Provider Search and Documenting Services to Youth Program Customers
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PURPOSE

This guide will provide a comprehensive overview of searching for Youth Program offerings and attaching services to youth records.

Important Definitions

Providers – Providers are approved organizations in a local area that offer services to youth participants. Providers can offer services in multiple locations within a Local Workforce Development Board (LWDB).

Services – Under the Workforce Innovation and Opportunity Act (WIOA), the LWDB is tasked with ensuring that all 14 WIOA Youth elements are available in its area. This is achieved by local providers, who may offer one or more program elements.

Offerings – Offerings are entered in OSOS by designated local area staff. They are used to designate where and when the service will take place. Offerings also provide information regarding language, number of available seats, and other pertinent service information. Local areas can provide multiple offerings for the same service element.
OSOS Terms

OSOS is comprised of Modules, Windows, Tabs, and functional Buttons as illustrated in the screenshot below. These terms will be referenced throughout this guide.
PROVIDER SEARCH

To begin, locate the correct customer record. From the Customer module, navigate to the Services window (highlighted in the screenshot below).

If a customer has an existing OSOS record, it is important to ensure all information is verified and updated each time you work with the customer.
From the Services window, select the Services tab and click the New Service button at the bottom of the screen. OSOS will navigate to the Provider module.
OFFERING SEARCH

All Level 2 (L2) Youth Services are created and stored in the Provider module.

There is designated staff in each of the Local Workforce Development Areas (LWDAs) that have permissions to create and modify provider offerings. It is important that you work with your partner who has the ability to add new offerings to ensure that there is an offering available for each of the service elements.

From the Provider module, navigate to the Offering Search window. If the Offering ID is known, enter it in the Offering ID field and click Search.

As a best practice, staff working with youth customers should create a list of commonly used Offering IDs used by a given provider. This will make it easier to select the appropriate service when entering data.
If the Offering or Provider ID is unknown, the offering must be identified by searching in the Offering Search window.

Customizing search results will help ensure the appropriate service type, offering and location is associated with the service being provided. Before searching for the service, click the **Options** button to customize your search results.
This opens the **Offering Search Results Columns Webpage Dialogue** box.

Select the options to display in your offering search results. Here is a suggested sequence of display options: (1) **Provider Name**, (2) **Service Name**, (3) **Service Description**, (4) **Service Type**, and (5) **Location Name**. Additional options may be selected as needed. Once you have identified and ordered the fields that you wish to display in your search results, select the **Set as My Defaults** check box.

Click **Save**.
Click on the **General Info** tab to begin the provider search. In the **Location** section, select the appropriate LWDB (which is referenced in OSOS as WIB) from the dropdown. Then click the **Service Type** button.
SERVICE TYPE SELECTION

Once the Service Type button has been selected, the Service Type -- Webpage Dialog box will appear. OSOS Service Types are organized into three hierarchies: Groups, Categories, and Service Types. The first set of folders are Groups. For the purpose of youth data entry, staff will select the L2 WIOA Youth Services group.

The second set of folders are the Categories. These Categories mirror the 14 WIOA Youth Elements with one additional Category that encompasses the Design Framework Services. Within each of the Categories are the Service Types that are selected when data entering the Program Service Type for the customer. These terms will be used throughout this guide.

Prior to attaching a Youth Element to a participant record, all youth eligibility data must be documented in OSOS. In addition, an Objective Assessment and the Development of Individual Service Strategy must be completed with the customer and the respective Service Types entered in OSOS under the Design Framework Category.
L2 WIOA YOUTH SERVICE CATEGORIES AND SERVICE TYPES

- Design Framework
  - Intake and Eligibility Determination (Youth)
  - Objective Assessments (Youth)
  - Development of Individual Service Strategy (ISS) (Youth)
  - Update of Individual Service Strategy (ISS) (Youth)

- Adult Mentoring Element
  - Adult Mentoring (Youth)

