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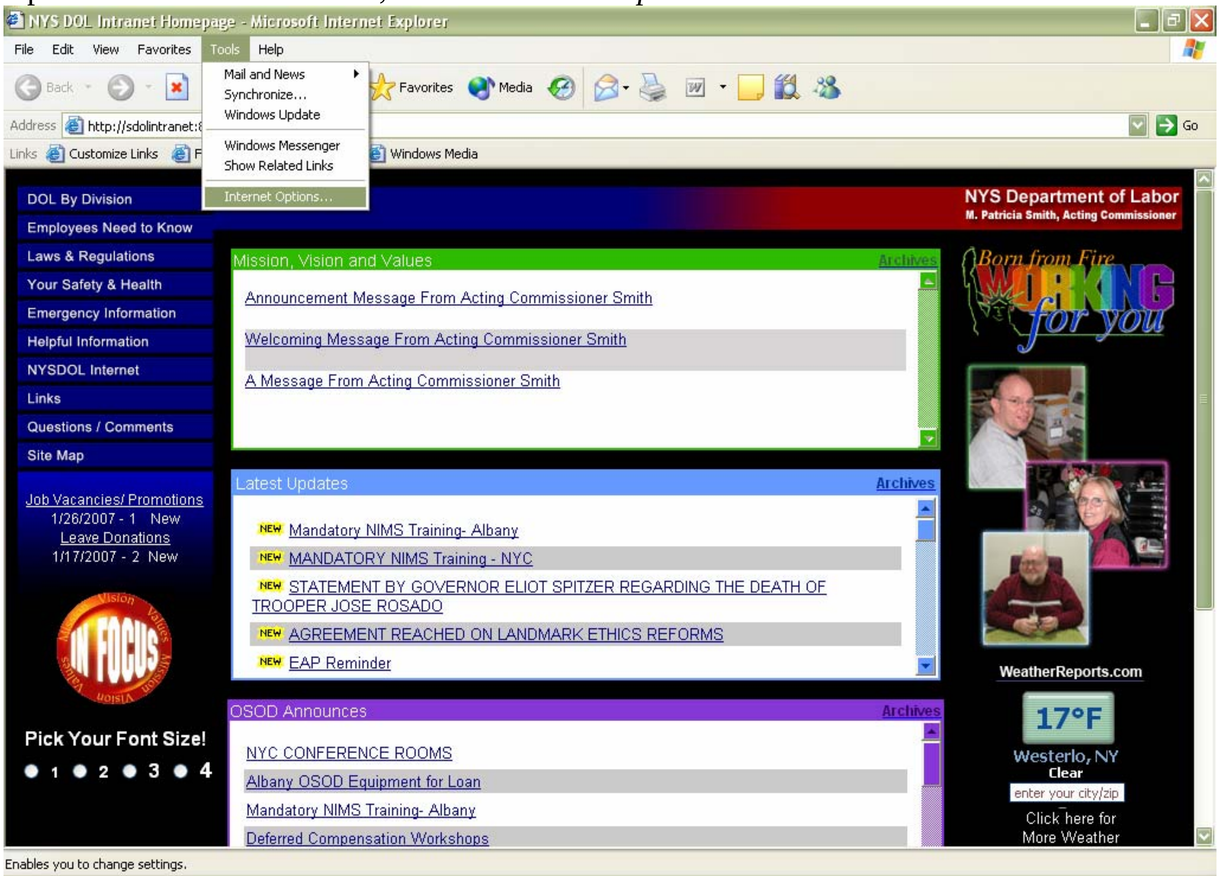
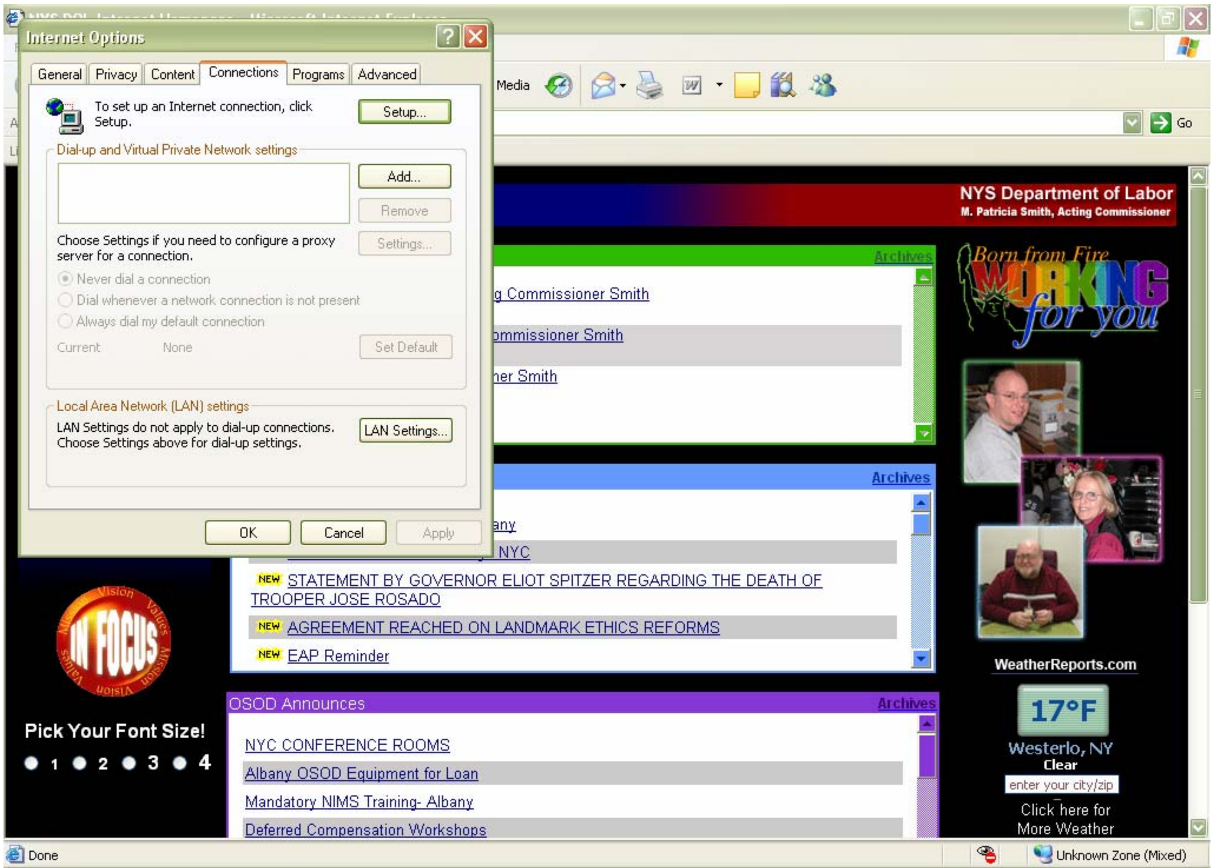
Internet Explorer Browser Settings

Before you begin using REOS you need to make sure that your Internet Explorer Browser Settings are correct.

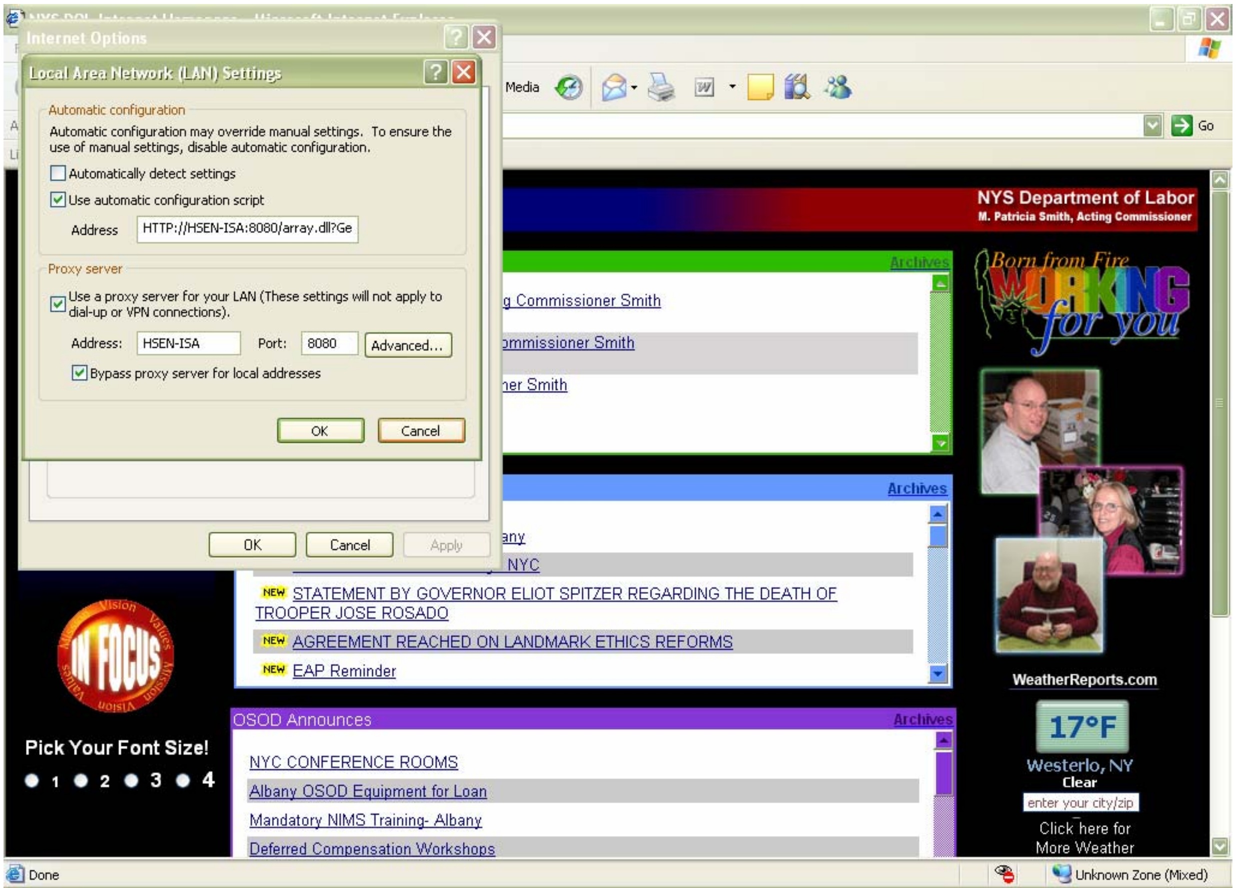
1. Open Browser click on *Tools*, click on *Internet Options.*



2. Click on the *Connections* Tab, click on *LAN Settings*


Internet Options
General
Privacy
Content
Connections
Programs
Advanced
To set up an Internet connection, click Setup.
Setup...
Dial-up and Virtual Private Network settings
Add...
Remove
Choose Settings if you need to configure a proxy server for a connection.
Settings...
Never dial a connection
Dial whenever a network connection is not present
Always dial my default connection
Current
None
Set Default
Local Area Network (LAN) settings
LAN Settings do not apply to dial-up connections. Choose Settings above for dial-up settings.
LAN Settings...
OK
Cancel
Apply
NYS Department of Labor
M. Patricia Smith, Acting Commissioner
Born from Fire
WORKING for you
Archives
STATEMENT BY GOVERNOR ELIOT SPITZER REGARDING THE DEATH OF TROOPER JOSE ROSADO
AGREEMENT REACHED ON LANDMARK ETHICS REFORMS
EAP Reminder
Pick Your Font Size!
1 2 3 4
OSOD Announces
NYC CONFERENCE ROOMS
Albany OSOD Equipment for Loan
Mandatory NIMS Training- Albany
Deferred Compensation Workshops
WeatherReports.com
17°F
Westerlo, NY
Clear
enter your city/zip
Click here for More Weather
Done
Unknown Zone (Mixed)

3. In the screenshot below, make sure the *Use automatic configuration script* box is selected and HTTP://HSEN-ISA:8080/array.dll?Get.Routing.Script is displayed in the *Address* box from the *Automatic Configuration* section, and both boxes are selected in the lower *Proxy Server* section. Please reference the screenshot below.



4. Click *OK* twice.

Screen Resolution Settings

Please note: REOS was designed for a screen resolution setting of 1024x768. You will not be able to view the full screen of REOS at a larger setting.

1. Click the *START* button on the lower left hand side of your computer screen.
2. Click on *Settings.*
3. Click on *Control Panel.*
4. Click on *Display.*
5. Click on the *Settings* tab on the *Display Properties* window.
6. Set the *Screen resolution* (lower left hand corner of window) to 1024x768 by clicking and dragging the resolution indicator until it displays the proper setting.
7. Click on *Apply.*

For REOS help contact the REOS Help Desk at:
Help.Reos@labor.state.ny.us

We are also in the Outlook address book under: labor.sm.Reos.Help

REOS Letter Generation Setup Instructions

Beginning on the next page of this section is a list that shows each REOS Office and the location of the server housing your REOS data files. Please look up your REOS server using this chart and then follow the steps below.

1. Double click on the *My Network Places* icon on your Desktop. **Please note**: Before proceeding to Step 2, look to see if your server name (from the list starting on the next page of this section) already appears in this list. If so, please skip to Step 5.
2. Click on *Search* on the toolbar.
3. There will be a pop-up with the question *Which Computer are you looking for?* in the space provided type in the name of your server from the list beginning on the next page of this section and click on the *Search* button.
4. The server name should appear on the right hand side of the screen. Double click on the server name.
5. A list of folders should appear. Double click on the *DATA* folder.
6. Find the *REOS Letter Generation* folder for your office and double click on it. (i.e., Albany_REOS Letter Generation) **(Note that more than one office may be sharing the same server/data file – make sure you select your office.)**
7. In the *REOS Letter Generation* folder for your office there will be an icon named *Shortcut to Letter Generation*. Right click on the shortcut and click on *Copy*. Minimize the *My Network Places* window and return to your desktop. Right click on any blank spot on your Desktop and click on *Paste*. The Letter Generation shortcut will now be on your Desktop.
8. Back in the *My Network Places* window right click on the icon named *Shortcut to Data* and click on *Copy*. Minimize or exit the *My Network Places* window and return to your Desktop. Double click to open the *My Documents* icon. Right click on any blank spot in your *My Documents* and click on *Paste*. The Data shortcut will be in your *My Documents* folder.

Important Information: The *REOS Letter Generation* folder for your office will contain the following:

Application folder – This folder contains your office's *Letter Generation* database, which will be used to create your letters.

Data folder – This folder is where you will save your data files for use with the *Letter Generation* database.

Images folder – This folder contains copies of all letters that have been generated with your office's *Letter Generation* database.

Letters folder – This folder contains the letter templates that can be used by your office.

Shortcut to Data – This shortcut should be placed in your M*y Documents* folder to make it easier to locate the *Data* folder when saving your data file.

Shortcut to Letter Generation.mdb – This shortcut should be placed on your *Desktop* for easy access to the *Letter Generation* database for your office.

REOS Letter Generation Server Names

OSOS Office	Name of Office	Server
NY1010	Albany	fnphsen118aa
NY0570	Albion	fnphsen0a1ae
NY0350	Amsterdam	fnphsen0a1ae
NY0450	Auburn	fnphsen0a1ae
NY0540	Batavia	fnphsen0a1ae
NY0710	Buffalo	fnphsen970aa
NY0940	Corning	fnphsen0a1ae
NY0460	Cortland	fnphsen0a1ae
NY0780	Dunkirk	fnphsen970aa
NY0960	Elmira	fnphsen0m7aa
NY0900	Endicott	fnphsen0q3aa
NY0640	Freeport	fnphsenq2kaa
NY0590	Geneseo	fnphsen8n3aa
NY1560	Geneva	fnphsen0a1ae
NY0030	Glens Falls	fnphsen5d2aa
NY0340	Gloversville	fnphsen0a1ae
NY0620	Hauppauge	fnphsen9h7aa
NY0320	Herkimer	fnphsen3s0aa
NY0600	Hicksville	fnphsen2d8aa
NY0950	Hornell	fnphsen0a1ae
NY0090	Hudson	fnphsen5w1aa
NY0910	Ithaca	fnphsen5r0aa
NY0790	Jamestown	fnphsen970aa
NY0820	Kingston	fnphsen5w1aa
NY0740	Lockport	fnphsen970aa
NY3240	Lowville Common	fnphsen3s0aa
NY0250	Malone	fnphsen09eaa
NY0230	Massena	fnphsen0a1ae
NY0880	Middletown	fnphsen3b3aa
NY6215	Monroe	fnphsen8n3aa
NY0890	Monticello	fnphsen3b3aa
NY0530	Newark	fnphsen0a1ae
NY0850	Newburgh	fnphsen3b3aa
NY0730	Niagara Falls	fnphsen970aa
NY0920	Norwich	fnphsen0q3aa
NY5141	NY 514 - Harlem	fnphsenm6faa
NY5171	NY 517 - 54 St.	fnphsenm2eaa
NY5211	NY 521 - Morris Park	fnphsenb1baa
NY5221	NY 522 - South Bronx	fnphsenb3naa
NY5331	NY 533 - Schermerhorn	fnphsenk5zaa
NY5341	NY 534 - Bay Station	fnphsenk5zaa
NY5361	NY 536 - Metrotech - Lawrence St	fnphsenk5zaa
NY5411	NY 541 - Flushing	fnphsenq2kaa
NY5441	NY 544 - Jamaica	fnphsenq1kaa
NY5501	NY 550 - Staten Island	fnphsenr0naa

NY0210	Ogdensburg	fnphsen0a1ae
NY1790	Olean	fnphsen0i4aa
NY0380	Oneida	fnphsen9y2aa
NY0930	Oneonta	fnphsen0q3aa
NY0470	Oswego	fnphsen3f5aa
NY0630	Patchogue East	fnphsen9h7aa
NY0670	Patchogue West	fnphsen9h7aa
NY0800	Peekskill	fnphsen3b3aa
NY0802	Peekskill Carmel Putnam County	fnphsen3b3aa
NY0260	Plattsburgh	fnphsen09eaa
NY0860	Poughkeepsie	fnphsen1v3aa
NY0500	Rochester	fnphsen8n3aa
NY6202	Rochester - N. Goodman St.	fnphsen8n3aa
NY0300	Rome	fnphsen3s0aa
NY0270	Saranac Lake	fnphsen09eaa
NY0040	Saratoga Springs	fnphsen4e1aa
NY0870	Spring Valley	fnphsen3b3aa
NY0410	Syracuse	fnphsen9y2aa
NY0070	Troy	fnphsen0a1ae
NY0310	Utica Working Solutions	fnphsen3s0aa
NY0550	Warsaw	fnphsen970aa
NY6707	Washington County	fnphsen5d2aa
NY0240	Watertown	fnphsen9y2aa
NY0810	White Plains	fnphsen55oaa
NY0770	Williamsville	fnphsen970aa
NY0830	Yonkers	fnphsen55oaa

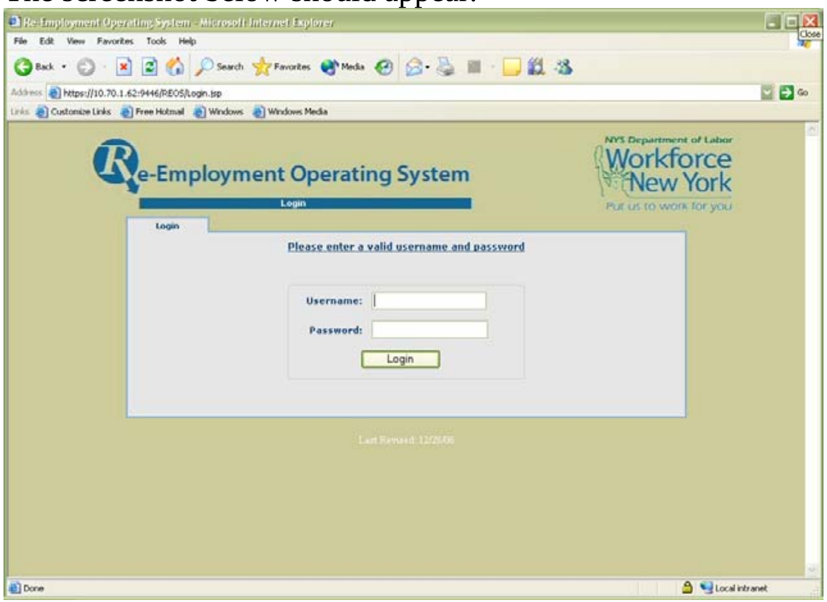
REOS Login Instructions

There are two REOS systems.

- **Production System Address –** this is the live system for **everyday use** by staff. Only information entered into the Production system is used for Department of Labor reporting and statistics. https://10.70.1.62:9446/REOS
- **Staging System Address –** this is the **practice system only**. Any functions performed in this system will not be written to a customer's record. The Production and Staging systems do not communicate with each other. **Please note**: When creating UI Issues in Staging you must change the default email address by deleting the default address and typing your own email address in its place. If you do not change the default email address an email will be sent to the TCC for action. http://10.70.1.63:9083/REOS

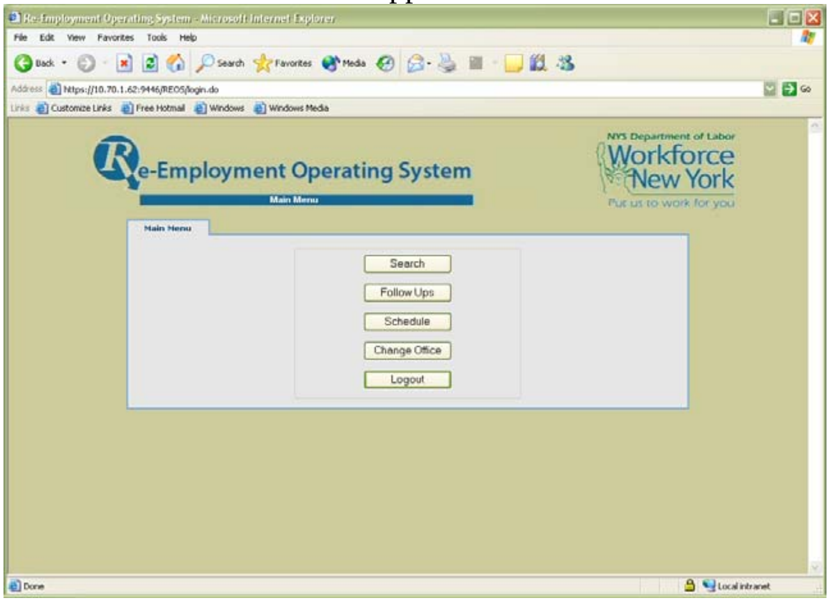
1. Open Internet Explorer and type the site address as it appears above and click on the *Go* button to the right of the address bar.

2. The screenshot below should appear.



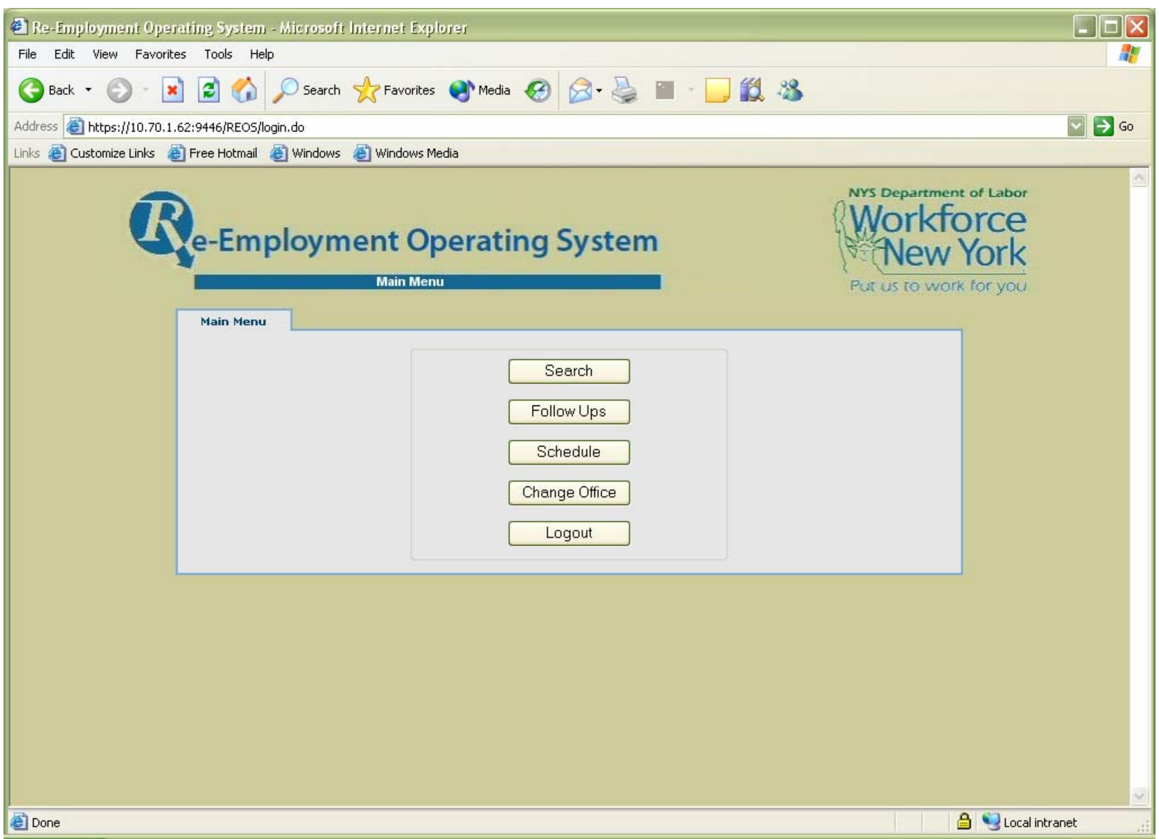
3. Enter your OSOS Username and Password, and click the *Login* button.

4. The *Main Menu* should now appear as in the screenshot below.



<u>Menu Descriptions</u>

<u>Main Menu</u>:



Search – This selection will bring you to the *Customer Search* screens. The only other option to perform any type of search is by clicking on the *New Search* button on the *Follow Up* screen.

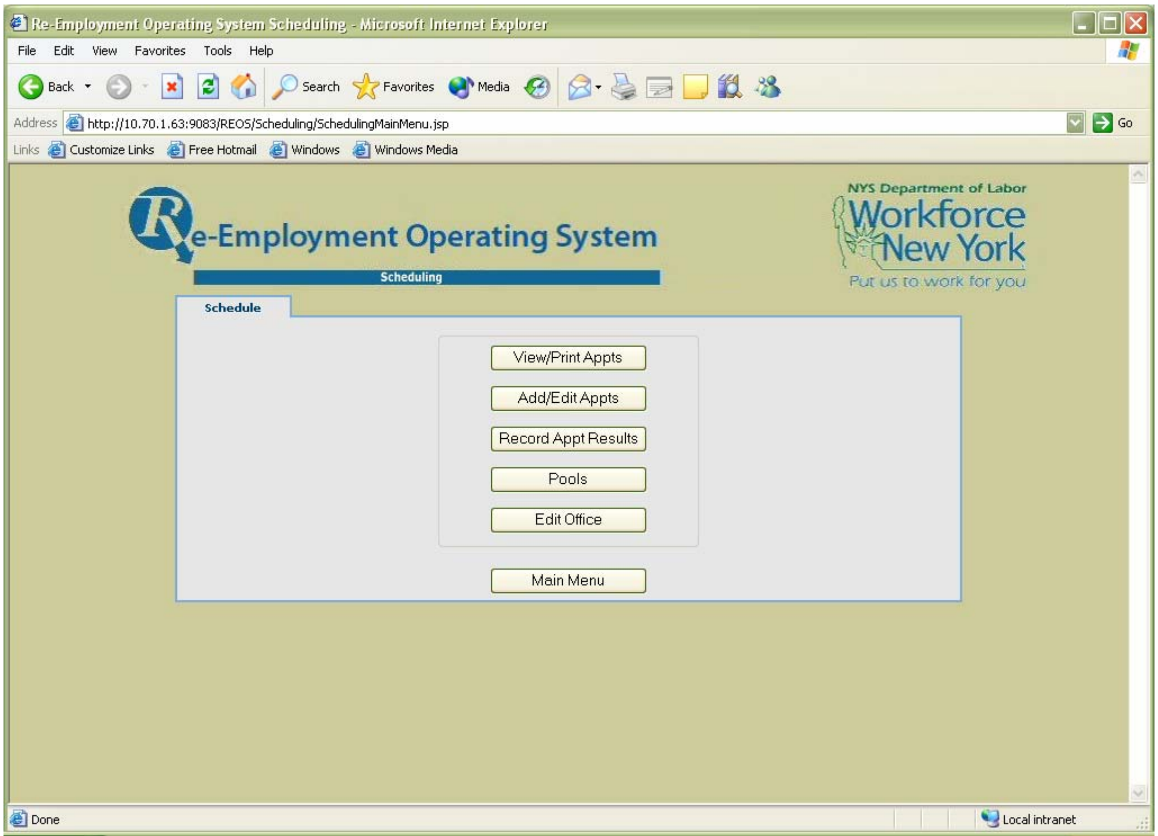
Follow Ups – This selection will bring you to the *Follow Up* screen. This is your only option to perform any maintenance on follow ups. You can view and/or schedule individuals that appear in your *Follow Up* screen, return to the *Main Menu* or create a new search from this screen. **Please note:** Only follow ups created by your office can be viewed from this screen.

Schedule – This selection will bring you to the *Scheduling Menu*. This menu allows you to view/print/add/edit/delete appointments; record appointment attendance results; maintain your office's address, phone number, fax number, letter types, and appointment locations; and initiate scheduling your weekly RSO pool. You may also return to the *Main Menu* from this screen.

Change Office – This selection allows you to choose between offices you currently have access to in OSOS.

Logout – This selection will allow you to correctly leave the REOS system.

<u>Scheduling Menu</u>:



View/Print Appts – This selection allows you to view and print your appointments. You have the option of viewing/printing your appointments by selecting a specific appointment or by selecting a date/date range.

Add/Edit Appts – This selection allows you to add new appointments and edit ones you have already created. **Please note**: You will not be able to use the edit or delete option once an individual(s) has been scheduled for that appointment.

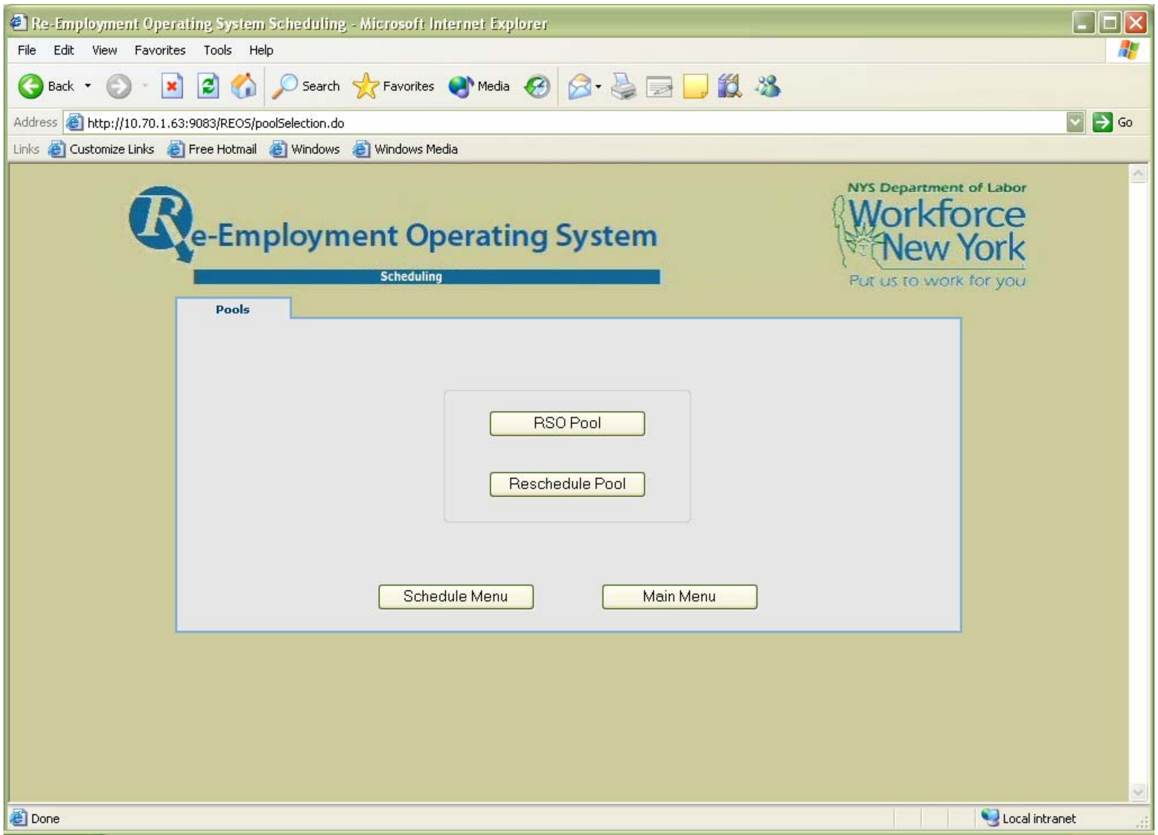
Record Appt Results – This selection allows you to enter appointment results, choose to reschedule individuals that did not attend their appointment, or place a hold on their UI benefits.

Pools – This selection will bring you to the *Pools Menu*. This menu allows you to open your office's weekly RSO Pool.

Edit Office – This selection allows you to maintain your office's address, phone number, fax number, letter types, and appointment locations. **Please note**: Your office's address, phone and fax number from this screen will be the return address information shown on your letters.

Main Menu – This selection will bring back to the *Main Menu*.

<u>Pools Menu</u>:



RSO Pool – This selection will bring you to your offices *RSO Pool* screen. This is the only way to access the RSO Pool.

Reschedule Pool – This selection will bring you to your offices *Reschedule Pool* screen. This is the only way to access the Reschedule Pool.

