

# OSOS Data Entry Guide For NEG Disaster

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

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

## Reporting will be provided per county.

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

### Agency Info Tab

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

The screenshot displays the OSOS interface for the Agency Info tab. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, and Services. The main content area shows customer information: Malinak, Wildbill H., SSN: [redacted], and OSOS ID: NY010444790. The Agency Info tab is selected, showing a form with the following fields: Agency (Westchester Bal./Putnam WAE), Intake Date (10/18/2011), Enrollment Date (10/18/2011), Termination Date (empty), Termination Reason (empty), and Status (Active). A table below the form lists the agency: Westchester Bal./Putnam WAE with a status of Active. At the bottom, there are buttons for New Agency and Delete Agency, and a Save button.

Agency	Status
Westchester Bal./Putnam WAE	Active

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



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

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

#### **If an Agency is listed and the status is Inactive:**

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

Customer Search Customer Detail Comp Assess **Services**

Malinak, Wildbill H. SSN: OSOS ID: NY010444790

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

● Agency Orange WAE

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

Termination Date 07/12/2011

Termination Reason Services No Longer Needed

Status Inactive

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

New Agency Delete Agency

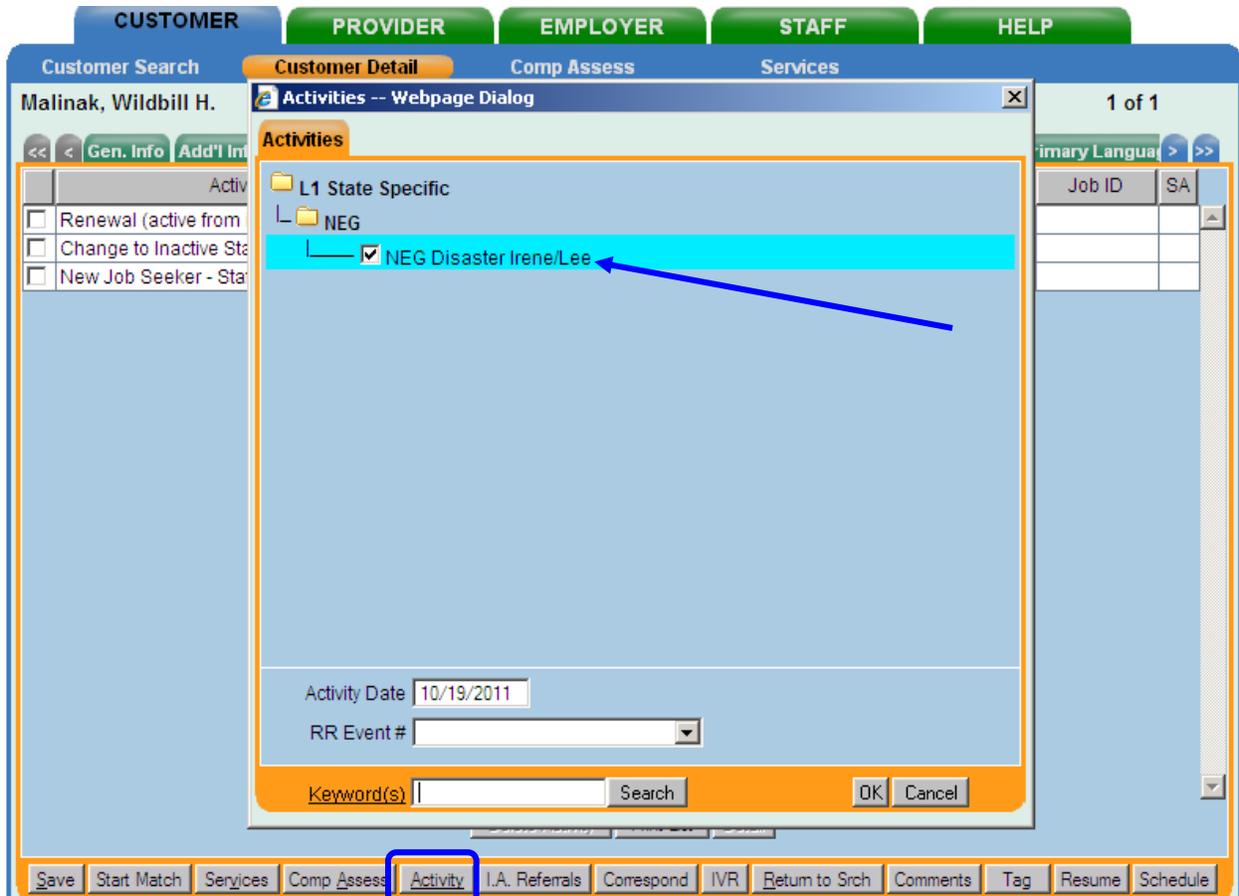
Save Customer Detail Comp Assess Comments Check Labor Market Information

