

# DVOP

# My Case Load Tab

# OSOS Guide

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## **PURPOSE**

USDOL Employment and Training Administration and Veteran's Employment and Training Service released guidelines on the refocused roles and responsibilities for NYSDOLs Disabled Veterans' Outreach Program Specialists (DVOPs) and Local Veterans' Employment Representatives (LVERs).

Career center professional staff must be proficient in accurately recording veteran status and eligibility into OSOS. Information is obtained during the initial assessment to determine a service plan and specify the next steps for the veteran. Accurate recording is crucial for federal reporting and for providing sequential and continuous service to the veteran.

DVOPs will limit their activities to providing one-on-one services to the eligible veterans and spouses who are included in at least one of the additional eligibility requirements:

- 18 to 24 years old
- A special disabled or disabled veteran
- Homeless
- A recently-separated service member, who at any point in the previous 12 months has been unemployed for 27 or more weeks
- An offender, who is currently incarcerated or has been released from incarceration
- Without a high school diploma or equivalent certificate
- Considered "Low-income"

DVOPS may also provide service to members of the armed forces who are wounded, ill, or injured and receiving treatment in military treatment facilities (MTFs) or warrior transition units (WTUs) and to the spouses or other family caregivers of such wounded, ill, or injured members.

NYS MTF:

- Saratoga Navy Clinic
- West Point Keller Army Community Hospital
- Fort Drum Guthrie Ambulatory Health Care Clinic

NYS WTU:

- Fort Drum

OSOS users now have the ability to create a personal combined employer contact and job seeking customer case load. Staff will be able to perform searches against their case load, but not the case load of other staff persons.

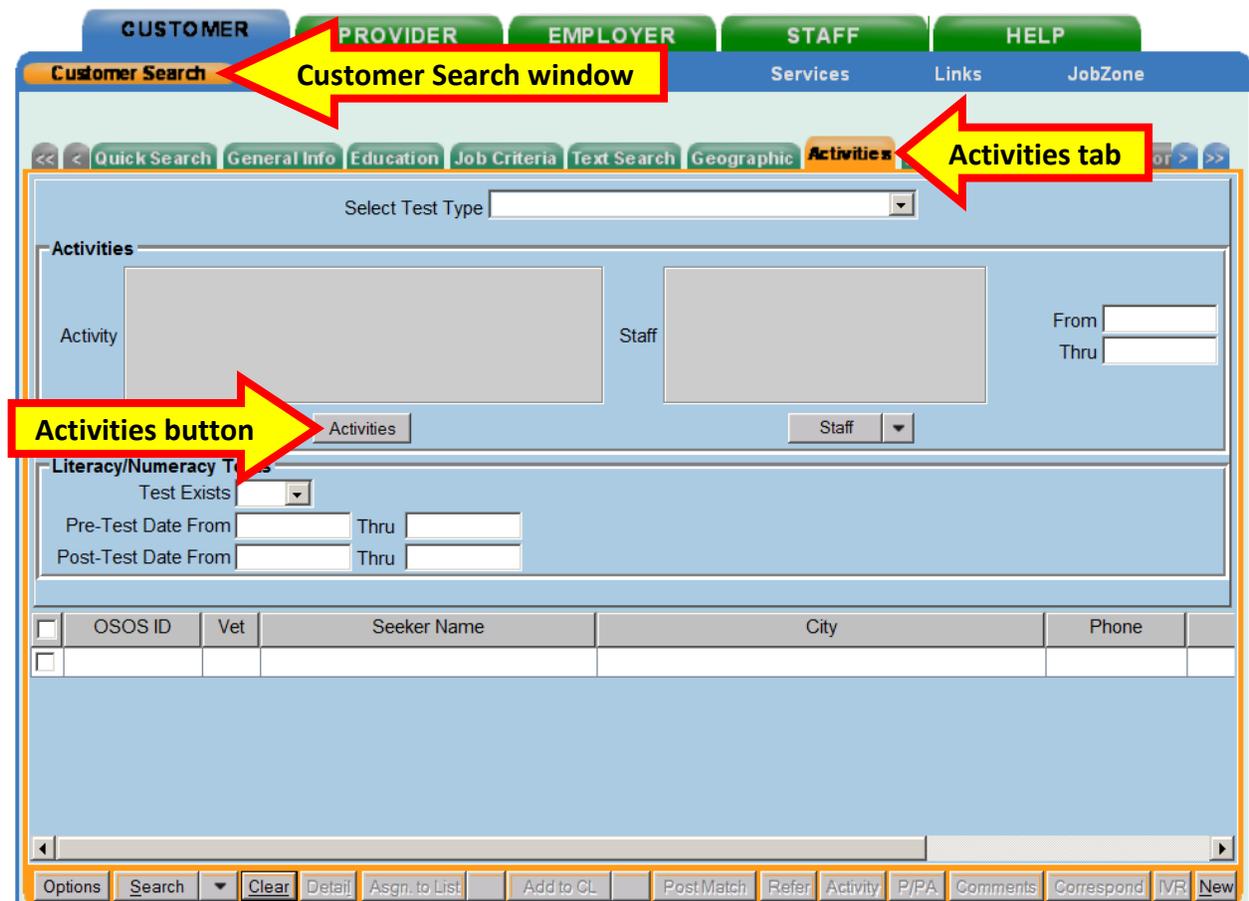
## OSOS DATA ENTRY

### CREATING AND MAINTAINING THE CASE LOAD

A DVOP may create their initial **My Case Load** from past and current DVOP eligible veterans by beginning with a customer search.

Select the **Activities** tab in the **Customer Search** window.

Click the **Activities** button.

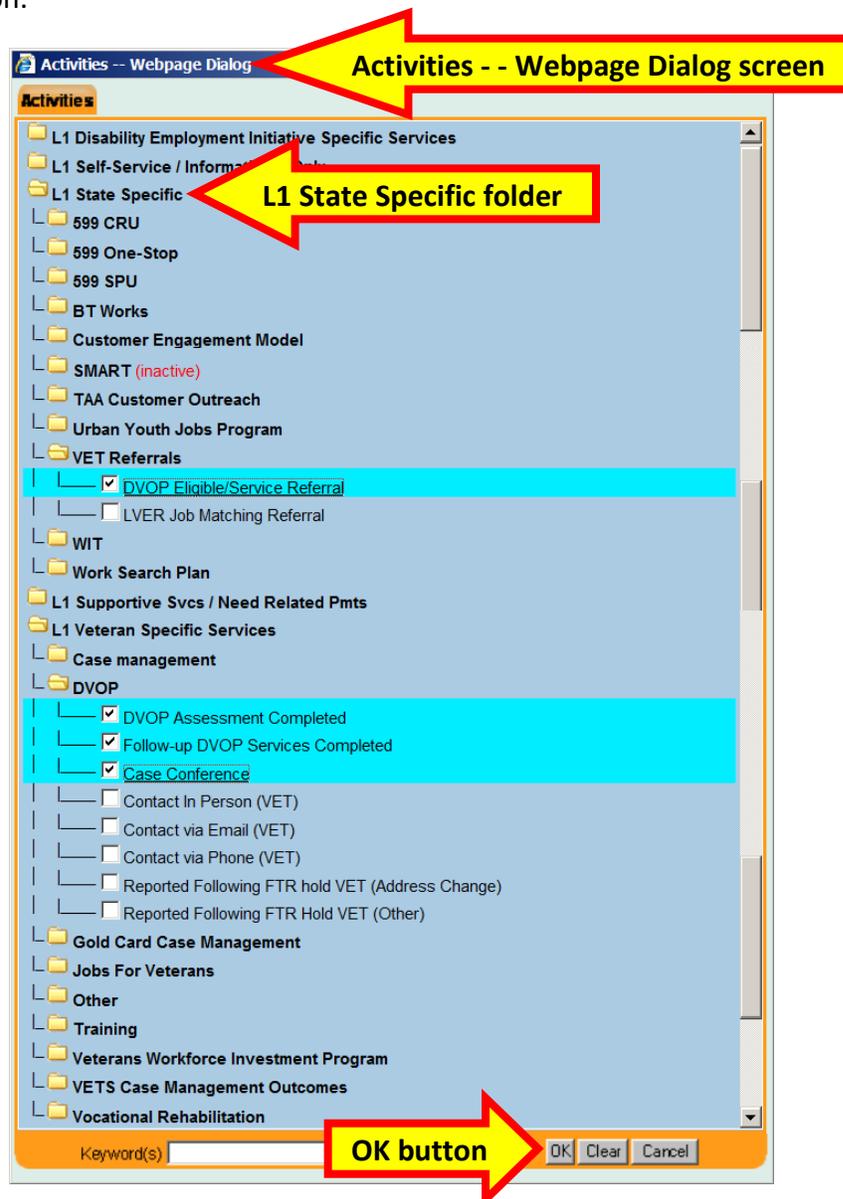


The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these is the 'Customer Search' window header with sub-tabs: Services, Links, and JobZone. The main content area has a sub-navigation bar with tabs: Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, and **Activities**. The 'Activities' tab is highlighted with a yellow arrow. Below the sub-navigation bar is a 'Select Test Type' dropdown menu. The main content area is divided into sections: 'Activities' (with 'Activity' and 'Staff' input fields), 'Literacy/Numeracy Tests' (with 'Test Exists' dropdown and date range inputs), and a table with columns: OSOS ID, Vet, Seeker Name, City, and Phone. At the bottom, there is a toolbar with buttons: Options, Search, Clear, Detail, Asgn. to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New. A yellow arrow points to the 'Activities' button in the toolbar.

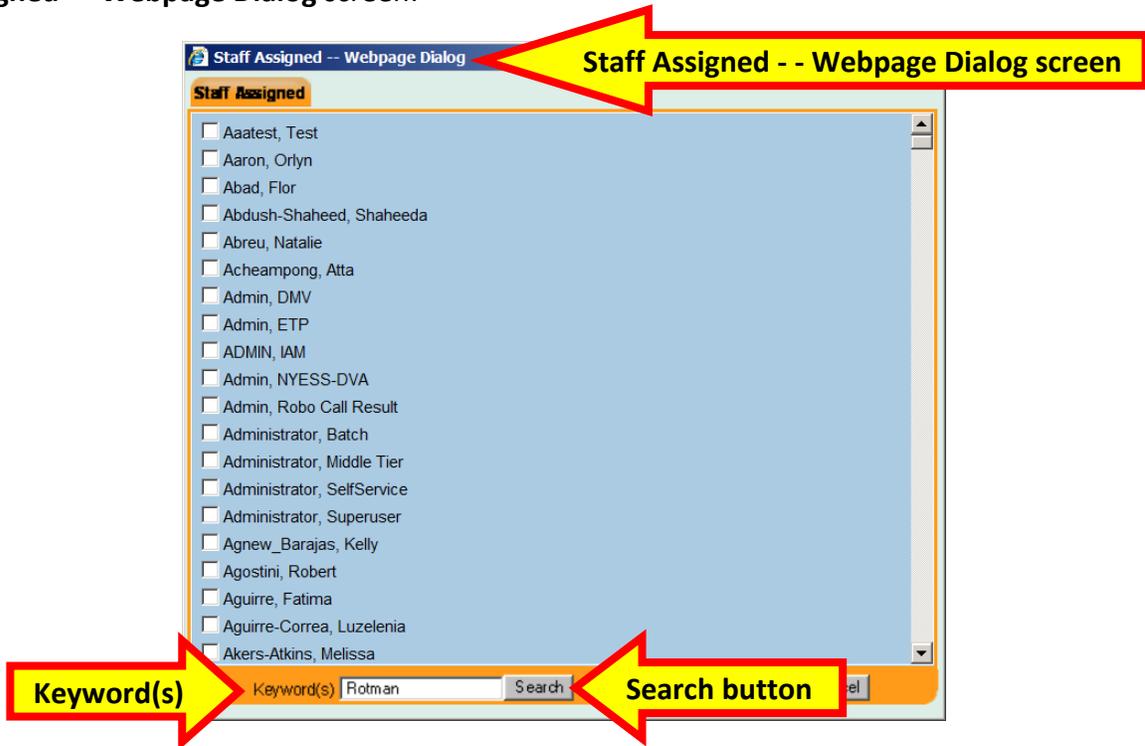
Select the following 4 activities within the **Activities - - Webpage Dialog** screen:

1. **DVOP Eligible/Service Referral** from the Vet Referrals folder within the L1 State Specific folder
2. **DVOP Assessment Completed** from the DVOP folder within the L1 Veteran Specific Services folder
3. **Follow-Up DVOP Services Completed** from the DVOP folder within the L1 Veteran Specific Services folder
4. **Case Conference** from the DVOP folder within the L1 Veteran Specific Services folder

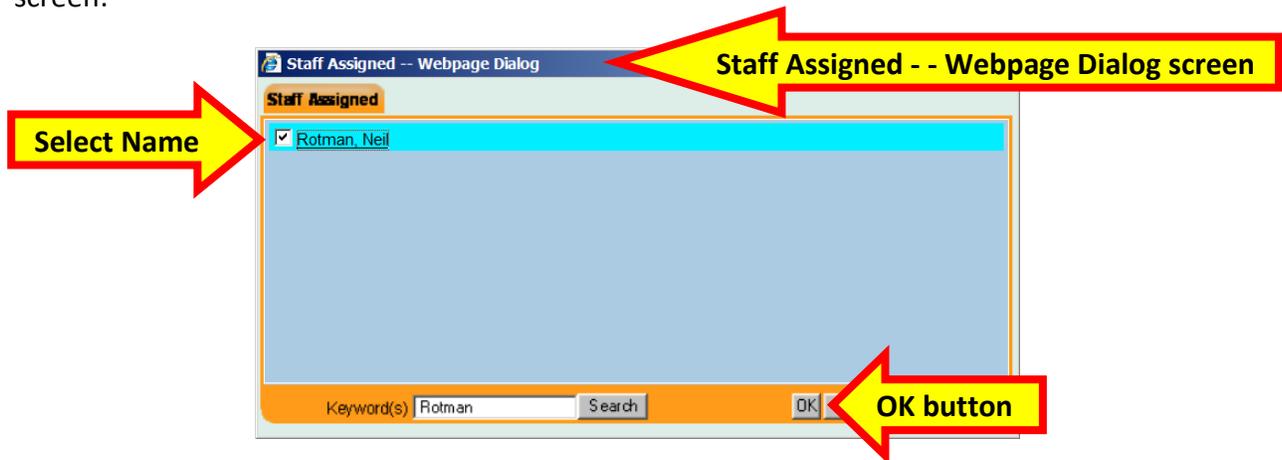
Click the **OK** button.