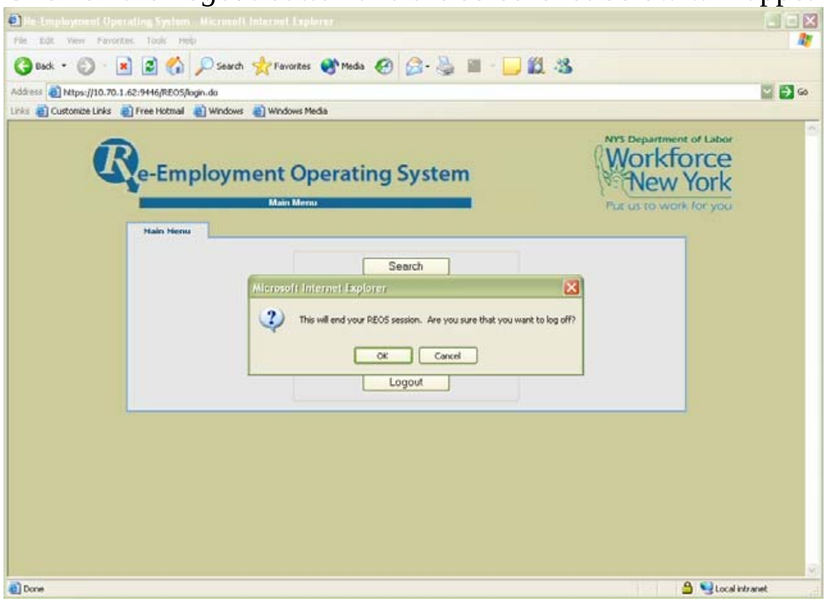
Schedule Menu – This selection will bring you back to the *Schedule Menu*.

Main Menu – This selection will bring you back to the *Main Menu*.

REOS Logout Instructions

1. Click the *Main Menu* button, which is visible at the bottom of all screens.

2. Click on the *Logout* button and the screenshot below will appear.

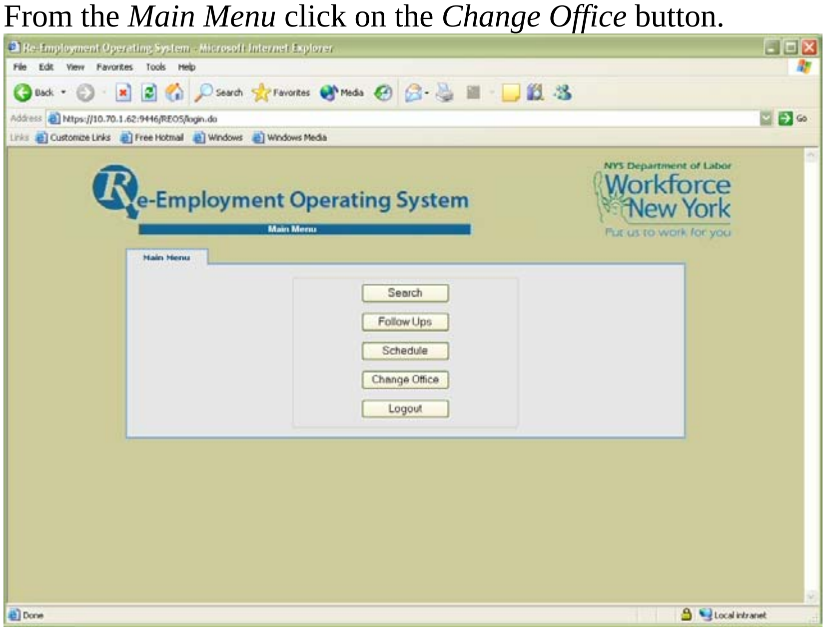


3. Click *OK* to the pop-up message and you will be brought back to the Login screen. At this point you may close your Internet Explorer window by clicking on the *X* in the upper right corner of your screen.

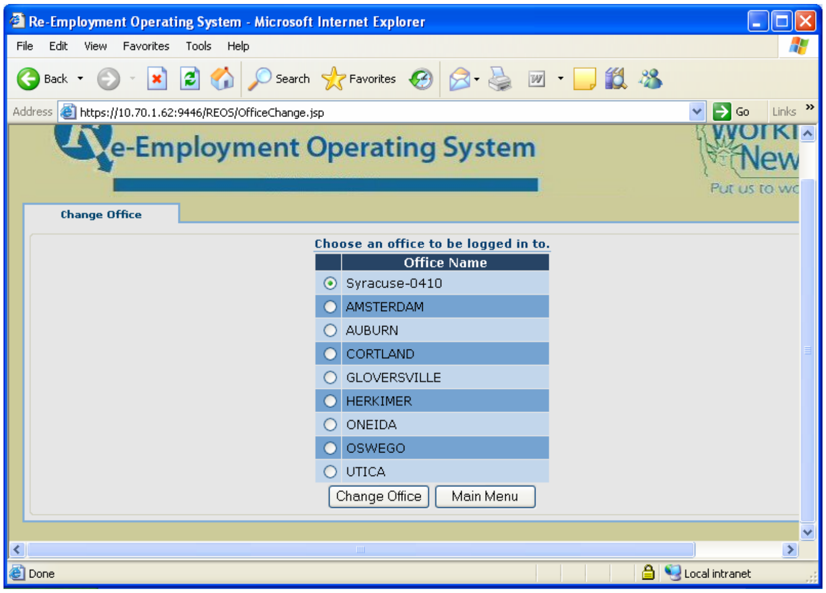
Changing Office Instructions

1. Login to REOS using your OSOS Username and Password.

2. From the *Main Menu* click on the *Change Office* button.



3. The screenshot below will appear. **Please note**: This screen will only list the offices that you have access to in OSOS. If you do not have access to the office in OSOS you will not be able to login to that office in REOS.



4. Click the button next to the office you would like to log into and click the *Change Office* button. The *Main Menu* will appear with a message stating *Office Changed*.

Helpful Information

Calendar Icon (**)** – When you click on this icon a calendar will appear for you to select a date. **Please note**: You should always use the calendar icon when possible. This will eliminate typing the date in an incorrect format.

Clear vs. Delete – When both the *Clear* and *Delete* buttons are available (RSO and Reschedule Pools), clicking on the *Clear* button will only remove the selected individuals from the list you are viewing, not from the pool. But if you click on the *Delete* button, you will remove the selected individuals from the pool.

Navigation – Whenever you are viewing multiple Customer Detail records, the *Prev* (

) and *Next* (

) arrows will be available for use. If you click on the *Next* arrow, you will advance to the next Customer Detail record. If you click on the *Prev* arrow, you will be brought back to the previous Customer Detail record.

Pool – A pool is a group of individuals that are sorted by common criteria (i.e., TLO, Union, RSO English, etc.) that need to be scheduled or rescheduled.

Printer Friendly Icon (**)** – When you click on this icon, a printer friendly version of your information will be displayed for printing.

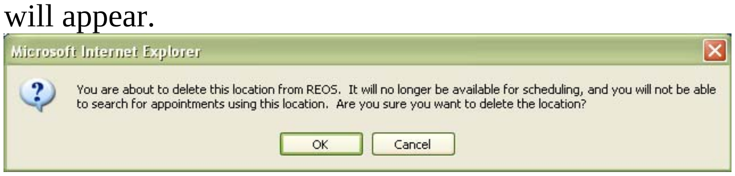
Sorting Icon (**)** – Whenever this icon is displayed, you can sort your results by clicking on the icon next to the column you would like to sort your results by.

Symbols – The following symbols are shown in REOS: < (less than), > (greater than), <= (less than or equal to), >= (greater than or equal to) and = (equal to).

Edit Office

1. Click on the *Schedule* button from *Main Menu.*
2. Click on the *Edit Office* button from *Scheduling Menu.*

3. At this point you can do one of the following:
   - To change the office address, correct the data in the *Office Address* section of this screen and click on the *Update* button to save your changes.
   - To add/edit/delete appointment locations (i.e., Conference Room 3, 5th floor)
     a. To add an appointment location, click on the button in the bottom left of the *Appointment Locations* section. Type the new location in the space provided next to the button and click on the *Add* button in the *Appointment Locations* section.
     b. To edit an appointment location, click on the button next to the location you wish to change. Make the changes to the appointment location you have selected and click the *Edit* button in the *Appointment Locations* section to save your changes.
     c. To delete an appointment location, click on the button next to the location you wish to remove and click the *Delete* button in the *Appointment Locations* section. The message box below will appear.



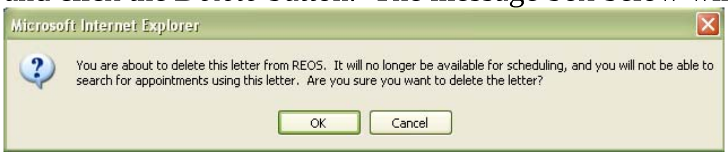
If you click on the *OK* button, the appointment location will be removed from the list and will no longer be available for scheduling or searching purposes. If you click on the *Cancel* button the appointment location will remain in the list and will be available for scheduling and searching purposes.

   - To add/edit/delete letter types (i.e., RSO_E_001, RSO English)
     a. To add a letter type, click the button in the bottom left of the *Letter Types* section. Type the name of the letter exactly as it appears in the letters folder on your server (Click here to locate your server information.) in the space provided for *Letter Types*. The letter type name should follow the naming convention of Purpose_Language_Version (i.e., RSO_E_001). Type a

description of the letter you are adding in the space provided for *Letter Description* (the description will be what appears in the *Letter Type* drop down box when scheduling). Click on the *Add* button in the *Letter Types* section. **Please note**: The letter must be in the *Letters* folder on your server. If you do not follow this process you will not be able to print when using this letter.

b. To edit a letter type, click the button next to the letter type/description you wish to change. Type the changes into the letter type you have selected and click the *Edit* button in the *Letter Types* section to save your changes.

c. To delete a letter type, click the button next to the letter type/description you wish to remove and click the *Delete* button. The message box below will appear.



If you click on the *OK* button, the letter type will be removed from the list and will no longer be available for scheduling or searching purposes. If you click on the *Cancel* button the letter type will remain in the list and will be available for scheduling and searching purposes.

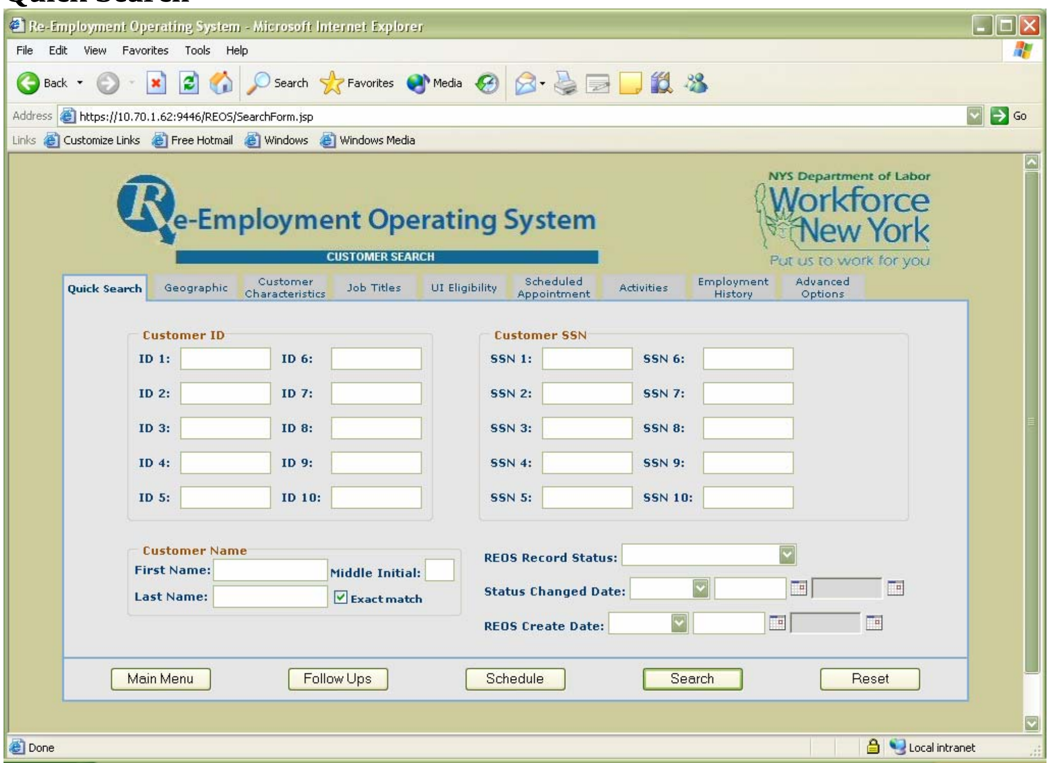
Search Features

The search screen consists of nine tabs; Quick Search, Geographic, Customer Characteristics, Job Titles, UI Eligibility, Scheduled Appointment, Activities, Employment History and Advanced Options. **Please note**: To navigate between search screen tabs click on the tab heading.

Default Search Settings: When the *REOS Record Status* drop down box is left blank the system defaults to *ACTIVE - REGULAR* status. When the *Reporting Office* drop down boxes are left blank the system defaults to the office you are currently signed into.

Click on the *Search* button from *Main Menu*. This will bring you to the *Quick Search* tab of the search screen.

Quick Search



Customer ID – To search by this field, type up to ten customer IDs in the space(s) provided by *ID 1* through *ID 10*. **Please note**: You are unable to search for both ID number(s) and SSN number(s) in the same search.

Customer SSN – To search by this field, type up to ten social security numbers (without typing the dashes, the system will automatically enter the dashes) in the space(s) provide by *SSN 1* through *SSN 10*. **Please note**: You are unable to search for both ID number(s) and SSN number(s) in the same search.

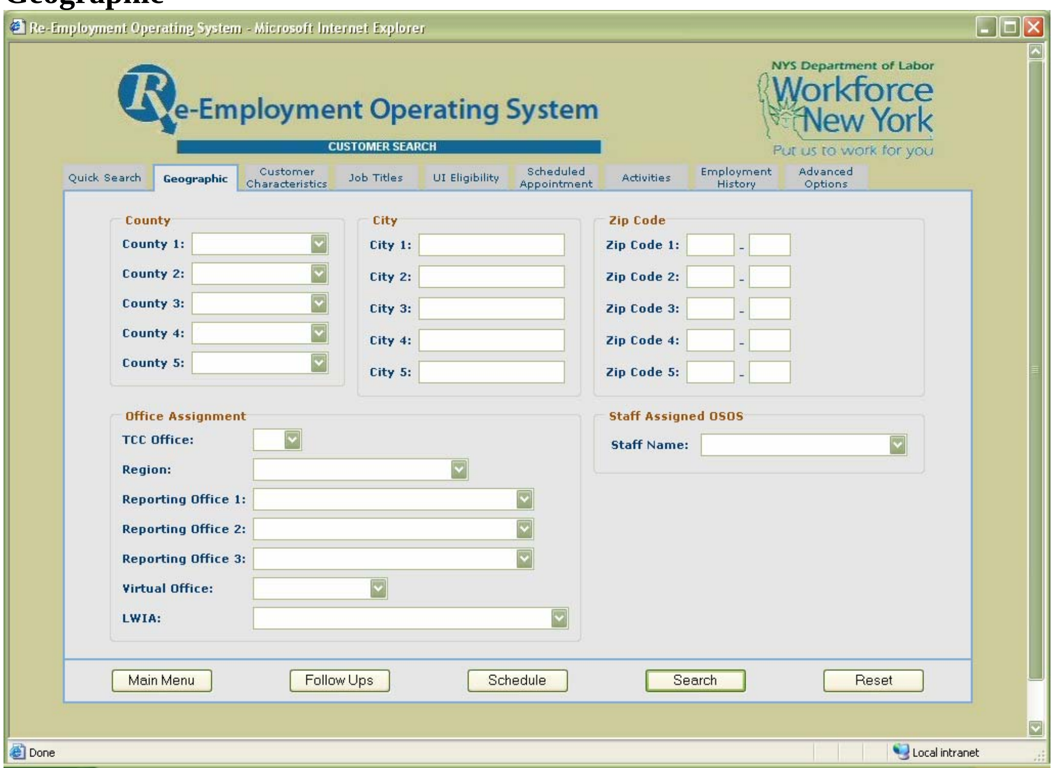
Customer Name – To search for an individual by name you can type their first name in the space provided next to *First Name*, their last name in the space provided next to *Last Name*, and their middle initial in the space provided next to *Middle Initial*. **Please note**: You do not need to enter *First Name* or *Middle Initial* in order to search, but when searching by name the *Last Name* field is required. Also, if you are not sure of the spelling of the individual's name, you can search similar spellings by clicking on the box to the left of *Exact match*. This will remove the check mark from the box.

REOS Record Status – To search for individuals with a specific REOS status, click on the *REOS Record Status* drop down box and select a status from the list provided.

Status Changed Date – To search for individuals who have changed statuses for a specific date or range of dates, click on the *Status Changed Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Status Changed Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

REOS Create Date – To search for individuals that have a REOS create date (the date the individual was downloaded into REOS) equal to a specific date or range of dates, click on the *REOS Create Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *REOS Create Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

Geographic



County – To search by county, click on the *County 1* drop down box and select a county from the list provided. You can search for up to five counties by repeating this process for the additional county drop down boxes.

City – To search by city, type the city name in the space provided next to *City 1*. You can search for up to five cities by repeating this process for the additional city boxes.

Zip Code – To search by zip code, type the zip code in the space provided next to *Zip Code 1*. You can search for up to five zip codes by repeating this process for the additional zip code boxes.

TCC Office – To search by TCC office, click on the *TCC Office* drop down box and select an office from the list provided.

Region – To search by region, click on the *Region* drop down box and select an option from the list provided.

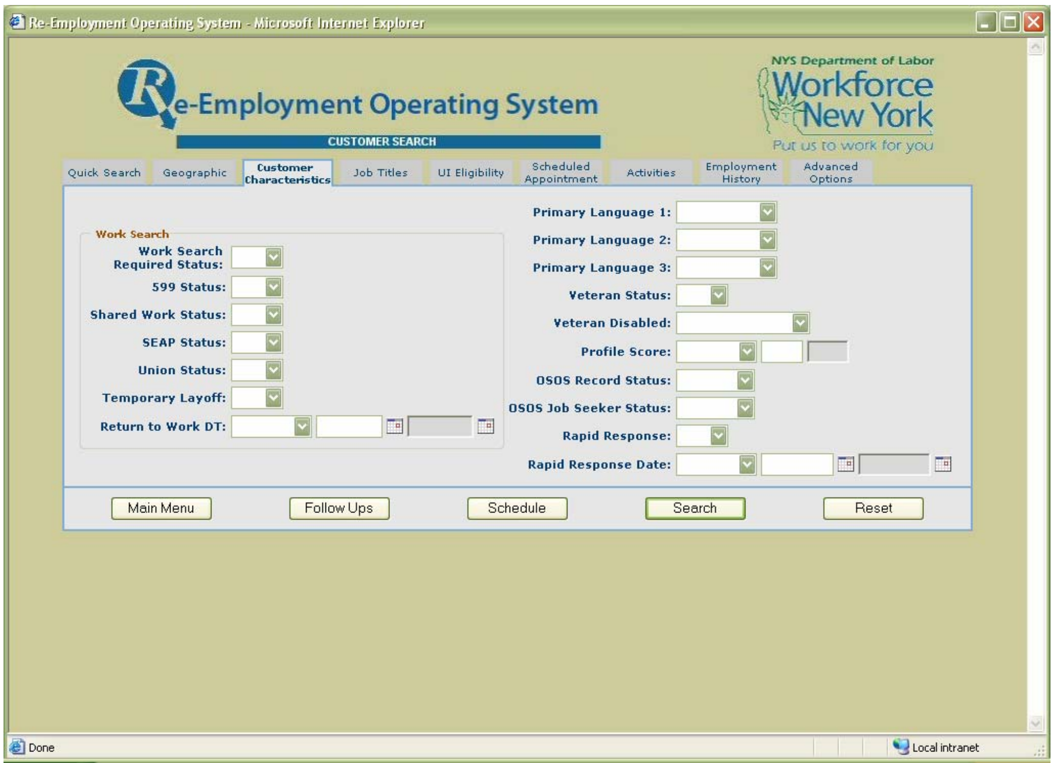
Reporting Office – To search by reporting office, click on the *Reporting Office 1* drop down box and select an office from the list provided. You can search for up to three reporting offices by repeating this process for the additional reporting office drop down boxes.

Virtual Office – To search by virtual office, click on the *Virtual Office* drop down box and select an office from the list provided.

LWIA – To search by LWIA, click on the *LWIA* drop down box and select an LWIA from the list provided.

Staff Name – To search by OSOS staff person assigned, click on the *Staff Name* drop down box and select a name from the list provided.

Customer Characteristics



Work Search Required Status – To search by work search required status, click on the *Work Search Required Status* drop down box and select *Yes* or *No*.

599 Status – To search by 599 status, click on the *599 Status* drop down box and select *Yes* or *No*.

Shared Work Status – To search by shared work status, click on the *Shared Work Status* drop down box and select *Yes* or *No*.

SEAP Status – To search by SEAP status, click on the *SEAP Status* drop down box and select *Yes* or *No*.

Union Status – To search by union status, click on the *Union Status* drop down box and select *Yes* or *No*.

Temporary Layoff – To search by temporary layoff status, click on the *Temporary Layoff* drop down box and select *Yes* or *No*.

Return to Work DT – To search for individuals that have a return to work date equal to a specific date or range of dates, click on the *Return to Work DT* drop down box and select and option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Return to Work DT* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

Primary Language – To search by primary language, click on the *Primary Language 1* drop down box and select a language from the list provided. You can search for up to three primary languages by repeating this process for the additional primary language drop down boxes.

Veteran Status – To search by veteran status, click on the *Veteran Status* drop down box and select *Yes* or *No*.

Veteran Disabled – To search by veteran disabled status, click on the *Veteran Disabled Status* drop down box and select an option from the list provided.

Profile Score – To search for individuals that have a profile score equal to a specific score or range of scores, click on the *Profile Score* drop down box and select an option from the list provided. Type the score in the first space provided. If you selected *Between* from the *Profile Score* drop down box, you will need to type a score in the second space provided. This gives you the option of selecting a range of scores.

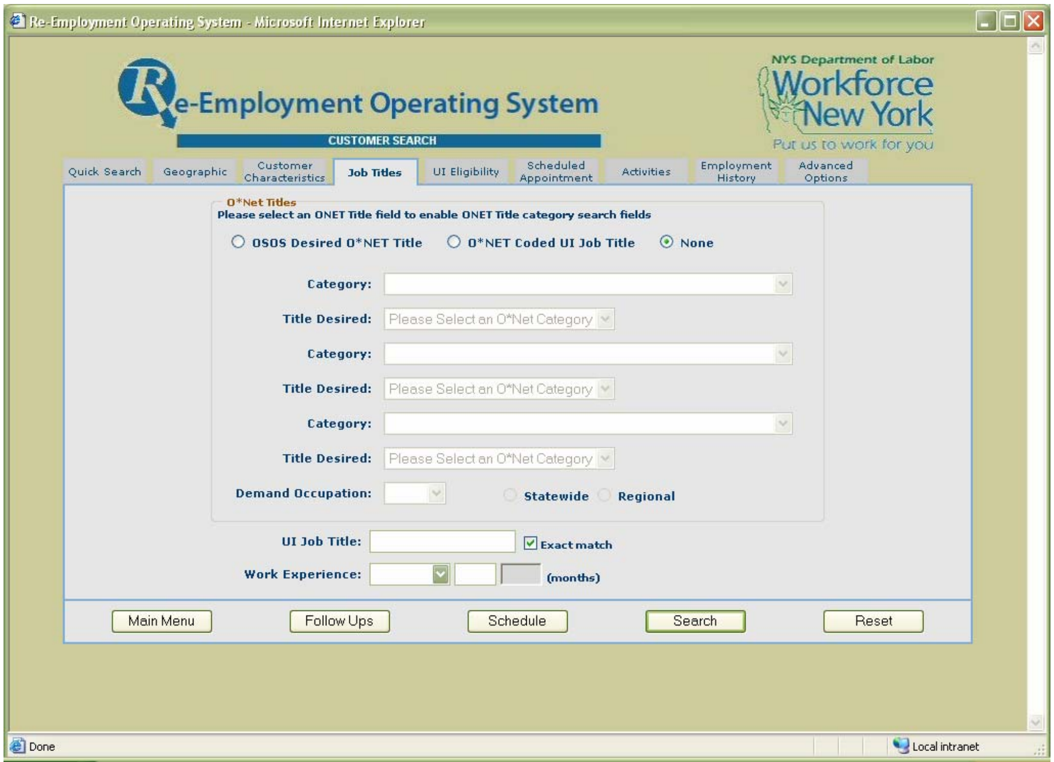
OSOS Record Status – To search by OSOS record status, click on the *OSOS Record Status* drop down box and select a status from the list provided.

OSOS Job Seeker Status – To search by OSOS job seeker status, click on the *OSOS Job Seeker Status* drop down box and select a status from the list provided.

Rapid Response – To search by rapid response status, click on the *Rapid Response* drop down box and select *Yes* or *No*.

Rapid Response Date – To search for individuals that have a rapid response date equal to a specific date or range of dates, click on the *Rapid Response Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Rapid Response Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

Job Titles



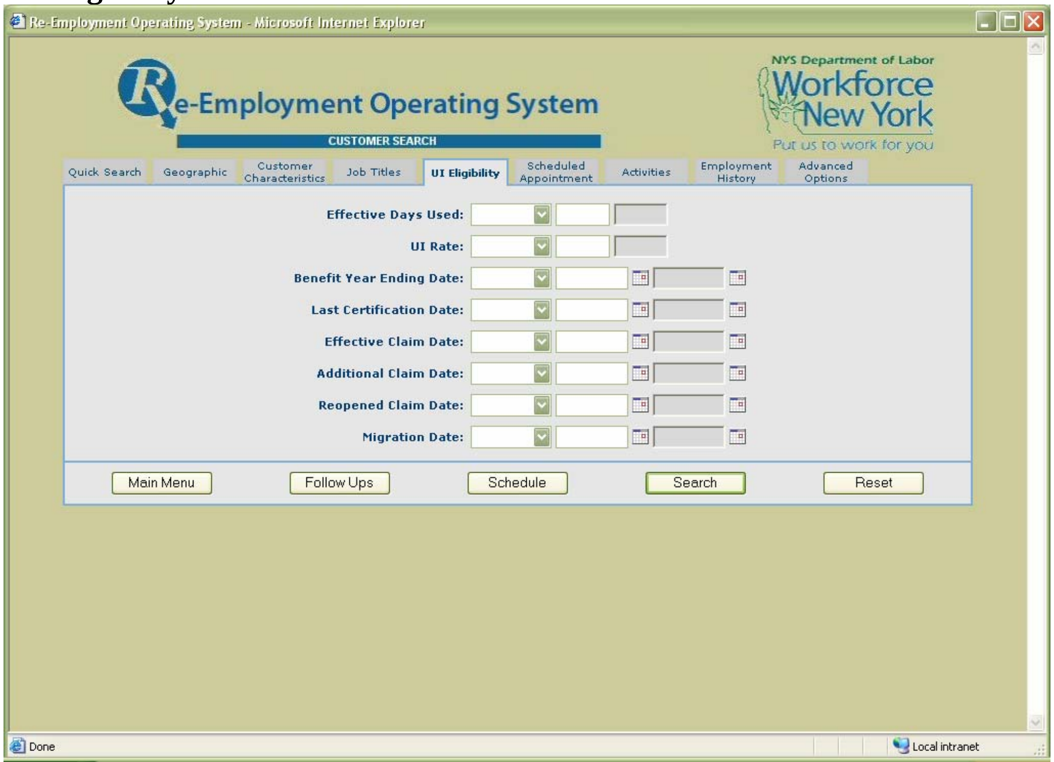
OSOS Desired O*NET Title – To search by the OSOS desired O*NET title, select the *OSOS Desired O*NET Title* option and click on the first *Category* drop down box and select a category from the list provided. Click on the *Title Desired* drop down box and select a title from the list provided. You can choose to search for up to three of the category and title combinations. You can choose to search for titles that are statewide or regional demand occupations by clicking on the *Demand Occupation* drop down box and selecting an option from the list provided. **Please note**: When searching by demand occupations, statewide is the default option. If you would like to search for regional demand occupations you need to select the *Regional* option before you begin your search.

O*NET Coded UI Job Title – To search by the O*NET coded UI job title, select the *O*NET Coded UI Job Title* option, click on the first *Category* drop down box and select a category from the list provided. Click on the *Title Desired* drop down box and select a title from the list provided. You can choose to search for up to three of the category and title combinations. You can choose to search for titles that are statewide or regional demand occupations by clicking on the *Demand Occupation* drop down box and selecting an option from the list provided. **Please note**: When searching by demand occupations statewide is the default option. If you would like to search for regional demand occupations, you need to select the *Regional* option before you begin your search.

UI Job Title – To search by the UI job title, type the title in the space provided next to *UI Job Title*. **Please note**: If you are not sure of the exact title name, you can search similar spellings by clicking on the box to the left of *Exact match*. This will remove the check mark from the box.

Work Experience – To search for individuals that have a specific number of months experience or range of experience, click on the *Work Experience* drop down box and select an option from the list provided. Type the number of months experience in the first space provided. If you selected *Between* from the *Work Experience* drop down box, you will need to type a number in the second space provided. This gives you the option of selecting a range of experience.

UI Eligibility



Effective Days Used – To search for individuals that have used a specific number of effective days or range of effective days, click on the *Effective Days Used* drop down box and select an option from the list provided. Type the number of effective days in the first space provided. If you selected *Between* from the *Effective Days Used* drop down box, you will need to type a number in the second space provided. This gives you the option of selecting a range of effective days used.

UI Rate – To search for individuals that have a specific UI benefit rate or range of UI benefit rates, click on the *UI Rate* drop down box and select an option from the list provided. Type the UI benefit rate in the first space provided. If you selected *Between* from the *UI Rate* drop down box, you will need to type another UI benefit rate in the second space provided. This gives you the option of selecting a range of UI benefit rates.

Benefit Year Ending Date – To search for individuals that have a benefit year ending date equal to a specific date or range of dates, click on the *Benefit Year Ending Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Benefit Year Ending Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

Last Certification Date – To search for individuals that have a last certification date equal to a specific date or range of dates, click on the *Last Certification Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Last Certification Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

Effective Claim Date – To search for individuals that have an effective claim date equal to a specific date or range of dates, click on the *Effective Claim Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Effective Claim Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

Additional Claim Date – To search for individuals that have an additional claim date equal to a specific date or range of dates, click on the *Additional Claim Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Additional Claim Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

Reopened Claim Date – To search for individuals that have a reopened claim date equal to a specific date or range of dates, click on the *Reopened Claim Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Reopened Claim Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

Migration Date – To search for individuals that have a migration date equal to a specific date or range of dates, click on the *Migration Date* drop down box and select an option from the list provided. Click on the *Calendar icon* ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Migration Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

Scheduled Appointment

Appointment Purpose – To search by appointment purpose, click on the *Appointment Purpose* drop down box and select an appointment purpose from the list provided.

Appointment Date – To search for individuals that have an appointment date equal to a specific date or range of dates, click on the *Appointment Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Appointment Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

Appointment Time – To search by appointment time, type the time of the appointment you are searching for in HH:MM format in the space provided next to *Appointment Time*, click the drop down box to the right and select *AM* or *PM*.

Appointment Location – To search by appointment location, click on the *Appointment Location* drop down box and select an appointment location from the list provided. **Please note**: This feature can not be used in combination with the *Geographic* tab. Therefore, when using this feature you will only be able to search for individuals with a reporting office equal to the office you are currently signed into.

Scheduled By – To search by the staff person who scheduled the appointment, click on the *Scheduled By* drop down box and select a staff person from the list provided.

Scheduled On – To search for individuals that had an appointment scheduled date equal to a specific date or range of dates, click on the *Scheduled On* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Scheduled On* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

Attended – To search by appointment attendance results, click on the *Attended* drop down box and select *Yes* (attended), *No* (did not attend) or *Neither* (no appointment result was recorded).

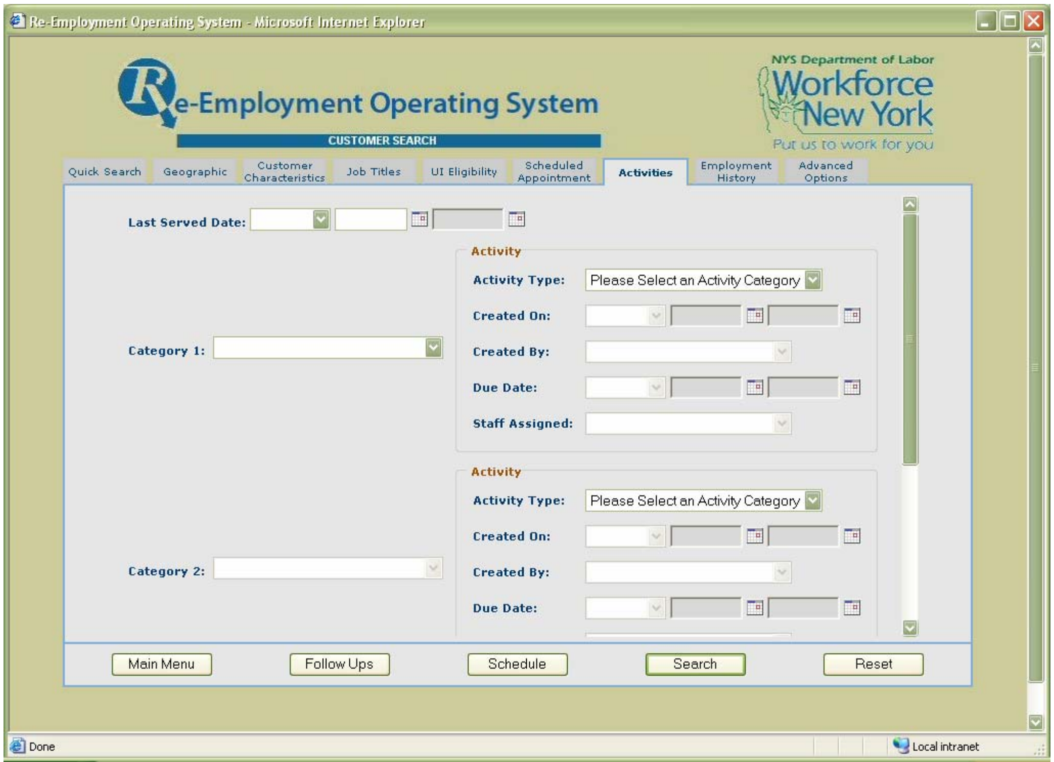
Reason Not Attended – To search by reason not attended, click on the *Reason Not Attended* drop down box and select a reason from the list provided.

