

Level 1: Service Definitions and Data Entry Procedures

L1 – Disability Employment Initiative Specific Services			
Enrolling	Service	Definition	Guidance
	DEI – Disability Employment Initiative		
Yes	Beneficiary Outreach Workshops	To record customer participation in a Beneficiary Outreach Workshop conducted by certified Benefits Advisors. Information is provided to SSA Disability Beneficiaries about the work incentives including the Ticket to Work program and services available through the NY Employment Services System’s Administrative Employment Network (NYESS TTW).	In COMMENTS, record notes about applicable individual case management if provided and next steps/referrals that were established for the customer(s) if applicable. Use the SENSE model or comparable to organize comments.
Yes	Benefits and Work Incentive Advisement - Development of Benefits Advisement Reports	Recorded by Certified Benefits Advisors to indicate activities related to the development of Benefits Advisement Reports based on specific data requested from SSA for the individual. Individuals who receive either Supplemental Security Income (SSI), and/or Social Security Disability Insurance (SSDI) require specific guidance from Certified Benefits Planners.	No COMMENTS required.
Yes	Benefits and Work Incentive Advisement – Pre-employment Follow Up	Recorded by Certified Benefits Planners to indicate activities related to follow-up advisement (long-term support) have been provided. Examples of long-term supports include, but are not limited to: assistance in implementing work incentives such as SSA’s Plan to Achieve Self Support (PASS), Impairment-Related Work Expenses (IRWE), Blind Work Expenses (BWE), or work subsidies, reviewing SSA documents with customers or conducting customer specific research with local SSA offices.	In COMMENTS, indicate any relevant case notes, including the specific activities completed, outcome(s) of the advisement and next steps/referrals that were established for the customer.

		<p>Pre-employment follow-up advisement may occur at key intervals, such as:</p> <ol style="list-style-type: none"> 1. when individual would benefit from Asset Development strategies which compliment long-term goals 2. anytime a beneficiary has specific letters from SSA that requirement explanation, research, and/or advisement <p>Individuals who receive either Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI) require specific guidance from Certified Benefits Planners.</p>	
No	Benefits and Work Incentive Advisement – Post-Employment Follow Up	<p>Recorded by Certified Benefits Planners to indicate activities related to follow-up advisement (long-term support) have been provided. Examples of long-term supports include, but is not limited to: assistance in implementing work incentives such as SSA’s Plan to Achieve Self Support (PASS), Impairment-Related Work Expenses (IRWE), Blind Work Expenses (BWE), or work subsidies, reviewing SSA documents with customers, conducting customer specific research with local SSA offices</p> <p>Post-employment follow-up advisement may occur at key intervals, such as:</p> <ol style="list-style-type: none"> 1. when employment is secured 2. when close to completion of Trial Work Period 	In COMMENTS, indicate any relevant case notes, including the specific activities completed, outcome(s) of the advisement and any next steps/referrals that were established for the customer.

		<ol style="list-style-type: none"> 3. when close to completion of Extended Period of Eligibility 4. when individual exceeds the Break-Even Point (for SSI) 5. when individual would benefit from Asset Development strategies which compliment long-term goals 6. when individual is expected to be terminated from employment 7. anytime a beneficiary has specific letters from SSA that requirement explanation, research, and/or advisement <p>Individuals who receive either Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI) require specific guidance from Certified Benefits Planners.</p>	
Yes	Benefits and Work Incentive Advisement – Initial Intake and Basic Review	<p>Recorded by Certified Benefits Planners to indicate provision of intake advisement in conjunction with a basic overview of SSA benefits and work incentives to individuals who receive either Supplemental Security Income (SSI), and/or Social Security Disability Insurance (SSDI).</p> <p>Benefits and Work Incentives Advisement is not a one-time need, rather, this is a service that will occur at key intervals during the period of time you are providing services to a SSA Disability beneficiary.</p>	In COMMENTS, indicate any relevant case notes, including the outcome(s) of the advisement and what next steps/referrals were established for the customer
Yes	Integrated Resource Team (IRT) Implementation	Recorded when the Disability Resource Coordinator (DRC) organizes an integrated resource team to coordinate enhanced services with internal and external partners. The IRT activity is recorded when actual engagement of IRT members takes place (e.g., face-to-face	In COMMENTS, record the names of the other internal and external partners that participated in the IRT activity, as well as what steps were taken by the IRT to assist with the customer’s service plan, and any

		meeting, conference call, video conference, etc.) IRTs consist of multiple partners working together, in a coordinated fashion, towards the customer’s desired employment goal defined in the customer’s service plan. Financial and/or staffing commitments are provided by members of the IRT for the benefit of impacted customers.	follow up to be provided by each partner.
--	--	---	---

L1 – SELF-SERVICE/INFORMATIONAL ONLY

Enrolling	Service	Definition	Guidance
	Informational/Self-Service		
Yes	Self-Service / Information Only	To record that a job seeker accessed workforce information using self-service tools/applications . Workforce information may be delivered using a variety of methods including web-based applications, PC applications, or printed materials This service may also be used to record information only activities, such as a general overview of the services available in the One Stop Center, including labor market information. **The service must be initiated by the customer; unsolicited correspondence to a customer is not considered a self-service.	COMMENTS should detail the information accessed. Note: No staff assistance should be provided other than general instruction on how to use/access the self-service tools. If the workforce information services provided go beyond these parameters, then the service should be recorded under L1 Core (Staff Assisted).

L1 – Staff Assisted Core

Enrolling	Service	Definition	Guidance
	Assessment		
Yes	Assessment Interview, Initial Assessment	To collect and analyze information on a job seeker’s educational level, work history, employment barriers, employment goal and occupational knowledge, skill and ability to determine the job seeker’s likely employment opportunities in the local labor market (or in a	In COMMENTS, indicate any next steps/referrals that were arranged. Record Initial Assessment outcome (JSRS or CDS) at the time assessment is conducted.

