Non-Service Event Button - OSOS Guide

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PURPOSE

OSOS is the primary case management system used for tracking all services provided to customers throughout the Workforce Development System.

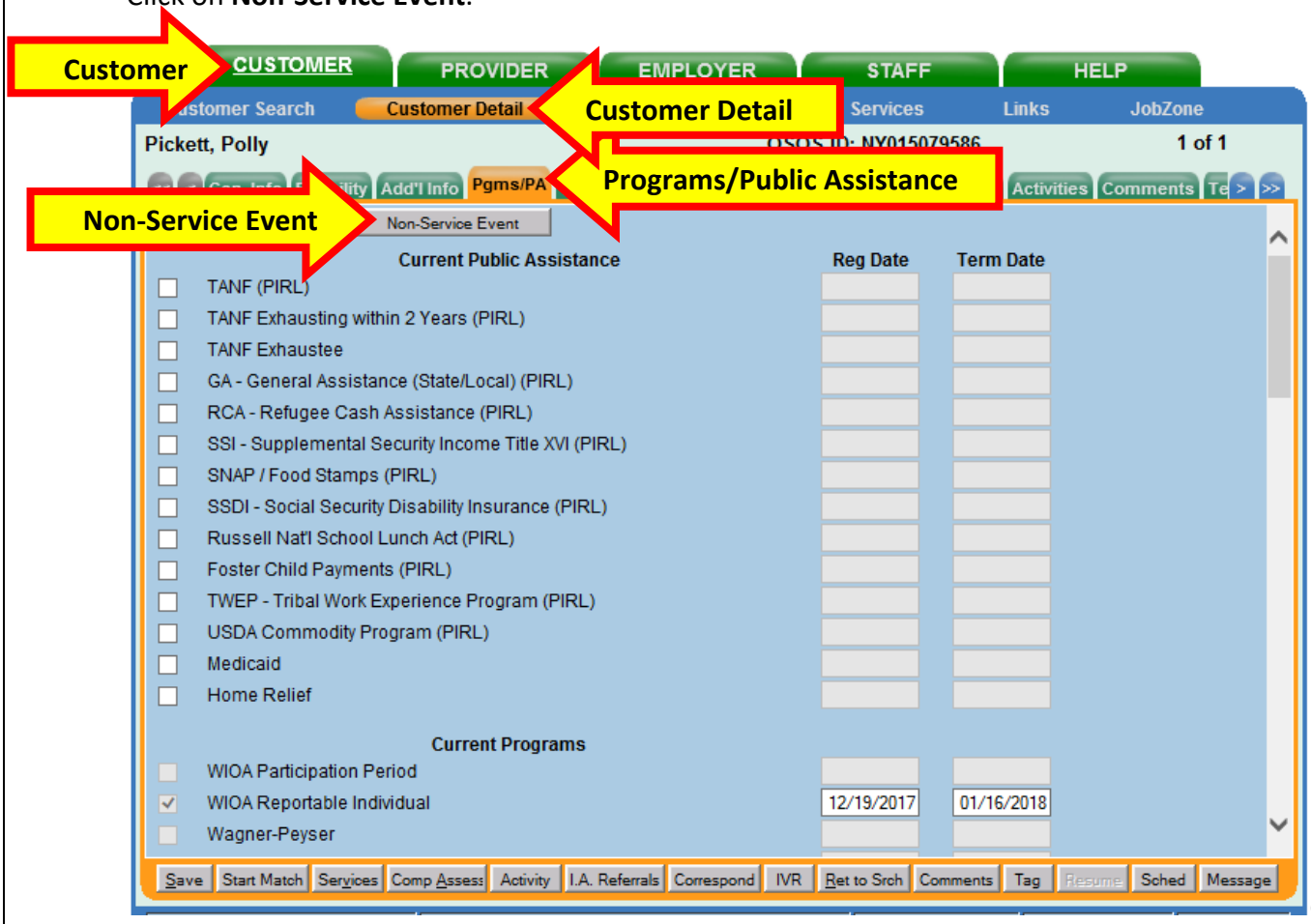
This guide is intended to walk staff through the process and the impacts of recording a Non-Service Event in a customer's OSOS record. It will also provide guidance on when it will appropriate to record each of the Events.

RECORDING A NON-SERVICE EVENT

The Non-Service Event button is designed to be a way for staff to record customer circumstances that may impact or restrict the services that could be provide to the customer in the Career Centers.

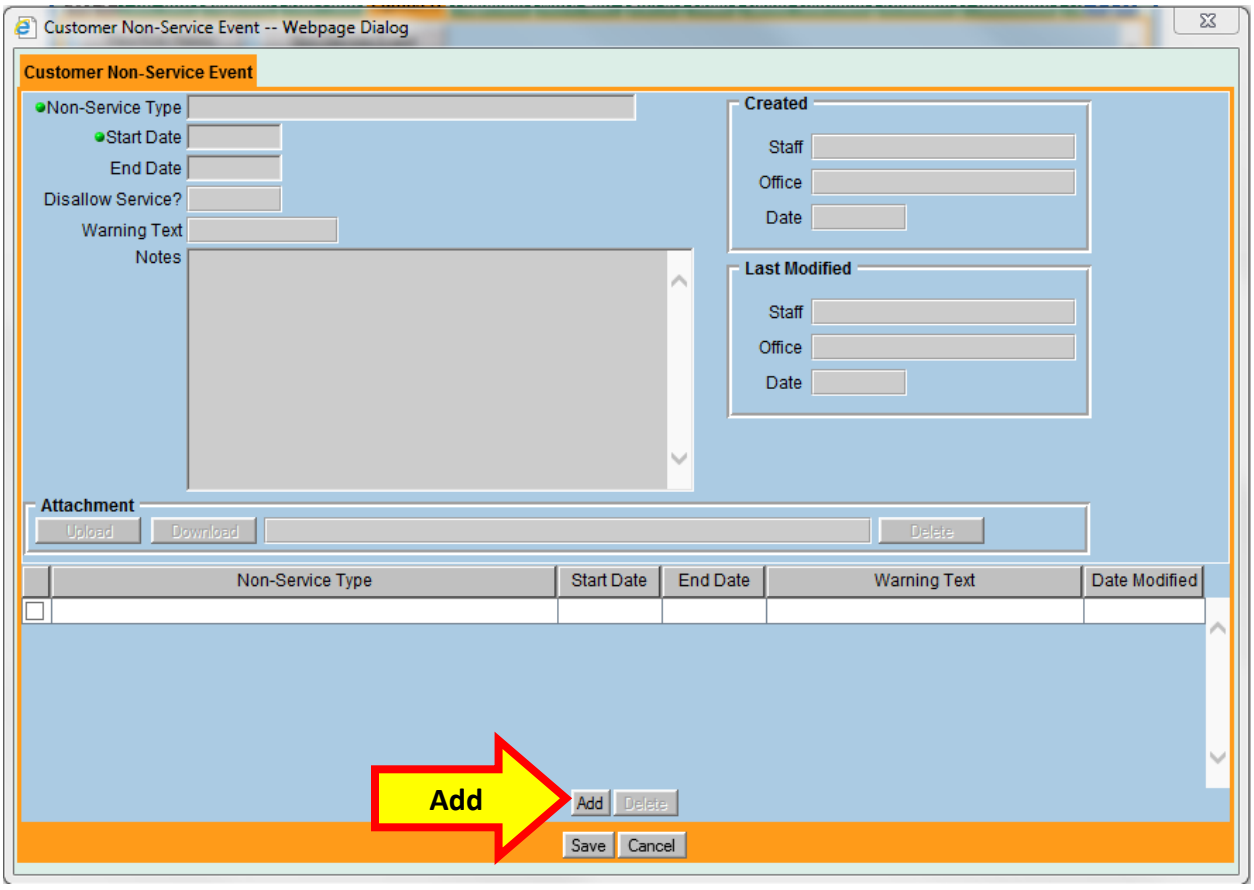
Non-Service Events are recorded in the **Customer** module. Within the **Customer Detail** window, select the **Programs / Public Assistance** tab.

