OSOS Data Correction Desk Guide

Data correction in OSOS requires a basic understanding of how data is entered. This guide is written with the assumption that the user performing the data correction is familiar with the data entry process. Data correction must only be performed by users with knowledge of both program and the data entry process. Removing L1 services on the Activities tab or L2 services from the Services tab require separate security permissions. Correcting WIA data requires Delete Partner Data permission. Removing activities in the Customer Detail module Supervisory Delete permission is required to.

The functional alignment of records in OSOS has added the elements of Labor Exchange (LEX), Workforce Investment Act (WIA), Trade Act (TAA), and / or possibly state funded programs into the Common Measures data entry correction process. For example, correcting WIA data may require Labor Exchange activities to be removed.

Note: it is critical for staff correcting data to communicate with other OSOS users who are working with customer. They can be identified on the Services module Service History tab and all users with basic permissions can view the Service History tab. If staff does not have contact information, send an email to OSHELP@labor.state.ny.us requesting contact information for individuals in other offices or areas that are working with the customer.

General Rules of OSOS Data Correction

- Coordinate data correction with other users listed in the Service History that entered services to the customer as part of the enrollment, because they may have to re-enter services that were temporarily removed during the correction process.
- The process is the opposite of data entry, but may now incorporate services from other programs such as Wagner / Peyser (LEX).
- Print out the Service History, or make screenshots or notes of all data, such as dates and outcomes, before removing.
- Most often funding only must be removed from L2 services in the Services module, and the services can remain in place.
- If UI Wage data is displayed on the Outcomes tab in the Employed in Quarter after Exit fields, it cannot be removed, but it should not impede the ability to correct the data.
- All adult, dislocated worker and Trade Act customers are normally allowed to automatically exit unless the customer is being removed from performance for one of the exclusion exit reasons, however, when correcting data, a temporarily removed exit reason can be returned after modifications have been made.

OSOS allows up to 20 customers to be searched at a time. On the Customer Search tab, enter SSNs or OSOS ID numbers, and click on Search. Then click on the selection check box for each customer, to navigate to the Customer Detail of the first record. Use the arrows in the upper right hand corner to navigate back and forth between records.

How to Delete an Activity from a Customer Record

Click the Activities tab. Highlight the appropriate activity by clicking on it, and then click the Delete Activity button. If the button is grayed out and not activated, it means the user does not have the appropriate permission (Supervisory Delete).

How to Delete a Job Referral from a Customer Record

Job Referrals must be deleted from the Activities tab.

How to Delete SS/IO Enrollment and Service

How to Change WIA Funding on a Functional Alignment Service

If the funding attached to a service in the Services module for a functionally aligned customer in incorrect, enter the customer's record and navigate to the Services tab.

1) Services Module, Enrollments and Outcomes tabs:

If the customer is exited, click on the Common Measures enrollment, remove any outcomes from the Outcomes tab, and the exit reason from the Enrollments tab, and save.

Click on the Customer Detail button and return to the Services module using the Services button, to refresh the data.

2) Services Module, Services tab:

Click on the service or services that must be changed, make sure the Planned End Date equals the Actual End Date (if not, copy and paste to overwrite the Planned End Date), remove the Actual End Date and save.

Click on the $1 in the Total Funding box and delete using the Delete button on the keyboard.

Click on the Add button and choose the appropriate funding source, and continue with the normal funding procedures.

How to Remove a WIA Enrollment and Services

1) Services module, Outcomes tab:

Click on the Services button and then the Outcomes tab.

Click on the Common Measures enrollment and make any fields with data blank and save. *Be sure to include the WIA Youth (14-21) button for youth records.*

2) Services module, Enrollments tab:

Click on the Common Measures enrollment to activate fields.

Remove Exit Reason and save.

Go to Customer Detail and back to the Services module to refresh.

3) Services module, Services tab – for all services:

Make the Completed drop-down blank.

Remove the Actual End Date and save.

Remove the $1 from the Total Funding field.

