



**RE-
EMPLOYMENT
ASSESSMENT**

Data Entry Into NYOSOS

JUN 30th 10a-12n / JUL 7th 2p – 4p

John Brooks, DEWS, BEWO, NYOSOS / REOS Central Support Unit



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Welcome

Purpose of Webinar

How to Accomplish:

- 1. Registering New Customers**
 - especially UI customer records
- 2. DEV Requirements**
- 3. Recording Effective Case Notes**
- 4. Recording L1 Services (Activities)**
- 5. Enrollment Basics**
 - functional alignment
- 6. Match/Refer Customer to Job**

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6 main topics today . . .

**Registering customers – starts the ball rolling for case managing the customer
some major differences between walk in customers and a UI customer**

Data Element Validation – responsible to US Congress

Case Notes are the descriptors that add “flavor” to case management

Level 1 Services – low “level” of staff involvement – minimum data entry (for service)

Enrollment Basics – understanding the big picture of our programs

Match / Refer – linking customers to jobs



How Accomplished

- Use of
 - Case Management System
 - NYOSOS - tool for painting picture
 - Collecting and Recording
 - Customer Descriptions / Demographics
 - Assessments: Current, Desired, Progress
 - Provision of services
 - Comments (Case Notes): *Document / Justify Customer's path through system*



How do we make sure these purposes are met?

Using the same statewide case management system.

NYOSOS is a TOOL to assist in managing our customers

Consistent definitions across the state

Consistent policies across the state – leaving room for regional and/or local

“tweaking”

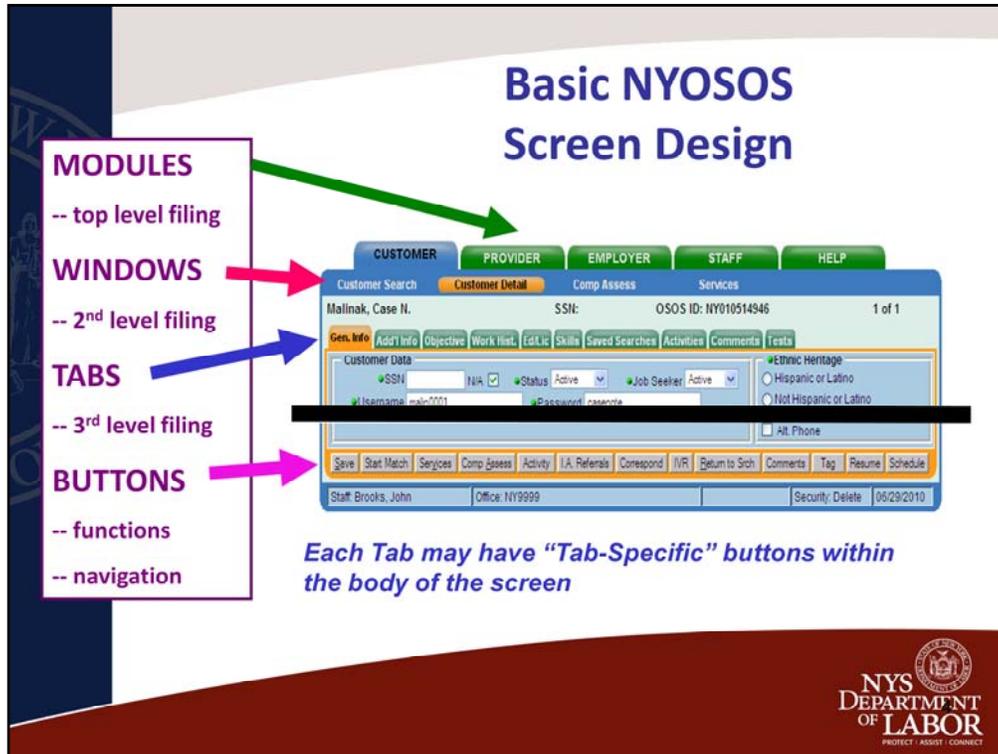
Relates to real-time use

customer focused

value-added / logical

provides competitive advantage

Paints a “Picture” of specific customer’s pathway through the system



NYOSOS is set up like a huge filing system . . .

Top Level of filing = MODULES

= 5 / Customer / Provider / Employer / Staff / Help

2nd Level of filing = WINDOWS – highlighted in Orange when selected

multiple WINDOWS PER MODULE

eg. Customer Module has 4 Windows

Customer Search

Customer Detail

Comp(prehensive) Asses(ment)

Services

3rd Level of Filing = TABS

multiple TABS per WINDOW

eg. Customer Module / Customer Detail Window has 10 Tabs

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

At the bottom are WINDOW BUTTONS – they are available for any of the TABS in a respective WINDOW -- three functions:

1. Navigate to other Windows
2. Initiate software functions – Save / Activity / Tag
3. View Summary pages

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

Staff Detail Logout Preferences

Inbox Referrals In Fund Approval

Appointments and Reminders for Wednesday, February 17, 2010

| <input type="checkbox"/> | Start Date | End Date | Start Time | End Time | Name | Event | Description |
|--------------------------|------------|------------|------------|----------|-----------------|-------------|---|
| <input type="checkbox"/> | 01/21/2010 | 01/21/2010 | 12:00 am | 12:00 am | Brooks, Larry | Missed date | Missed achievement objective end date |
| <input type="checkbox"/> | 01/21/2010 | 01/21/2010 | 12:00 am | 12:00 am | Brooks, Robert | Missed date | Missed achievement objective end date |
| <input type="checkbox"/> | 01/15/2010 | 01/15/2010 | 12:00 am | 12:00 am | Brooks, Jules | Missed date | Missed achievement objective start date |
| <input type="checkbox"/> | 01/14/2010 | 01/14/2010 | 12:00 am | 12:00 am | Allison, Levy | Missed date | Service should have ended. |
| <input type="checkbox"/> | 01/15/2010 | 01/15/2010 | 12:00 am | 12:00 am | Brooks, Sally | Missed date | Service should have ended. |
| <input type="checkbox"/> | 01/14/2010 | 01/14/2010 | 12:00 am | 12:00 am | Brooks, Lynn | Missed date | Service should have ended. |
| <input type="checkbox"/> | 01/15/2010 | 01/15/2010 | 12:00 am | 12:00 am | Brooks, Jules | Missed date | Missed achievement objective start date |
| <input type="checkbox"/> | 01/14/2010 | 01/14/2010 | 12:00 am | 12:00 am | Brooks, Marie | Missed date | Missed achievement objective end date |
| <input type="checkbox"/> | 01/22/2010 | 01/22/2010 | 12:00 am | 12:00 am | Brooks, Lindsey | Missed date | Missed achievement objective start date |
| <input type="checkbox"/> | 01/14/2010 | 01/14/2010 | 12:00 am | 12:00 am | Allison, Levy | Missed date | Service should have ended. |
| <input type="checkbox"/> | 01/14/2010 | 01/14/2010 | 12:00 am | 12:00 am | Brooks, Lynn | Missed date | Service should have ended. |
| <input type="checkbox"/> | 01/21/2010 | 01/21/2010 | 12:00 am | 12:00 am | Brooks, Larry | Missed date | Missed achievement objective end date |

Delete Message Detail Additional info Print

Save Refresh

Staff: Brooks, John Office: NY9999 Security: Delete 02/17/2010

Logging in will automatically bring you to your "Staff" Module >

"Staff Detail" WINDOW >

"Inbox" TAB

Module / Window / Tab / Window Buttons (Save / Refresh) / Tab Buttons (4 – only 1 currently active)

Navigate to the "Preferences" sub-division if you need to:

1. Change Your office
2. Change Your Password

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Staff Detail Logout Preferences

Login Preferences

Office

Primary Office NY9999

Current Office NY9999

Change Office To [dropdown]

Change Office

Password

Username usjmb

Old Password [input]

New Password [input]

Confirm New Password [input]

Change Password

Staff: Brooks, John Office: NY9999 02/17/2010

The Office box:

- shows your primary office (you will default to this office when logging in)**
- shows your current office (defaulted to primary)**

To change

- Choose from drop down list box**
- Click on Change Office button**

Password box

- shows your username**
- type in current password**
- type in new Password**
- re-type new Password to confirm**
- Click on Change Password button**

1 -- Registering New Customers

Walk-ins vs. UI Customer Records

- 1152 new customer records from UI on 6/25/2010
- 82 updated customer records from UI 6/18 – 25/10

| TCC UPDATE RECORDS | DATE | TCC ADD RECORDS |
|--------------------|-------------|-----------------|
| 22 | 18-Jun-2010 | 1087 |
| 1 | 19-Jun-2010 | 1078 |
| 21 | 21-Jun-2010 | |
| 18 | 22-Jun-2010 | 1858 |
| 8 | 23-Jun-2010 | 1301 |
| 4 | 24-Jun-2010 | 1297 |
| 7 | 25-Jun-2010 | 1145 |



When walk-in / non-UI customers – complete registrations need to be completed

For UI customers – basic registration info already exists in NYOSOS

Occurs nightly from the TCC batch process



Searching for UI Customer

- Do not use SSN
 - DOL policy is to protect individual
 - Don't ask verbally
 - If written – shred after locating customer's record
- Search on Last Name, First Name
 - If common – add other criteria
 - WIB / modified time / Veteran / etc.



You will probably already have the NYOSOS ID of the customer from the REOS download.

