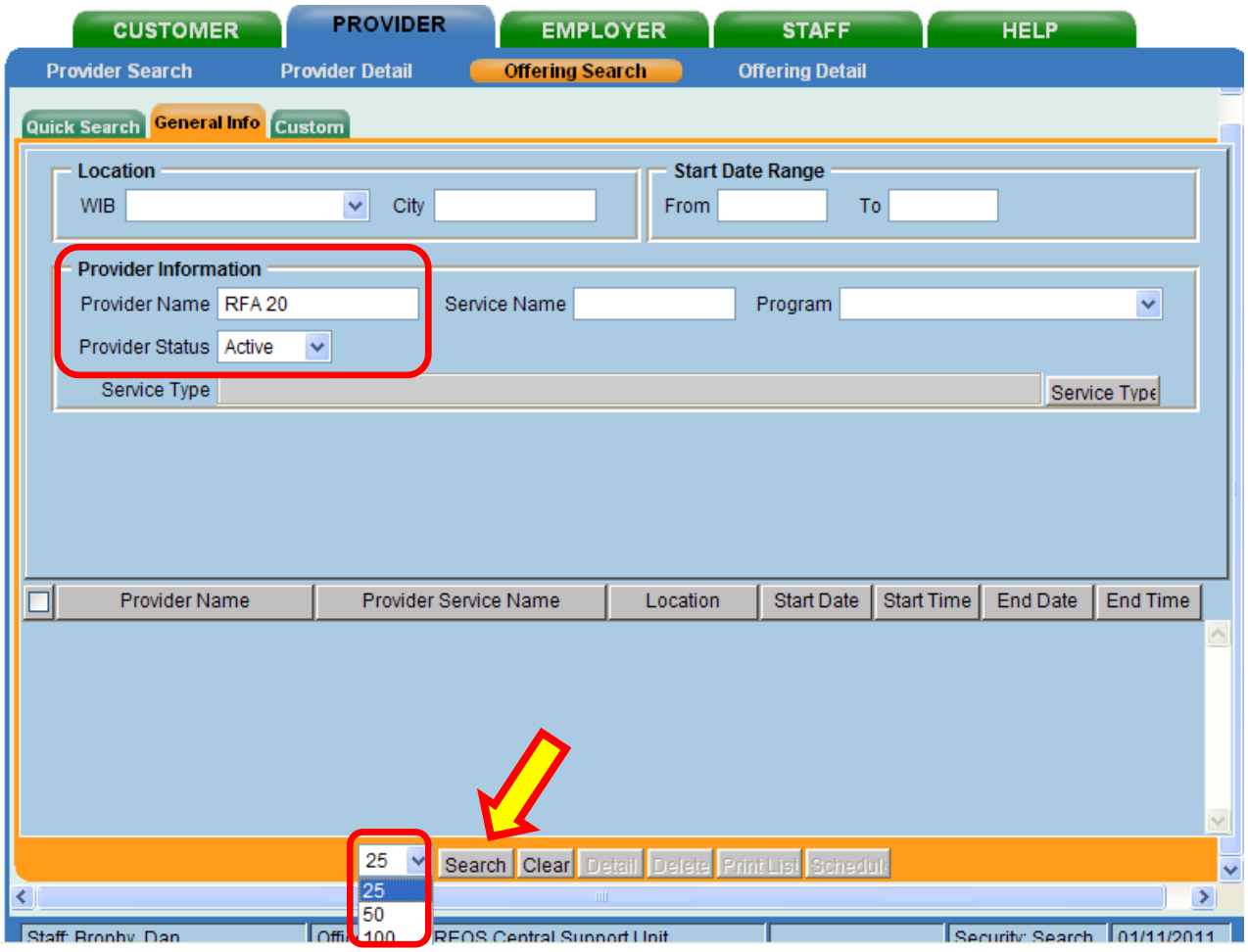


Provider Module, Offering Search Window – General Info Tab

The WIB field will automatically default to the area of the user. You should leave the WIB field blank since we have one statewide Provider for this program. Enter the first 5 characters of the provider's name in the Provider Name field: RFA 20.

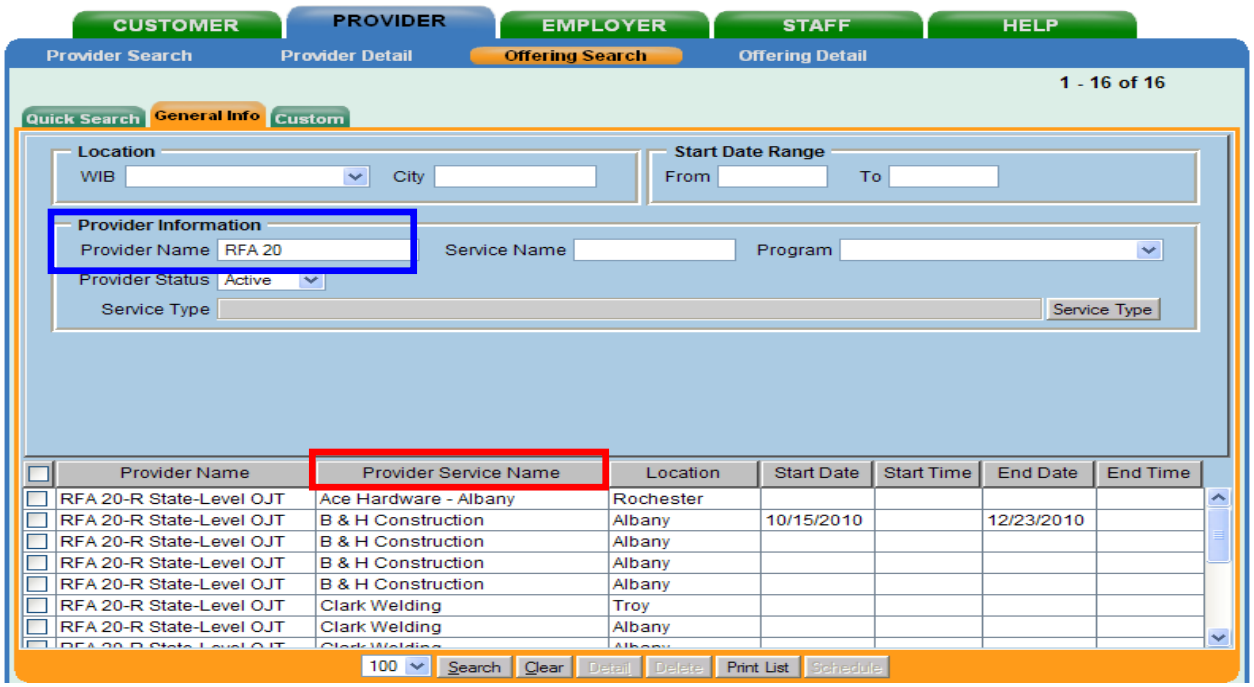
Click on the **Search** button. If the desired results do not appear, adjust the search parameters by using "RFA" in the Provider Name field and click on **Search** again.

The search will show how many total records are available and list the first 25, 50 or 100 records. The system default is 25 results but you can request 50 or 100 by changing the number prior to clicking **Search.**

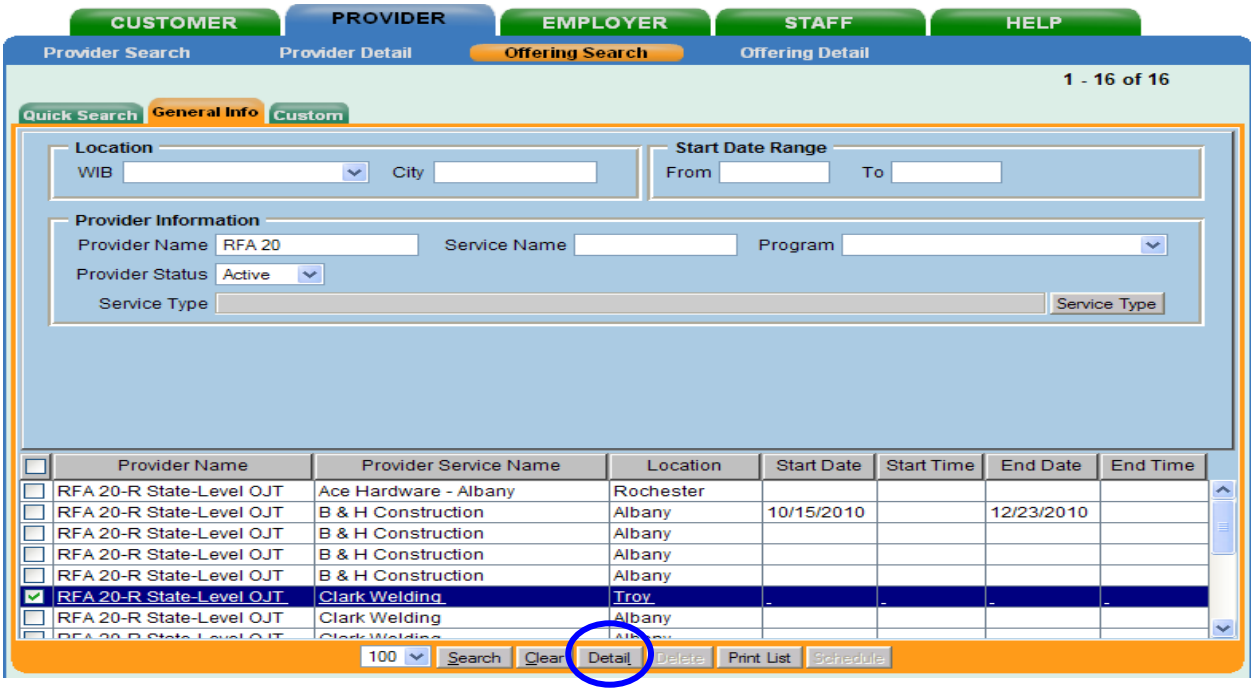


Provider Module, Offering Search Window – General Info Tab

The graphic below illustrates an example that returned search results using the first 5 characters of the provider's name as the search criteria, (RFA 20). You can sort the search results listing alphabetically by clicking on the Provider Service Name heading.



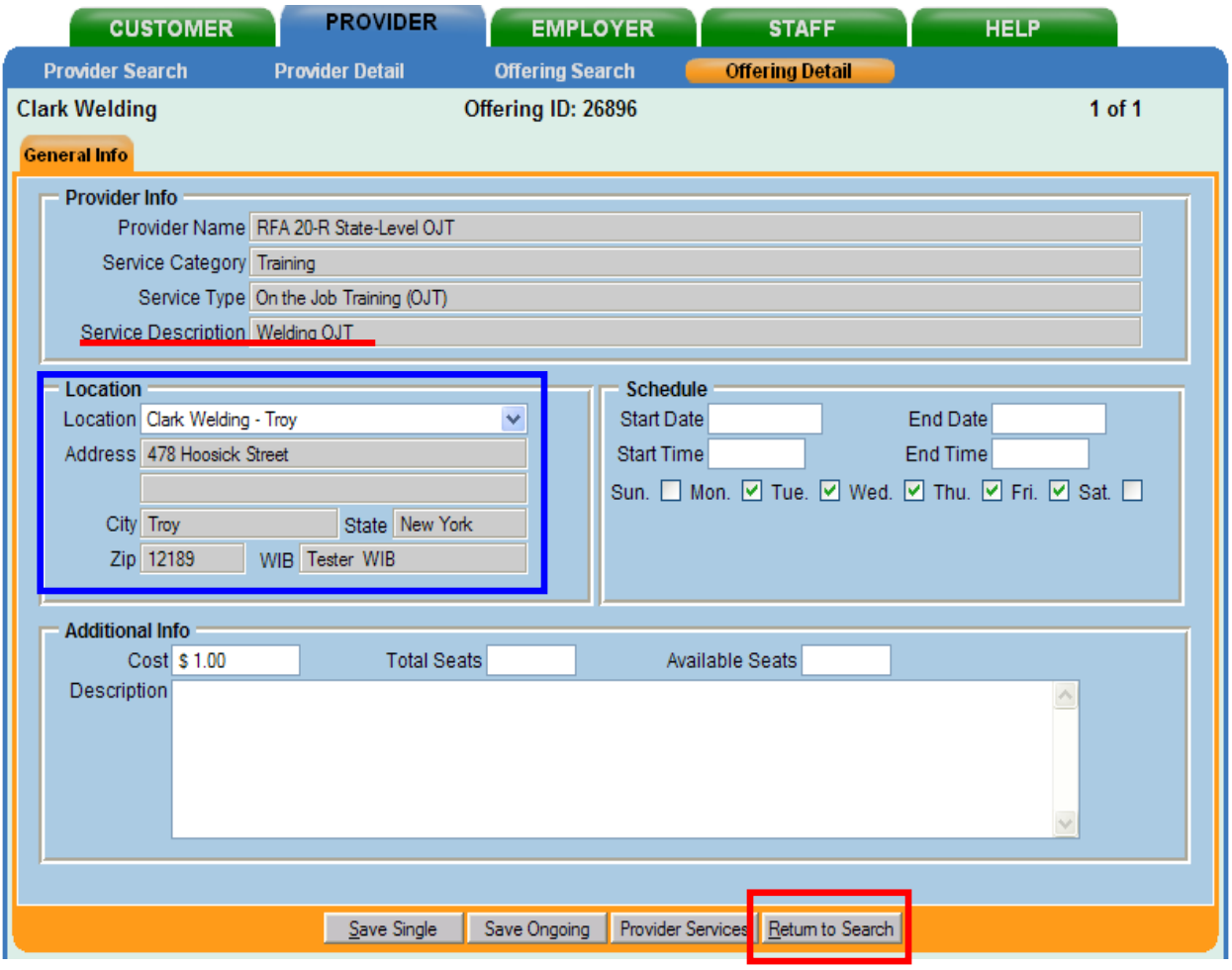
Highlight the appropriate service offering and click **Detail**