- Alternative Secondary School/Dropout Recovery for HS Equivalency Element
  - Alternative Secondary School/Dropout Recovery for HS Equivalency (Youth)

- Comprehensive Guidance and Counseling Element
  - Comprehensive Guidance and Counseling (Youth)

- Entrepreneurial Skills Training Element
  - Entrepreneurial Skills Training (Youth)

- Financial Literacy Education Element
  - Financial Literacy Education (Youth)

- Follow-up Services Element
  - Follow-up Adult Mentoring (Youth)
  - Follow-up Financial Literacy (Youth)
  - Follow-up Labor Market and Employment Information (Youth)
  - Follow-up Postsecondary Transition (Youth)
  - Follow-up Supportive Services (Youth)
  - Follow-up Non-Element (Youth)

- Integrated Ed./Education Concurrent with Workforce Preparation Element
  - Integrated Ed./Education Concurrent with Workforce Preparation (Youth)

- Labor Market and Employment Information Element
  - Labor Market and Employment Information (Youth)

- Leadership Development Opportunities Element
  - Leadership Development Opportunities (Youth)

- Occupational Skills Training Element
  - Occupational Skills Training

- Postsecondary Education/Training Preparation and Transition Element
  - Postsecondary Education/Training Preparation and Transition (Youth)

- Supportive Services Element
  - Supportive Services – Child Care (Youth)
  - Supportive Services – Dependent Care (Youth)
  - Supportive Services – Housing (Youth)
  - Supportive Services – Needs-Related Payments (Youth)
  - Supportive Services – Transportation (Youth)
  - Supportive Services – Other (Youth)

- Tutoring, Study Skills Instruction/Dropout Prevention for HS Diploma Element
  - Tutoring, Study Skills Instruction/Dropout Prevention for HS Diploma (Youth)

- Work Experience Element
  - Employment/Internships, Not Limited to Summer (Youth)
  - Job Shadowing (Youth)
  - On-the-Job Training (Youth)
  - Pre-Apprenticeship Programs (Youth)
  - Summer Employment/Internships, Summer Only (Youth)
  - Other Work Experience Type (Youth)
All WIOA Youth Program Services Types can be found by selecting the **L2 WIOA Youth Services** group, and selecting the appropriate folder.

*NOTE: Occupational Skills Training will not display the word Youth in the Service Type because of the requirement that all ITA trainings must be listed on the Eligible Training Provider List (ETPL). Since the ETPL does not differentiate trainings available to youth and adults, the same service type must be used for all ETPL approved trainings.*
Select the appropriate Category and Service Type. Click **OK** at the bottom of the screen.
OFFERING SELECTION

When the appropriate Service Type has been selected, it will populate the Service Type field in the Offering Search window, on the General Info tab.

Next, click the Search button at the bottom of the screen to generate the list of providers.
SCHEDULING AN OFFERING

After clicking the **Search** button, a list of providers will appear in the search results. Choose the appropriate provider, service name, and location for the offering. Then click **Schedule** at the bottom of the screen.
DATES AND PROGRAM SERVICE TYPES

Once the service has been scheduled, it will be attached to the youth record. Details of the service must now be entered. This is done within the Customer module, under the Services window, on the Services tab. The Provider Name, Location Name, Provider ID and Offering ID will populate in the Detail section.

The following information is required and must be entered in the Detail section:

- Planned Start Date – Anticipated date the Youth Service is expected to start.
- Planned End Date – Anticipated date the Youth Service is expected to end.
- Actual Start Date – Date the Youth Service begins. NOTE: A service cannot be funded prior to the Actual Start Date.
- Next Contact Date (not required, but recommended) – Entering a date in this field will generate a reminder that will be sent to the Inbox in the Staff module of OSOS for any service details that require additional attention.
- Program Service Type – All WIOA Youth Services, with the exception of Follow-Up, must be entered as Youth Services.
Entering an Actual End Date on an offering will end the service. Entering an Actual End Date on the last open service of an enrollment will start the 90-day exit process.