Best bet whether non-UI walkin or UI customer – search on last name, first name

If common name, include other search criteria

10 Search Tabs



Searching for UI Customer

- Use as many Search Tabs as necessary
- Restrictions on Searching
 - NYOSOS ID – only by itself
 - SSN (last resort) – only by itself
- May search for up to 20 individuals at a time
 - NYOSOS or SSN (last resort)



QUICK SEARCH – SSN / NYOSOS ID / LAST NAME / FIRST NAME / MI / BIRTHDATE / USERNAME (CUSTOMERS)

GEN. INFO

Office assigned search not viable == reflects office assigned on Gen Info Tab which may be different than your office.

Use WIB / MODIFIED DATES / STATUS

PROGRAMS

– VETERAN (v status / v era / recently separated / v disability stat) / Program (UI status / LLS / Migrant / Profiled

-- Drop Down list search (PROGRAMS&PUBLIC ASSISTANCE BUTTON FROM ADD'L INFO TAB) up to 4 choices.



UI Fields Needing Updating

Customer Detail Window

- TCC Add Process sets . . .
 - Gen. Info Tab
 - sets Seeker Status = Pending
 - UI Claimant Status = None
 - Addl. Info Tab – Veteran Fields
 - Objective Tab
 - Employment Objective = TO BE UPDATED



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UI data collected at the Telephone Claims Center (TCC) or from Online Claims

Overnight “batch job” inputs these customers into NYOSOS

Not all NYOSOS required data is collected during a UI Claim

Therefore – specific data must be updated when staff start using an NYOSOS record created by UI Batch Job.

UI Fields Needing Updating

Customer Detail Window

- Work History Tab
 - Job Duties = LAST EMPLOYER ON TCC RECORD FOR UI
- Skills Tab
 - Additional Skills Text = TO BE UPDATED

TCC Add UI Customer

CUSTOMER
PROVIDER
EMPLOYER
STAFF
HELP

Customer Search **Customer Detail** Comp Assess Services

Malinak, Case N. SSN: OSOS ID: NY010514946 1 of 1

[Gen. Info](#) [Add'l Info](#) [Objective](#) [Work Hist.](#) [Ed/Lic](#) [Skills](#) [Saved Searches](#) [Activities](#) [Comments](#) [Tests](#) [Initial Assessm](#)

Customer Data

SSN: 999-99-9999 N/A Status: Pending Job Seeker: Inactive

Username: 011115137 Password: SF4780

Last Name: FITZF First Name: ANIE MI: A

Date of Birth: 11/23/1987 Gender: Female

Address: 22 FIRST STREET DOWN

City: State: New York

Zip Code: 12801 County: Warren

Country: United States Metro: Fax: Phone: 518-232-9980 Alt: Email: U.S. Citizen:

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

HS + 1 yr coll. or voc/tech - no degree

School Status

Not attending school: H.S. Graduate

Employment Status

Not Employed

Contact Preferences

Use Postal Fax

Pri. Phone Email

Alt. Phone

Customer Assignment

Staff Assigned: TCC, Add Change Registered: 06/25/2010

Origin: Legacy

Agency: Department of Labor Change Profiled: Profiled Date:

Claimant: None (Not Claiming UI) Inet Resume Confidential

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



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Let's look at how a UI customer's registration looks when input from TCC.

<< Gen. Info **Add'l Info** Objective Work list. Ed.Lic Skills Saved Searches Activities Comments Tests Initial Assessment >>

Programs
 Programs/Public Assistance Selection

Income Status
 Lower Living Standard N/A
 Income 70% SIL N/A
 Local Priority N/A
 Disability Status Not Disabled
 Migrant / Seasonal Worker Yes

Employment Preferences
 Work Week
 Duration
 Salary
 Pay Unit
 Date Available

Military Service
 Service Veteran

Customer List Participation
 List Name

Programs and Public Assistance - Webpage Dialog

| Programs | Date | PUBLIC ASSISTANCE | Date |
|---|------|---|------|
| Wagner-Peyser | | TANF | |
| WIA - ADULT | | TANF Enhancer | |
| WIA - Older Youth | | GA-General Assistance (State/Local) | |
| WIA - Younger Youth | | ICA-Refugee Cash Assistance | |
| Welfare (TDF) | | SSI-Supplemental Security Income | |
| Dislocated Worker | | Food Stamps | |
| UI - Unemployment Insurance | | SSDI - Social Security Disability Insurance | |
| UI - 999 Unemployment Insurance | | | |
| UI Reemployment | | | |
| Vocational Rehabilitation | | | |
| Veterans Workforce Investment | | | |
| Adult Education | | | |
| IAW/Ta-Ta | | | |
| Trade Adjustment Assistance (TAA) | | | |
| Rapid Response | | | |
| TANF E&T | | | |
| Food Stamps E & T | | | |
| Job Corps | | | |
| Native American | | | |
| Older Americans Title VI | | | |
| Community Services Block Grant | | | |
| Employment & Training | | | |
| YouthBuild | | | |
| Displaced Homemaker | | | |
| Other WIA Programs | | | |
| Other non-WIA Programs | | | |
| National Partnership Jobs Program | | | |
| Vocational Education | | | |
| Veterans Labor Exchange | | | |
| Katrina Relief Program | | | |
| WIFRED | | | |
| VR & E - Vocational Rehabilitation & Employment | | | |

Save Start Match **Display** **Compare**

To List Remove

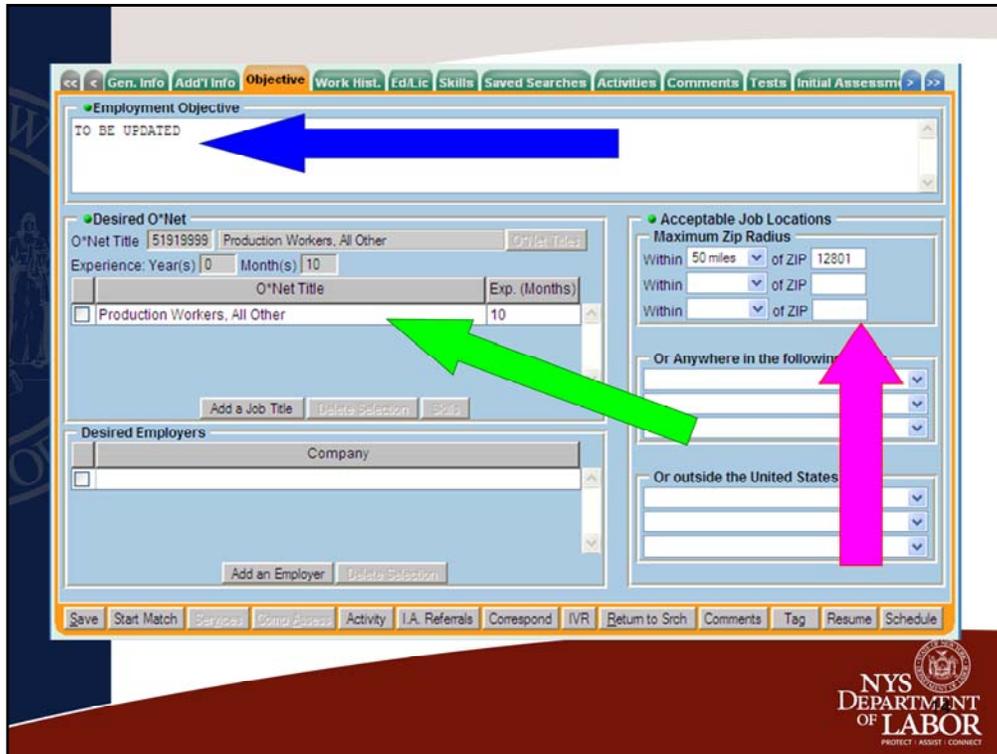
Tag Resume Schedule

Submit Cancel



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Employment Objective – not collected by UI

Must be updated to an actual employment objective!!!

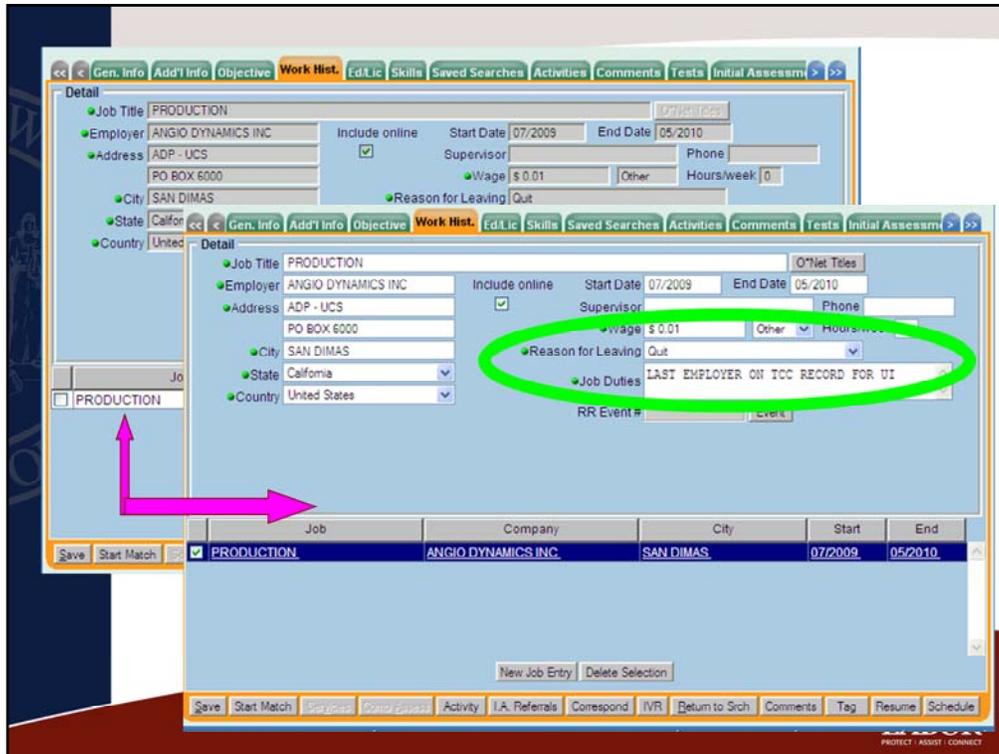
Double check the Desired Job Title – will be set to last occupation from UI Claim

May not be the actual job the customer desires based upon Initial Assessment / Counseling / Comprehensive Assessment

Update if appropriate

Sometimes Occupation may come over as unknown – delete and enter a known occupation.

