

**NEG Disaster
Irene / Lee
OSOS Guide**



PURPOSE

This desk guide will cover the recording of activities associated with the NEG Disaster grant. It will cover data entry necessary for:

- tracking job seekers that have submitted a preliminary registration,
- recording jobseeker eligibility,
- identifying the required grant documentation that will be maintained in the participant file,
- documenting referrals to the hiring agency or business and
- documenting individuals hired.

REPORTING WILL BE PROVIDED PER COUNTY.

Log into OSOS and perform a customer search. Search for the customer using the Social Security number or the customer's name. If the **No Match Found** message is received, then click the **New** button at the bottom right side of the screen to create a new record. Enter in all pertinent data.

OSOS DATA ENTRY

AGENCY INFO TAB

The Agency Info tab shows what area or areas are working with the customer. A customer must be active in an agency, with an intake date and an enrollment date, in order for the enrollment data to be entered.

The screenshot displays the OSOS web interface for the 'Agency Info' tab. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, and Services (which is currently selected). The main content area shows customer information: Malinak, Wildbill H., SSN: [redacted], and OSOS ID: NY010444790. A secondary set of tabs includes Agency Info, Achievement Objectives, Services, Service History, Enrollments, Outcomes, Comments, Audit, and Training Ad. The Agency Info section contains the following fields:

- Agency: Westchester Bal./Putnam WAE (dropdown menu)
- Intake Date: 10/18/2011 (text input)
- Enrollment Date: 10/18/2011 (text input)
- Termination Date: [empty text input]
- Termination Reason: [empty dropdown menu]
- Status: Active (text input)

Below the form is a table with two columns: Agency and Status. The table contains one entry: Westchester Bal./Putnam WAE with a status of Active. At the bottom of the form are buttons for 'New Agency' and 'Delete Agency'. The footer of the interface includes a 'Save' button and navigation links for 'Customer Detail', 'Comp Assess', 'Comments', and 'Check Labor Market Information'.

Once the **Agency Info** tab is reviewed, it is important to check the **Service History** and **Enrollments** tab, to determine who has been providing services to the customer and what services have been provided.



If more than one Agency (Local Workforce Investment Area or WAE) is working with a customer, be sure to inform a supervisor and contact the other area(s) to coordinate services. Contact information can be obtained from:

- the One-Stop Career Center location list found at <http://www.labor.state.ny.us/workforcenypartners/osview.asp>,
- local area security coordinators,
- supervisors, or the
- OSOS Central Security office.

The Agency may be inactive if the Termination Date and Termination Reason is entered into the Agency Info tab. This indicates that the area is no longer working with the customer.



Customer Search Customer Detail Comp Assess **Services**

Malinak, Wildbill H. SSN: OSOS ID: NY010444790

<< < **Agency Info** Achievement Objectives Services Service History Enrollments Outcomes Comments Audit Training Ad > >>

● Agency: Orange WAE

● Intake Date: 06/13/2011 Enrollment Date: 06/13/2011

Termination Date: 07/12/2011

Termination Reason: Services No Longer Needed

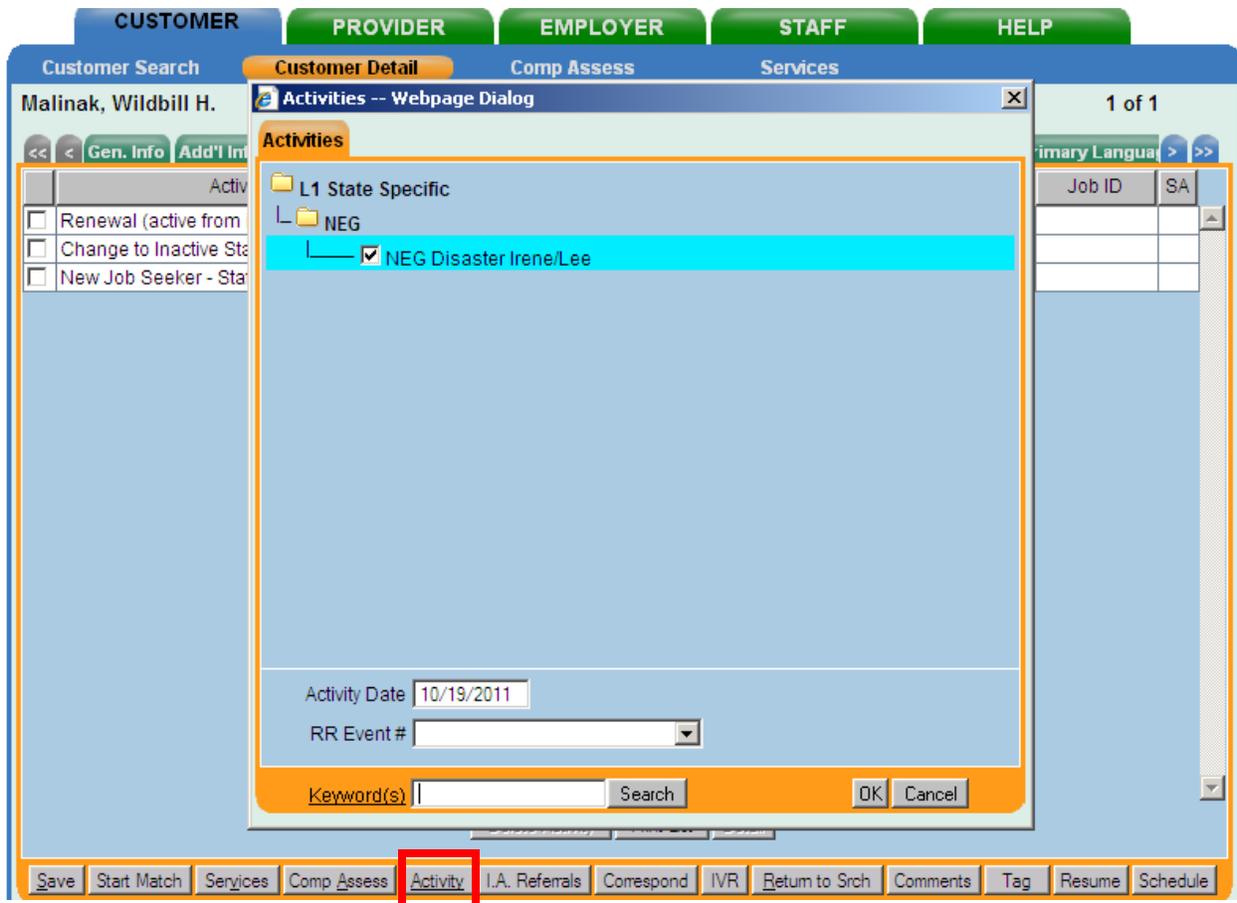
Status: Inactive

Agency	Status
<input checked="" type="checkbox"/> Orange WAE	Inactive

CUSTOMER DETAIL

The Department plans to track the number of customers that apply to the program. Tracking applications requires the user to enter an activity into the customer record.