Letter Type – To search by letter type, click on the *Letter Type* drop down box and select a letter type from the list provided. **Please note**: This feature can not be used in combination with the *Geographic* tab. Therefore, when using this feature you will only be able to search for individuals with a reporting office equal to the office you are currently signed into.

Letter Date – To search for individuals that have a letter date (date the appointment was scheduled) equal to a specific date or range of dates, click on the *Letter Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Letter Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.

RSO Status – To search by RSO status, click on the *RSO Status* drop down box and select an option from the list provided.

Activities



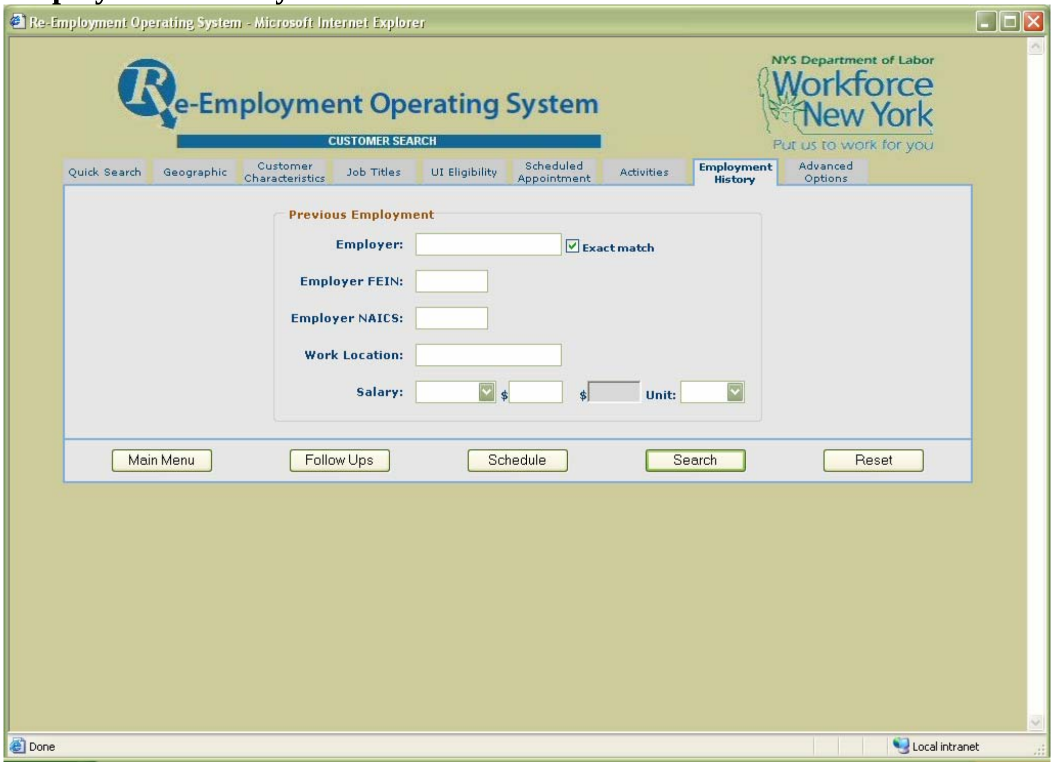
Last Served Date – To search for individuals that have a last served date (date of the individual's last service) equal to a specific date or range of dates, click on the *Last Served Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Last Served Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range. **Please note**: When searching by last served date you are limited to searching for individuals that are assigned to the office you are currently signed into and search date(s) within 90 days.

Category – To search by an activity category, click on the *Category 1* drop down box and select an activity category from the list provided. Once you have selected your category, complete the following fields or combination of fields, located to the right of the category you have selected:

- **Activity Type –** Click on the *Activity Type* drop down box and select an activity type from the list provided. **Please note**: Activity type is a required field when searching by category.
- **Created On –** Click on the *Created On* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Created On* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.
- **Created By –**Click on the *Created By* drop down box and select a staff person from the list provided.
- **Due Date –** Click on the *Due Date* drop down box and select an option from the list provided. Click on the *Calendar* icon ( ) next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Due Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range. **Please Note**: This option will only be available when the Follow Ups category is selected.
- **Staff Assigned –** Click on the *Staff Assigned* drop down box and select a staff person from the list

provided. **Please Note**: This option will only be available when the Follow Ups category is selected. You can search by up to three categories by repeating this process for each category selected.

Employment History



Employer – To search by employer name, type the employer name in the space provided next to *Employer*. **Please note**: If you are not sure of the exact name and spelling of the employer, you can search similar spellings by clicking on the box to the left of *Exact match*. This will remove the check mark from the box.

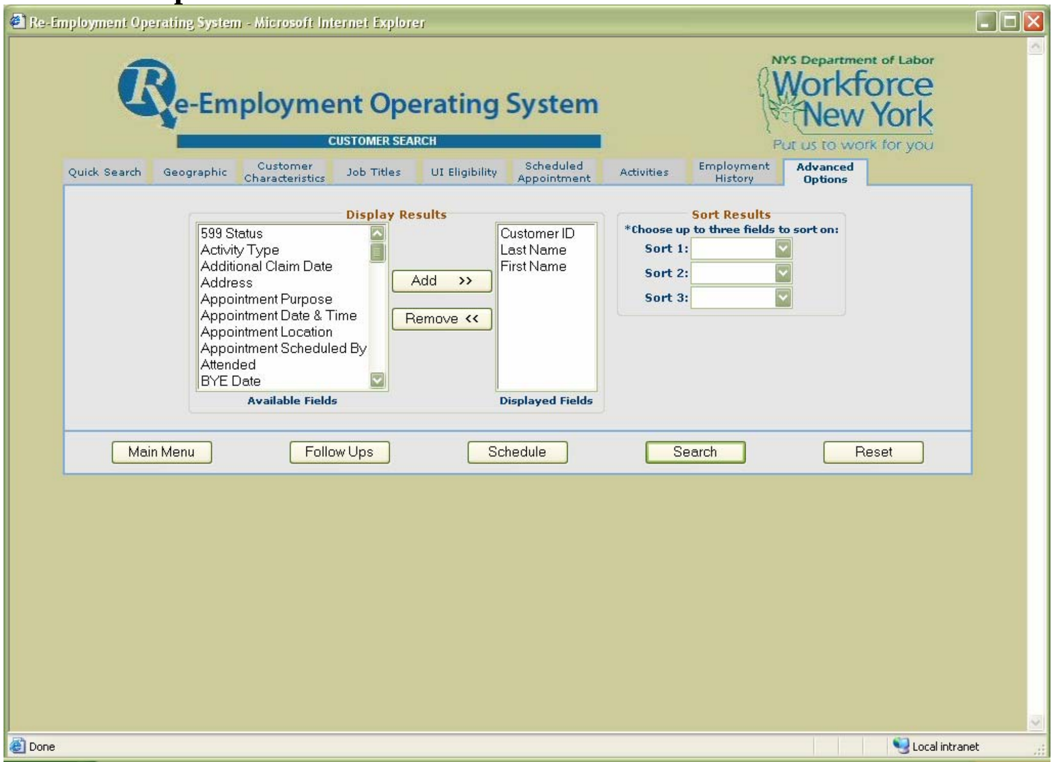
Employer FEIN – To search by the employer's FEIN number, type the FEIN in the space provided next to *Employer FEIN*.

Employer NAICS – To search by the employer's NAICS number, type the NAICS number in the space provided next to *Employer NAICS*.

Work Location – To search by the individual's work location, type the work location in the space provided next to *Work Location*.

Salary – To search for individuals that have a specific salary or range of salaries, click on the *Salary* drop down box and select an option from the list provided. Type the salary in the first space provided. If you selected *Between* from the *Salary* drop down box, you will need to type another salary amount in the second space provided. This gives you the option of selecting a range of salaries. Click on the *Unit* drop down box and select an option from the list provided

Advanced Options



This screen gives you the option of displaying additional fields to your search results and sorting your search results by up to three displayed fields. To add an available field(s), make a selection from the *Available Fields* list provided and click on the *Add* >> button. You can also remove a selection from the list of displayed fields by selecting the field you would like to remove from the *Displayed Fields* list provided and click on the << *Remove* button. **Please note**: You will need to repeat this process for each selection you would like displayed or removed. If you would like to sort your search results, click the *Sort 1* drop down box and select the field you would like to sort by from the list provided. You are able to sort by a maximum of three fields. To sort by more that one field, you will need to repeat this process for *Sort 2* and *Sort 3*.

Important Information: In any of the previous screens described in this section you have the following options:

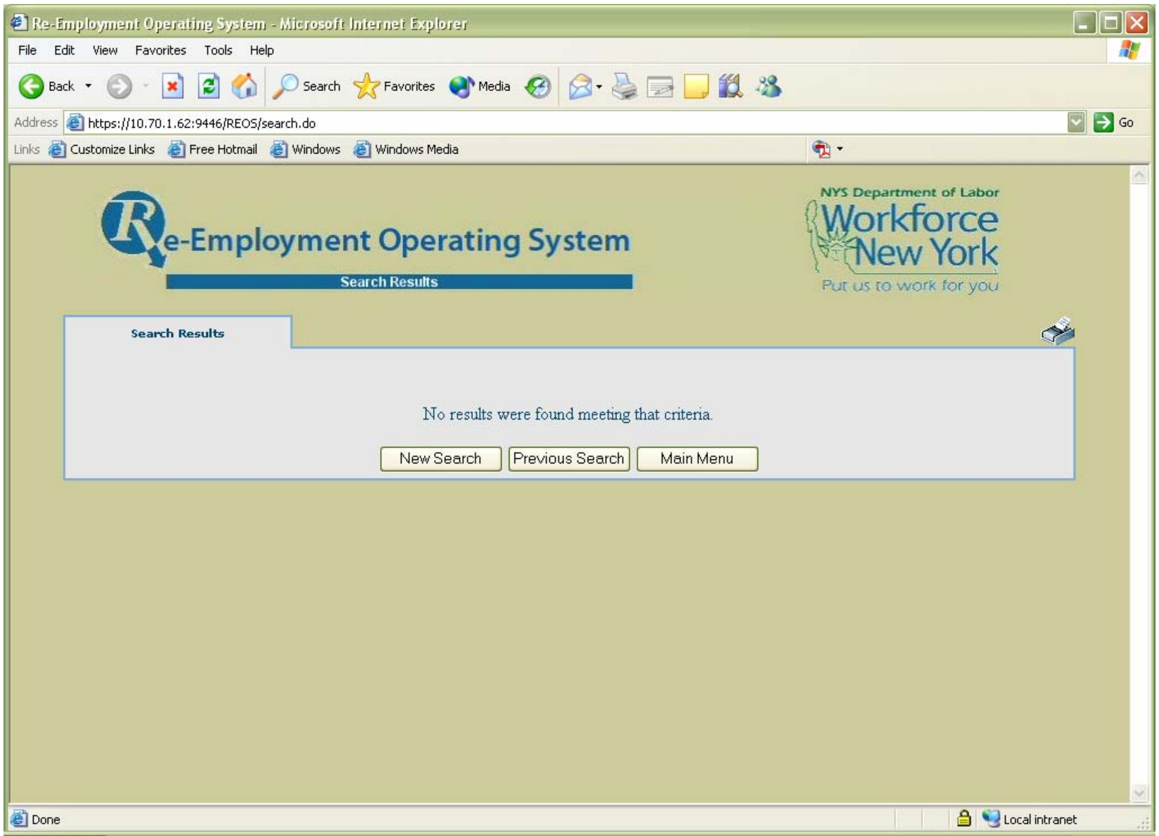
Main Menu - This selection will bring you back to the *Main Menu*.

Follow Ups – This selection will bring you to the *Follow Up* screen (Please refer to Section 12, Page 1).

Schedule – This selection will bring you to the *Scheduling Menu*.

Search – This selection will begin your search. Once your search has finished running, one of the following will appear:

- The screen below will appear stating that no results were found meeting the criteria.



You can do the following from this screen:

a. **New Search** – This selection will return you to the *Quick Search* tab of the *Search* screen and will remove the criteria you previously entered.
b. **Previous Search** – This selection will return you to the *Quick Search* tab of the *Search* screen and will still show the search criteria you previously entered.
c. **Main Menu** – This selection will return you to the *Main Menu*.

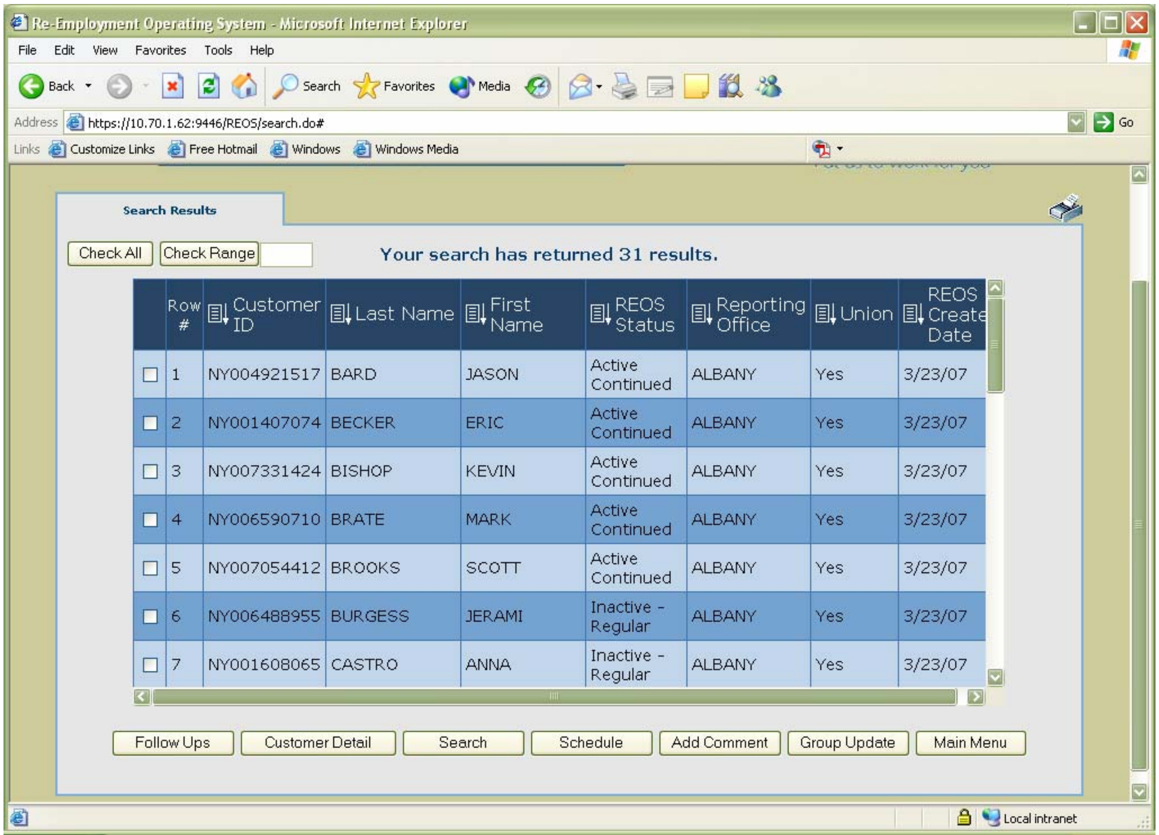
- If only one record meets the criteria you entered the *Customer Detail Record* will appear (Please refer to Section 4, Page 1).
- If multiple records meet the criteria you entered the *Search Results* screen will appear (Please refer to Section 3, Page 13).

Reset – This selection will remove all search criteria you have entered from all of the search screen tabs.

Search Results

The search criteria used to create the search results screen below is as follows:

- REOS Status = ALL CUSTOMERS
- Reporting Office 1 = ALBANY
- Union Status = Yes
- REOS Create Date = 03/23/2007



Above the list of individuals, the system will indicate exactly how many customer records will be referenced in this particular screen.

In the above screen you have the following options:

Check All – This selection will place a check mark in the first column for all of the individual(s) listed and the button name will change to *Uncheck All*. **Please note**: If you click on the *Uncheck All* button, you will remove all of the check marks in the first column for the individual(s) listed.

Check Range – This selection allows you to place check marks in the first column for a range of consecutive individuals. For example, if you would like to place a check mark in the first column for the third, fourth and fifth individuals listed, you would type 3-5 in the space provided next to the *Check Range* button and click the *Check Range* button.

Please note: You must use *Check All*, *Check Range*, or select an individual by placing a check mark in the box provided in the first column before clicking on any of the buttons listed below (with the exception of the *Previous*, *Refresh* and *Main Menu* buttons).

Follow Ups – This selection allows you to create or view follow ups for an individual(s) you have selected (Please refer to Section 12, Page 1).

Customer Detail – This selection will bring you to the first *Customer Detail* record. To advance to the next *Customer Detail* record, click on the *Next* arrow located in lower right hand corner of your screen. To return to the previous *Customer Detail* record, click on the *Prev* arrow also located in lower right hand corner of your screen. Please refer to Section 4, Page 1.

Search – This allows you to create a new search by clicking on the *Search* button and selecting *New Search* or return to your previous search by clicking on *Previous Search*.

Schedule – This selection will initiate the scheduling process. Once you have clicked on the *Schedule* button, you must click on *Group* or *Individual*. The *Group Scheduling* or *Individual Scheduling* screen will now appear depending on your selection. Please refer to Section 7.

Add Comment – This selection allows you to add a comment to an individual(s) record(s) (Please refer to Section 6, Page 1).

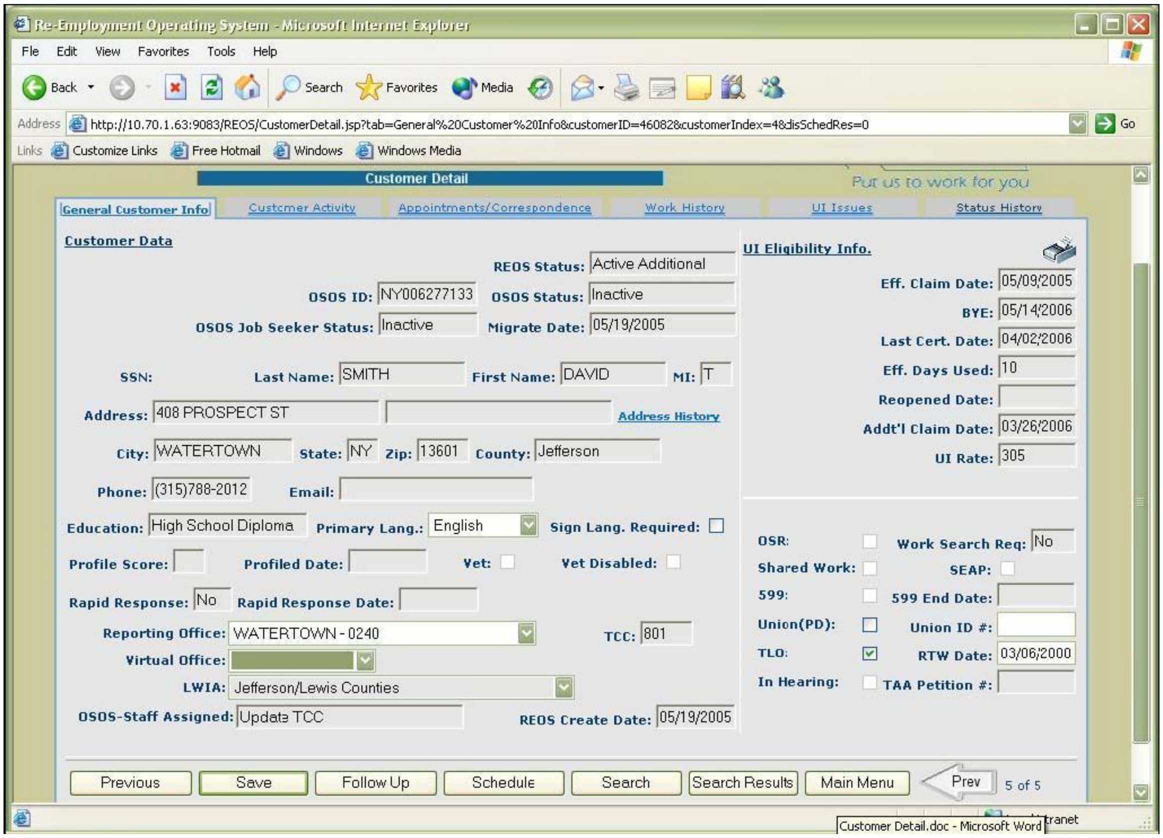
Group Update – This selection allows you to update multiple records at the same time. Please refer to Section 5, Page 1.

Main Menu – This selection will bring you back to the *Main Menu*.

Customer Detail

The customer detail record consists of six tabs; General Customer Info, Customer Activity, Appointments/Correspondence, Work History, UI Issues and Status History. **Please note**: To navigate between tabs, click on the tab heading.

General Customer Info

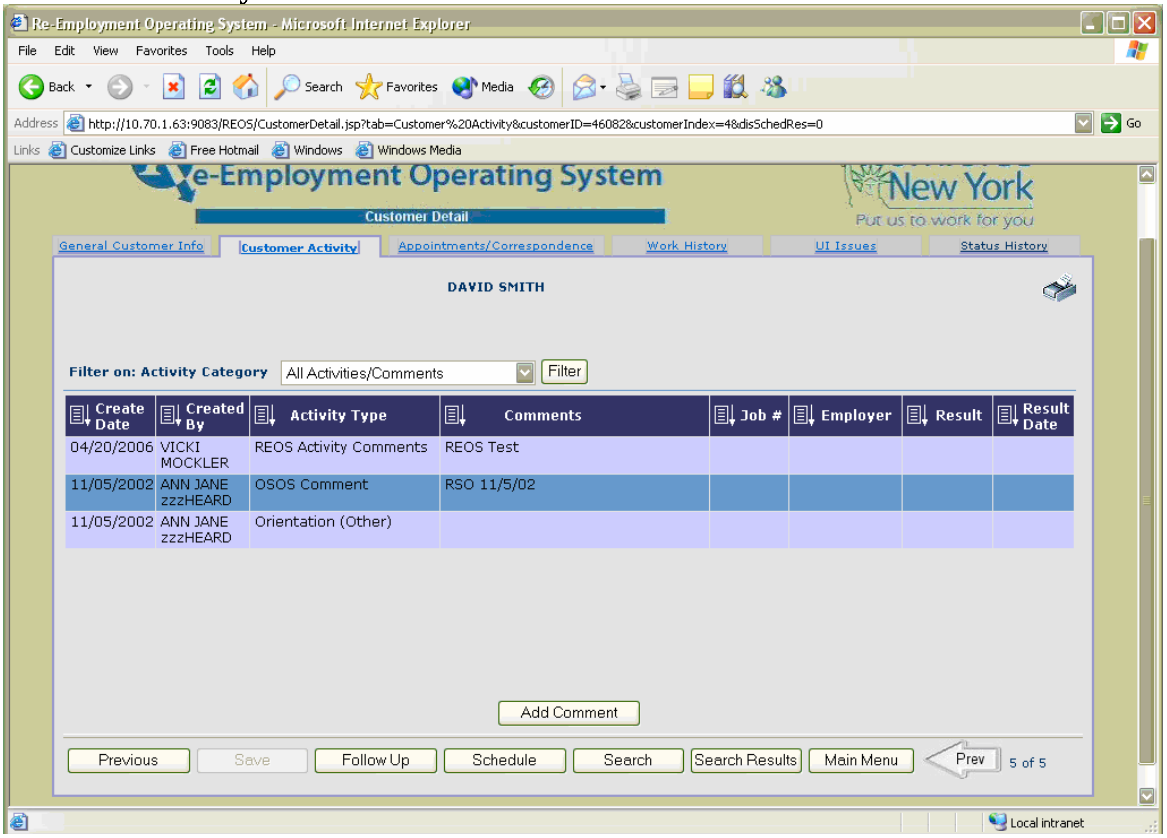


This screen displays specific information for an individual, including information related to their current UI claim. You can also view the individual's previous addresses by clicking on the *Address History* link located next to the *Address* field. The following fields can be updated from this screen:

- To update the primary language, click on the *Primary Lang.* drop down box and select a language from the list provided.
- To update the sign language required indicator, click on the box next to *Sign Lang. Required*.
- To update the reporting office, click on the *Reporting Office* drop down box and select an office from the list provided.
- To update the virtual office, click on the *Virtual Office* drop down box and select an office from the list provided.
- To update the union status field, click on the box next to *Union(PD)*.
- To update the union ID number, type the ID number in the space provided next to *Union ID#*.
- To update the TLO status, click on the box next to *TLO*.
- To update the return to work date, type the date in the box provided next to *RTW Date* in the following format: MM/DD/YYYY.

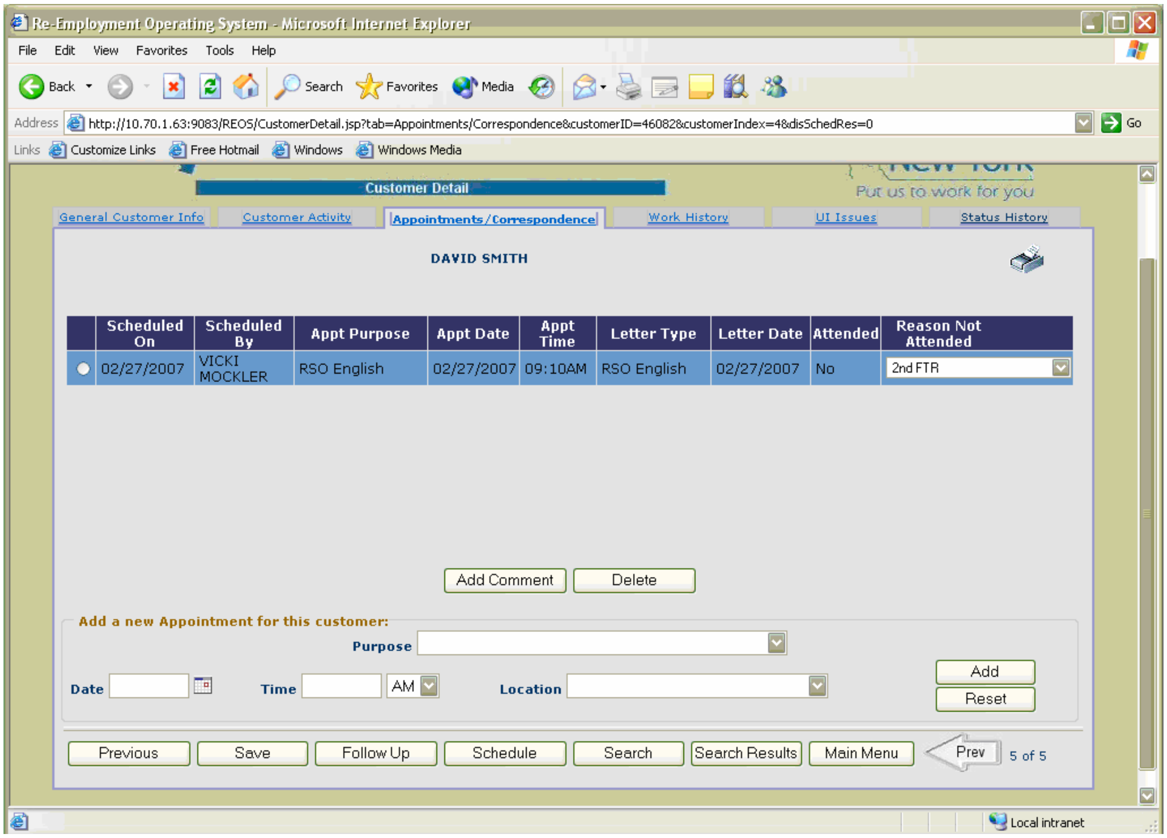
The following fields can be updated from OSOS: *Last Name*, *First Name*, *MI*, *Address*, *City*, *State*, *Zip*, *County*, *Phone*, *Email*, *Vet*, *Vet Disabled*, *LWIA* and *OSOS-Staff Assigned*. **Please note**: Information updated in the OSOS system will not appear in REOS until the day after the changes are made in OSOS.

Customer Activity

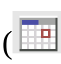


This screen will display REOS comments, OSOS comments and OSOS activities related to the individual. From this screen you have the option of filtering by category. To filter by category, click on the *Filter on: Activity Category* drop down box, select a category from the list provided (i.e., All Comments) and click the *Filter* button. You can also add a comment for the individual from this screen by clicking on the *Add Comment* button (Please refer to Section 6, Page 1).

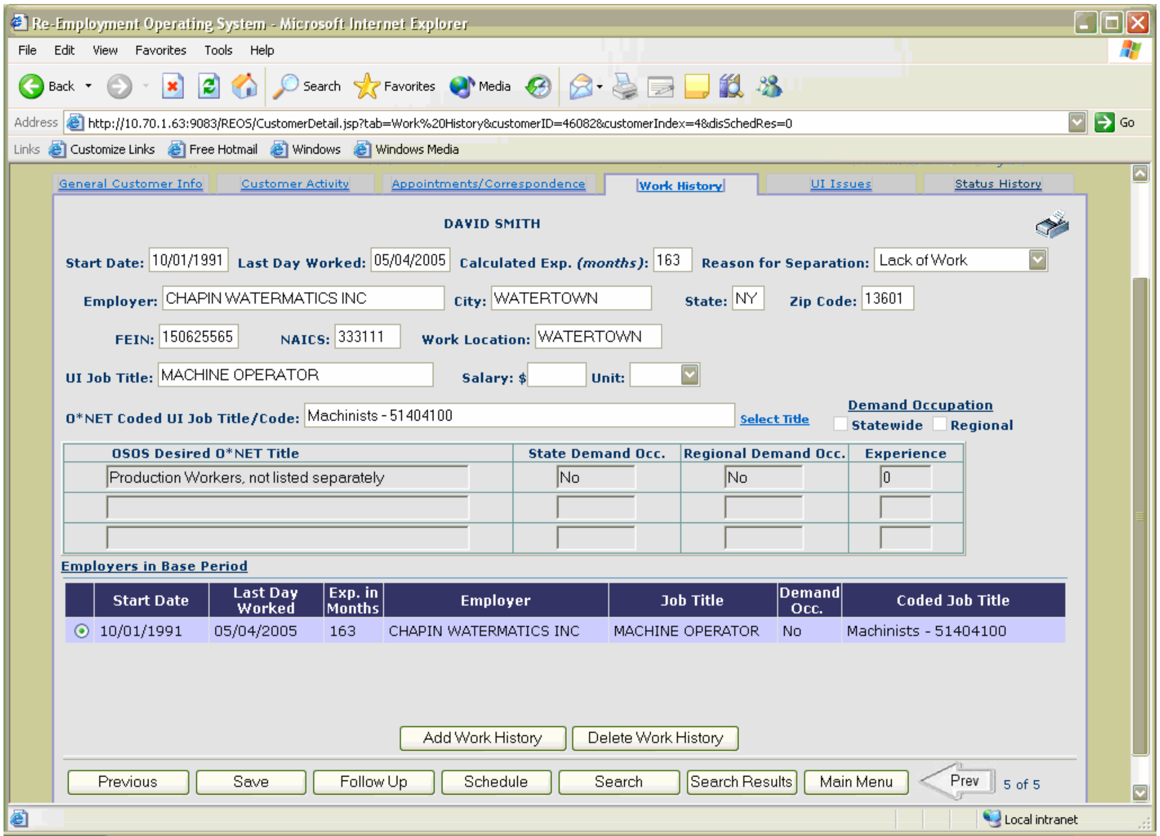
Appointments/Correspondence



This screen displays any appointments or correspondence related to the individual. From this screen you can do the following:

1. Record appointment attendance results (Please refer to Section 10, Page 1).
2. Add a comment by clicking on the *Add Comment* button (Please refer to Section 6, Page 1).
3. Delete an entry from the list of appointments and correspondence by selecting the appointment you would like to remove and click on the *Delete* button.
4. Schedule an appointment without a letter from this screen by following the steps below:
   - Click on the *Purpose* drop down box and select the appropriate appointment purpose from the list provided.
   - Click on the *Calendar* icon () to the right of the space provided next to *Date* and select the date for the appointment you are scheduling from the calendar that appears.
   - Type the time of the appointment you are scheduling in the following format: HH:MM in the space provided next to *Time*; click the drop down box to the right and select *AM* or *PM*.
   - Click on the *Location* drop down box and select a location from the list provided.
   - Click on the *Add* button to add the appointment to the list of appointments and correspondence or click on the *Reset* button to remove the information you selected in the steps above.