Check with customer that the Radius from zip is correct – perhaps there are barriers (transportation) that will necessitate updates.



TCC process creates a Work History

To activate and make updates – highlight the appropriate row on the bottom.

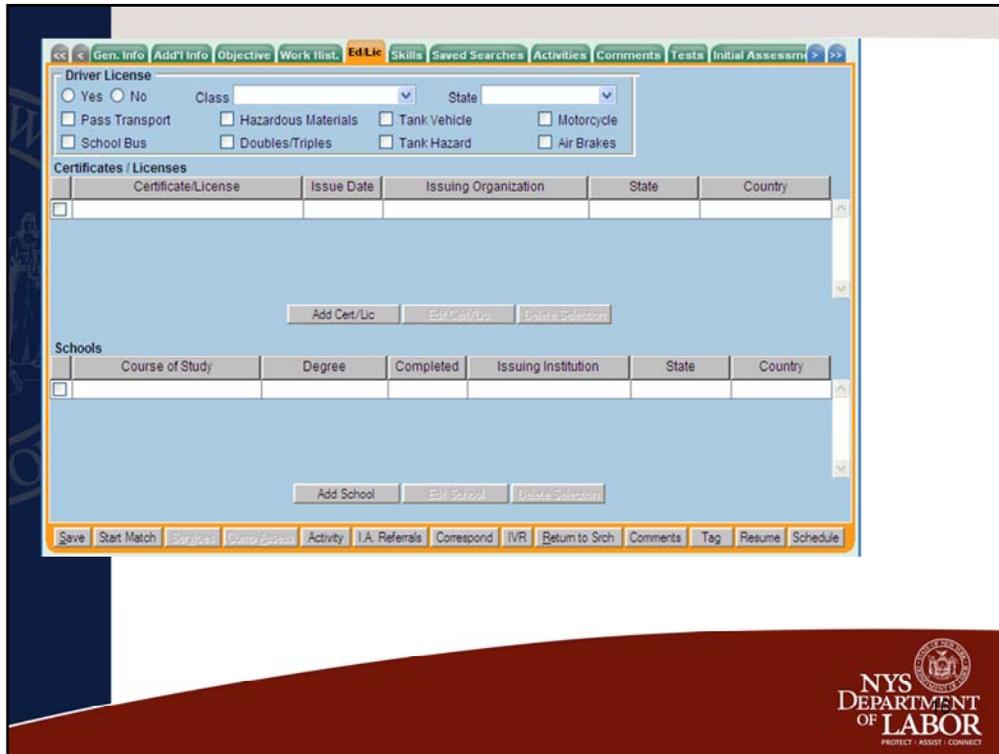
This will make the data entry fields on the top half active.

Usually, TCC records will have Reason for Leaving set to “Lack of Work” – if customer is a Dislocated Worker – please select appropriate category of DLW

- 1 Exhaustee**
- 2 None (not claiming UI)**
- 3 Other (Temp. Layoff or Perm. Deferred)**
- 4 Seek (Subject to Work Search)**

If customer is dislocated due to foreign trade (DLW) – indicate so.

Job duties may be updated as well.

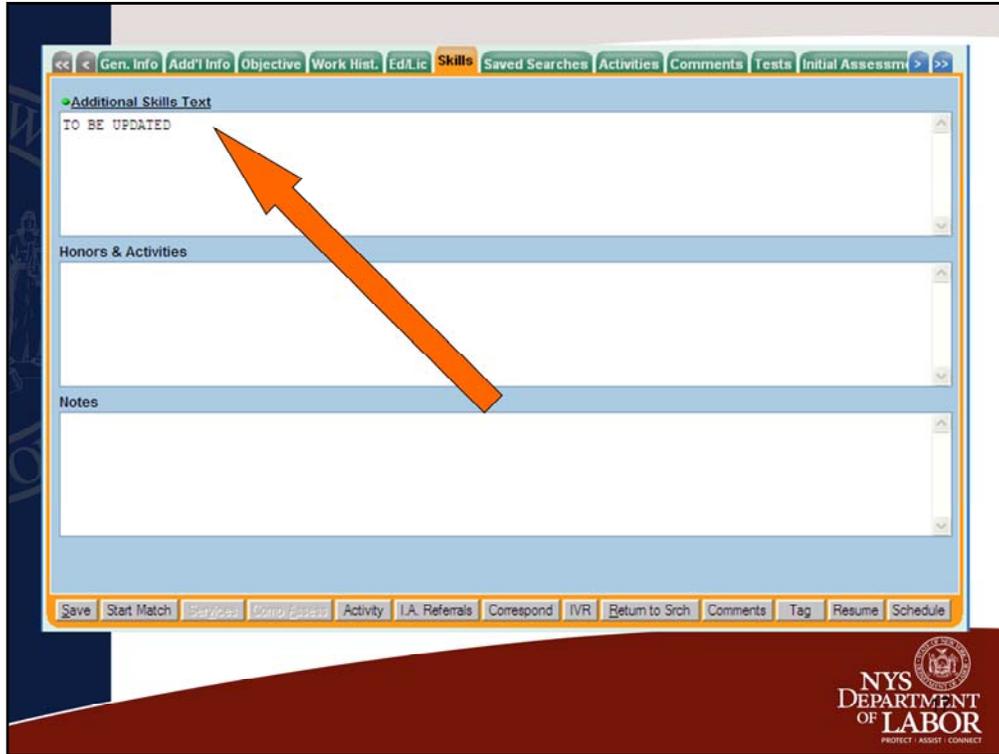


If you have driver's license info – update

Same for Certificates / Licenses (Occupational Related)

And

For Schooling



There must be description of customer's skills.

In addition – back on Objective Tab – Desired O*net Title – you may select pre-defined O*net skills

Customer Data

SSN: 999-99-9999 N/A Status: Active Job Seeker: Active

Username: 011106504 Password: IK5972

Last Name: KRAS First Name: A MI S

Date of Birth: 02/05/1968 Gender: Female

Address: 4214 COURTRYALE ST 9

City: SCHENECTADY State: New York

Zip Code: 12304 County: Schenectady

Country: United States Metro:

Phone: 917-400-0726 Alt: Fax:

Email:

U.S. Citizen:

Customer Assignment

Staff Assigned: TCC, Update

Registered: 06/18/2010

Origin: Staff

Agency: Department of Labor

Profiled:

Profiled Date:

UI Claimant: None (Not Claiming UI) 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