In the **Customer Detail** window of the **Customer** module, click the **Activity** button at the bottom of the screen. Record the L1 State Specific Activity **NEG Disaster Irene/Lee** to identify that the customer completed a preliminary registration indicating interest in temporary employment provided by the grant. This activity will be used to identify customers that completed preliminary registrations. This activity will be used for reporting purposes only and will not create or extend any program enrollment.



DOCUMENTING ELIGIBILITY

To be eligible an applicant must meet one of the three requirements:

- Dislocated due to the disaster
- Identified as a Dislocated Worker
- Considered Long term unemployed, which is more than 26 continuous weeks of unemployment

In the **Add'l Info** tab of the **Customer Detail** Window, click the **Programs Public Assistance** button. Enter **Yes** for Dislocated Worker and date determined to be eligible.



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

Malinak, Wildbill H. | SSN: | OSOS ID: NY010444790 | 1 of 1

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

Programs

Programs/Public Assistance Selection

Income Status

Lower Living Standard: Yes

Income 70% LLSIL: N/A

Local Priority: N/A

Disability Status: Not Disabled

Migrant / Seasonal Worker: Yes No

Military Service

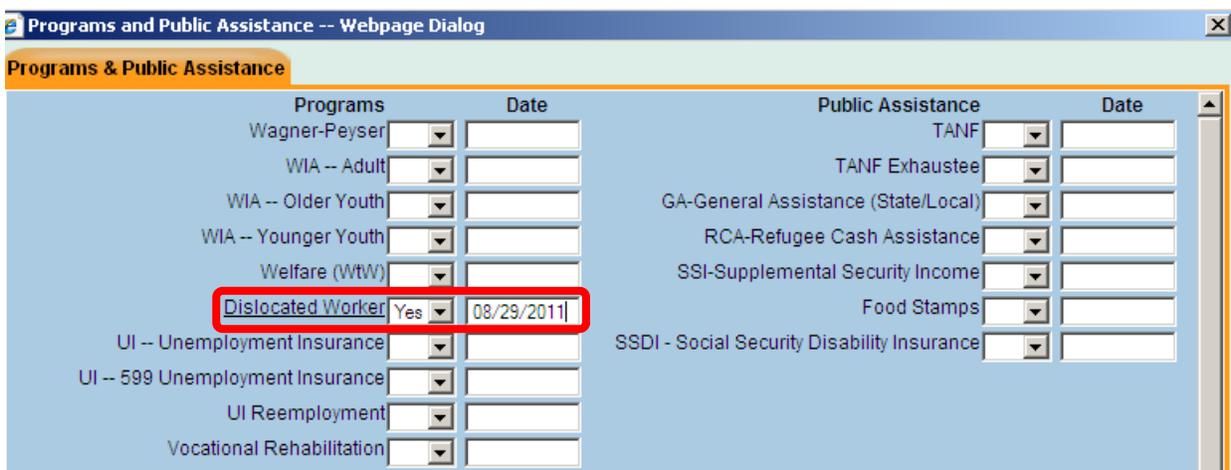
Service Veteran:

Customer List Participation

List Name

Malinak Test List2

Assign To List Remove

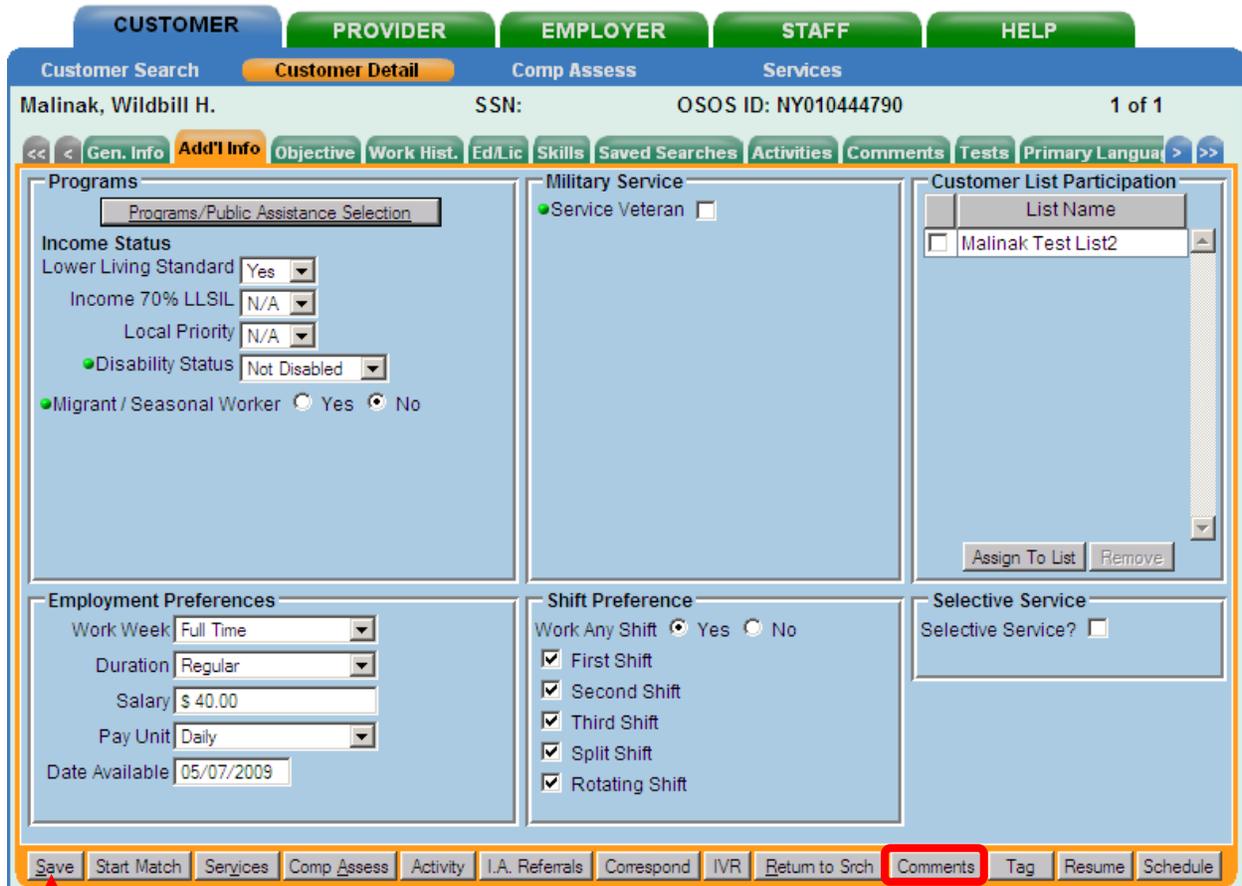
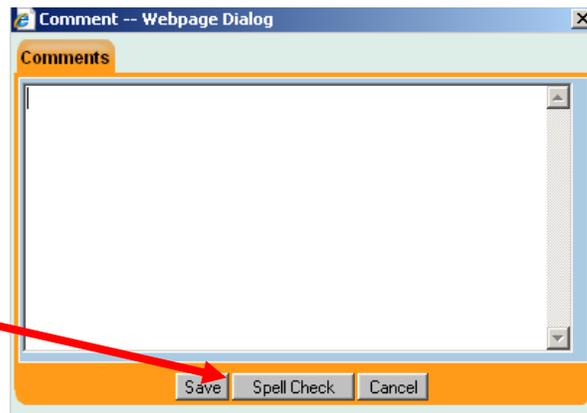