Click on **Non-Service Event**.



This will bring up the **Customer Non-Service Event** dialog box.

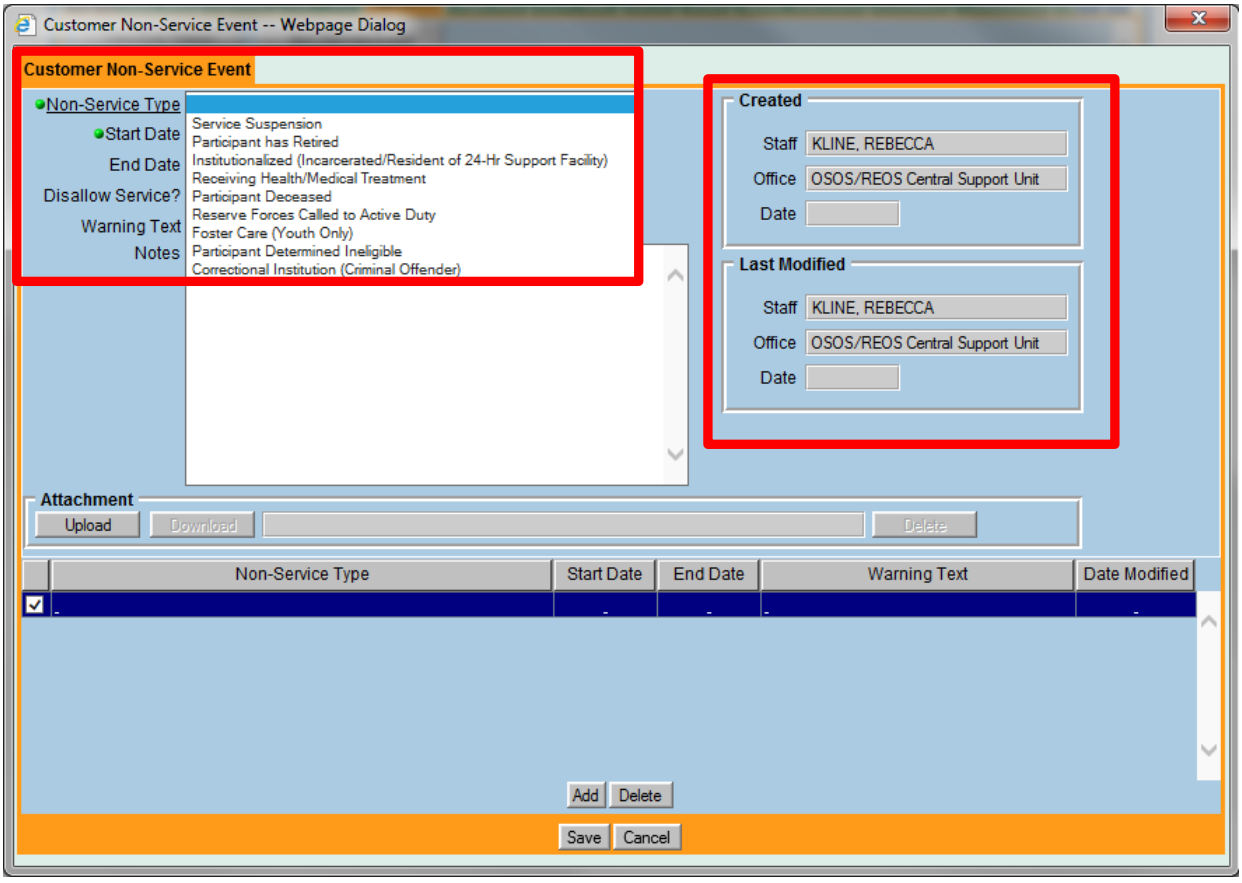
To record a Non-Service Event in the customer's record, click the **Add** button at the bottom of the box.