Masters Degree

School Status

Not attending school, H.S. Graduate

Employment Status

Not Employed

Contact Preferences

Use Postal Fax

Pri. Phone Email

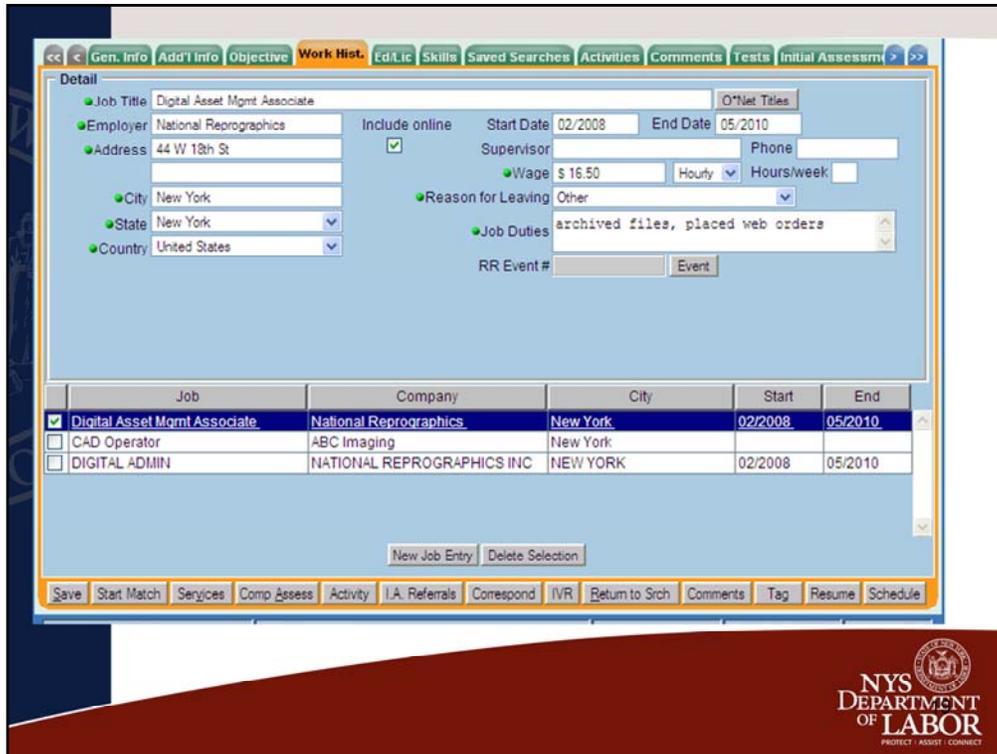
Alt. Phone

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

TCC Update UI Customer Record

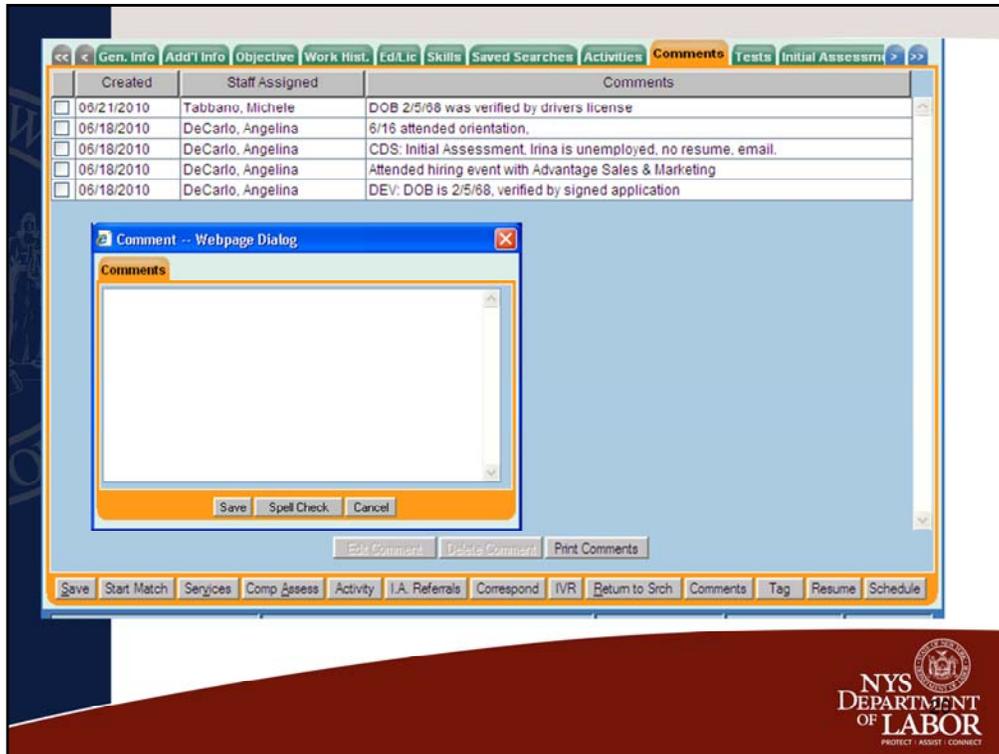
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Some differences of the TCC process is only updating a customer's registration that already existed in NYOSOS



In this case you may see duplicates of the Work History

TCC Process does not check to see if the specific Work History record exists, it simply creates a new record.



Use comments to review what has happened with the customer to-date.

To enter comments – click on Comments Button

Pop-up window appears

Type in comment – more to come later in the presentation😊

Click on Comments Save Button.

The screenshot shows a web-based customer profile form for 'Malinak, First' with OSOS ID: NY000260007. The form is divided into several sections:

- Customer Data:** Includes fields for SSN (N/A), Status (Active), Job Seeker (Inactive), Username (bubbabubbabubba), Password (123456), Last Name (Malinak), First Name (First), MI, Date of Birth (05/12/1991), Address (123 Versa St.), City (Albany), State (New York), Zip Code (12205), Country (United States), Metro, Phone, Alt, Fax, Email, and U.S. Citizen (checked).
- Gender:** A dropdown menu with options: Not Disclosed (selected), Female, Male, and Not Disclosed.
- Race:** A list of checkboxes: Alaskan or American Indian, Asian, Black or African American, Hawaiian or Pacific Islander, White, and Not Disclosed (checked).
- Ethnic Heritage:** Radio buttons for Hispanic or Latino, Not Hispanic or Latino, and Not Disclosed.
- Customer Assignment:** Includes Staff Assigned (Administrator, SelfService), Registered (11/18/2008), WIB Assigned (NYSDDL-CO), Origin (Self Service), Agency (Department of Labor), Office (NY9999), Profiled Date, and UI Claimant.
- Education & Employment:** Includes Education Level (10 Grade), School Status (Not attending school or H.S. Dropout), and Employment Status (Not Employed).
- Contact Preferences:** Includes checkboxes for Use Postal, Fax, Pri. Phone, Email, and Alt. Phone.

At the bottom of the form, there are buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Return to Srch, Comments, Tag, Resume, and Schedule.

“Not Disclosed” choice added to Gender and Race.

Gender is required for customer receiving L2 Services such as all Youth and those Adults and Dislocated Workers receiving an Intensive or Training service.

Gen. Info Tab

Gender

Female / Male / Not Disclosed

Race

Not Disclosed

Only by itself

All others may be checked individually or in combinations



Because NYOSOS is a case management tool

data must be updated each time a customer is served

specific items may have changed

youth – completion of another year of school?

unemployed – part-time position – work history updated?

Amount of data to be entered + forms to be data entered + human element = mistakes

How does a Manager/Supervisor check on this?

Monitor / Audit / Reviews / you call it



Customer Focused Service -- Critical Requirements

- Contact information
- Objective
- Education/Schools
- O*Net title
- Skills
- Add'l Info
 - Programs / Public Assistance
- Driver License
- Certificates/Licenses
- Work History
 - job duties
 - reason for leaving
 - salary and unit
- L1 Services (Activities)
- Comments



Complete and accurate information.

Verified with customer and when there is a time gap between services – be sure info is updated.

Employment preferences, found on the Customer Detail/Addl Info tab, needed for job search but should not be too limiting.

Never put staff notes or comments in the Notes tab under Skills.

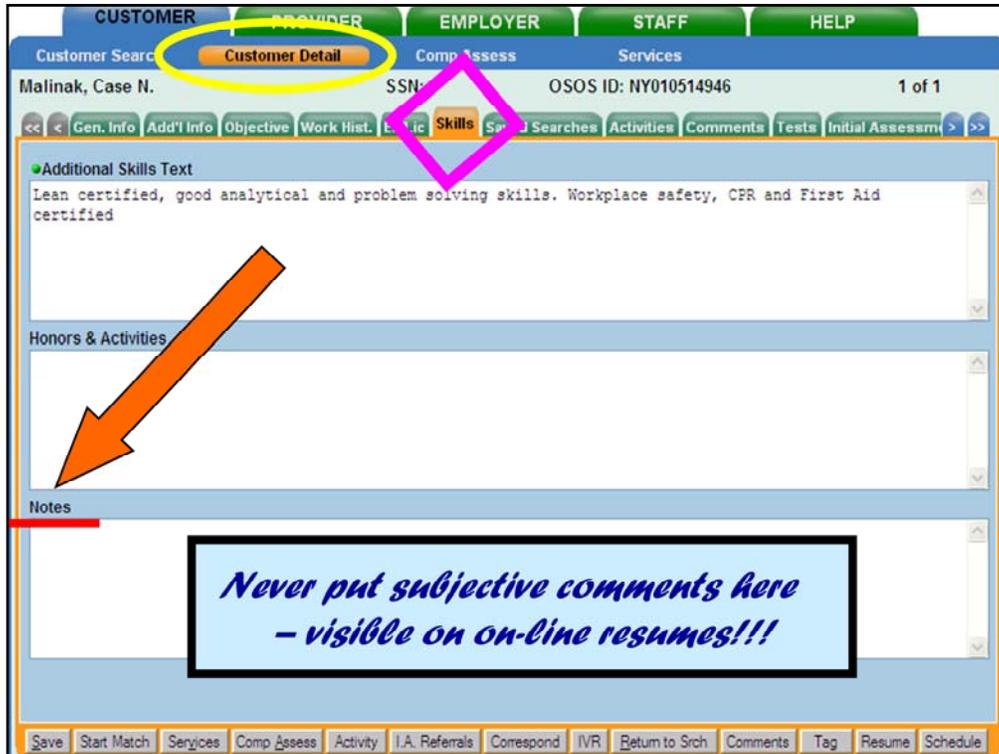
Common Problems:

Staff do not update

Staff create their own meaning for activities- do not use the activities definition guide

As of 06-18-2010 – see Technical Advisory 06-16.2 for revised L1 and L2 services.

please note these lists of services and definitions are currently under review.



The Notes section appears in the Resume created from OSOS.

This should include Other Life Activities / Experiences that do not fit elsewhere in a resume.