Work History



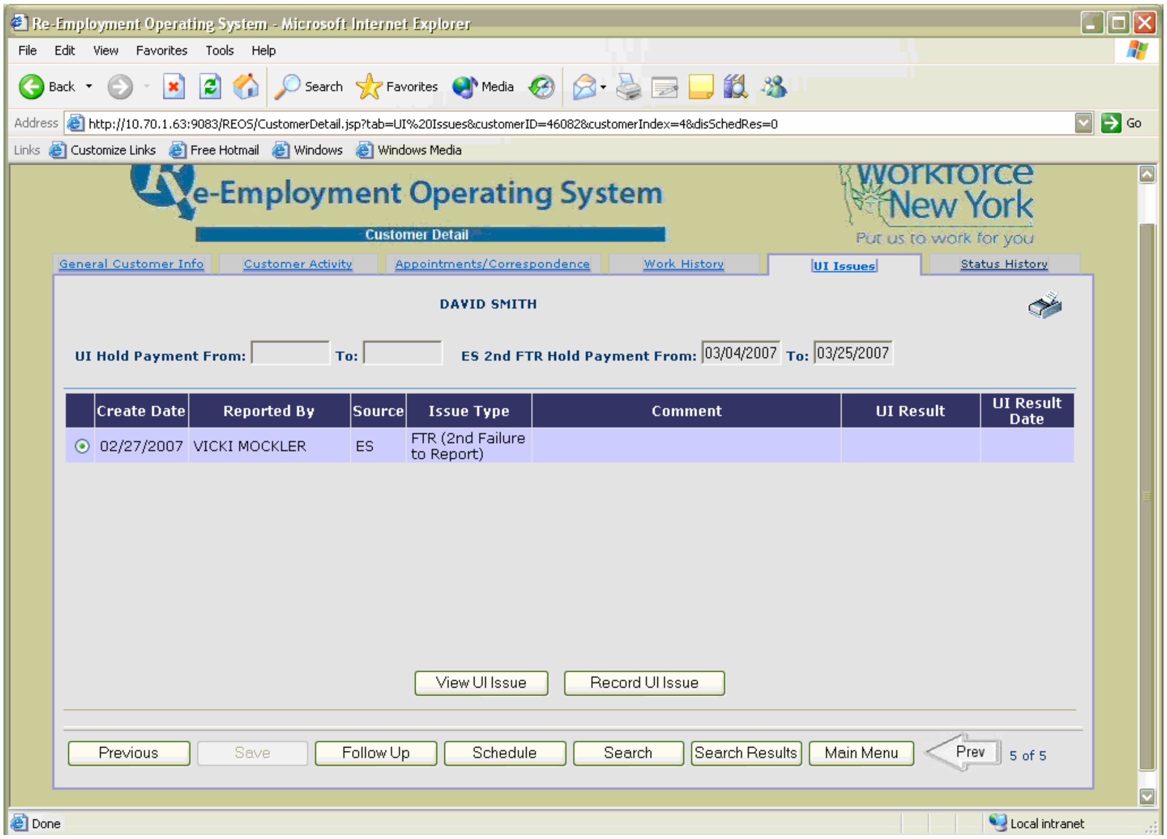
This screen displays information about the individual's previous employer(s) and their previous work history. From this screen you can do the following:

1. Update the following fields: *Start Date*, *Last Day Worked*, *Reason for Separation*, *Employer*, *City*, *State*, *Zip Code*, *FEIN*, *NAICS*, *Work Location*, *UI Job Title*, *Salary*, *Unit* and *O*NET Coded UI Job Title/Code*. To change any of the fields listed with the exception of *Reason for Separation*, *Unit*, and *O*NET Coded UI Job Title/Code*, type the changes in space provided and click the *Save* button. To change reason for separation or unit, click the drop down box and select an option from the list provided. To change the O*NET coded UI job title and code, click on the *Select Title* link to the right of the space provided and select an option from the screen that appears.
2. Add work history by clicking on the *Add Work History* button. The *Create Work History* screen should now appear. Type the start date (MM/DD/YYYY) in the space provided next to *Start Date*; type the date the individual last worked (MM/DD/YYYY) in the space provided next to *Last Day Worked*; click on the *Reason for Separation* drop down box and select a reason from the list provided; type the employer name in the space provided next to *Employer*; type the employer's city in the space provided next to *City*; type the employer's state in the space provided next to *State*; type the employer's zip code in the space provided next to *Zip Code*; type the employer's FEIN number in the space provide next to *FEIN*; type the employer's NAICS number in the space provide next to *NAICS*; type the individual's work location in the space provided next to *Work Location*; type the individual's UI job title in the space provide next to *UI Job Title*; type the individual's salary in the space provide next to *Salary*; click on the *Unit* drop down box and select an option from the list provided; and click on the *Select Title* link to the right of the space provided for O*NET coded UI job title and code and select an option from the screen that appears. At this point you can do one of the following:
   - Click on the *Save* button. This will return you to the *Work History* tab and the work history you created will now appear in the *Employers in Base Period* list.
   - Click on the *Reset* button to remove all updates you have entered without updating the individual's record.

- Click on the Cancel button to remove all of the information you have entered without updating the individual's record and this will bring you back to the *Work History* tab.

3. Delete a work history by selecting the work history you would like to remove and click on the *Delete Work History* button.

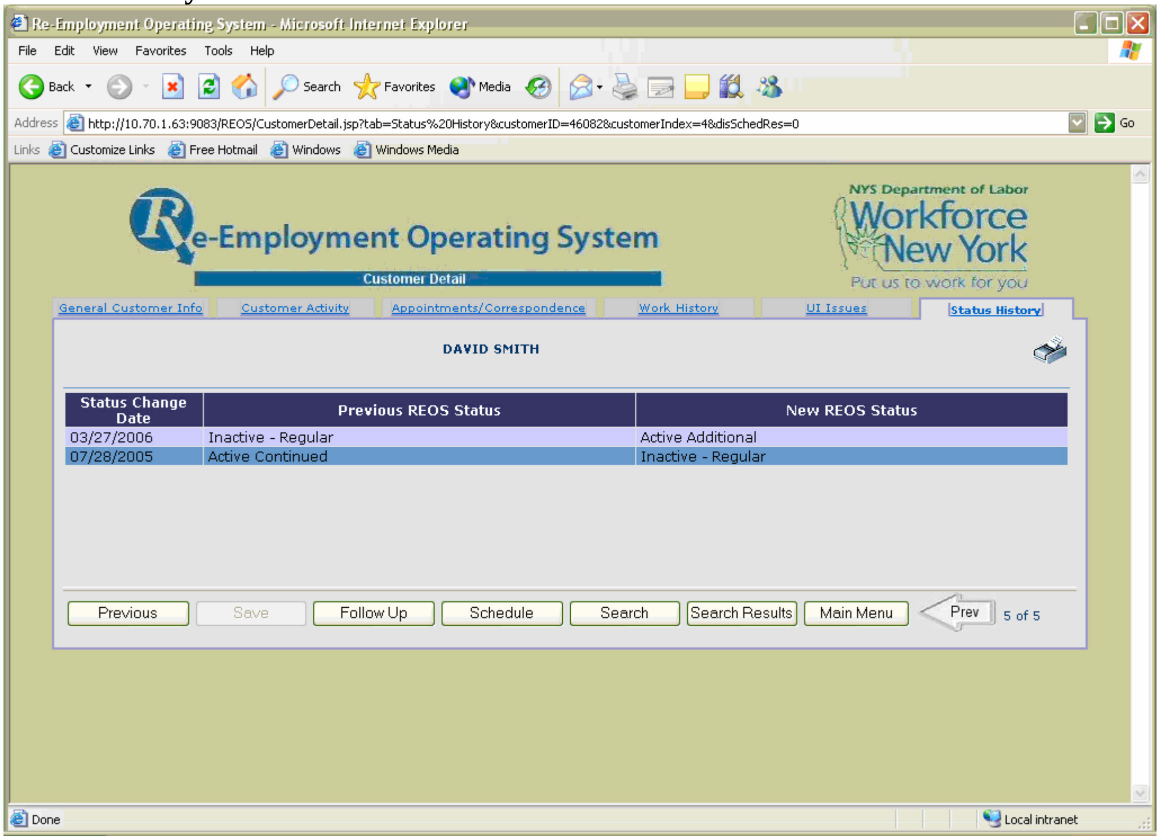
UI Issues



This screen displays any issues that were reported to the UI Division through REOS, as well as the hold payment dates, when applicable. From this screen you can do the following:

1. View an issue that was previously reported for the individual by selecting the issue you would like to view and clicking on the *View UI Issue* button.
2. Record an issue for the individual by clicking on the *Record UI Issue* button (Please refer to Section 11, Page 1).

Status History



This screen displays any previous REOS statuses for the individual with the date the status was changed, previous REOS status and the new REOS status.

Important Information: In any of the previous screens described in this section, you have the following options:

Previous – This selection allows you to return to the previous screen.

Save – This selection allows you to save any changes you have made. **Please note**: This button is only available on the *General Customer Info*, *Appointments/Correspondence* and *Work History* tabs.

Follow Up – This selection allows you to create or view a follow up for the individual (Please refer to Section 12, Page 1). **Please note**: The view follow up option will only be available if the individual currently has a follow up created.

Schedule – This selection allows you to schedule the individual for an appointment with a letter by clicking on the *Schedule* button. The *Group Scheduling* screen will now appear. (Please refer to Section 7, Page 6).

Search – This selection allows you to create a new search or go back to your previous search by clicking on the *Search* button and clicking *New Search* or *Previous Search*. If you selected *New Search*, the system will bring you the search screens so you may create a new search. If you selected *Previous Search*, the system will bring you back to the search screens and will still display any search criterion you had selected.

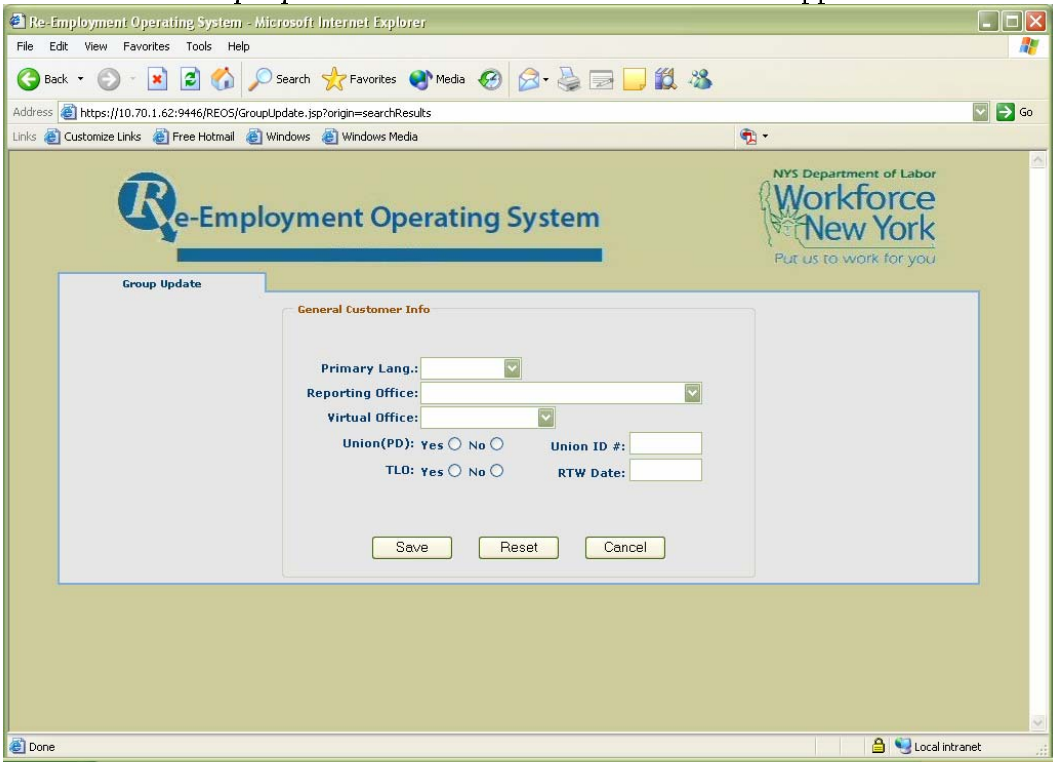
Search Results – This button will only be available if you accessed the customer detail record by searching for more that one individual.

Main Menu - This selection will bring you back to the *Main Menu*.

Group Update

Please note: The *Group Update* option can only be initiated from the *Search Results* screen (Please refer to Section 3, Page 13) or the *RSO Pool* (Please refer to Section 7, Page 9).

1. Click on the *Group Update* button and the screen below will appear.



2. At this point you have the option of updating the Primary Language, Reporting Office, Virtual Office, Union, Union ID#, TLO and RTW Date for the customers you selected on the previous screen. **Please note**: You may change individual or multiple options at this time. See below for instructions to update any of these options:
   - To update the primary language, click on the *Primary Lang.* drop down box and select a language from the list provided.
   - To update the reporting office, click on the *Reporting Office* drop down box and select an office from the list provided.
   - To update the virtual office, click on the *Virtual Office* drop down box and select an office from the list provided.
   - To update the union status, click on *Yes* or *No* in the space provided next to *Union (PD).*
   - To update the union ID number, type the ID number in the space provided next to *Union ID#.*
   - To update the TLO status, click on *Yes* or *No* in the space provided next to *TLO*.
   - To update the return to work date, type the date in the box provided next to *RTW Date* in the following format: MM/DD/YYYY.

3. Once you have made the necessary updates, you can click on one of the following buttons:

   Save – This selection will update all of the individuals you selected with the new information you entered on this screen and will bring you back to the screen you initiated group updating from. **Please note**: Once you are back to the screen you initiated group updating from, you will need to click on the *Refresh* button; otherwise the updated information will not be displayed.

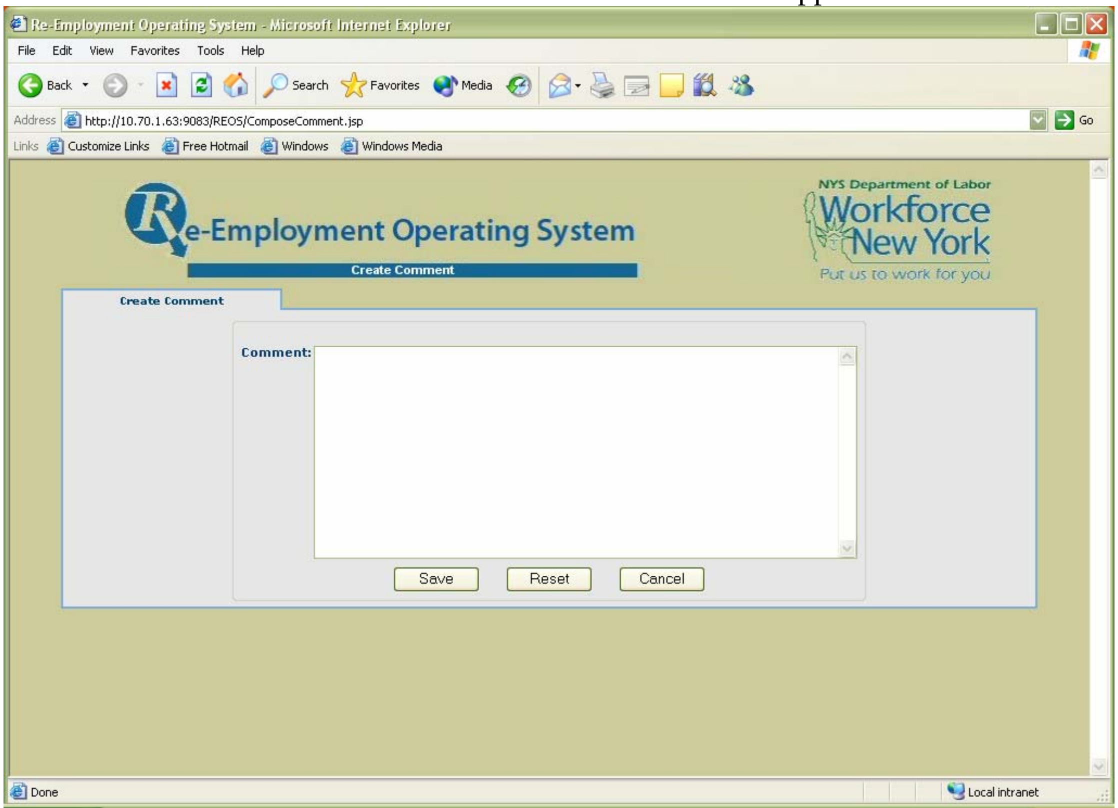
   Reset – This selection will remove all updates you have entered without updating the individual(s) record(s).

   Cancel – This selection will remove all updates you have entered without updating the individual(s) record(s) and will bring you back to the screen you initiated group updating from.

Comments

Please note: Comments can only be initiated from the *Search Results* screen (Please refer to Section 3, Page 13), *Customer Detail* Record (Please refer to Section 4, Page 1) or *Record Appointment Results* screen (Please refer to Section 10, Page 2).

1. Click on the *Add Comment* button and the screen below will appear.



3. Type your comment in the space provided and click on one of the following buttons:

   Save – This selection will add the comment for the individual(s) you selected and will bring you back to the screen you initiated the comment from.

   Reset – This selection will remove any text you have entered without saving the comment.

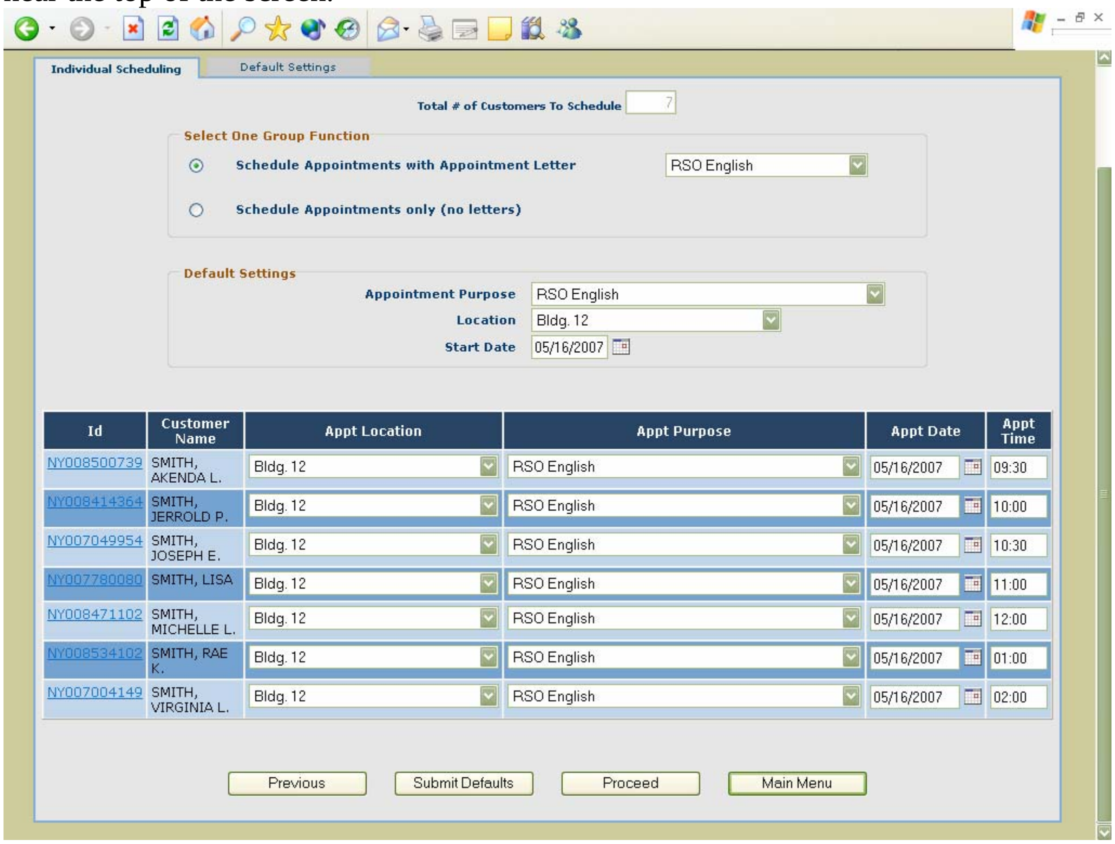
   Cancel – This selection will remove any text you have entered without saving the comment and will bring you back to the screen you initiated the comment from.

Please note: Comments should be as short as possible because the system will only allow comments to be two thousand (2,000) characters or less. Comments entered can be viewed by any person with access to REOS. Therefore, please make sure you use appropriate language only. Do not use profanity or derogatory statements when creating comments.

Individual Scheduling

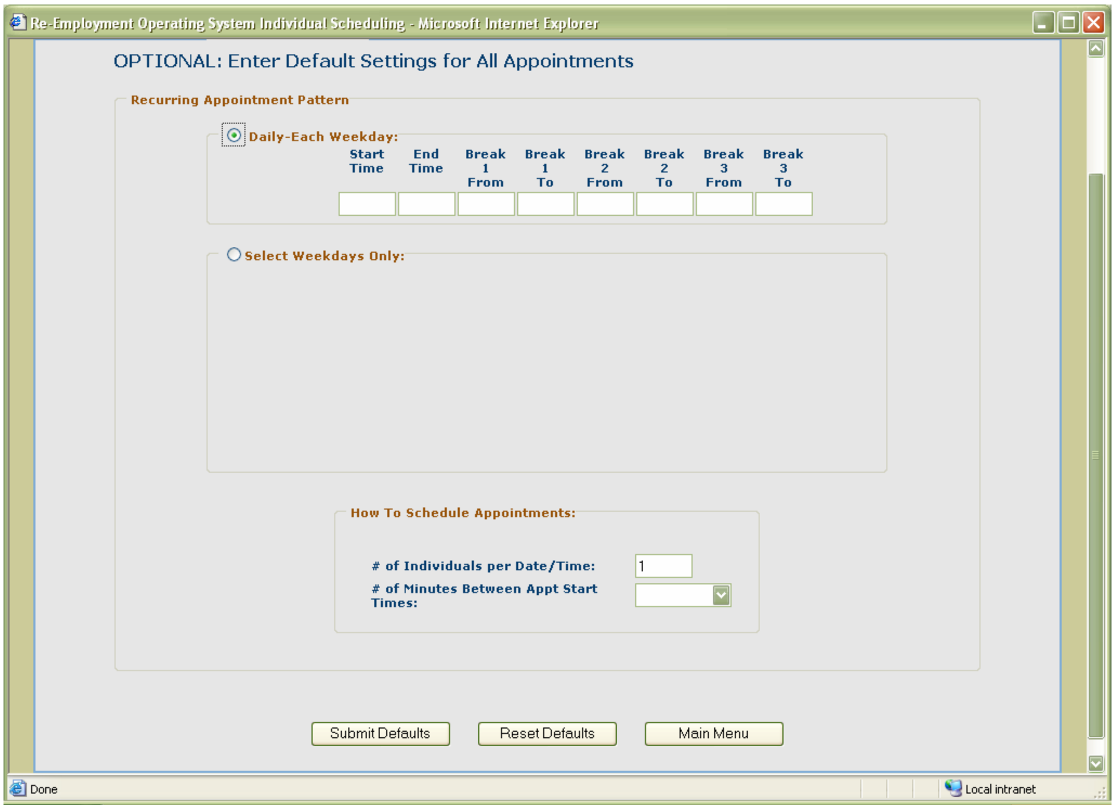
Please note: The individual scheduling option can be initiated from the Search Results screen (Please refer to Section 3, Page 13), Record Appointment Results screen (Please refer to Section 10, Page 2), RSO Pool (Please refer to Section 7, Page 9) or the Reschedule Pool (Please refer to Section 7, Page 12).

1. Click on the *Schedule* button and click on *Individual* from any of the screens mentioned above. The screen below will appear. The individual scheduling screen consists of two tabs *Individual Scheduling* and *Default Settings*. To navigate between tabs click on the tab heading. **Please note**: The number of individuals you are about to schedule will appear in the *Total # of Customers To Schedule* box located near the top of the screen.



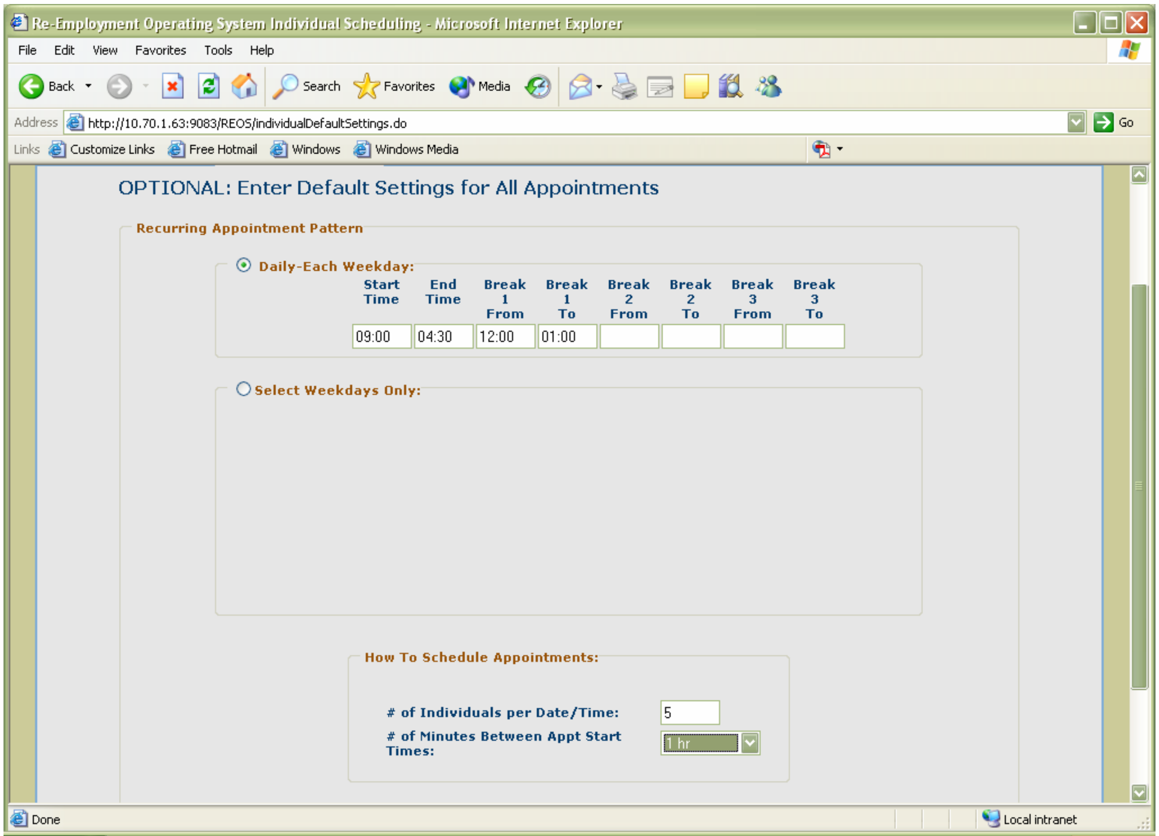
2. At this point you have the following options:
   - To schedule appointments with an appointment letter select *Schedule Appointments with Appointment Letter* from the *Select One Group Function* section, click on the drop down to the right and select a letter type from the list provided.
   - To schedule appointments with out appointment letters select *Schedule Appointments only (no letters)* from the Select *One Group Function* section.

3. You can now set default settings for each individual by clicking on the *Appointment Purpose* drop down box from the *Default Settings* section of this screen and selecting an appointment purpose from the list provided, click on the *Location* drop down box and select a location from the list provided, and click on the *Calendar* icon () to the right of the space provided next to *Start Date* and select the date you would like the appointment(s) you are scheduling to start on from the calendar that appears. Click on the *Submit Defaults* button. This will populate the *Appt Location*, *Appointment Purpose* and *Appt Date* fields for each individual listed. **Please note**: Any combination of these three fields can be filled in; you do not have to complete all three fields. In order for the *Default Settings* tab to work, the *Start Date* field must be filled in. You can also set default appointment date and times by clicking on the *Default Settings* tab. The screen below will appear.

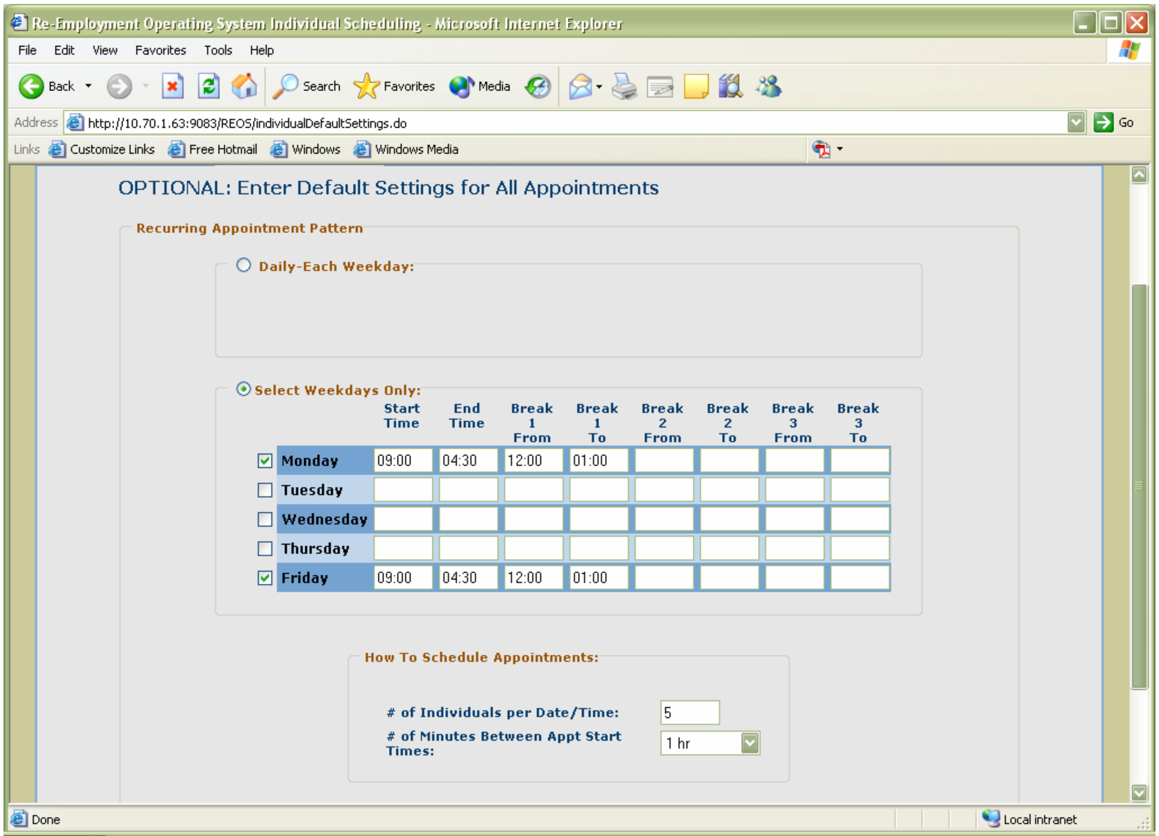


You have the option of selecting one of the following:

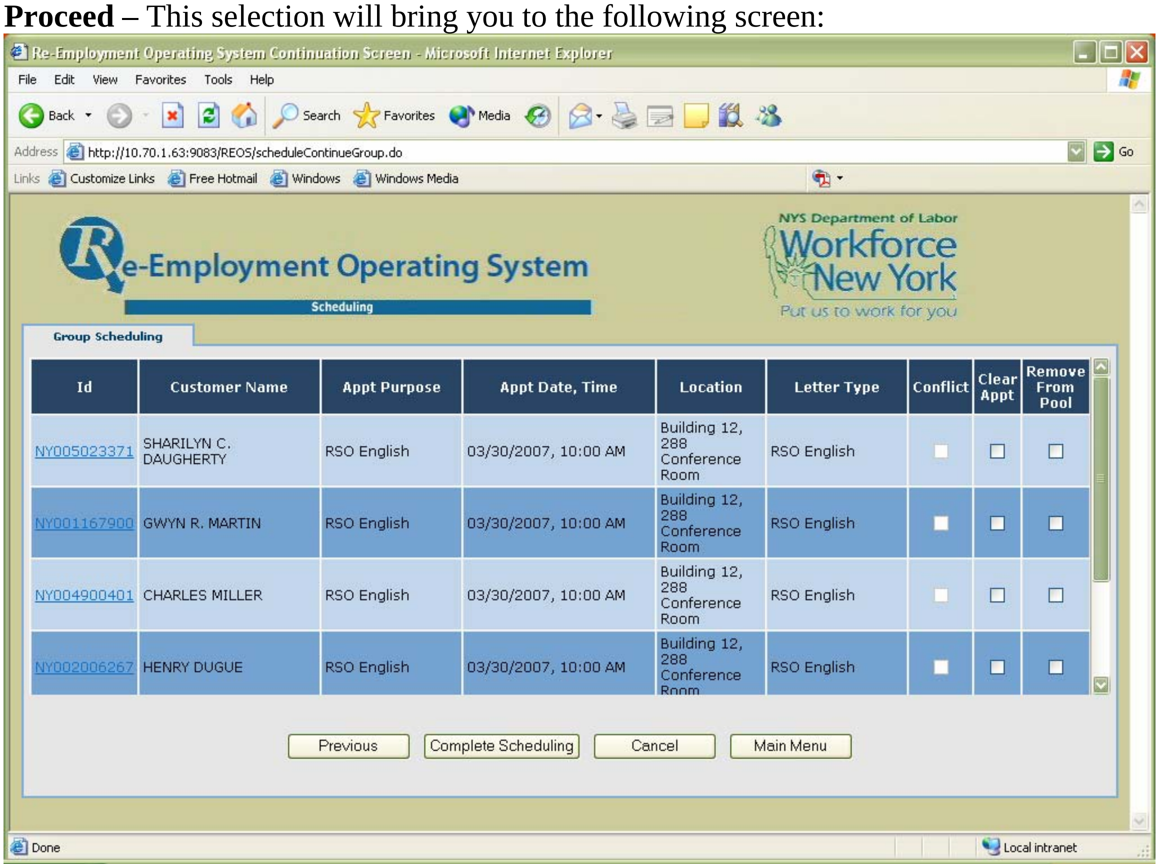
- Select the *Daily-Each Weekday* option from the *Recurring Appointment Pattern* section. This selection will allow you to set default appointments that recur each weekday at the same time(s) each day. Once you have entered your start, end and break times, type the number of individuals you would like to schedule for each date and time combination in the space provided next to *# of Individuals per Date/Time*, click on the *# of Minutes Between Appt Start Times* drop down box and select the number of minutes between appointment start times. At this point you can click on the *Submit Defaults* button to submit the defaults you have entered, and you will be returned to the *Individual Scheduling* tab; click on the *Reset Defaults* button to clear all of the defaults you have entered; or click on the *Main Menu* button to cancel scheduling and return to the *Main Menu*. For example, if your office schedules five (5) individuals per appointment date and time combination, with the appointments beginning at 9:00 a.m., with the last appointment ending at 4:30 p.m., with a lunch break from 12:00 p.m. to 1:00 p.m. each weekday, and each appointment lasting one hour, your screen should look like the screenshot below.