		<p>labor market to which he/she is willing to relocate), which services are needed, and whether any referrals are appropriate. Factors that may be taken into consideration include:</p> <ul style="list-style-type: none"> a. Prevailing local labor market conditions, including the unemployment rate, local employer skill demands and hiring prerequisites; b. Transferable skills that the job seeker may possess that would be of interest to other local employers. 	<p>Veterans determined to be in need of career development services should be assigned a veteran program case manager to ensure the services are coordinated.</p>
Counseling			
Yes	Career Guidance - Core	The provision of information, materials, suggestions, or advice which are intended to assist the job seeker in making occupational or career (vocational) decisions.	In COMMENTS, indicate pertinent details of guidance provided and/or career objectives discussed.
Job Search Assistance			
Yes	Bonding Assistance	To record that the job seeker has been provided Federal Bonding coverage in order to start a job for which bonding is required and the employer's bonding company will not provide coverage.	In COMMENTS, indicate the employer and the date the job seeker will start work.
Yes	Employer Outreach for Individual Customer with Disability	<p>To record when staff contacts an employer in an effort to assist in accessing opportunities for employment. This outreach is conducted on behalf of customers with disabilities who have already, or who are willing to disclose their disabilities.</p> <p>Employer outreach activities include assisting employers in understanding tax incentives such as Work Opportunity Tax Credit (WOTC) and Worker's with Disabilities Employment Tax Credit (WETC).</p>	In COMMENTS, record the name of the employer that was contacted and what the outcome of the outreach activity was, as well as any next steps both the staff and the employer will take on behalf of the customer, if any.

		Workforce staff assistance should include providing information to the employer concerning who is eligible to apply and what is required of employers who are eligible to apply. Employers should be directed to applicable forms located on the NYSDOL website.	
Yes	Identification of Resources to Support Job Placement	<p>To record when staff have identified resources in order to support job placement for customers with a disability.</p> <p>Resources include the Medicaid Buy-In Program for Working People with Disabilities (MBI), SSA’s Plan to Achieve Self-Support (PASS), and local resources which assist customers with disabilities in accessing or maintaining employment.</p>	In COMMENTS, record any resources identified and/or applications submitted.
Yes	Job Accommodation Assistance	<p>To record activities associated with assisting a customer with a disability, <i>returning to work</i> or currently employed, on matters involving workplace accommodations.</p> <p>Examples of applicable Job Accommodation Assistance activities include:</p> <ol style="list-style-type: none"> 1. provide guidance to the customer on the proper way to disclose a disability to an employer 2. provide guidance to the customer on how to effectively make a request for a reasonable accommodation to an employer 3. provide guidance to an employer (on behalf of a customer) regarding the Americans with Disabilities Act and employer responsibility regarding reasonable accommodations 4. provide guidance to a customer and their 	In COMMENTS, indicate what type(s) of guidance was provided and to whom the guidance was provided (e.g., job seeker, employer, etc.). Describe any related outcome(s) and/or next step(s).

		employer regarding Assistive Technology products available to support continued employment	
Yes	Job Development Contact	To record that a telephone or other personal contact to an employer was made on behalf of the job seeker when no suitable job order/opening is currently on file.	In COMMENTS, identify the employers that were contacted and any resulting referrals.
Yes	Job Finding Club	To record that the job seeker participated in a Job Finding Club. A Job Finding Club is an organized activity including a period of structured application where participants attempt to find jobs. It encompasses all of the elements of a <i>Job Search Workshop</i> (see separate definition), plus a one- to two-week period of structured, supervised group activity where participants attempt to obtain jobs.	This service can be recorded for each day the job seeker participates. Note any special occurrences (e.g., job interview with XYZ company scheduled for 8/9/08)
Yes	Job Search Planning	To record that the job seeker received services designed to assist in developing their job search skills so that they can obtain employment. Such assistance can include, but is not limited to: developing a work search plan, interviewing advice, conducting a mock interview, discussing how applicant felt he/she did after an interview, compiling a portfolio of important information for job search activities, showing the applicant how to maintain a record of his/her job efforts, or providing any other advice that would expedite or improve the seeker's job search.	In COMMENTS, indicate the specific services provided.

Yes	Job Search Workshop	To record that the job seeker participated in a Job Search Workshop. A Job Search Workshop provides job seekers with knowledge that will enable them to find jobs. It is an organized activity that provides instructions on subjects including, but not limited to, labor market information, finding job openings/leads, creating a job search plan/strategy, applying for jobs, techniques to maximize job search, expressing or identifying accomplishments, finding resources and getting assistance while searching for a job.	No COMMENT required
Yes	Career Exploration Workshop	To record that the job seeker participated in a workshop focusing on learning the career exploration process, identifying resources to further their career exploration; and outlining the next steps of their career exploration process.	No COMMENT required
Yes	Interviewing Workshop	To record that the job seeker participated in an organized activity that provided instructions and exercises on the following: the purpose of an interview, how to prepare for an interview, types of interviews, how to respond to different interview questions, how to research the company, corporation, or employer prior to an interview, how to describe strengths and skills, how to deal with nerves and anxiety prior/during an interview, dress for success, verbal and non-verbal communication cues, interviewing mistakes, ending an interview and thank you notes and follow-up e-mails.	No COMMENT required
Yes	Networking Workshop	To record that the job seeker participated in an organized activity that provided instructions and exercises on; using social media tools to network, the benefits of networking, different types of networks and recognize existing networks, how to build a networking contact list, how to contact	No COMMENT required

		individuals on their networking list, how to maintain a list of contacts, how to plan, schedule, and conduct an informational interview, career networking tips and tricks, most common networking mistakes, and strategies to market themselves better during networking opportunities.	
Yes	Transferable Skills Workshop	To record that the job seeker participated in an organized activity that provided instructions and exercises on the following: identifying transferable skills, identifying resources to aid in identifying transferable skills, using identified transferable skills to explore potential occupations, how to market transferable skills on a resume, cover letter and in an interview.	No COMMENT required
Yes	Workshop (Other)	To record that the job seeker participated in an organized activity that provided instructions and exercises on a specific topic to support their job search efforts.	Record the name of the workshop and a brief description of the content/purpose of the workshop
Yes	Resume Preparation Assistance	To record that staff provided one of the following: <ul style="list-style-type: none"> • Information to a job seeker on the various formats and the type of content considered appropriate in resumes and cover letters. • Assisted a customer with writing a resume. • Critiqued customer's resume and provided feedback. • Reviewed the customer's resume to assess the competitiveness of the resume to the customer's job market. 	No specific content documentation required. Note: Record whichever of the two (but not both) of the resume-related services available in OSOS (Resume Preparation Assistance or Resume Writing Workshop) that best describes the activity provided.
Yes	Resume Writing Workshop	To record that the job seeker participated in an organized group setting activity that provided instruction on resume writing, on the content and format of resumes and cover letters, and provided general instructions to aid in the development and production of an individual resume..	Note: Record whichever of the two (but not both) of the resume-related services available in OSOS (Resume Preparation Assistance or Resume Writing Workshop) that best describes the activity provided.