Enter the DVOP's last name in the **Keyword(s)** data field and click the **Search** button in the **Staff Assigned - - Webpage Dialog** screen:



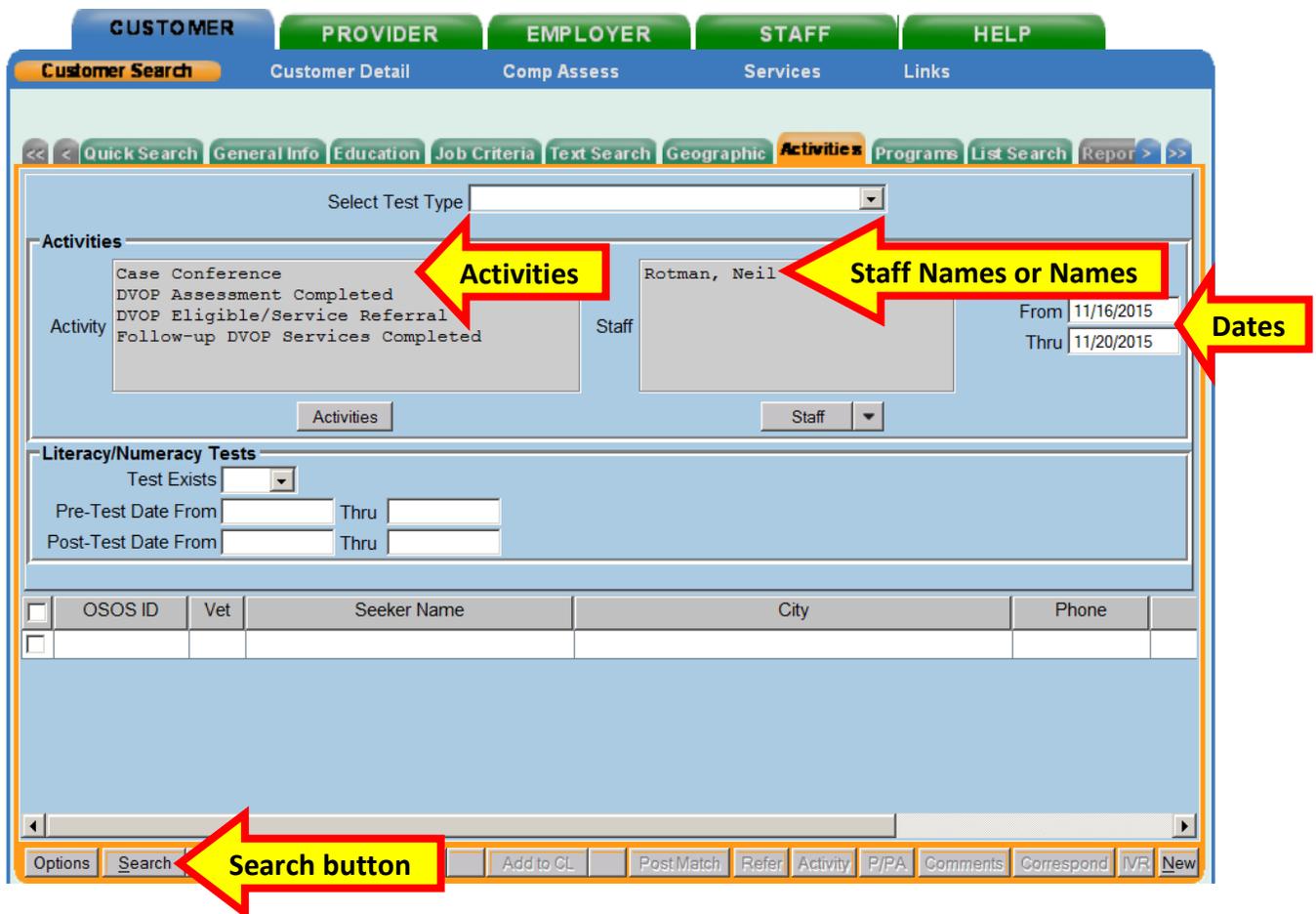
Select the appropriate name and click the **OK** button in the **Staff Assigned - - Webpage Dialog** screen:



The 4 activities and DVOP name will be visible.

DVOPS creating the initial caseload should not enter any dates before February 9, 2015. This will identify any customer that received any of the four services by the selected DVOP or other identified staff since the activities were created. If the system identifies too many results to display, then add dates to lower the results.

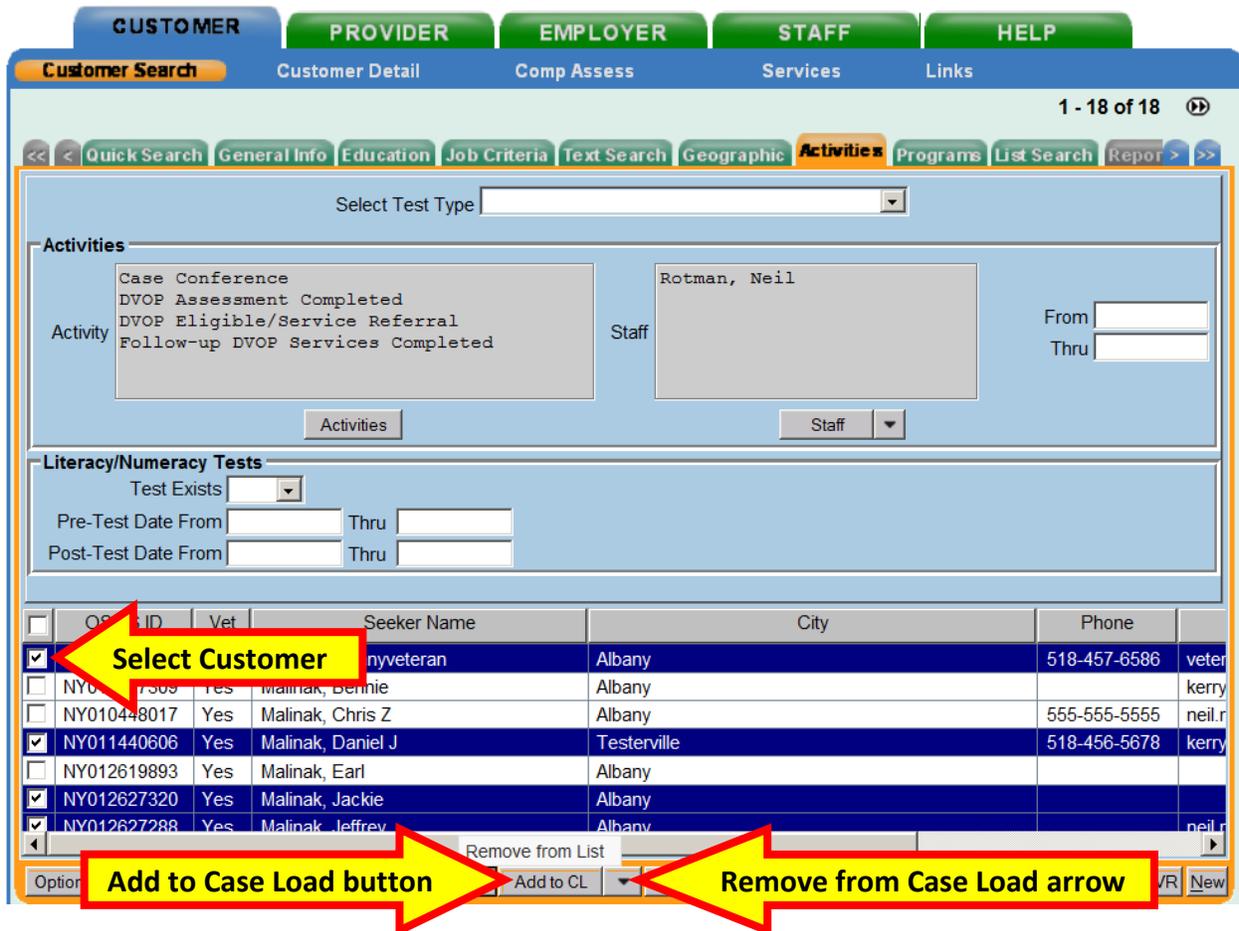
DVOPs looking to maintain their existing case load and add newly identified DVOP eligible veterans may choose to do so periodically by adding recent dates. Adding recent dates will help minimize search results that may include veterans currently assigned to the case load.



The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, and Links. The main search area includes a 'Select Test Type' dropdown and a list of activities: Case Conference, DVOP Assessment Completed, DVOP Eligible/Service Referral, and Follow-up DVOP Services Completed. A 'Staff' field contains the name 'Rotman, Neil'. A 'Dates' section has 'From' and 'Thru' date pickers set to 11/16/2015 and 11/20/2015 respectively. Below the search form is a 'Literacy/Numeracy Tests' section with 'Test Exists' dropdown and date pickers for 'Pre-Test Date' and 'Post-Test Date'. At the bottom, there is a table with columns for OSOS ID, Vet, Seeker Name, City, and Phone. A 'Search button' is highlighted at the bottom left of the interface.

Select the veteran or veterans to be added to the case load. The **Add to Case Load** button will be accessible and available within all tabs of the **Customer Search** window.

Clicking the arrow next to the **Add to CL** button will access the **Remove from Case Load** button.

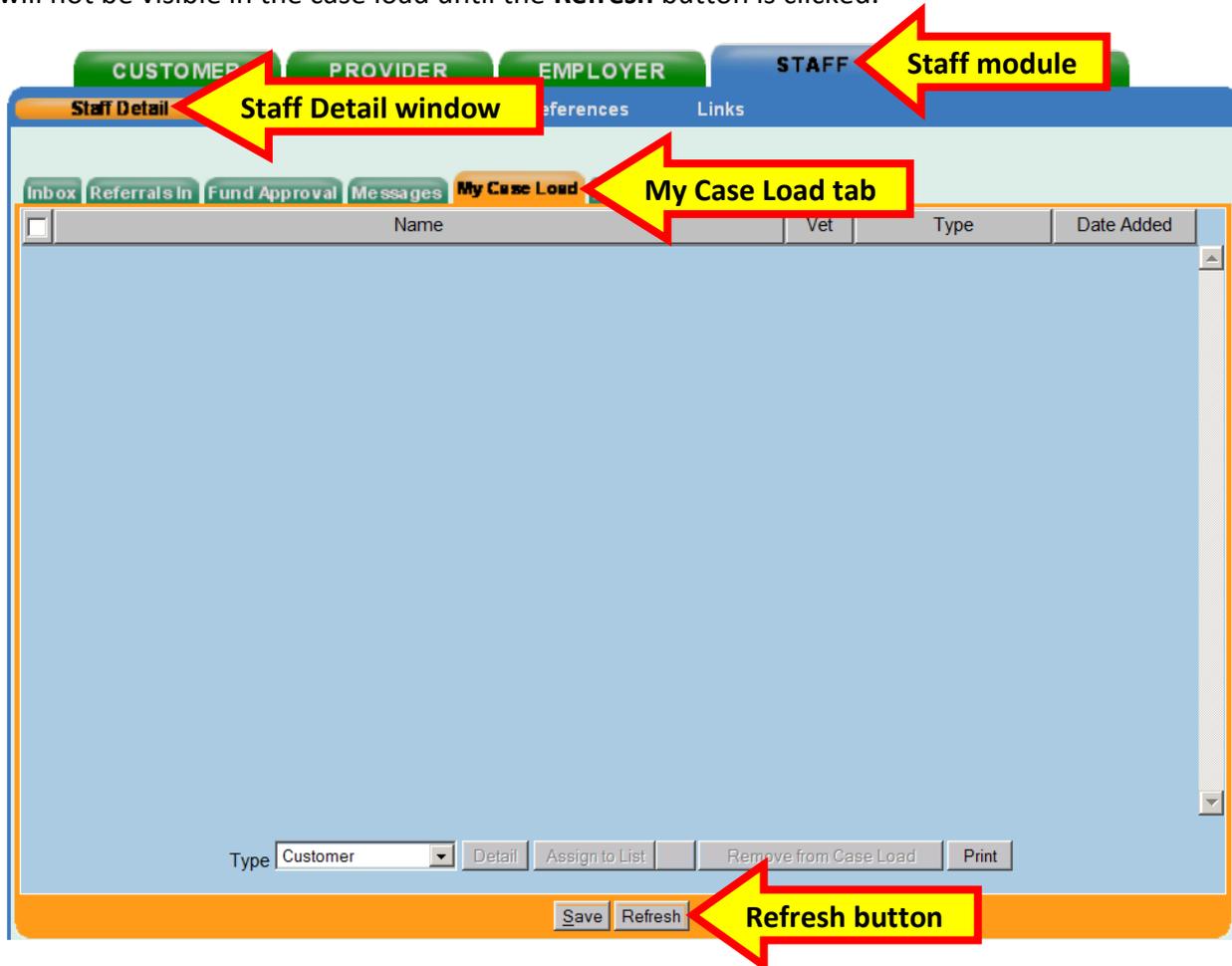


The screenshot shows the OSOS Customer Search interface. At the top are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search (selected), Customer Detail, Comp Assess, Services, and Links. A search bar shows '1 - 18 of 18'. Navigation buttons include Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, Activities (selected), Programs, List Search, and Report. The main area has a 'Select Test Type' dropdown and two sections: 'Activities' (listing Case Conference, DVOP Assessment Completed, DVOP Eligible/Service Referral, Follow-up DVOP Services Completed) and 'Staff' (listing Rotman, Neil). Below these are 'Literacy/Numeracy Tests' filters. At the bottom is a table with columns: OSOS ID, Vet, Seeker Name, City, Phone, and a status column. The first row is selected. At the bottom right are buttons: 'Option', 'Add to Case Load button', 'Add to CL', and 'Remove from Case Load arrow'.

OSOS ID	Vet	Seeker Name	City	Phone	
<input checked="" type="checkbox"/>		nyveteran	Albany	518-457-6586	veter
<input type="checkbox"/>	NY011440606	Malinak, Bennie	Albany		kerry
<input type="checkbox"/>	NY010448017	Malinak, Chris Z	Albany	555-555-5555	neil.r
<input checked="" type="checkbox"/>	NY011440606	Malinak, Daniel J	Testerville	518-456-5678	kerry
<input type="checkbox"/>	NY012619893	Malinak, Earl	Albany		
<input checked="" type="checkbox"/>	NY012627320	Malinak, Jackie	Albany		
<input checked="" type="checkbox"/>	NY012627288	Malinak, Jeffrey	Albany		neil.r

Selecting veterans that are already in the case load and clicking the **Add to Case Load** button will not create a duplicate listing.