Staff: Barber, Michael Office: OSOS/REOS Central Support Unit Security: Delete 10/19/2011

# CUSTOMER DETAIL

## Tracking Applications

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



## Documenting Eligibility

- To be eligible an applicant must meet one of the three requirements:
  1. Dislocated due to the disaster
  2. Identified as a Dislocated Worker
  3. Considered Long term unemployed, which is more than 26 continuous weeks of unemployment
- In the Customer module > Customer Detail Window > Add'l Info tab, press the **Programs Public Assistance** button. Enter "Yes" for Dislocated Worker and date determined to be eligible.

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

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

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

Programs/Public Assistance Selection

Income Status

Lower Living Standard Yes

Income 70% LLSIL N/A

Local Priority N/A

Disability Status Not Disabled

Migrant / Seasonal Worker Yes No

Military Service

Service Veteran

Customer List Participation

List Name

Malinak Test List2

Assign To List Remove

Programs and Public Assistance -- Webpage Dialog

Programs & Public Assistance

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

## Documenting Eligibility (continued)

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

The screenshot displays the 'Customer Detail' window for Malinak, Wildbill H. (SSN: , OSOS ID: NY010444790). The 'Comments' tab is selected and highlighted with a blue box. Below the main form area, a row of buttons includes 'Save', 'Start Match', 'Services', 'Comp Assess', 'Activity', 'I.A. Referrals', 'Correspond', 'IVR', 'Return to Srch', 'Comments', 'Tag', 'Resume', and 'Schedule'. The 'Comments' button is highlighted with a blue box. A blue arrow points from this button to the 'Comment -- Webpage Dialog' window shown below.

The screenshot shows the 'Comment -- Webpage Dialog' window. It has a title bar 'Comment -- Webpage Dialog' and a tab 'Comments'. It contains a large text area for entering a comment. At the bottom, there are three buttons: 'Save', 'Spell Check', and 'Cancel'. A blue arrow points from the 'Save' button in the main window to the 'Save' button in this dialog.

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

## Documenting Eligibility (continued)

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

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

The screenshot shows a software interface with a top navigation bar containing buttons for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with buttons for Customer Search, Customer Detail (selected), Comp Assess, and Services. The main window displays customer information for 'Malinak, Wildbill H.' and a dialog box titled 'Activities -- Webpage Dialog'. The dialog box has a tree view of activities, with 'NEG Disaster Eligible' selected and highlighted in blue. Below the tree view, the 'Activity Date' field is populated with '10/21/2011' and the 'RR Event #' field is empty. The 'Keyword(s)' field is empty. The 'OK' and 'Cancel' buttons are visible at the bottom of the dialog box. The background window shows the 'Customer Detail' window for 'Malinak, Wildbill H.' with various fields for customer information and assignment.

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

## Documenting Referrals to Hiring Agency/Business

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

The screenshot displays a software interface with a top navigation bar containing buttons for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, a secondary navigation bar includes Customer Search, Customer Detail (highlighted), Comp Assess, and Services. The main window shows a customer profile for Malinak, Wildbill H. with fields for SSN, Username, Last Name, Date of Birth, Address, City, Zip Code, Country, Phone, Email, and U.S. Citizen status. A dialog box titled 'Activities -- Webpage Dialog' is open, showing a tree view of activities. The 'NEG Disaster Referral' activity is selected and highlighted in blue. Below the tree view, the 'Activity Date' is set to '10/21/2011'. The 'RR Event #' field is empty. The 'Keyword(s)' field is also empty. The 'OK' and 'Cancel' buttons are visible at the bottom of the dialog box. The background shows the 'Customer Detail' page for Malinak, Wildbill H. with various fields for personal and contact information.

Verify the Activity Date is correct and press the “**Ok**” button. Remember to “**Save**” the record.

### **Please note:**

1. Record this Activity only when the customer is determined eligible and referred as a potential hire to the hiring agency/business.
2. The three L1 State Specific Activities (NEG Disaster Irene/Lee, NEG Disaster Eligible, and NEG Disaster Referral) will be used for reporting purposes only. These activities will not create or extend any program enrollment.

# PROVIDER MODULE

## Setting up the Provider Location

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

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



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

The screenshot shows the 'Provider Detail' screen for 'NEG Disaster - Broome County' (ID: 70834). The interface includes tabs for 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. The 'PROVIDER' tab is active, and the 'Provider Detail' sub-tab is selected. The screen is divided into two main sections: 'Provider Info' and 'Locations'.