Highlighted in the screenshot below, you can see that Occupational Skills Training has been selected as the Service Type and Youth Services was selected as the Program Service Type. Staff must always select Youth Services for the Program Service Type unless they are entering Follow-up Services.
INDIVIDUAL TRAINING ACCOUNT (ITA) EXCEPTION

NOTE: Occupational Skills Trainings or Youth ITAs can only be provided to Out-of-School Youth (OSY).

To enter an Occupational Skills Training Service through a Youth Program funded ITA, select the **Occupational Skills Training** service type as described in the Service Type Selection section. Then, select **Youth Services** in the Program Service Type drop-down and **Youth ITA Waiver** in the Program drop-down as shown in the screenshot below. This is the only way to enter a Youth ITA, fund the training with WIOA Youth funds, and ensure that it is reported correctly.
FOLLOW-UP EXCEPTION

Staff are required to provide Follow-up Services to youth for a minimum of one year after the last service is provided. Under WIOA, there are five allowable service elements that can be provided to youth as Follow-up Services.

In the Follow-Up Services Element folder, the five allowable Follow-up Service Types are listed. In addition, the ‘Follow-up Non-Element (Youth)’ service type is listed and should be recorded when a concrete Follow-up Service outside of the five allowable elements was provided. Contacting the youth’s school counselor to check-in and discuss the youth’s progress is an example of when staff should select the “Follow-up Non-Element (Youth).” This service type should not be selected when there was no concrete service provided. For instance, contacting the youth to update address information would not be the appropriate use of the “Follow-up Non-Element (Youth)” service type.

To attach a Follow-up Service, first select the Follow-up Services Element folder, and then select the Follow-up Service Type that most accurately reflects the Follow-up Service that was provided to the youth.
Select **Follow Up** from the **Program Service Type** drop-down. This is selected because providing Follow-up Services should not create or extend an enrollment.

*Do not select Youth Services as the Program Service Type to record a Follow-up Service.*
ACHEIEVEMENT OBJECTIVE

All Youth Services are required to have an associated Achievement Objective which must be created prior to entering the service. Select the appropriate Achievement Objective from the drop-down. Click Save.
If the appropriate Achievement Objective is not available from the drop-down selection, it must be created prior to saving the service. This is done from the Services window, under the Achievement Objectives tab. Begin by clicking on New Objective.
In the **Achievement Objectives** section, enter the Achievement Objective, Planned Start Date, Planned End Date and Evaluation Date. Click **Save**. This Achievement Objective will now be available from the drop-down menu when entering Service Details on the **Services** tab.

As a best practice, staff working with a youth should record goals established on the Individual Services Strategy (ISS) as Achievement Objectives. The Print button at the bottom of the screen allows staff to print all the Achievement Objectives so that the youth can be provided with a copy to keep. Also, the occupational and academic components of a work experiences can be recorded as Achievement Objectives.
FUNDING A SERVICE

After the required service details have been saved, funding for the service must be entered in the Funding section of the Services tab. WIOA-funded services are entered differently than services that are not funded by WIOA.

If the service will be funded through WIOA, enter 1 in the Total Funding field.

If the service will not be funded through WIOA, enter 0 in the Total Funding field.

Click Add. This will open the Funding -- Webpage Dialog box.
From the list of available Funding Sources, select **WIOA Youth Local** with the appropriate Program Year.

If the service is funded through WIOA, enter 1 in the **Obligated Amount** field.

If the service is not funded through WIOA, enter 0 in the **Obligated Amount** field.

The **Obligated Percentage** will auto fill. Click **OK**.
Review service details to ensure proper data entry and click **Save** when complete.
ENROLLMENT VERIFICATION

If the entry of the service generates a new enrollment, the Verification -- Webpage Dialog box will appear. Review the information on the Customer Detail and Comp Assess tabs. Verify all data and enter information as required. Then, click Save at the bottom of the screen.