Provider Module, Offering Detail Window – General Info Tab

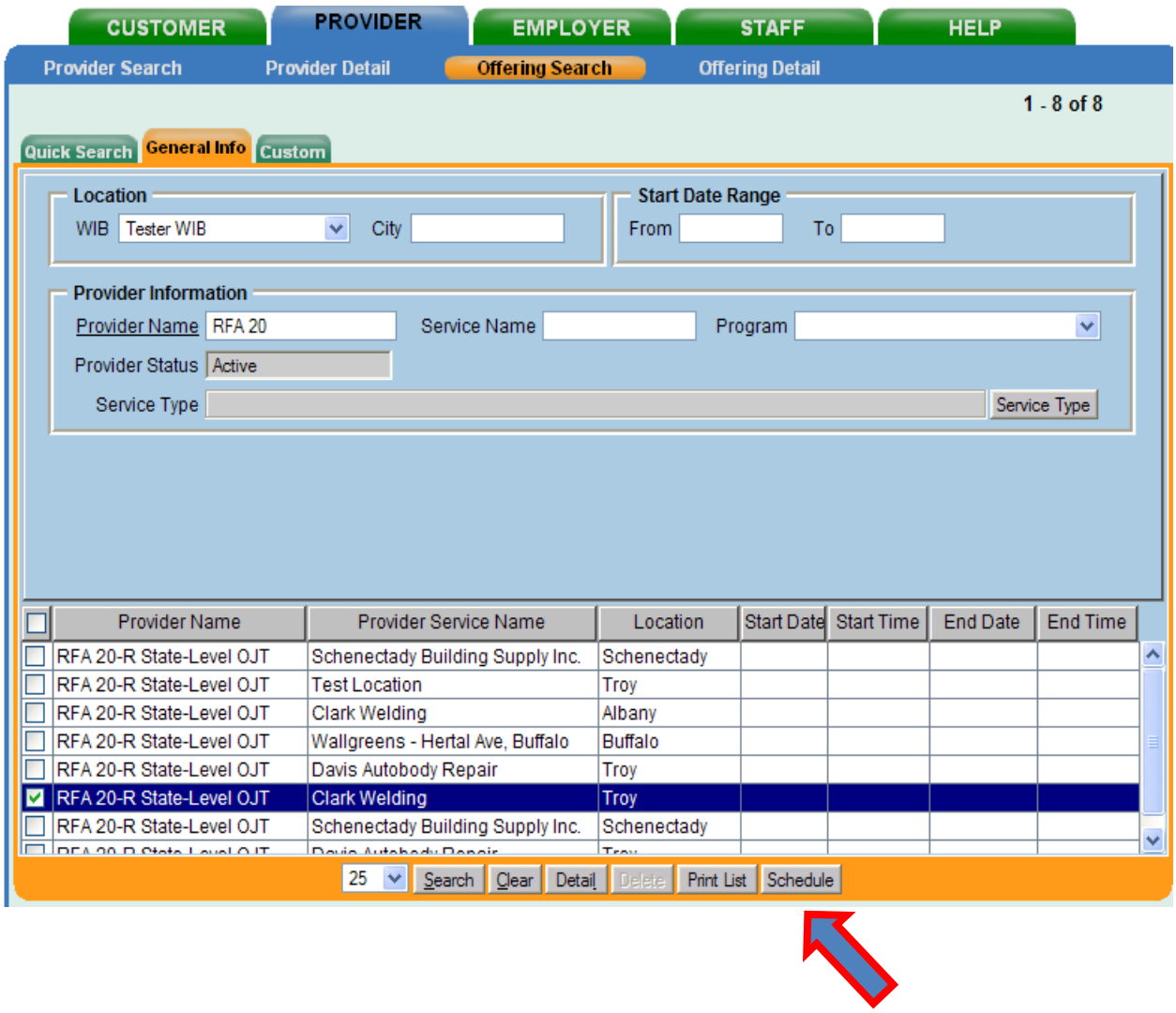
Review the **Offering Detail Record** to ensure that it is the correct offering in the correct location.

Click the **Return to Search** button after reviewing the offering to return to the Search Results list.

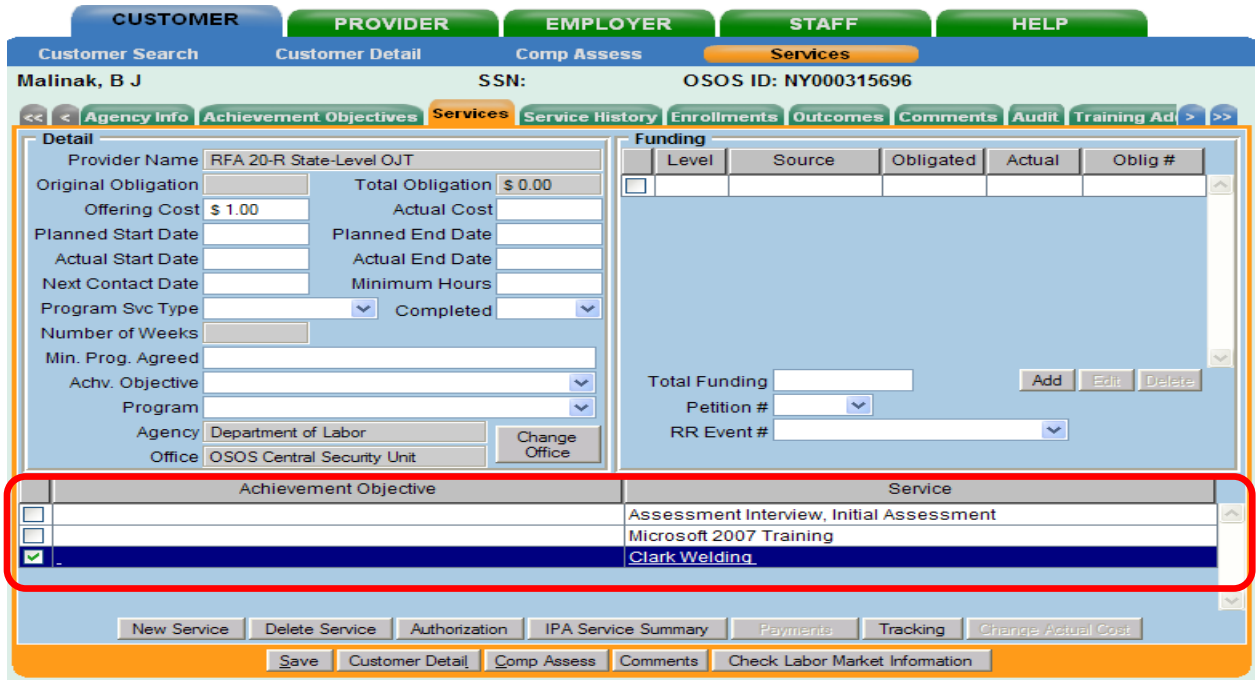


Provider Module, Offering Search Window – General Info Tab

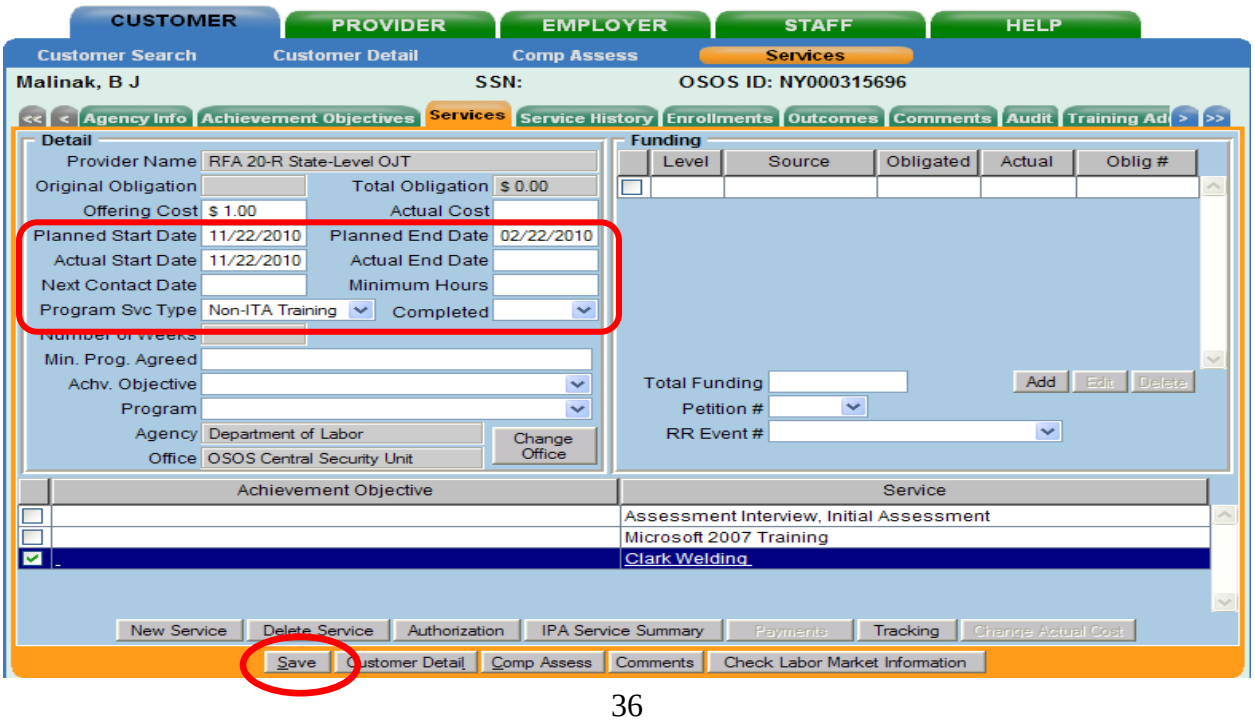
Click the **Schedule** button which will place the offering in the customer record in the Services tab.



Highlight the offering to activate the Detail section.