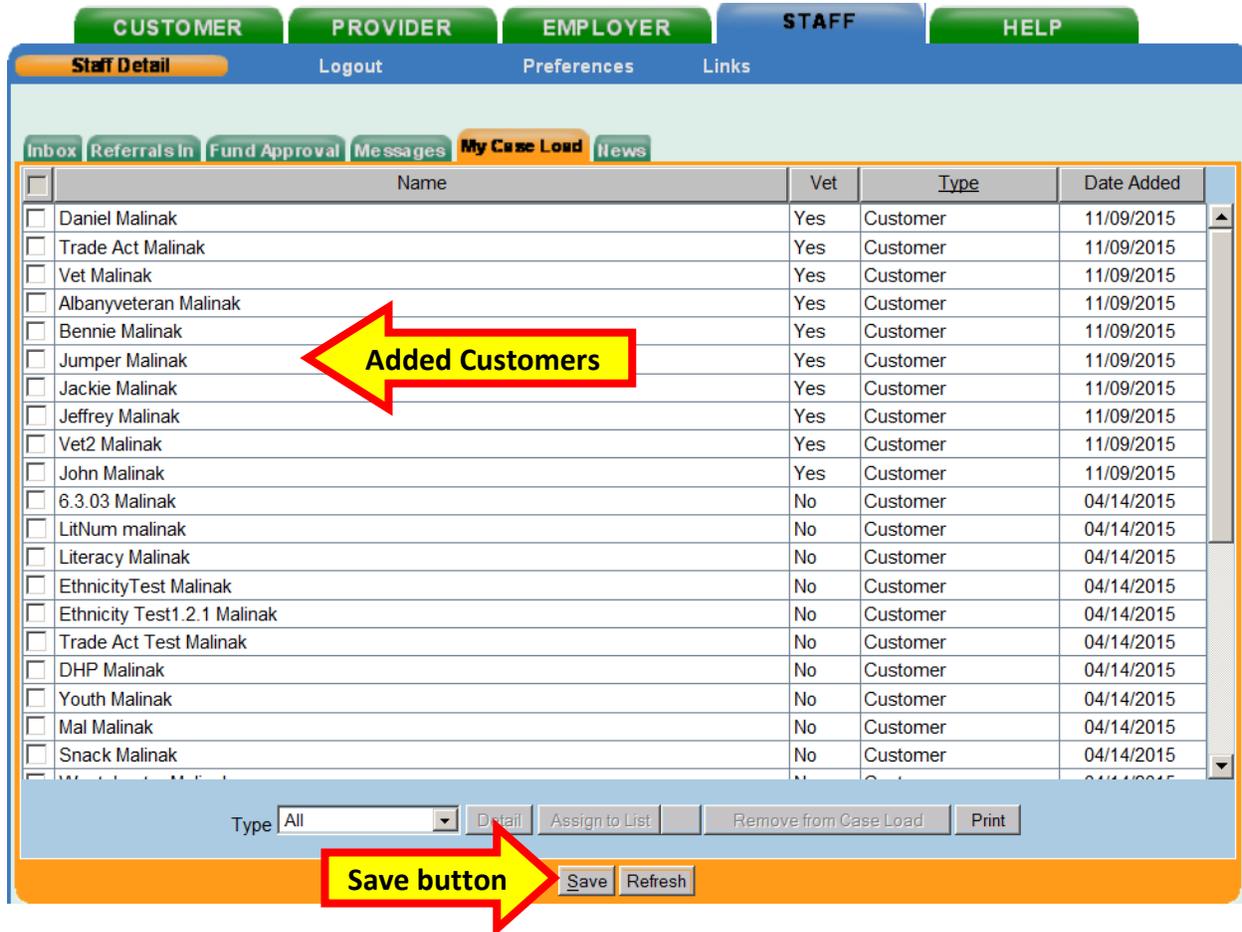
Click the **My Case Load** tab in the **Staff Detail** window of the **Staff** module. The added names will not be visible in the case load until the **Refresh** button is clicked.



Once the **Refresh** button is clicked, the added names are visible. It is necessary to click the **Refresh** button to confirm when customers and employer contacts are removed.

Remember to **Save My Case Load** when finished.

Users may select multiple customers or employer contacts, but may not combine individuals from the two types concurrently when adding, removing or selecting the **Detail** button.



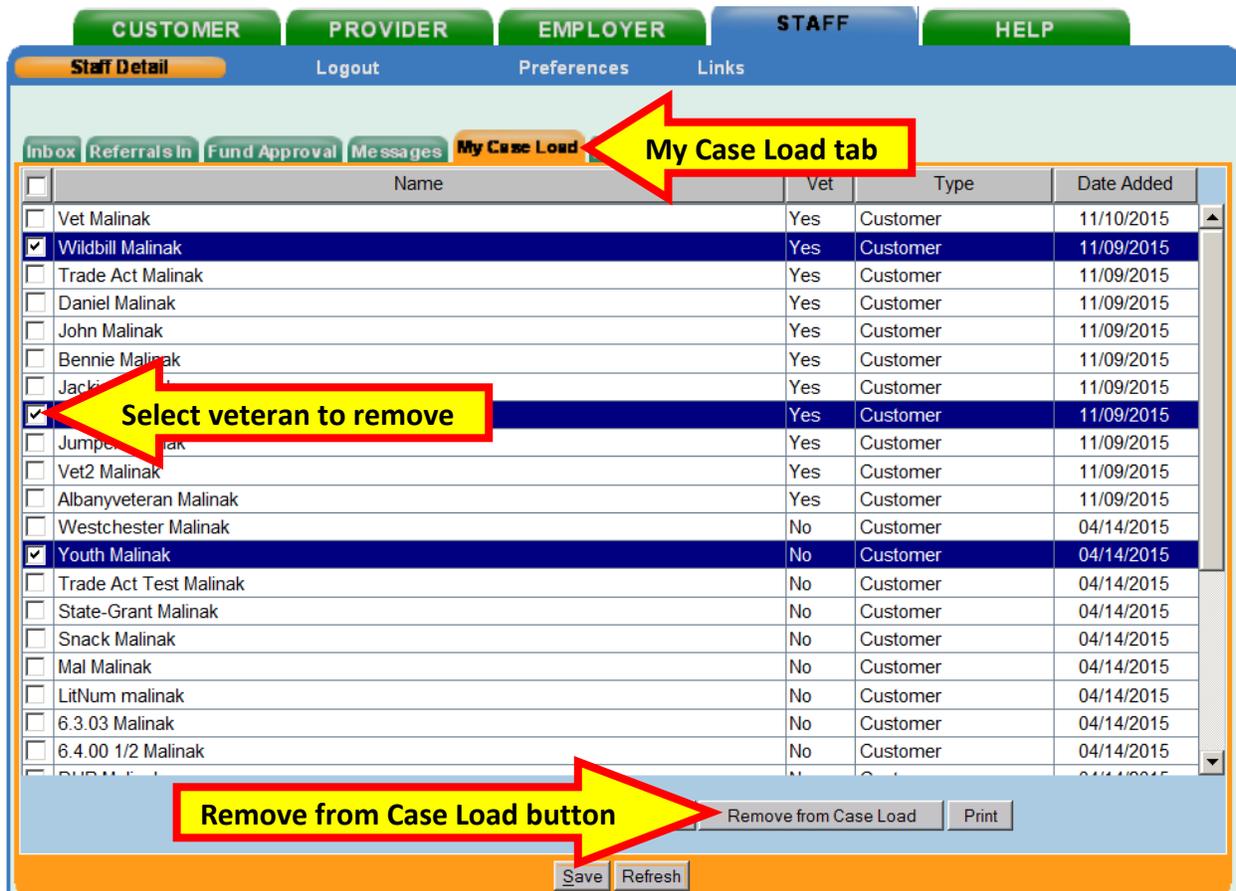
The screenshot shows the 'Staff Detail' interface with the 'My Case Load' tab selected. A table lists various customer entries with columns for Name, Vet, Type, and Date Added. A yellow arrow points to the table with the text 'Added Customers'. Below the table, there are buttons for 'Detail', 'Assign to List', 'Remove from Case Load', and 'Print'. At the bottom, there are 'Save' and 'Refresh' buttons, with a yellow arrow pointing to the 'Save' button and the text 'Save button'.

<input type="checkbox"/>	Name	Vet	Type	Date Added
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Literacy Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	EthnicityTest Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	DHP Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Snack Malinak	No	Customer	04/14/2015

## ADDING AND REMOVING VETERANS FROM AN EXISTING CASE LOAD

DVOPs may remove customers or employers from the case load from the **My Case Load** tab, as well as other screens within OSOS.

Simply select the veteran(s) to be removed and click the **Remove from Case Load** button.



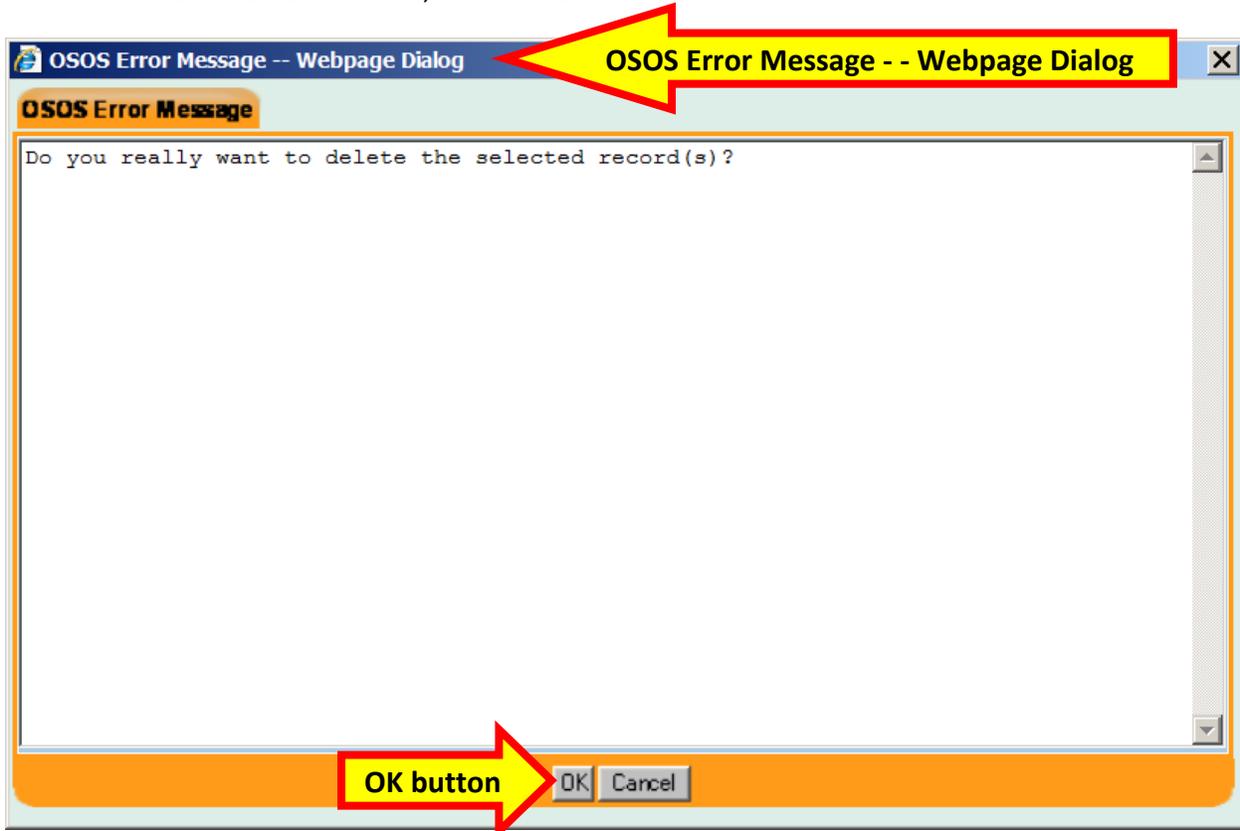
The screenshot shows the OSOS interface with the 'My Case Load' tab selected. A table lists various veterans with columns for Name, Vet status, Type, and Date Added. The 'Remove from Case Load' button is visible at the bottom of the table.

	Name	Vet	Type	Date Added
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/10/2015
<input checked="" type="checkbox"/>	Wildbill Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jacki	Yes	Customer	11/09/2015
<input checked="" type="checkbox"/>	Jumper	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Westchester Malinak	No	Customer	04/14/2015
<input checked="" type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	State-Grant Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Snack Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/>	6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	6.4.00 1/2 Malinak	No	Customer	04/14/2015

Buttons: Save, Refresh, Remove from Case Load, Print

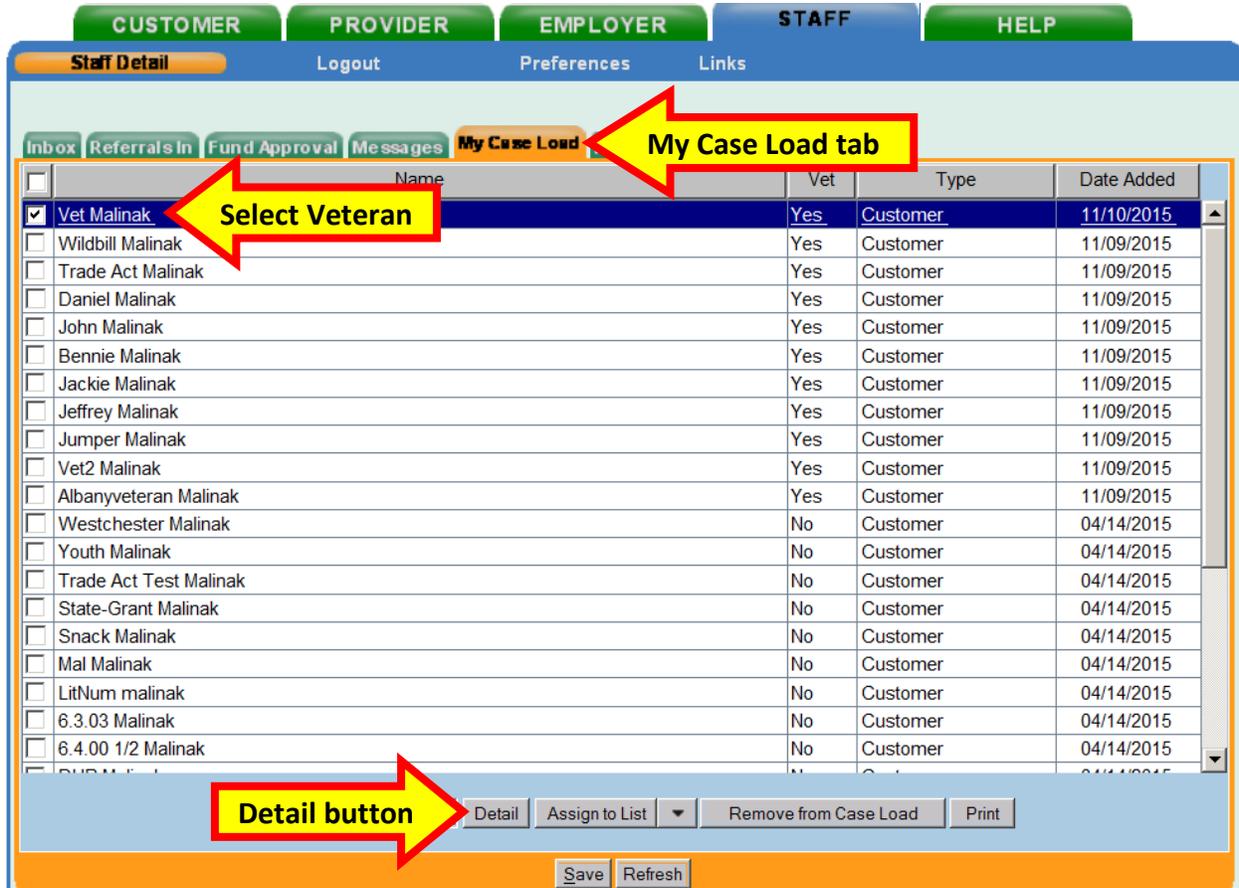
The **OSOS Error Message - - Webpage Dialog** popup will appear requesting confirmation to remove the customer from the case load.