**Provider Info:**

- Provider Status: Active
- Federal ID (FEIN):
- State ID (EIN):
- Organization Type:
- Provider Name: NEG Disaster - Broome County
- Provider Phone: Ext:
- Provider URL:
- Provider Email:

**Billing Address:**

- Street Address (line1): Broome-Tioga Workforce New Yo
- Street Address (line2): 171 Front Street
- City: Binghamton
- State: New York
- Zip Code: 13905

**Locations:**

- Location Name: DO NOT USE
- Street Address (line1): Type employer's info here
- Street Address (line2):
- City: Binghamton
- State: New York
- Zip Code: 13905
- Location Suffix:
- WIB: Broome/Tioga Counties

At the bottom of the 'Locations' section, there is a dropdown menu for 'Location' with 'DO NOT USE' selected. Below the dropdown are buttons for 'New Location', 'Delete Location', 'Copy Address', and 'Show Deletes'.

At the bottom of the screen, there are buttons for 'Save', 'Print', 'Return to Search', and 'Comments'. The footer shows 'Staff: Rotman, Neil', 'Office: NY9999', 'Unsaved Changes', 'Security: Delete', and '10/28/2011'.

## Setting up the Provider Location (Continued)

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

Provider Search **Provider Detail** Offering Search Offering Detail

NEG Disaster - Broome County ID: 70834 1 of 1

General Info Contact Info **Services** Service Performance Comments

Service Detail

- Service Category: Disaster Relief Assistance
- Service Type: Disaster Relief Temporary Job
- Service Name: Disaster Relief Temporary Job-Irene  Approved
- Description: Disaster Relief Temporary Job - Irene/Lee
- Service ID: 93368 Training Credit Hours:
- Total Service Length: Weeks  Days  Hours
- O\*Net Title:
- CIP Code:

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

Staff: Rotman, Neil Office: NY9999 Security: Delete 10/28/2011

## Documenting Individuals Hired

- One provider record will be setup for each of the 5 authorized counties.
- Each employer of record within the county will be entered as a Provider Location.
- One L2 service will be setup to record the “Job Placement”.
- One service offering will be setup for each employer of record.
- The starting date may not be before 8/31/2011.
- There is no established end date although the contract is scheduled to end 3/31/2012.
- Service will be funded with “NEG Disaster Funds”. This service **will** co-enroll the customer in Labor exchange (LEX), WIA and Common Measures.

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

# SERVICES MODULE

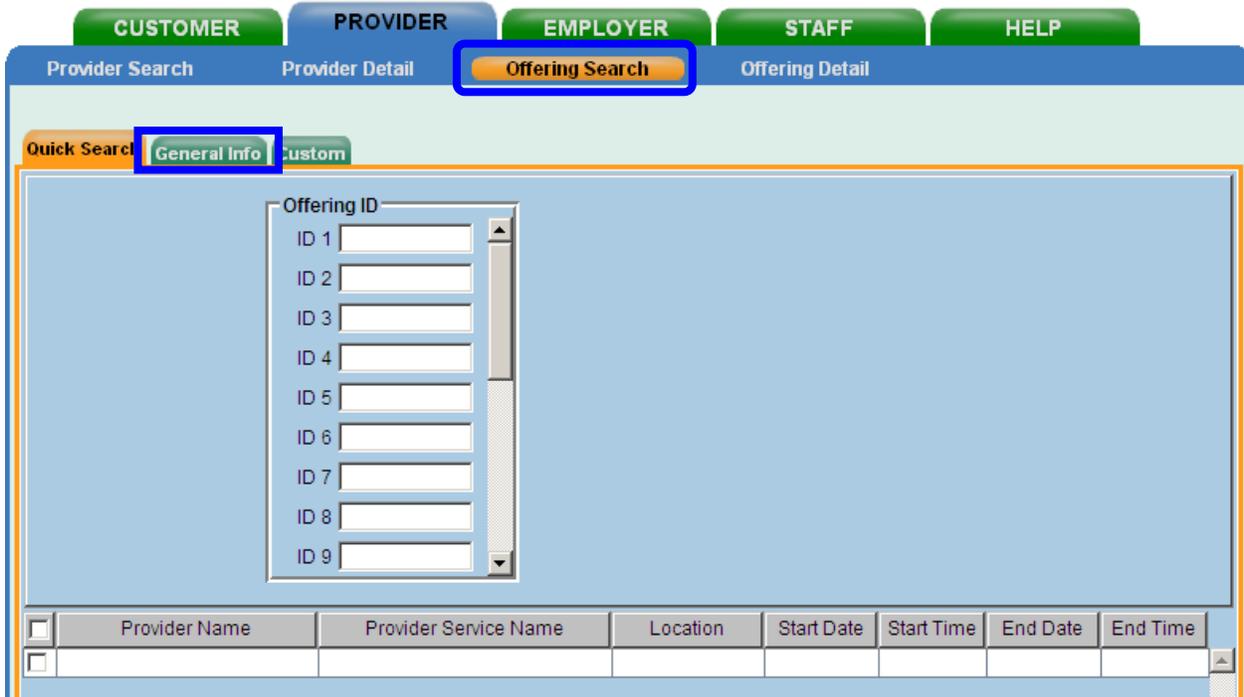
The **Services** module is where **WIA Level 2 services** are manually entered, and where some Activities are created as functionally aligned services.