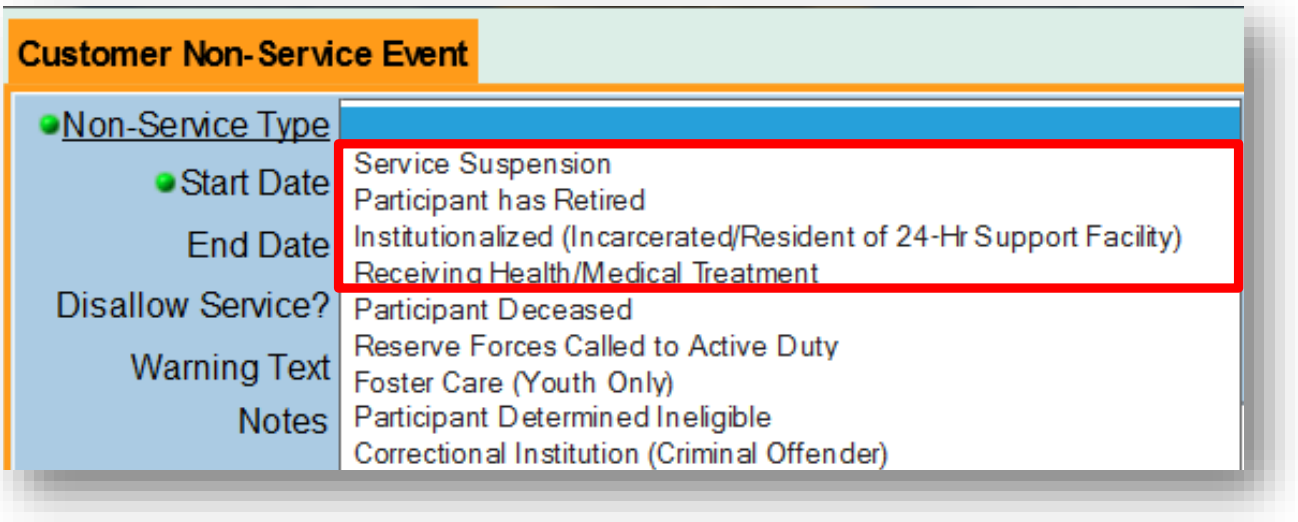
Now the dialog box is active and information can be entered.
The boxes on the right side of the pop-up will be automatically populated with name and office of the staff member creating or modifying this customer's Non-Service Event screen.

Once the event is saved, the date will populate automatically here as well.

Click the **Non-Service Type** drop-down menu to select the type of Non-Service Event to be recorded.



There are nine events that may be recorded as a Non-Service Event.



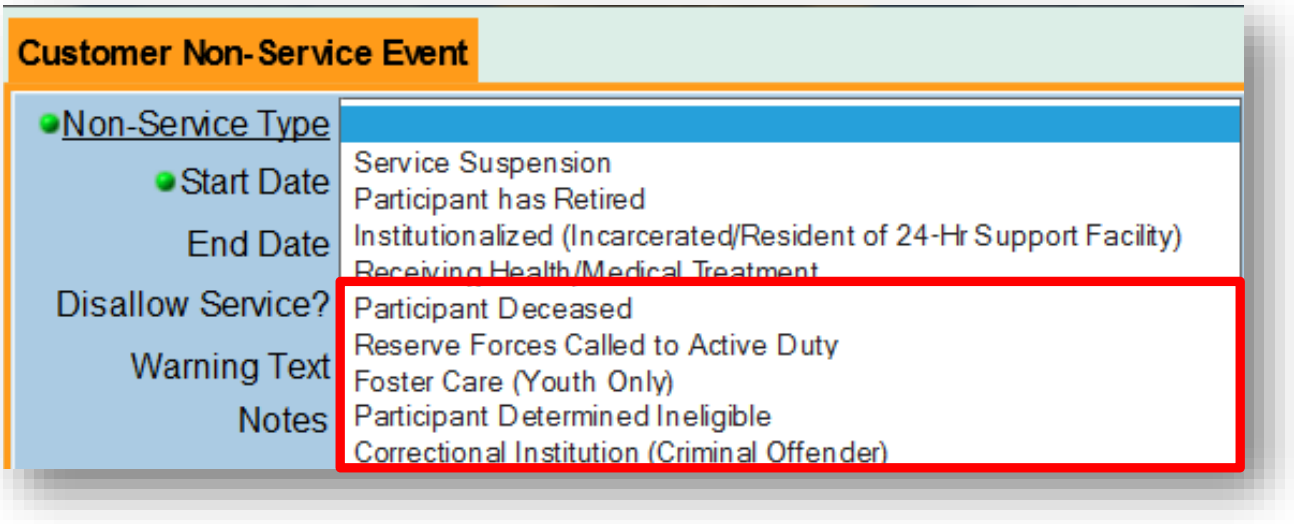
1. **Service Suspension**. This event should be recorded at the time that the customer is informed by Career Center leadership of their suspension from the Career Center. Staff should never record this event unless they are directed to do so by supervisory staff.

Please note: Managers and supervisors should continue to follow the guidance in the Disruptive Customer Policy. DEWS management must still be contacted immediately and an Unusual Incident Report (UIR) must still be filed following any disruptive customer situation in the Career Center.

2. **Participant has Retired**. Staff should record this event when they are informed that the customer has retired from the workforce.

3. **Institutionalized (Incarcerated/Resident of 24 Hour Support Facility)**. This should be recorded if the customer has become a resident of an institution or facility providing 24-hour support, such as a hospital or treatment center, during the course of receiving services.

4. **Receiving Health/Medical Treatment**. This event should be recorded if the customer is receiving medical treatment that precludes them from entering unsubsidized employment or continued participation in services. It's important to note that this should only be recorded if the treatment is expected to last longer than 90 days.



5. **Participant Deceased**. Staff should record this event when they are informed that the customer has passed away.

6. **Reserve Forces Called to Active Duty**. This should be recorded for a customer who is a member of the National Guard or other reserve military unit of the armed forces and is called to active duty for at least 90 days.

7. **Foster Care (Youth Only)**. This should be recorded when the participant is in the foster care system and exits the program because the participant has moved from the local workforce area as part of such a system. This should only be recorded for customers enrolled in the Title 1 Youth Program.

8. **Participant Determined Ineligible**. Career Center staff should not select this option, as it refers to eligibility to the Vocational Rehabilitation program only.