If the customer is to be removed, click the **OK** button.



Remember to **Save** My Case Load when finished.

Select any customer or employer contact and click the **Detail** button to navigate to the veteran's or employer's **General Info** tab.



The screenshot displays the 'My Case Load' tab in the OSOS system. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are links for Staff Detail, Logout, Preferences, and Links. The main content area shows a table with the following columns: Name, Vet, Type, and Date Added. The first row is selected, showing 'Vet Malinak' with 'Yes' for Vet, 'Customer' for Type, and '11/10/2015' for Date Added. Below the table are buttons for 'Detail', 'Assign to List', 'Remove from Case Load', and 'Print'. At the very bottom are 'Save' and 'Refresh' buttons.

Name	Vet	Type	Date Added
<input checked="" type="checkbox"/> Vet Malinak	Yes	Customer	11/10/2015
<input type="checkbox"/> Wildbill Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Westchester Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/> State-Grant Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Snack Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/> LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.4.00 1/2 Malinak	No	Customer	04/14/2015



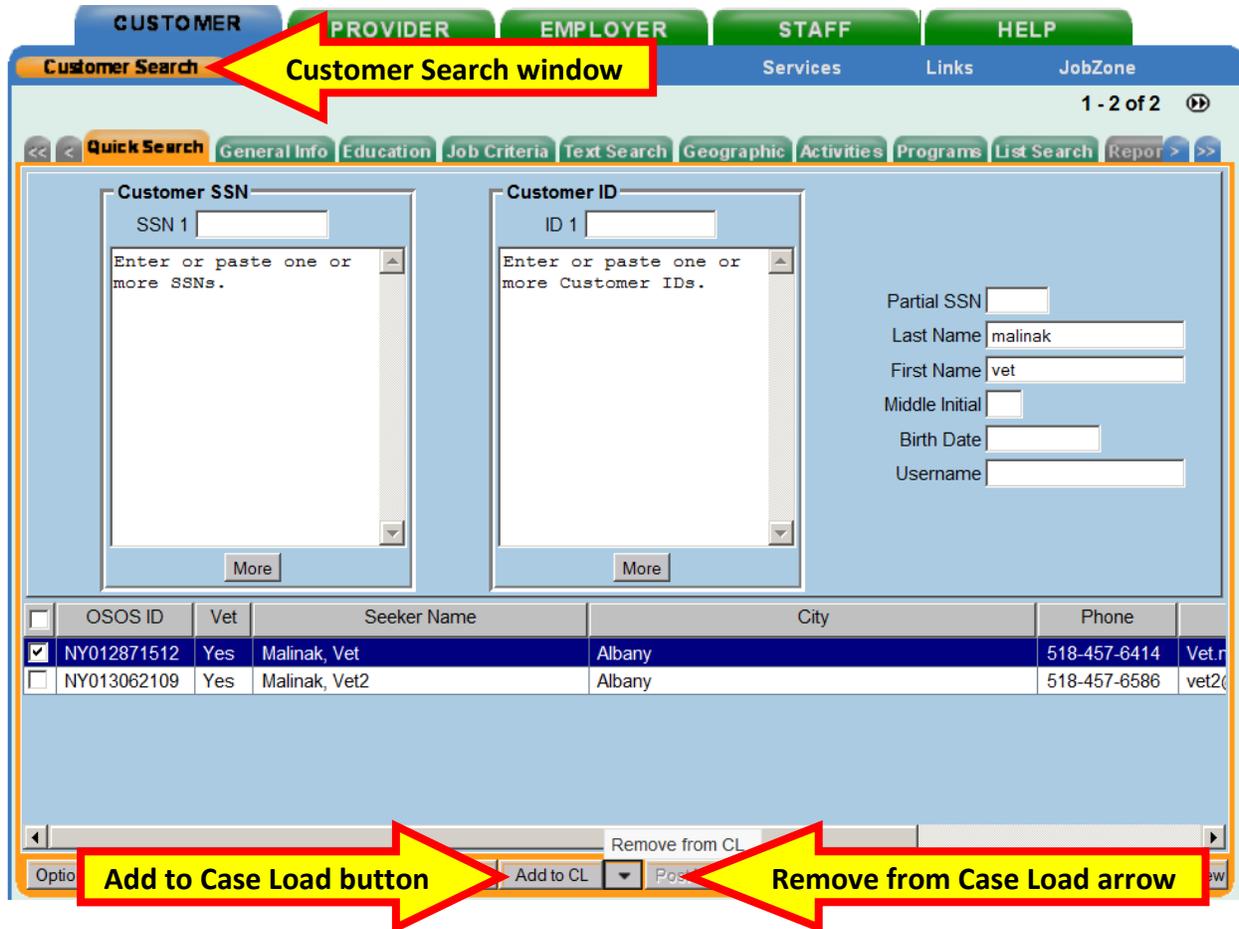
*A user may only see their own My Case Load and not the case loads of another user.*

*A customer and employer contact may be included in more than one staff person's case load.*

## OPPORTUNITIES TO ADD OR REMOVE VETERANS FROM THE CASE LOAD

When a DVOP is searching or in an individual customer record, there are numerous opportunities where that veteran may be added to a caseload.

Veterans and employer contacts may be added from any **Search** tab. The gray row of buttons at the bottom of every **Customer Search** window remains the same for each tab:



The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The main window title is 'Customer Search' with sub-tabs for Services, Links, and JobZone. Below this is a 'Quick Search' section with various search criteria tabs. The main search area contains two large text input fields for 'Customer SSN' and 'Customer ID', each with a 'More' button below it. To the right of these fields are several smaller input fields for 'Partial SSN', 'Last Name' (malinak), 'First Name' (vet), 'Middle Initial', 'Birth Date', and 'Username'. Below the search fields is a table with the following data:

<input type="checkbox"/>	OSOS ID	Vet	Seeker Name	City	Phone	
<input checked="" type="checkbox"/>	NY012871512	Yes	Malinak, Vet	Albany	518-457-6414	Vet.r
<input type="checkbox"/>	NY013062109	Yes	Malinak, Vet2	Albany	518-457-6586	vet2(

At the bottom of the window, there is a row of buttons: 'Add to Case Load button', 'Add to CL', and 'Remove from Case Load arrow'. A 'Remove from CL' button is also visible above the 'Add to CL' button.



The **General Info** tab within the **Customer Detail** window has a button towards the middle of the screen to add to the case load if not already added.

There is no need to save the record.

*There is no opportunity to add or remove customers from any Comprehensive Assessment or Services tabs.*

The screenshot shows the OSOS Customer Detail window for a customer named Malinak, Vet. The window has several tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The 'Customer Detail' tab is selected. The 'Gen. Info' tab is also visible. The 'Add to Case Load' button is highlighted with a yellow arrow.

**Customer Data**

- SSN: [Redacted]
- Status: Active
- Job Seeker: Active
- Username: malink12
- Password: Vet1234
- Last Name: Malinak
- First Name: Vet
- Date of Birth: 01/12/1991
- Gender: Male
- Portfolio Lvl.: JobZone Adult
- Address: 10 Main Street
- City: Albany
- State: New York
- Zip: 12206
- County: Albany
- Country: United States
- Phone: 518-457-6414
- Email: Vet.malinak@gmail.com
- U.S. Citizen:

**Education & Employment**

- Education Level: GED
- School Status: Not attending school; H.S. Graduate
- Employment Status: Not Employed

**Contact Preferences**

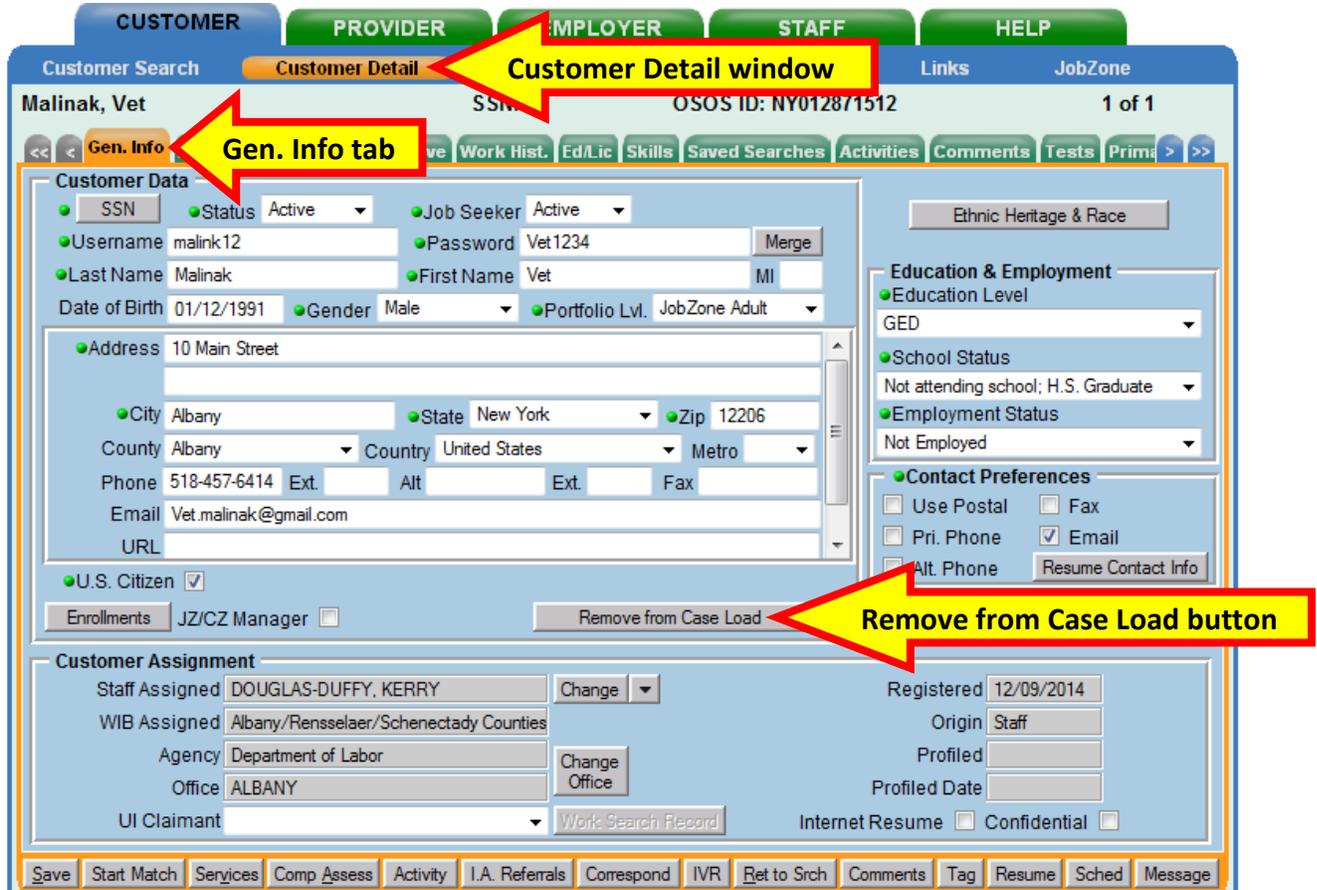
- Use Postal:
- Fax:
- Pri. Phone:
- Email:
- Alt. Phone:

**Customer Assignment**

- Staff Assigned: DOUGLAS-DUFFY, KERRY
- WIB Assigned: Albany/Rensselaer/Schenectady Counties
- Agency: Department of Labor
- Office: ALBANY
- UI Claimant: [Redacted]
- Registered: 12/09/2014
- Origin: Staff
- Profiled Date: [Redacted]
- Internet Resume:
- Confidential:

**Buttons:** Save, Start Match, Services, Comp Assess, Activity, IA Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, Message

If the customer is already included in the case load, then the button changes to **Remove From Case Load**.



**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail **Customer Detail window** Links JobZone

Malinak, Vet SSN OSOS ID: NY012871512 1 of 1

<< **Gen. Info** Gen. Info tab Work Hist. Ed/Lic Skills Saved Searches Activities Comments Tests Prima >>

**Customer Data**

- SSN
- Status: Active
- Job Seeker: Active
- Username: malink12
- Password: Vet1234
- Last Name: Malinak
- First Name: Vet
- MI: MI
- Date of Birth: 01/12/1991
- Gender: Male
- Portfolio Lvl.: JobZone Adult
- Address: 10 Main Street
- City: Albany
- State: New York
- Zip: 12206
- County: Albany
- Country: United States
- Metro: Metro
- Phone: 518-457-6414
- Email: Vet.malinak@gmail.com
- U.S. Citizen:

**Education & Employment**

- Education Level: GED
- School Status: Not attending school; H.S. Graduate
- Employment Status: Not Employed

**Contact Preferences**

- Use Postal
- Fax
- Pri. Phone
- Email
- Alt. Phone

**Remove from Case Load button**

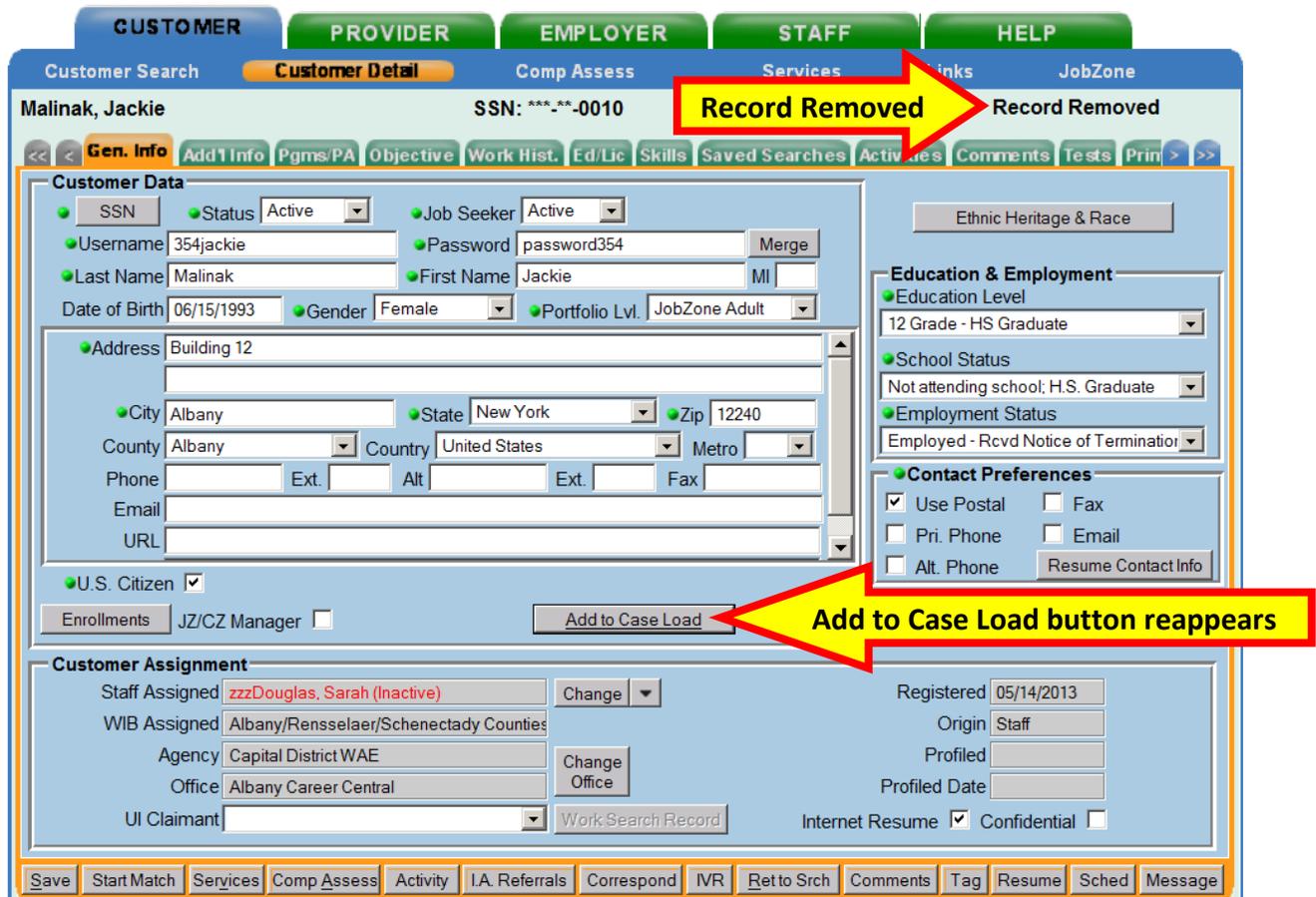
**Customer Assignment**

- Staff Assigned: DOUGLAS-DUFFY, KERRY
- WIB Assigned: Albany/Rensselaer/Schenectady Counties
- Agency: Department of Labor
- Office: ALBANY
- UI Claimant
- Registered: 12/09/2014
- Origin: Staff
- Profiled
- Profiled Date
- Internet Resume:  Confidential:

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

Once the customer has been removed from the case load, the message **Record Removed** will appear in the top right hand corner and the **Remove from Case Load** button will be replaced with the **Add to Case Load** button.

