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:

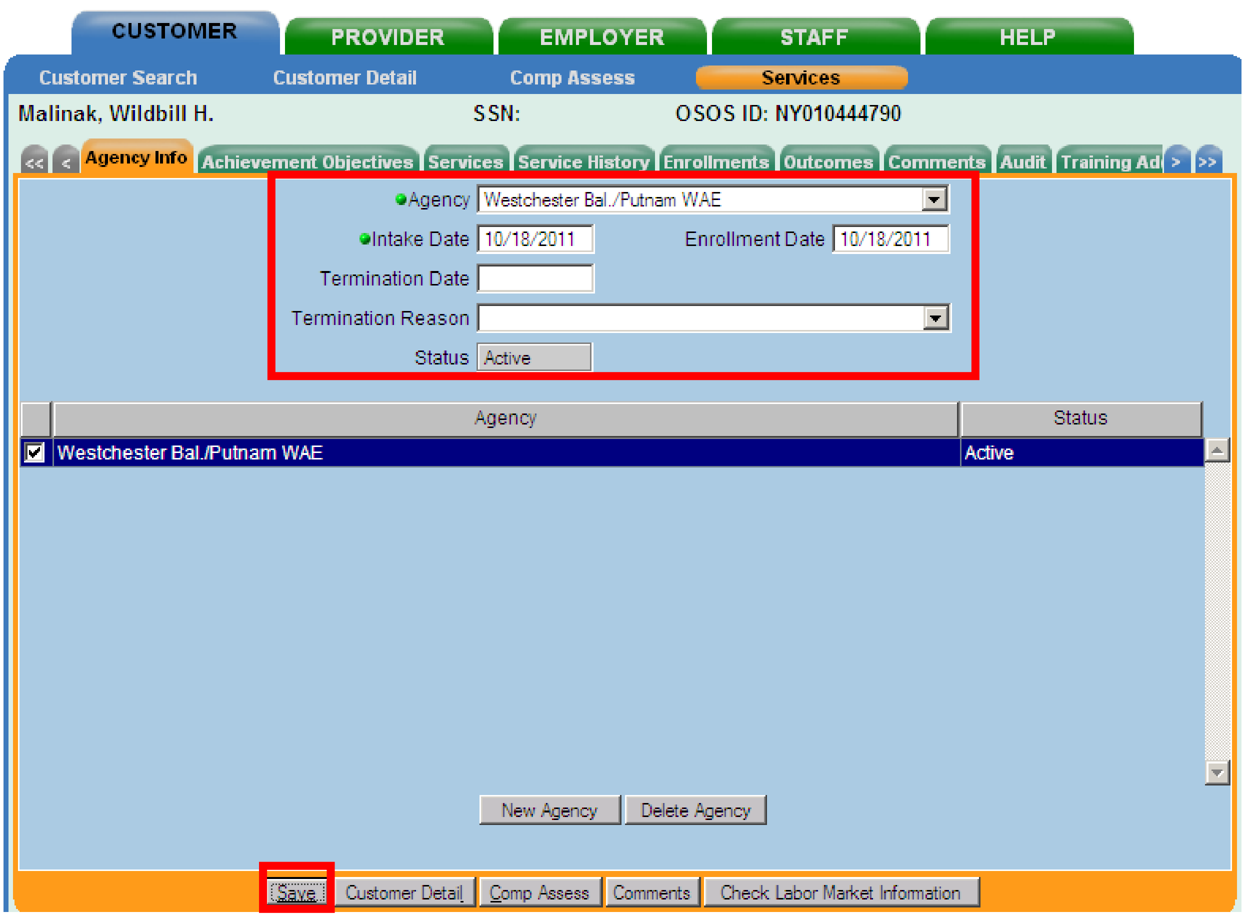
- tracking job seekers that have submitted a preliminary registration,
- recording jobseeker eligibility,
- identifying the required grant documentation that will be maintained in the participant file,
- documenting referrals to the hiring agency or business and
- documenting individuals hired.

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.



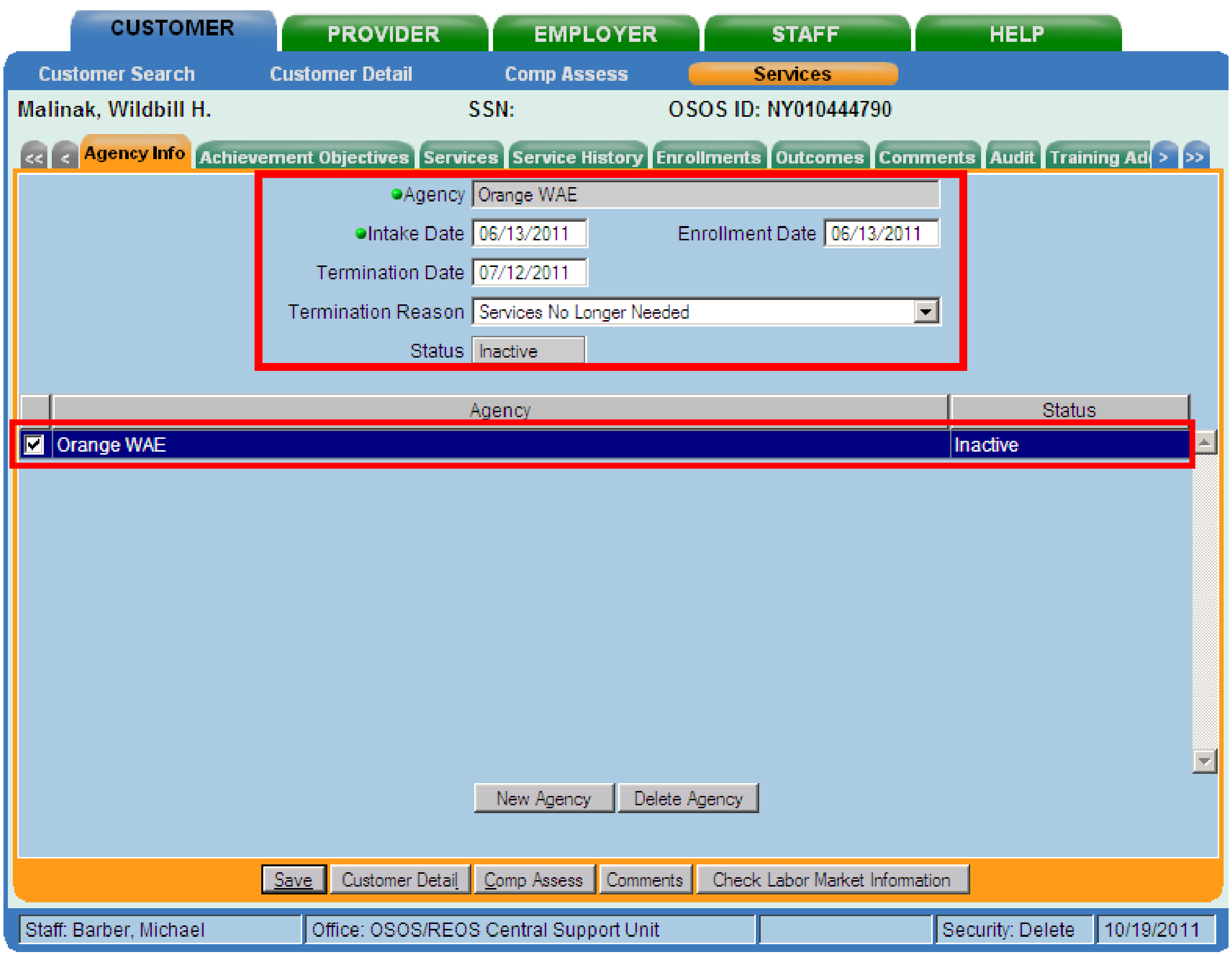
Once the Agency Info tab is reviewed, it is important to check the Service History and Enrollments tab, to determine who has been providing services to the customer and what services have been provided.