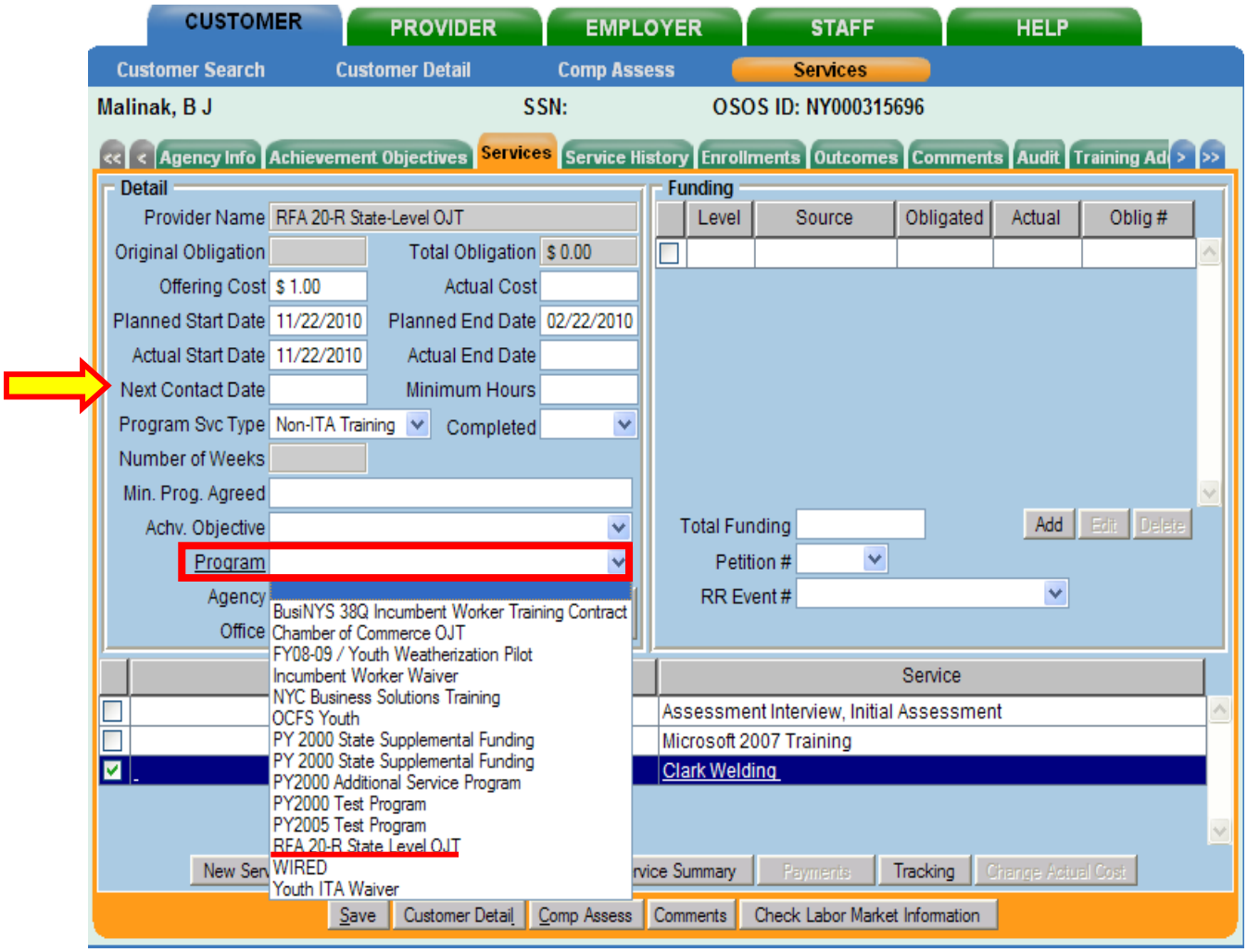


The following fields must be populated on the Services tab:
Planned Start Date (cannot be a greater date than the date of data entry)
Planned End Date
Actual Start Date (cannot be a greater date than the date of data entry)
Program Svc Type (drop-down) - **Non-ITA Training** for OJT programs.



Customer Module, Services Window, Services Tab

The training service must be linked to the Program. Click the Program drop-down arrow and highlight "**RFA 20-R State Level OJT"**.

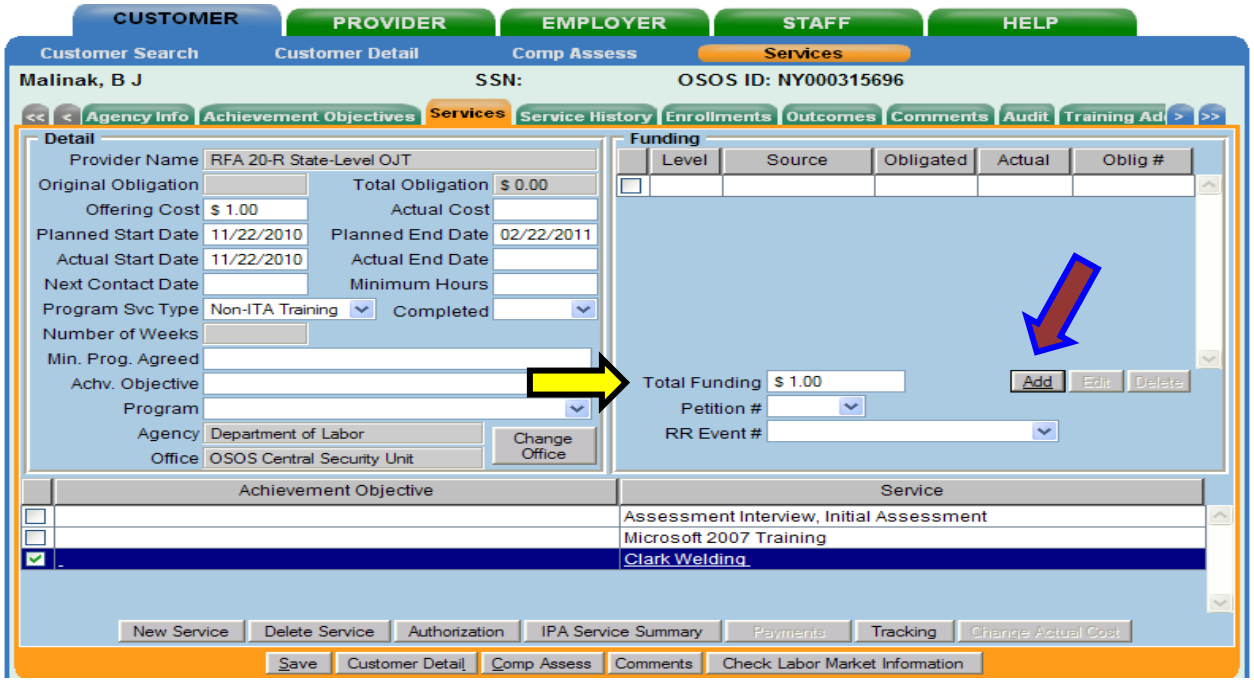


A useful tool, especially for customers in training situations, is the **Next Contact Date** field. Entering a date in this field will generate an Inbox notice to the staff person on that date, reminding them to contact the customer. Enter a formal date (mm/dd/yyyy).

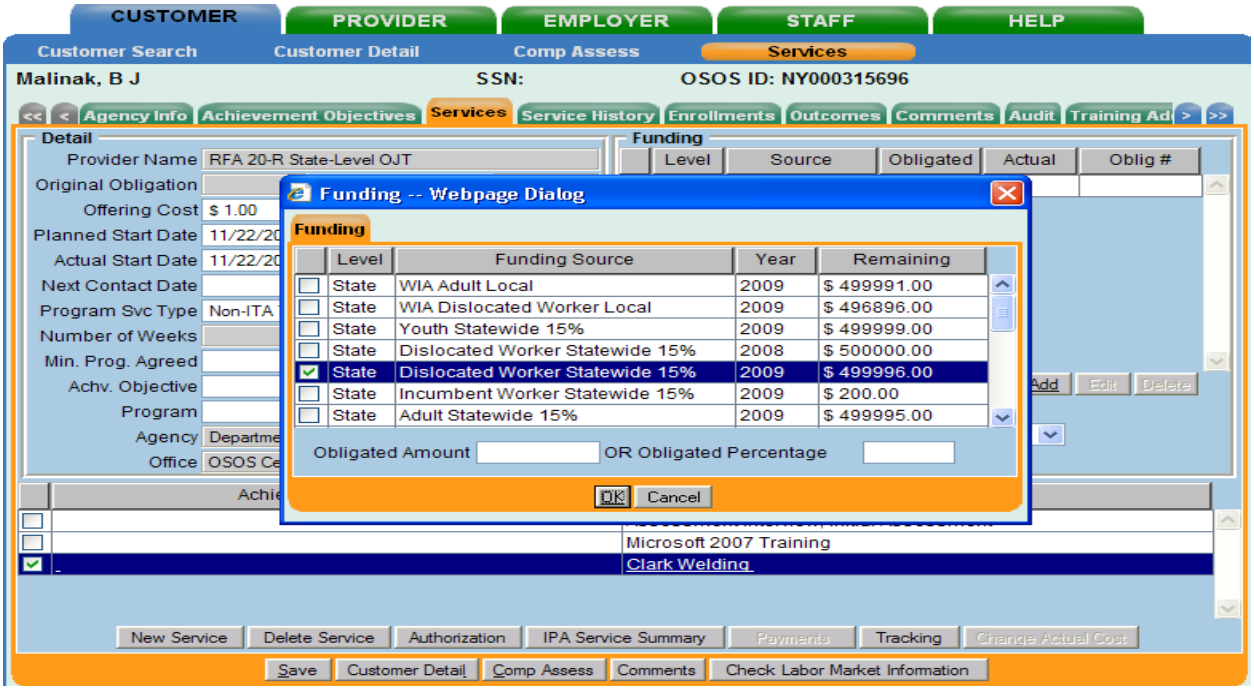
Click on **Save**.

Customer Module, Services Window, Services Tab

Enter $1 into the **Total Funding** and click on **Add.**

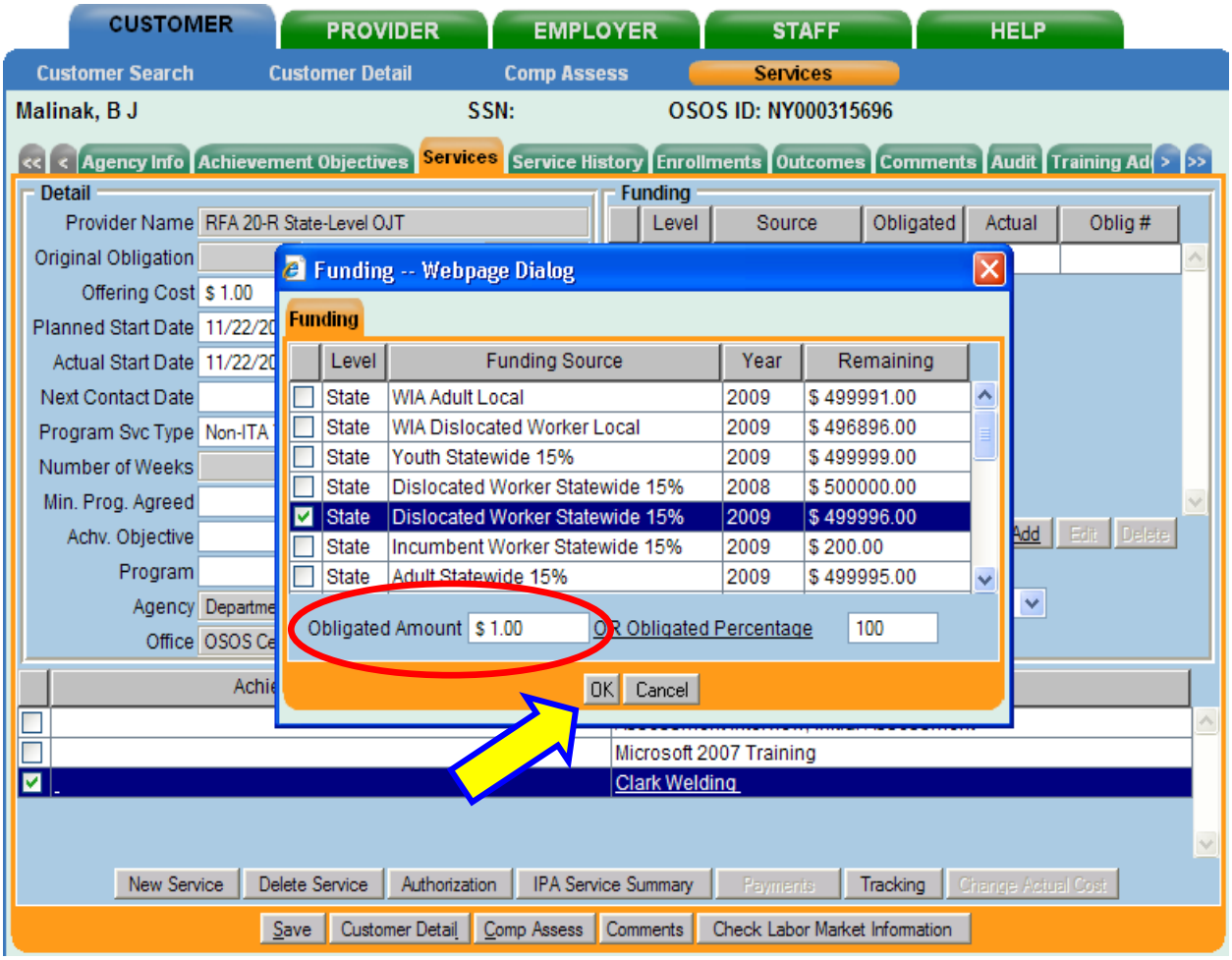


From the Funding – Webpage Dialog box check the box next to Dislocated Worker Statewide 15% fund.