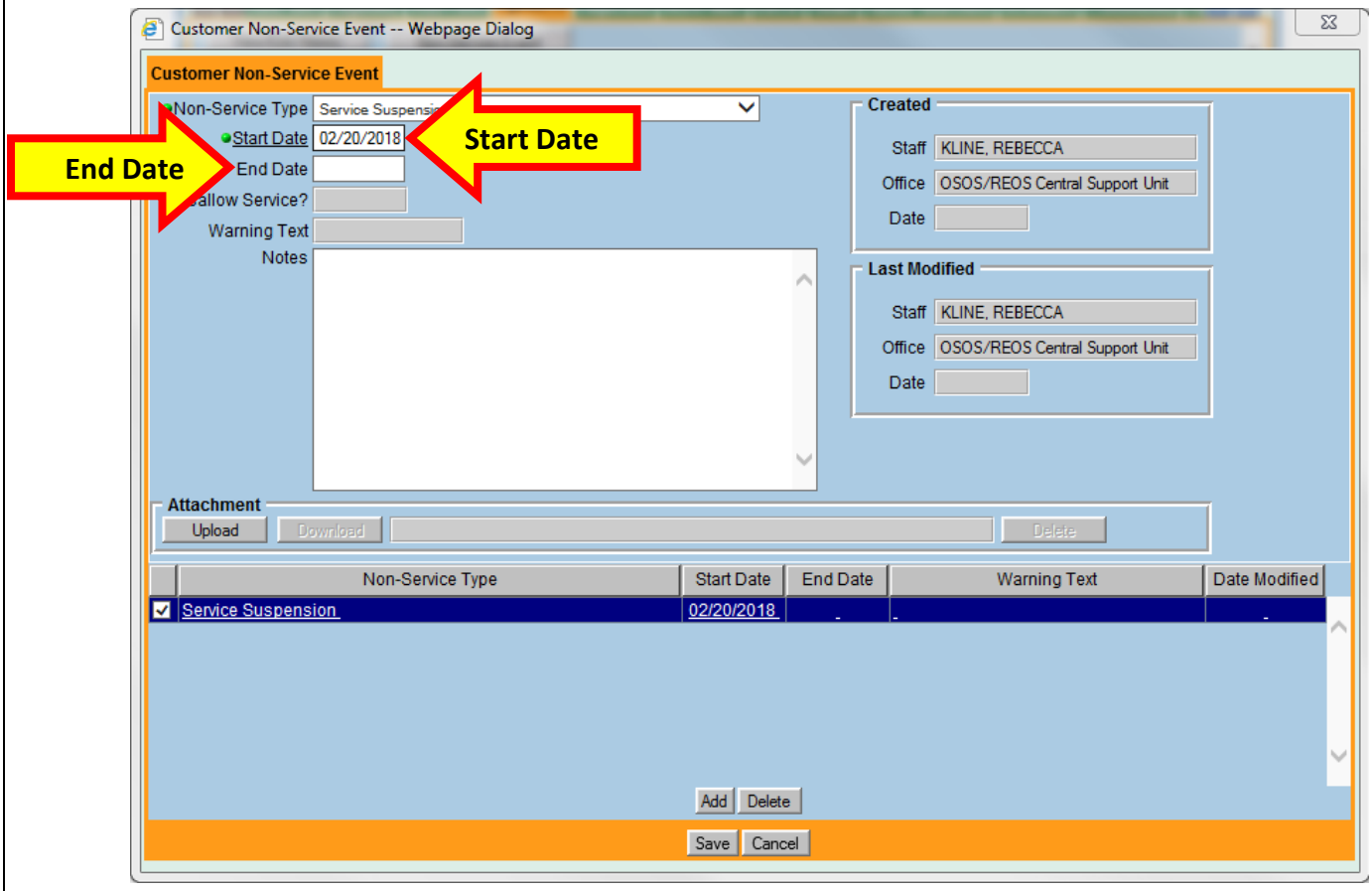
9. **Correctional Institution (Criminal Offender).** This should be recorded for a customer who has become incarcerated in a correctional institution.

The selected Non-Service type will populate in the bottom half of the dialog box.

Enter a **Start Date** for the event.

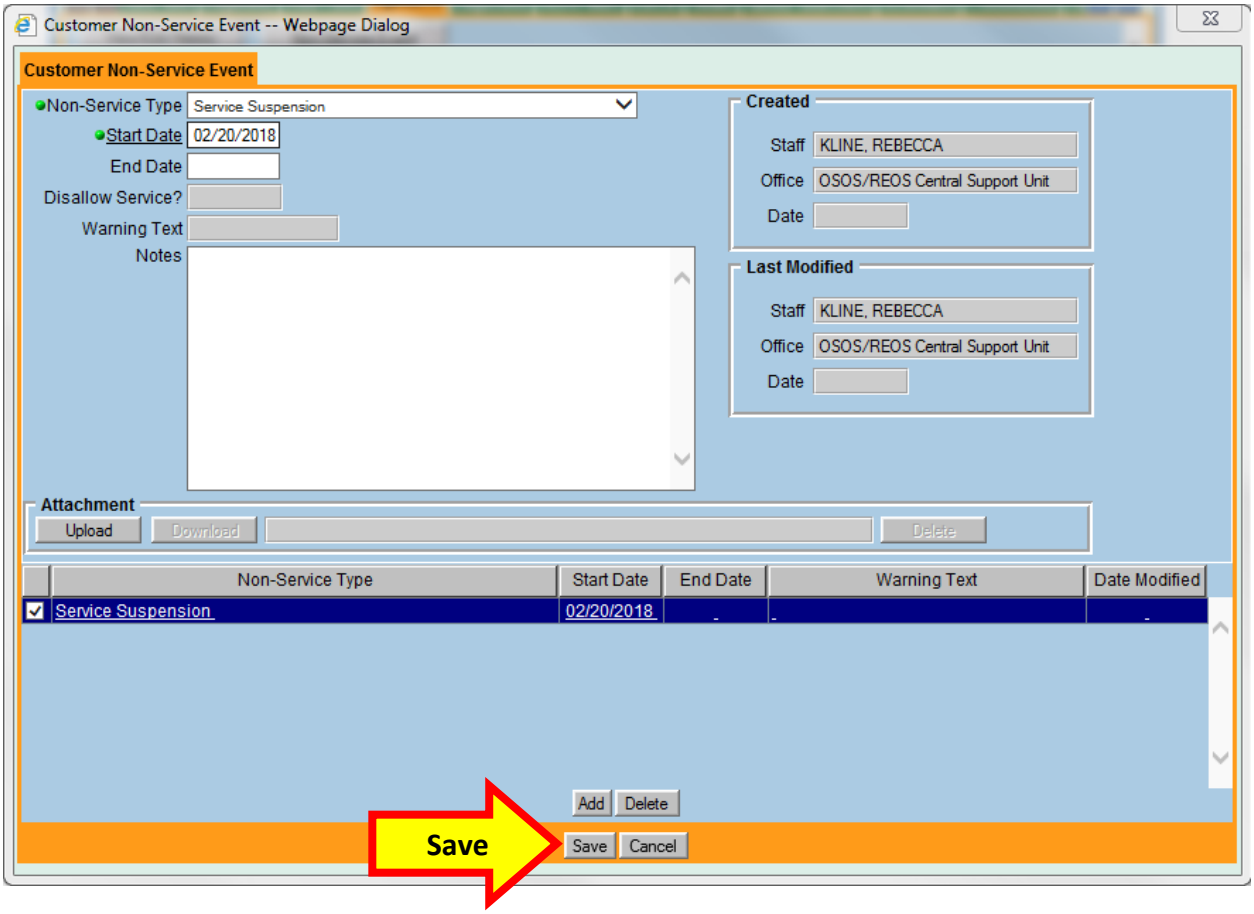
Staff may also enter the **End Date** if known, except in the case of a Service Suspension. Service suspension End Dates should never be entered by Career Center staff. Central Office staff will enter in the End Date in OSOS when a customer's suspension has ended.