- Select the *Select Weekdays Only* option from the *Recurring Appointment Pattern* section. This selection will allow you to set default appointments that recur on selected weekdays at the same time(s) each week. Once you have entered your start, end and break times for each selected weekday, type the number of individuals you would like to schedule for each date and time combination in the space provided next to *# of Individuals per Date/Time*, click on the *# of Minutes Between Appt Start Times* drop down box and select the number of minutes between appointment start times. At this point you can click on the *Submit Defaults* button to submit the defaults you have entered, and you will be returned to the *Individual Scheduling* tab; click on the *Reset Defaults* button to clear all of the defaults you have entered; or click on the *Main Menu* button to cancel scheduling and return to the *Main Menu*. For example, if your office schedules five (5) individuals per appointment date and time combination, with the appointments beginning at 9:00 a.m., with the last appointment ending at 4:30 p.m., with a lunch break from 12:00 p.m. to 1:00 p.m. on Mondays and Fridays only, with each appointment lasting one hour, your screen should look like the screenshot below.

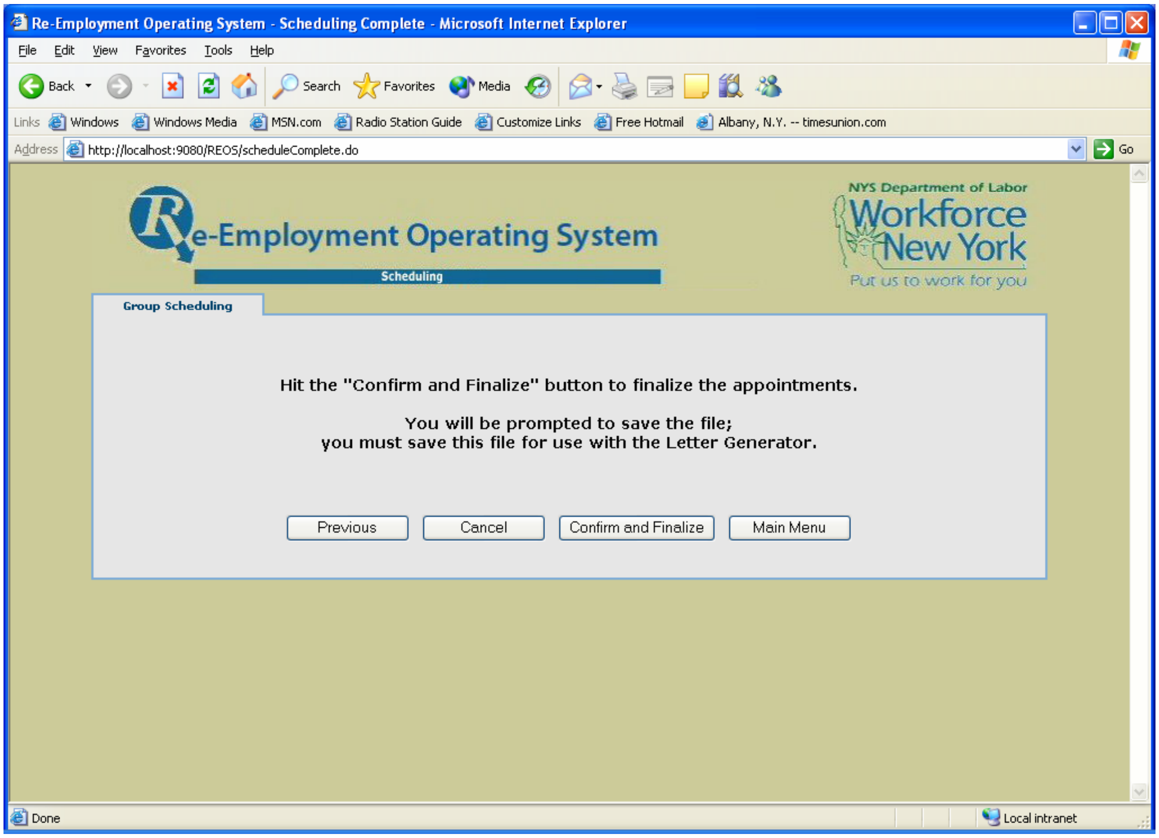


4. At this point you should notice that each individual should now have the appointment location, purpose, date and time completed. **Please note**: If necessary you can overwrite any of the default values at this time. You can now select one of the following buttons:
   - **Previous** – This selection will return you to the previous screen.
   - **Proceed** – This selection will bring you to the following screen:



This screen will display a list of the individuals you are scheduling. The ID (if you click on an ID you will be directed to that individual's customer detail record), name, appointment purpose, appointment date and time, appointment location, letter type and whether a conflict exists will be displayed for each individual. **Please note**: If there is a check mark in the *Conflict* column for an individual, it means that this individual has another appointment scheduled for the same date. If you place a check mark in the *Clear Appt* column, the individual will not be scheduled. If you place a check mark in the *Remove From Pool* column this individual will not be scheduled and will be removed from the pool. **Please note**: The *Remove From Pool* column will only appear if scheduling was initiated from the RSO or Reschedule pools.

At this point you can click on the *Previous* button which will bring you back to the previous screen; click on the *Complete Scheduling* button located near the bottom of your screen and the *Confirm and Finalize* screen will now appear as shown in the screenshot below; or click on the *Cancel* button which will cancel the scheduling process and return you to the *Scheduling Menu*; or click on the *Main Menu* button to return to the *Main Menu*.



You can choose from the following options from the *Confirm and Finalize* screen:

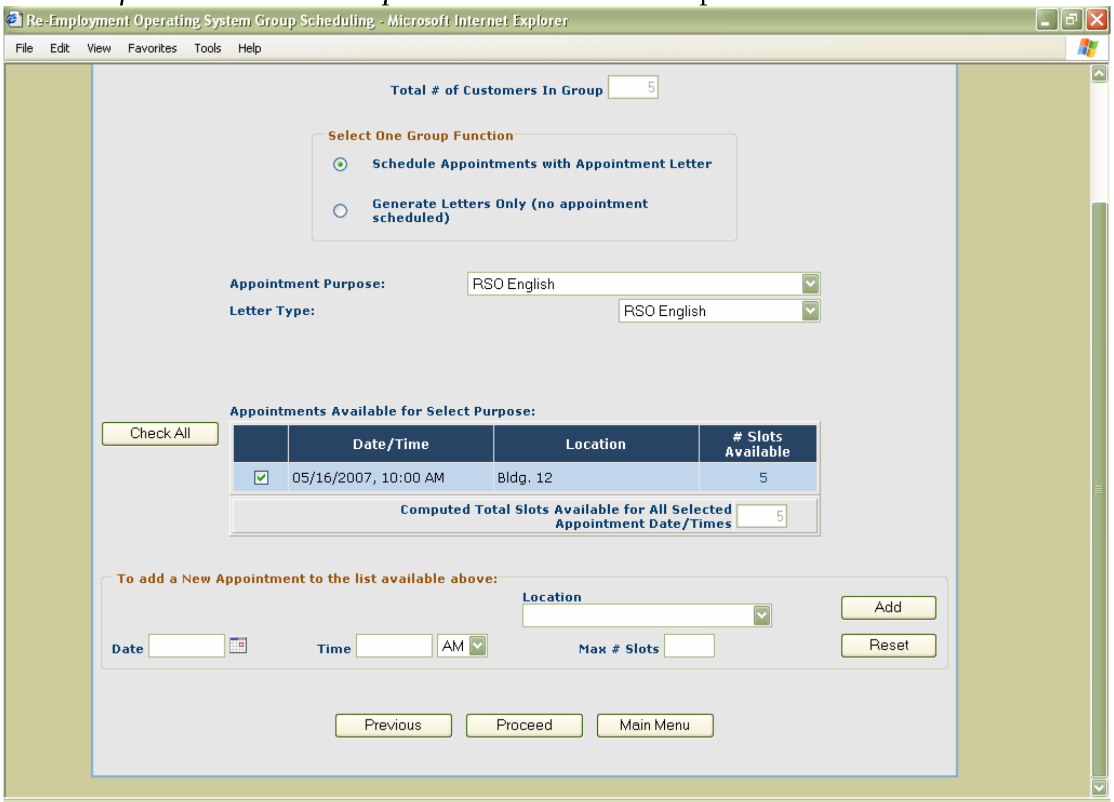
a. **Previous** – This selection will return you to the previous screen.
b. **Cancel** – This selection will return you to the *Main Menu* without generating the letter(s) or scheduling the appointment(s).
c. **Confirm and Finalize** – This selection will begin the process of saving your data file and printing your letters. At this point please refer to Section 8, Page 1.
d. **Main Menu** – This selection will cancel the scheduling process and return you to the *Main Menu*.

- **Main Menu** – This selection will cancel the scheduling process and return you to the *Main Menu*.

Group Scheduling

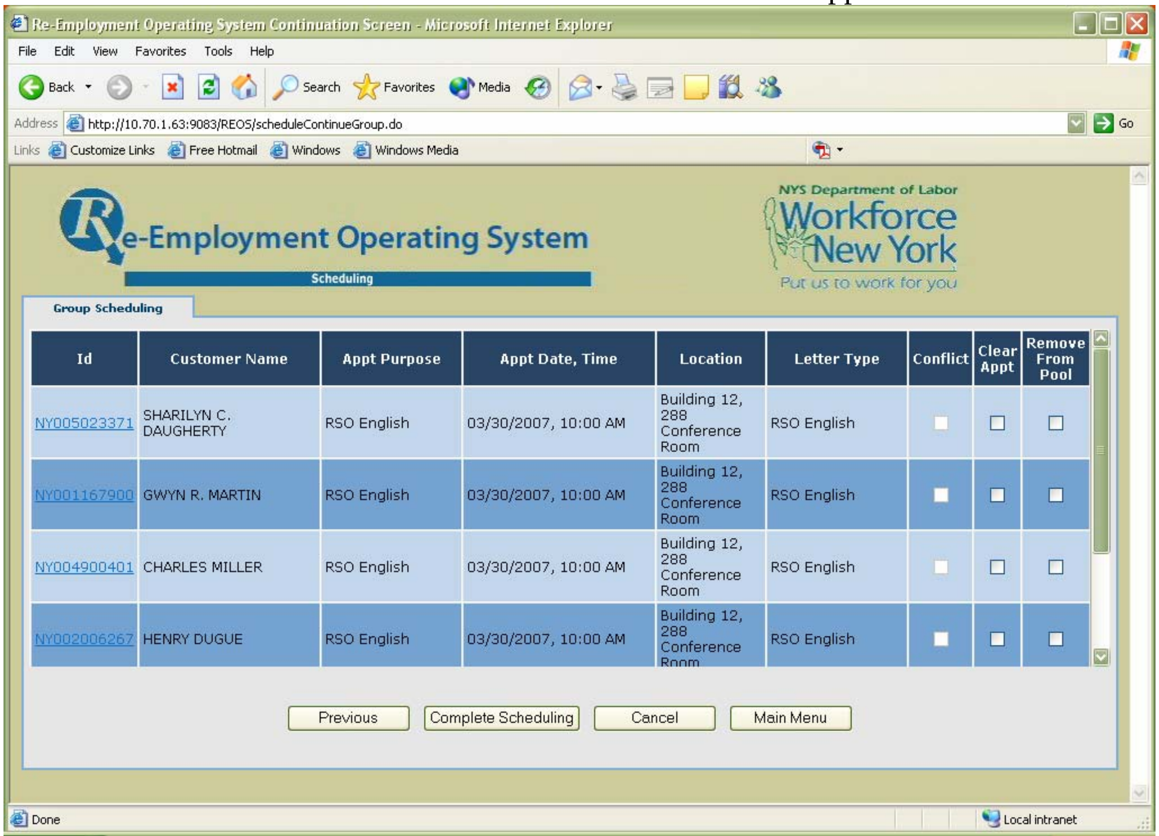
Please note: The group scheduling option can be initiated from the Customer Detail Record (Please refer to Section 4, Page 1), Search Results screen (Please refer to Section 3, Page 13), Record Appointment Results screen (Please refer to Section 10, Page 2), RSO Pool (Please refer to Section 7, Page 9) or the Reschedule Pool (Please refer to Section 7, Page 12).

1. Click on the *Schedule* button and click on *Group* from any of the screens mentioned above. The screen below will appear. **Please note**: The number of individuals you are about to schedule will appear in the *Total # of Customers In Group* box located near the top of the screen.



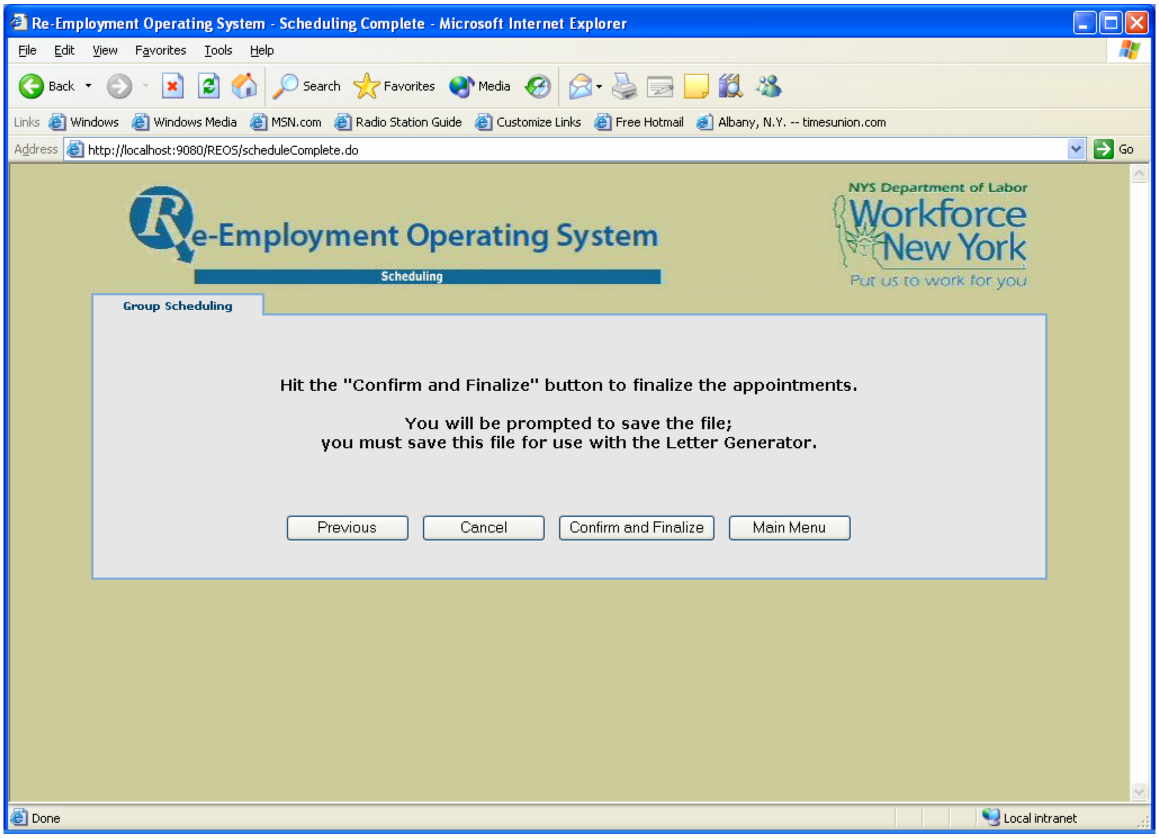
2. At this point you have the following options:
   - To schedule appointments with an appointment letter, select *Schedule Appointments with Appointment Letter* from the *Select One Group Function* section. Click on the *Appointment Purpose* drop down box and select a purpose from the list provided. Click on the *Letter Type* drop down box and select a letter from the list provided. All available appointments with the appointment purpose you selected will now be displayed in the *Appointments Available for Select Purpose* section. If there are no available appointments, you can add an appointment by clicking on the *Location* drop down box located in the *To add a New Appointment to the list available above* section of your screen and select a location from the list provided. Click on the *Calendar* icon () to the right of the space provided next to *Date* and select the date for the appointment(s) you are scheduling from the calendar that appears. Type the time of the appointment you are scheduling in the following format: HH:MM in the space provided next to *Time*. Click the drop down box to the right and select *AM* or *PM*. Type the maximum number of individuals that could be scheduled for this appointment. Click on the *Add* button to add the appointment to the list of available appointments or click on the *Reset* button to remove the information you selected. **Please note**: The system will not allow you to create an appointment if the date or time is in the past.

     Select the appointment you would like to schedule the individual(s) for from the *Appointments Available for Select Purpose* section by clicking on the box in the first column next to the appointment(s). You can select all of the appointments available by clicking on the *Check All* button. Click on the *Proceed* button and the screen below will appear:



This screen will display a list of the individuals you are scheduling. The ID (if you click on an ID you will be directed to that individual's customer detail record), name, appointment purpose, appointment date and time, appointment location, letter type and whether a conflict exists will be displayed for each individual. **Please note**: If there is a check mark in the *Conflict* column for an individual, it means that this individual has another appointment scheduled for the same date. If you place a check mark in the *Clear Appt* column, the individual will not be scheduled. If you place a check mark in the *Remove From Pool* column this individual will not be scheduled and will be removed from the pool. **Please note**: The *Remove From Pool* column will only appear if scheduling was initiated from the RSO or Reschedule pools. Click on the *Complete Scheduling* button located near the bottom of your screen. The *Confirm and Finalize* screen will now appear as shown in the screenshot below.

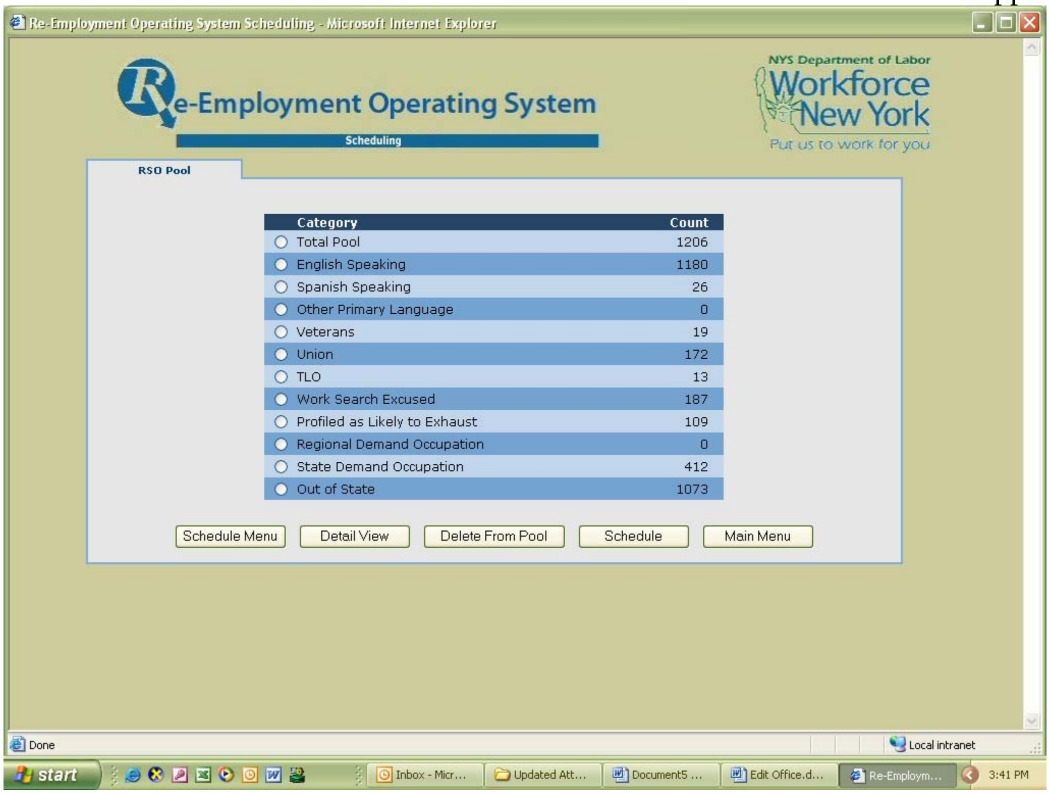
- To generate letters without an appointment, select *Generate Letters Only (no appointment scheduled)* from the *Select One Group Function* section. Click on the *Letter Type* drop down box and select a letter from the list provided. Click on the *Proceed* button located near the bottom of your screen. The *Confirm and Finalize* screen will now appear as shown in the screenshot below. **Please note**: If you initiated scheduling from the *RSO Pool* you will not be able to select *Generate Letters Only (no appointment scheduled).*



3. You can choose from the following options:
   - **Previous** – This selection will return you to the previous screen.
   - **Cancel** – This selection will return you to the *Main Menu* without generating the letter(s) or scheduling the appointment(s).
   - **Confirm and Finalize** – This selection will begin the process of saving your data file and printing your letters. At this point please refer to Section 8, Page 1.
   - **Main Menu** – This selection will return you to the *Main Menu*.

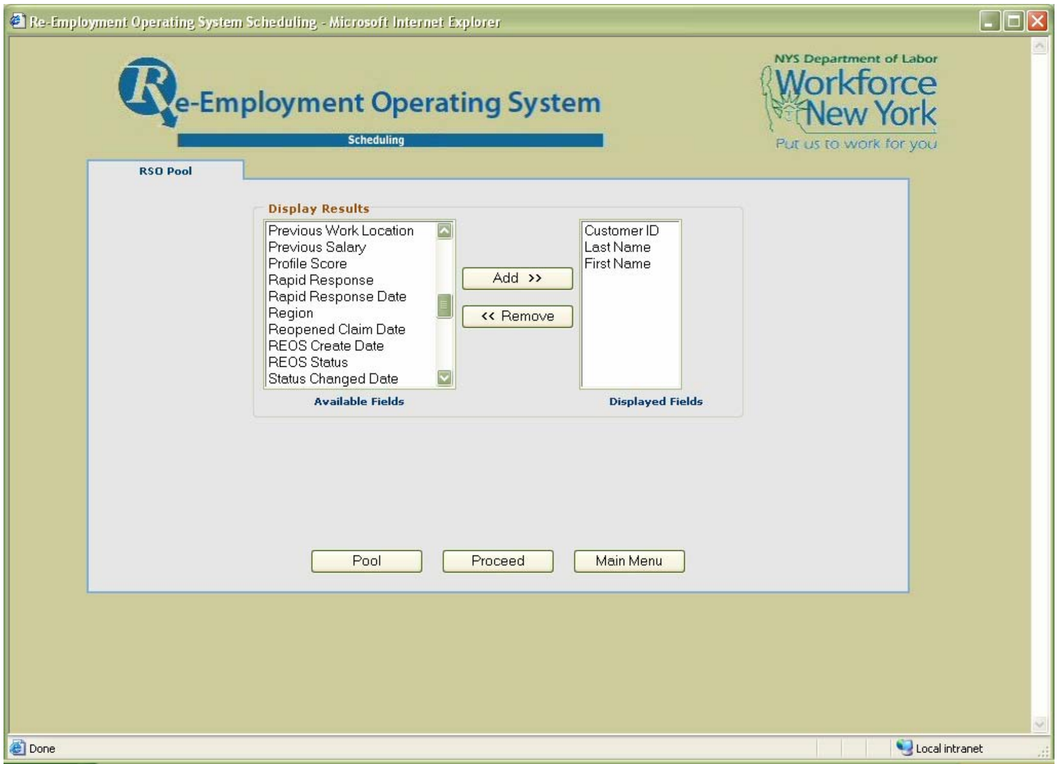
RSO Pool

1. Click on the *Schedule* button from *Main Menu.*
2. Click on the *Pools* button from *Scheduling Menu.*
3. Click on the *RSO Pool* button from the *Pools Menu*. The screen below will appear.

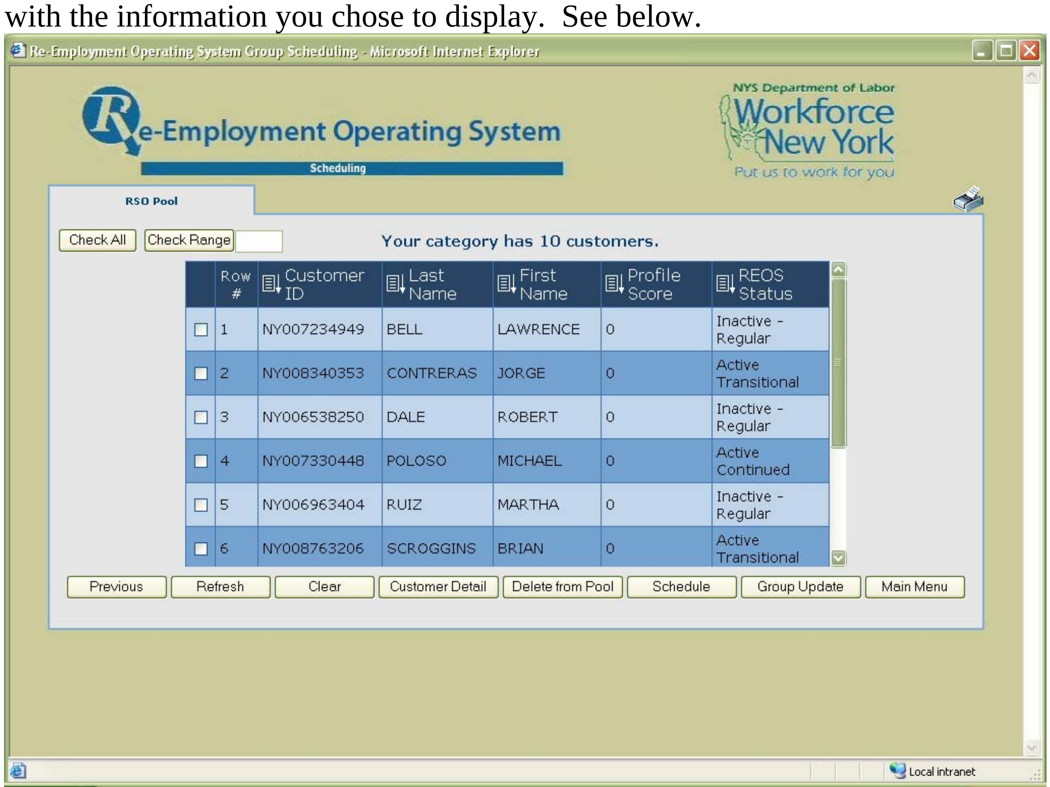


Please note: An individual can be included in multiple categories.

4. Click on the button next to the category you would like to schedule/view and do one of the following:
   - Click on the *Schedule* button and click on *Group* or *Individual*. The *Group Scheduling* or *Individual Scheduling* screen will now appear depending on your selection on the previous screen. Please refer to Section 7.
   - Click on the *Detail View* button and the screen below should appear.



At this point you make the selection(s) of information you want to be displayed before scheduling individuals (i.e., Profile Score, REOS Status, etc.). To add an available field(s), make a selection from the *Available Fields* list provided and click on the *Add* >> button. You can also remove a selection from the list of displayed fields by selecting the field you would like to remove from the *Displayed Fields* list provided and click on the << *Remove* button. **Please note**: You will need to repeat this process for each selection you would like displayed or removed. Click on the *Proceed* button. The individual(s) from the category you selected at the beginning of this step should appear with the information you chose to display. See below.



Above the list of individuals, the system will indicate exactly how many customer records will be referenced in this particular screen.

In the above screen you have the following options:

Check All – This selection will place a check mark in the first column for all of the individual(s) listed and the button name will change to *Uncheck All*. **Please note**: If you click on the *Uncheck All* button, you will remove all of the check marks in the first column for the individual(s) listed.

Check Range – This selection allows you to place check marks in the first column for a range of consecutive individuals. For example, if you would like to place a check mark in the first column for the third, fourth and fifth individuals listed, you would type 3-5 in the space provided next to the *Check Range* button and click the *Check Range* button.

Please note: You must use *Check All*, *Check Range*, or select an individual by placing a check mark in the box provided in the first column before clicking on any of the buttons listed below (with the exception of the *Previous, Refresh* and *Main Menu* buttons).

Previous – This selection will bring you back to the previous screen.

Refresh – This selection will refresh your screen by removing all check marks in the first column.

Clear – This selection allows you to remove individuals from the list without deleting them from the RSO Pool. Once you have clicked the *Clear* button, the individuals you selected will be removed from the list and you should notice the number of customer records will change.

Customer Detail – This selection will bring you to the first *Customer Detail* record. To advance to the next *Customer Detail* record, click on the *Next* arrow located in lower right hand corner of your screen. To return to the previous *Customer Detail* record, click on the *Prev* arrow also located in lower right hand corner of your screen. Please refer to Section 4, Page 1.

Delete from Pool – This selection will permanently remove all of the individuals that have a check mark in the box located in the first column from the RSO Pool. Once you have clicked the *Delete from Pool* button, the individuals you selected will be removed from the list and deleted from the RSO Pool. You should notice the number of customer records will change.

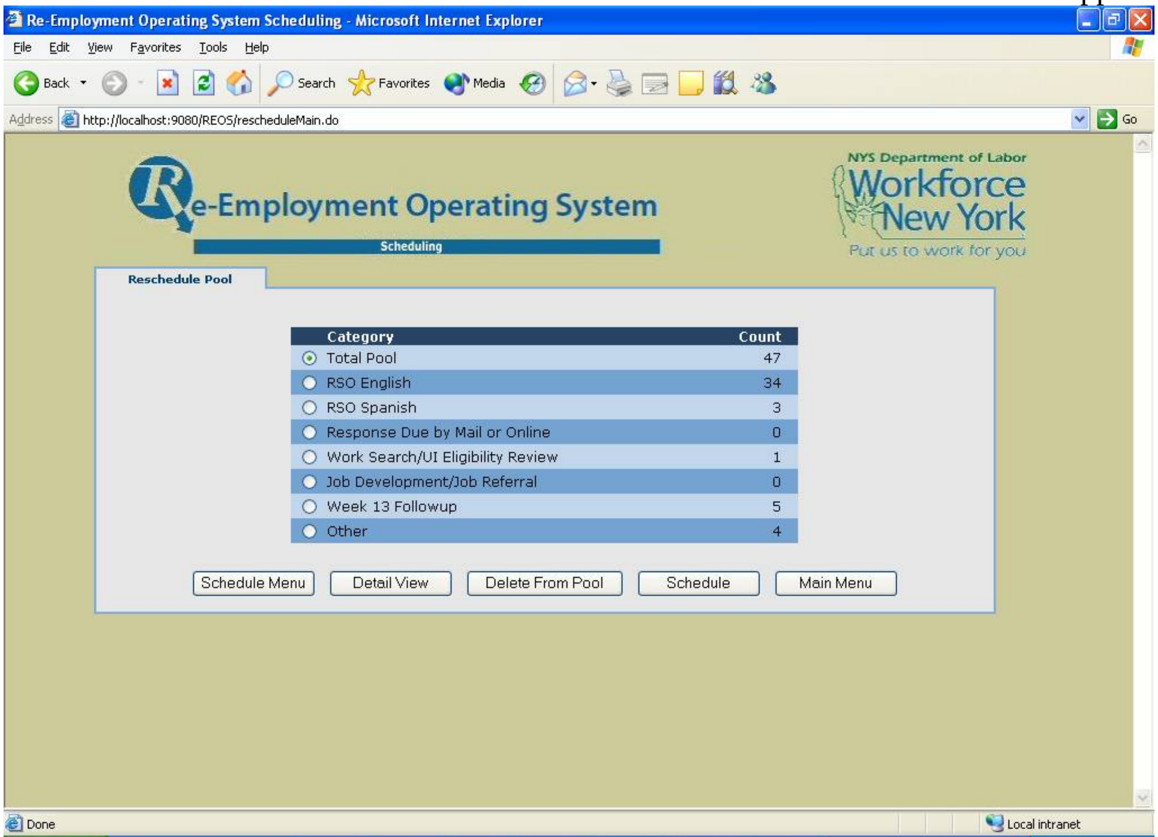
Schedule – This selection will initiate the scheduling process. Once you have clicked on the *Schedule* button, you must click on *Group* or *Individual*. The *Group Scheduling* or *Individual Scheduling* screen will now appear depending on your selection. Please refer to Section 7.

Group Update – This selection allows you to update multiple records at the same time. Please refer to Section 5, Page 1.

Main Menu – This selection will bring you back to the *Main Menu*.