			The Resume Writing Workshop activity is intended for use when providing resume information/instruction of a very general nature, not individualized information/instruction
Yes	Transition Assistance Program Workshop (TAP)	To record services delivered during the three-day job search workshop provided to transitioning service members and their spouses at one of four military installations in New York State.	No COMMENTS required.
Yes	Workforce Information Services Staff Assisted (LMI)	<p>To record when staff provides a job seeker with workforce information services. This activity should be recorded only when the activity reflects significant staff time invested in giving the job seeker specific information in relation to their questions or individual needs. Staff assisted workforce information services may include, but are not limited to, information on the following:</p> <ul style="list-style-type: none"> • Labor market conditions • Industries, occupations and characteristics of the workforce • Area business-identified skill needs • Employer wage and benefit trends • Short- and long-term industry and occupational projections • Worker supply and demand info • High-growth and high-demand industries • Business turnover and new hire rates 	<p>In COMMENTS, indicate the specific type of LMI information provided to the job seeker.</p> <p>Note: This service must represent more staff effort than just providing the customer with basic information or direction. The following types of activities do not meet the definition: providing information on how to use Resource Room or Internet tools to research/find LMI; simply handing out readily available LMI brochures or publications with no further explanation, providing general information about upcoming recruitments/job fairs, or providing information about Civil Service exams or Federal employment opportunities.</p>
	Orientation		
Yes	Orientation (Other)	To record that the job seeker was provided information on the array of services available in the Workforce system so that the individual can decide which services meet their needs. This is a	No COMMENTS required

		core service.	
Yes	Orientation (Rapid Response)	<p><i>Provided the core elements the Rapid Response Orientation as detailed in the Rapid Response Guidance Letter:</i></p> <ol style="list-style-type: none"> 1. Review of Rapid Response Customer Application and Information Surveys for each participating affected worker (used to register workers in OSOS) 2. Orientation to services provided at the local One-Stop 3. Collection of resumes for follow up 4. Provision of Labor Market Information, including relevant job openings 5. Provision of UI information and how to apply for benefits 6. Access to information regarding entrepreneurship and starting a business 7. Information on the UI Section 599 program 	In COMMENTS detail any of the customized elements provided to worker group as defined in the Rapid Response Guidance Letter
Yes	Orientation (Self Employment Program)	To record that the job seeker participated in an orientation provided to those UI claimants who are applying to participate in the NYS Self-Employment Program offered by the UI Division.	No COMMENTS required.

Yes	Orientation (UI Profiling)	To record that the job seeker was provided information about services available to those UI claimants identified as likely to exhaust through the federal UI profiling process.	<p>Record this activity only for UI profiling orientations conducted separately.</p> <p>No COMMENTS required.</p> <p>Note: UI Profiling Orientation information can be delivered as part of the Reemployment Services Orientation (RSO), rather than scheduling/conducting separate UI Profiling orientations.</p> <p>If the UI profiling information is combined as part of the RSO process, there is no need to separately record the Orientation (UI Profiling) service as long as the Orientation (UI Reemployment Services) service is recorded.</p>
Yes	Orientation (UI Reemployment Service)	To record that the UI claimant attended a scheduled Reemployment Services Orientation (RSO).	No COMMENTS required.
Referred to Job			
Yes	External Job Referral	To record that staff identified and referred the customer to an outside job listing (a job opening that was not listed in the New York Job Bank, AJE or its successor) based on the customer's qualifications and experience as compared to the listed job requirements.	In COMMENTS, indicate the specifics of the outside job referral, provide details describing the specific job opening (employer, title, salary) and source of posting (newspaper, web address).
Tax Credit Eligibility Determination			
Yes	Tax Credit Eligibility Determination	To record that a job seeker meets a tax credit eligibility requirement and has been either pre-screened or pre-qualified for the program.	If pre-screened or pre-qualified record this credit and document the employer's name in COMMENTS.

L1 – Staff Assisted Intensive			
NOTE: WIA funds may not be used to provide intensive services to employed individuals unless these individuals have been determined to have an income below the LWIA’s self-sufficiency standard. Employed individuals whose income exceeds the local area’s standard may receive intensive services funded by W-P funds. In such cases, an OSOS Comment must be recorded stating that the intensive service is being funded by W-P program funds Only.			
Enrolling	Service	Definition	Guidance
Assessment			
Yes	L1 Assessment – Comprehensive and Specialized Skill Levels/Service Needs	To record that the job seeker received a comprehensive and/or specialized assessment of his/her barriers to employment, occupational goal, along with the occupational knowledge, skills and abilities associated with that goal, and service needs. This service may include interpreting the results of assessment tools as well as in-depth interviewing and evaluation to identify employment barriers and appropriate employment goals. Comprehensive assessment is usually conducted after an initial assessment has taken place.	In COMMENTS, Identify the assessment instrument used (interview, ability profiler) and a summary statement that details the delivery, outcome and interpretation.
Counseling			
Yes	Career Guidance – Intensive	The provision of information, materials, suggestions, or advice which are intended to assist the job seeker in making occupational or career (vocational) decisions. Staff expends a significant amount of time and effort in helping the job seeker to analyze and understand the career information, identifying additional materials or information as necessary to help the job seeker refine his/her career goal.	In COMMENTS, detail the significant factors of the career guidance. Use the SENSE model or comparable to organize session notes.
Yes	Counseling – Individual	To record that the job seeker participated in a one-on-one counseling session with a professional counselor. The purpose of such session(s), whether one time only or on an ongoing basis, is to aid job seekers to gain a better understanding of	In COMMENTS, detail the significant factors of the career guidance. Use the SENSE model or comparable to organize session notes.