Staff may enter other relevant information in the **Notes** text field. Notes entered in the Non-Service Event dialog box will not display in the customer's Comments tab, so details of the suspension or event must also be recorded in a case note using the Comments feature of OSOS.



Please note, while there is an Upload button to attach a document to an Event, staff should not use this function until further guidance has been provided regarding appropriate use.

When the form is complete, click **Save** at the bottom of the dialog box.

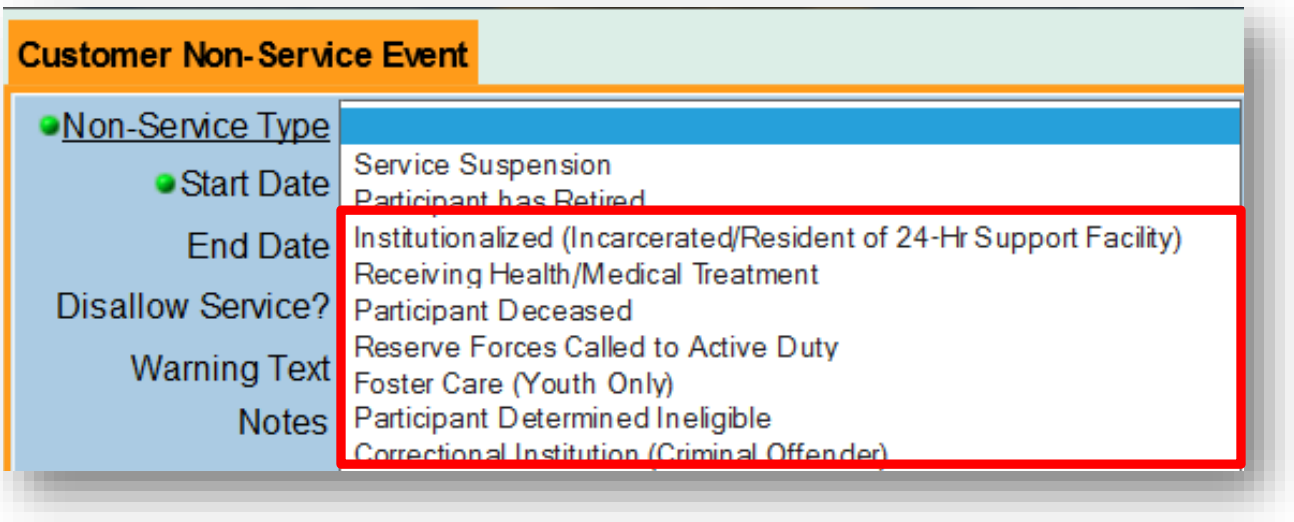


ACTIVITIES AND SERVICES

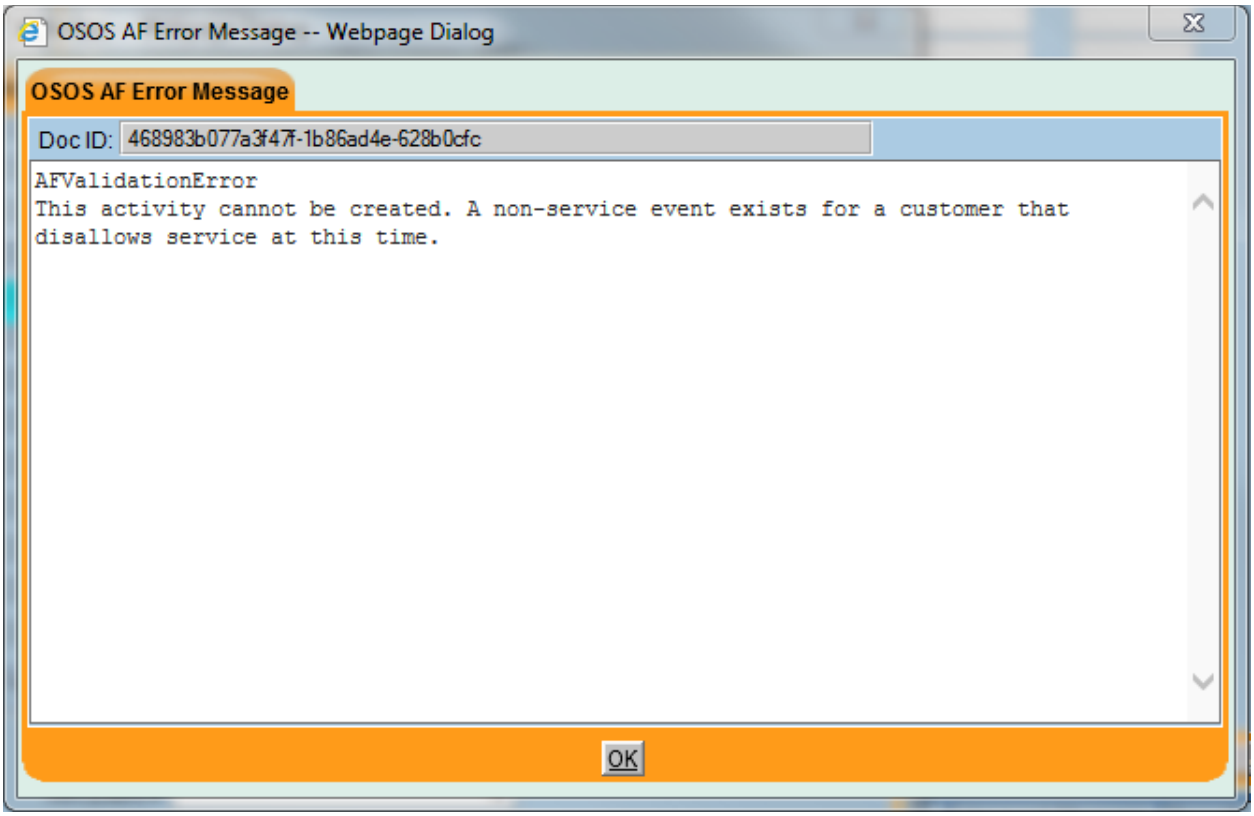
Most Non-Service Events will prevent activities from being added to the customer record. These events will also require that any open service, or services with dates which overlap the dates of the Non-Service event, be edited before the Event will save.