Customer Module, Services Window, Services Tab

Add $1 to the **Obligated Amount** and click OK



Click OK.

The **Verification Webpage Dialog Box** will appear if:

A. There is no active WIA enrollment for the customer.

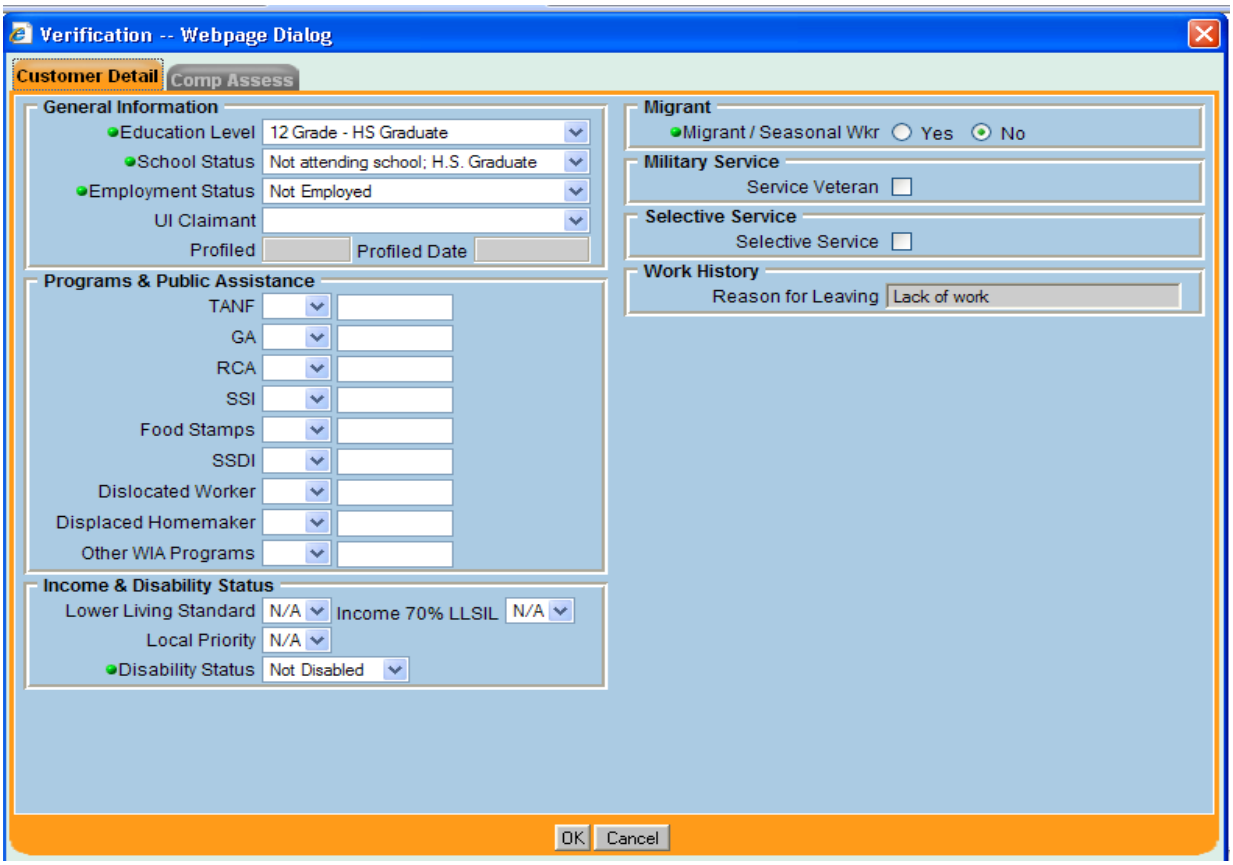
B. An existing active WIA SS/IO (Self Service/Information Only) enrollment is being changed to a WIA Staff Assisted enrollment.

Customer Module, Services Window, Services Tab

The **Verification Webpage Dialog Box** will allow you to verify the relevant data in the customer record is accurate at the time of enrollment prior to saving. It will also signify a need to:

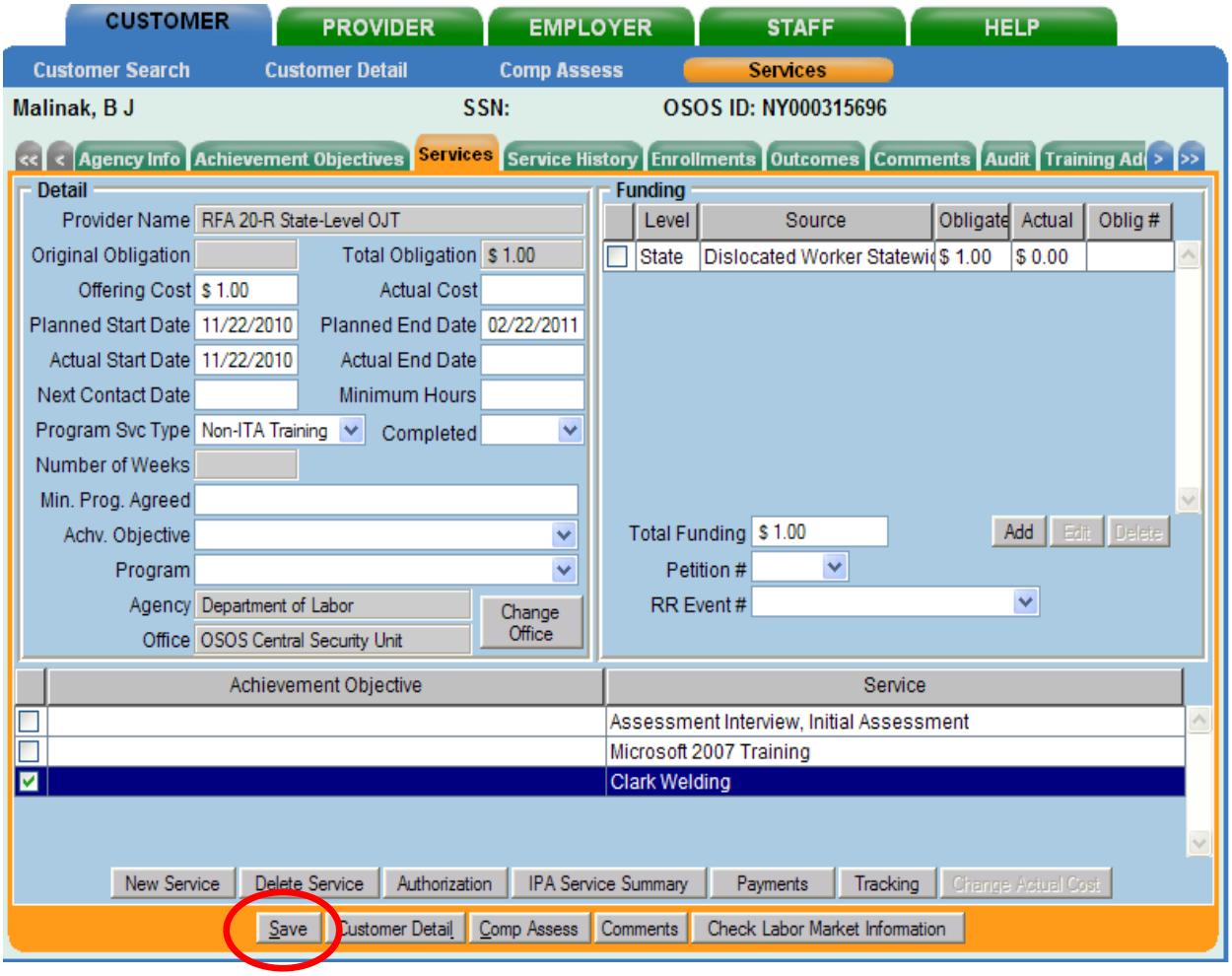
- Review Data Element Validation (DEV);
- Consider the need for an initial assessment; and
- Consider developing or revising an Individual Employment Plan (IEP).

Review the information for accuracy and correct, if necessary, within the Verification Webpage Dialog box. If the pertinent information is not known, or you are not sure if the data entry is correct, then click the "Cancel" button. This will stop the creation of the WIA enrollment and prevent the funding from being saved.



Please Note: Changes made in the Verification Webpage Dialog Box will also be saved on the customer's respective data entry screens after you click on the OK button.

Customer Module, Services Window, Services Tab



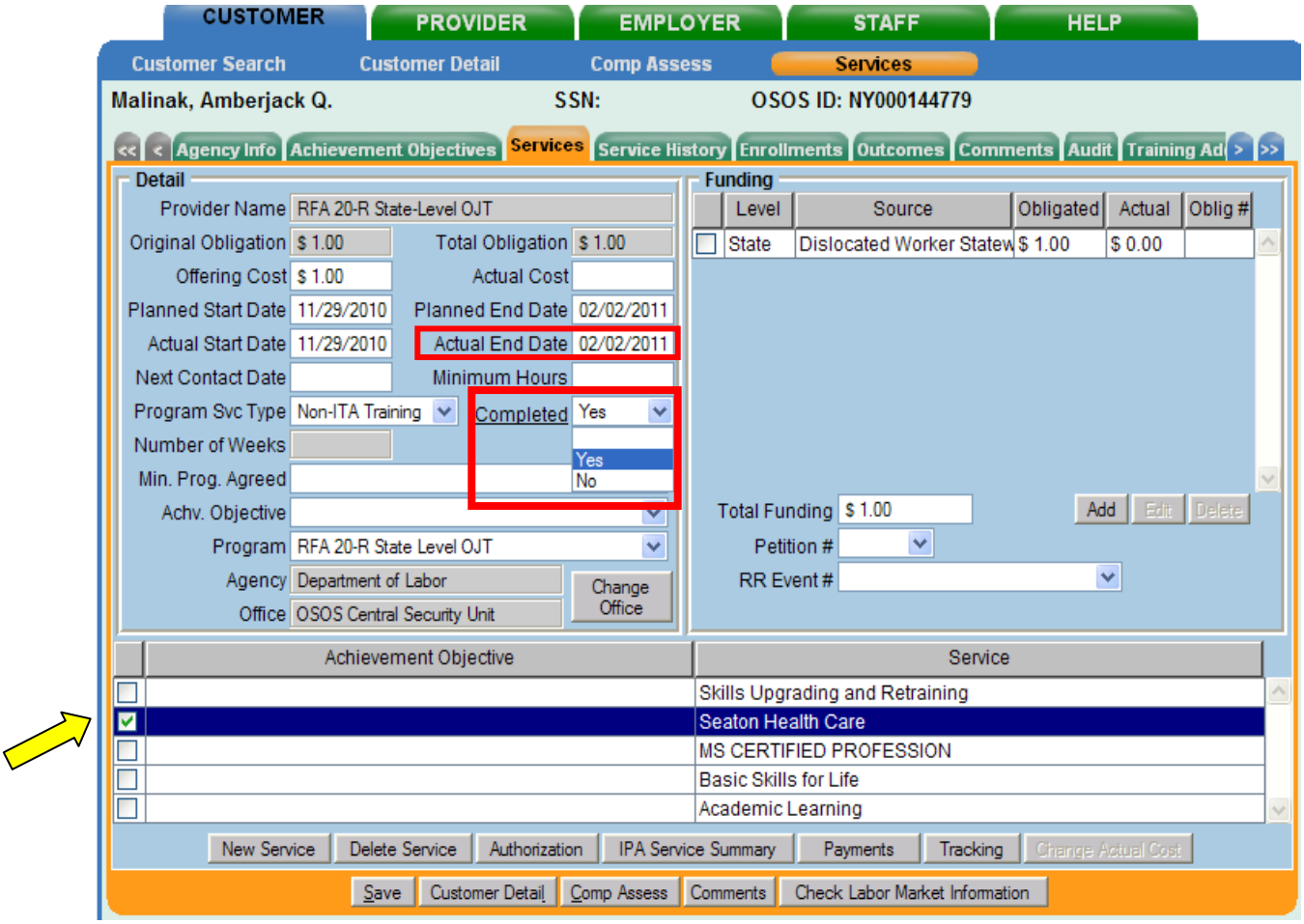
Click **Save**.