		themselves using information gained through various assessment tools and/or strategies so that they can more realistically choose or change their occupations, or make suitable job adjustments.	
Yes	Counseling- Group	To record that the job seeker participated in a group counseling session with a professional counselor. The purpose of such session(s), whether one time only or on an ongoing basis, is to aid job seekers to gain a better understanding of themselves using information gained through various assessment tools and/or strategies so that they can more realistically choose or change their occupations, or make suitable job adjustments.	In COMMENTS, detail the significant factors of the career guidance. Use the SENSE model or comparable to organize session notes.
Individual Employment Plan			
Yes	Individual Employment Plan	<p>To record that the job seeker and staff have identified the employment goals, appropriate achievement objectives (which may include education or training), and appropriate combination of services for the job seeker to achieve their employment goals.</p> <p>The IEP should include the necessary steps and timetables to achieve employment in a specific occupation, industry, and/geographic area.</p>	<p>In COMMENTS, briefly describe the IEP including the goal and steps to achieve.</p> <p>This service is appropriate for job seekers needing a long-term plan. A more immediate, short-term work search plan should be considered Job Search Planning (a staff assisted core service).</p>
Short-term Pre-Vocational Skills			
Yes	Short-term Pre-vocational Skills to Prepare for Employment or Training	To record that the job seeker has participated in a short term service to develop his/her learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct, in preparation for unsubsidized employment or training. In addition, a short-term service to develop the participant's vocational or job readiness skills for training or employment would be skills development services.	Enter the name of the pre-vocational session and its beginning and ending dates in COMMENTS. At a minimum, you should record the service on the date the customer started, as well as on the date the session ended or the customer stopped attending to ensure participation is properly extended.
Testing			

Yes	Test Administration	To record that a job seeker took a test or used an assessment tool to help identify skills, aptitudes, interests, or other relevant information related to career decision making.	The test type and results should be entered under the Test Tab in Customer Detail. In COMMENTS detail the administration and interpretation of the test administration.
-----	---------------------	--	--

L1 STATE SPECIFIC

599 see separate document at (insert hyperlink)

Enrolling	Service	Definition	Guidance
	Customer Engagement Model		
No	1st Customer Engagement Appt Completed	To record that the customer attended the 1 st Customer Engagement Appointment and received the assistance as detailed in the C3E guide	<p>Record activities for each service provided during the appointment:</p> <ul style="list-style-type: none"> ✓ Assessment Interview, Initial Assessment ✓ Initial Assessment Outcome ✓ Workforce Information Services Staff Assisted LMI ✓ Resume Preparation Assistance ✓ Customer Subscribed to SMART ✓ External Job <p>In COMMENTS record:</p> <ul style="list-style-type: none"> • the salient details of the IA that justify the determination of JSRS or CDS and detail next steps and referrals • the specific LMI provided • details of the external job referral if provided (employer, title, salary and

			<p>source of posting)other salient details of the interview.</p> <p>Use the SENSE model or comparable to organize comment.</p>
No	2nd Customer Engagement Appt Completed	To record that the customer attended the 2 nd Customer Engagement Appointment and received the assistance as detailed in the C3E guide	<p>Record activities for each service provided during the appointment</p> <p>In COMMENTS record:</p> <ul style="list-style-type: none"> • Salient details of interview • Specific services provided • Work search issue that prompted the need for a Work Search Plan <p>Use the SENSE model or comparable to organize comment.</p>
No	3 rd Customer Engagement Appt Completed	To record that the customer attended the 3 rd C3E appointment and received the assistance as detailed in the C3E guide	<p>Record activities for each service provided during the appointment</p> <p>In COMMENTS record:</p> <ul style="list-style-type: none"> • Salient details of interview • Specific services provided • Work search issue that prompted the need for a Work Search Plan <p>Use the SENSE model or comparable to organize comment.</p>
No	1 st Group Customer Engagement Appt Completed	To record that the customer attended the 1 st in a series of C3E appointments and received assistance as detailed in the C3E guide.	Record activities for each service provided during the appointment
No	2 nd Group Customer Engagement Appt Completed	To record that the customer attended the 2 nd in a series of C3E appointments and received assistance as detailed in the C3E guide.	Record activities for each service provided during the appointment
No	3 rd Group Customer Engagement	To record that the customer attended the 3 rd in a	Record activities for each service

	Appt Completed	series of C3E appointments and received assistance as detailed in the C3E guide.	provided during the appointment
Green Jobs Green New York			
No	GJGNY – Referred to One Stop by Building Contractor (Employer)	Green Jobs Green New York program- customer referred to the Career Center by an employer	In COMMENTS, indicate the details of the referral if known
No	GJGNY – Referred to One Stop by CBO	Green Jobs Green New York program- customer referred to the Career Center by a Community Based Organization (CB)	In COMMENTS, indicate the details of the referral if known
No	GJGNY – Referred to One Stop by Training Provider	Green Jobs Green New York program- customer referred to the Career Center by a Training Provider.	In COMMENTS, indicate the details of the referral if known
Initial Assessment Outcome			
No	Job Search Ready Services (JSRS) – IA Outcome	Record this outcome subsequent to providing an Assessment Interview / Initial Assessment service to a customer if the customer has appropriate skills for beginning their job search. Customer is still eligible to receive additional services.	Cross reference with IA activity. In COMMENTS document the factors that lead to the JSRS determination. Detail customers next step plan.
No	Career Development Services (CDS) – IA Outcome	Record this outcome subsequent to providing an Assessment Interview / Initial Assessment service to a customer if the customer does not have necessary skills for beginning a job search and/or lacks skills to keep a job or has significant barriers impeding job search. Customer should be scheduled for additional services.	Cross reference with IA activity. In COMMENTS document the factors that lead to the CDS determination. Detail customers next step plan.
Language Assistance			
No	Bilingual Staff (Staff Assisted)	Record if the customer received Staff Assisted Bilingual Language Assistance	Primary Language Tab must be completed No COMMENTS required
No	Telephone Interpreter (Via Vendor)	Record if the customer received Language Assistance by a Telephone Interpreter (Via Vendor)	Primary Language Tab must be completed