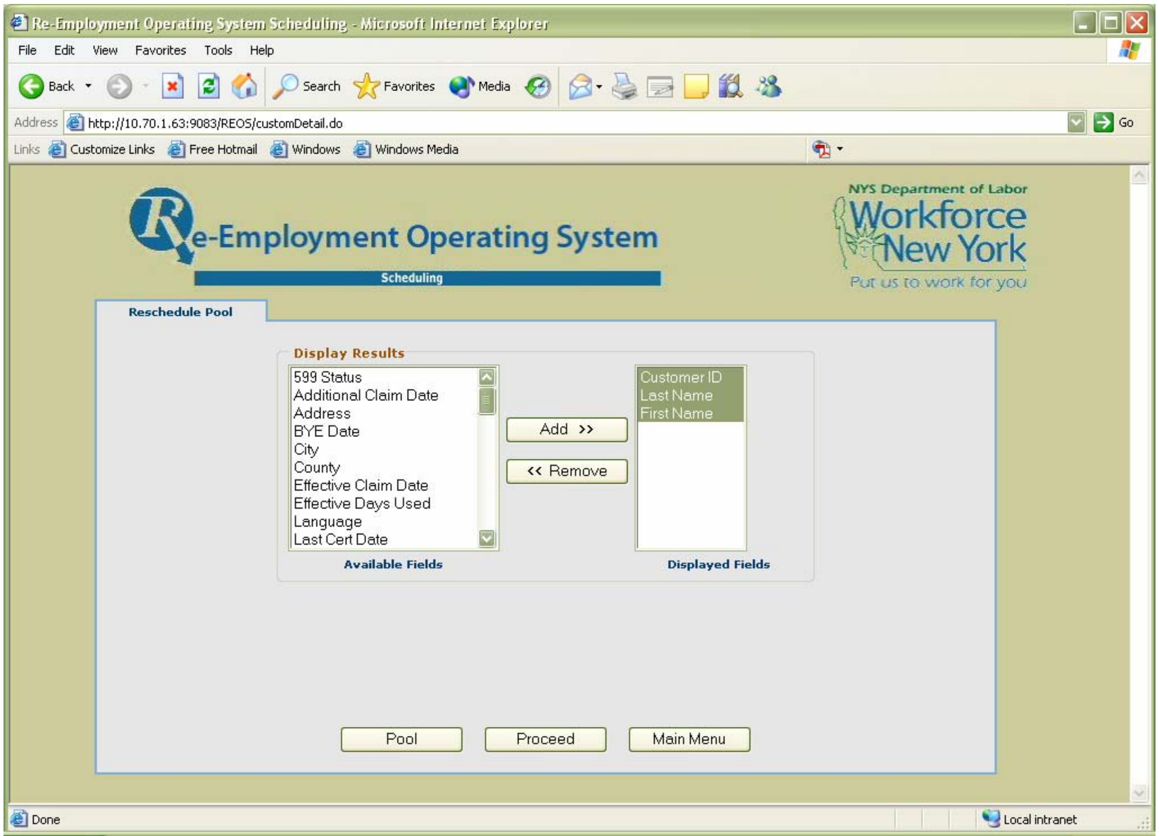
Reschedule Pool

1. Click on the *Schedule* button from *Main Menu.*
2. Click on the *Pools* button from *Scheduling Menu.*
3. Click on the *Reschedule Pool* button from the *Pools Menu*. The screen below will appear.

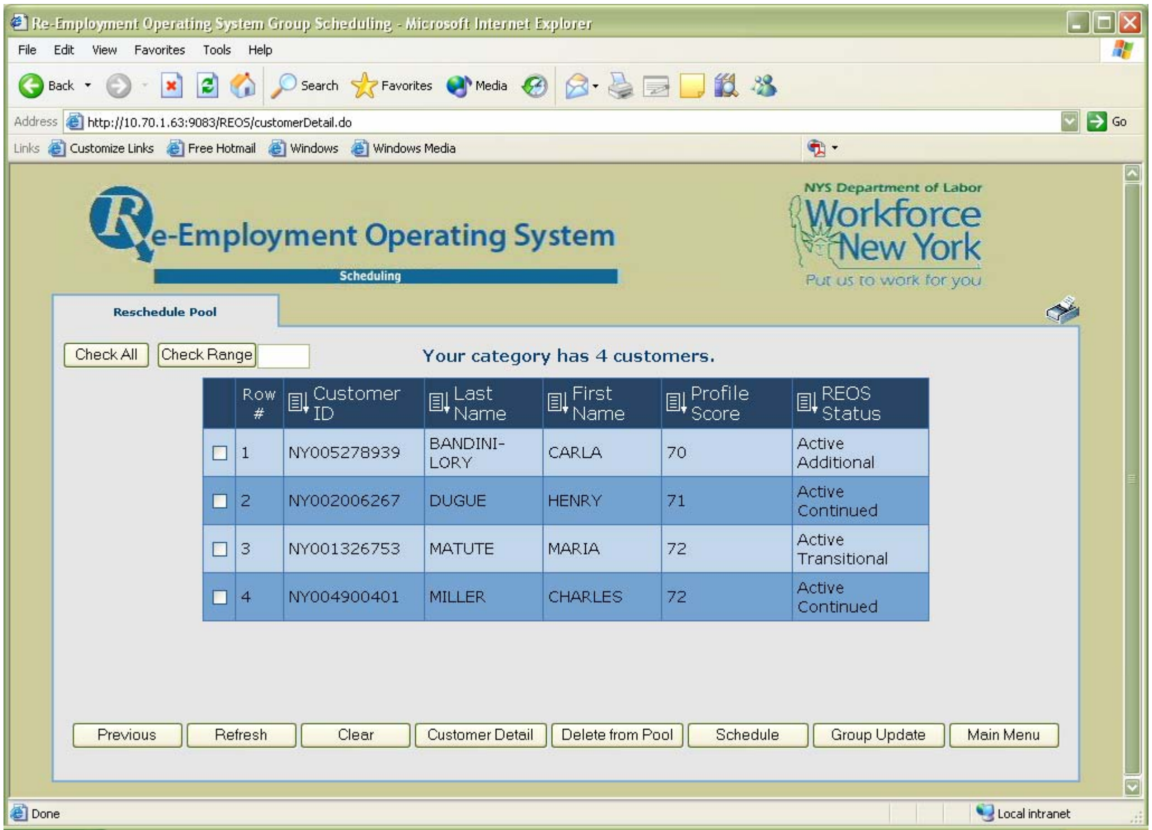


Please note: An individual can be included in multiple categories.

4. Click on the button next to the category you would like to schedule/view and do one of the following:
   - Click on the *Schedule* button and click on *Group* or *Individual*. The *Group Scheduling* or *Individual Scheduling* screen will now appear depending on your selection on the previous screen. Please refer to Section 7.
   - Click on the *Detail View* button and the screen below should appear.



At this point you make the selection(s) of information you want to be displayed before scheduling individuals (i.e., Profile Score, REOS Status, etc.). To add an available field(s), make a selection from the *Available Fields* list provided and click on the *Add* >> button. You can also remove a selection from the list of displayed fields by selecting the field you would like to remove from the *Displayed Fields* list provided and click on the << *Remove* button. **Please note**: You will need to repeat this process for each selection you would like displayed or removed. Click on the *Proceed* button. The individual(s) from the category you selected at the beginning of this step should appear with the information you chose to display. See below.



Above the list of individuals, the system will indicate exactly how many customer records will be referenced in this particular screen.

In the above screen you have the following options:

Check All – This selection will place a check mark in the first column for all of the individual(s) listed and the button name will change to *Uncheck All*. **Please note**: If you click on the *Uncheck All* button, you will remove all of the check marks in the first column for the individual(s) listed.

Check Range – This selection allows you to place check marks in the first column for a range of consecutive individuals. For example, if you would like to place a check mark in the first column for the third, fourth and fifth individuals listed, you would type 3-5 in the space provided next to the *Check Range* button and click the *Check Range* button.

Please note: You must use *Check All*, *Check Range*, or select an individual by placing a check mark in the box provided in the first column before clicking on any of the buttons listed below (with the exception of the *Previous*, *Refresh* and *Main Menu* buttons).

Previous – This selection will bring you back to the previous screen.

Refresh – This selection will refresh your screen by removing all check marks in the first column.

Clear – This selection allows you to remove individuals from the list without deleting them from the Reschedule Pool. Once you have clicked the *Clear* button, the individuals you selected will be removed from the list and you should notice the number of customer records will change.

Customer Detail – This selection will bring you to the first *Customer Detail* record. To advance to the next *Customer Detail* record, click on the *Next* arrow located in lower right hand corner of your screen. To return to the previous *Customer Detail* record, click on the *Prev* arrow also located in lower right hand corner of your screen. Please refer to Section 4, Page 1.

Delete from Pool – This selection will permanently remove all of the individuals that have a check mark in the box located in the first column from the Reschedule Pool. Once you have clicked the *Delete from Pool* button, the individuals you selected will be removed from the list and deleted from the Reschedule Pool. You should notice the number of customer records will change.

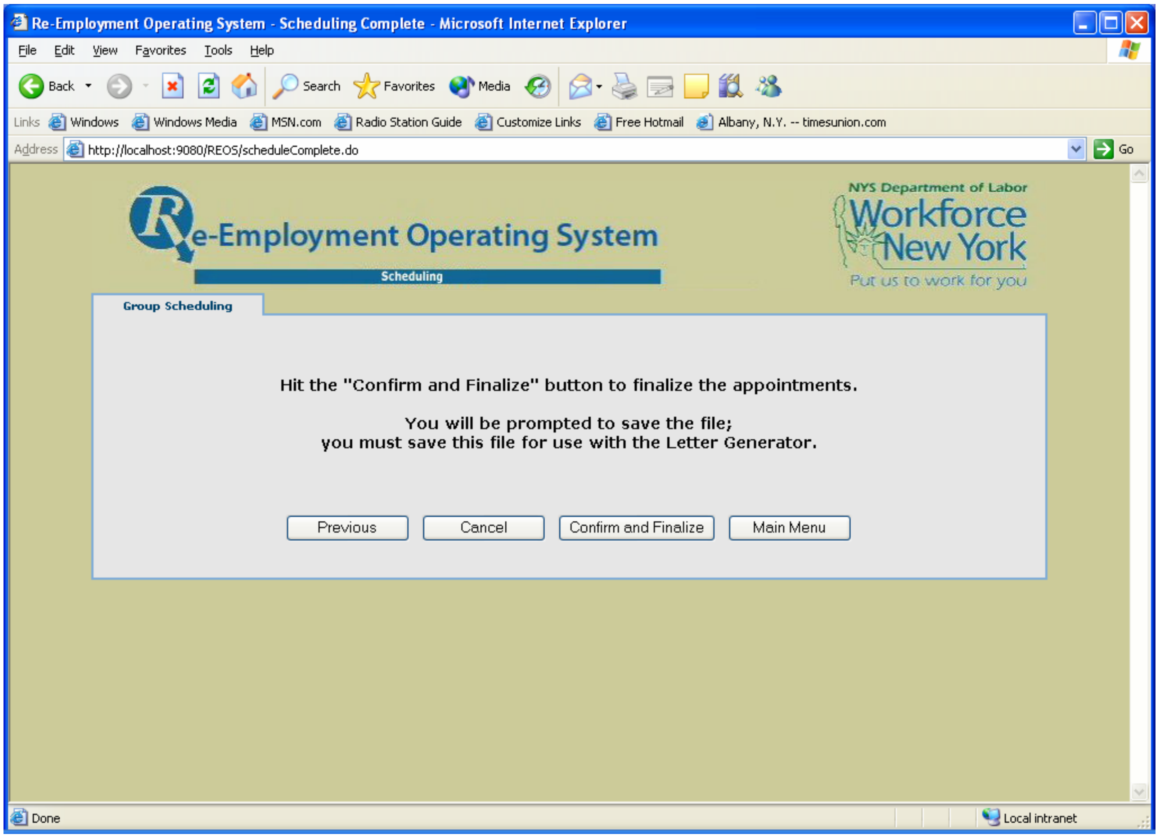
Schedule – This selection will initiate the scheduling process. Once you have clicked on the *Schedule* button, you must click on *Group* or *Individual*. The *Group Scheduling* or *Individual Scheduling* screen will now appear depending on your selection. Please refer to Section 7.

Group Update – This selection allows you to update multiple records at the same time. Please refer to Section 5, Page 1.

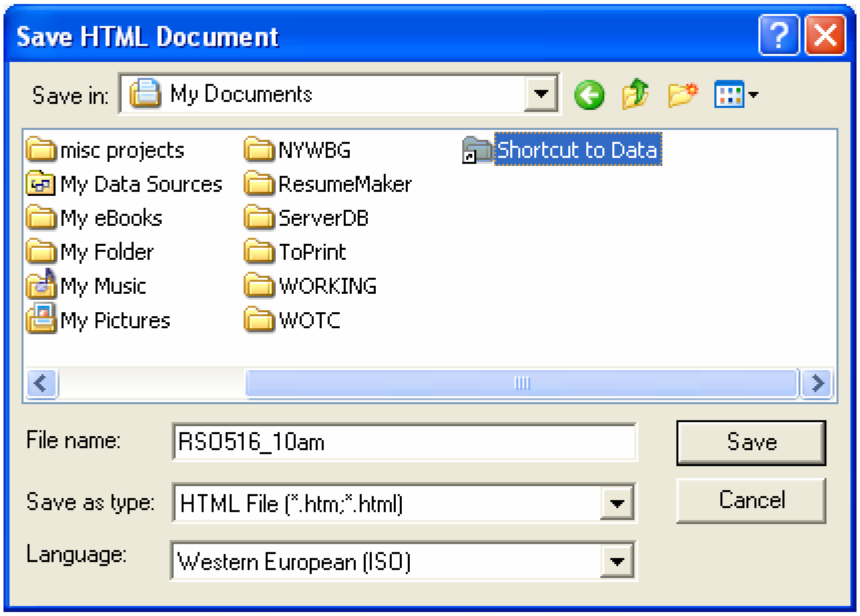
Main Menu – This selection will bring you back to the *Main Menu*.

REOS Letter Generation Instructions

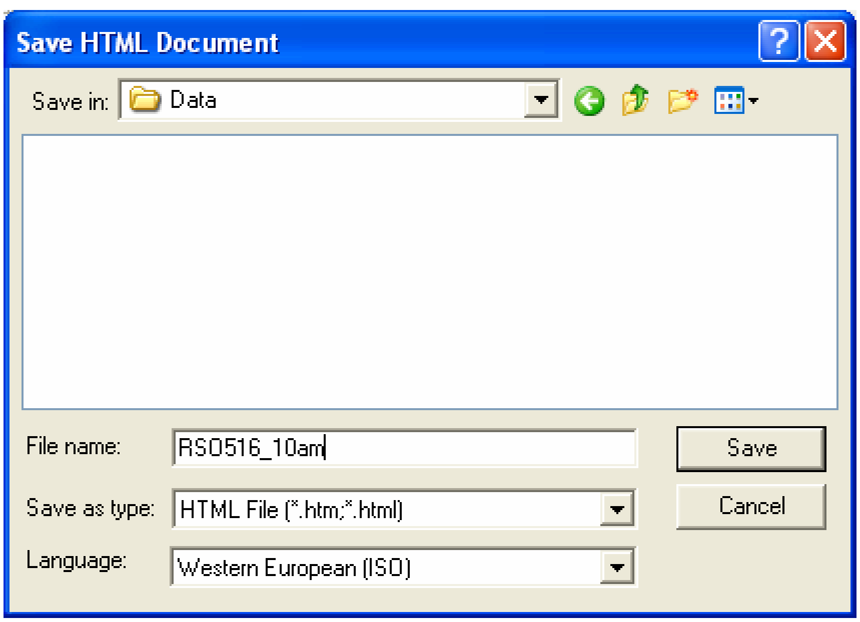
1. At the point where you have finished scheduling, click on the *Confirm and Finalize* button.



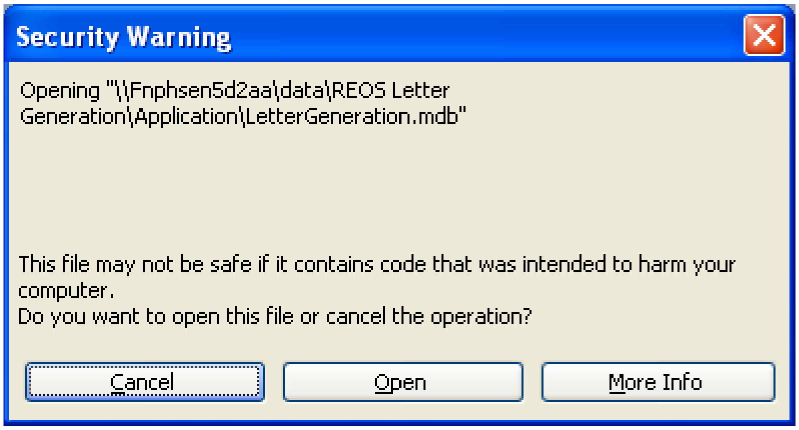
2. The screen below will appear. You need to save the HTML file in the *Data* folder of the *REOS Letter Generation* folder on your server. First, make sure that *My Documents* is selected in the *Save in* drop down box. Double click the *Shortcut to Data* in the *My Documents* folder.



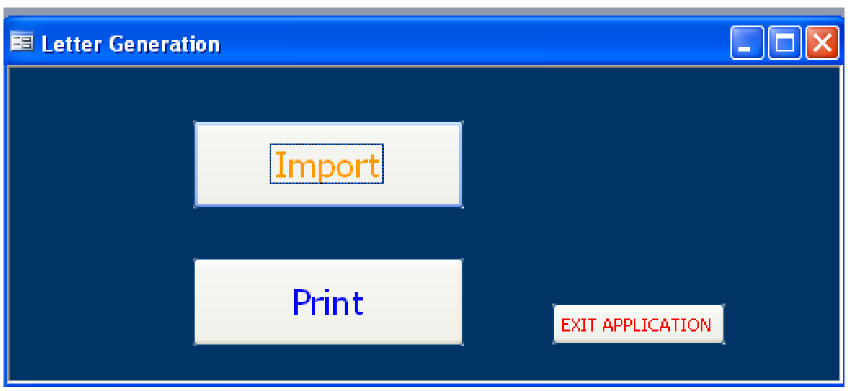
3. Make sure *Data* is displayed in the *Save in* drop down box. Click on the *Save* button to save the file. You should name your file using the Purpose, Appointment Date & Appointment Time naming convention, (i.e., RSO516_10am). At this point your file has been saved. To print your letters continue to Step 4.



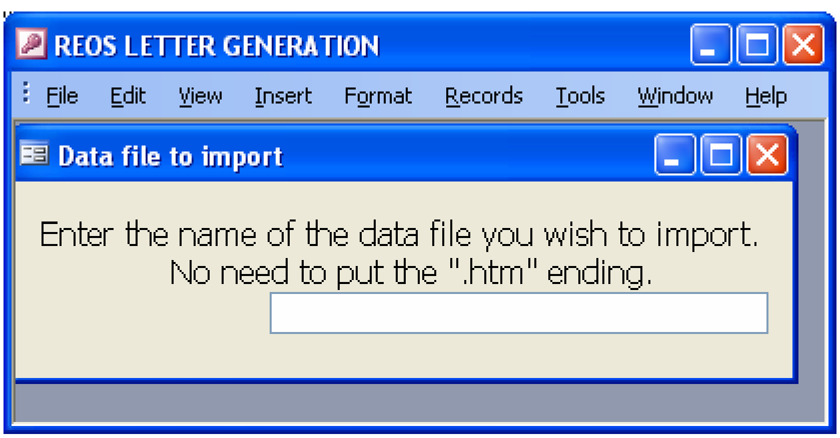
4. Double click on the *Shortcut to LetterGeneration.mdb* shortcut on your Desktop.
    - Click on *Open* to the Security Warning.



5. The screen below will appear.



6. Click on the *Import* button. The screen below will appear. Type the name of the file you just saved in the space provided and press the *Enter* key on your keyboard.

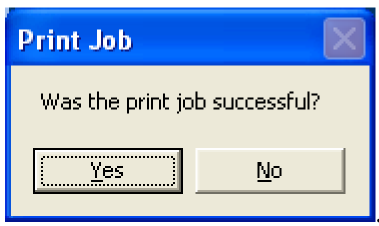


7. After you get the 

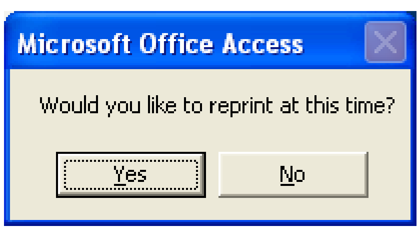
message, click on the *Print* button.

8. This will automatically open Microsoft Word and generate the letters. **Please note**: It may take some time. You can preview the letters to check to make sure everything is correct. To print your letter(s), click on *File* located in the upper left corner of your screen and click on *Print*. At this point you may change the printer settings if necessary and click on *OK*.

9. After the letters are printed, click on the *X* in the upper right corner of your screen to close Microsoft Word.

10. The database will ask 

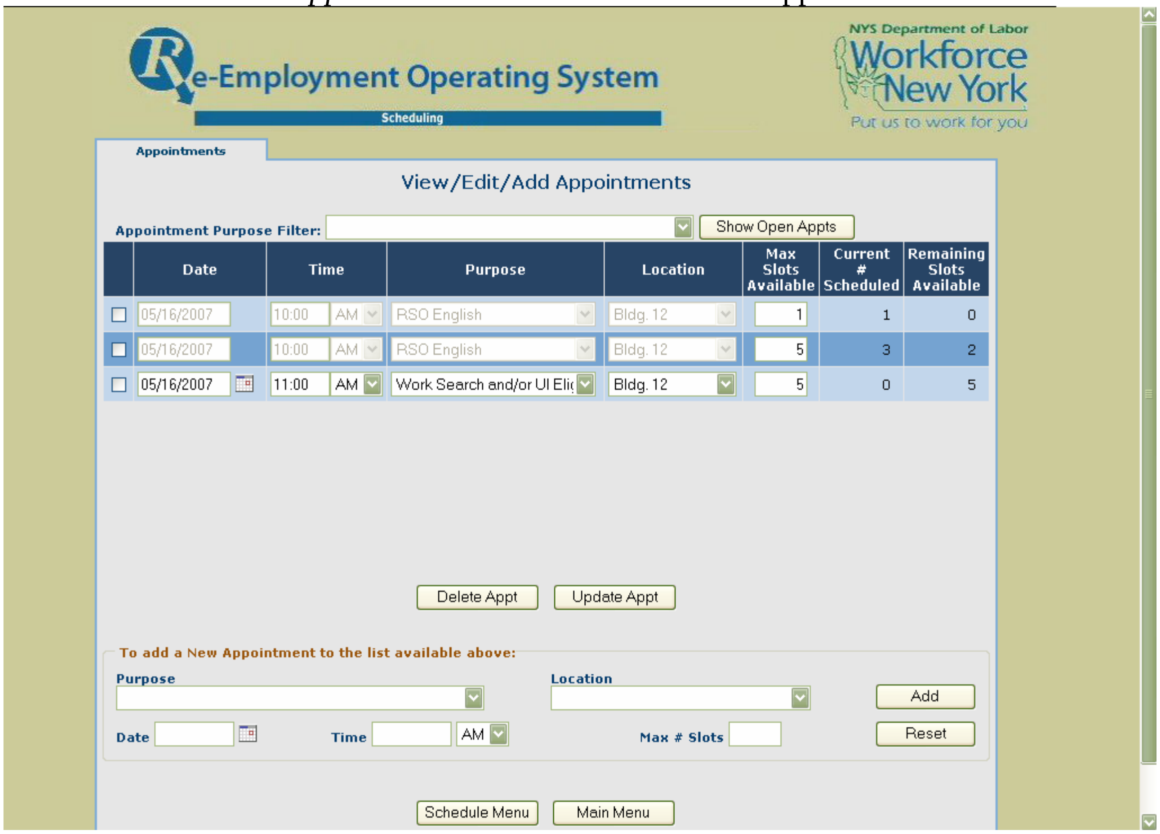
.
    - If yes, you can click on the *Yes* button and then click on the *EXIT APPLICATION* button to exit the database. This will automatically save copies of the letters in the *REOS Letter Generation* folder on your server, before deleting them from the database.
    - If *No*, you will be given the option to reprint the letters.



a. If *Yes*, the database will automatically open the letters in Microsoft Word again.
b. If *No*, the letters will be deleted from the database and **you will have to repeat Steps 4 through 8.**

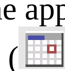
Add/Edit/Delete Appointments

1. Login to REOS using your OSOS username and password.
2. Click on *Schedule* from the *Main Menu*.
3. Click on the *Add/Edit Appts* button. The screen below will appear.



This screen displays the list of appointments scheduled for the office you are currently signed into. You have the following options:

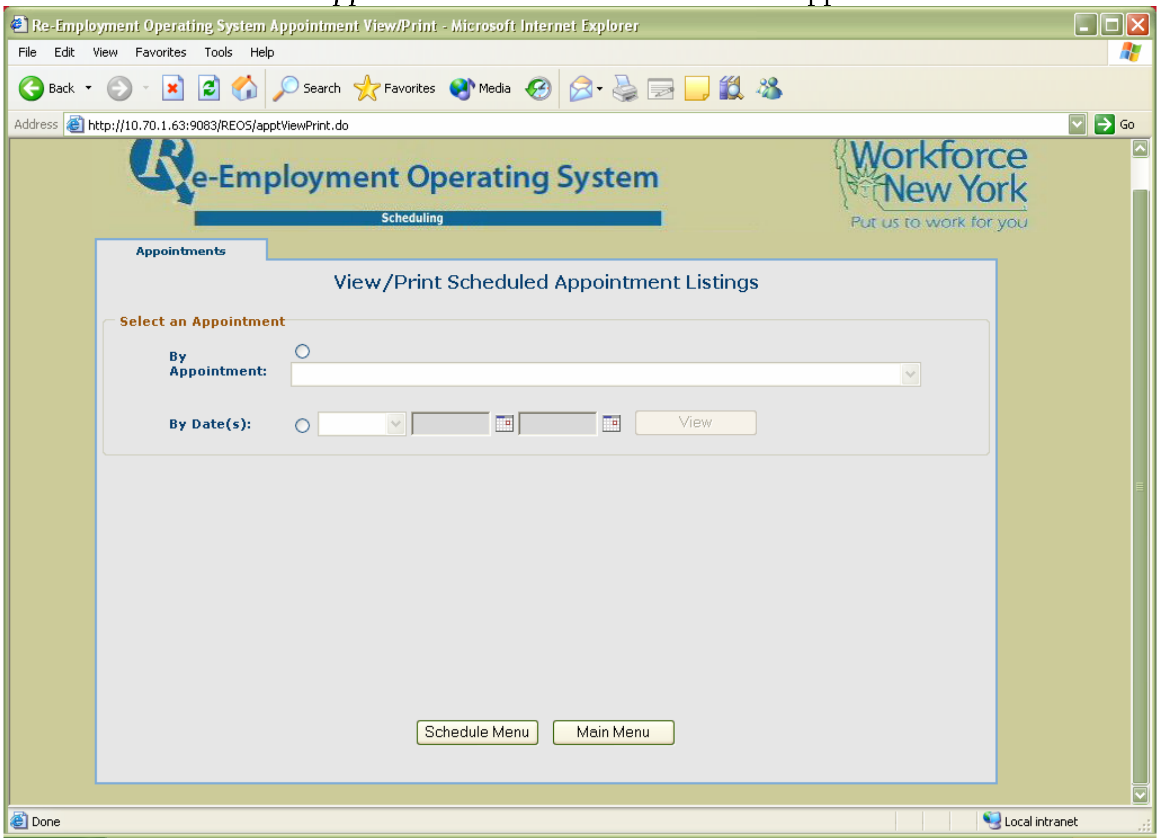
- To add an appointment, click on the *Purpose* drop down box located in the lower section of your screen and select the appropriate appointment purpose from the list provided.

  Click on the *Calendar* icon () to the right of the space provided next to *Date* and select the date for the appointment you are scheduling from the calendar that appears. Type the time of the appointment you are scheduling in the following format: HH:MM in the space provided next to *Time*. Click the drop down box to the right and select *AM* or *PM*. Click on the *Location* drop down box and select a location from the list provided. Click on the *Add* button to add the appointment to the list of appointments, or click on the *Reset* button to remove the information you selected in this step.
- To edit an appointment, click on the check box in the first column for the appointment you would like to edit. Make the necessary changes to the appointment and click the *Update Appt* button. **Please note**: If the number in the *Current # Scheduled* column is greater than zero (0), you will only be able to edit the number in the *Max Slots Available* column.
- To delete an appointment, click on the check box in the first column for the appointment you would like to remove and click the *Delete Appt* button. **Please note**: If the number in the *Current # Scheduled* column is greater than zero (0), you will not be able to delete the appointment.

- To filter your list of appointments by open appointments with a specific appointment purpose, click on the *Appointment Purpose Filter* drop down box and select an option from the list provided. Click on the *Show Open Appts* button. You will notice that the button name will now change to *Show All Appts*. Click on the *Show All Appts* button to display all of the appointments for the office you are currently signed into.
- To return to the *Scheduling Menu*, click on the *Schedule Menu* button.
- To return to the *Main Menu*, click on the *Main Menu* button.

View/Print Appointments

1. Login to REOS using your OSOS username and password.
2. Click on *Schedule* from the *Main Menu*.
3. Click on the *View/Print Appts* button. The screen below will appear.

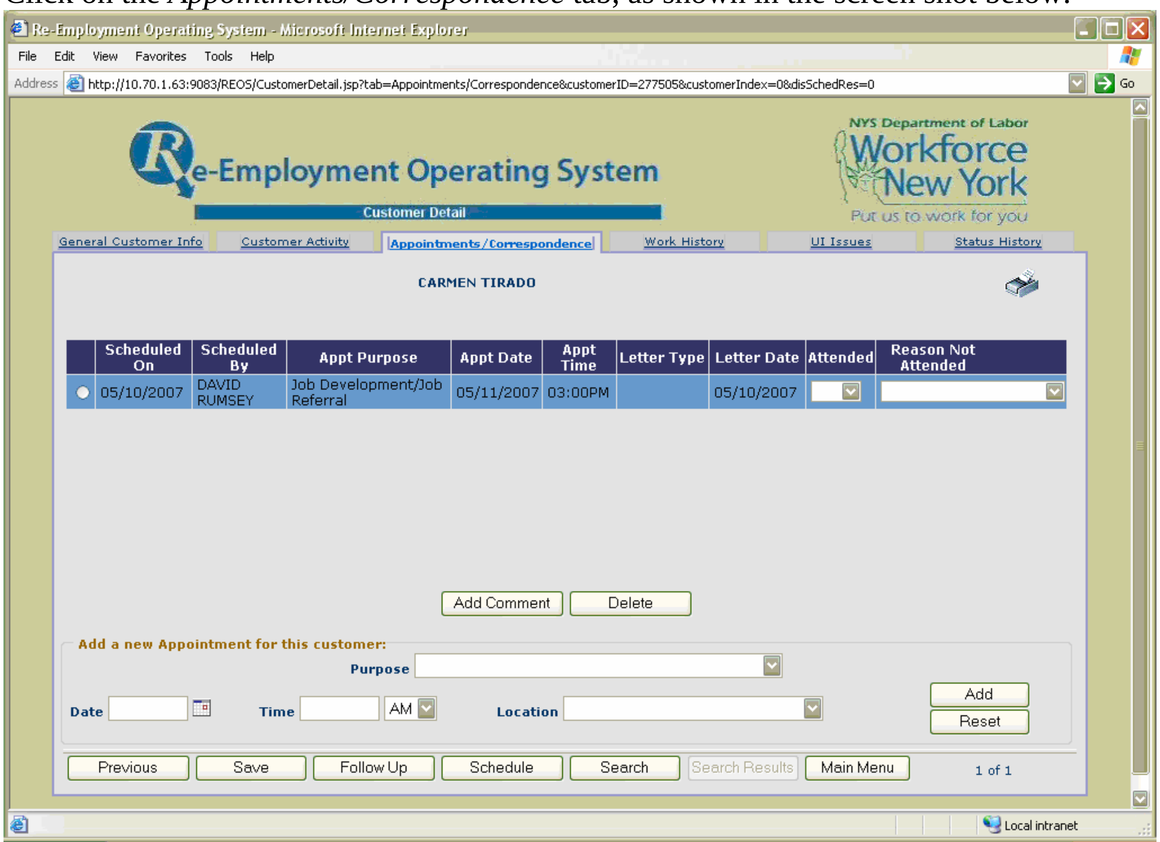


4. There two ways to view/print the individual or list of individuals scheduled for an appointment.
   - Select *By Appointment*, click on the drop down box, and choose a specific appointment from the list provided.
   - Select *By Date(s)*, click on the drop down box, and choose an option from the list provided. Click on the *Calendar* icon () next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *By Date(s)* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range. Click on the *View* button.
5. A list of all individuals scheduled for the appointment or date range you selected will appear. You have the option of clicking on one of the following buttons:
   - **Schedule Menu** – This selection will bring you back to the *Scheduling Menu*.
   - **Print List** – This selection will open a new window with a printable version of the individual(s) scheduled for the appointment or date range you selected in Step 4. This screen will display the purpose, location, date and time of the appointment, as well as the individual(s) customer ID, customer name (with a space provide to record attendance results and/or note the individuals ID was checked), and a space provided for the individual(s) to sign in. To print this screen, click on the *Print* button. At this point you may change the printer settings, if necessary, and click *OK*. To close this window, click on the *Close Window* button.

- **Print Contact Info –** This selection will open a new window with a printable version of the individual(s) contact information. This screen will display the purpose, location, date and time of the appointment, as well as the individual(s) customer ID, name, address and phone number. To print this screen, click on the *Print* button. At this point you may change the printer settings, if necessary, and click *OK*. To close this window, click on the *Close Window* button.
- **Main Menu –** This selection will bring you back to the *Main Menu*.

Recording Appointment Attendance Results from the Customer Detail Record

1. Login to REOS using your OSOS username and password.
2. Click on the *Search* button on the *Main Menu*.
3. Type the *SSN* or *Customer ID* number(s) for the individual(s) that you would like to record the appointment attendance result(s). Click on the *Search* button at the bottom of your screen.
    - If you entered only one *SSN* or *Customer ID*, the *Customer Detail* record will appear.
    - If you entered more than one *SSN* or *Customer ID* in the step above, the *Search Results* screen will appear. Click on the *Check All* button in the upper left hand side of your screen. Check marks will now appear in the first column of the search results. Click on the *Customer Detail* button at the bottom of your screen. The first *Customer Detail* record will now appear. To advance to the next *Customer Detail* record, click on the *Next* arrow located in lower right hand corner of your screen. To return to the previous *Customer Detail* record, click on the *Prev* arrow also located in lower right hand corner of your screen.
4. Click on the *Appointments/Correspondence* tab, as shown in the screen shot below.



Click on the drop down box in the *Attended* column for the specific appointment, and then click on *Yes* or *No*. **Please note:** There may be more than one appointment listed for an individual. Make sure you select the correct appointment.