There is no need to click the **Save** button.

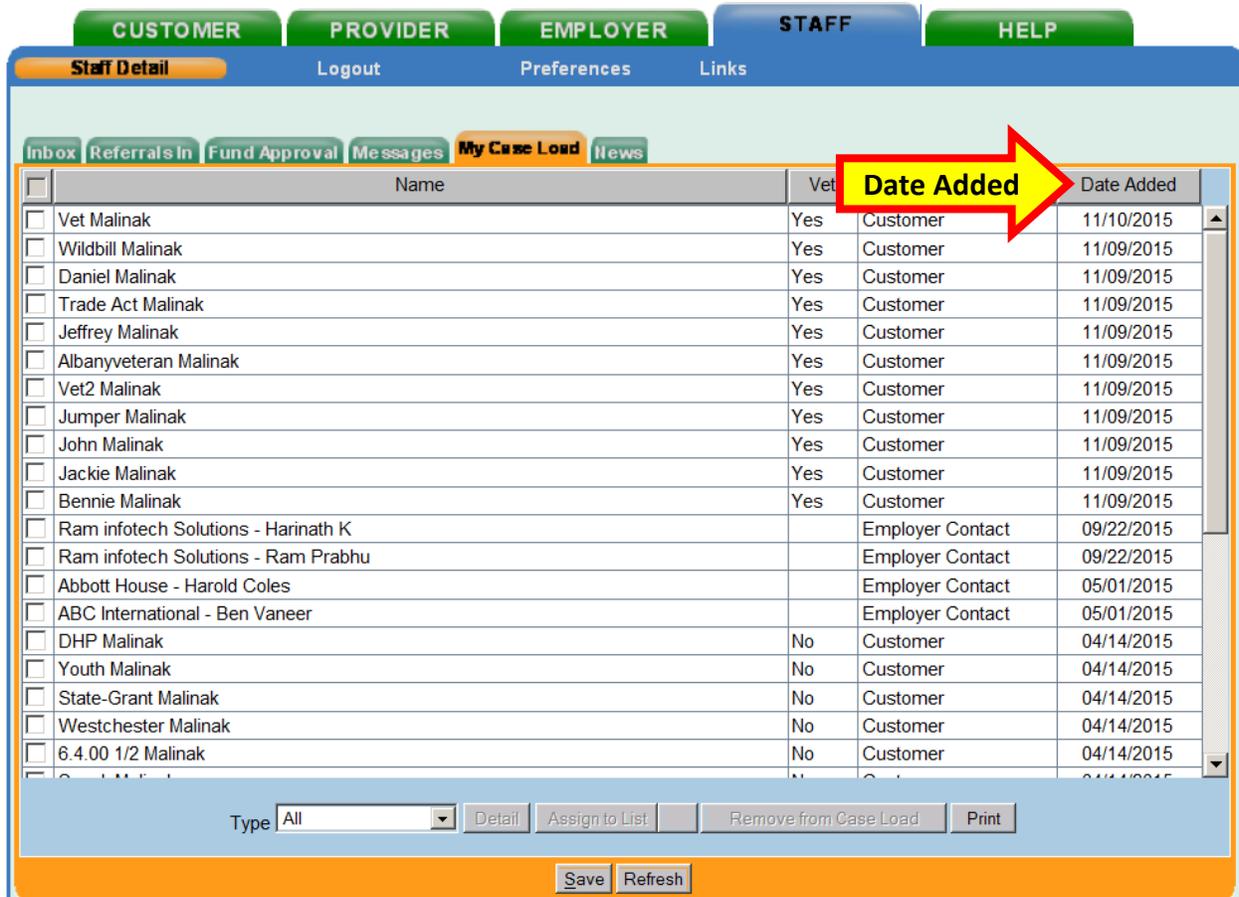


The screenshot displays the OSOS interface for a customer named Jackie Malinak. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The main content area shows the customer's details, including SSN, status, and contact information. A red arrow points to the 'Record Removed' message in the top right corner. Another red arrow points to the 'Add to Case Load' button, which has reappeared after the record was removed. The bottom of the page features a row of buttons for various actions like Save, Start Match, and Services.

The same availability to add and remove employer contacts exists within the **Employer** module. However, there are no opportunities to add providers or contacts in the **Provider** module.

## SORTING MY CASE LOAD

Sorting in the **My Case Load** tab defaults to the **Date Added** column.

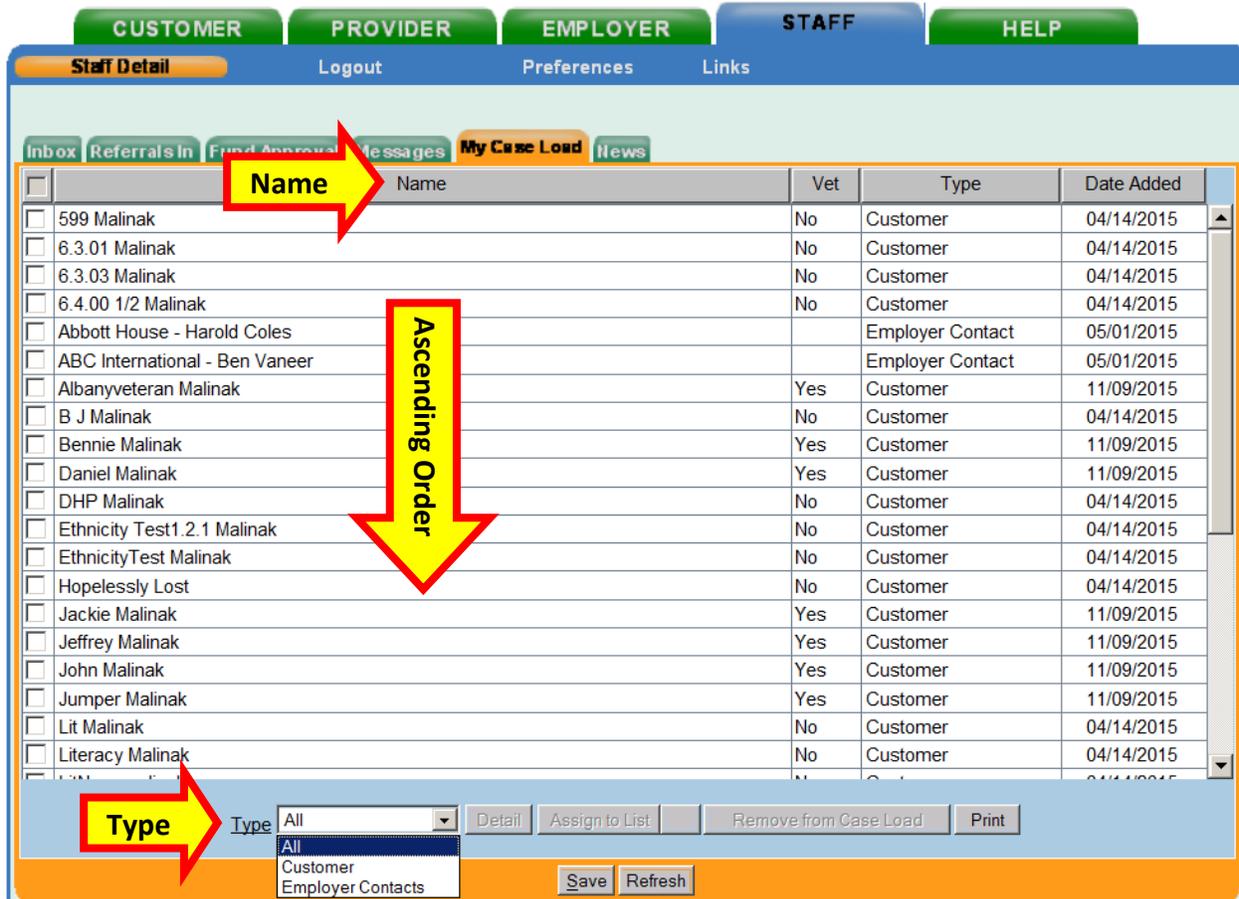


The screenshot shows the 'My Case Load' tab in the OSOS interface. The table below lists various cases, sorted by 'Date Added' in descending order. A red arrow points to the 'Date Added' column header.

<input type="checkbox"/>	Name	Vet	Date Added
<input type="checkbox"/>	Vet Malinak	Yes	11/10/2015
<input type="checkbox"/>	Wildbill Malinak	Yes	11/09/2015
<input type="checkbox"/>	Daniel Malinak	Yes	11/09/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	11/09/2015
<input type="checkbox"/>	Albanyveteran Malinak	Yes	11/09/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	11/09/2015
<input type="checkbox"/>	Jumper Malinak	Yes	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	11/09/2015
<input type="checkbox"/>	Jackie Malinak	Yes	11/09/2015
<input type="checkbox"/>	Bennie Malinak	Yes	11/09/2015
<input type="checkbox"/>	Ram infotech Solutions - Harinath K		09/22/2015
<input type="checkbox"/>	Ram infotech Solutions - Ram Prabhu		09/22/2015
<input type="checkbox"/>	Abbott House - Harold Coles		05/01/2015
<input type="checkbox"/>	ABC International - Ben Vaneer		05/01/2015
<input type="checkbox"/>	DHP Malinak	No	04/14/2015
<input type="checkbox"/>	Youth Malinak	No	04/14/2015
<input type="checkbox"/>	State-Grant Malinak	No	04/14/2015
<input type="checkbox"/>	Westchester Malinak	No	04/14/2015
<input type="checkbox"/>	6.4.00 1/2 Malinak	No	04/14/2015

At the bottom of the table, there is a 'Type' dropdown menu set to 'All', and buttons for 'Detail', 'Assign to List', 'Remove from Case Load', and 'Print'. Below the table area are 'Save' and 'Refresh' buttons.

You can sort the information by clicking any column header. In the example below, the **Name** column header was clicked and the information was sorted by the first name in ascending order. Because **All** was selected as the **Type**, the example displays both customers and employer contacts.

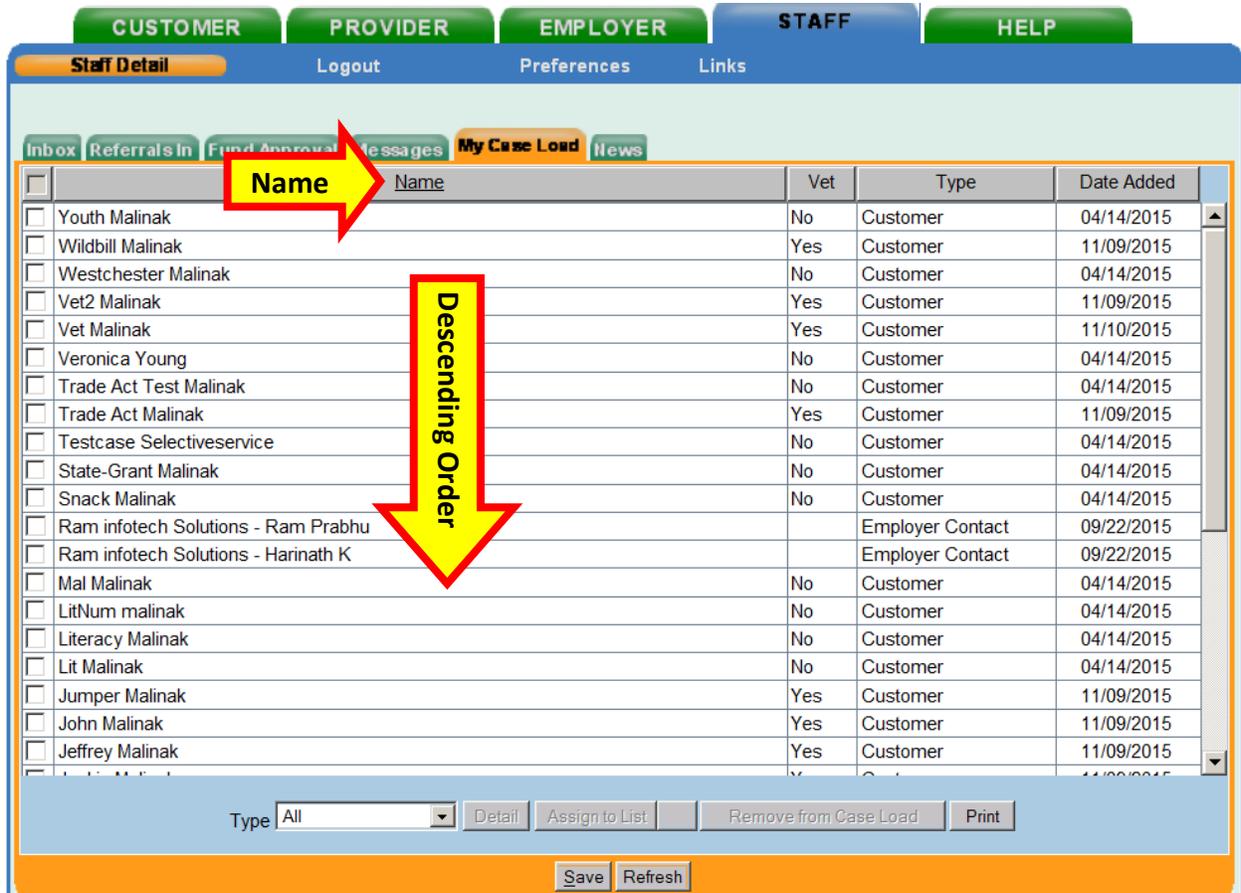


The screenshot shows the OSOS interface with the following elements:

- Navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, **STAFF**, HELP
- Sub-navigation: Staff Detail, Logout, Preferences, Links
- Functional tabs: Inbox, Referrals In, Fund Approval, Messages, **My Case Load**, News
- Table with columns: Name, Vet, Type, Date Added
- Table content (sorted by Name):
 

Name	Vet	Type	Date Added
599 Malinak	No	Customer	04/14/2015
6.3.01 Malinak	No	Customer	04/14/2015
6.3.03 Malinak	No	Customer	04/14/2015
6.4.00 1/2 Malinak	No	Customer	04/14/2015
Abbott House - Harold Coles		Employer Contact	05/01/2015
ABC International - Ben Vaneer		Employer Contact	05/01/2015
Albanyveteran Malinak	Yes	Customer	11/09/2015
B J Malinak	No	Customer	04/14/2015
Bennie Malinak	Yes	Customer	11/09/2015
Daniel Malinak	Yes	Customer	11/09/2015
DHP Malinak	No	Customer	04/14/2015
Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
EthnicityTest Malinak	No	Customer	04/14/2015
Hopelessly Lost	No	Customer	04/14/2015
Jackie Malinak	Yes	Customer	11/09/2015
Jeffrey Malinak	Yes	Customer	11/09/2015
John Malinak	Yes	Customer	11/09/2015
Jumper Malinak	Yes	Customer	11/09/2015
Lit Malinak	No	Customer	04/14/2015
Literacy Malinak	No	Customer	04/14/2015
- Bottom controls: Type dropdown (All selected), Detail, Assign to List, Remove from Case Load, Print, Save, Refresh

Clicking the **Name** column header a second time will reverse the sorting so that it appears in descending order.