			No COMMENTS required
No	Language Bank Staff (Volunteer Staff)	Record if the customer received Language Assistance by a Language Bank Staff (Volunteer Staff)	Primary Language Tab must be completed No COMMENTS required
No	In-Person Interpreter (Via Vendor)	Record if the customer received Language Assistance by an In-Person Interpreter	Primary Language Tab must be completed No COMMENTS required
No	Community Volunteer	Record if the customer received Language Assistance by a Community Volunteer	Primary Language Tab must be completed No COMMENTS required
No	Sign Language	Record if the customer received Language Assistance by a Sign Language	Primary Language Tab must be completed No COMMENTS required
No	Language Assistance Waived	Record if the customer waived Language Assistance	No COMMENTS required
No	Documents Translated Upon Request	Record if non vital documents were translated by staff and provided to the customer	Primary Language Tab must be completed No COMMENTS required
No	Vital Document- Career Center Registration form	Record if staff provided the customer with a translated registration form, such as the ES 100 or 101	Primary Language Tab must be completed No COMMENTS required
No	Vital Document-DEOD 834 Complaint form	Record if staff provided the customer with a translated Complaint form	Primary Language Tab must be completed No COMMENTS required
No	Vital Document- WS1 UI Eligibility Questionnaire	Record if staff provided the customer with a translated WS1 form per the REA program	Primary Language Tab must be completed No COMMENTS required

No	Vital Document- WS2 UI Work Search Plan	Record if staff provided the customer with a translated WS2 form. Note that a Work Search Plan completed activity should also be recorded. Translated WS2 forms should be sent to UI Central Support for imaging.	Primary Language Tab must be completed No COMMENTS required
NEG			
No	NEG Disaster Eligible	To record that the customer is eligible for under NEG disaster funding	
No	NEG Disaster Hurricane Sandy	To record that a customer affected by Hurricane Sandy has been determined eligible for NEG temporary employment	
No	NEG Disaster Irene/Lee	To record eligibility for NEG customers affected by Irene/Lee	
No	NEG Disaster Referral	To record that an eligible customer affected by Hurricane Sandy has been referred to the hiring agency or business for consideration of temporary employment	
NY Youth Works			
No	NY Youth Works Certified (Bldg 12 WOTC Unit Only)	To record that the customer was New York Youth Works certified by the WOTC Unit	
No	NYYW Cntct – No – Letter Not Sent/Invalid Phone # / Invalid Email	No contact was made to the New York Youth Works customer due to inaccurate contact data on file	
No	NYYW Cntct – Yes – Already Employed	Contact was made to the New York Youth Works customer and they are already employed	
No	NYYW Cntct – Yes – Enrolled in Youth Program	Contact was made to the New York Youth Works customer and the customer was enrolled in the Youth Program	
No	NYYW Cntct – Yes – Left Message	Contact was made to the New York Youth Works customer and a message was left	
No	NYYW Cntct – Yes – Scheduled Appointment	Contact was made to the New York Youth Works customer and the customer was scheduled for an appointment	
No	NYYW Cntct – Yes – Sent	Contact was made to the New York Youth Works	

	Follow-up Email / Invalid Phone #	customer via a follow-up email. No voice mail available	
No	NYYW Cntct – Yes – Sent Follow-up Email / No VM available	Contact was made to the New York Youth Works customer via email. No phone or voicemail available	
No	NYYW Cntct – Yes – Sent USPS Letter / Invalid Phone # / Invalid Email	Contact was made to the New York Youth Works customer via USPS letter, because no current phone or email on record.	
No	NYYW Cntct – Yes – via Email/Texting	Contact was made to the New York Youth Works customer via email or text	
No	NYYW Cntct Result – Attended Appointment	New York Youth Works customer attended their appointment	
No	NYYW Cntct Result – Enrolled with a T1/T2/T3 Contractor-Provider	New York Youth Works customer was enrolled with a T1/T2/T3 contractor/provider	
No	NYYW Cntct Result – FTR for Appointment	New York Youth Works customer failed to report to a scheduled appointment	
	Other Services		
No	Assessed for STEM Readiness (Greater Capital Region Only)	This service should be recorded for each customer that has been assessed for STEM Readiness funded by the Workforce Innovation Fund Grant. This grant was awarded to the following Local Workforce Investment Areas: Albany/Rensselaer/Schenectady; Columbia/Greene, Fulton/Montgomery/Schoharie and Saratoga/Warren/Washington.	In COMMENTS, indicate the specifics of the assessment and any resulting action taken or planned.
No	BT Works	This service should be recorded for each customer that receives services through the Bronx to Work project.	No specific content documentation required in COMMENTS.
No	Follow Up (L1) – Post Placement	To record follow-up contacts and/or services provided to customers who have secured unsubsidized employment.	In COMMENTS, indicate the specifics of the follow-up contact and any resulting action taken or planned.
No	Referral to Training	To record that a job seeker has been referred (specific information as to whom, when and	In COMMENTS, indicate the specifics of the referral. To be