Chapter 3 – Job Seeker/Customer Data Entry

Customer Module, Services Window, Services Tab

<u>Ending a service</u>

To record that a service has ended, click on the service to highlight it in the column field and add the **Actual End Date.** Choose **Yes** or **No** from the **Completed drop-down field**. Click on **Save**.



If there are multiple services to be closed in the same record, the process can be completed for each service in the same manner before clicking the **Save** button.

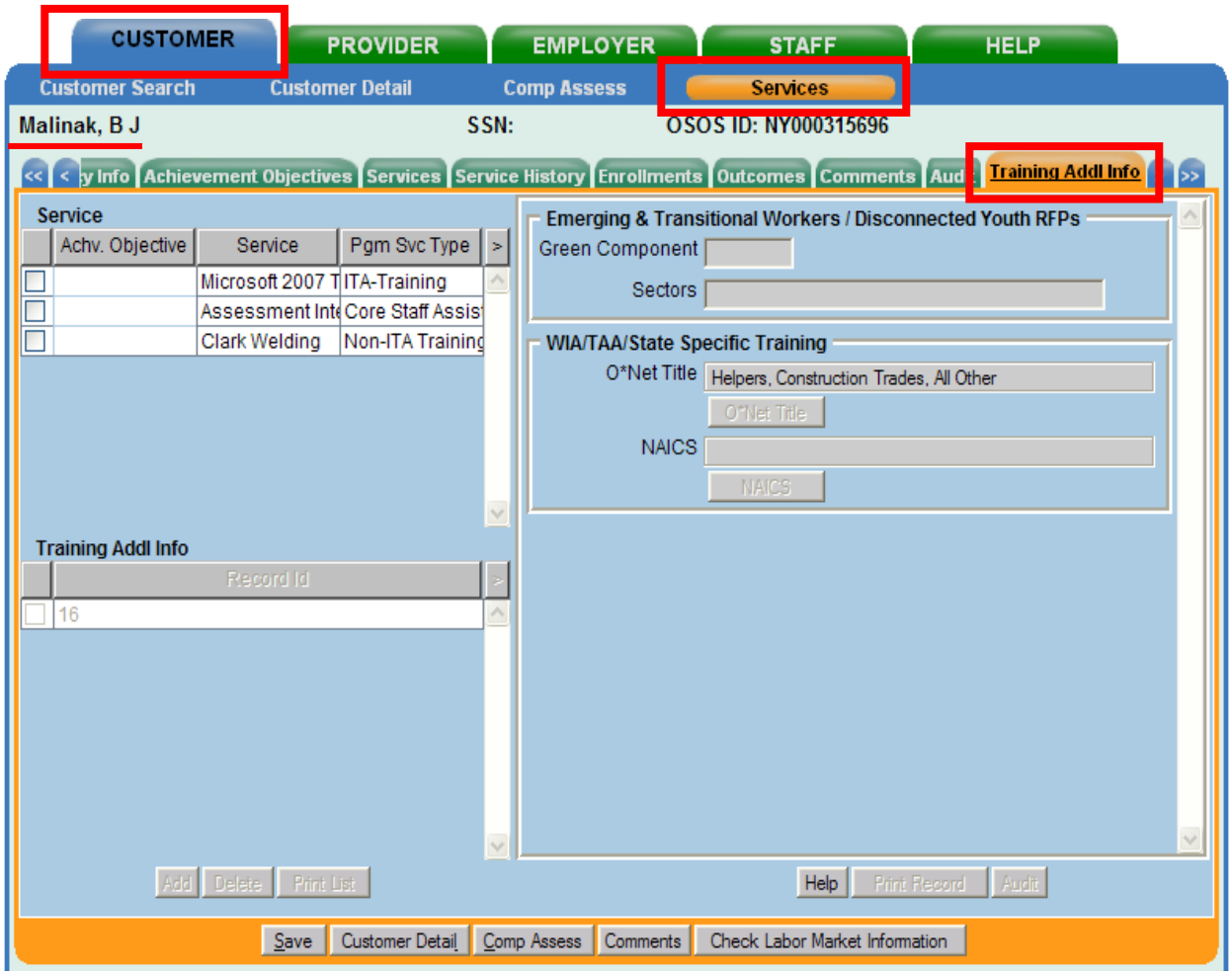
Most services begin and end on the same day. Exceptions include, but are not limited to, work experiences/internships, summer employment and **On-the-Job Training**.

The Actual End Date cannot contain a future date. The date must be today's date or a past date.

Chapter 4

Job Seeker/Customer Data Entry (Training Addl Info Tab)

The **Training Addl Info** custom tab is found in the **Customer Module – Services Window**.



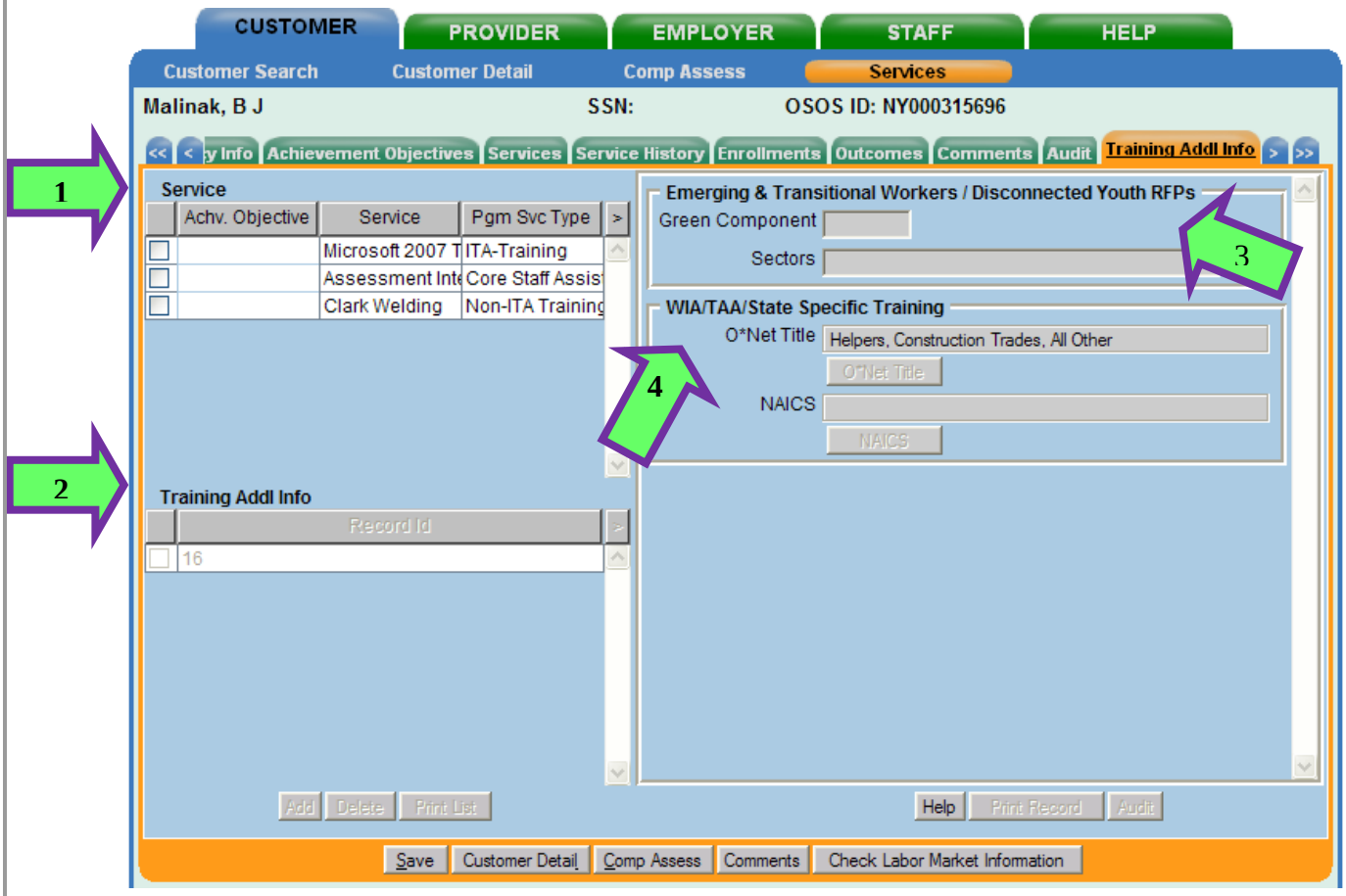
This custom tab is a listing of the L2 services that have been entered for this customer by any staff person. The user may sort the individual columns by clicking the column headings in the Service section of the window.

Chapter 4 – Job Seeker/Customer Data Entry (Training Addl Info Tab)

Customer Module, Services Window - Training Addl Info Tab

The **Training Addl Info** tab consists of four sections:

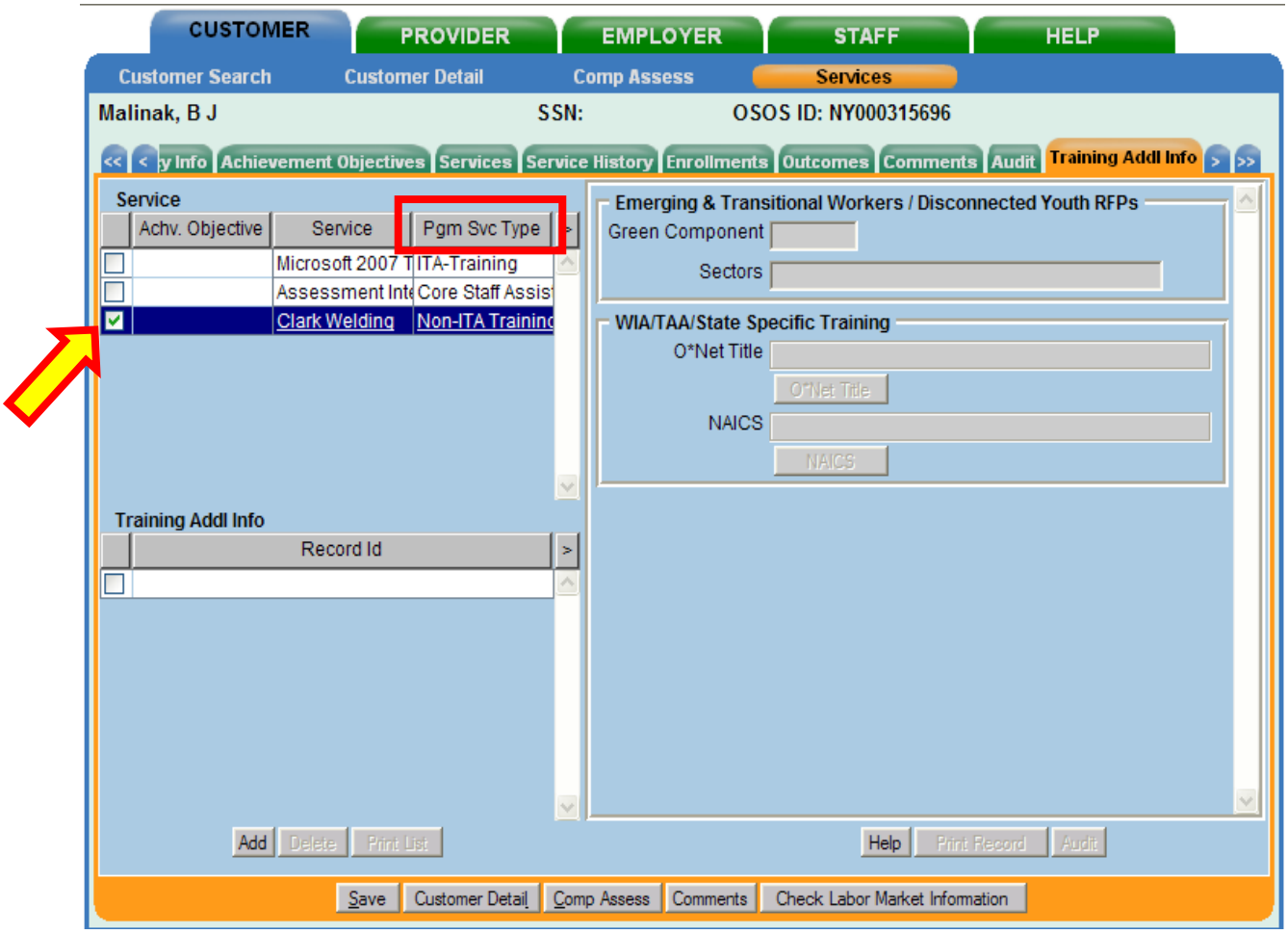
1. **Service**
2. **Training Addl Info**
3. **Emerging & Transitional Workers / Disconnected Youth RFPs – Green Component & Sector**
4. **WIA / TAA / State Specific Training – O*Net Title and NAICS**
    1. The Occupational Information Network (**O*Net**) is a database which defines the key features of an occupation as a standardized, measurable set of variables called "descriptors". The customer's O*Net Title will be carried over from the Customer Detail Module, Customer Detail Window, Objective tab.
    2. The North American Industry Classification System (**NAICS**) groups establishments into industries based on the activity in which they are primarily engaged.



Please note: Not all programs require data entry for all data fields in this tab.

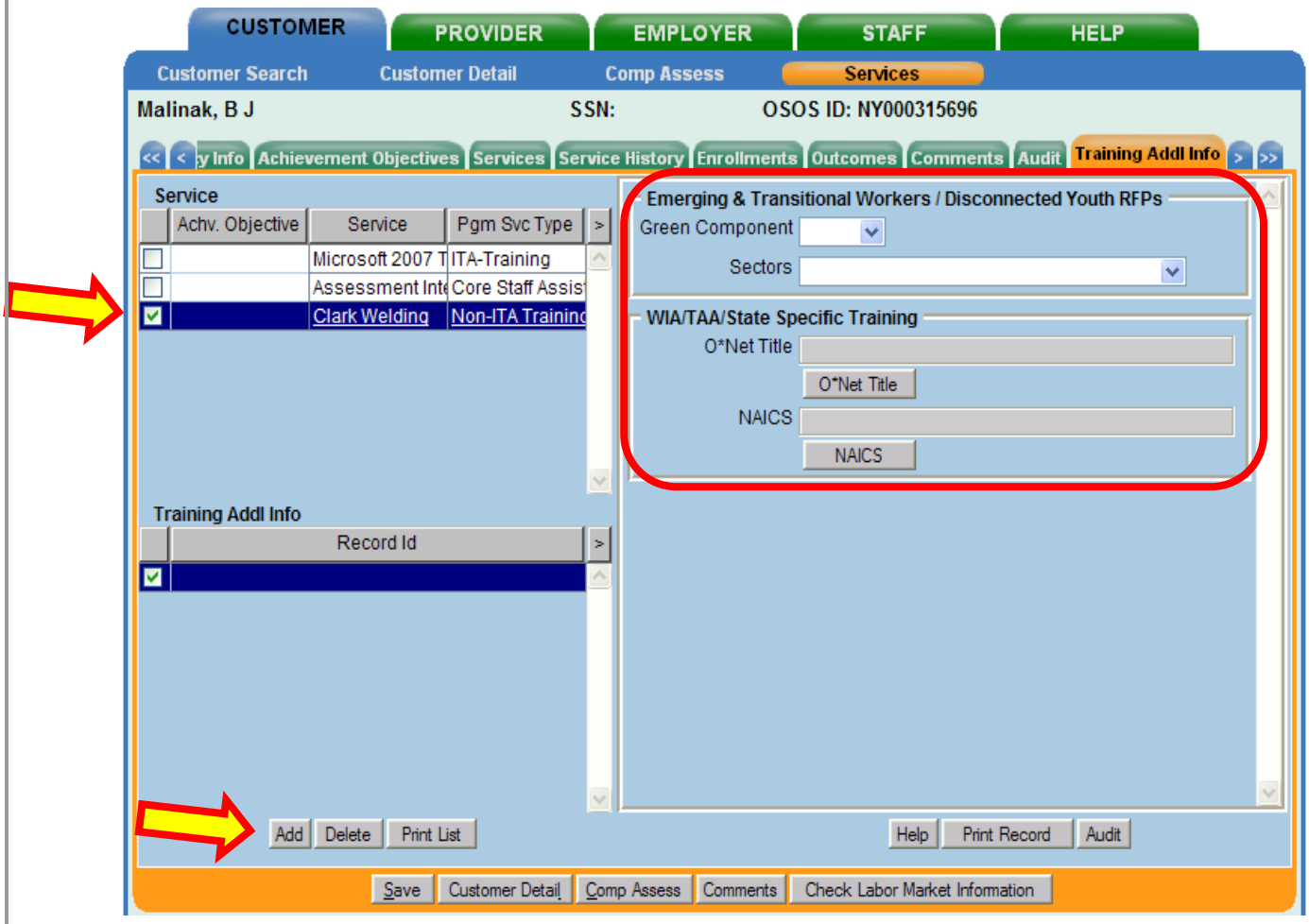
Customer Module, Services Window - Training Addl Info Tab

For customers served under the RFA 20-R OJT Program the "**Pgm Svc Type"** should be **Non-ITA Training.**



Customer Module, Services Window - Training Addl Info Tab

Place a check mark in the box next to the training service and click the **Add** button.

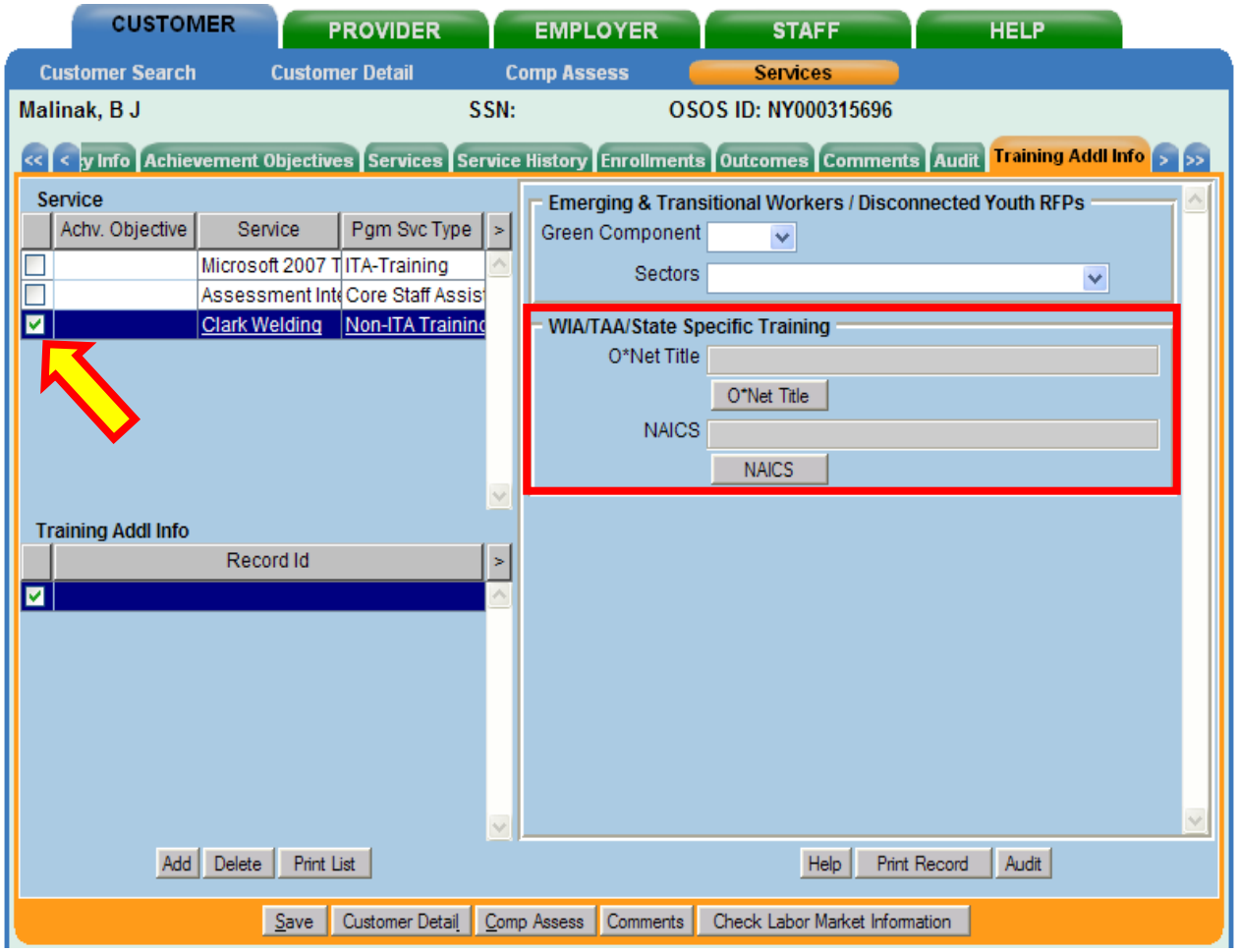


This will activate the ***Green Component*** and ***Sectors*** data fields in the **Emerging & Transitional Workers / Disconnected Youth RFPs** section. These data fields are not required for the RFA 20-R State-Level OJT program.

The ***O*Net Title*** and ***NAICS*** *(*North American Industry Classification System) buttons in the **WIA/TAA/State Specific Training** section will become activated as well. The ***O*Net Title*** and ***NAICS*** are used to indicate the occupational goal for the customer and the Industry to which the respective training service is leading.

Customer Module, Services Window - Training Addl Info Tab

The **O*Net Title** is a required field for all Workforce Investment Act (WIA) and State contract funded training. The **NAICS** is optional, but users are encouraged to complete this field when the information is available.



Click on the O*Net Title button to activate the Select O*Net - Webpage Dialog box.