2 - Data Element Validation (DEV)

- **Requirements vary based on level of service**
 - self-service/info. only → none to validate
 - Staff-Assisted Core → basic demographics
 - Staff-Assisted Intensive → multiple fields
- **TA #08-8**
 REISSUED: State Policy Guidelines on Data Element Validation (DEV) under the U.S. Department of Labor Employment and Training Administration's (USDOL/ETA) Common Measures Policy and Functional Alignment
<http://www.labor.ny.gov/workforcenypartners/tas.shtm>



USDOL ETA and Federal gov't Office of Management and Budget (OMB) require a validity check on data reported to Washington, DC

Define DEV – data element validation – accounting process required by Federal govmt's OMB

Levels of Service

- Self-Service / Informational Only – no validation of any data elements
- Staff Assisted Core – DOB
- Staff Assisted Intensive -- additional fields
- Training – OH, MY GOODNESS!!!

See Technical Advisory

==Department Webpage – Workforce Services / Technical Advisories

<http://www.labor.ny.gov/workforcenypartners/tas.shtm>

Data Element Validation Checklist for New Enrollments

“Cheat Sheet” on DEV items to review when creating a new program enrollment.

When an OSOS verification screen appears indicating a new enrollment for a customer, remember to provide an initial assessment in accordance with TA 08-4.1 and validate the data elements in accordance with TA 10-4 and TA 08-8. Validation requires staff to:

1. Identify the data element information that has been validated.
2. The source used to validate the data element.
3. The pertinent data from the source document.
4. The date of the verification and staff name performing the validation.

For example: During 2/26/2010, staff person John Doe viewed Sluggo Malinak's birth certificate and validated DOB as 4/27/1957.

NOTES: DOB needs to be validated one time only.

Veteran status needs to be validated one time only. Non-veteran status may change and must be reviewed with each enrollment. If status changes to veteran, then Data Element Validation will be required where applicable.

| Data Element | LIX WIA CORE | DW CORE | INTENSIVE TRAINING | | Youth |
|--|--------------------|--------------|--|--------------|--------------|
| | | | Adult | DW | |
| Date of Birth | UI or DOC | UI or DOC | UI or DOC | UI or DOC | UI or DOC |
| Veteran Status | SA | SA | DOC | DOC | DOC |
| School Status at Participation | | | | | SA |
| Employment Status at Participation | SA | SA | DOC | DOC | DOC |
| Low Income (Lower Living Standard or Income 70% LLSIL) | SA | SA | SA | SA | SA |
| TANF | SA | SA | Doc CM | DOC CM | DOC CM |
| Other Public Assistance | SA | SA | Doc CM | DOC CM | DOC CM |
| Selective Service (Eligibility requirement and not a DEV requirement) | | | Registration Card or Website Verification | | |
| Displaced Homemaker | | SA | | | |
| Date of Actual Qualifying Dislocation | | | | DOC | |
| Offender | | | | | SA |
| Homeless Individual | | | | | SA |
| The first Staff Assisted Core Service date must be accurately recorded in OSOS for every enrollment. | | MIS | MIS | | |
| Limited English Proficiency (Eligibility requirement and not a DEV requirement) | | | | | |
| Single Parent (Eligibility requirement and not a DEV requirement) | | | | | |
| Youth Who Needs Additional Assistance | | | | | SA |
| Basic Literacy Skills Deficiency | | | | | DOC |
| Pregnant or Parenting Youth | | | | | SA |
| Foster Care Youth | | | | | DOC |
| The first Youth Service date must be accurately recorded in OSOS for every enrollment. | | | | | MIS |
| The first Intensive or training Service date must be accurately recorded in OSOS for every enrollment. | | | MIS | MIS | |

Trade Adjustment Assistance Enrollment
(Includes all the above DW requirements plus the following:)

| Data | DW |
|----------------------------------|-----|
| Trade Readjustment Allowance | UI |
| Date of Application | DOC |
| Petition Number | DOC |
| Waiver from Training requirement | MIS |

Legend

SA: Self Attestation
 DOC: Documentation required
 UI: Unemployment Insurance verification
 CM: Cross Match
 MIS: State Management Information System

Due to NYSDOL’s Functional Alignment processes and policies – most staff will rarely see a WIA or TAA EV webpage dialog box.

For most part – staff will need to understand which fields must be validated by the various service levels

- ss/io – nothing
- Core / Staff Assisted Core – some basic demographics
- Intensive Services – additional requirements
- Training services – even more additional requirements
- Receiving Training == many more fields now required.

We have prepared a cheat sheet for front line staff to use while at their desks.

| Data Element | LEX WIA CORE | DW CORE | INTENSIVE TRAINING | | Youth |
|--|--------------------|--------------|--|--------------|--------------|
| | | | Adult | DW | |
| Date of Birth | UI or DOC | UI or DOC | UI or DOC | UI or DOC | UI or DOC |
| Veteran Status | SA | SA | DOC | DOC | DOC |
| School Status at Participation | | | | | SA |
| Employment Status at Participation | SA | SA | DOC | DOC | DOC |
| Low Income (Lower Living Standard or Income 70% LLSIL) | SA | SA | SA | SA | SA |
| TANF | SA | SA | Doc CM | DOC CM | DOC CM |
| Other Public Assistance | SA | SA | Doc CM | DOC CM | DOC CM |
| Selective Service (Eligibility requirement and not a DEV requirement) | | | Registration Card or Website Verification | | |
| Displaced Homemaker | | SA | | DOC | |
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Legend

SA: Self Attestation

DOC: Documentation required

UI: Unemployment Insurance verification

CM: Cross Match

MIS: State Management Information System

3 - Recording Effective Case Notes

Case Notes / Comments

- Provides a picture of who the customer is and the factors that will effect his/her employment.
- Provides an ongoing record of customer movement through the workforce system



Think of Comments as the finishing touches on the painting

Creating shadows and areas of light – or movement



Recording Effective Case Notes

- Case management notations
 - justification of service provision
 - outcomes / next steps
 - data element (DEV) notations
 - policy notations – documentation
- Records must reflect frequency and detail of services provided to all participants
 - WIA / LEX / VETS / TAA
- Case notes leave an electronic trail and assists in program data validation and monitoring
 - Local / State / Federal
- Results in *Accountability*



Accountability

system to customer

staff to supervisor

program to “fundors”

- congress

- state legislators

Writing Case Notes

- Indicate what was
 - Accomplished
 - Learned
 - Achieved
 - ***DON'T** → just repeat service name*
- 3 component acronym may be helpful
 - PAR = Problem, Action, Result
 - situation, assessment, next steps



Writing Case Notes

- Be specific, brief, and to the point.
- Write in professional, objective and factual language.
- Show logical customer progression, relevancy.



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If customer has had a lag in services for 6 months,

fill in the gap,

where were they?

What was happening?

were they working or unsuccessfully job searching?

Were they resolving issues/barriers, i.e.. Child care, medical problems?

Writing Case Notes

- When referring to customer barriers to employment, keep focus on and relate to *customer's employment goals*
- Specify the functional capacities relating to the occupation under consideration
(e.g., Customer may lift up to 10 pounds.)



Managing Case Notes

- **Comments**
 - Customer Detail and Services combined
 - Visible in both Modules
 - Staff may edit their own comments
 - Supervisors with Delete security can edit other staff comments



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Big Improvement in Comments Changes.

4 - Recording L1 Services (Activity Button)

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search **Customer Detail** Comp Assess Services

Malinak, Case N. SSN: OSOS ID: NY010514946 1 of 1

[Gen. Info](#) [Add'l Info](#) [Objective](#) [Work Hist.](#) [Ed. Lic](#) [Skills](#) [Saved Searches](#) [Activities](#) [Comments](#) [Tests](#) [Initial Assessm](#)

Customer Data

SSN: 999-99-9999 N/A Status: Pending Job Seeker: Inactive
 Username: 011115137 Password: SF4780
 Last Name: FITZ ██████ First Name: STE ██████ MI: A
 Date of Birth: 11/23/1987 Gender: Female
 Address: 22 FIRST STREET DOWN
 City: ██████ State: New York County: Warren
 Zip Code: 12801 Country: United States Metro:
 Phone: 518-232-9980 Alt: Fax:
 Email:
 U.S. Citizen

Customer Assignment

Staff Assigned: TCC, Add Registered: 06/25/2010
 WIB Assigned: Saratoga/Warren/Washington Counties Origin: Legacy
 Agency: Department of Labor Profiled
 Office: GLENS FALLS Profiled Date:
 UI Claimant: None (Not Claiming UI) 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: HS + 1 yr coll. or voc/tech - no degree
 School Status: Not attending school; H.S. Graduate
 Employment Status: Not Employed

Contact Preferences

Use Postal Fax
 Pri. Phone Email
 Alt. Phone



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Recording L1 Services (Activities)

- **Record actual services**
 - Not administrative tasks
- **Comments = Case management**
 - Result / outcome of specific service
 - Next steps?
 - Other?



**Case Management Tool paints a picture of what the customer has experienced
NOT**

Tasks the staff member performs!

Mass mailing (postal or email) – not a service

Calling and checking on how customer is doing – not a service

If action items for customer comes from call, e.g., needs supportive services and this is initiated – enter

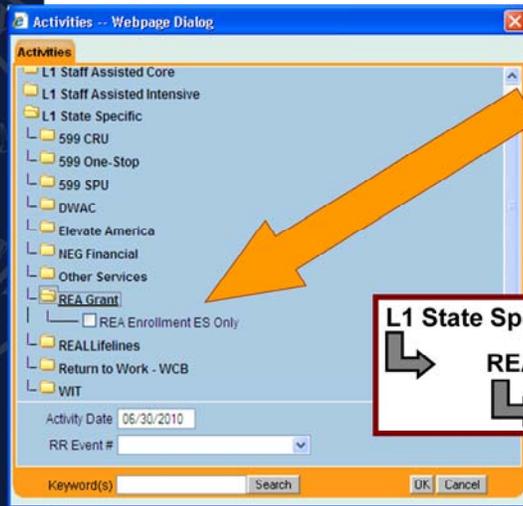
the service == referred to supportive services

Comments may reflect a pertinent administrative task performed by the staff for the client's benefit – but no represent a specific service.