		<p>where) to a job training program. This activity is for case management services only and follow-up. This activity should be recorded in conjunction with Core or Intensive services. For example, if during an Initial Assessment it is determined that the customer would benefit from ESL classes and a direct referral is made to a program, or during an intensive service staff are working on an IEP with the customer and a referral is made to a training program.</p>	<p>considered a referral an appointment or specific contact information must have been given and documented.</p>
No	Initiate Service Suspension	<p>To record that a disruptive customer was suspended from receiving services in accordance with Technical Advisory #10-17 or in accordance with local LWIA guidelines for suspending customers for disruptive behavior.</p>	<p>When initiating a suspension, in addition to checking this service, the following additional steps in OSOS should also be recorded: Using the Post-a-Note button at the bottom of the Activities screen, record the general reason for the suspension. Include in the period of time of the suspension, the ending date of the suspension, the category of behavior that prompted the suspension per the directive (physical, violent or harmful behavior, disruptive behavior, or violation of facility rules), whether the suspension represents a full suspension from any/all access to the office or a limited suspension from a particular type of service activity. Also include any specific critical information describing the circumstances and/or terms of the suspension that should generally be known by other staff. Limit the content of the OSOS comment to</p>

			<p>essential information, keeping in mind that the full details are to be documented and maintained by management in a secure location in the office.</p> <ul style="list-style-type: none"> Change the Job Seeker Status found on the General Info Tab of the OSOS Customer Detail from active to inactive. This will suspend the customer from job match activity. <p>Change the Employment Objective found on the Objective Tab of the OSOS Customer Detail to identify the Service Suspension and the dates of the suspension on the first line of the Objective field. Since the Objective is one of the limited data fields related to the customer that is displayed in any listing of Search Results in OSOS, it provides an easy way to immediately identify that the customer has been suspended from service.</p>
No	Referred to DMV for CDL Cert for Military Waiver of Road Test	To record that a veteran is eligible for a CDL road test waiver and that they have been referred to DMV to obtain their CDL under the waiver.	
No	Report of New Employment	To record that an OSOS job seeker has entered employment with a new employer. This entry is intended for informational purposes only to provide valuable, updated information regarding the customer's employment status.	<p>In COMMENTS, provide the following information about the new employment, if available:</p> <ul style="list-style-type: none"> The hiring employer The date of the hire

		<p>Exception: "Report of New Employment" should not be recorded if the employment represents a placement resulting from a previously recorded job referral (unless outside job listing). In that case, a Placement would be recorded instead of a Report of New Employment.</p>	<ul style="list-style-type: none"> • The source of the hire information (i.e., direct from the job seeker, the employer, etc.) • Other pertinent information about the nature of the position (e.g., job title, wage) <p>Update the work history tab with the details of the new employment. Note: You may also want to change the job seeker's status to Inactive so that he/she will not be picked up in future job match runs.</p>
No	Reported Following an FTR Hold	To record the date the UI claimant reports to the Career Center after being notified that their UI claim is held due to a failure to report for a scheduled appointment.	No specific content documentation required in COMMENTS.
No	Terminate Service Suspension	To record that a suspension imposed against a disruptive customer in accordance with Technical Advisory #10-17 or in accordance with local LWIA guidelines for suspending customers for disruptive behavior, has been terminated.	<p>In addition to recording the termination of the suspension using this service code, the following additional steps in OSOS should also be recorded:</p> <ul style="list-style-type: none"> • Delete the Service Suspension information added to the first line of the Employment Objective found on the Objective Tab of the OSOS Customer Detail so that this will no longer appear on the Search results and/or the customer's résumé. It is critical to make sure this information is

			<p>deleted prior to re-activating the Job Seeker Status, so that it does not appear on the customer's résumé. This is an especially critical step if the customer résumé is one that is marked for posting on the Internet.</p> <ul style="list-style-type: none"> • Change the Job Seeker Status found on the General Info Tab of the OSOS Customer Detail back to Active, if previously inactivated as a result of the service suspension and the customer is still interested in seeking employment.
No	WFS Participant	To record that the customer self discloses that they are formerly incarcerated and identified to receive job matches and referrals through the <i>Work For Success</i> Program.	Document any work search restrictions that is relevant to job matching and referrals.
No	WIF Summer STEM Institute	This service should be recorded for each youth that participated in the 2013 Summer STEM Institute Nanotech camp funded by the Workforce Innovation Fund Grant. This grant was awarded to the following Local Workforce Investment Areas: Albany/Rensselaer/Schenectady; Columbia/Greene, Fulton/Montgomery/Schoharie and Saratoga/Warren/Washington.	No COMMENTS required
REA Grant			
No	REA Enrollment ES Only	Customer is enrolled in the REA program and was scheduled for a 1 st REA.	This is entered automatically after the 1 st REA appointment is scheduled in REOS.
No	1 st REA	Customer attended 1 st REA appointment.	Activities should also be recorded for each service provided during the

			<p>appointment.</p> <p>Comments should include a summary of the interview following the SENSE model.</p>
No	2 nd REA	Customer attended 2 nd REA appointment.	<p>Activities should also be recorded for each service provided during the appointment.</p> <p>Comments should include a summary of the interview following the SENSE model.</p>
No	3 rd REA	Customer attended 3 rd REA appointment.	<p>Activities should also be recorded for each service provided during the appointment.</p> <p>Comments should include a summary of the interview following the SENSE model.</p>
No	Reported Following FTR Hold REA (address Issues)	To record that the REA customer has reported following an FTR and missed the appointment due to an incorrect address.	Should be used if the customer address in OSOS is the different than the customer's current address. This activity must be entered by close of business on the day the customer reports. Enter a brief comment in OSOS indicating that the customer reported and if the address has been updated.
No	Reported Following FTR Hold REA (Other)	To record that the REA customer reported following an FTR and missed the appointment for any reason other than an address change.	Should be used if the customer address in OSOS is the same as customer's current address. This activity must be entered by close of business on the day the customer reports. Instructions to call the TCC should be provided. Enter a brief