Remove the funding source (above Total Funding - highlight and click on Delete button below) and save.

<u>Shortcut: you can modify all services at once and save once if within the same enrollment</u>.

4) Click on Customer Detail and return to Services to refresh data.

5) Services module, Services tab – for all services:

Click on each service to highlight and then the Delete Service button.

A popup will appear asking “Are you sure you want to delete the selected service?”

Click on OK and save.

<u>Shortcut: you can do all services at once and save once if within the same enrollment</u>.

6) Click on Customer Detail and return to Services to refresh data.

7) Services module, Agency Info tab:

Click on Agency (WAE) to activate fields.

Click the Delete Agency button.

A popup will appear asking “Are you sure you want to delete the selected agency?”

Click on OK and save.

8) Click on Customer Detail, and the arrow at the top right of the screen to access records for additional customers.

<u>How to Remove a Common Measures Enrollment</u>

A Common Measures or WIA enrollment may need to be removed. For example, there may be duplicate enrollments that need to be combined into one enrollment.

Follow steps 1 through 4 above (***How to Remove a WIA Enrollment and Services***), for the most recent enrollment.

Navigate back to the Services module and check the Enrollments tab to insure the removal of the most recent enrollment.

How to Correct a Duplicate Enrollment

Follow steps 1 through 4 above for the most recent enrollment.

Navigate back to the Services module and check the Enrollments tab to insure the removal of the most recent enrollment.

Click on the next chronological Common Measures enrollment (that needs to be combined with the enrollment just removed), and delete the Exit Reason.

Save and click on Customer Detail, and then click on the Services button to return to the Services module and refresh the data.
Re-fund all the services, return the Actual End Dates, and return data to the Completed drop-down fields, and save.

Click on the Enrollments tab to either manually re-exit the customer using the ***Exited after 90 days*** reason if outcomes must be re-entered, or allow the overnight batch to perform the exit.

Return any outcomes that were removed and save.

How to Correct a Multi-WIB Enrolled Record

Multi-WIB enrollments require communication and cooperation in order to coordinate services to shared customers. It will require identifying other staff from NYSDOL and / or LWIAs working with the customer.

It is most important that other OSOS user's data not be removed or modified without their knowledge and consent. Changes to data can be tracked.

Please make all effort to contact the other staff person directly. All One Stops are listed on the Workforce New York website (http://www.workforcenewyork.org - Find Your Local One Stop hyperlink). As a last resort, if a phone number is not available contact NYSDOL Workforce Development & Training OAMI Unit, which maintains phone numbers of OSOS security coordinators and all users.

Access the record as described above and navigate to the Services module.

1) On the Agency Info and Service history tabs: determine the LWIA and most recent staff people working with the customer.

Agency Info tab tells which LWIA(s) and / or the NYS Department of Labor.

Service History tab will identify the staff people. Click on any gray column header to sort.

2) Contact the staff person most recently working with the customer to coordinate services and determine when corrections will be made.

3) Scenario One: if enrollment is <u>not</u> exited.

If the customer's enrollment is not exited, determine which staff person is working with the customer and contact them to coordinate services.

Make the customer active in the appropriate agency (WAE on the Agency Info tab), if necessary.

Enter services as necessary.

4) Scenario Two: if an exited enrollment must be re-opened so another LWIA can enter services.

Contact the most recent staff person working with the customer from the other office(s) to coordinate the data correction of the record. Allow enough time in the day for the data correction to be made and still avoid the overnight 90 days soft exit.

Enter customer record and navigate to Services module, Outcomes tab.

If there are any entries, make a note of and then remove any outcomes.

Remove an O*Net entry by clicking on O*Net Titles button, then click on the Cancel button.

Click on Enrollments tab and highlight the appropriate Common Measures enrollment at the bottom of the screen to activate the fields.

Remove the exit reason and save.

Contact the other LWIA to inform them the services can be entered ****that day*** and that they should contact you when data has been entered.