The screenshot shows the 'My Case Load' tab in the OSOS interface. The table displays a list of staff members with columns for Name, Vet, Type, and Date Added. The 'Name' column header is highlighted, and a red arrow points to it. A large red arrow labeled 'Descending Order' points downwards, indicating the current sort order. The table data is as follows:

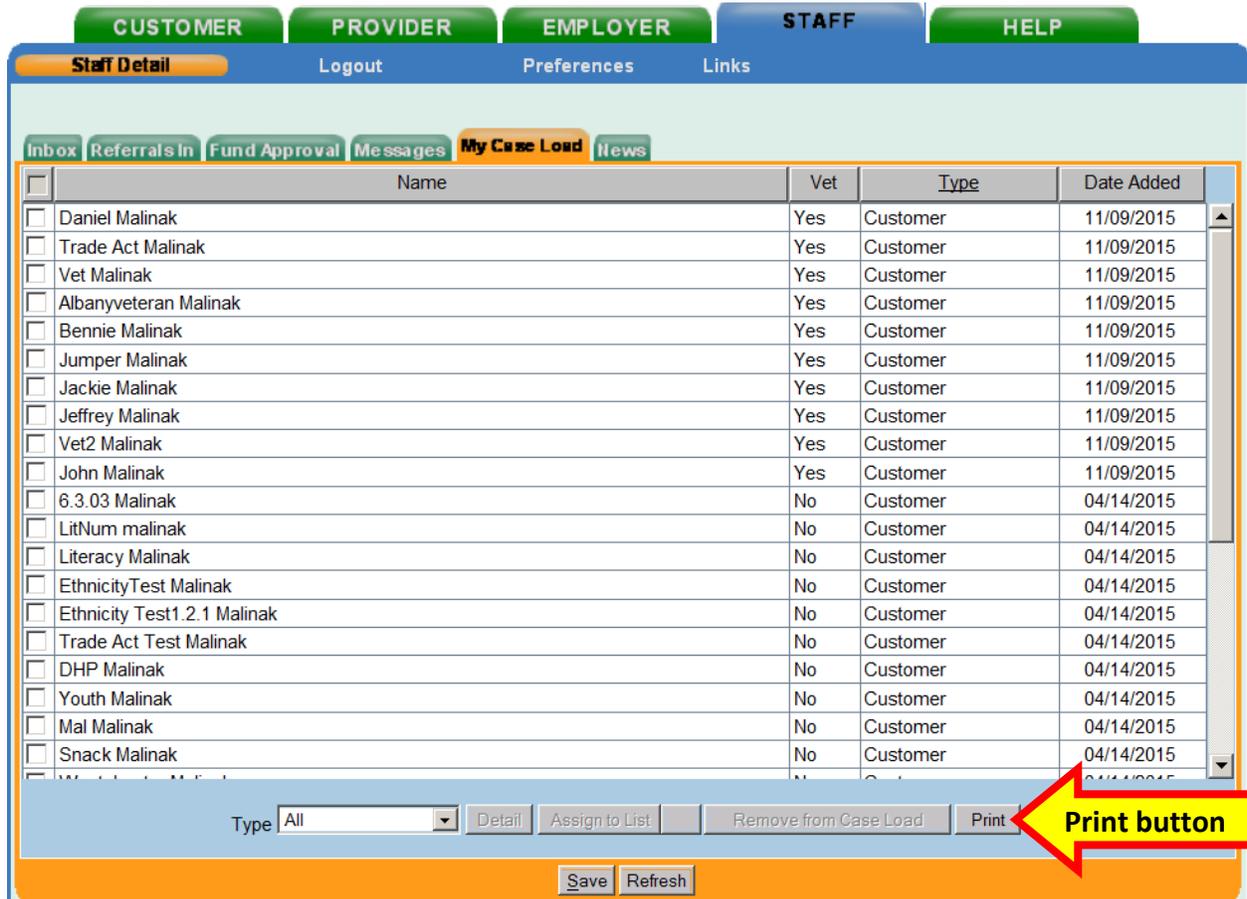
<input type="checkbox"/>	Name	Vet	Type	Date Added
<input type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Wildbill Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Westchester Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/10/2015
<input type="checkbox"/>	Veronica Young	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Testcase Selectiveservice	No	Customer	04/14/2015
<input type="checkbox"/>	State-Grant Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Snack Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Ram infotech Solutions - Ram Prabhu		Employer Contact	09/22/2015
<input type="checkbox"/>	Ram infotech Solutions - Harinath K		Employer Contact	09/22/2015
<input type="checkbox"/>	Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Literacy Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Lit Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015

At the bottom of the interface, there is a 'Type' dropdown menu set to 'All', and buttons for 'Detail', 'Assign to List', 'Remove from Case Load', 'Print', 'Save', and 'Refresh'.

## PRINTING AND EXPORTING MY CASE LOAD LIST

From the **My Case Load** tab, click the **Print** button to either print or export the case load.

Only the four visible columns from **My Case Load** will print or export to the Excel spreadsheet.



The screenshot shows the OSOS interface with the 'My Case Load' tab selected. The interface includes navigation tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Staff Detail, Logout, Preferences, and Links. The main content area has tabs for Inbox, Referrals In, Fund Approval, Messages, My Case Load, and News. The 'My Case Load' tab displays a table with the following columns: Name, Vet, Type, and Date Added. A red arrow points to the 'Print' button at the bottom right of the table.

<input type="checkbox"/>	Name	Vet	Type	Date Added
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Literacy Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	EthnicityTest Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	DHP Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Snack Malinak	No	Customer	04/14/2015

At the bottom of the table, there is a 'Type' dropdown menu set to 'All', and buttons for 'Detail', 'Assign to List', 'Remove from Case Load', and 'Print'. A red arrow points to the 'Print' button with the text 'Print button'.

To print, click the **Print** button.

To export, click the **Export** button.

**Print Case Loads -- Webpage Dialog**

**Customer Case Load for "Rotman, Neil"**  
**11/10/2015**

Name	Vet	Type	Date Added
Vet Malinak	Yes	Customer	11/10/2015
Wildbill Malinak	Yes	Customer	11/09/2015
Trade Act Malinak	Yes	Customer	11/09/2015
Daniel Malinak	Yes	Customer	11/09/2015
John Malinak	Yes	Customer	11/09/2015
Bennie Malinak	Yes	Customer	11/09/2015
Jackie Malinak	Yes	Customer	11/09/2015
Jeffrey Malinak	Yes	Customer	11/09/2015
Jumper Malinak	Yes	Customer	11/09/2015
Vet2 Malinak	Yes	Customer	11/09/2015
Albanyveteran Malinak	Yes	Customer	11/09/2015
Westchester Malinak	No	Customer	04/14/2015
Youth Malinak	No	Customer	04/14/2015
Trade Act Test Malinak	No	Customer	04/14/2015
State-Grant Malinak	No	Customer	04/14/2015
Snack Malinak	No	Customer	04/14/2015
Mal Malinak	No	Customer	04/14/2015
LitNum malinak	No	Customer	04/14/2015
6.3.03 Malinak	No	Customer	04/14/2015
6.4.00 1/2 Malinak	No	Customer	04/14/2015
DHP Malinak	No	Customer	04/14/2015
Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
EthnicityTest Malinak	No	Customer	04/14/2015
Literacy Malinak	No	Customer	04/14/2015
599 Malinak	No	Customer	04/14/2015
B J Malinak	No	Customer	04/14/2015
Hopelessly Lost	No	Customer	04/14/2015
Testcase Selectiveservice	No	Customer	04/14/2015
Veronica Young	No	Customer	04/14/2015
Lit Malinak	No	Customer	04/14/2015
6.3.01 Malinak	No	Customer	04/14/2015





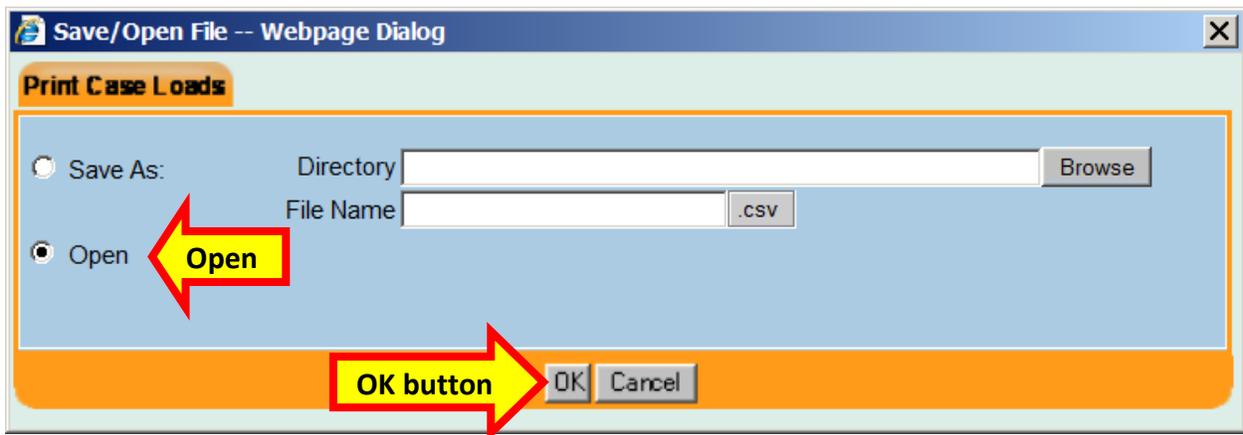


When printing, the **Print** pop-up will appear. Select the desired options and click the **Print** button. The list will open in an Excel spreadsheet, which may be saved to the desktop or any folder.

The **Export** button will navigate the user to the **Save/Open File -- Webpage Dialog** screen. When exporting, you have two options:

1. Save As
2. Open

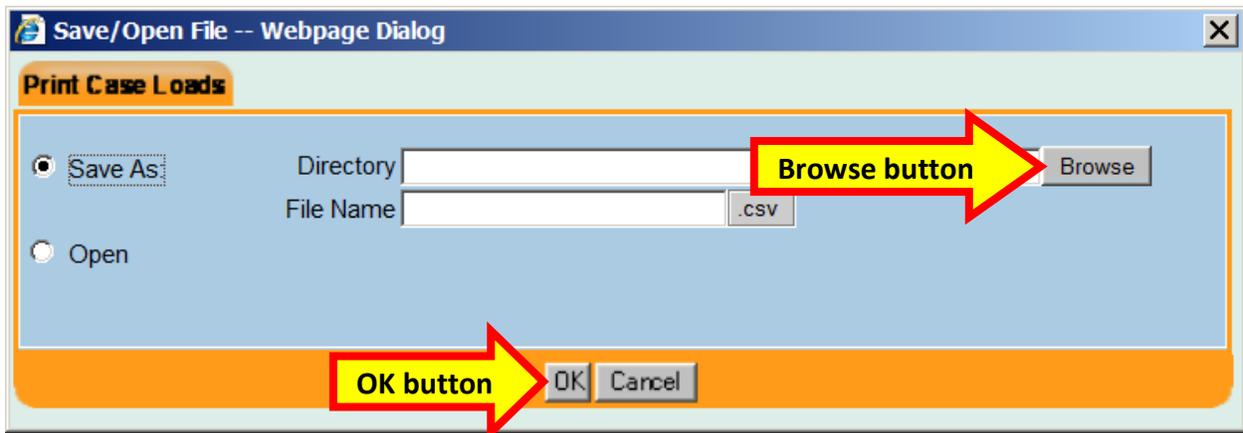
Selecting **Open** and clicking the **OK** button will immediately open the case load in an Excel spreadsheet. Once the Excel spreadsheet is open, it may be saved to the desktop or any preferred folder.



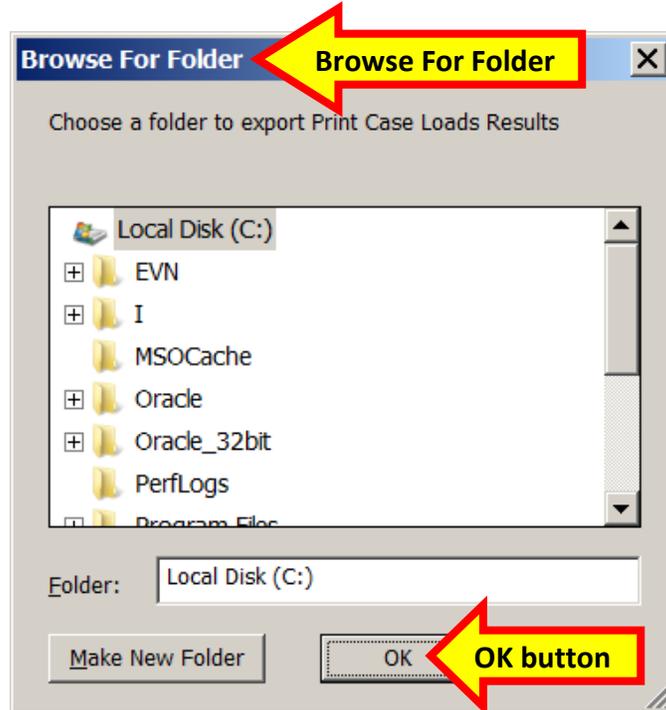
Selecting **Save As** requires the entry of a **Directory** and **File Name**.