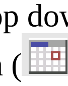
- If *Yes*, click on the *Save* button. You have now completed recording the appointment attendance result. **Please note**: Once you have entered *Yes* as the attendance result and saved the record, you will be unable to change the attendance result.
- If *No*, FTR is the default reason not attended, but you can select a different reason by clicking on the drop down box in the *Reason Not Attended* column, and clicking on the appropriate reason from the list provided. To save your entry, click on the *Save* button. You have now completed recording the appointment attendance result. **Please note**: If

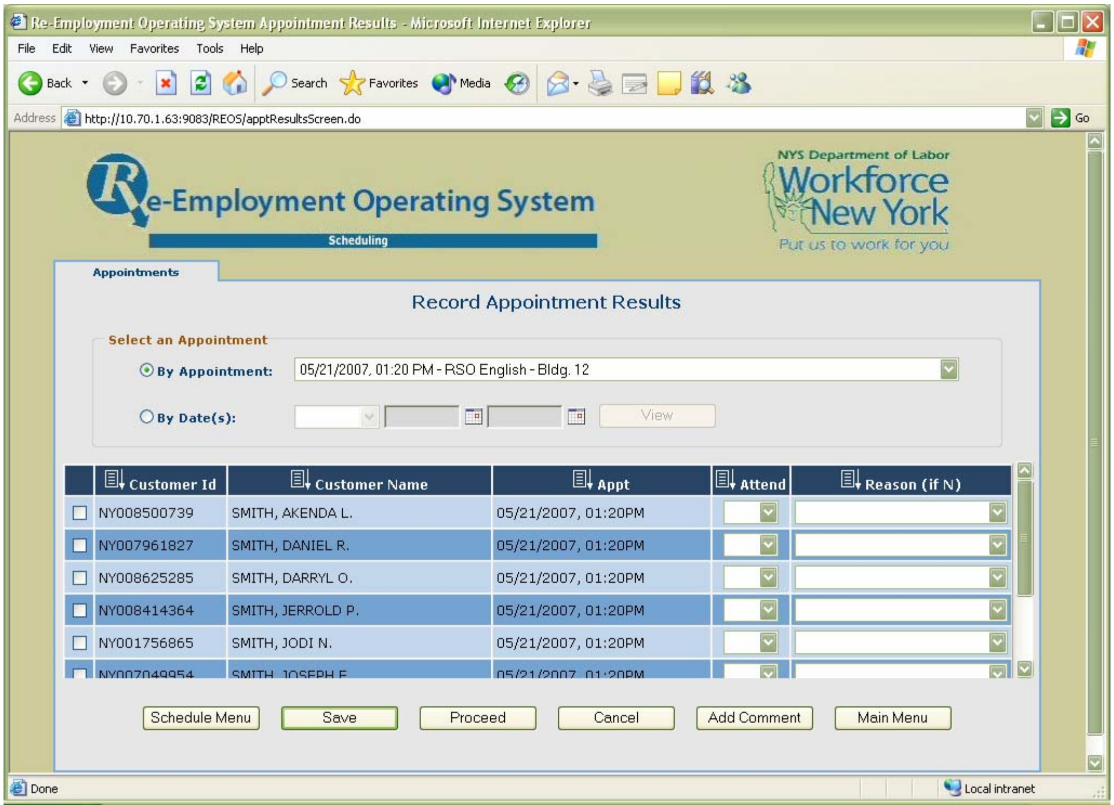
the individual is not currently certifying, the reason not attended will update to *Not Certifying* upon saving the record.

Please note: When you save the appointment attendance results for an individual appointment (i.e. an appointment where the individual is the only individual scheduled for that appointment), the appointment is automatically finalized. This means that the appointment you've resulted out will no longer appear on the *Record Appointment Results* screen, and you will not be able to place a hold on the individual's UI payments.

Important note: Currently a 2nd Failure to Report (FTR) cannot be placed from the *Customer Detail* record. To place a 2nd FTR, you must enter the appointment attendance result(s) through the *Record Appointment Results* screen. This process will be changed at a later date, and we will notify you when it is changed.

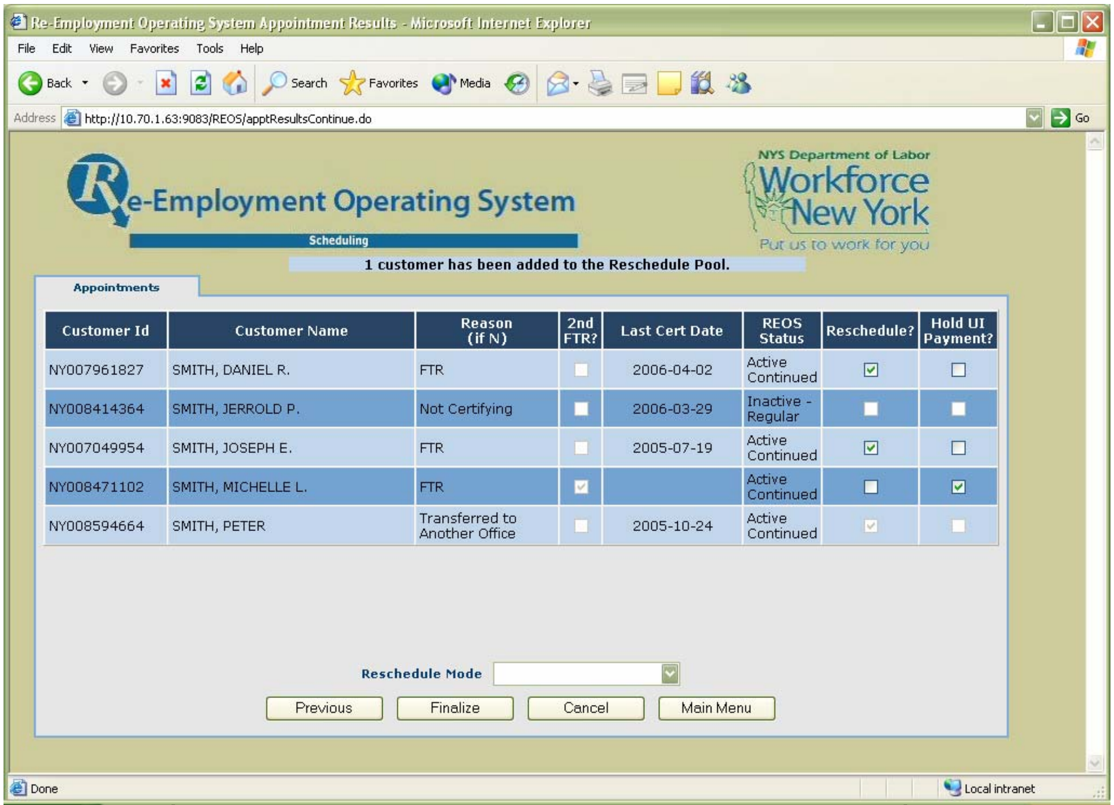
<u>Recording Appointment Attendance Results from the Record Appointment Results Screen</u>

1. Login to REOS using your OSOS username and password.
2. Click on *Schedule* from the *Main Menu*.
3. Click on the *Record Appt Results* button. The *Record Appointment Results* screen will appear.
4. There two ways to access the individual or list of individuals. **Please note**: If the appointment has been finalized, or the appointment date is more than thirty (30) days in the past you will not be able to record the appointment attendance result from this screen.
   - Select *By Appointment* and click on the drop down box. Choose a specific appointment from the list provided.
   - Select *By Date(s)* and click on the drop down box. Choose an option from the list provided. Click on the *Calendar* icon () next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *By Date(s)* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.
5. A list of all individuals scheduled for the appointment or date range you selected will appear, similar to the screenshot below.



Click on the drop down box in the *Attend* column, and click on *Yes* or *No*. If *No*, FTR is the default reason not attended, but you can select a different reason by clicking on the drop down box in the *Reason (if N)* column, and clicking on the appropriate reason from the list provided. At any time while completing this information, you can click on the *Save* button to store what you have entered. **Please note**: When you click on the *Save* button all *Yes* attendance results will be removed from the list and the appointment result will be finalized. When you click on the *Save* button all *No* attendance results will remain in the list, but if the individual is not currently certifying, the reason not attended will update to *Not Certifying* and you will not be able to reschedule the individual from this screen.

6. Once you have finished this process for each of the individuals listed, click on the *Proceed* button to continue to the next screen. The screen below (which is untitled) will only list the individuals that you recorded as *No* in the *Attend* column on the previous screen.



If this is a 2nd FTR, there will be a check mark in the box under the *2nd FTR?* column as well as a check mark in the box under the *Hold UI Payment?* column. **Please note:** You will not be able to uncheck the box in the *2nd FTR?* column. However, you can uncheck the box under the *Hold UI Payment?* column. If you do not remove the check mark in the *Hold UI Payment?* column, a hold will be placed on the individual's UI payments (the hold will not be visible on the UI Mainframe Control screen until the following day). If this is a 1st FTR, there will be a check mark in the box under the *Reschedule?* column. If you do not remove the check mark in the *Reschedule?* column, you must select a reschedule mode (*Group*, *Individual* or *Add to Reschedule Pool*) from the *Reschedule Mode* drop down box. REOS will not allow you to place a check mark in both the *Hold UI Payment?* and *Reschedule?* column for the same individual. Once you have chosen to *Reschedule*, *Hold UI Payment* or neither for each individual listed, click on the *Finalize* button. A pop-up message will appear stating that you are about to finalize appointment(s) and will not be able to modify the appointment attendance results from the *Record Appointment Results* screen, as well as the number of individuals you will be placing on hold and/or rescheduling. **Please note**: If the reason not attended is *Transferred to Another Office*, the system will grey out all choices for this individual, automatically place a check mark in the *Reschedule?* column and the individual will be added to the *Reschedule Pool* of the reporting office listed on the *General Info* tab of their *Customer Detail* record (as shown in the screen shot above). All UI holds will be placed after clicking on the *Finalize* button. UI holds will not appear on the UI Mainframe Control screen until the following day. **Please note**: Once you have finalized an appointment it will no longer appear in the list of appointments on the *Record Appointment Results* screen.

7. Depending on the option(s) you selected on the previous screen, you need to do the following:
   - *Reschedule?* – The *Group Scheduling*, *Individual Scheduling* or *Schedule Menu* will now appear depending on your selection from the *Reschedule Mode* drop down box on the previous screen. Please refer to Section 7. **Please note**: If you also have individuals selected to hold their UI payment, you will see a message on either scheduling screen

informing you of the number of UI holds that have been placed (UI holds will not appear on the UI Mainframe Control screen until the following day).

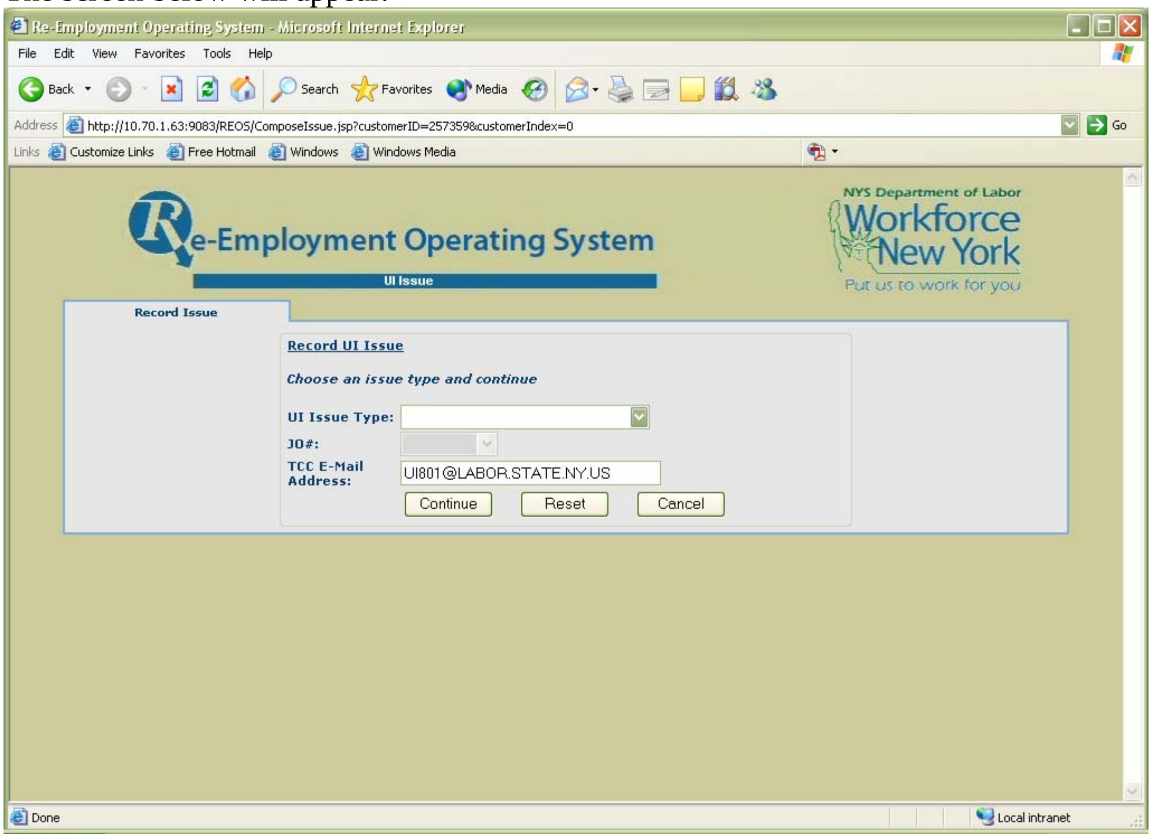
- *Hold UI Payment?* – If you chose only to place a UI hold(s), the *Schedule Menu* will appear and you will see a message informing you of the number of UI holds that have been placed. (UI holds will not appear on the UI Mainframe Control screen until the following day.) **Please note:** If you also have individuals selected to be rescheduled, the *Group Scheduling* or *Individual Scheduling* or *Schedule Menu* will now appear depending on your selection from the *Reschedule Mode* drop down box on the previous screen. Please refer to Section 7.
- Neither – If you did not choose to *Reschedule?* or *Hold UI Payment?*, the *Schedule Menu* will now appear.

Reporting UI Issues

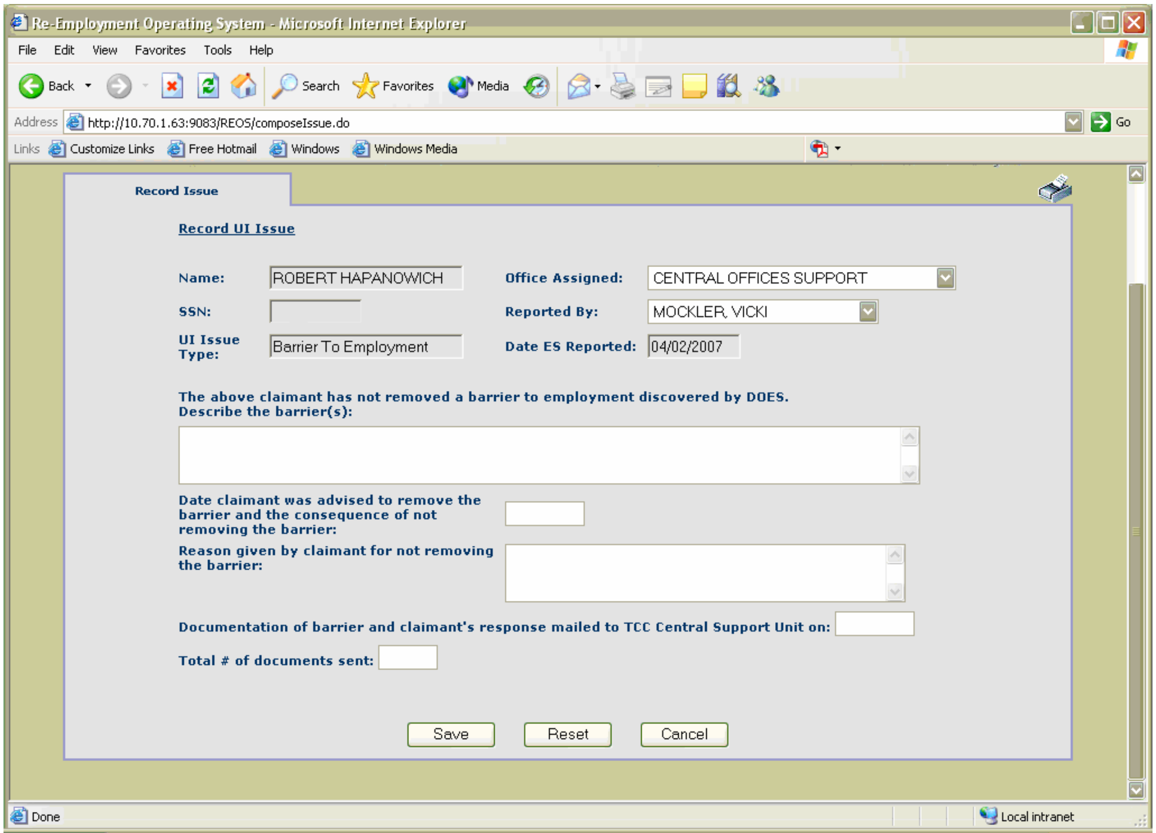
Please note: All UI issues should be sent by e-form from the *Customer Detail* record (Please refer to Section 4, Page 1), with the exception of 2nd FTRs. 2nd FTRs are reported during the *Record Appointment Results* process (Please refer to Section 10, Page 2).

Barrier Not Removed/Availability

1. Click on the *Record UI Issue* button from the *UI Issues* tab of the individual's *Customer Detail* record. The screen below will appear.



2. Click on the *UI Issue Type* drop down box and select *Barrier Not Removed/Availability* from the list provided.
3. You can now change the pre-populated e-mail address in the space provided next to *TCC E-Mail Address*, if necessary, and click on the *Continue* button to continue recording the issue. The screen below will appear. You can click on the *Reset* button to remove any of the information you have entered on this screen, or click on *Cancel* button to remove the information you have entered on this screen and return to the *UI Issues* tab of the individual's *Customer Detail* record without sending the issue.

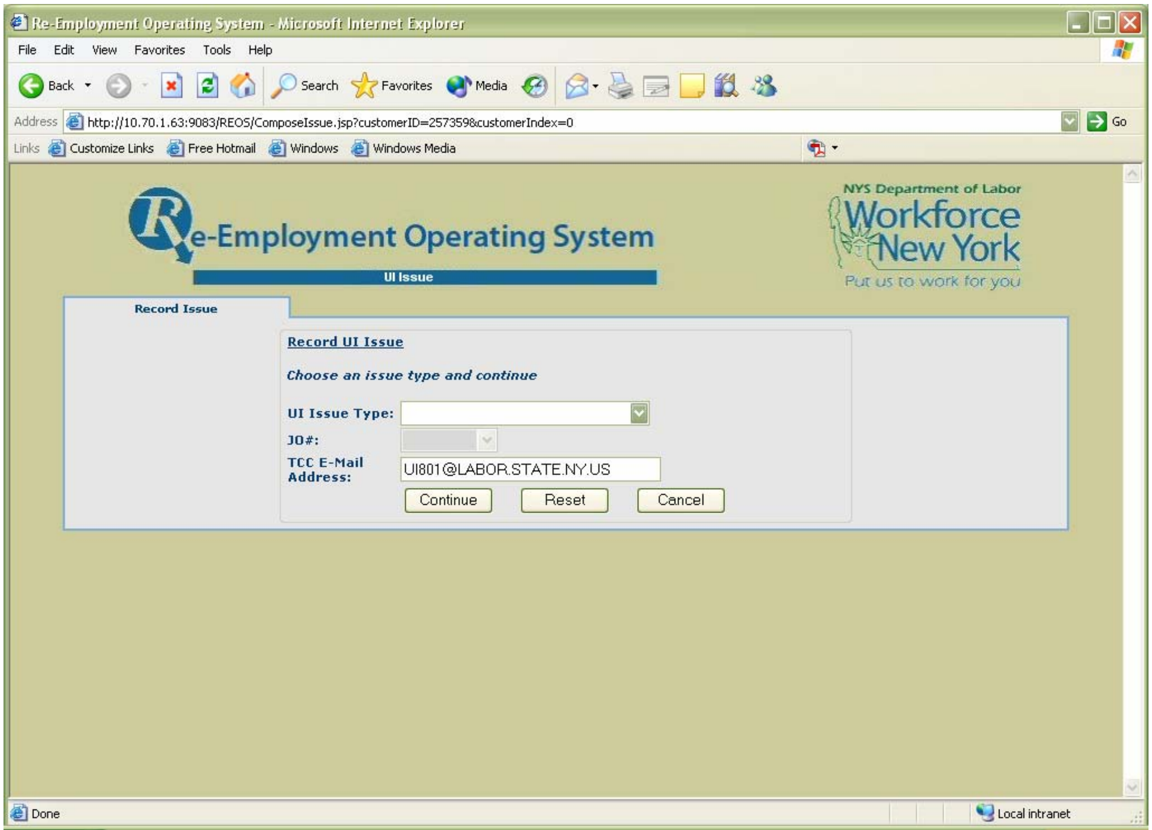


4. The following fields will always be pre-populated: Name, Office Assigned, SSN, Reported By, UI Issue Type, and Date ES Reported. At this point you should fill in the remainder of the form. The following fields are required, but you should always fill in as much of the form as possible:
   - The above claimant has not removed a barrier to employment discovered by DoES. Describe the barrier(s);
   - Reason given by claimant for not removing the barrier;
   - Total # of documents sent.

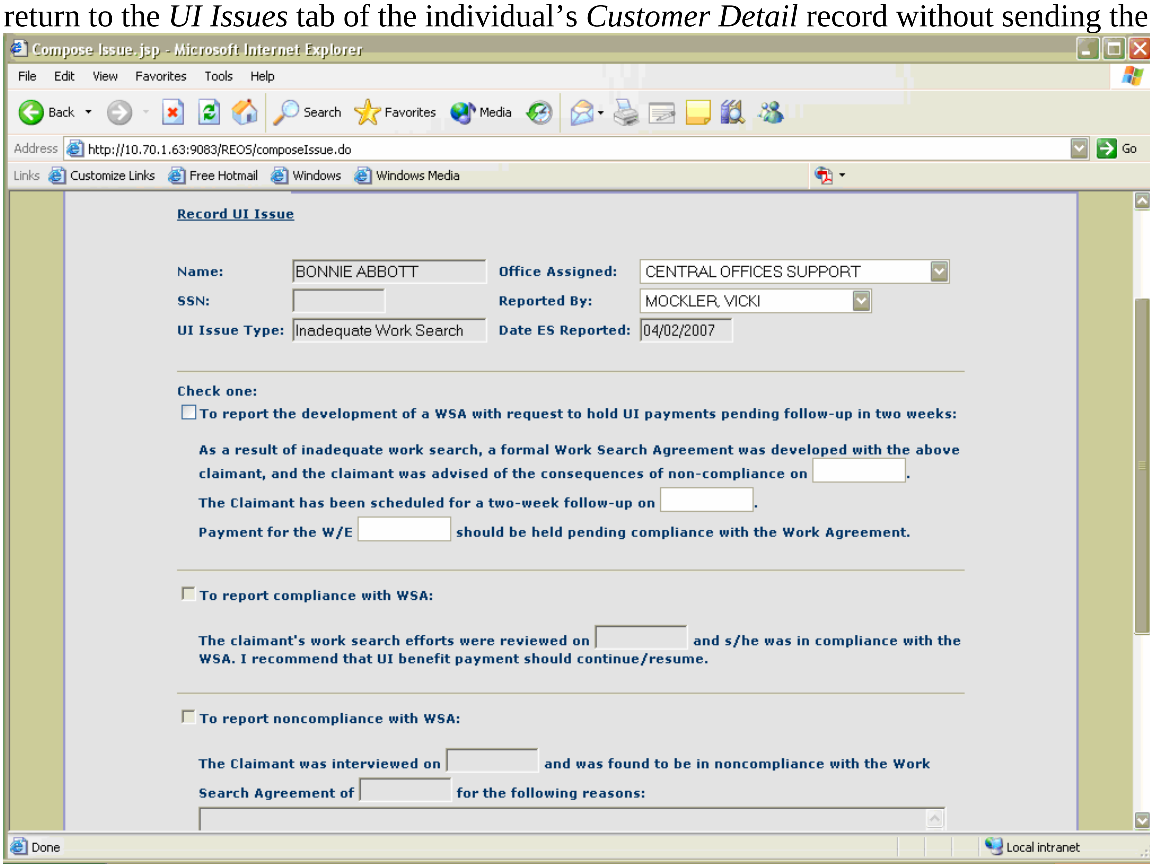
   Click on the *Save* button to save the issue and send the e-form to the TCC e-mail address; or click on the *Reset* button to remove all of the information you have entered on this screen; or click on the *Cancel* button to remove all of the information you have entered on this screen and return to the previous screen without saving the UI issue.

Inadequate Work Search

1. Click on the *Record UI Issue* button from the *UI Issues* tab of the individual's *Customer Detail* record. The screen below will appear.



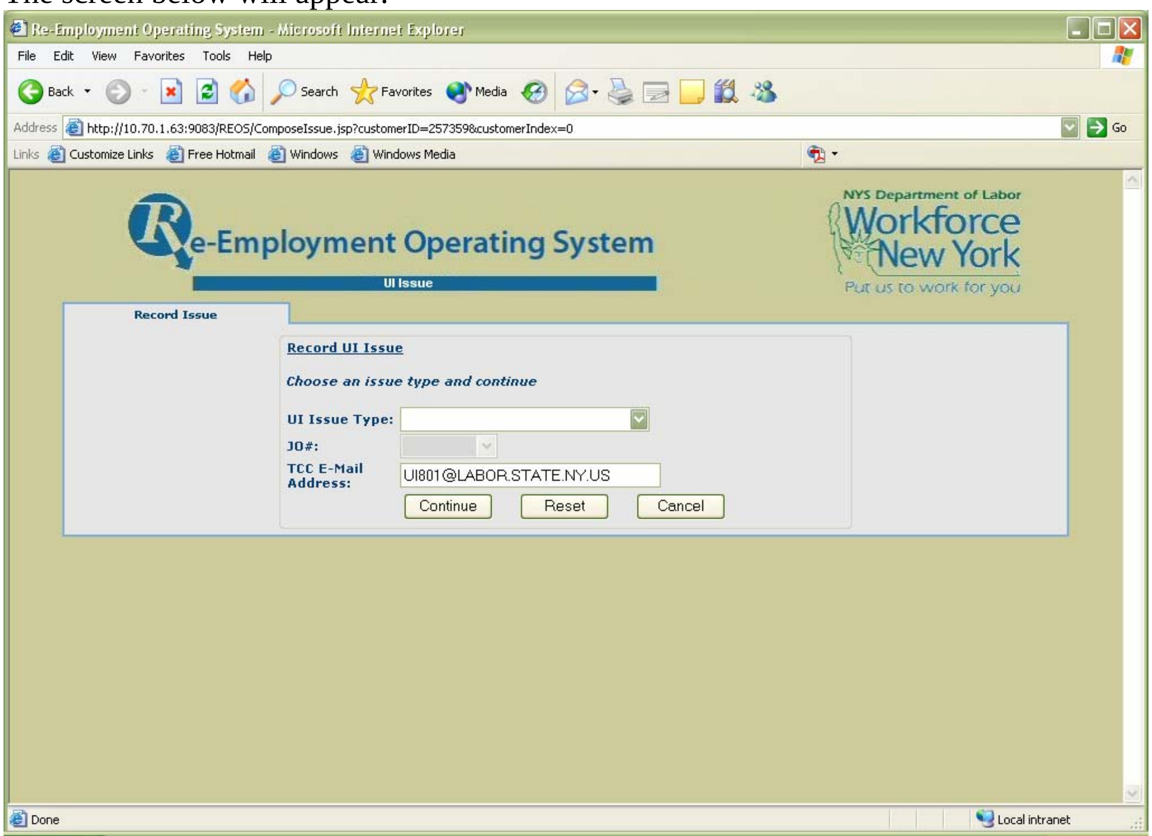
2. Click on the *UI Issue Type* drop down box and select *Inadequate Work Search* from the list provided.
3. You can now change the pre-populated e-mail address in the space provided next to *TCC E-Mail Address*, if necessary, and click on the *Continue* button to continue recording the issue. The screen below will appear. You can click on the *Reset* button to remove any of the information you have entered on this screen, or click on *Cancel* button to remove the information you have entered on this screen and return to the *UI Issues* tab of the individual's *Customer Detail* record without sending the issue.



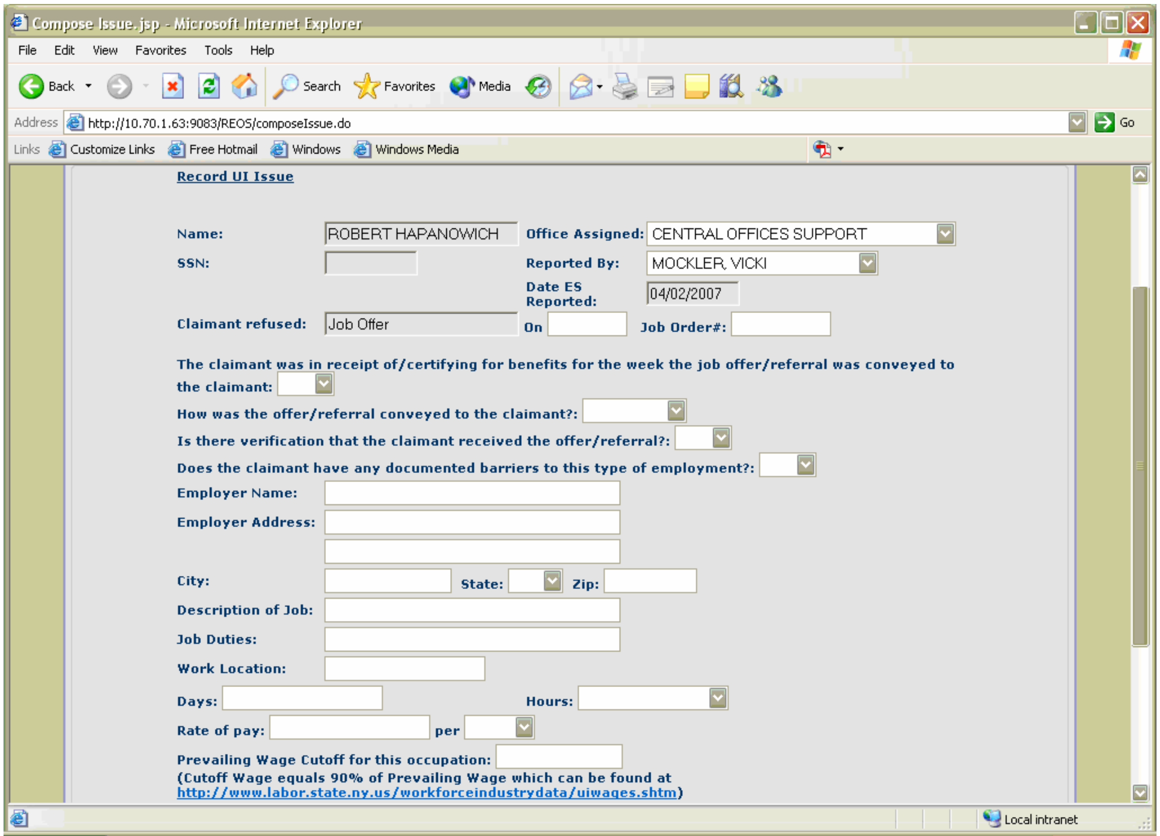
The following fields will always be pre-populated: Name, Office Assigned, SSN, Reported By, UI Issue Type, and Date ES Reported. If this is the initial inadequate work search issue being sent, you will notice you only have the option of selecting *To report the development of a WSA with request to hold UI payments pending follow-up in two weeks*. If you're reporting compliance or noncompliance with the developed WSA, you should now select either *To report compliance with WSA* or *To report noncompliance with WSA.* Complete the remaining fields that are available and click on the *Save* button to save the issue and send the e-form to the TCC e-mail address; or click on the *Reset* button to remove all of the information you have entered on this screen; or click on the *Cancel* button to remove all of the information you have entered on this screen and return to the previous screen without saving the UI issue.

Refusal of Job Offer or Job Referral

1. Click on the *Record UI Issue* button from the *UI Issues* tab of the individual's *Customer Detail* record. The screen below will appear.



2. Click on the *UI Issue Type* drop down box and select *Refusal – Job Offer* or *Refusal – Job Referral* from the list provided. You will notice the *JO#* drop down box will now be available for use.
3. Click on the *JO#* drop down box and select the job order number for the refusal you are reporting. If you do not know the job order number, or if it is not in the list provided, you should leave this drop down box blank.
4. You can now change the pre-populated e-mail address in the space provided next to *TCC E-Mail Address*, if necessary, and click on the *Continue* button to continue recording the issue. The screen below will appear. You can click on the *Reset* button to remove any of the information you have entered on this screen, or click on *Cancel* button to remove the information you have entered on this screen and return to the *UI Issues* tab of the individual's *Customer Detail* record without sending the issue.