Re-enter exit reason, if applicable.

Enter Outcome information, if applicable, and save.

**** If services are not entered the same day that an exited customer record is un-exited, the overnight batch run will conduct a 90 day soft exit. If the situation arises where all***

the corrections cannot be made on the same day, remove the enrollment exit reason and the Actual End Date of the most recently entered service, and save. This will prevent the 90 day exit, however, <u>do not forget to complete the data correction and replace the Actual End Date</u>.

5) Scenario Three: if another LWIA needs to un-exit an enrollment so you can enter services.

Follow steps 1 and 2 above.

Call the staff person in the other LWIA to coordinate services and if the record is exited, ask them to un-exit the record using the method described above and call back when completed.

Enter services data the same day and save.

Inform the other area on the same day that the data entry is completed, so they can return the exit data any removed outcomes data to the Outcomes tab

<u>How to Correct a 90 Day Gap</u>

A requirement of the Workforce Investment Act (WIA) is that customers receive at minimum a service every 90 days or the customer should be exited from the program. If a customer is receiving services according to the WIA, an effective program design and timely data entry will prevent 90 day gaps in services in OSOS or unwanted 90 day automatic exits.

On the evening of the 90th day from the Actual Start Date of a service, OSOS customer records that have not had additional services entered into the system fall subject to the 90 day automatic exit rule.

The record will be exited if all service Actual End Dates had been entered into the Services module. If there is a missing Actual End Date, OSOS will provide a message to the next OSOS user adding a Level 2 service to the file that there is a 90 day gap in services.

To determine gaps in the Services module, use the Service History tab and click on the Date column to sort the data into chronological order. Examine the dates of the services.

Exclude administrative activities entered by NYS Department of Labor, such as "Active Job Seeker Beginning of Period," or “Labor Exchange Enrollment,” “WIA Enrollment” or “Common Measures Enrollment,” because they are indicators of batch jobs, which NYSDOL enters into records as routine database updates are performed, or as a result of creating or exiting enrollments.

A calendar may be useful to count out the 90 days and be sure to include weekends.

Note: keep in mind that some months have more or less than 30 days. Following are instructions for filling in gaps in service in the Services module.

Make screenshots or notes of all dates and outcomes in OSOS before removing.

1) On the Services module, Enrollments tab: if a customer is not exited, proceed to number 3) below.

If the customer has been exited, click on the Services module, Outcomes tab.

Make a note or screenshots of outcomes to be re-entered after the corrections are made.

Make all fields blank (including O*Net title - click on O*Net Titles button, then cancel) and save

2) On the Enrollments tab: click on the appropriate Common Measures enrollment at the bottom of the screen.

Make the Exit Reason blank and save.

Click on the Customer Detail button, and then the Services button, to refresh the Services module.

3) Click on the Services tab and for all services <u>except</u> the enrolling service (Determine the enrolling service on the Enrollments tab, upper left corner of the screen).

Make the Completed drop-down field blank.

Make sure the Planned End Date field contains the same date as the Actual End Date field, and then delete the Actual End Date

Remove the $1 from the Total Funding field

Remove the funding source (click on the funding source just above the Total Funding field - use the Delete button)

Click on OK and save.

4) Add supportable services, which meet validation requirements, to fill in the gap or gaps.

5) Re-fund all the unfunded services and save.

Shortcut: fund all of the services at once and save once.

6) Add the Actual End Dates (shortcut: copy and paste from Planned End Date) and fill out the Completed drop-down field, and save.

Shortcut: add all of the dates and the Completed drop-down field at once and save once.

7) If the customer needs to be re-exited as Exited after 90 days, on the Enrollments tab, return the Exit Reason and save.

8) If the customer had outcomes on the Outcomes tab, re-enter the Outcomes and save.

Message that "No Seats Available For This Service"

On older service offerings: search for the offering in the provider module, find the correct offering and click to highlight, and then click the Detail button. Remove numbers from Total Seats and Available Seats fields, and click Save Single.