			comment in OSOS indicating that the customer reported and that instructions to call the TCC were provided.
	Return to Work - WCB		
No	Walk in – No referral	To record that a customer with a Workers Compensation case has come to the office to receive services and/or look for work.	Use the SENSE model or comparable to organize meeting notes.
	SEAP		
No	SEAP Approved	Recorded by the Unemployment Insurance SEAP Unit to indicate that the customer has been approved for the Self Employment Assistance Program.	No COMMENTS required.
No	SEAP Not Approved	Recorded by the Unemployment Insurance SEAP Unit to indicate that the customer was not approved for the Self Employment Assistance Program.	No COMMENTS required.
No	SEAP Withdrawn	Recorded by the Unemployment Insurance SEAP Unit to indicate that the customer has withdrawn from the Self Employment Assistance Program.	No COMMENTS required.
No	SEAP Terminated	Recorded by the Unemployment Insurance SEAP Unit to indicate that the customer has been terminated from the Self Employment Assistance Program.	No COMMENTS required.
	VET Referrals		
No	DVOP Eligible/ Service Referral	To record that the veteran meets eligibility requirements to be served by the local DVOP Specialist.	Provide the criteria the veteran met
No	LVER Job Matching Referral	To record that the veteran is ready for job development, matches and referrals by the LVER	Record any significant information that would be helpful to staff for job matching.
	Work Search Plan		
No	Work Search Plan Completed	To record that a work search plan was completed with a UI customer via the OSOS Work Search Plan.	In COMMENTS record the work search issue that prompted the need for the work search plan.

		Note: If unable to complete a Work Search Plan in OSOS, complete the WS2 form with the customer and send a signed copy to UI Central Support for imaging.	
L1 SUPPORTIVE SVCS / NEEDS RELATED PMTS			
Enrolling	Service	Definition	Guidance
	Job Coaching		
Yes	Job Coaching	To record that a participant has been assigned a job coach to provide initial support on the job in terms of accessing skills training, reasonable accommodations, or to help identify a mentor or arrange for other supportive services such as transportation, child care or health care. Job coaches may also interact with the employer or supervisors to identify initial problem solving strategies, provide sensitivity training for the employer and staff or determine job coach services at the worksite. A job coach is usually assigned in connection with “supported employment” (vocational rehabilitation services).	In COMMENTS, note the date of the job coach assignment, the planned duration of the service and the service provider. At a minimum, you should record this service on the date the customer first begins receiving the support, and routinely register service receipt (e.g., every 60 days) through the last date the customer receives this service to ensure participation is properly extended.
	Needs Related Payments		
No	Needs Related Payments (WIA Only)	Financial assistance provided to adults and dislocated workers who are unemployed and do not qualify for (or have ceased to qualify for) unemployment compensation (or trade readjustment allowance under TAA or NAFTA-TAA) for the purpose of enabling such individuals to participate in WIA training services.	In COMMENTS, note amount of payment and training program.
	Supportive Services		
Yes	Asset Development Strategies / Supports	To record when staff assists a customer with a disability to access services that will promote long-term financial stability. There are a number of strategies that may be employed under “Asset Development” which can help achieve long-term financial stability.	In COMMENTS, detail the strategies used to promote long-term financial stability.

		Examples include: Individual Development Accounts (IDA), Access to the Earned Income Tax Credit (EITC), Family Self-Sufficiency (FSS) program, and Earned Income Disregard (EID).	
Yes	Referral to Financial Literacy Training	To record a referral to a community provider for Financial Literacy training has been provided. Financial Literacy training is an important part of assisting customers with disabilities who may have experienced financial difficulties that include incurring debt or lingering student loans.	In COMMENTS, provide the name of the community provider.
Yes	Referred to Supportive Services	To record the referral of a job seeker to supportive services such as transportation, child care, dependent care, housing and needs-related payments that are necessary to enable an individual to participate in authorized WIA activities which cannot be obtained through other programs.	In COMMENTS, indicate the program to which you are referring the job seeker. This should include specific referral information, such as appointment date and time and who the appointment is with, if known.
No	Supportive Services (Other)	To record when a job seeker has been funded for and received a supportive service that does not fit into one of the following categories: child care, dependent care, housing, or transportation. For example, credit/financial counseling would be recorded under "Supportive Services – Other."	In COMMENTS, note the dates of receipt of services, and the service provider.
No	Supportive Services - Child Care	To record when a job seeker has been funded for and received child care services that are necessary to enable them to participate in authorized WIA activities which cannot be obtained through other programs. It can include day care or after-school programs inside or outside the home. It usually includes supervision and shelter and may include subsistence and transportation.	In COMMENTS, note the details of the dates for the receipt of services, and the service provider.
No	Supportive Services - Dependent Care	To record when a job seeker has been funded for and received dependent care services that are necessary to enable them to participate in	In COMMENTS, note the dates of receipt of services, and the service provider.

		authorized WIA activities which cannot be obtained through other programs. It can include day care or other programs inside or outside the home. It usually includes supervision and shelter and may include subsistence and transportation.	
No	Supportive Services - Housing	To record when a job seeker has been funded for and received housing services that are necessary to enable them to participate in authorized WIA activities which cannot be obtained through other programs. Such services assist participants in maintaining or obtaining adequate shelter for themselves and their families while they are receiving employment, training or other services.	In COMMENTS, note the dates of receipt of services, and the service provider.
No	Supportive Services - Transportation	To record when a job seeker has been funded for and received transportation services that are necessary to enable them to participate in authorized WIA activities which cannot be obtained through other programs. Such services help ensure participant mobility between home and the location of employment, training and/or other services.	In COMMENTS, note the dates of receipt of services, and the service provider.
L1 – VETERAN SPECIFIC SERVICES			
Enrolling	Service	Definition	Guidance
	Case Management		
Yes	Assigned Case Manager (Vets Only)	To record that a staff member has been designated “case manager” to work with a veteran to provide ongoing, one-on-one personal assistance and regular follow-up using a case management approach to ensure that appropriate services are provided. This should be recorded by the assigned staff member at the first appointment with the veteran customer. Contact and meetings as part of ongoing case	A case manager must be assigned to: <ul style="list-style-type: none"> • Veterans determined to be in need of career development services • Veterans from whom multiple service providers are assisting • Veterans receiving services through VR&E