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:

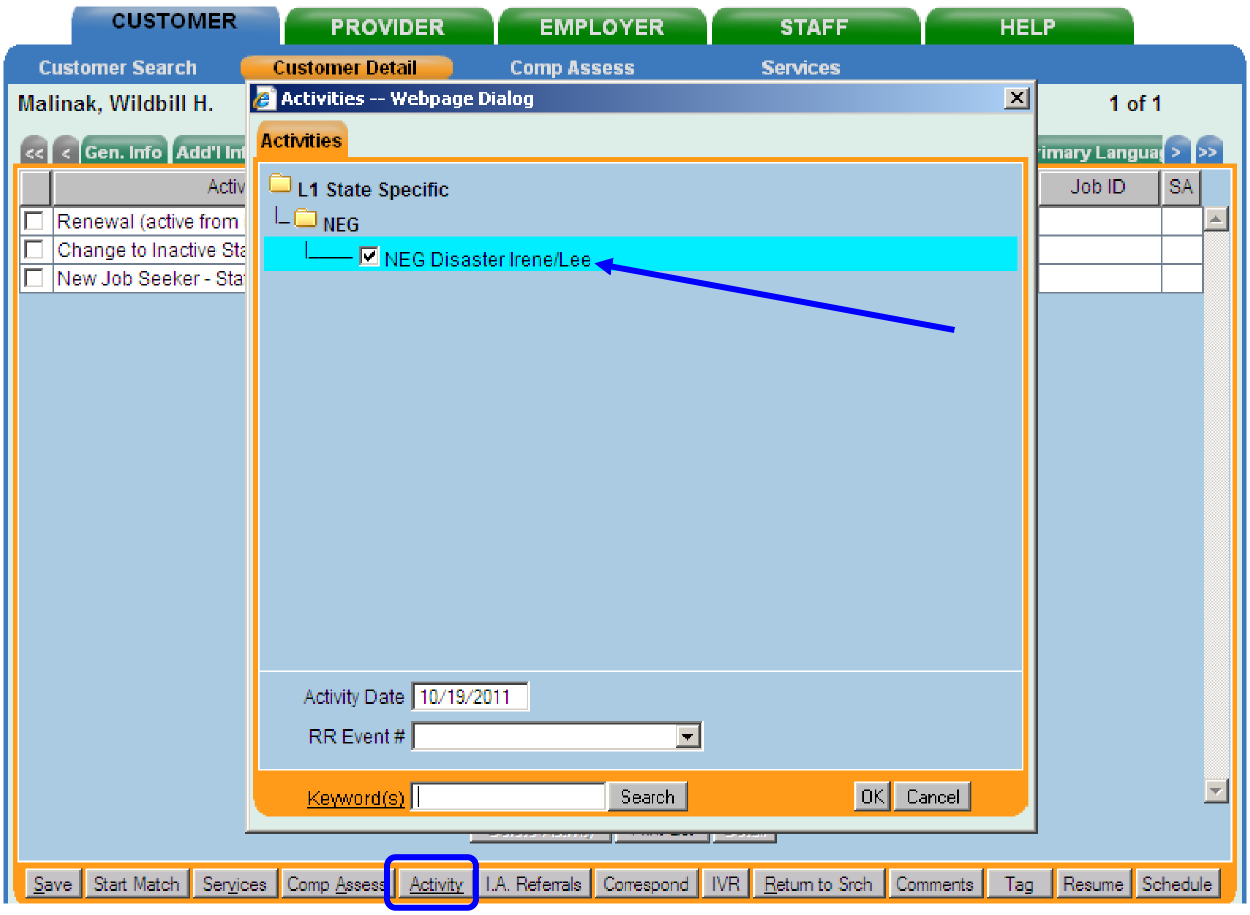
The Agency may be inactive if the Termination Date and Termination Reason is entered into the Agency Info tab. This indicates that the area is no longer working with the customer.