Adding or correcting information in the Verification -- Webpage Dialog box will update the Customer Detail and Comprehensive Assessment windows. Make sure to record all known barriers at the time of eligibility. This will ensure an accurate OSOS record for the youth and assist staff with appropriate service delivery. It will also provide an accurate snapshot of barriers faced by the local area’s target populations to appropriately adjust performance goals.
ADD SENSE COMMENTS

After attaching any service, or to record each interaction you have with a youth, write effective and quality case notes in OSOS using the Situation, Evaluation, Next Steps, Sufficient Information, Employment-Related Information Only (SENSE) Model.

See the Resources section for guides on using the SENSE Model.
CLOSING THE YOUTH SERVICE

To close the service in OSOS, enter the Actual End Date and select a completion status in the Completed Successfully field. Then click Save at the bottom of the screen.

If there are no open services, then the automatic 90-day exiting process will start as of the Actual End Date of the last service (see Technical Advisory 11-7 for more information). Please note that Follow-up Services provided to the youth should begin when the last service ends. Along with entering Follow-up Services, staff should also enter any performance measure outcomes the youth achieved during the program or will achieve after the last service has been provided. For more information on recording outcomes, go to the Resources section below and follow the website link for additional OSOS Guides.
BEST PRACTICES FOR ENTERING SERVICES

- Next Contact Date – Staff are urged to use the Next Contact Date field under the Customer Module, Services Window, Services Tab. This will set a reminder in the Staff Inbox to touch base with the youth and/or update the service depending on the youth’s status.

- Planned end dates – Under the Customer Module, Services Window, Services Tab staff often place an extended amount of time in the Planned End Date field. The extended service time may cause staff to forget the open service that is attached to the youth record, resulting in poor service quality which may keep the youth in the Performance Measures when he/she has already achieved his/her goals in the WIOA program. It is recommended that shorter time frames are used when developing planned end dates correlating with the youth’s Individual Service Strategy.

- Achievement Objectives – Under the Customer Module, Services Window, Services Tab staff assign an Achievement Objective that serves as a goal, in relation to the Individual Services Strategy. Make sure the services provided align with the Achievement Objectives.

- Service Designation – There are no specific requirements for LWDA’s when naming services. However, if there are multiple Youth Program providers for one LWDA, it is recommended that similar services are uniformly named across the providers. For example, a LWDA may have three Youth Program providers who provide tutoring. The LWDA could name this service “Tutoring- Improving Basic Skills” for all three providers.

- If a LWDA has changed youth providers (e.g. due to the issuance of a new Request for Proposal) it is important to ensure services are entered under the correct providers.

- L2 WIOA Youth Services – Some local services could fit into multiple WIOA Youth Program Elements. Report the service under a Service Type that best fits the definition of services described in Training and Employment Guidance Letter 21-16.
RESOURCES AND ASSISTANCE

Technical Advisory 11-7: Common Enrollments and Exits, and Inclusion in Workforce Investment Act and Wagner-Peyser Performance Measures

For details on the WIOA 14 elements read TEGL 21-16:

Desk Guide for Provider Module Data Entry and Maintenance (page 28)

SENSE Comments – Write effective and quality case notes in OSOS using the Situation, Evaluation, Next Steps, Sufficient Information, Employment-Related Information Only (SENSE)
Model to record each interaction you have with a youth.
  o Worksheet for writing an effective case note in OSOS
  o Video for writing quality case notes in OSOS

Additional program information, OSOS guides and other resources can be found at:
https://labor.ny.gov/workforcenypartners/osos.shtm

For further assistance with data entry, please contact the OSOS Help Desk:
  By phone: (518) 457-6586
  By email: help.osos@labor.ny.gov

For questions related to Youth programs, please contact the NYSDOL Program Development Office, Youth Team By email: youthoffice@labor.ny.gov