Customer Module, Services Window - Training Addl Info Tab

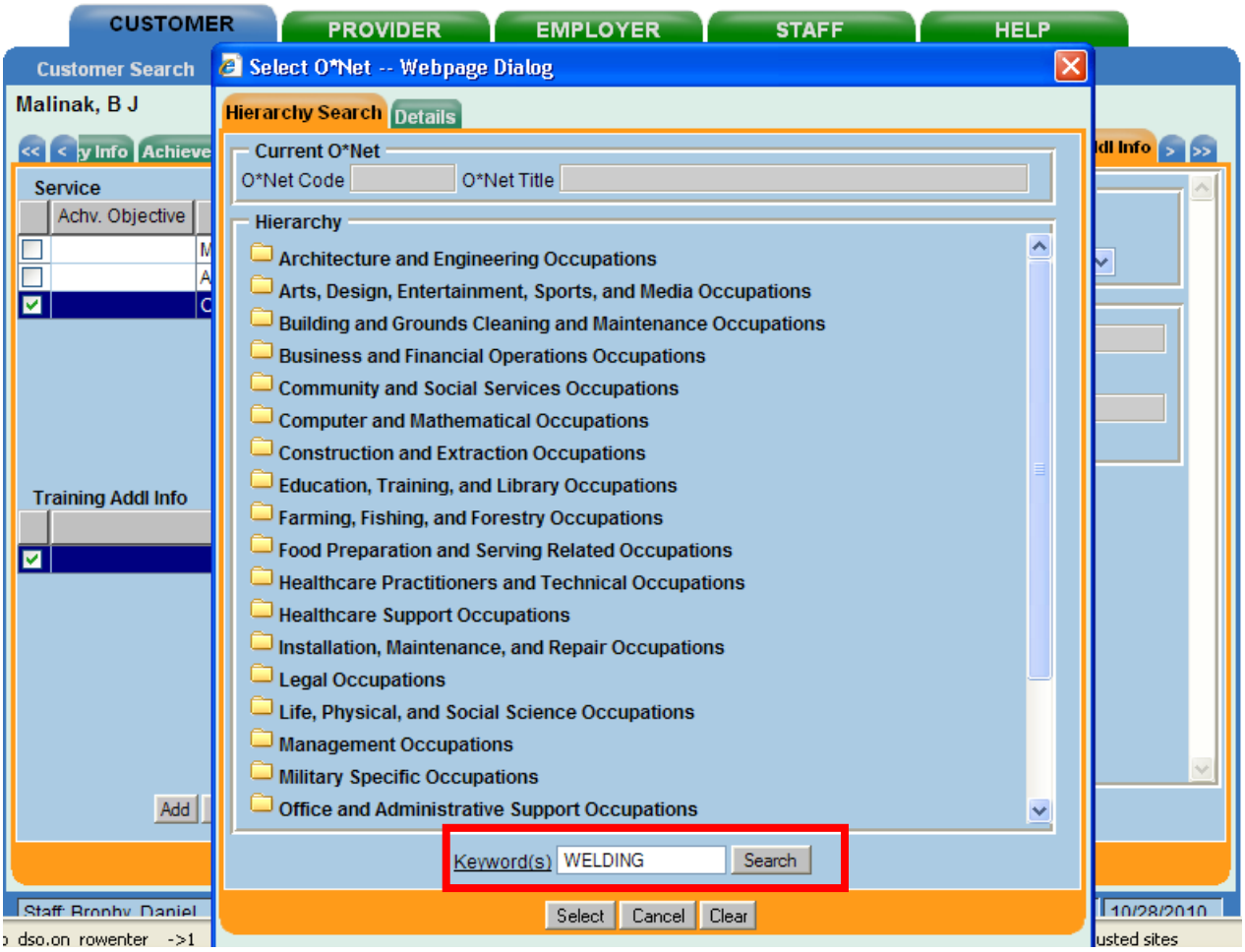
There are two ways to find the desired O*Net Title:

1. Keyword
2. Hierarchy

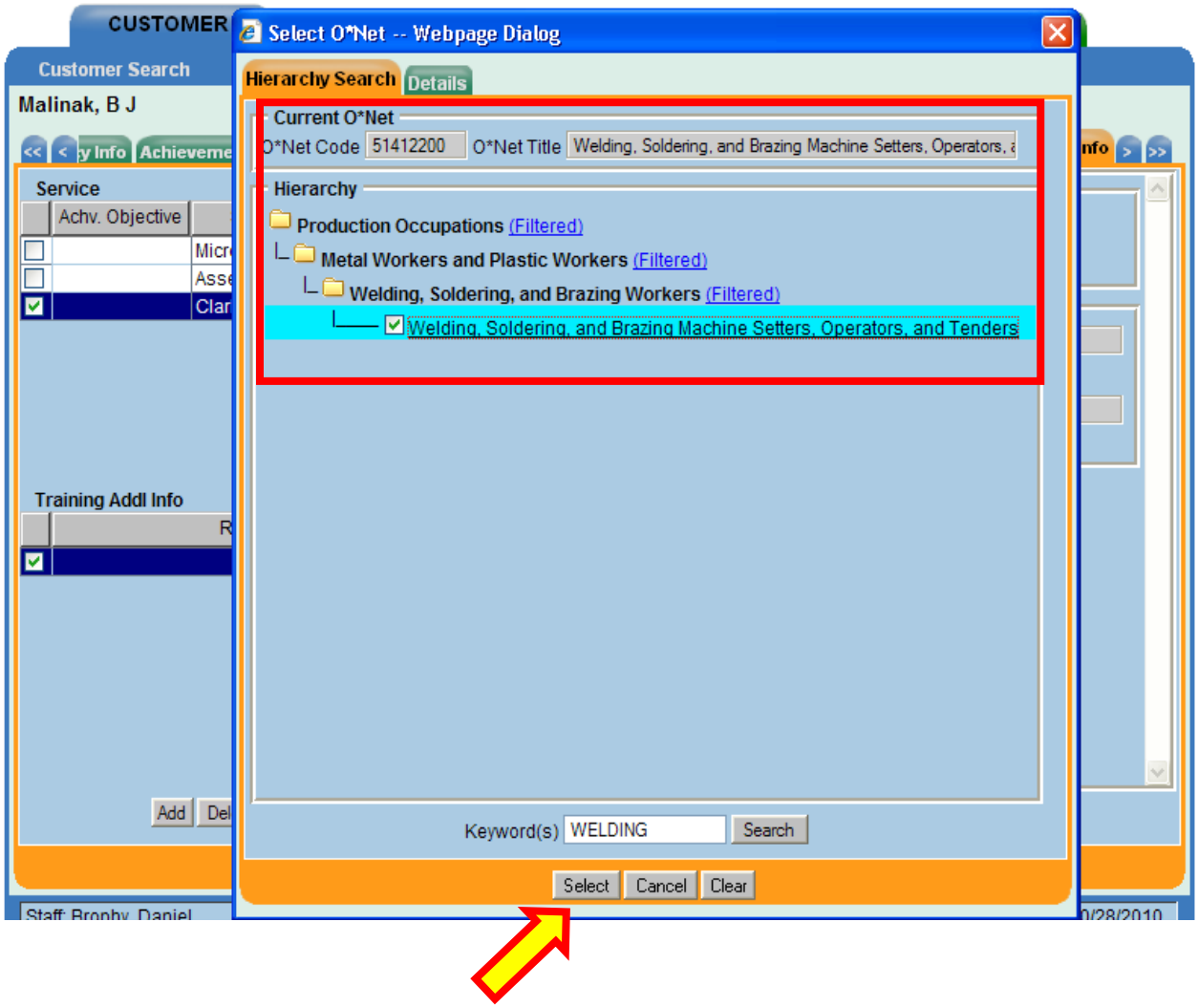
Click the **O*Net Title** button to bring up the **Select O*Net- - Webpage Dialog** box.

To perform a Keyword Search, type the occupational title into the Keyword(s) text box. Alternatively, copy and paste the occupation from another field or website.

Click **Search**.



Customer Module, Services Window - Training Addl Info Tab



Check the box next to the most appropriate title.

Click **Select**.

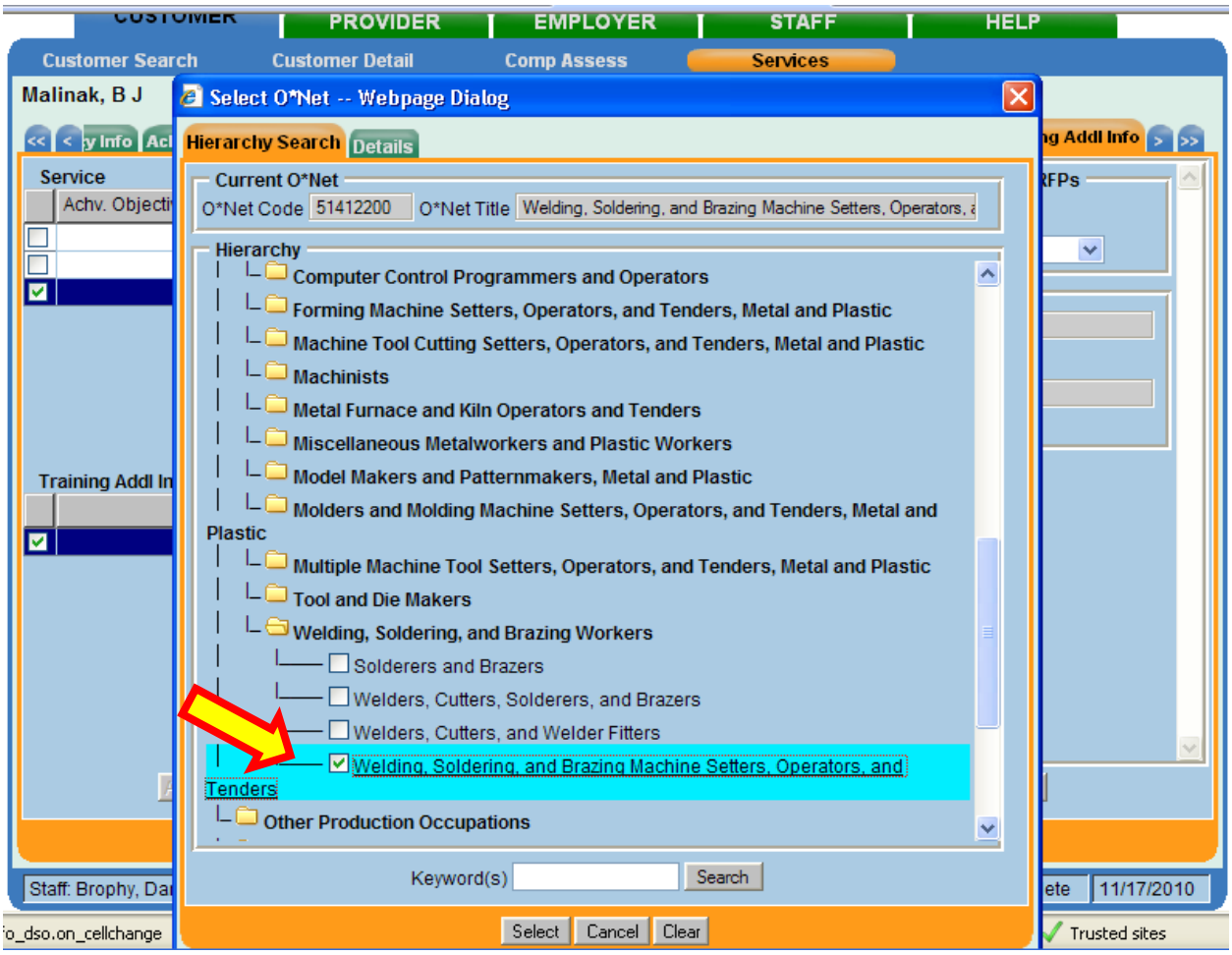
Click **Save**.

Customer Module, Services Window - Training Addl Info Tab

To perform a **Hierarchy Search**, click the folders to “drill down” until you find the occupational title that matches the training.

Check the box next to the most appropriate title.

Click **Select**.