Programs and Public Assistance -- Webpage Dialog

Programs & Public Assistance

Programs	Date	Public Assistance	Date
Wagner-Peyser		TANF	
WIA -- Adult		TANF Exhaustee	
WIA -- Older Youth		GA-General Assistance (State/Local)	
WIA -- Younger Youth		RCA-Refugee Cash Assistance	
Welfare (WtW)		SSI-Supplemental Security Income	
Dislocated Worker Yes	08/29/2011	Food Stamps	
UI -- Unemployment Insurance		SSDI - Social Security Disability Insurance	
UI -- 599 Unemployment Insurance			
UI Reemployment			
Vocational Rehabilitation			

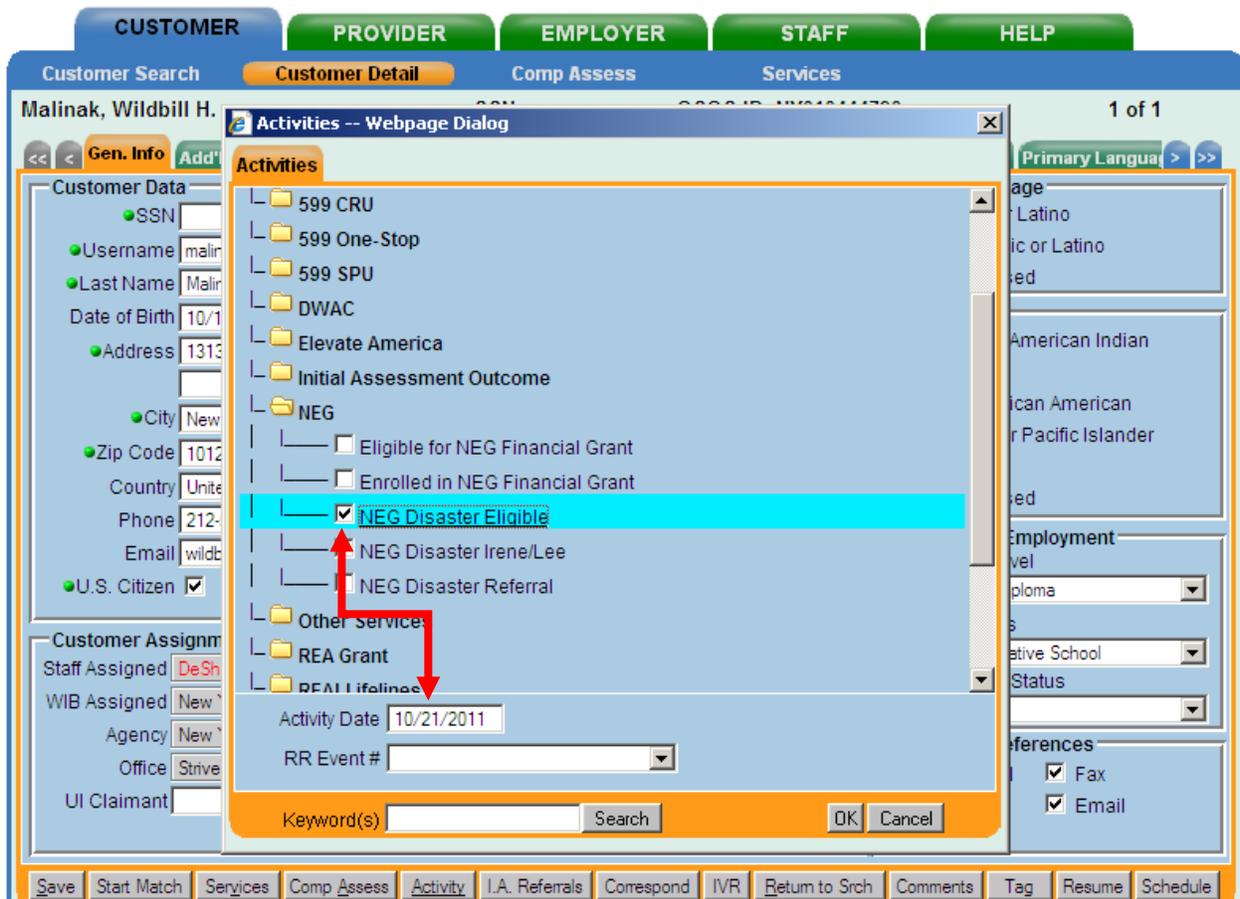
In the **Customer Detail** window of the **Customer** module, click the **Comment** button and enter a comment identifying how and under which eligibility criteria the customer was determined eligible.

Once you have entered the comment **Save** the comment and **Save** the record.

Documentation in Participant file – The *participant* file must document the participants' eligibility. Due to the circumstances surrounding the disaster, documentation of eligibility may be difficult to obtain during the initial stages. The Department is prepared to accept an individual's signed certification that they meet the eligibility criteria. The Grantee should have a system in place to verify eligibility for individuals once better data are available. If the Grantee has such a system in place, and if a participant is later found to be ineligible, the costs incurred prior to the discovery of ineligibility will not be disallowed.