The **“Disaster Relief Temporary Job”** L2 service is entered through the Customer module > Services window > Services tab by pressing the **“New Service”** button on the bottom of the screen.

The screenshot displays the 'Services' module interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, and Services (which is currently selected). The main header shows 'Malinak, Jumper' with SSN and OSOS ID: NY010444810, and a 'Record Saved' status. A secondary navigation bar includes Agency Info, Achievement Objectives, Services (selected), Service History, Enrollments, Outcomes, Comments, Audit, and Training Ad. The main content area is divided into 'Detail' and 'Funding' sections. The 'Detail' section contains various input fields for provider information, costs, dates, and program details. The 'Funding' section includes a table with columns for Level, Source, Obligated, Actual, and Oblig #, along with Total Funding, Petition #, and RR Event # fields. Below these sections is a table with columns for Achievement Objective and Service, listing items like 'Assessment Interview, Initial Assessment' and 'STCR Business Systems, Inc.'. At the bottom, there is a row of buttons: 'New Service' (highlighted with a blue box), 'Delete Service', 'Authorization', 'IPA Service Summary', 'Payments', 'Tracking', and 'Change Actual Cost'. A final row of buttons includes 'Save', 'Customer Detail', 'Comp Assess', 'Comments', and 'Check Labor Market Information'. The footer shows 'Staff: Rotman, Neil', 'Office: NY9999', 'Security: Search', and the date '10/28/2011'.

## SERVICES (CONTINUED)

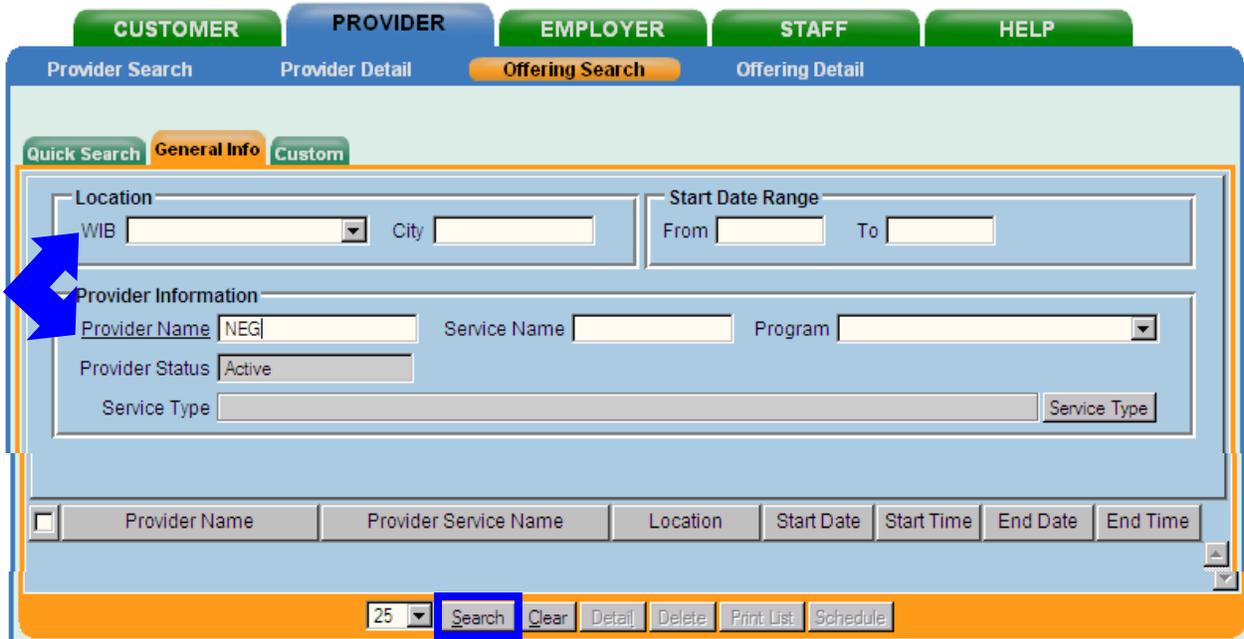
You will be automatically redirected to the Provider Module > Offering Search window. Staff should click on the General Info tab.