These events are:

- Institutionalized
- Receiving Health/Medical Treatment
- Participant Deceased
- Reserve Forces Called to Active Duty
- Foster Care (Youth Only)
- Participant Determined Ineligible
- Correctional Institution (Criminal Offender)

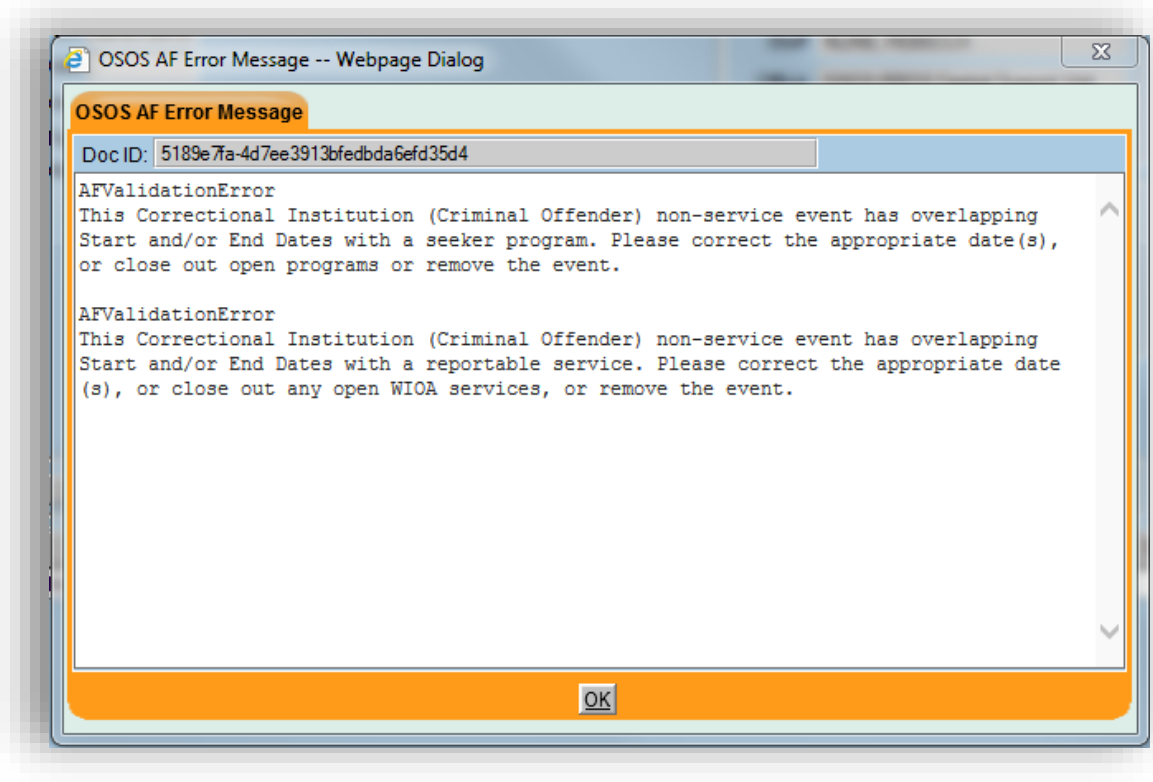


When these Events are current in a customer record, staff will see the following error if they attempt to add an activity:



If staff attempt to save one of these Events while the customer has an open or overlapping service, an OSOS pop-up error will advise them of this.

Staff must then navigate to the Services window of the customer record and take the appropriate action.