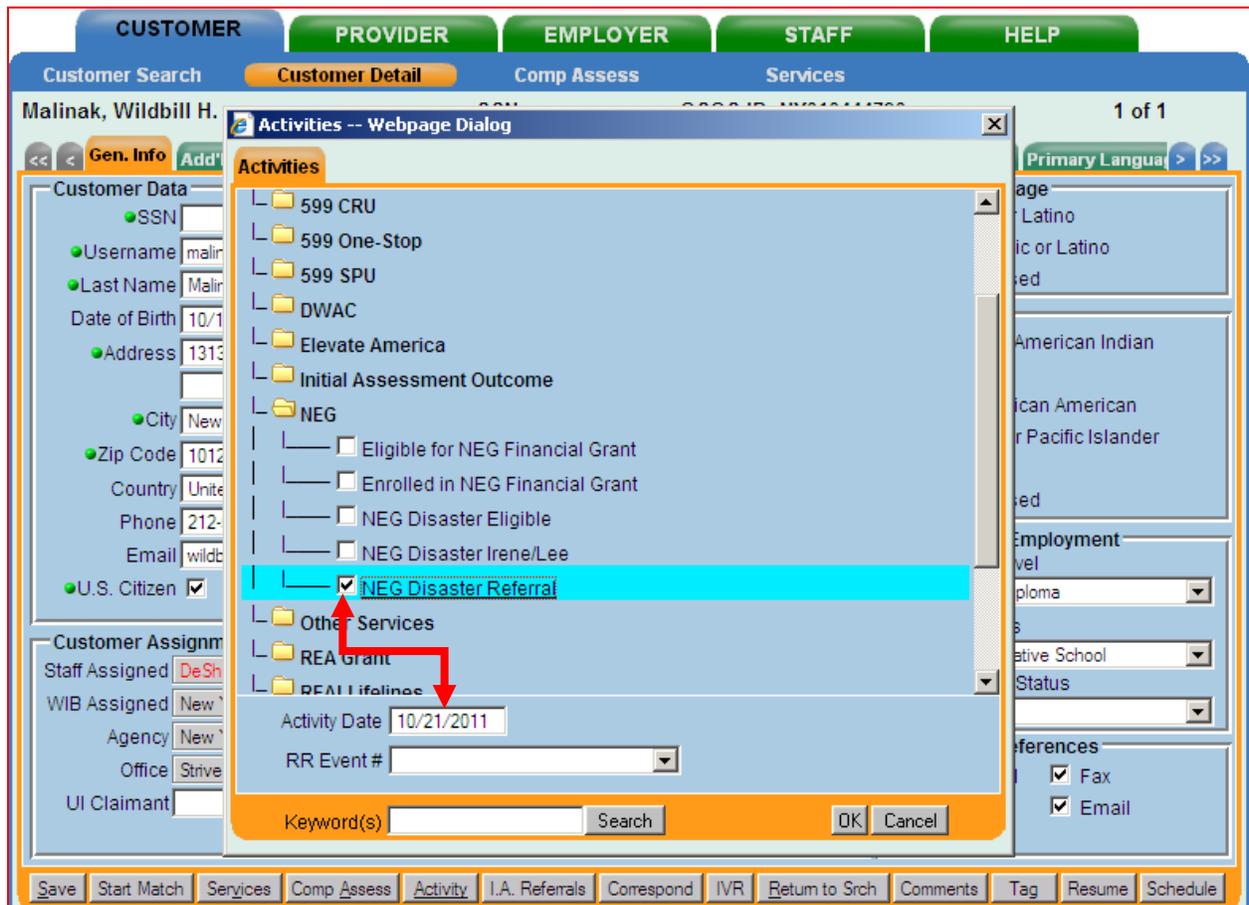
In the **Customer Detail** window of the **Customer** module, press the **Activity** button at the bottom and data enter the L1 State Specific Activity **NEG Disaster Eligible**. The activity date will automatically populate with the current date. The Activity Date of this activity should be the date you determined the customer eligible. If necessary, change the current date to the actual date.



Verify the Activity Date is correct and hit the **OK** button. Then **Save** the record.

DOCUMENTING REFERRALS TO HIRING AGENCY/BUSINESS

A new L1 State Specific Activity has been created to track customers referred to the hiring agency or business that will be the employer of record under the grant. Once a customer has been determined eligible and staff will be referring the customer to the hiring agency or business for consideration, staff must enter the new **NEG Disaster Referral** activity by pressing the **Activity** button. Staff should then select the activity as pictured below.



The screenshot shows the OSOS software 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, and Services. The main window displays customer information for Malinak, Wildbill H. A dialog box titled 'Activities -- Webpage Dialog' is open, showing a list of activities. The 'NEG Disaster Referral' activity is selected, and the 'Activity Date' is set to 10/21/2011. A red arrow points to the 'Activity Date' field. The dialog box also includes fields for 'RR Event #' and 'Keyword(s)', and buttons for 'Search', 'OK', and 'Cancel'.

Verify the **Activity Date** is correct and press the **OK** button. Remember to **Save** the record.



Record this Activity only when the customer is determined eligible and referred as a potential hire to the hiring agency/business.

The three L1 State Specific Activities (**NEG Disaster Irene/Lee**, **NEG Disaster Eligible**, and **NEG Disaster Referral**) will be used for reporting purposes only. These activities will not create or extend any program enrollment.