If the **Directory** is known, it may be keyed in to data field.

If the **Directory** is not known, then select **Browse** button:

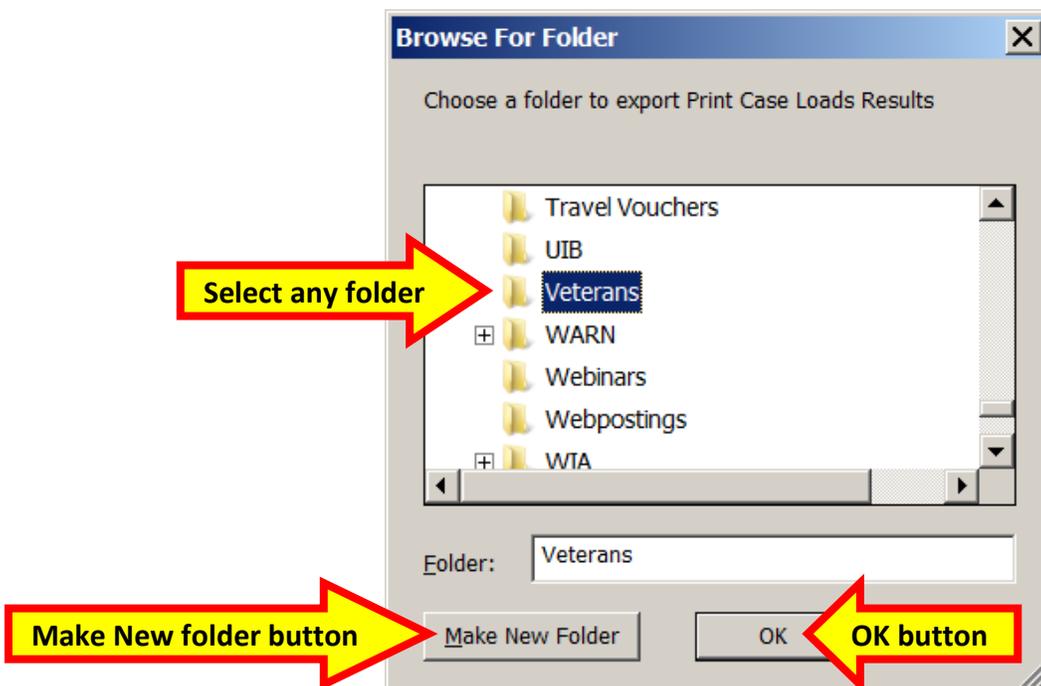


The **Browse For Folder** pop-up will appear

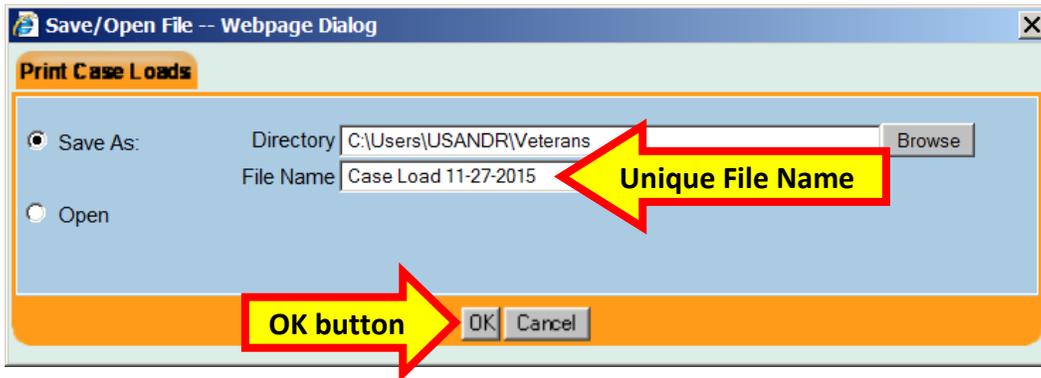


Scroll through the folders and select the preferred folder or create a new folder.

Click the **OK** button.

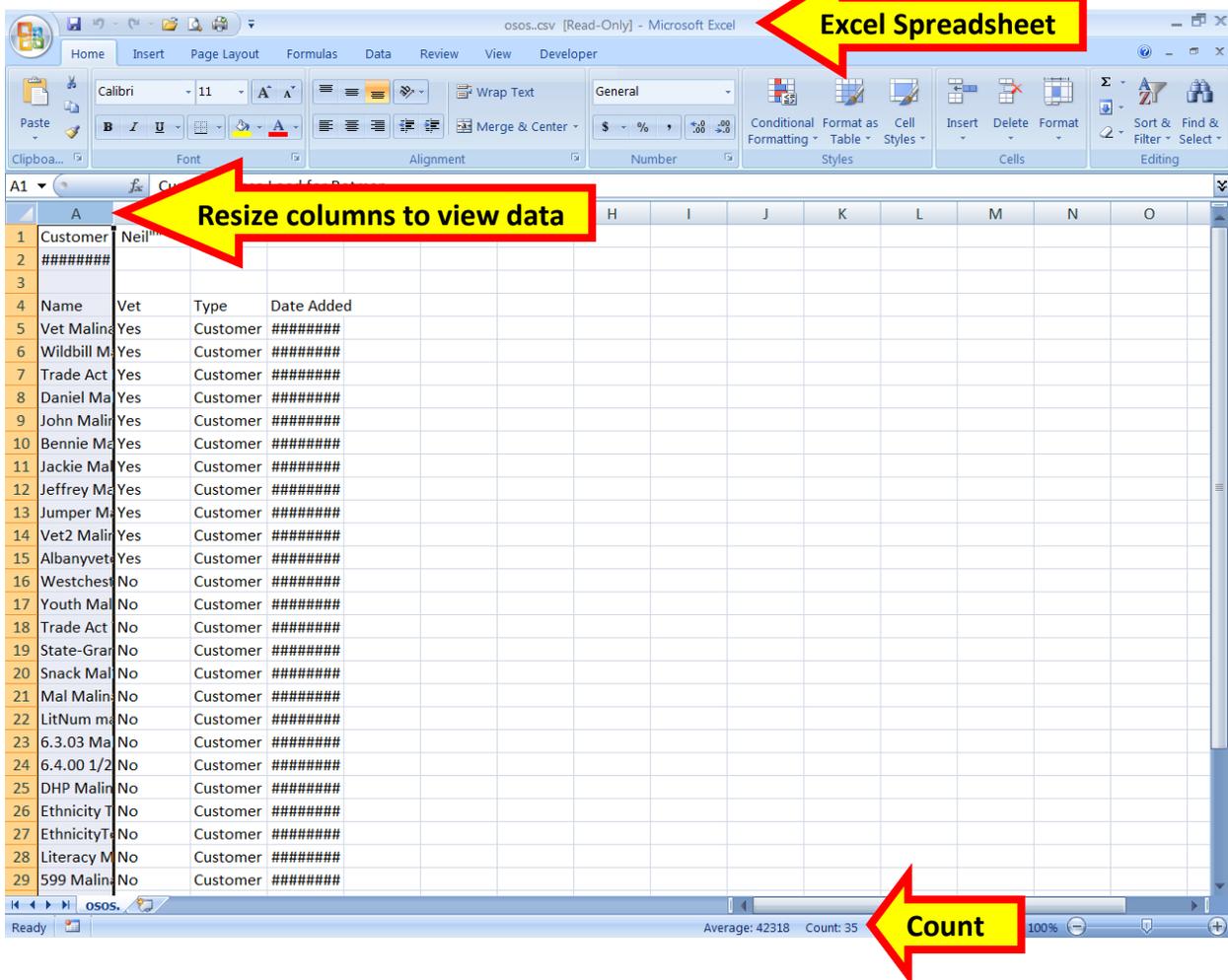


Enter a unique name for the file and click the **OK** button:



*The file will not automatically open as when the **Open** option is selected. It is necessary to open Excel and select the spreadsheet from the folder.*

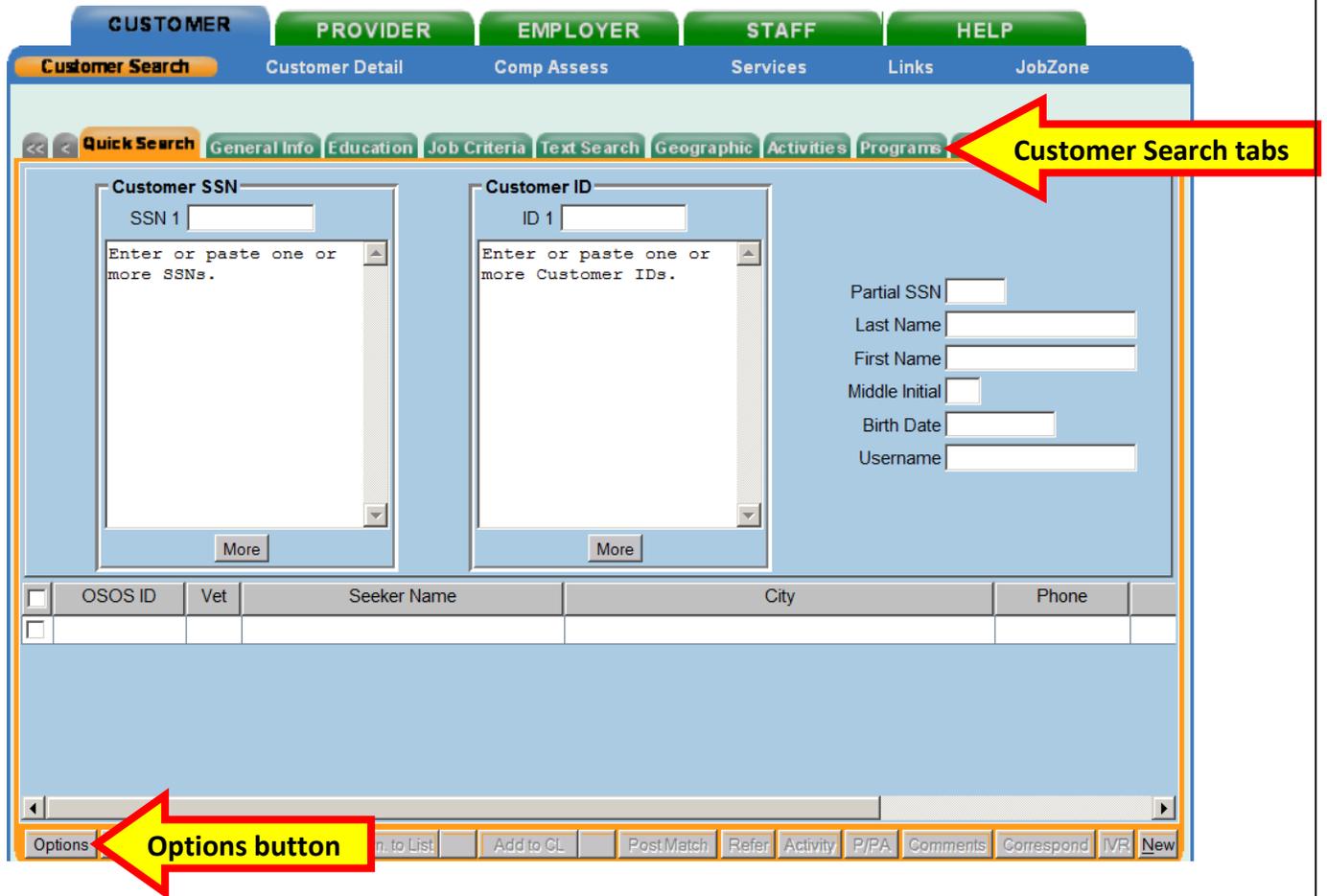
The columns will need to be resized to view the data. The **Count** at the bottom of the spreadsheet provides the number of individuals in the case load.



## CUSTOMIZING THE EXPORTED MY CASE LOAD EXCEL FILE

If more information is desired, such as the city where the customer resides, telephone number or email address, then run a search and include **My Case Load** in the **Customer Search** criteria.

To begin searching for specific customers, first click the **Options** button at the bottom of any **Customer Search** tab to access the **Customer Search Result Columns - - Webpage Dialog** screen.



The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The Customer Search sub-tab is active, showing further sub-tabs: Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, Activities, and Programs. A red arrow points to the Programs tab with the label "Customer Search tabs".

The main search area contains two large text input fields: "Customer SSN" (with a sub-field "SSN 1") and "Customer ID" (with a sub-field "ID 1"). Both fields have a "More" button below them. To the right of these fields are several smaller input fields: Partial SSN, Last Name, First Name, Middle Initial, Birth Date, and Username.

Below the search fields is a table with the following columns: OSOS ID, Vet, Seeker Name, City, and Phone. The table is currently empty.

At the bottom of the interface is a row of buttons: Options, Add to List, Add to CL, Post/Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New. A red arrow points to the Options button with the label "Options button".



Select the information for the spreadsheet by checking the box next to the desired data.

Select a number to designate the order in which the information should appear.