CUSTOMER DETAIL

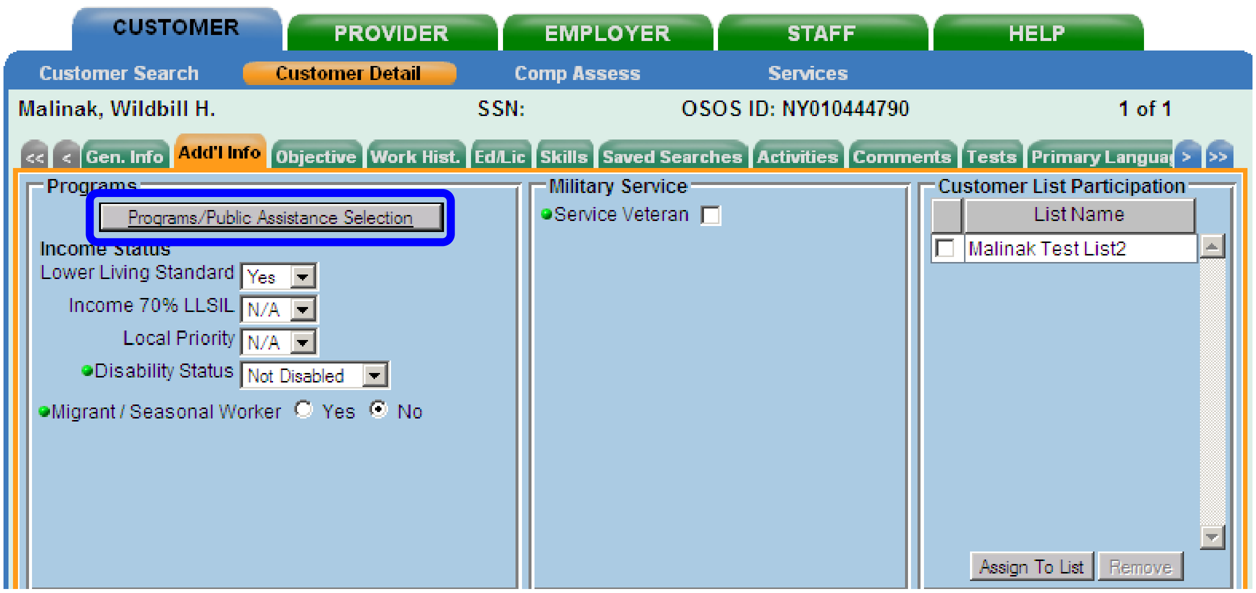
Tracking Applications

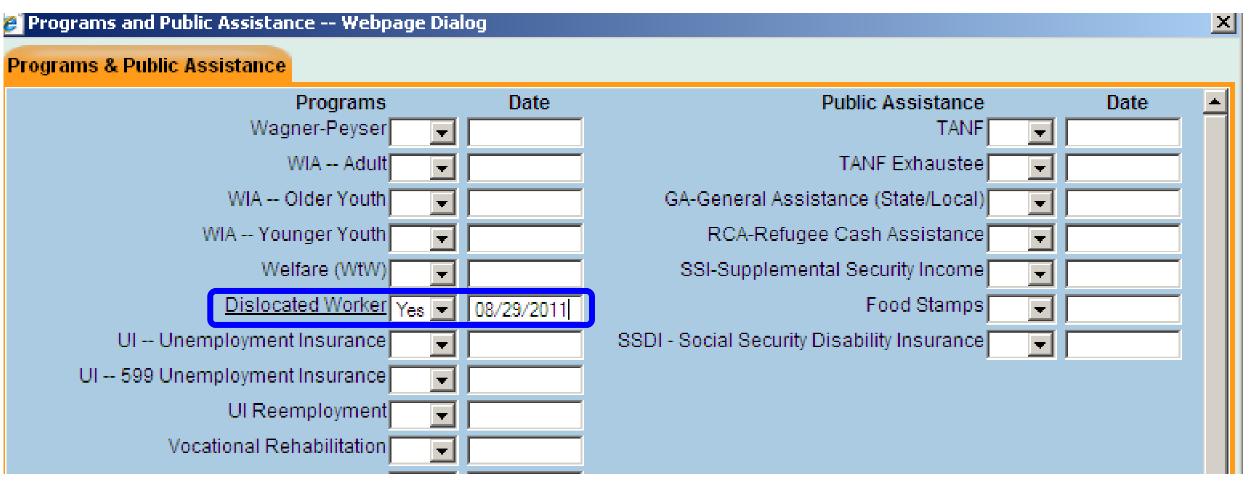
In the Customer module > Customer Detail window, press the **Activity** button at the bottom. Record the L1 State Specific Activity "**NEG Disaster Irene/Lee**" to indentify that the customer completed a preliminary registration indicating interest in temporary employment provided by the grant. This 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

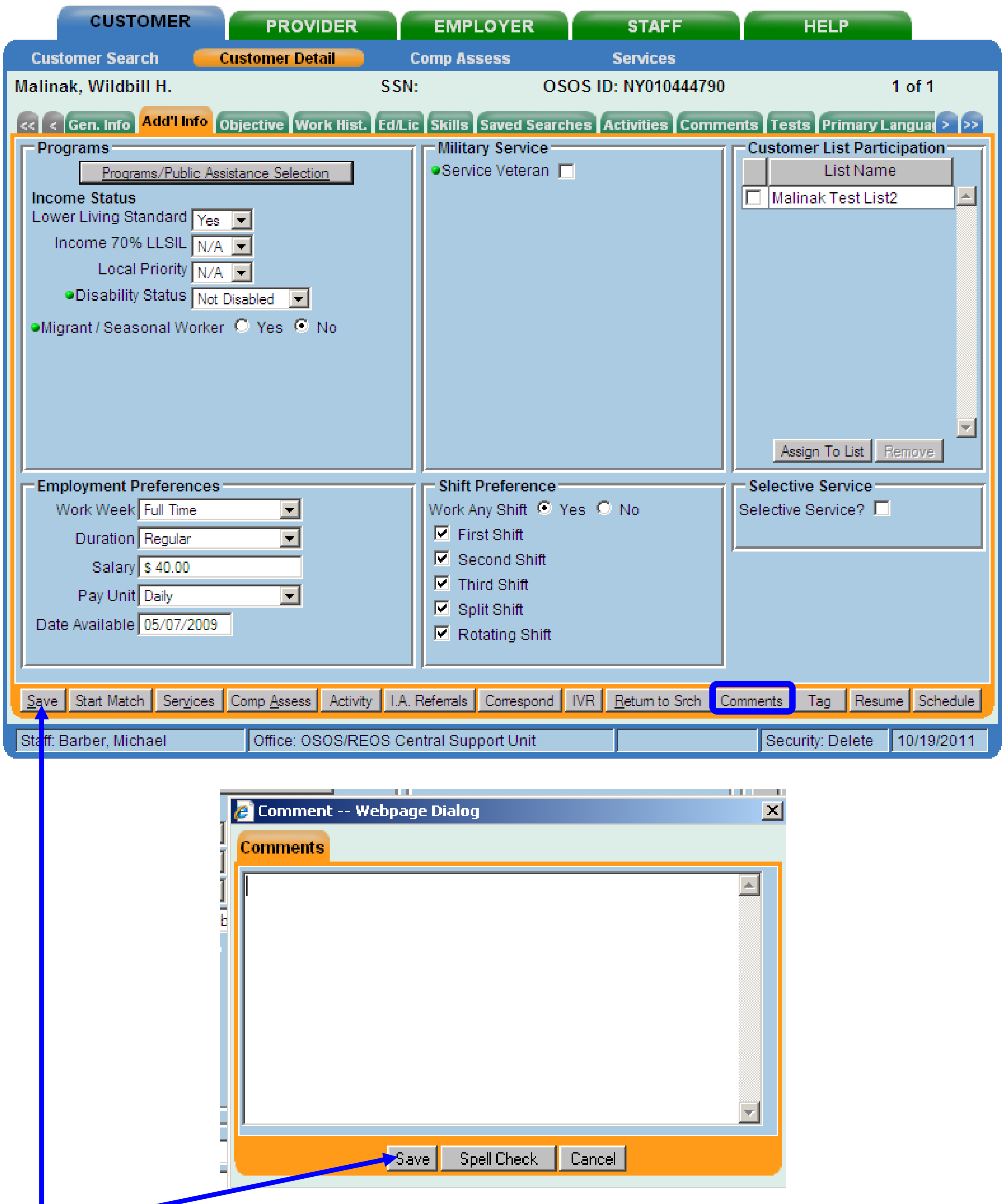
- To be eligible an applicant must meet one of the three requirements:
    1. Dislocated due to the disaster
    2. Identified as a Dislocated Worker
    3. Considered Long term unemployed, which is more than 26 continuous weeks of unemployment
- In the Customer module > Customer Detail Window > Add'l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





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.