PROVIDER MODULE

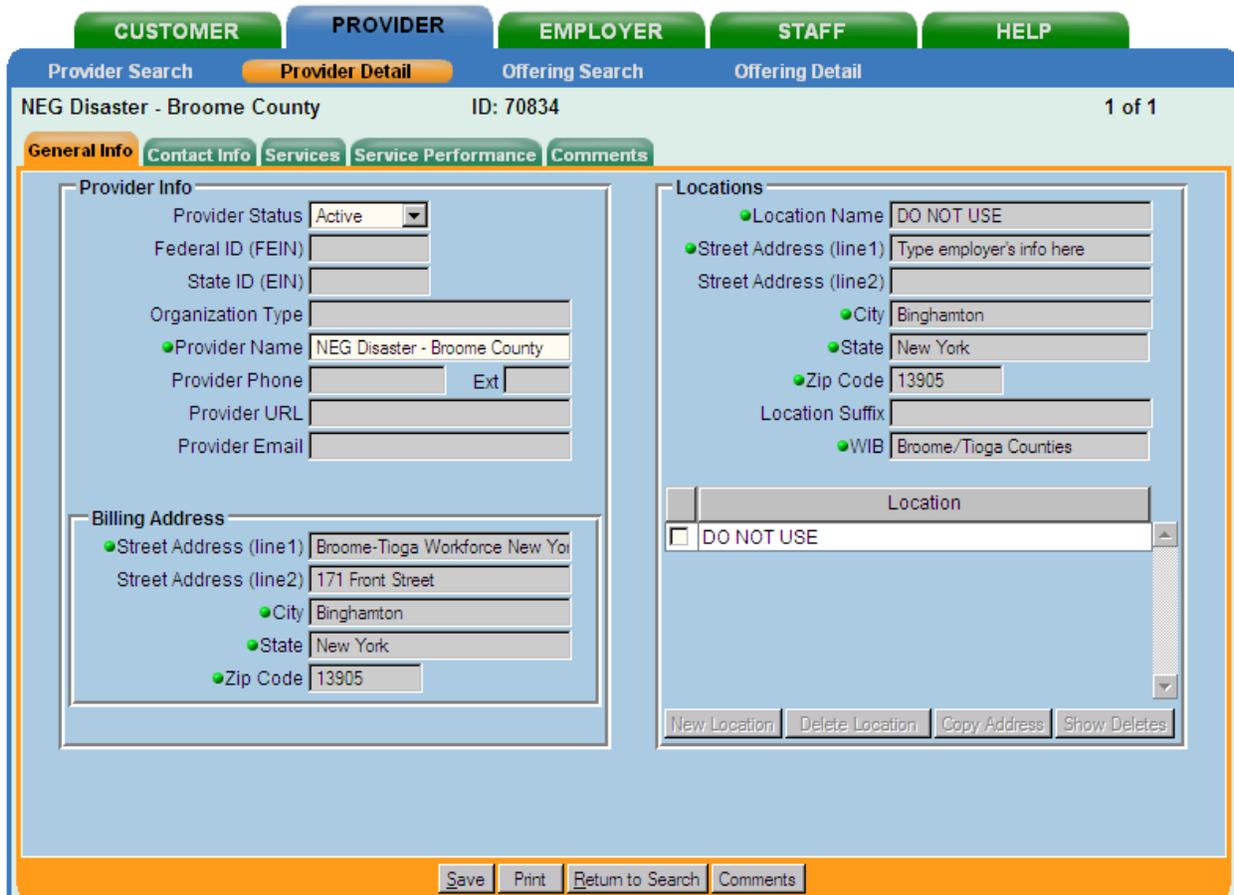
SETTING UP THE PROVIDER LOCATION

The Provider has been entered for you. The Provider Name is different for each county and is listed as **NEG Disaster – (County Name)**.

The screen shot below shows the Provider for Broome County. The Provider Name is **NEG Disaster - Broome County**.

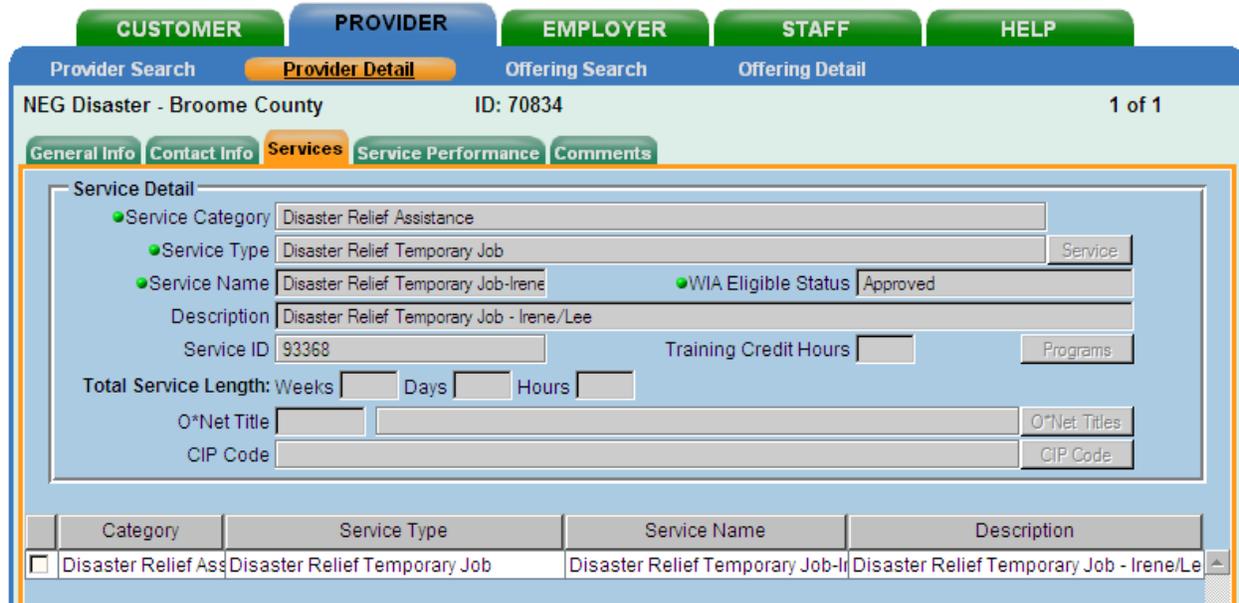


*The Initial Location Name is listed as **DO NOT USE**. Do not use this location for any placed customer. This “Dummy” location has been entered as a “placeholder” because OSOS requires at least one location to be included to save the Provider information. Please Delete or overwrite this location as soon as you have a valid location to enter for this Provider.*



The screenshot shows the 'Provider Detail' screen for 'NEG Disaster - Broome County' (ID: 70834). The interface includes tabs for 'General Info', 'Contact Info', 'Services', 'Service Performance', and 'Comments'. The 'General Info' tab is active, showing fields for 'Provider Status' (Active), 'Federal ID (FEIN)', 'State ID (EIN)', 'Organization Type', 'Provider Name' (NEG Disaster - Broome County), 'Provider Phone', 'Provider URL', and 'Provider Email'. Below this is the 'Billing Address' section with fields for 'Street Address (line1)', 'Street Address (line2)', 'City', 'State', and 'Zip Code'. To the right is the 'Locations' section, which contains a table with one entry: 'Location Name' (DO NOT USE), 'Street Address (line1)' (Type employer's info here), 'Street Address (line2)', 'City' (Binghamton), 'State' (New York), 'Zip Code' (13905), 'Location Suffix', and 'WIB' (Broome/Tioga Counties). Below the table are buttons for 'New Location', 'Delete Location', 'Copy Address', and 'Show Deletes'. At the bottom of the screen are buttons for 'Save', 'Print', 'Return to Search', and 'Comments'.

The single service listed for the **NEG Disaster – Irene/Lee Provider** is named **Disaster Relief Temporary Job - Irene/Lee**.