Recording L1 Services (Activities)

The image displays three overlapping windows titled "Activities -- Webpage Dialog". Each window shows a hierarchical tree of service categories. The leftmost window has a yellow arrow pointing to "L1 State Specific". The middle window has a pink arrow pointing to "Counseling". The rightmost window has an orange arrow pointing to "Career Guidance - Core". Below the tree in each window are fields for "Activity Date" (set to 06/29/2010), "RR Event #", and "Keyword(s)". At the bottom right of the rightmost window are "Search", "OK", and "Cancel" buttons. The logo "LEARN PROJECT | ADJUST | CONNECT" is visible at the bottom right of the entire image.

Recording L1 Services (Activities)



Please Note: This is an automatic entry into NYOSOS subsequent to entering Attendance Results in REOS

L1 State Specific
L1 State Specific
 REA Grant
 REA Enrollment ES Only



5 - Program Enrollment Basics

- **Program Enrollments**
 - Employment Services (ES) or Labor Exchange (LEX)
 - Workforce Investment Act (WIA)
 - Trade Act (TAA)
- **History**
 - Siloed Programs
 - PY2006 – NYSDOL's Functional Alignment Policy
 - Based on individual staff's function in office not who pays the staff's salary



As much as possible – reduce paperwork

Can real-time data entry into NYOSOS work in your functional area?

What perception is caused by handing out blank forms to be filled?



Program Enrollment Basics

- **Functional Alignment Batch Job**
 - Create LEX enrollment
 - Overnight (or 3 nights) also creates WIA enrollment
 - Co-enrolled in both programs
 - In Performance Measures for both programs
 - In State Customer Service Indicators based on services received – not program providing
- **Create New Enrollment – Verify Data**



As much as possible – reduce paperwork

Can real-time data entry into NYOSOS work in your functional area?

What perception is caused by handing out blank forms to be filled?



Enrollment Verification

- **Verification – Web Dialog box “pops-up”**
 - When saving 1st service
 - Creating a new program enrollment
 - LEX
 - WIA
 - TAA
 - **Most staff will see LEX** (Functional Alignment Batch Job is an Overnight Process that will includes the WIA enrollment)
 - **WIA Youth will see WIA**
 - **TAA staff will see TAA**



HUGE IMPROVEMENT!

Verification that staff really wants to create an enrollment

Enrollments are listed by Federal Program

1. Labor Exchange / Wagner-Peyser / ES = LEX enrollment
L1 Services
 2. WIA Youth – L2 Services
 3. WIA Adult / DLW – created via Functional Alignment Batch Job (FABJ) –
overnight – staff will not have chance to verify enrollment
- so . .

Managers/supervisors/staff – thinking cap time – best way to ensure that appropriate data values are being captured for all programs for DATA ELEMENT VALIDATION.



Enrollment Verification

- See EV screen →

!! WARNING !! THINK !!

- New enrollment (Participation)
 - Starts Performance Tracking – state and federal
- Initial Assessment exists
 - for this enrollment?
- Backing out if need be
- Updating specific fields
 - Without navigating back to previous pages



Uses

Procedurally - see screen /

THINK

Assessment Interview - Initial

Assessment

creating enrollment

IA Exists:

No - Cancel and Provide IA prior to

Yes - Next Step

Data Element Verification

-- Are "at-time-of-participation" data values correct

Verification - Web Dialog box "pops-up" When saving 1st service

Creating a new program enrollment- LEX WIA TAA

Most staff will see LEX (Functional Alignment Batch Job - Overnight Process)

WIA Youth will see WIA

TAA staff will see TAA

Are "at-time-of-participation" data values correct? Check for all Programs (FABJ)

Yes - click on "OK" button

No - correct values on Verification - Web Dialog box

2 Tabs if Comp Assess was completed

Click on "OK" button

Changes made on Enrollment Record (reporting)

Changes made on respective screens

Enrollment Verification

- Are “at-time-of-participation” data values correct
 - Check for all Programs (FABJ)
 - Yes – click on “OK” button
 - No – correct values on Verification – Web Dialog box
 - 2 Tabs if Comp Assess was completed
 - Click on “OK” button
 - » Changes made on Enrollment Record (reporting)
 - » Changes made on respective screens



DATA ELEMENT VALIDATION

happens at-time-of-participation

6 - Match/Refer – Customer to Job

- **Multi-step process**
- **Choose individual customer**
- **Click on Start Match**
 - Navigates to Job Order Search screen
- **Gen. Info Tab**
 - Review and update criteria/parameters
- **Job Detail Tab**
 - Review and update criteria/paramters
- **Click “Search” button**



As much as possible – reduce paperwork

Can real-time data entry into NYOSOS work in your functional area?

What perception is caused by handing out blank forms to be filled?

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search **Customer Detail** Comp Assess Services

Malinak, Case N. SSN: OSOS ID: NY010514946 1 of 1

Gen. Info Add'l Info Objective Work Hist. Ed.Lic Skills Saved Searches Activities Comments Tests Initial Assessment

Customer Data

SSN: N/A Status: Active Job Seeker: Active

Username: malin0001 Password: casenote

Last Name: Malinak First Name: Case MI N

Date of Birth: 06/16/1967 Gender: Male

Address: 1313 Mockingbird Lane

City: Mockingbird Heights State: New York

Zip Code: 12240 County: Metro

Country: United States

Phone: 212-555-0101 Alt: Fax:

Email: casenote@OSOS.net

U.S. Citizen

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 - HS Graduate

School Status: Not attending school: H.S. Graduate

Employment Status: Not Employed

Contact Preferences

Use Postal Fax

Pri. Phone Email

Alt. Phone

Customer Assignment

Staff Assigned: DOUGLAS-DUFFY, KERRY Registered: 06/15/2009

WIB Assigned: Albany/Rensselaer/Schenectady Counties Origin: Staff

Agency: Department of Labor Profiled:

Office: ALBANY Profiled Date:

UI Classification: None (Not Claiming UI) Internet Resume: Confidential:

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



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

Employer Search Employer Detail **Job Order Search** Job Order Detail

Quick Search General Info Job Detail List Search Custom

Job Order #

- JO 1
- JO 2
- JO 3
- JO 4
- JO 5
- JO 6
- JO 7
- JO 8
- JO 9

Origination ID

- ID 1
- ID 2
- ID 3
- ID 4
- ID 5
- ID 6
- ID 7
- ID 8
- ID 9

| <input type="checkbox"/> | Company | Title | Order# | Date | Status | Age | OR/MD | OR ID | #D | #R | #O | #H |
|--------------------------|---------|-------|--------|------|--------|-----|-------|-------|----|----|----|----|
| <input type="checkbox"/> | | | | | | | | | | | | |

25 Search Clear Detail Print List Comments Date Search Filter by List Post Match Filter

NYS DEPARTMENT OF LABOR
PROTECT • ADJUST • CONNECT

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

Employer Search | Employer Detail | **Job Order Search** | Job Order Detail

Quick Search | **General Info** | Jobs | Advanced Search | Custom

Origination: [Dropdown] | Order Status: Open [Dropdown]
 Emp Job Title: [Text] | Emp Req #: [Text] | Job Order Date From: [Text] Thru: [Text]
 Source (State): [Dropdown] | Source (Fed): [Dropdown] | Last Open Date From: [Text] Thru: [Text]
 O*Net Title: 15104100 Computer Support Specialists | O*Net Titles: [Dropdown]
 Category: [Dropdown] | Staff Assigned: [Text] | Change: [Button]
 WIB: [Dropdown] | Office: [Text] | [Dropdown]

Employer Information
 Employer ID: [Text]
 Company Name: [Text]
 Ownership: [Dropdown]
 NAICS: [Text]

Contact Information
 Contact Last Name: [Text]
 Suppressed: [Dropdown]
 Email URL Fax
 Phone Mail In Person

Job Location
 City: [Text]
 County: [Dropdown]
 Zip: 12240 | Radius: 50 miles [Dropdown]

| <input type="checkbox"/> | Company | Title | Order# | Date | Status | Age | OR/MD | OR ID | #D | #R | #O | #H |
|--------------------------|---------|-------|--------|------|--------|-----|-------|-------|----|----|----|----|
| <input type="checkbox"/> | | | | | | | | | | | | |

25 [Dropdown] | Search | Clear | Detail | Prev List | Comments | Save Search | Submit to List | Print Match | Refresh

NYS DEPARTMENT OF LABOR
 PROTECT • ADJUST • CONNECT

The screenshot displays the 'Job Order Search' interface within the NYS Department of Labor system. The top navigation bar includes 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. Below this, there are tabs for 'Employer Search', 'Employer Detail', 'Job Order Search' (which is active), and 'Job Order Detail'. The 'Job Order Search' tab is further divided into 'Quick Search', 'General', 'Job Detail' (highlighted with a red circle), 'Job Search', and 'Custom'. The 'Job Detail' section contains various filters and options, including 'Full Time', 'Part Time', 'Regular', 'Seasonal', 'Temporary', 'Short Term', 'Hours Per Week', 'Education Required', 'Experience Required', 'Public Transportation', 'Starting Pay' (Minimum, Maximum, Unit), and 'Benefits' (Health Insurance, Dental Insurance, Vacation, Sick Leave, Holidays, Retirement/Pension Plan, Clothing/Uniform Allowance, Child Care). Below the filters is a table with columns: Company, Title, Order#, Date, Status, Age, OR/MD, OR ID, #D, #R, #O, #H. At the bottom of the form, there is a '25' dropdown, a 'Search' button (indicated by a green arrow), and other buttons like 'Clear', 'Print List', 'Comments', 'Save Search', 'Add to List', 'Print Match', and 'Pause'. The NYS Department of Labor logo is visible in the bottom right corner.