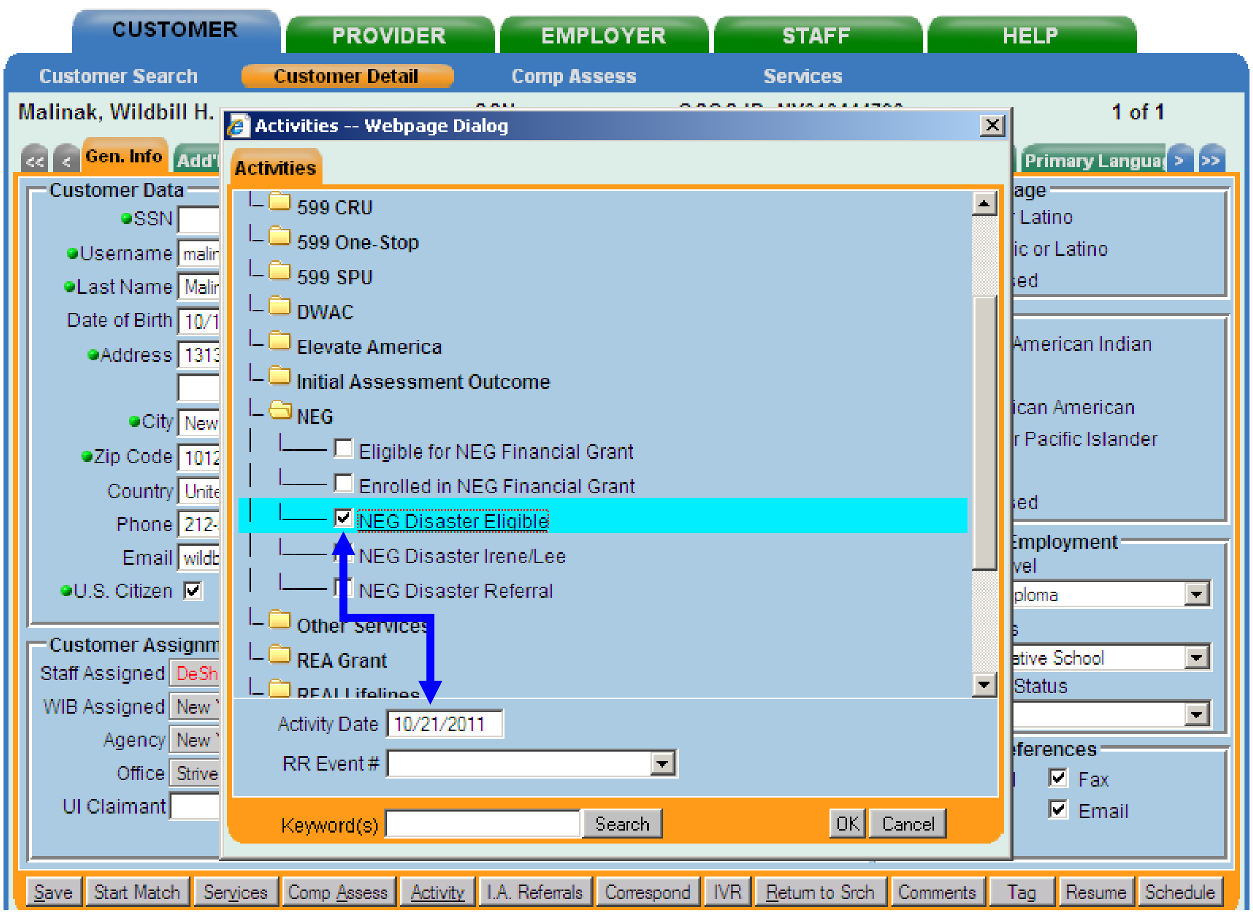


Once you have entered the comment "**Save**" the comment and "**Save**" the record.

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.

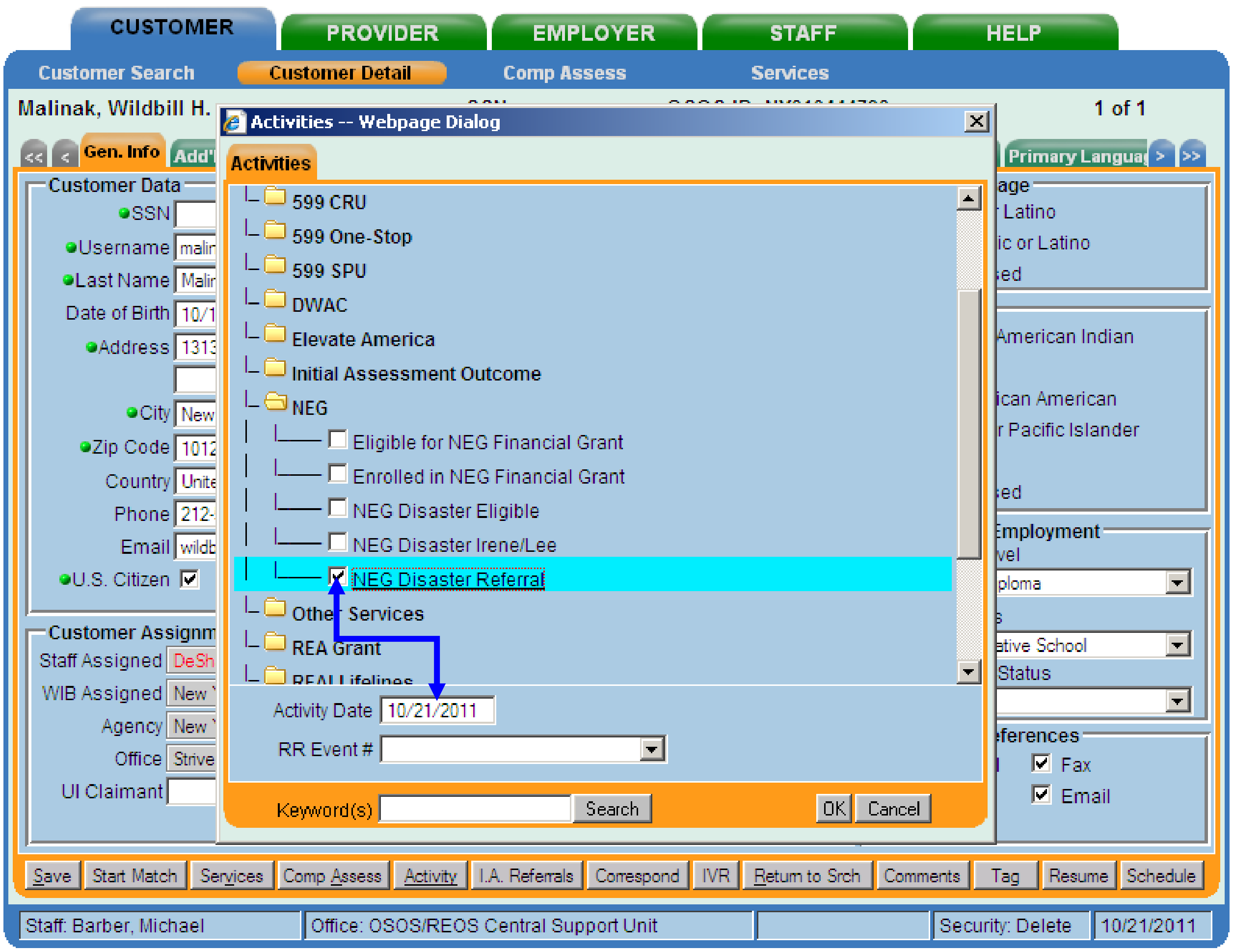
In the Customer module > Customer Detail window, press the **Activity** button at the bottom and data enter the L1 State Specific Activity "**NEG Disaster Eligible**". The activity date will automatically populate with the current date. The **Activity Date** of this activity should be the date you determined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



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.



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.