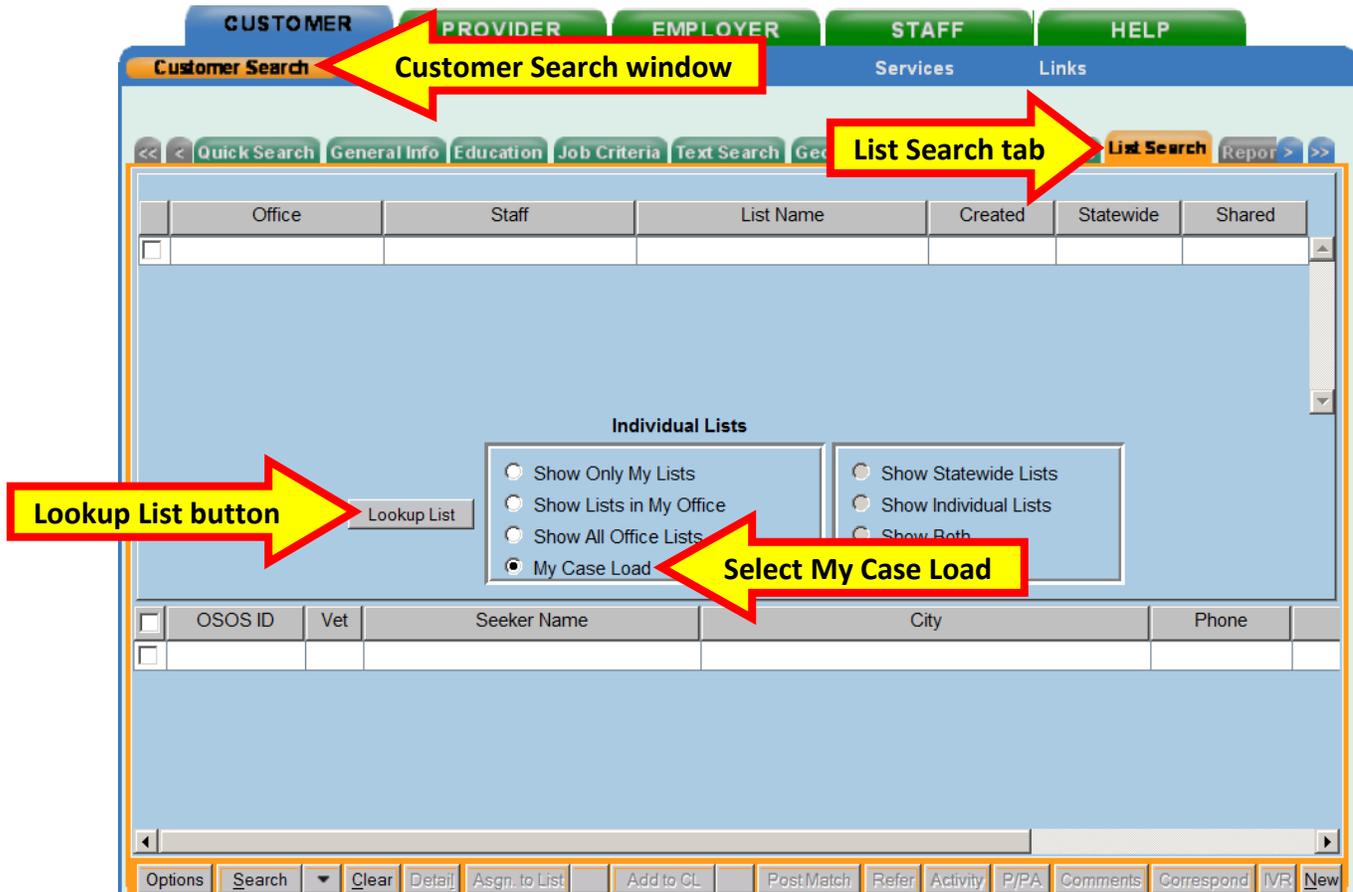
These preferences may be saved for future searches by checking the box next to **Set as My Defaults** and clicking the **Save** button.

As the information and order are selected, it will appear in the column header.

Navigate to the **Customer Search** window and the **List Search** tab.

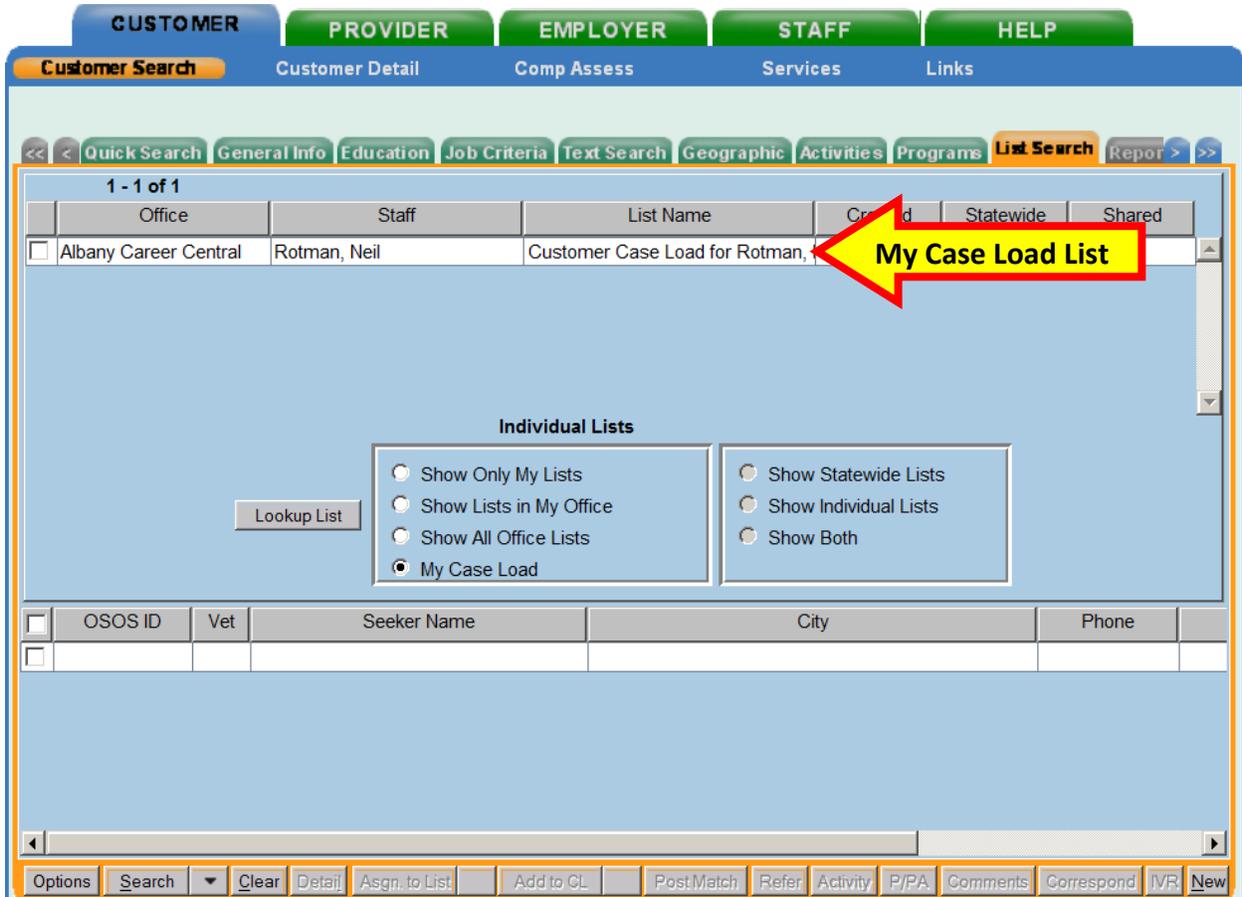
Select the **MY Caseload** option.

Click the **Lookup List** button.



The screenshot shows the OSOS Customer Search window. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The CUSTOMER tab is selected. Below this is the 'Customer Search' window header with 'Services' and 'Links' options. The main content area has a sub-header with tabs: Quick Search, General Info, Education, Job Criteria, Text Search, and List Search. The 'List Search' tab is selected. Below the sub-header is a table with columns: Office, Staff, List Name, Created, Statewide, and Shared. Below the table is a section titled 'Individual Lists' containing a 'Lookup List' button and a list of radio button options: Show Only My Lists, Show Lists in My Office, Show All Office Lists, My Case Load (selected), Show Statewide Lists, Show Individual Lists, and Show Both. Below the 'Individual Lists' section is another table with columns: OSOS ID, Vet, Seeker Name, City, and Phone. At the bottom of the window is a toolbar with buttons: Options, Search, Clear, Detail, Asgn. to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New. Red arrows point to the 'Customer Search window' header, the 'List Search' tab, the 'Lookup List' button, and the 'My Case Load' radio button.

The user's caseload will appear as the only list.

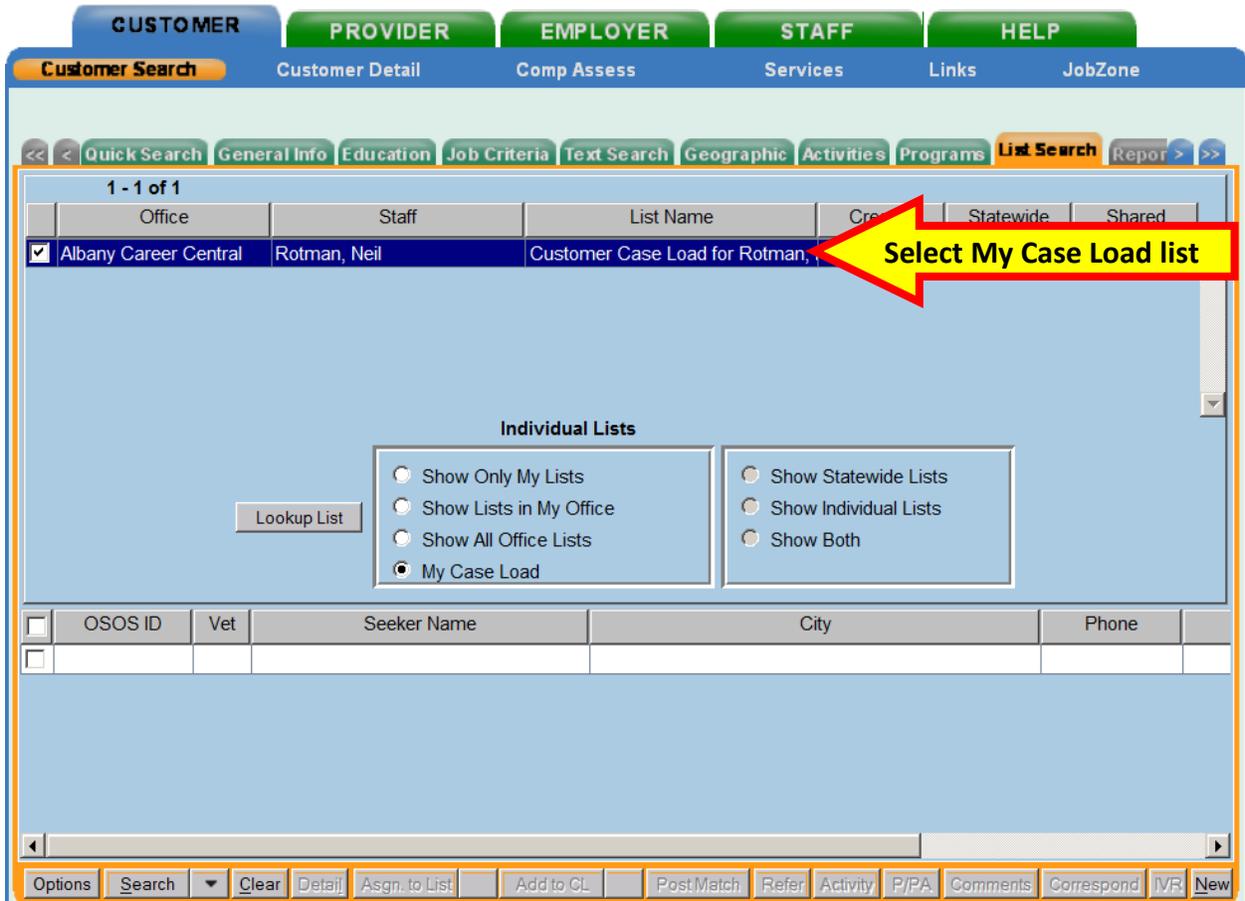


The screenshot shows the OSOS interface with the following elements:

- Navigation Bar:** CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP
- Sub-Menu:** Customer Search, Customer Detail, Comp Assess, Services, Links
- Search Filters:** Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, Report
- Search Results:** 1 - 1 of 1
 

Office	Staff	List Name	Created	Statewide	Shared
<input type="checkbox"/>	Albany Career Central	Rotman, Neil	Customer Case Load for Rotman, Neil		
- Individual Lists Section:**
  - Lookup List
  - Show Only My Lists  
 Show Lists in My Office  
 Show All Office Lists  
 My Case Load
  - Show Statewide Lists  
 Show Individual Lists  
 Show Both
- Table Headers:** OSOS ID, Vet, Seeker Name, City, Phone
- Footer:** Options, Search, Clear, Detail, Asgn. to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, New

Select the list.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The main content area is titled 'List Search' and shows a table with one entry selected. A red arrow points to this entry, and a yellow callout box contains the text 'Select My Case Load list'.

Office	Staff	List Name	Created	Statewide	Shared
<input checked="" type="checkbox"/>	Albany Career Central	Rotman, Neil	Customer Case Load for Rotman, Neil		

**Individual Lists**

- Show Only My Lists
- Show Lists in My Office
- Show All Office Lists
- My Case Load
- Show Statewide Lists
- Show Individual Lists
- Show Both

OSOS ID	Vet	Seeker Name	City	Phone
<input type="checkbox"/>				

Options: Search, Clear, Detail, Asgn. to List, Add to CL, Post/Match, Refer, Activity, P/PA, Comments, Correspond, IVR, New



Additional search criterion may be added to reduce the results to a portion of the records in **My Case Load**. Staff assigned to multiple offices may prefer to limit the search results to customers in a specific office.

This is useful when performing a customer match.

When all the search criteria have been selected, click the **Search** button.

The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search (highlighted), Customer Detail, Comp Assess, Services, Links, and JobZone. The main search area has several tabs: Quick Search, General Info, Education, Job Criteria, Text Search, and Geographic (highlighted with a red arrow and labeled 'Geographic tab').

Under the Geographic tab, there are two main sections: 'Internal Use' and 'Customer Match'. The 'Internal Use' section has a sub-section 'Assigned Offices' (highlighted with a red arrow and labeled 'Assigned Offices') containing five dropdown menus with the following options: Albany Career Central, Warren County Employment & Training, GLENS FALLS, SCHENECTADY, and an empty dropdown. The 'Customer Match' section has a 'Zip Code' label and four empty input fields.

Below the search criteria is a table with the following columns: OSOS ID, Vet, Seeker Name, City, and Phone. The table is currently empty.

At the bottom of the interface is a toolbar with several buttons: Options, Search (highlighted with a red arrow and labeled 'Search button'), Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

**CUSTOMER** PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links JobZone

1 - 32 of 32

Quick Search General Info Education Job Criteria Text Search Geographic Activities Programs List Search Report

1 - 1 of 1

	Office	Staff	List Name	Created	Statewide	Shared
<input checked="" type="checkbox"/>	Albany Career Central	Rotman, Neil	Customer Case Load for Rotman,	04/13/2015	No	

Individual Lists

Lookup List

- Show Only My Lists
- Show Lists in My Office
- Show All Office Lists
- My Case Load
- Show Statewide Lists
- Show Individual Lists
- Show Both

<input type="checkbox"/>	OSOS ID	Vet	Seeker Name	City	Phone	Email	
<input type="checkbox"/>	NY012619868	No	Lost, Hopelessly	albany			Active
<input type="checkbox"/>	NY012815858	No	Malinak, 599	Albany	518-457-0000	malinak@yahoo.com	Active
<input type="checkbox"/>	NY012743917	No	Malinak, 6.3.01	Albany	518-485-1111	6.3@yahoo.com	Active
<input type="checkbox"/>	NY012809350	No	Malinak, 6.3.03	albany	518-457-0000	malinak@yahoo.com	Active
<input type="checkbox"/>	NY012972935	No	Malinak, 6.4.00 1/2	albany		me@yahoo.com	Active
<input type="checkbox"/>	NY013062107	Yes	Malinak, Albanyveteran	Albany	518-457-6586	veteran@yahoo.com	Active
<input type="checkbox"/>	NY005719389	No	Malinak, R.I.	Albanv	755-757-4777	himalinak@msn.com	Active

Options Search Clear Detail Asgn. to List Add to CL Post/Match Refer Activity P/PA Comments Correspond IVR New

You may then select one or more customer records to export to an Excel spreadsheet as described earlier in this guide.

## RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found at:

<http://labor.ny.gov/workforcenypartners/osos.shtm>

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

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