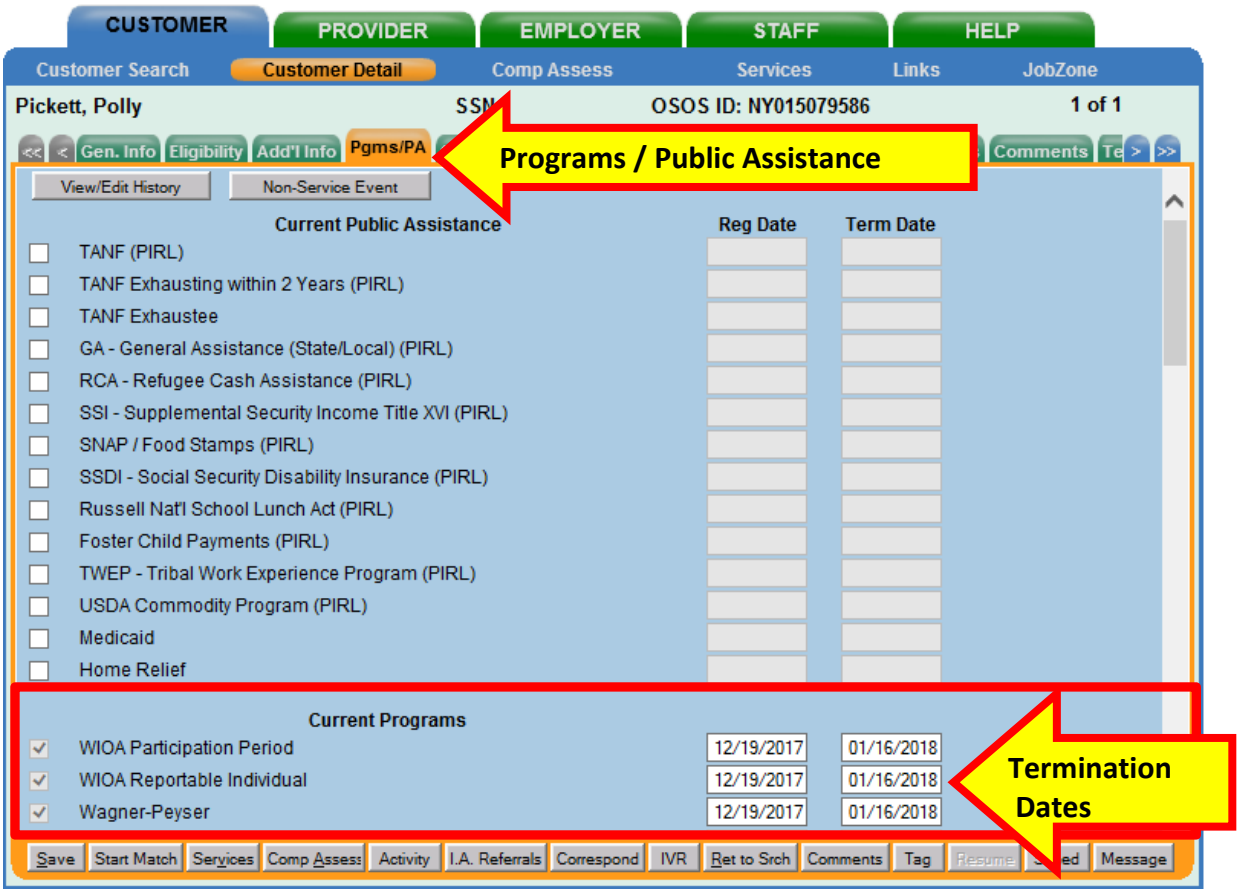


Service Suspension and Participant has Retired are the only two Events that can be saved while there are open or overlapping services in the customer record. These two Events will still allow staff to add activities to the customer record while the Event is active.

Non-Services Events may terminate some current programs on the customer's Programs / Public Assistance tab. This occurs when the Event recorded means that the customer is no longer a participant for WIOA purposes.

Suspension and Retirement do not impact these fields. Customers who have been suspended from the Career Center or who have decided to retire are still considered participants under WIOA.

However, the other Events are considered to be exclusions to WIOA reporting and will terminate the customer's WIOA participation period. The Termination Date on the Programs/Public Assistance tab will auto populate with the last date the customer was given an enrolling service and this customer will be excluded from all performance measures.

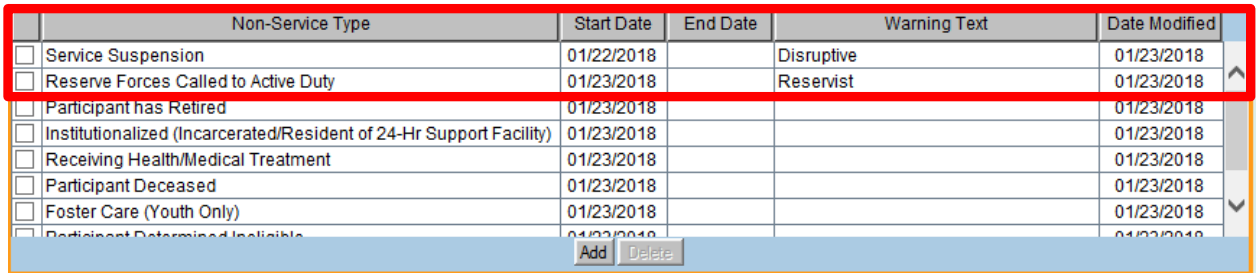


The history of all recorded Non-Service Events will be visible by clicking on the **Non-Service Event** button in the customer's **Programs / Public Assistance** tab.

There are two types of events that will also display Warning Text in other places within the customer record during the dates that they are active for the customer.

These two events are the Service Suspension event and the Reserve Forces Called to Active Duty event.

Service Suspension will display the word "**Disruptive**" and Reserve Forces Called to Active Duty will display the word "**Reservist**" in two other places in the customer record.



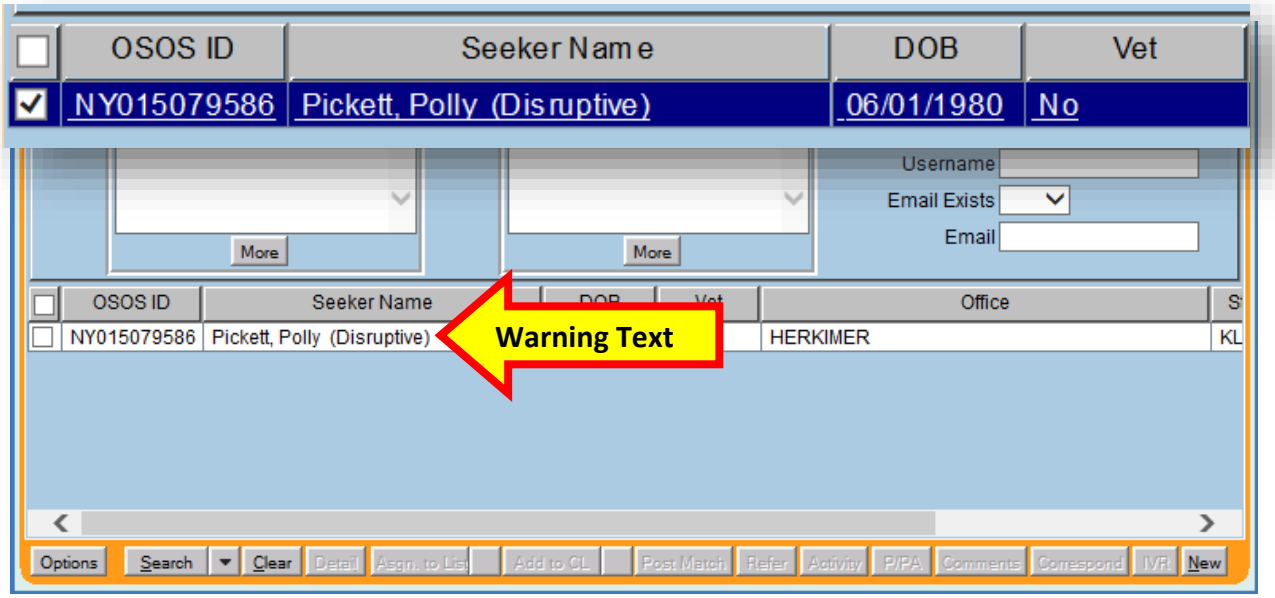
	Non-Service Type	Start Date	End Date	Warning Text	Date Modified
☐	Service Suspension	01/22/2018		Disruptive	01/23/2018
☐	Reserve Forces Called to Active Duty	01/23/2018		Reservist	01/23/2018
☐	Participant has Retired	01/23/2018			01/23/2018
☐	Institutionalized (Incarcerated/Resident of 24-Hr Support Facility)	01/23/2018			01/23/2018
☐	Receiving Health/Medical Treatment	01/23/2018			01/23/2018
☐	Participant Deceased	01/23/2018			01/23/2018
☐	Foster Care (Youth Only)	01/23/2018			01/23/2018
☐	Participant Determined Ineligible	01/23/2018			01/23/2018