		management should be recorded under “Received Case Management Services (Vets Only).”	In COMMENTS, list the name of the assigned case manager.
Yes	Received Case Management Services (Vets Only)	To record case management for a veteran who has been placed in case management and previously Assigned to a Case Manager (see above). The “Received Case Management Services (Vets Only Service)” activity must be recorded for each contact or meeting subsequent time the customer is served as part of ongoing case management.	Specific services provided during case management should be recorded separately under the appropriate service category (e.g., career guidance, job search planning).
DVOP			
No	DVOP Assessment Completed	Recorded upon completion of the first appointment with the DVOP Activities should also be recorded for each service provided during the appointment.	Comments should include a summary of the case sufficient for other staff to be able to provide services on subsequent appointments if necessary
	Follow-up DVOP Services Completed	Recorded upon completion of any subsequent appointment. Activities should also be recorded for each service provided during the appointment	Comments should include a summary of the case sufficient for other staff to be able for other staff to provide services on subsequent appointments if necessary
	Case Conference	Recorded to indicate that a case conference was held to determine the best course of action to assist the veteran in securing work.	Detailed comments should provide a clear summary of the case conference and indicate what the next steps and service plan is for the veteran.
	Contact In Person (VET)	Recorded to indicate that staff and the veteran have been in contact via phone between JFV appointments.	Comments should summarize the exchange.
	Contact via Email (VET)	Recorded to indicate that staff and the veteran have corresponded via email between appointments.	Comments should summarize the exchange. Entire emails should not be pasted into comments.
	Contact via Phone (VET)	Recorded to indicate that staff and the veteran have been in contact via phone between appointments.	Comments should summarize the exchange.

	Reported Following FTR hold VET (Address Change)	To record that the customer has reported following an FTR and missed the appointment due to an incorrect address.	Should be used if the customer address in OSOS is the different than the customer’s current address. This activity must be entered by close of business on the day the customer reports. Enter a brief comment in OSOS indicating that the customer reported and if the address has been updated.
	Reported Following FTR hold VET (Other)	To record that the customer reported following an FTR and missed the appointment for any reason other than an address change.	Should be used if the customer address in OSOS is the <u>same</u> as customer’s current address. This activity must be entered by close of business on the day the customer reports. Instructions to call the TCC should be provided. Enter a brief comment in OSOS indicating that the customer reported and that instructions to call the TCC were provided.
Gold Card Case Management			
No	GC – Assigned Case Manager	<p>To record that a staff person has been designated “case manager” to work with a post 9/11 Veteran that has indicated a desire to receive gold card services. The case manager provides ongoing, one-on-one personal assistance and regular follow-up using a case management approach to ensure that appropriate services are provided.</p> <p>This should be recorded at the time the case manager is assigned.</p> <p>Contact and meetings as part of ongoing case management should be recorded under “GC - Received Case Management Services (Vets</p>	A case manager must be assigned to any post 9/11 veteran presenting a gold card when seeking services.

		Only).”	
No	GC – Received Case Management	To record case management for a post 9/11 Veteran who has been placed in gold card case management and previously Assigned to a Case Manager (see above). The “GC - Received Case Management Services activity must be recorded for each contact or meeting subsequent time the customer is served as part of ongoing case management.	Specific services provided during case management should be recorded separately under the appropriate service category (e.g., career guidance, job search planning).
No	GC – Ended Case Management – 6 months completed	Recorded to indicate that 6 months of Case management have been completed	
No	GC – Ended Case Management – Employed	Recorded to indicate that the veteran is employed and case management is ended.	The employment information should be recorded in the comments section. Information should include the business name, job title, hours per week and wage.
No	GC – Ended Case Management – Other Reason	Recorded to indicate that case management has been ended before 6 months for reasons other than employment.	Comments should indicate the reason or reasons case management has been ended.
	Training		
Yes	Referred to Training	To record that a Veteran job seeker has been referred (specific information as to whom, when and where) to a Federal job training program. The date of enrollment must have been entered.	In COMMENTS, indicate the specifics of the referral. To be considered a referral an appointment or specific contact information must have been given and documented.
Yes	Veteran Placed in Federal Training (WIA, Job Corps, TAA, other)	To record that a job seeker who was previously referred to Federal training has been enrolled in that program. In order to take a Placed in Training credit, a referral to the training activity that pre-dates	In COMMENTS, indicate the name of the Federal training program and the date the job seeker started this training.
	VETS Case Management Outcomes		
No	Exit Case Management – Entered	Recorded to indicate that case management is	The employment information

	Employment or Improved Wages	being discontinued due to the veteran securing employment or securing employment with higher wages if the veteran was employed at the time services were provided.	should be recorded in the comments section. Information should include the business name, job title, hours per week, and wage.
No	Exit Case Management – Disability or Sole Source income	Recorded to indicate that case management is being discontinued due to the veteran becoming self sufficient financially due to the receipt of disability or other income.	
No	Exit Case Management – No Successful Outcome	Recorded to indicate that case management is being ended without the veteran securing employment, becoming financially self sufficient, leaving the state or entering training.	This is typically used only when the veteran refuses services and we cannot contact them.
No	Exit Case Management – Move Out of State	Recorded to indicate that case management is being ended because the veteran is relocating out of state.	Update OSOS with new contact information.
No	Exit Case Management - Training/School	Recorded to indicate that case management is being ended due to the veteran attending long term training or school. This is typically used for training programs that are 6 months or longer.	
No	Exit Case Management – Other (Comments Required)	Recorded to indicate that case management is being ended for reasons other than those above.	Comments must detail the reason that case management is being ended.
	Vocational Rehabilitation		
No	VA Labor Market Information	To record that staff provided labor market information to a veteran working with the VA Vocational Rehabilitation and Employment program. This activity coincides with services provided as a result of a labor market information referral.	In COMMENTS, provide a summary of the careers/occupations discussed and the information provided.
Yes	Vocational Rehabilitation from Vet Admin (Vets Only)	Recorded when a referral of a veteran job seeker from the VA Vocational Rehabilitation and Employment Program has been received and processed by Central Office.	In COMMENTS, ISC outlines the processing of the referral. Veterans participating in the VR&E program must be assigned a case

		Recorded by the Intensive Services Coordinator (ISC) only.	manager and enrolled in a service delivery model (i.e. C3E or DVOP).
--	--	--	--