The screenshot shows the OSOS interface with the following details:

- Navigation:** CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, HELP
- Page Header:** Provider Search, Provider Detail (selected), Offering Search, Offering Detail
- Page Info:** NEG Disaster - Broome County, ID: 70834, 1 of 1
- Sub-headers:** General Info, Contact Info, Services (selected), Service Performance, Comments
- Service Detail Form:**
 - Service Category: Disaster Relief Assistance
 - Service Type: Disaster Relief Temporary Job
 - Service Name: Disaster Relief Temporary Job-Irene
 - Description: Disaster Relief Temporary Job - Irene/Lee
 - Service ID: 93368
 - WIA Eligible Status: Approved
 - Total Service Length: Weeks, Days, Hours
 - O*Net Title, CIP Code
- Table:**

Category	Service Type	Service Name	Description
<input type="checkbox"/>	Disaster Relief Ass	Disaster Relief Temporary Job	Disaster Relief Temporary Job - Irene/Lee

Documenting Individuals Hired requires:

- One provider record will be setup for each of the 37 authorized counties.
- Each employer of record within the county will be entered as a Provider Location.
- One L2 service will be setup to record the “Job Placement” as Temporary Employment.
- One service offering will be setup for each employer of record.
- The starting date may not be before 8/31/2011.
- The end date of the program is 12/31/2012.
- Service will be funded with **NEG Disaster Funds**. This service will co-enroll the customer in Labor exchange (LEX), WIA and Common Measures.

This will allow OSOS to track individuals hired by county and easily identify the customer’s employer of record. This service is used to track total participants enrolled/hired and participants currently working in a NEG Disaster position during the reporting period.



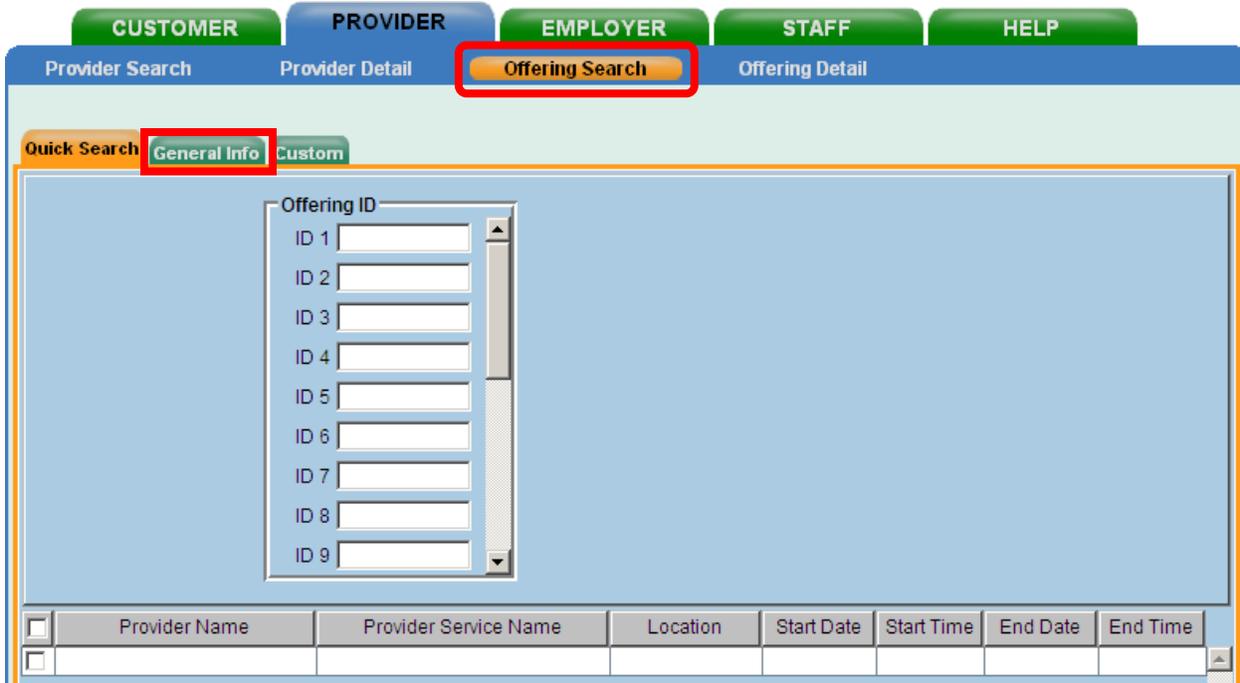
SERVICES MODULE

The **Services** module is where WIA Level 2 services are manually entered, and where some Activities are created as functionally aligned services.

The **Disaster Relief Temporary Job L2** service is entered through the **Services** tab of the **Services** window by clicking the **New Service** button on the bottom of the screen.

The screenshot displays the OSOS Services module 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, and Services (which is highlighted). The main header shows the customer name 'Malinak, Jumper', SSN, OSOS ID: NY010444810, and 'Record Saved'. A secondary set of tabs includes Agency Info, Achievement Objectives, Services (highlighted), Service History, Enrollments, Outcomes, Comments, Audit, and Training Ad. The main content area is divided into two sections: 'Detail' and 'Funding'. The 'Detail' section contains various input fields for provider name, costs, dates, and program information. The 'Funding' section includes a table with columns for Level, Source, Obligated, Actual, and Oblig #, along with summary fields for Total Funding, Petition #, and RR Event #. Below these sections is a table with columns for Achievement Objective and Service, listing items like 'Assessment Interview, Initial Assessment' and 'STCR Business Systems, Inc.'. At the bottom, there is a row of buttons, with 'New Service' highlighted by a red box. Other buttons include Delete Service, Authorization, IPA Service Summary, Payments, Tracking, Change Actual Cost, Save, Customer Detail, Comp Assess, Comments, and Check Labor Market Information.

You will be automatically redirected to the **Offering** Search window in the **Provider** Module. Click the **General Info** tab.