Add Delete

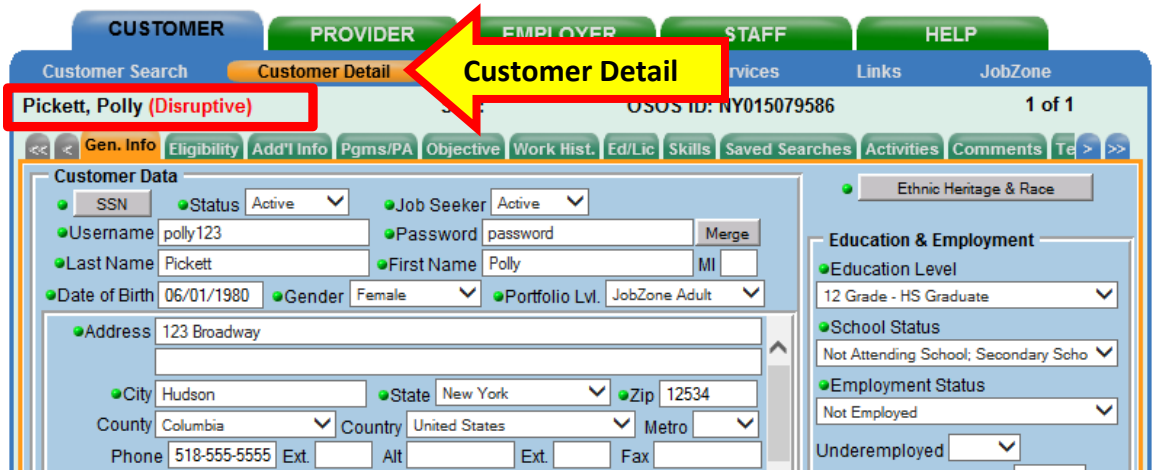
Warning Text is displayed in the customer search results.

When the Suspended event is active in a customer record, you will be able see (Disruptive) next to the customer's name in the customer search results.

When the Reserve Forces Called to Active Duty event is active in a customer record, you will be able see (Reservist) next to the customer's name in the customer search results.



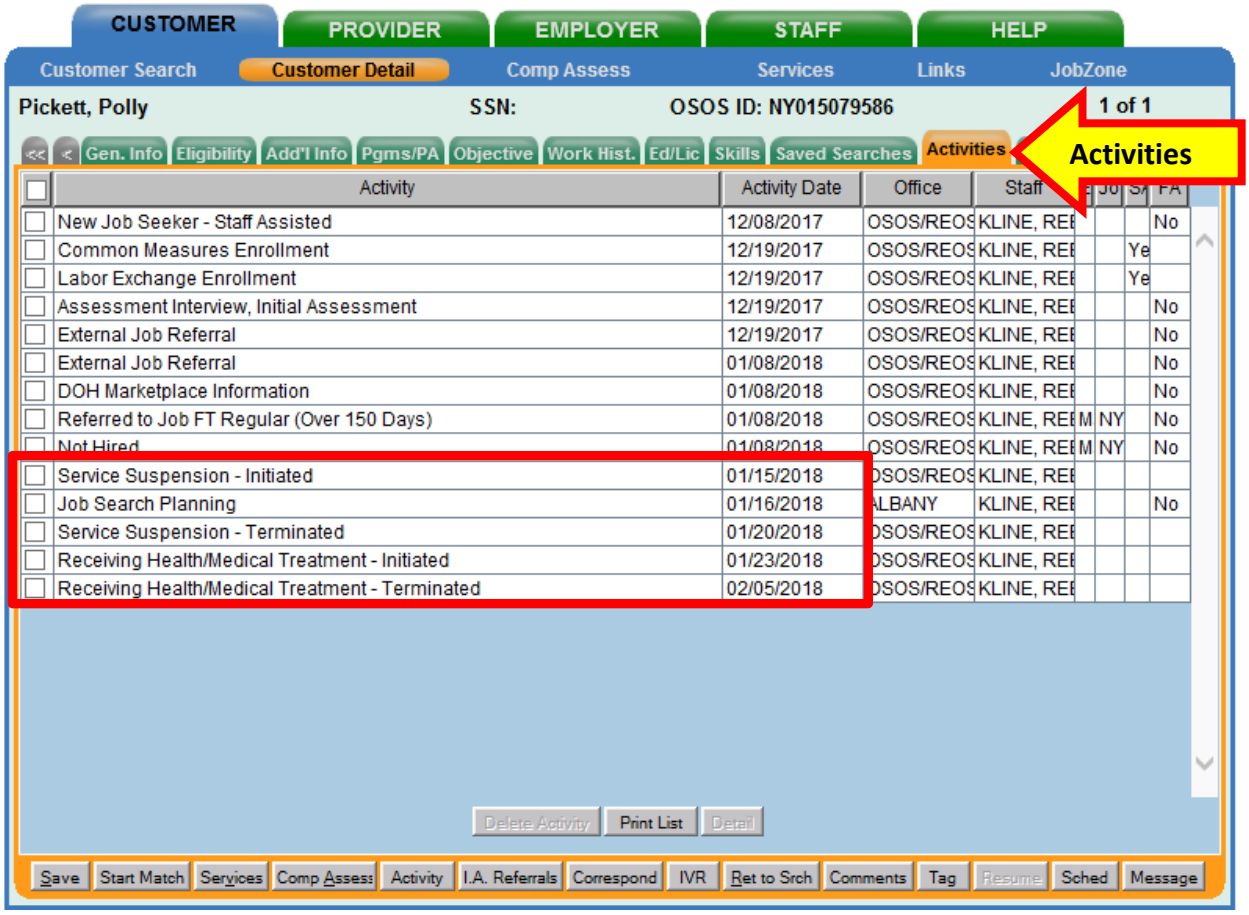
Warning Text is also displayed in in the **Customer Detail** window, next to the customer's name.



Recording a Non-Service Event will automatically add corresponding activities to the customer's Activities tab.

The Start Date of an Event will add an "**Initiated**" activity.

The End Date of an Event will add a "**Terminated**" activity.



RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found at:

http://labor.ny.gov/workforcenypartners/osos.shtm

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: help.osos@labor.ny.gov