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

Employer Search Employer Detail **Job Order Search** Job Order Detail

No Matches Found

Quick Search General Info **Job Detail** List Search Custom

Full Time: Yes First Shift: Starting Pay:
Part Time: Second Shift: Minimum:
Regular: Yes Third Shift: Yes Maximum:
Seasonal: Rotating Shift: Unit:
Temporary: Split Shift:
Short Term: Shift Varies:
Hours Per Week:
Education Required: Less Than or Equal High School Diploma Retirement: Pension Plan:
Experience Required: 0 Years 4 Months Clothing/Uniform Allowance:
Public Transportation: Child Care:

| <input type="checkbox"/> | Company | Title | Ord | OR/MD | OR ID | #D | #R | #O | #H |
|--------------------------|---------|-------|-----|-------|-------|----|----|----|----|
| <input type="checkbox"/> | | | | | | | | | |

25 Search Clear

NYS DEPARTMENT OF LABOR
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The screenshot displays the 'Job Order Search' interface within the NYS Department of Labor system. The interface is organized into several sections:

- Navigation Bar:** Includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Employer Search, Employer Detail, Job Order Search (active), and Job Order Detail.
- Form Section:**
 - Quick Search:** Contains dropdown menus for Full Time, Part Time, Regular, Seasonal, Temporary, and Short Term.
 - Shifts:** Contains dropdown menus for First Shift, Second Shift, Third Shift, Rotating Shift, Split Shift, and Shift Varies.
 - Starting Pay:** Includes input fields for Minimum, Maximum, and Unit.
 - Benefits:** A list of checkboxes for Health Insurance, Dental Insurance, Vacation, Sick Leave, Holidays, Retirement/Pension Plan, Clothing/Uniform Allowance, and Child Care.
 - Education Required:** A dropdown menu set to 'Greater Than or Equal' and a dropdown for 'High School Diploma'.
 - Experience Required:** Input fields for '0' Years and '0' Months.
 - Public Transportation:** A dropdown menu.
- Table:** A table with columns: Company, Title, Order#, Date, Status, Age, OR/MD, OR ID, #D, #R, #O, #H. The table is currently empty.
- Footer:** A row of buttons including Search, Clear, Update, Print List, Comments, Save Search, Filter to List, Post Match, and Filter.

The NYS Department of Labor logo is located in the bottom right corner of the page, with the tagline 'PROTECT • ADJUST • CONNECT'.

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

Employer Search | Employer Detail | **Job Order Search** | Job Order Detail

1 - 5 of 5

Quick Search | General Info | **Job Detail** | List Search | Custom

Full Time | First Shift
 Part Time | Second Shift
 Regular | Third Shift
 Seasonal | Rotating Shift
 Temporary | Split Shift
 Short Term | Shift Varies
 Hours Per Week: /
 Education Required: Greater Than or Equal High School Diploma
 Experience Required: 0 Years 0 Months
 Public Transportation:

Starting Pay
 Minimum:
 Maximum:
 Unit:

Benefits
 Health Insurance
 Dental Insurance
 Vacation
 Sick Leave
 Holidays
 Retirement/Pension Plan
 Clothing/Uniform Allowance
 Child Care

| <input type="checkbox"/> | Company | Title | Order# | Date | Status | Age | OR/MD | OR ID | #D | #R | #O | #H |
|--------------------------|-----------------|---------------------------|-----------|------------|--------|-----|----------|-----------|----|----|----|----|
| <input type="checkbox"/> | CHA | Help Desk Coordinator | JE4586713 | 03/25/2010 | Open | 96 | AJE - On | 517430219 | 0 | 1 | 0 | |
| <input type="checkbox"/> | Empire State | Technical Support Special | JE4227779 | 01/09/2010 | Open | 171 | AJE - On | 520044750 | 0 | 1 | 0 | |
| <input type="checkbox"/> | InfoEweb Inc | Database Analyst/Program | JE4806610 | 06/09/2010 | Open | 20 | AJE - On | 524688430 | 0 | 1 | 0 | |
| <input type="checkbox"/> | The College of | Help Desk Technician | JE4581071 | 03/24/2010 | Open | 97 | AJE - On | 531271262 | 0 | 1 | 0 | |
| <input type="checkbox"/> | U.S. District C | Help Desk Technician | JE4525114 | 03/16/2010 | Open | 105 | AJE - On | 529666417 | 0 | 2 | 0 | |

25

NYS DEPARTMENT OF LABOR
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The screenshot shows the 'Job Order Search' interface with a 'Save Search -- Webpage Dialog' overlaid. The dialog contains a 'Search Name' field with the text 'computer support spclst' and 'Submit' and 'Cancel' buttons. A yellow arrow points to the 'Submit' button in the dialog. A pink arrow points to the 'Save Search' button in the main interface's footer.

| | Title | Order# | Date | Status | CR# | CR# | #O | #R | #O | #H |
|--------------------------|--|-----------|------------|--------|-----------|-----------|----|----|----|----|
| <input type="checkbox"/> | CHA Help Desk Coordinator | JE4586713 | 03/25/2011 | Open | AJE - Onl | 517430219 | 0 | 1 | 0 | |
| <input type="checkbox"/> | Empire State Technical Support Special | JE4227779 | 01/09/2011 | Open | AJE - Onl | 520044750 | 0 | 1 | 0 | |
| <input type="checkbox"/> | InfoEweb Inc. Database Analyst/Program | JE4806610 | 06/09/2011 | Open | AJE - Onl | 524688430 | 0 | 1 | 0 | |
| <input type="checkbox"/> | The College of Help Desk Technician | JE4581071 | 03/24/2011 | Open | AJE - Onl | 531271262 | 0 | 1 | 0 | |
| <input type="checkbox"/> | U.S. District C Help Desk Technician | JE4525114 | 03/16/2011 | Open | AJE - Onl | 529666417 | 0 | 2 | 0 | |

The screenshot displays a web application interface for the NYS Department of Labor. At the top, there are navigation tabs for 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. Below these, there are sub-tabs for 'Customer Search', 'Customer Detail', 'Comp Assess', and 'Services'. The 'Customer Detail' tab is active, showing 'Malinak, Case N.' and 'OSOS ID: NY010514946'. A secondary set of tabs includes 'Gen. Info', 'Add'l Info', 'Objective', 'Work Hist.', 'Ed.Lic', 'Skills', 'Saved Searches', 'Activities', 'Comments', and 'Tests'. The 'Saved Searches' tab is selected, displaying a table with one entry: 'computer support spcdst'. A pink arrow points to the 'Name' column header of this table. At the bottom of the interface, there is a 'Re-run Search' button and a row of navigation buttons: 'Save', 'Start Match', 'Services', 'Comp Assess', 'Activity', 'I.A. Referrals', 'Correspond', 'IVR', 'Return to Srch', 'Comments', 'Tag', 'Resume', and 'Schedule'. The NYS Department of Labor logo is visible in the bottom right corner.

CUSTOMER PROVIDER **EMPLOYER** STAFF HELP
 Employer Search Employer Detail **Job Order Search** Job Order Detail
 1 - 5 of 5
 Quick Search General Info **Job Detail** List Search Custom

Full Time First Shift
 Part Time Second Shift
 Regular Third Shift
 Seasonal Rotating Shift
 Temporary Split Shift
 Short Term Shift Varies
 Hours Per Week:
 Education Required: Greater Than or Equal to School Diploma
 Experience Required: 0 Year Months
 Public Transportation:

Starting Pay
 Minimum:
 Maximum:
 Unit:

Benefits
 Health Insurance
 Dental Insurance
 Vacation
 Sick Leave
 Holidays
 Retirement/Pension Plan
 Clothing/Uniform Allowance
 Child Care

| <input type="checkbox"/> | Company | Title | Order# | Date | Sta | Age | OR/MD | OR ID | #D | #R | #O | #H |
|-------------------------------------|---------------------|--------------------------|-----------|------------|------|-----|--------------|-----------|----|----|----|----|
| <input checked="" type="checkbox"/> | CHA | Help Desk Coordinator | JE4586713 | 03/25/2010 | Open | 96 | AJE - Online | 517430219 | 0 | 1 | 0 | 0 |
| <input type="checkbox"/> | Empire State Coll | Technical Support Specia | JE4227779 | 01/09/2010 | Open | 171 | AJE - Online | 520044750 | 0 | 1 | 0 | 0 |
| <input type="checkbox"/> | InfoEweb Inc | Database Analyst Program | JE4806610 | 06/09/2010 | Open | 20 | AJE - Online | 524688430 | 0 | 1 | 0 | 0 |
| <input type="checkbox"/> | The College of Sal | Help Desk Technician | JE4581071 | 03/24/2010 | Open | 97 | AJE - Online | 531271262 | 0 | 1 | 0 | 0 |
| <input type="checkbox"/> | U.S. District Court | Help Desk Technician | JE4525114 | 03/16/2010 | Open | 105 | AJE - Online | 529666417 | 0 | 2 | 0 | 0 |