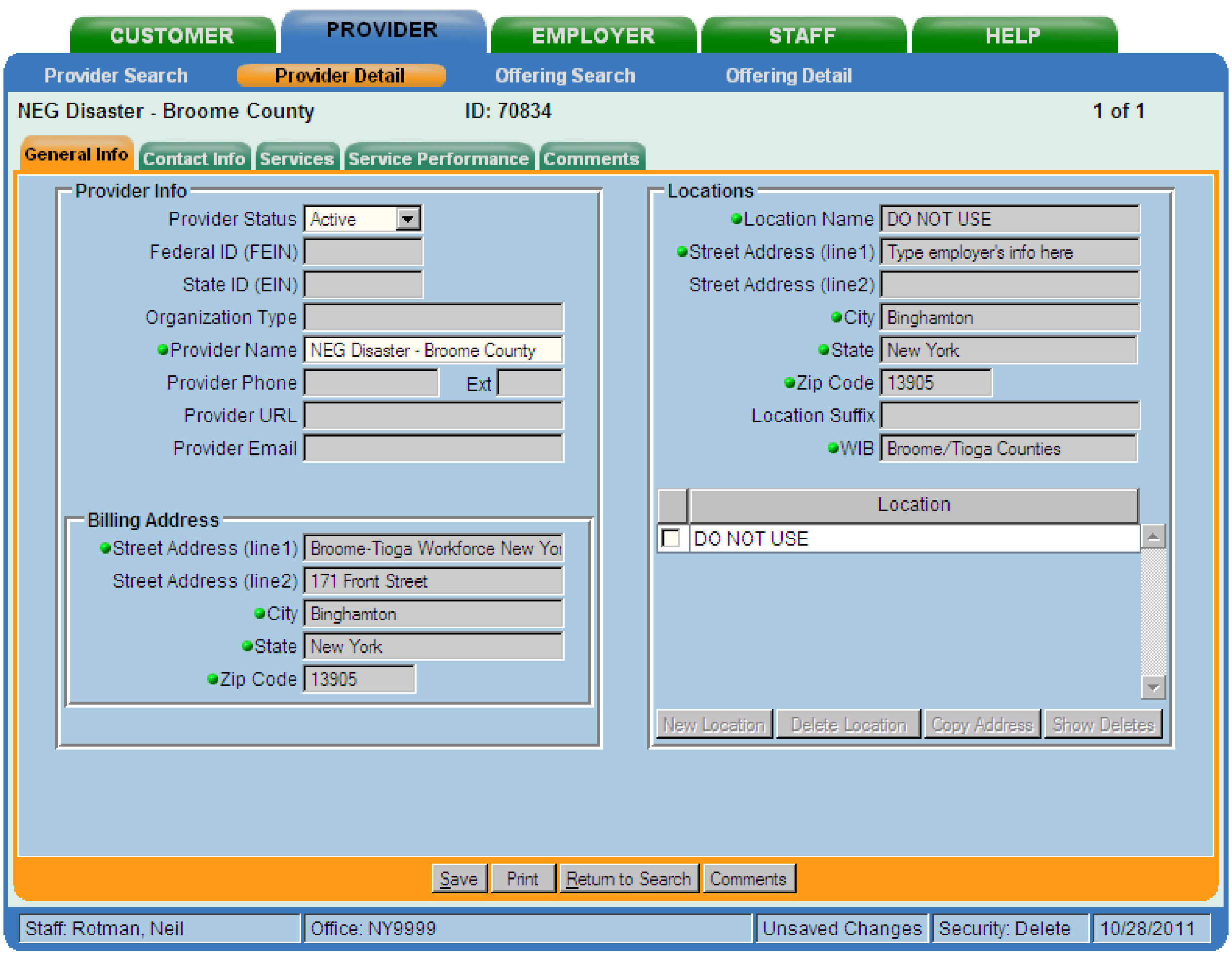
PROVIDER MODULE

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)**"

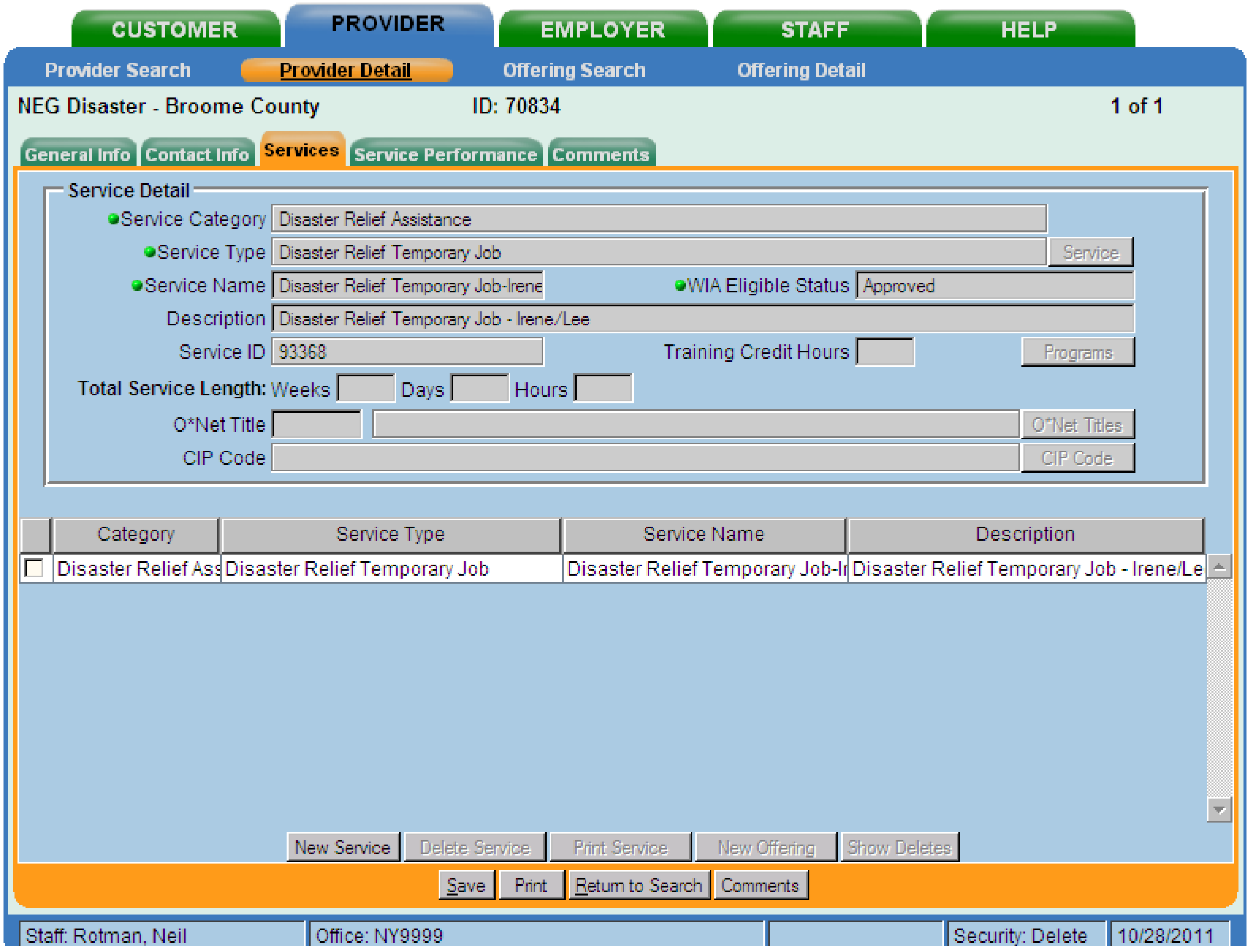
The screen shot below shows the Provider for Broome County. The Provider Name is "**NEG Disaster - Broome County**".

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.



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**".