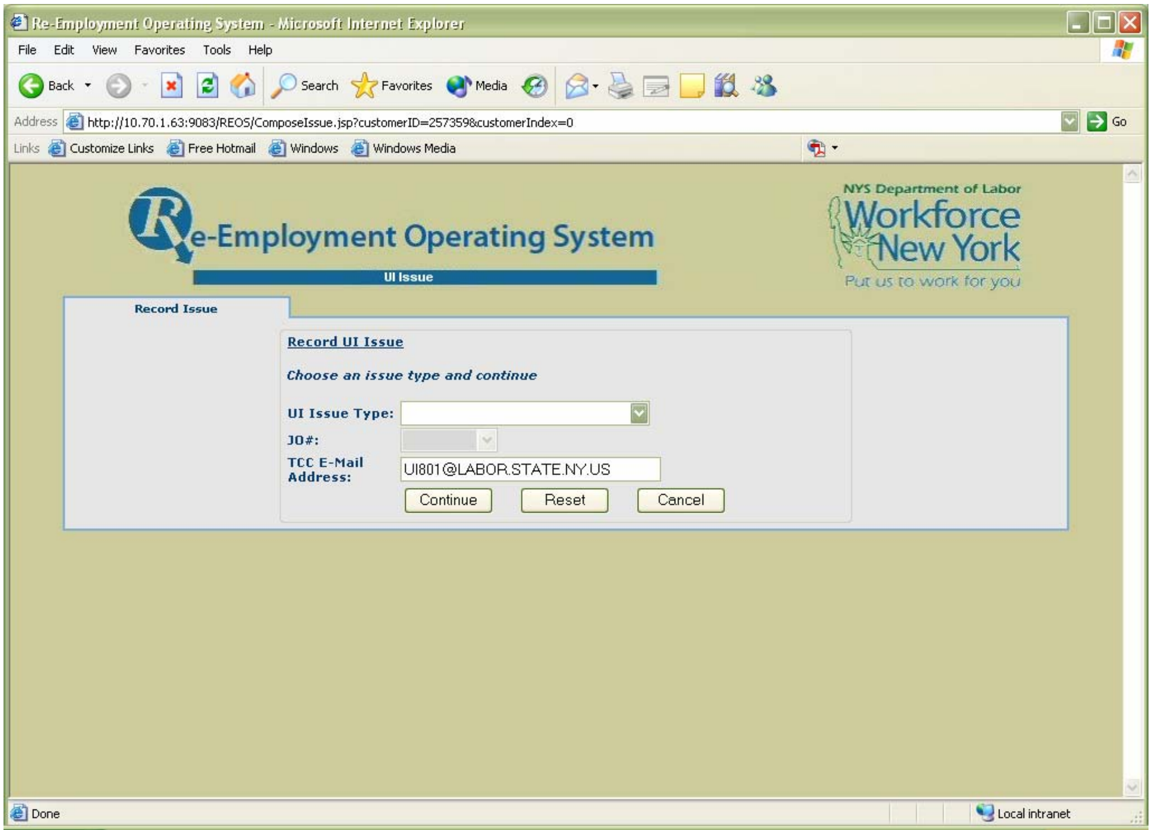


5. The following fields will always be pre-populated: Name, Office Assigned, SSN, Reported By, Date ES Reported, and Claimant Refused. If you selected the job order number from the *JO#* drop down box on the previous screen, the following fields will also be pre-populated: Job Order#, Employer Name, Employer Address, City, State, Zip, Description of Job, Job Duties, Work Location, Days, Hours, and Rate of pay. At this point you should fill in the remainder of the form. The following fields are required, but you should always fill in as much of the form as possible:
   - Date the claimant refused the offer/referral on in MM/DD/YY format;
   - Job Order#;
   - How was the offer/referral conveyed to the claimant?;
   - Does the claimant have any documented barriers to this type of employment?;
   - Is there verification that the claimant received the offer/referral?;
   - Total # of documents sent.

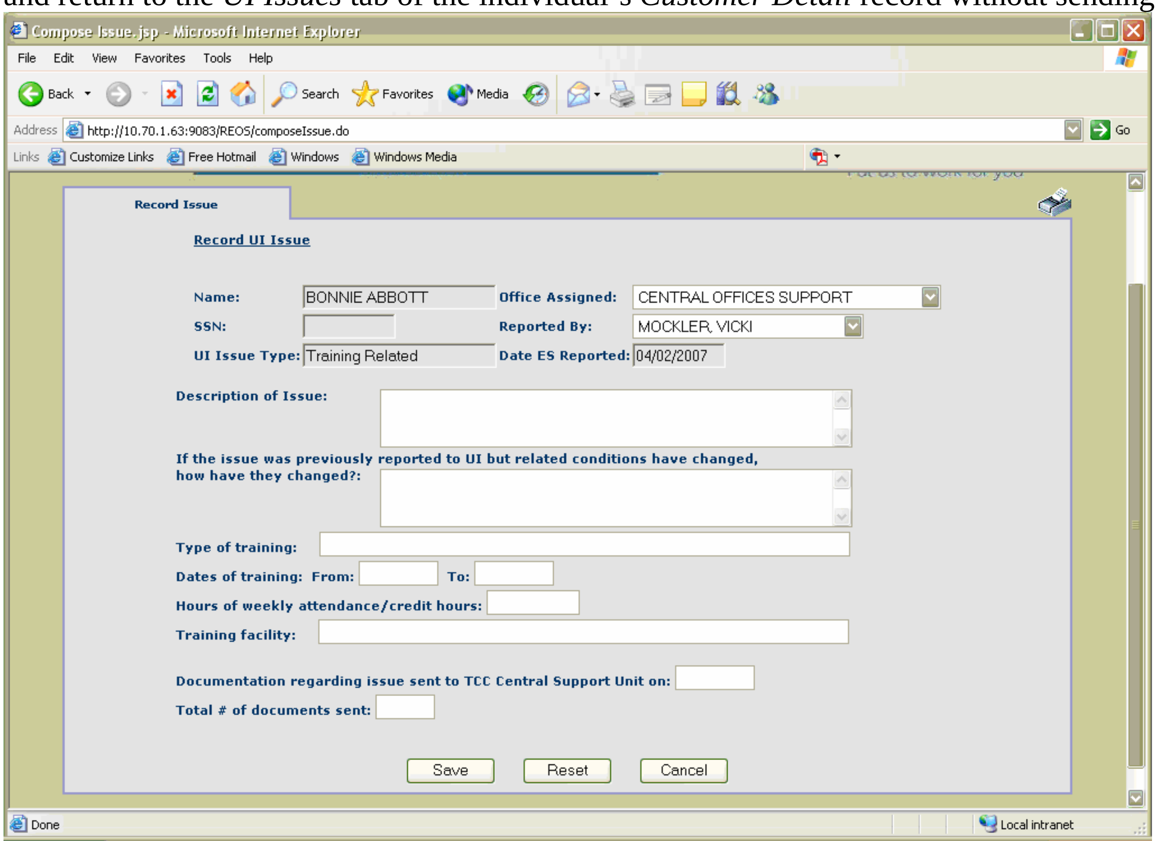
   Click on the *Save* button to save the issue and send the e-form to the TCC e-mail address; or click on the *Reset* button to remove all of the information you have entered on this screen; or click on the *Cancel* button to remove all of the information you have entered on this screen and return to the previous screen without saving the UI issue.

Training Related

1. Click on the *Record UI Issue* button from the *UI Issues* tab of the individual's *Customer Detail* record. The screen below will appear.



2. Click on the *UI Issue Type* drop down box and select *Training Related* from the list provided.
3. You can now change the pre-populated e-mail address in the space provided next to *TCC E-Mail Address*, if necessary, and click on the *Continue* button to continue recording the issue. The screen below will appear. You can click on the *Reset* button to remove any of the information you have entered on this screen, or click on the *Cancel* button to remove the information you have entered on this screen and return to the *UI Issues* tab of the individual's *Customer Detail* record without sending the issue.



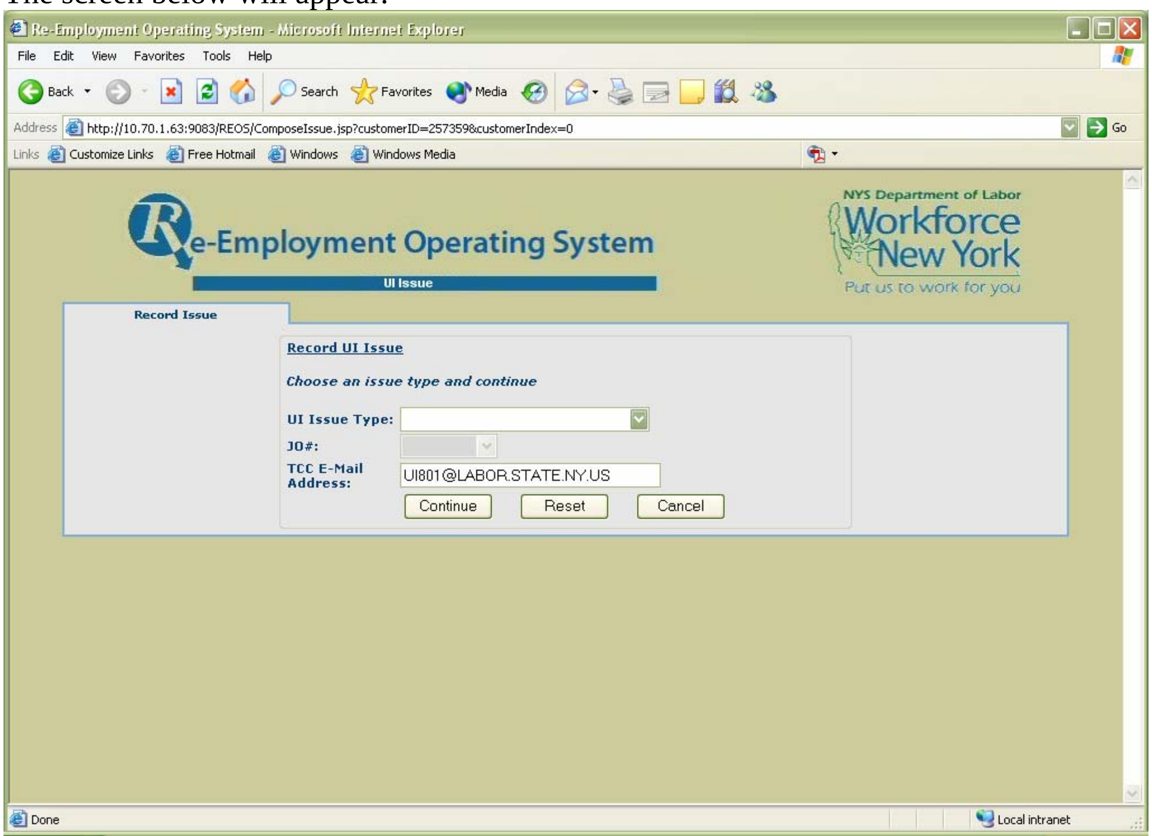
4. The following fields will always be pre-populated: Name, Office Assigned, SSN, Reported By, UI Issue Type, and Date ES Reported. At this point you should fill in the remainder of the form. The following fields are required, but you should always fill in as much of the form as possible:
    - Description of Issue;
    - Type of training;
    - Total # of documents sent.

   Click on the *Save* button to save the issue and send the e-form to the TCC e-mail address; or click on the *Reset* button to remove all of the information you have entered on this screen; or click on the *Cancel* button to remove all of the information you have entered on this screen and return to the previous screen without saving the UI issue.

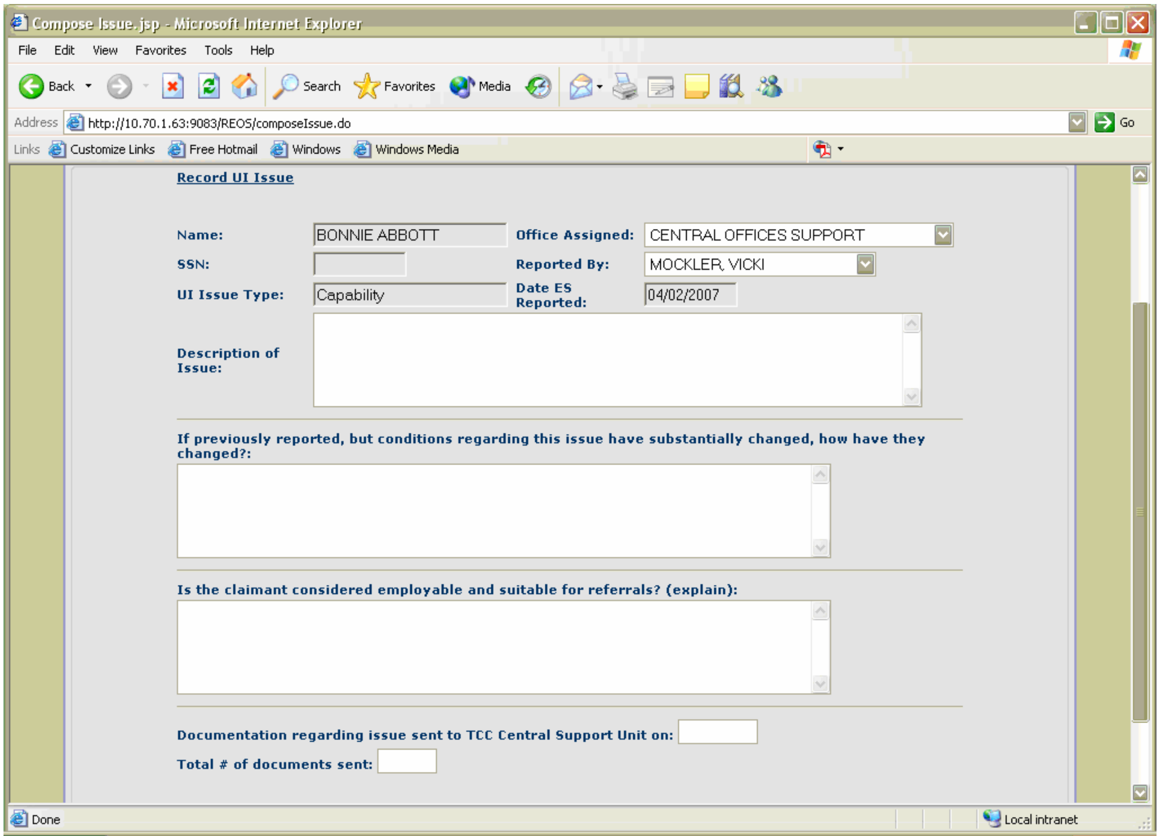
All Other UI Issues

This procedure should be followed for the following UI issues: Capability, Concealment of Employment, Corporate Officer, NTU (Not Totally Unemployed), Self-Employment, and Other.

1. Click on the *Record UI Issue* button from the *UI Issues* tab of the individual's *Customer Detail* record. The screen below will appear.



2. Click on the *UI Issue Type* drop down box and select one of the following from the list provided: *Capability*, *Concealment of Employment*, *Corporate Officer*, *NTU (Not Totally Unemployed)*, *Self-Employment*, or *Other*.
3. You can now change the pre-populated e-mail address in the space provided next to *TCC E-Mail Address*, if necessary, and click on the *Continue* button to continue recording the issue. The screen below will appear. You can click on the *Reset* button to remove any of the information you have entered on this screen, or click on *Cancel* button to remove the information you have entered on this screen and return to the *UI Issues* tab of the individual's *Customer Detail* record without sending the issue.



4. The following fields will always be pre-populated: Name, Office Assigned, SSN, Reported By, UI Issue Type, and Date ES Reported. At this point you should fill in the remainder of the form. The following fields are required, but you should always fill in as much of the form as possible:
   - Description of Issue;
   - Is the claimant considered employable and suitable for referrals?;
   - Total # of documents sent.

   Click on the *Save* button to save the issue and send the e-form to the TCC e-mail address; or click on the *Reset* button to remove all of the information you have entered on this screen; or click on the *Cancel* button to remove all of the information you have entered on this screen and return to the previous screen without saving the UI issue.

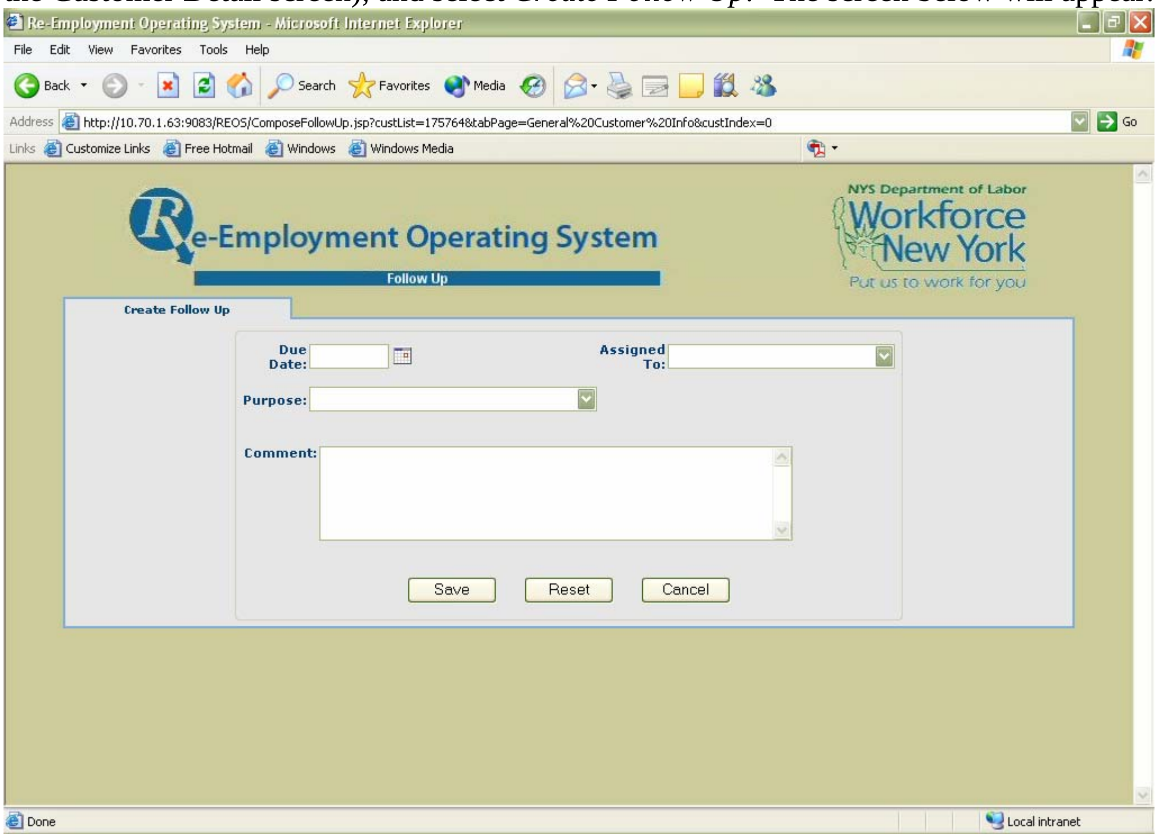
Follow Up Features

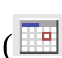
Important Information Regarding Follow Ups: Only follow ups for individuals assigned to the office you are currently signed into will appear on the *Follow Up* screen. Comments noted on the *Follow Up* screen will only be visible from the *Follow Up* screen. They will not appear on the *Activity* tab of the *Customer Detail Record*.

Create a Follow-Up(s)

Creating a follow up can only be initiated from the Search Results (Please refer to Section 3, Page 13) or Customer Detail screens (Please refer to Section 4, Page 1). **Please note**: The *Follow Up* button on the *Main Menu* only allows you to view, edit, remove and/or print follow ups.

1. Once you have selected the individual(s) you would like to create a follow up for, click on the *Follow Ups* button (If you initiated from the Search Results screen) or *Follow Up* button (If you initiated from the Customer Detail screen), and select *Create Follow Up*. The screen below will appear.



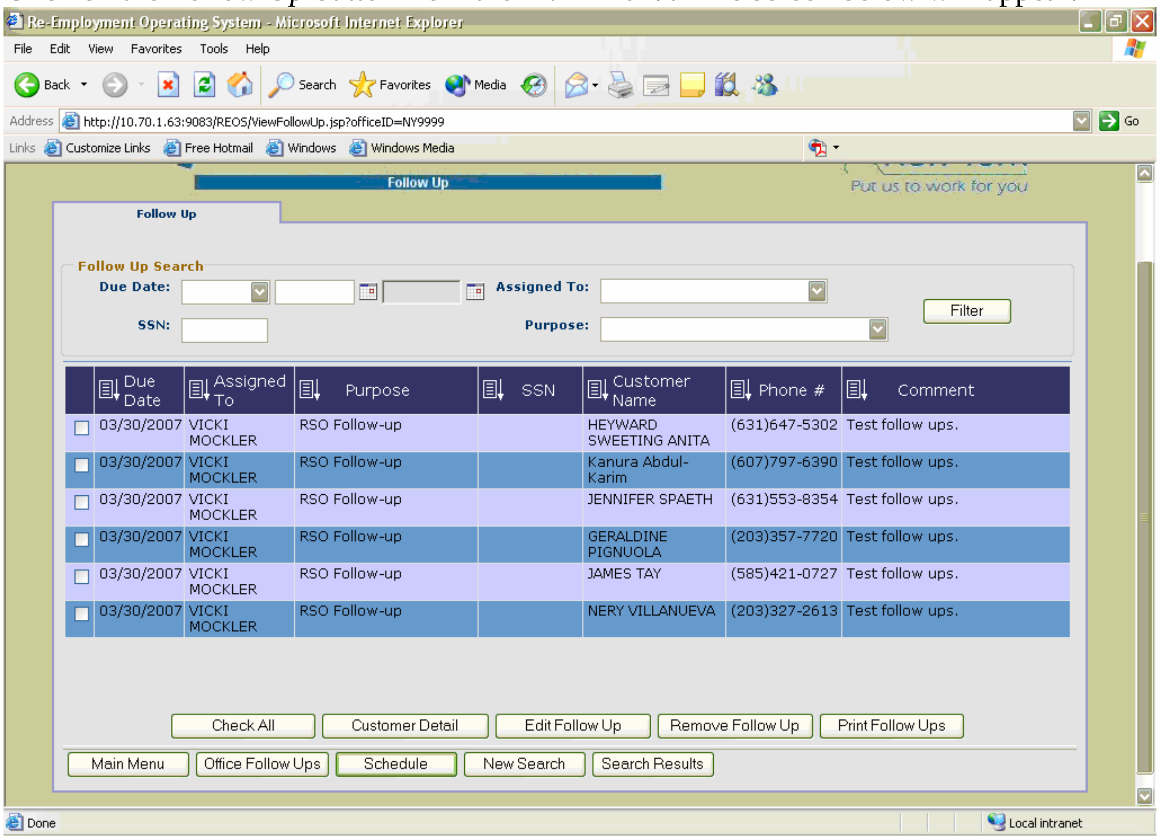
2. Click on the *Calendar* icon () next to *Due Date* and select a date from the calendar that appears.
3. Click on the *Assigned To* drop down box and select an option from the list provided.
4. Click on the *Purpose* drop down box and select a purpose from the list provided.
5. If you would like to place a comment for the follow up, type a comment in the space provided next to *Comment*. **Please note**: Comments should be as short as possible because the system will only allow comments to be two thousand (2,000) characters or less. Any comment will be visible to anyone that has access to the office you are currently signed into. Therefore, please make sure you use appropriate language only. Do not use profanity or derogatory statements when creating comments.
6. At this point you have the following options:
   - **Save** – This selection will save the follow up you created and will bring you to the *Follow Up* screen. **Please note**: Only the follow up(s) you created will be listed. If you wish to view all of the follow ups for the office you are signed into, click on the *Office Follow Ups* button. If you click on

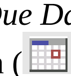
the *Search Results* button, you will be brought back to the screen you initiated the create follow up option from.

- **Reset** – This selection will remove everything you have entered on this screen.
- **Cancel** – This selection will remove everything you have entered on this screen and return you to the screen you initiated the create follow up option from, without saving the follow up.

Filter/View/Edit/Remove/Print Follow Up(s)

1. Click on the *Follow Up* button from the *Main Menu*. The screen below will appear.

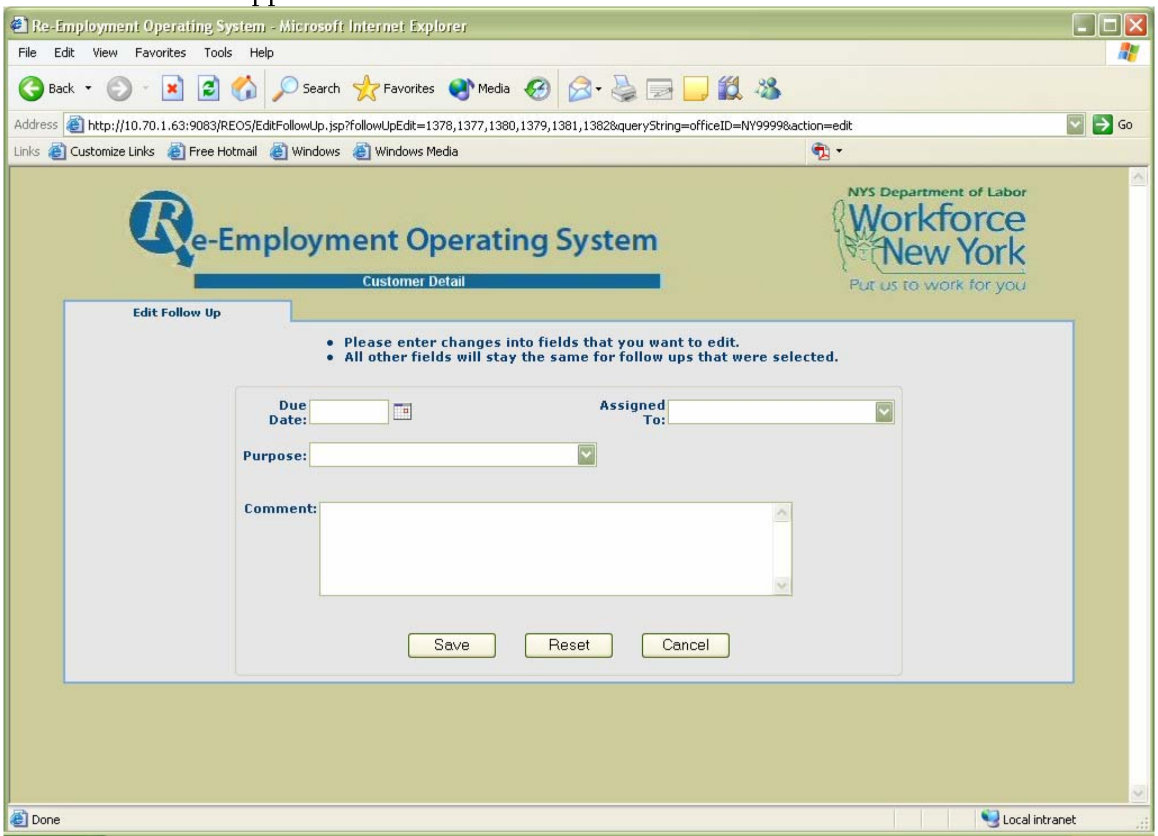


2. At this point you have the following options:
   - To filter the list of follow ups by any combination of the following fields:
     a. **Due Date** – Click on the *Due Date* drop down box and select an option from the list provided. Click on the *Calendar* icon () next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Due Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.
     b. **Assigned To** – Click on the *Assigned To* drop down box and select an option from the list provided.
     c. **SSN** – Type the individual's SSN into the space provided next to *SSN*. **Please note**: You do not need to enter the dashes, only the numerals.
     d. **Purpose** – Click on the *Purpose* drop down box and select a purpose from the list provided.

     Once you have entered your filter criteria, click on the *Filter* button and only follow ups that meet the filter criteria will be displayed.
   - To view an individual or group of individuals' customer detail record(s), select one or more individuals by clicking on the box in the first column for each individual you would like to view. (This will place a check mark in the box.) You can also click on the *Check All* button to select all of the individuals listed. (The button name will then change to *Uncheck All*.) If you click on the

Uncheck All button, it will remove the check marks for all of the individuals. Click on the *Customer Detail* button.

- To edit an individual's or group of individuals' follow up(s), select one or more individuals by clicking on the box in the first column for each individual you would like to edit. (This will place a check mark in the box.) You can also click on the *Check All* button to select all of the individuals listed. (The button name will then change to *Uncheck All*.) If you click on the *Uncheck All* button, it will remove the check marks for all of the individuals. Click on the *Edit Follow Up* button and the screen below will appear.



At this point you can update any of the following fields:

a. **Due Date –** Click on the *Due Date* drop down box and select an option from the list provided. Click on the *Calendar* icon () next to the first space provided and select the date from the calendar that appears. If you selected *Between* from the *Due Date* drop down box, you will need to click on the calendar to the right of the second space provided and select a date from the calendar that appears. This gives you the option of selecting a date range.
b. **Assigned To –** Click on the *Assigned To* drop down box and select an option from the list provided.
c. **Purpose –** Click on the *Purpose drop* down box and select a purpose from the list provided.
d. **Comment –** Type a comment in the space provided next to *Comment*. **Please note**: Comments should be as short as possible because the system will only allow comments to be two thousand (2,000) characters or less. Any comment will be visible to anyone that has access to the office you are currently signed into. Therefore, please make sure you use appropriate language only. Do not use profanity or derogatory statements when creating comments.

Once you have entered all of the changes, you can click on the *Save* button to save your changes and bring you to the *Follow Up* screen, or the *Reset* button to remove everything you have entered on this screen, or the *Cancel* button to remove everything you have entered on this screen and return you to the *Follow Up* screen.

- To remove an individual or group of individuals' follow up(s), select one or more individuals by clicking on the box in the first column for each individual you would like to remove the follow up. (This will place a check mark in the box.) You can also click on the *Check All* button to select all of the individuals listed. (The button name will then change to *Uncheck All*.) If you click on the *Uncheck All* button, it will remove the check marks for all of the individuals. Click on the *Remove Follow Up* button. A pop up message stating *Are you sure you want to remove Follow Up(s)?* will appear. If you click on the *OK* button, the follow up(s) will be permanently removed. If you click on the *Cancel* button, the follow up(s) will remain on the *Follow Up* screen.
- To print the list of follow ups for the office you are signed into, click on the *Print Follow Ups* button. A new window with a printable version of the list of follow ups will appear. This screen will display the due date, staff person assigned, purpose, the individual's SSN, individual's name, individual's phone number and comment for each follow up. To print this screen, click on the *Print* button. At this point you may change the printer settings, if necessary, and click *OK*. To close this window, click on the *Close Window* button.

Important Information: At any point when using the Follow Up screen you have the following buttons/options along the bottom of your screen:

Main Menu - This selection will bring you back to the *Main Menu*.

Office Follow Ups – This selection will refresh the *Follow Up* screen and show the entire list of follow ups for the office you are currently signed into. **Please note**: If the office you are currently signed into does not currently have any pending follow ups, a message stating *No Follow Ups Found* will be displayed.

Schedule – This selection allows you to schedule an individual(s) for an appointment by selecting one or more individuals by clicking on the box in the first column for each individual you would like to schedule. (This will place a check mark in the box.) You can also click on the *Check All* button to select all of the individuals listed. (The button name will then change to *Uncheck All*.) If you click on the *Uncheck All* button, it will remove the check marks for all of the individuals. Click on the *Schedule* button and select *Group* or *Individual*. The *Group Scheduling* or *Individual Scheduling* screen will now appear depending on your selection. Please refer to Section 7.

New Search – This selection will bring you to the search screens so you may create a search.

Search Results – This selection will return you to your search results. Please note: This button will only be available for use if you accessed the *Follow Up* screen from the *Search Results* screen.

Field Name	Source	Updated
599	UI	Daily Update
599 End Date	UI	Daily Update
Address	OSOS	Current Data (1 day lag)
Addt'l Claim Date	UI	Daily Update
BYE	UI	Initial Download
City	OSOS	Current Data (1 day lag)
County	OSOS	Current Data (1 day lag)
Education	OSOS	Current Data (1 day lag)
Eff. Claim Date	UI	Initial Download
Eff. Days Used	UI	Daily Update
Email	OSOS	Current Data (1 day lag)
First Name	OSOS	Current Data (1 day lag)
In Hearing	REOS	User Input
Last Cert. Date	UI	Daily Update
Last Name	OSOS	Current Data (1 day lag)
LWIA	OSOS	Initial Download
MI	OSOS	Current Data (1 day lag)
Migrate Date	UI	Initial Download
OSOS ID	OSOS	Initial Download
OSOS Job Seeker Status	OSOS	Current Data (1 day lag)
OSOS Status	OSOS	Current Data (1 day lag)
OSOS-Staff Assigned	OSOS	Initial Download
OSR	OSOS	Initial Download
Phone	OSOS	Current Data (1 day lag)
Primary Lang	UI	Initial Download
Profile Score	UI	Monday Morning
Profiled Date	UI	Monday Morning
Rapid Response	OSOS	Current Data (1 day lag)
Rapid Response Date	OSOS	Current Data (1 day lag)
Reopened Date	UI	Daily Update
REOS Create Date	REOS	Initial Download
REOS Status	UI	Daily Update
Reporting Office	OSOS	Initial Download
RTW Date	UI	Initial Download
SEAP	UI	Daily Update
Shared Work	UI	Daily Update
Sign Lang. Required	REOS	User Input
SSN	UI	Initial Download
State	OSOS	Current Data (1 day lag)
TAA Petition #	OSOS	Current Data (1 day lag)
TCC	UI	Daily Update
TLO	UI	Initial Download
UI Rate	UI	Initial Download
Union (PD)	UI	Initial Download
Union ID #	UI	Initial Download
Vet	OSOS	Current Data (1 day lag)
Vet Disabled	OSOS	Current Data (1 day lag)
Virtual Office	OSOS	Initial Download
Work Search Req	UI	Daily Update
Zip	OSOS	Current Data (1 day lag)

Field Name	*Source*	*Updated*
(Desired) Experience	OSOS	Current Data (1 day lag)
(Desired) OSOS Desired O*NET Title	OSOS	Current Data (1 day lag)
(Desired) Regional Demand Occ.	OSOS	Current Data (1 day lag)
(Desired) State Demand Occ.	OSOS	Current Data (1 day lag)
Calculated Exp. (months)	UI	Initial Download
City	UI	Initial Download
Demand Occupation	UI	Initial Download
Employer	UI	Initial Download
FEIN	UI	Initial Download
Last Day Worked	UI	Initial Download
NAICS	UI	Initial Download
O*NET Coded UI Job Title/Code	UI	Initial Download
Reason For Separation	UI	Initial Download
Salary $	REOS	User Input
Start Date	UI	Initial Download
State	UI	Initial Download
UI Job Title	UI	Initial Download
Salary Unit	REOS	User Input
Work Location	UI	Initial Download
Zip Code	UI	Initial Download

Initial Download	Originates from the Weekly Fill which runs on Friday mornings.
Daily Update	Fields are initialized by the Weekly Fill and then updated daily (Monday thru Friday mornings).
Current Data (1 day lag)	Information is not stored in REOS; originates from a copy of OSOS that is updated daily (Monday thru Friday mornings).
User Input	Initialized with a default value (typically 0 or NULL) during the Weeklky Fill; relys upon the REOS User to enter applicable values.