25 Search Clear Detail Print List Comments Save Search Assign to List Post Match Refer

CUSTOMER PROVIDER EMPLOYER STAFF

Employer Search Employee Detail Job Order Search Job Order Detail

CHA 1 of 1

General Info Contact Info Job Detail Job Description Comments Matches Referrals Saved Searches Audit

Employer Information

Company CHA

Ownership

FEIN 14-1621922 State EIN

Order Date 03/25/2010

Status Date 03/25/2010

Agency Department of Labor

- Be sure to review Job Order specifics are appropriate for customer before moving onto Referral Process.
- General Info
- Job Detail
- Job Description

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• Highlight Job Order
• Click on "Post Match" button

NYS DEPARTMENT OF LABOR
 PROTECT • ASSIST • CONNECT

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

Malinak, Case N. SSN: OSOS ID: NY010514946 1 of 1

| Activity | Activity Date | Office | Staff | Employer | Job ID | SA |
|---|---------------|-------------------|---------------------|------------------|-----------|-----|
| <input checked="" type="checkbox"/> Match | 06/28/2010 | NY9999 | Brooks, John | Taconic Farms | NY0946084 | |
| <input type="checkbox"/> Not Hired | 06/26/2010 | NY9999 | Administrator, Batc | Schenectady Comr | JE4037279 | |
| <input type="checkbox"/> WIA Enrollment | 06/25/2010 | Cortland Works Ca | Sandwick, Robin | | | Yes |
| <input type="checkbox"/> Common Measures Enrollment | 06/25/2010 | Cortland Works Ca | Sandwick, Robin | | | Yes |
| <input type="checkbox"/> Labor Exchange Enrollment | 06/25/2010 | Cortland Works Ca | Sandwick, Robin | | | Yes |
| <input type="checkbox"/> Assessment Interview, Initial Assessment | 06/25/2010 | Cortland Works Ca | Sandwick, Robin | | | |
| <input type="checkbox"/> Interstate Job Referral | 03/15/2010 | NY9999 | DOUGLAS-DUFFY | Schenectady Comr | JE4037279 | |

Adds "Match" L1 Service (Activity) to Customer's record

- visible in Customer Detail Window / Activities Tab
- visible in Services Window / Service History Tab

Adds Customer to Job Order Window / Match Tab

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[CUSTOMER](#)
[PROVIDER](#)
[EMPLOYER](#)
[STAFF](#)
[HELP](#)

[Employer Search](#)
[Employer Detail](#)
[Job Order Search](#)
[Job Order Detail](#)

CHA Order#: JE4586713 ID: NY008050325 1 of 1

[General Info](#)
[Contact Info](#)
[Job Detail](#)
[Job Description](#)
[Comments](#)
[Matches](#)
[Referrals](#)
[Saved Searches](#)
[Audit](#)

| <input type="checkbox"/> | Match | Staff | SSN | Job Seeker | Vet |
|--------------------------|------------|--------------|-----|---------------|-----|
| <input type="checkbox"/> | 05/28/2010 | Brooks, John | - | Malinak, Case | No |



NYS DEPARTMENT OF LABOR

PROTECT • ADJUST • CONNECT

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

Employer Search Employer Detail **Job Order Search** Job Order Detail

1 - 5 of 5

Quick Search General Info **Job Detail** List Search Custom

Full Time First Shift Starting Pay
 Part Time Second Shift Minimum
 Regular Third Shift Maximum
 Seasonal Rotating Shift Unit
 Temporary Split Shift
 Short Term Shift Varies

Hours Per Week
 Education Required: Greater Than or Equal High School Diploma
 Experience Required: 0 Years 0 Months
 Public Transportation

Benefits:
 Health Insurance
 Dental Insurance
 Vacation
 Sick Leave
 Holidays
 Retirement/Pension Plan
 Clothing/Uniform Allowance
 Child Care

| <input type="checkbox"/> | Company | Order# | Date | Sta | Age | OR/MD | OR ID | #D | #R | #O | #H |
|-------------------------------------|---------------------|------------------------------|------------|------------|-----|--------------|-----------|----|----|----|----|
| <input checked="" type="checkbox"/> | CHA | Help Desk Coordinator | 03/25/2010 | Open | 96 | AJE - Online | 517430219 | 0 | 1 | 0 | |
| <input type="checkbox"/> | Empire State Coll | Technical Support Specialist | | Open | 171 | AJE - Online | 520044750 | 0 | 1 | 0 | |
| <input type="checkbox"/> | InfoEweb Inc | Database Analyst/Programmer | JE4881071 | | | AJE - Online | 524688430 | 0 | 1 | 0 | |
| <input type="checkbox"/> | The College of Sal | Help Desk Technician | JE4581071 | | | AJE - Online | 531271262 | 0 | 1 | 0 | |
| <input type="checkbox"/> | U.S. District Court | Help Desk Technician | JE4525114 | 03/16/2010 | | | 50666417 | 0 | 2 | 0 | |

25 Search Clear Detail Print List Comments Save Search Assign to List Post Match Refer

Highlight Job Order / Click on Refer button

NYS DEPARTMENT OF LABOR
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The screenshot displays the 'Job Order Detail' window for 'Empire State College'. The window includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, there are sub-tabs for Employer Search, Employer Detail, Job Order Search, and Job Order Detail. The main content area shows a table with columns: SSH, Name, Vet, Date, Staff, Ref Meth, Result, Pay At Hire, and Unit. A single row is visible with the following data: , Malinak Case, Yes, 05/29/2010, Brooks, John, Staff Matching, ., ., ., .

Adds Customer's as a Referral

- visible in Job Order Detail Window / Referrals Tab

At the bottom of the window, there are several buttons: Add Referral, Post Result, Delete Referral, Print List, Cust Detail, Employer Letter w/ Resume, Customer Letter w/ Job Order, Follow-Up w/ Employer, Follow-Up w/ Customer, Save, [disabled], [disabled], Correspond, Print, [disabled], Return to Search, Start Match, Comments, and Tag.

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Customer Detail Window / Activities Tab

Customer Search: Malinak, Case N. SSN: OSOS ID: NY010514946 1 of 1

| Gen. Info | Add'l Info | Objective | Work Hist. | Ed/Lic | Skills | Saved Searches | Activities | Comments | Tests |
|---|---------------|-------------------|---------------------|-------------------|-----------|----------------|------------|----------|-------|
| Activity | Activity Date | Office | Staff | Employer | Job ID | SA | | | |
| <input type="checkbox"/> Match | 06/29/2010 | NY9999 | Brooks, John | CHA | JE4588713 | | | | |
| <input checked="" type="checkbox"/> Interstate Job Referral | 06/29/2010 | NY9999 | Brooks, John | Empire State Coll | JE4227779 | | | | |
| <input type="checkbox"/> Match | 06/28/2010 | NY9999 | Brooks, John | Taconic Farms | NY0946084 | | | | |
| <input type="checkbox"/> Not Hired | 06/26/2010 | NY9999 | Administrator, Batc | Schenectady Comr | JE4037279 | | | | |
| <input type="checkbox"/> WIA Enrollment | 06/25/2010 | Cortland Works Ca | Sandwick, Robin | | | | | | Yes |
| <input type="checkbox"/> Common Measures Enrollment | 06/25/2010 | Cortland Works Ca | Sandwick, Robin | | | | | | Yes |
| <input type="checkbox"/> Labor Exchange Enrollment | 06/25/2010 | Cortland Works Ca | Sandwick, Robin | | | | | | Yes |
| <input type="checkbox"/> Assessment Interview, Initial Assessment | 06/25/2010 | Cortland Works Ca | Sandwick, Robin | | | | | | |
| <input type="checkbox"/> Interstate Job Referral | 03/15/2010 | NY9999 | DOUGLAS-DUFFY | Schenectady Comr | JE4037279 | | | | |

Adds "Referral" L1 Service (Activity) to Customer's record

- visible in Customer Detail Window / Activities Tab
- visible in Services Window / Service History Tab

Buttons: Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Return to Search, Comments, Tag, Resume, Schedule

NYS DEPARTMENT OF LABOR
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Some TA's to Keep in Mind

TA# -- Title

10-2 -- SMART 2010 - recording changes coming

10-5 -- New Trade Act Reporting Requirements

10-3 -- Add'l Participant Demographics (Int / Tng)

10-4 -- Elevate America

08-4.1 -- Initial Assessment - updates coming

04-6.4 -- TAA (Revised) summarizes various TAs
and pull OSOS specifics include as attachments

Some TA's to Keep in Mind

TA# -- Title

09-15 -- WIA Youth Waivers (ARRA)

09-13 -- Lower Living Standard Income Level

06-16.2 -- Revised Level 1 / 2 Svc List /
Definitions currently undergoing review

09-2 -- ITA Approval Policy

09-4 -- Poverty Guidelines for 2009

08-8 -- Data Element Validation

*Question(s)
and
Answer(s)*



Thank-you!