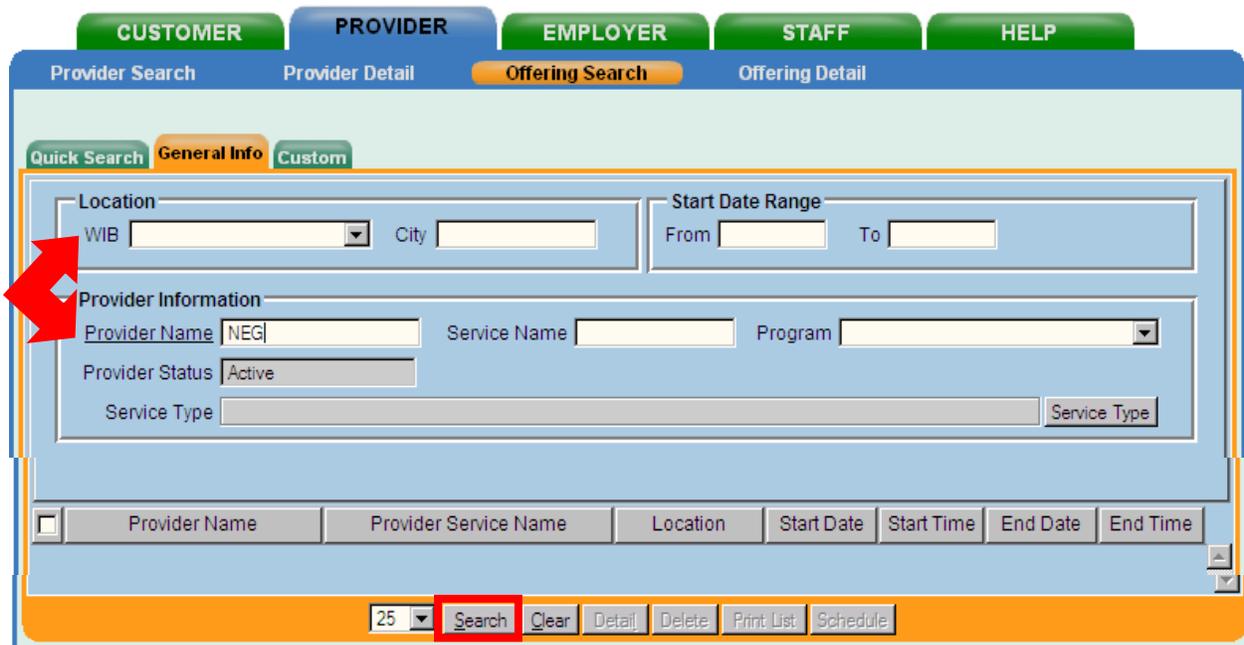


The screenshot shows the OSOS interface with the following elements:

- Top navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP.
- Sub-navigation tabs: Provider Search, Provider Detail, **Offering Search** (highlighted), Offering Detail.
- Search sub-tabs: Quick Search, **General Info** (highlighted), Custom.
- Main content area: A list of 'Offering ID' fields (ID 1 through ID 9) with input boxes and a vertical scrollbar.
- Table at the bottom with columns: Provider Name, Provider Service Name, Location, Start Date, Start Time, End Date, End Time.

OSOS will automatically default to the LWIB that the user has logged into. If the customer will be placed in a county belonging to a different LWIB, then change the LWIB or leave blank.

Type **NEG** into the **Provider Name** and click the **Search** button.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (selected), and Offering Detail. The main content area has three sub-tabs: Quick Search, General Info (selected), and Custom. The 'General Info' tab contains several input fields: Location (WIB dropdown and City text box), Start Date Range (From and To text boxes), Provider Information (Provider Name text box with 'NEG' entered, Service Name text box, Program dropdown, Provider Status dropdown with 'Active' selected, and Service Type text box with a 'Service Type' button). At the bottom, there is a table header with columns: Provider Name, Provider Service Name, Location, Start Date, Start Time, End Date, and End Time. Below the table header is a row of buttons: a dropdown menu showing '25', a 'Search' button (highlighted with a red box), 'Clear', 'Detail', 'Delete', 'Print List', and 'Schedule'.

The **Search** button will navigate the user to the Offering screen.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Provider Search Provider Detail Offering Search Offering Detail

1 - 2 of 2

Quick Search General Info Custom

Location: WIB City Start Date Range: From To

Provider Information:

 Provider Name: Service Name: Program:

 Provider Status:

 Service Type: Service Type

<input type="checkbox"/>	Provider Name	Provider Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>	NEG Disaster - Essex County	Disaster Relief Temporary Job-Irene/Lee	Elizabethtow				
<input type="checkbox"/>	NEG Disaster - Broome County	Disaster Relief Temporary Job-Irene/Lee	Binghamton				

Place a check mark in the box to highlight the **Provider Service Name** and **Location** where the customer will be employed and press the **Schedule** button.

Remember that the **Provider Name** must list the county that referred the jobseeker and the location should list the city where the Employer of Record is located.

<input type="checkbox"/>	Provider Name	Provider Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>	NEG Disaster - Essex County	Disaster Relief Temporary Job-Irene/Lee	Elizabethtow				
<input checked="" type="checkbox"/>	NEG Disaster - Broome County	Disaster Relief Temporary Job-Irene/Lee	Binghamton				

Search Clear Detail Delete Print List Schedule

You will now be redirected back to the **Services** tab of the customer record. The **Service Name**, **Service Description**, **Service Type**, **Provider** name and **Location** Name will all be automatically populated from the **Provider**, **Service**, and **Offering** you had selected. Review the information in the **Service** screen to be sure that you have selected that correct offering. If it is not the correct offering, then press the **New Service** button and repeat the selection process.

In order to save the service, you will need to enter in the **Planned Start Date**, **Actual Start Date**, **Planned End Date** and **Program Svc Type**, and then save the record.

<< < Agency Info Achievement Objectives **Services** Service History Enrollments Outcomes Comments Audit Training Ad >>

Detail
 Service Name: Disaster Relief Temporary Job-Irene/Lee
 Service Desc.:
 Service ID: 6424800
 Service Type: Disaster Relief Temporary Job
 Provider Name: NEG Disaster - Broome County
 Location Name:
 Provider ID: 72675 Offering ID:
 Plan. Start Date: 08/28/2011 Plan. End Date: 02/29/2012
 Actual Start Date: 08/28/2011 Actual End Date:
 Completed Successfully:
 Next Contact Date:
 Program Service Type: Non-ITA Training
 Part Time Learn.: Distance Learn.:

Funding

Level	Source	Obligated	Actual	Oblig #
<input type="checkbox"/>				

 Total Funding: Add Edit Delete
 Petition #:
 RR Event #:

Achievement Objective	Service
<input type="checkbox"/>	Initial Assessment
<input type="checkbox"/>	TEST 511
<input type="checkbox"/>	STCR Business Systems, Inc.
<input checked="" type="checkbox"/>	Disaster Relief Temporary Job-Irene/Lee

New Service Delete Service Authorization IPA Service Summary Payments Tracking Change Actual Cost

Save Customer Detail Comp Assess Comments Check Labor Market Information

FUNDING

Select the **WIB Level NEG Disaster – Irene/Lee** Funding Source and press **OK**.