Documenting Individuals Hired

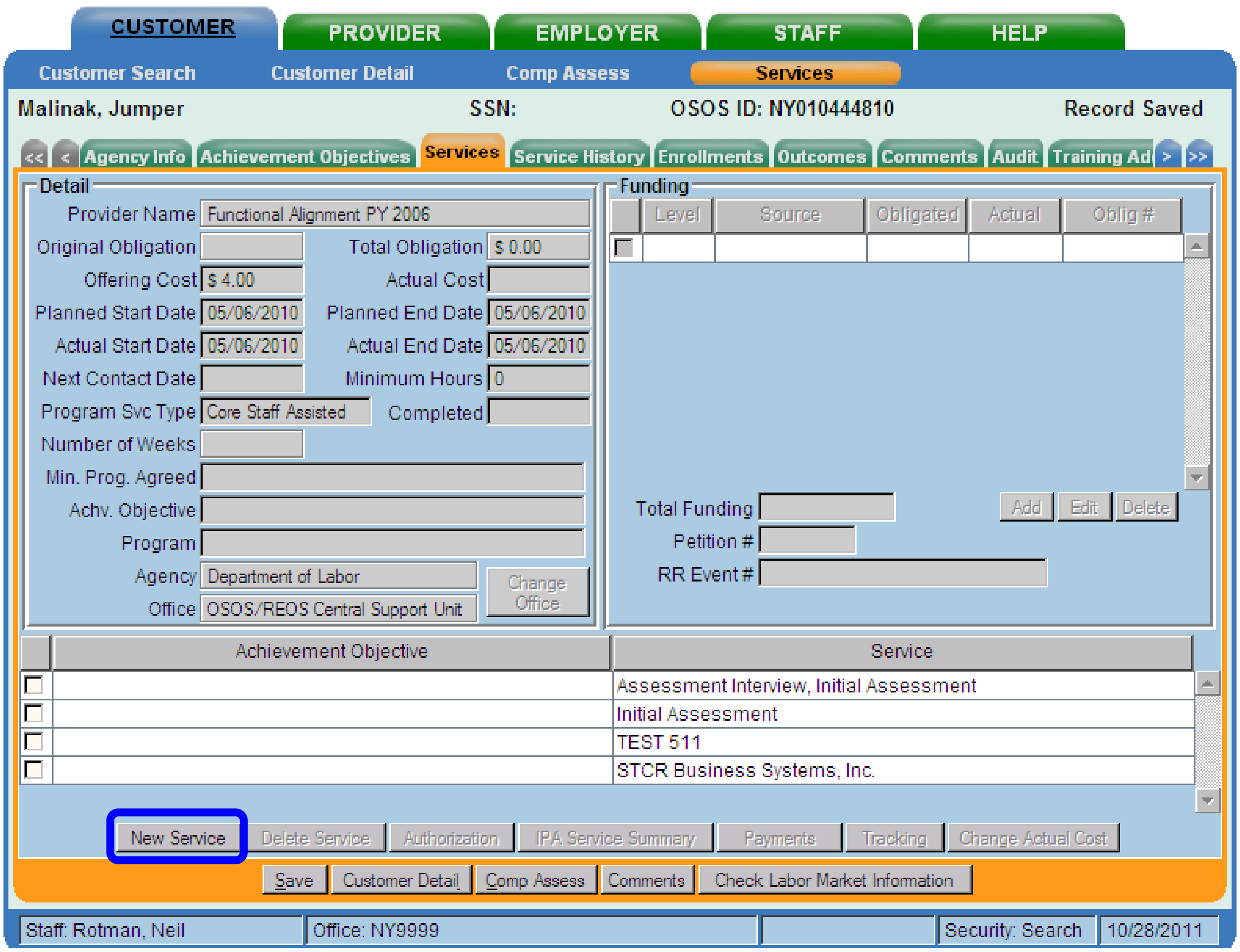
- One provider record will be setup for each of the 5 authorized counties.
- Each employer of record within the county will be entered as a Provider Location.
- One L2 service will be setup to record the "Job Placement".
- One service offering will be setup for each employer of record.
- The starting 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

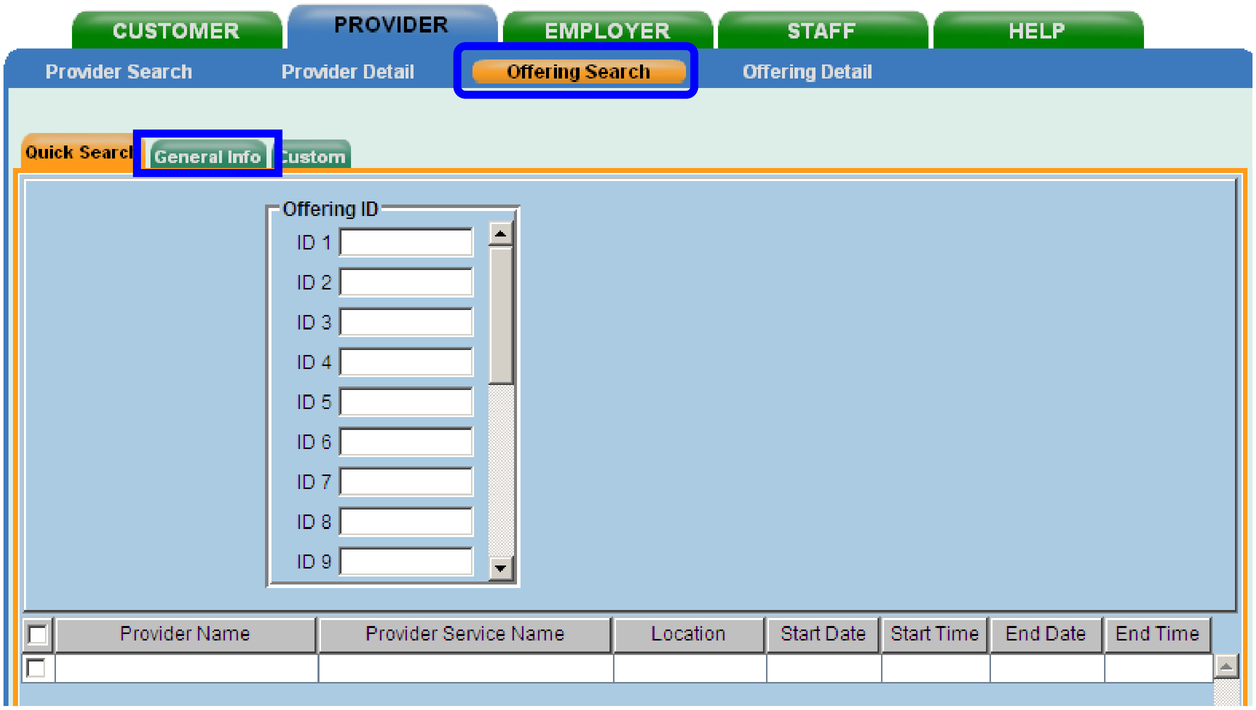
The **Services** module is where **WIA Level 2 services** are manually entered, and where some Activities are created as functionally aligned services.

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.



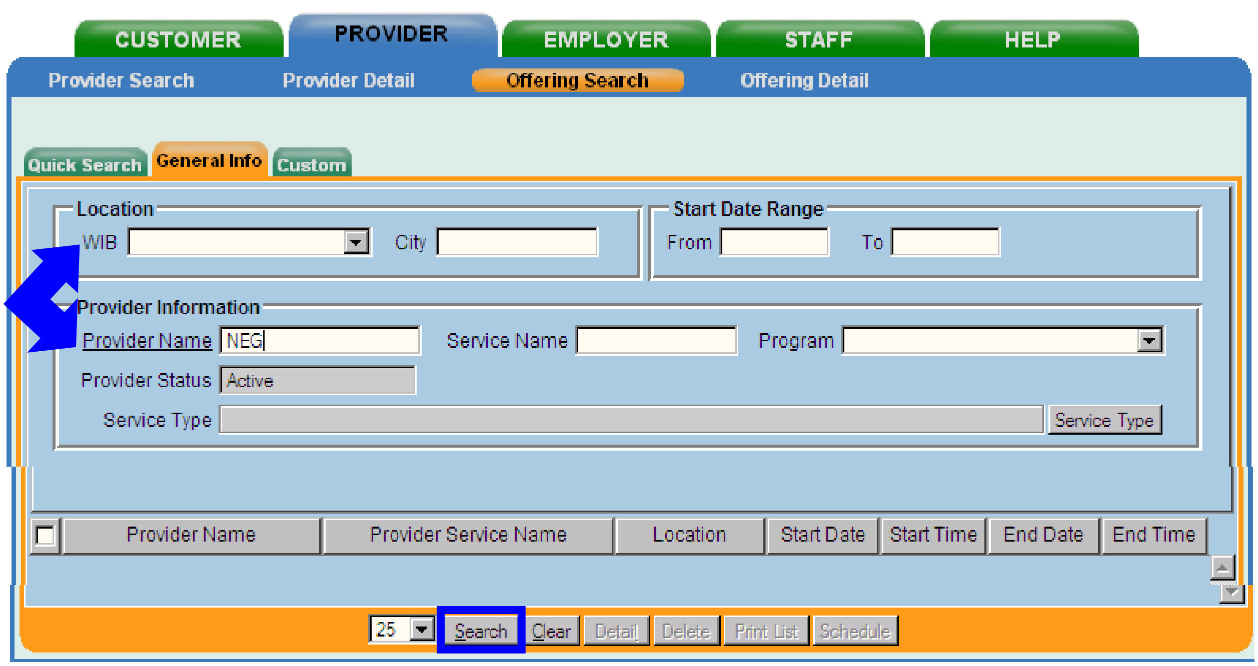
SERVICES (CONTINUED)