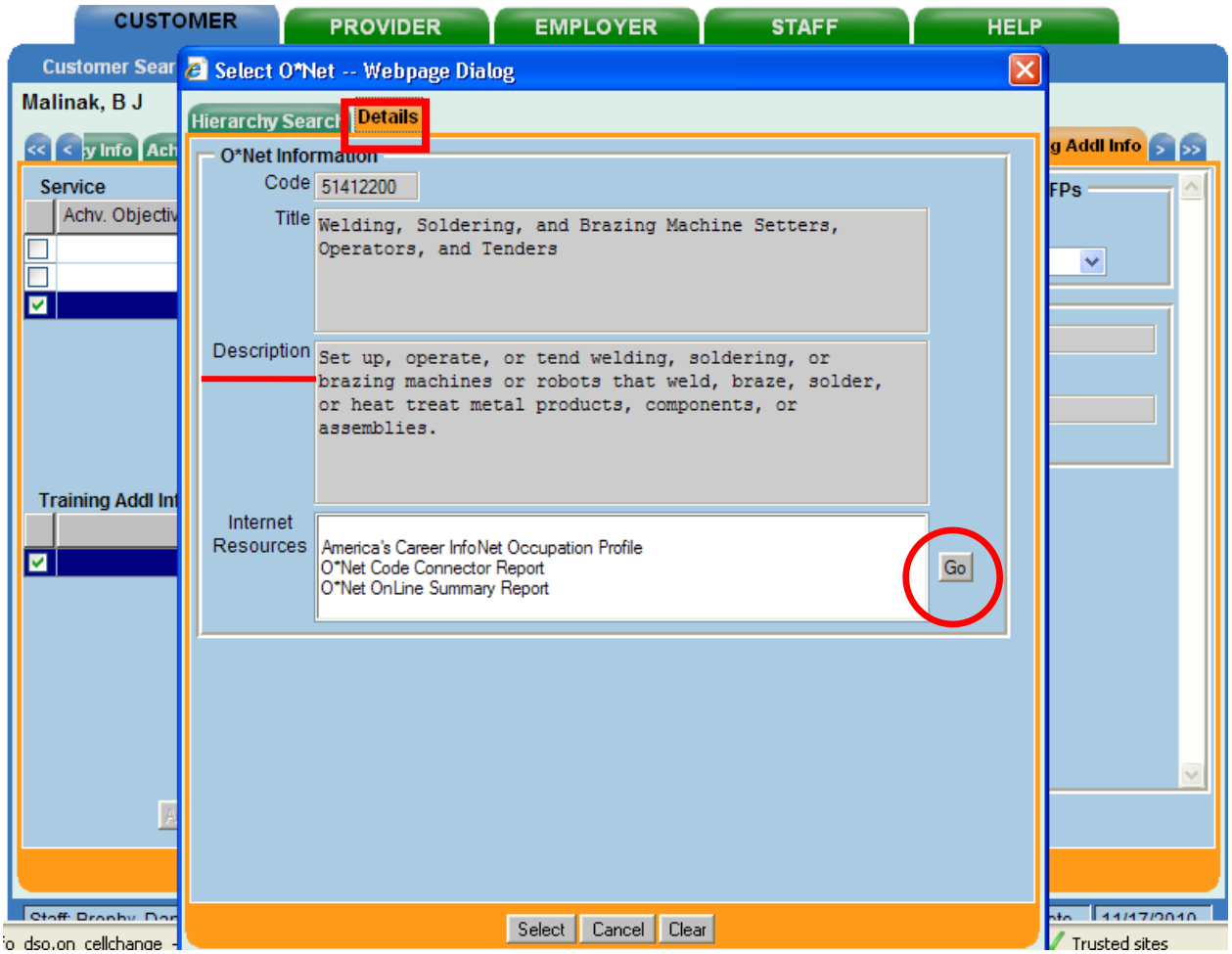


Click **Save**.

Customer Module, Services Window - Training Addl Info Tab

When the appropriateness of which **O*Net Title** to select is in doubt, click the **Details** tab to review the description for each title under consideration. It is best to discuss the descriptions with the customer to determine the most appropriate title.

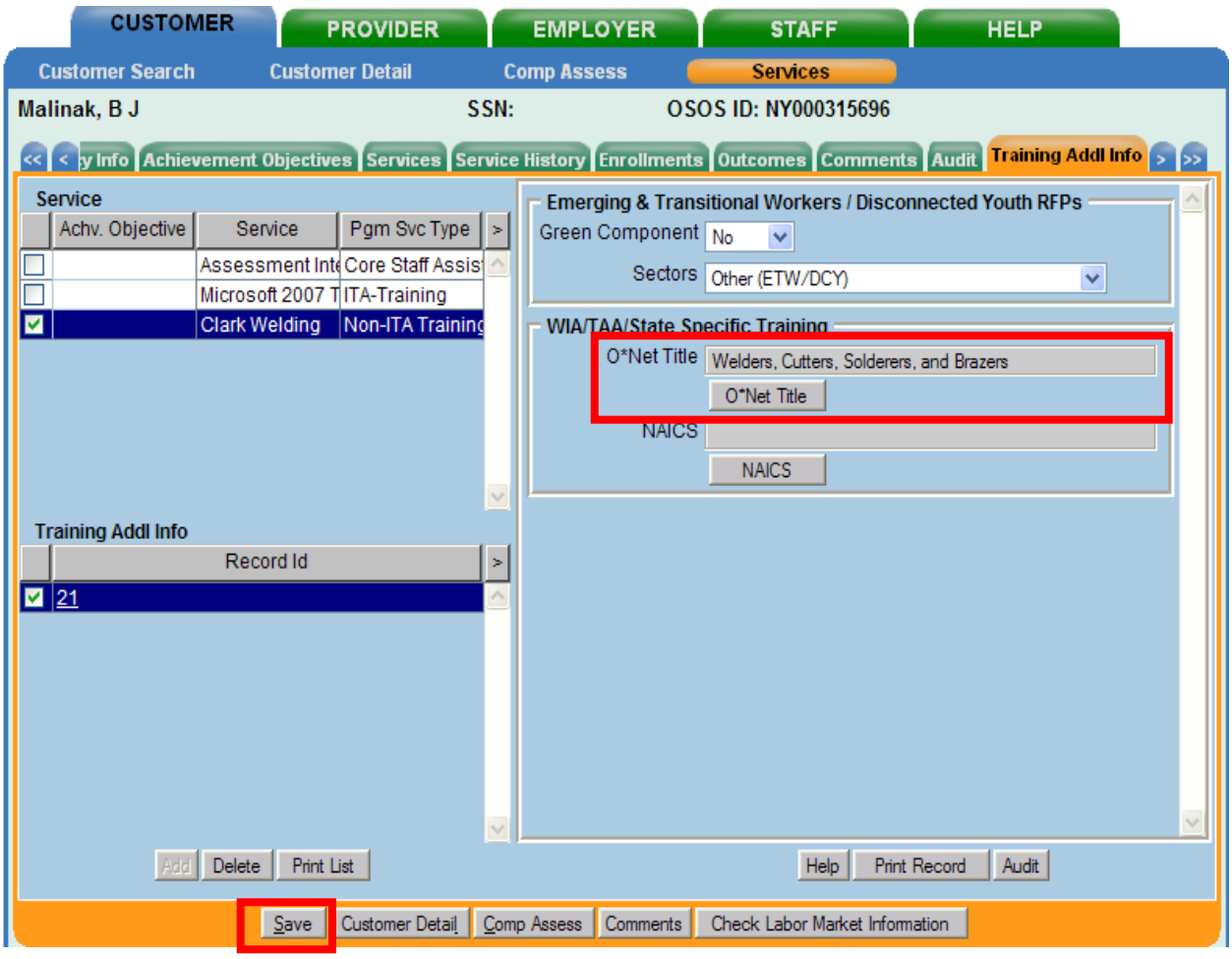
Click on the **Details** tab of the "**Select O*Net – Webpage Dialog**" box to bring up the O*Net Title description. Once the most appropriate title has been chosen, click **Select.**



Please Note: the **Select O*Net- - Webpage Dialog** box also includes the **<u>Internet Resources</u>** selection on the Details tab. Choose which webpage you'd like to visit and click on the **Go** button. A separate web browser page will open. You may do additional Occupational searches and copy and paste the appropriate occupation name into the OSOS Keyword search box.

Customer Module, Services Window - Training Addl Info Tab

The selected **O*Net Title** will populate the O*Net Title text box.

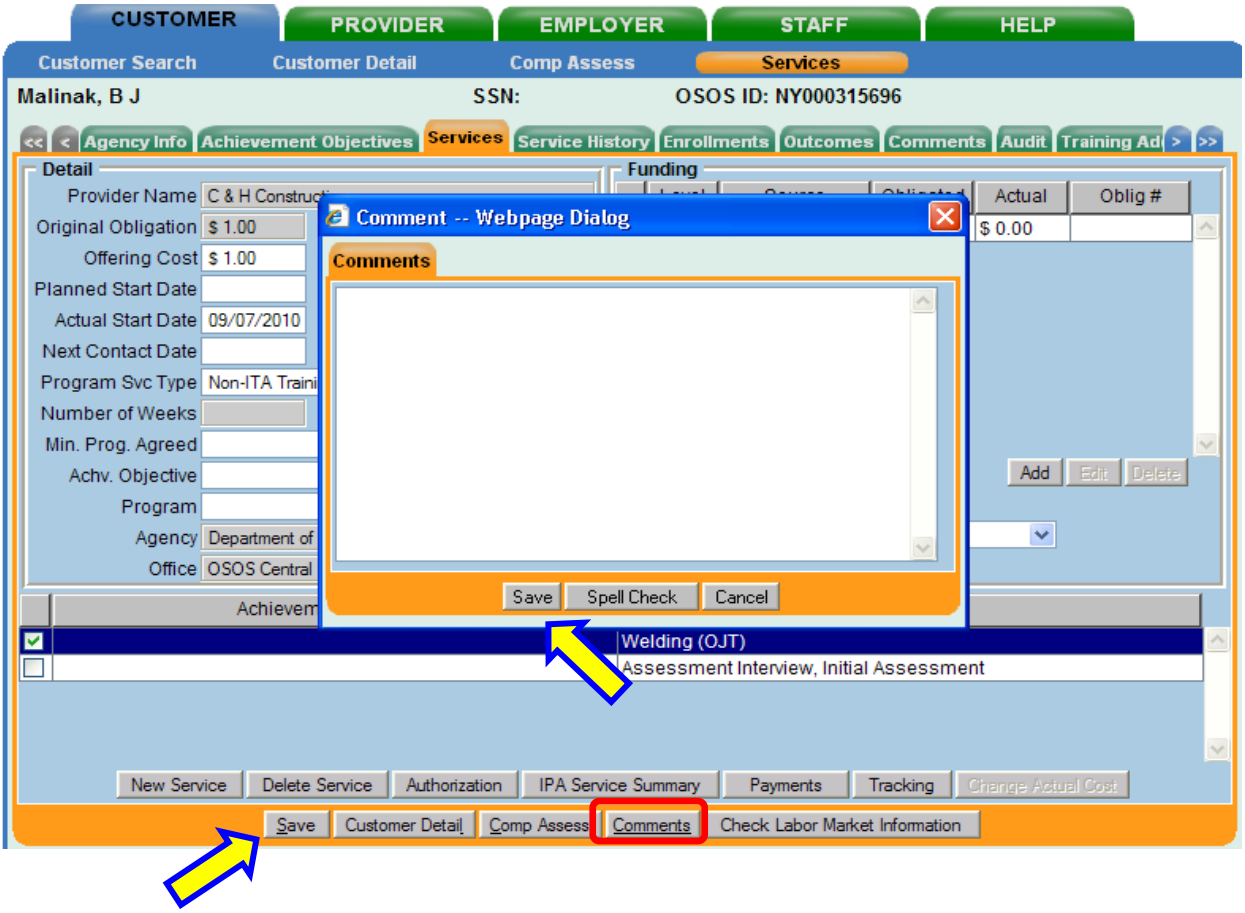


Click **Save**.

The North American Industry Classification System **(NAICS)** groups establishments into industries based on the activity in which they are primarily engaged. This is an optional field but users are encouraged to complete this field when the information is available.

Adding Comments

Reminder: add comments and details about the training service using factual information that includes dates if the comment is being entered after the date of service. Click on the **Comments** button to enter the comment.



Click the **Save** button on the "Comment – Webpage Dialog" box after adding a comment and the **Save** button at the bottom of the screen before leaving the Services module.

For data entry questions, contact OSHELP at HELP.OSOS@labor.ny.gov (518) 457-6586.