Funding -- Webpage Dialog

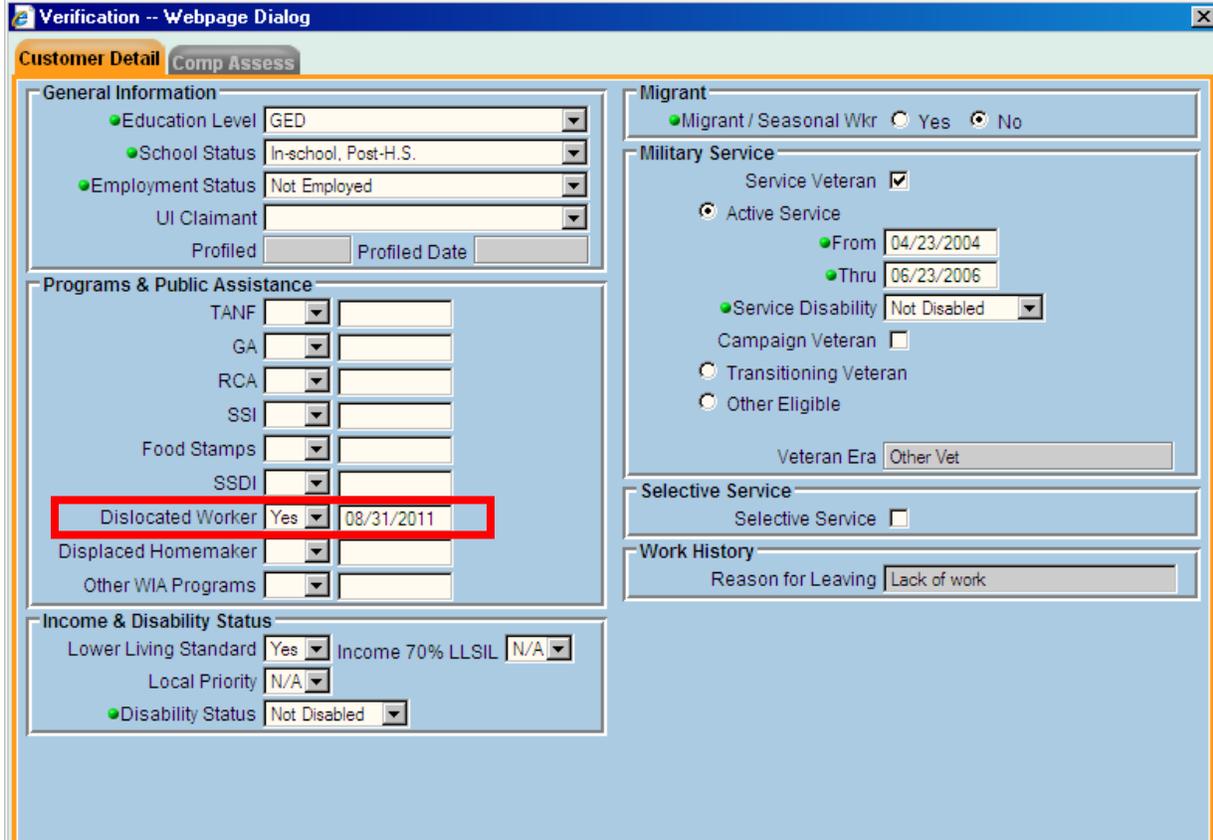
Funding

Level	Funding Source	Year	Remaining
<input type="checkbox"/>	State Adult Statewide 15%	2009	\$ 971314.00
<input type="checkbox"/>	State Adult Statewide 15%	2010	\$ 7441.50
<input type="checkbox"/>	WIB Adult Statewide 15%	2010	\$ 9999.00
<input type="checkbox"/>	State DHP State Funded	2010	\$ 953.50
<input type="checkbox"/>	State NEG ARRA - OJT	2010	\$ 0.00
<input type="checkbox"/>	WIB NEG ARRA - OJT	2010	\$ 9931.00
<input type="checkbox"/>	WIB NEG Disaster - Irene/L	2011	\$ 510713.00

Obligated Amount: \$ 1.00 OR Obligated Percentage: 100

OK Cancel

If the funded service creates a new enrollment, the **Enrollment Verification Webpage Dialog** box will pop up. Review all the information carefully to ensure all the information is correct. The customer must be designated as a **Dislocated Worker**.



Verification -- Webpage Dialog

Customer Detail **Comp Assess**

General Information

- Education Level: GED
- School Status: In-school, Post-H.S.
- Employment Status: Not Employed
- UI Claimant: []
- Profiled: [] Profiled Date: []

Programs & Public Assistance

- TANF: [] []
- GA: [] []
- RCA: [] []
- SSI: [] []
- Food Stamps: [] []
- SSDI: [] []
- Dislocated Worker: Yes 08/31/2011**
- Displaced Homemaker: [] []
- Other WIA Programs: [] []

Income & Disability Status

- Lower Living Standard: Yes Income 70% LLSIL: N/A
- Local Priority: N/A
- Disability Status: Not Disabled

Migrant

- Migrant / Seasonal Wkr: Yes No

Military Service

- Service Veteran:
- Active Service:
 - From: 04/23/2004
 - Thru: 06/23/2006
- Service Disability: Not Disabled
- Campaign Veteran:
- Transitioning Veteran:
- Other Eligible:
- Veteran Era: Other Vet

Selective Service

- Selective Service:

Work History

- Reason for Leaving: Lack of work

NEG DISASTER IRENE / LEE TRAINING PROGRAM

The Training program begins 1/1/2013 and ends 12/31/2013.

Eligibility requires the participant to have been employed under the **NEG Disaster Irene / Lee Temporary Employment** program.

All 37 counties that participated in the **NEG Disaster Irene / Lee Temporary Employment** program are eligible to participate in the **NEG Disaster Irene / Lee Training** program.

Training programs must follow the LWIB's policy for **ITA** and **Non-ITA** training. Training Providers and each individual service, other than OJT providers must have **WIA Eligible Status** listed in the **Eligible Training Provider List (ETPL)**. The training program does not have to be related to the Disaster clean up.

All training and intensive services provided under this program will be tracked and reported through the attachment of **WIB Level NEG Disaster – Irene/Lee** Funding. Therefore, all **Intensive Services** must be listed as L2 services rather than entered as an





Activity. The **Intensive Service** must conform to the **Provider, Provider Service** and procedure described earlier in this guide beginning on Page 9.

If you have already data entered intensive services as activities or did not appropriately attach the OJT to the Provider or create the appropriate Provider Service and Offering, then you will need to enter the service correctly and then delete the inappropriate entries.



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