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



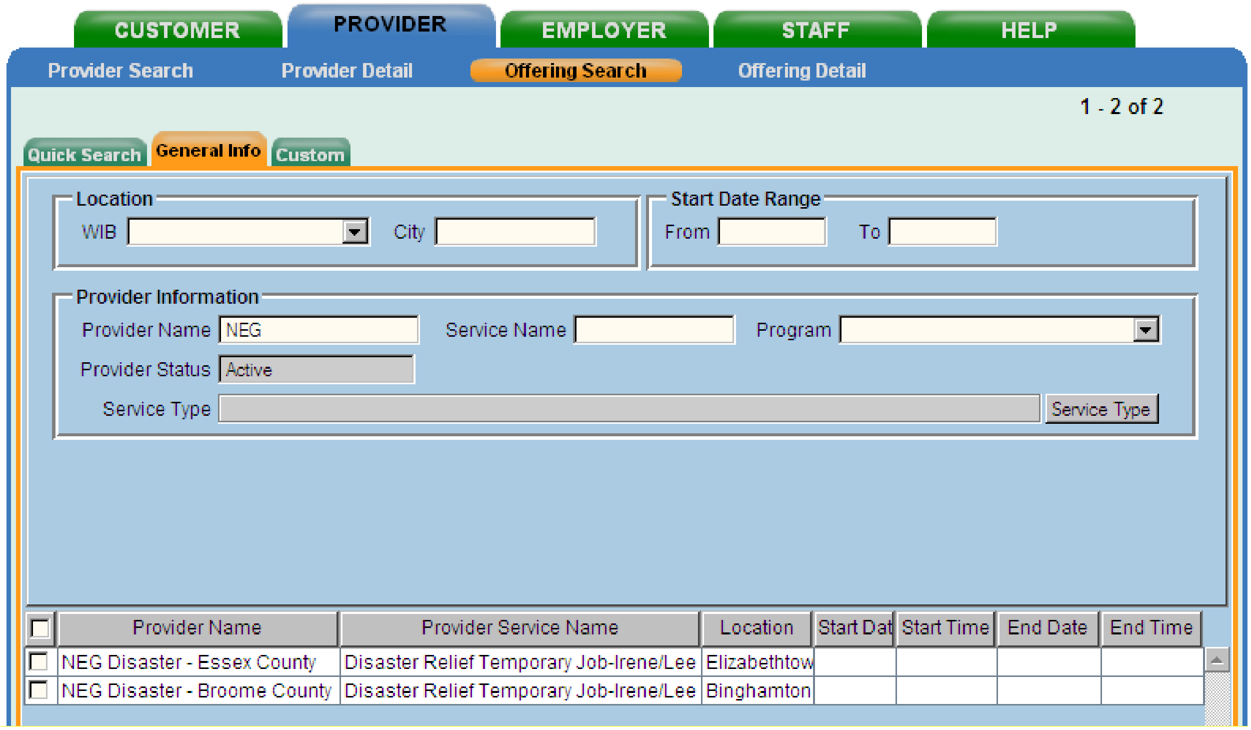
OSOS will automatically default to the LWIB that the user has logged into. If the customer will be placed in a county belonging to a different LWIB, then change the LWIB or leave blank.

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



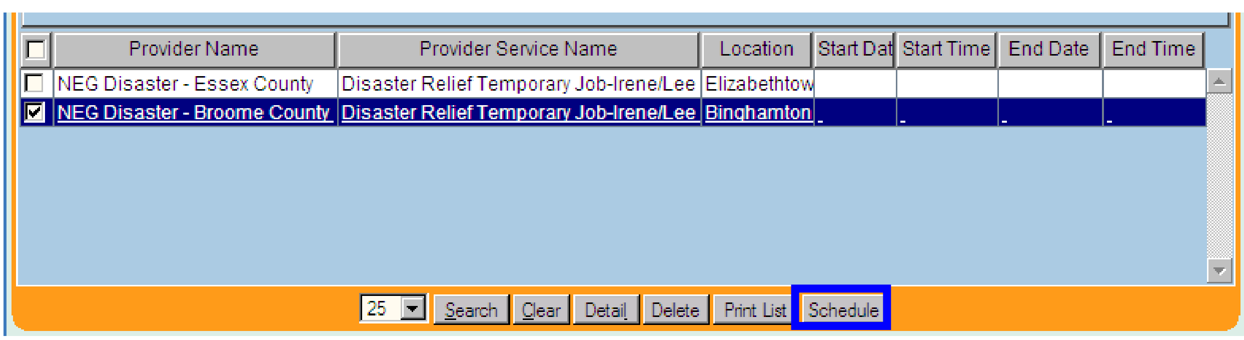
SERVICES (CONTINUED)

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



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.

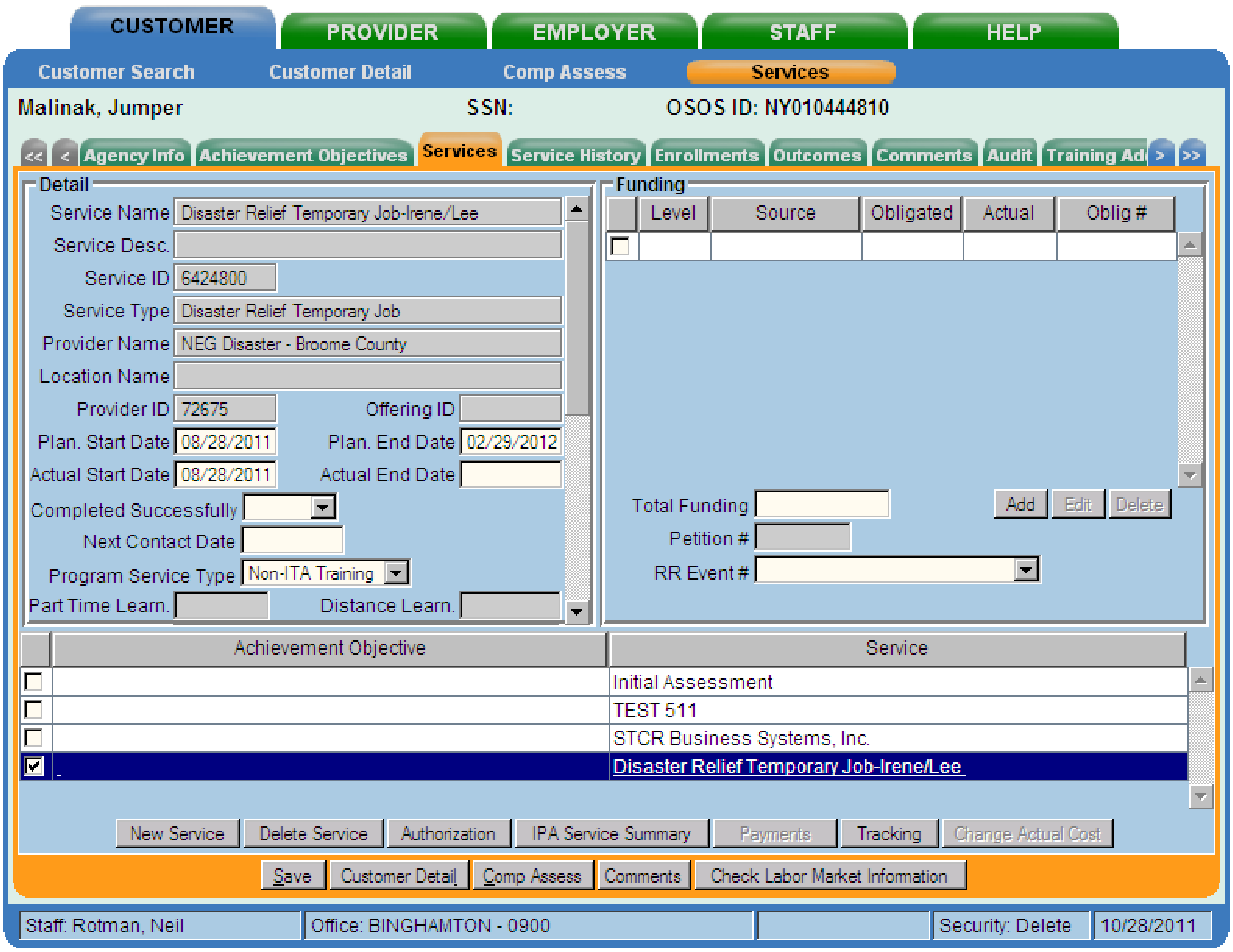
Remember that the Provider Name must list the county that referred the jobseeker and the location should list the city where the Employer of Record is located.