The screenshot shows the 'Offering Search' window with the 'General Info' tab selected. The window has a top navigation bar with 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP' buttons. Below this is a sub-navigation bar with 'Provider Search', 'Provider Detail', 'Offering Search', and 'Offering Detail'. The 'Offering Search' tab is highlighted. Underneath, there are 'Quick Search', 'General Info', and 'Custom' sub-tabs, with 'General Info' selected. The main area contains a list of 'Offering ID' fields (ID 1 through ID 9) and a table with columns: Provider Name, Provider Service Name, Location, Start Date, Start Time, End Date, and End Time. The table is currently empty.

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

Type "**NEG**" into the Provider Name and press the "**Search**" button.



The screenshot shows the 'Offering Search' window with the 'General Info' tab selected. The window has a top navigation bar with 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP' buttons. Below this is a sub-navigation bar with 'Provider Search', 'Provider Detail', 'Offering Search', and 'Offering Detail'. The 'Offering Search' tab is highlighted. Underneath, there are 'Quick Search', 'General Info', and 'Custom' sub-tabs, with 'General Info' selected. The main area contains search criteria fields: 'Location' (WIB dropdown, City text box), 'Start Date Range' (From and To text boxes), 'Provider Information' (Provider Name text box with 'NEG' entered, Service Name text box, Program dropdown), 'Provider Status' (Active dropdown), and 'Service Type' (text box). A blue arrow points to the 'Provider Name' field. At the bottom, there is a table with columns: Provider Name, Provider Service Name, Location, Start Date, Start Time, End Date, and End Time. Below the table are buttons: Search, Clear, Detail, Delete, Print List, and Schedule. The 'Search' button is highlighted.

## SERVICES (CONTINUED)

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

The screenshot shows the 'Offering Search' interface. At the top, there are tabs for 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. Below these are sub-tabs for 'Provider Search', 'Provider Detail', 'Offering Search' (which is active), and 'Offering Detail'. The page number '1 - 2 of 2' is displayed in the top right. The search criteria section includes 'Quick Search', 'General Info', and 'Custom' tabs. Under 'General Info', there are fields for 'Location' (with a dropdown menu showing 'WIB' and a 'City' field), 'Start Date Range' (with 'From' and 'To' date fields), 'Provider Information' (with 'Provider Name' set to 'NEG', 'Service Name', 'Program' dropdown, 'Provider Status' set to 'Active', and 'Service Type' dropdown), and a 'Service Type' button. Below the search criteria is a table with the following data:

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

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

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

This is a close-up view of the search results table. The row for 'NEG Disaster - Broome County' is selected, indicated by a checkmark in the first column and a blue highlight. The 'Schedule' button in the bottom right corner is highlighted with a blue border.

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

## SERVICES (CONTINUED)

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

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

**CUSTOMER**   **PROVIDER**   **EMPLOYER**   **STAFF**   **HELP**

Customer Search   Customer Detail   Comp Assess   **Services**

Malinak, Jumper   SSN:   OSOS ID: NY010444810

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

**Detail**

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

**Funding**

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

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

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

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

Save   Customer Detail   Comp Assess   Comments   Check Labor Market Information

Staff: Rotman, Neil   Office: BINGHAMTON - 0900   Security: Delete   10/28/2011

## Funding

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

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

Obligated Amount  OR Obligated Percentage

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

**Customer Detail** **Comp Assess**

**General Information**

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

**Programs & Public Assistance**

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

**Income & Disability Status**

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

**Migrant**

- Migrant / Seasonal Wkr: No

**Military Service**

- Service Veteran: Yes
- Active Service: Yes
- From: 04/23/2004
- Thru: 06/23/2006
- Service Disability: Not Disabled
- Campaign Veteran: No
- Transitioning Veteran: No
- Other Eligible: No
- Veteran Era: Other Vet

**Selective Service**

- Selective Service: No

**Work History**

- Reason for Leaving: Lack of work

**Any OSOS questions, please contact the OSOS Help Desk and (518) 457-6586 or via email at [Help.OSOS@labor.ny.gov](mailto:Help.OSOS@labor.ny.gov).**