SERVICES (CONTINUED)

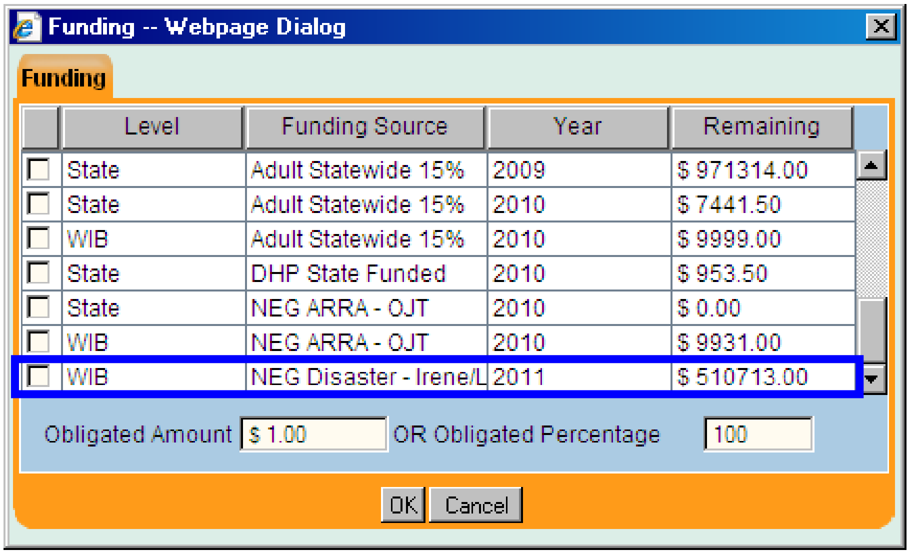
You will now be redirected back to the Services tab of the customer record. The Service Name, Service Description, Service Type, Provider name and Location Name will all be automatically populated from the Provider, Service, and Offering you had selected. Review the information in the Service screen 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.

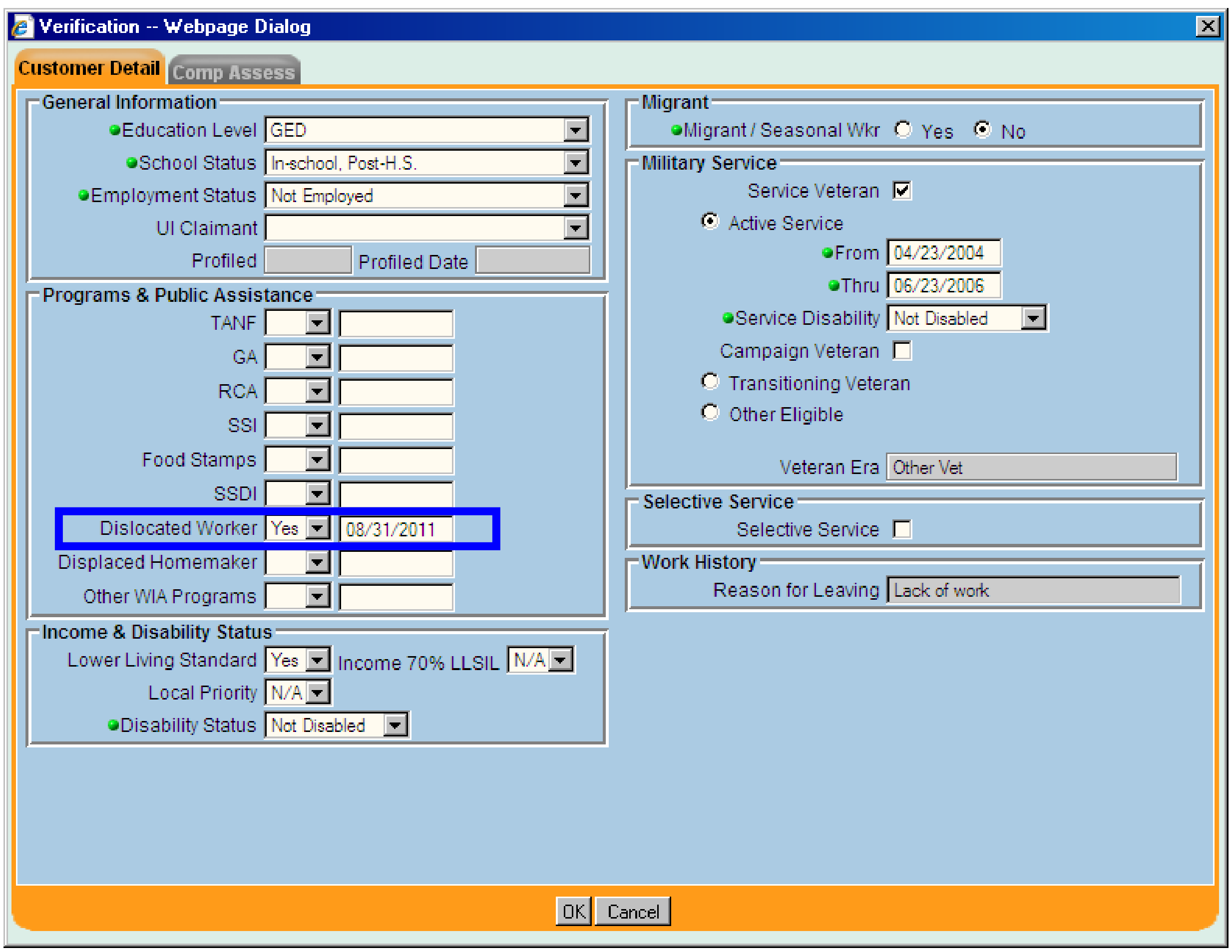


Funding

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



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.



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