

Comprehensive Assessment and Supplemental Data OSOS Guide



TABLE OF CONTENTS

PURPOSE AND BACKGROUND	2
CUSTOMER DETAIL WINDOW	3
INCOME INFO	4
DISABILITY INFO	4
MIGRANT INFO.....	5
CURRENT PUBLIC ASSISTANCE	7
COMPREHENSIVE ASSESSMENT WINDOW	8
EMPLOYMENT TAB.....	8
EDUCATION TAB.....	10
FAMILY TAB.....	12
LEGAL TAB.....	14
HOUSING TAB.....	15
TRANSPORTATION TAB	16
ACTIVITIES AND COMMENTS	17
COMPREHENSIVE ASSESSMENT ACTIVITY	19
RESOURCES AND ASSISTANCE	20



PURPOSE AND BACKGROUND

The One-Stop Operating System (OSOS) is the primary case management system used for tracking all services provided to customers throughout the Workforce Development System. OSOS collects substantial information from customers, businesses, and training providers. This information is also used to prepare required State and Federal reports.

The Comprehensive Assessment tab of the One Stop Operating System (OSOS) allows staff to record personal information from customers that is more sensitive in nature. Almost all staff should have access to this window in order to record barriers which are required to be collected by the Workforce Innovation and Opportunity Act (WIOA.)

This guide describes how staff can utilize the Comprehensive Assessment tab when serving adult and dislocated worker (DW) customers. It does not describe how staff can utilize the Comprehensive Assessment window when serving youth under the WIOA Youth Program.



CUSTOMER DETAIL WINDOW

Eligibility and employment barrier data related to, Income, Disability, Migrant/Seasonal Farm Work and Public Assistance is entered in the **Eligibility** tab, **Pgrms/PA** tab, and **Comp Assess** tab within the **Customer Detail** window. This information must be entered into the customer record before any enrolling services or activities are recorded.

The screenshot displays the OSOS Customer Detail window for MARY E. SMITH. The interface includes a navigation bar with tabs for General Info, Eligibility, Add'l Info, Resume Data, Planning, Comp Assess, Programs, Outcomes, Saved Searches, Services, Tests, Comments, Attachments, and Corrections. The Eligibility tab is active, showing fields for Income Info (Lower Living Standard, Income 70% LLSIL, 5% Rule/Local Priority, High Poverty Area), Disability Info (Disability Status, Disability Category, Financial Capability), Programs (HVRP and INAP), and Migrant Info (Migrant/Seasonal Worker).

Customer Search: Customer Detail Logout

SMITH, MARY E. SSN: ***-**-8689 OSOS ID: NY008468863 1 of 2

General Info Eligibility Add'l Info Resume Data Planning Comp Assess Programs Outcomes Saved Searches Services Tests Comments Attachments Corrections

Eligibility

Income Info

- Lower Living Standard: Not Disclosed
- Income 70% LLSIL: Yes
- 5% Rule/Local Priority: No
- High Poverty Area: No

Disability Info

- Disability Status: Disabled
- Disability Category: Hearing Vision Mental Mobility Cognitive/IDD Learning Chronic Health Not Disclosed
- Financial Capability - has a receipt and has received: Benefit Planning Services Financial Capability/Asset Development Services

Programs

- HVRP - Homeless Veterans Reintegration Program
HVRP Grantee Svc Provider: [Dropdown]
HVRP Grantee Svc Provider #2: [Dropdown]
Reason: [Dropdown]
HVRP Grantee Svc Provider #3: [Dropdown]
Reason: [Dropdown]
- INAP - Indian and Native American Programs
BearTracks Software Version: [Text Field]
Tribal Code: [Text Field] Tribal Affiliation: [Text Field] [Lookup]

Migrant Info

- Migrant/Seasonal Worker: Yes No

Save Start Match [M] Activity [A] I.A. Referrals [R] Correspond [C] IVR [V] Links [L] Ret To Srch [Q] Comments [C] Tag [T] Schedule [S]

WIOA Eligibility [W] Summary [U] JobZone [J] Reload [R] Custom [C]



INCOME INFO

WIOA defines the term “low-income individual” as one who qualifies under various criteria, including an individual who received income for the six-month period prior to application for the program involved, that does not exceed the higher of the poverty line, or 70% of the Lower Living Standard Income Level.

Determine the customer's income eligibility for services using either the 70% Lower Living Standard Income Level (LLSIL) or the 100% of Poverty Income Guidelines tables. All staff must use current Poverty Income and LLSIL guidelines to determine eligibility for services. Current tables can be found under Income Eligibility Guidelines located on the Programs & Tools for Workforce Professionals section of the NYSDOL website. If the customer is eligible, select "Yes" from either the Lower Living Standard (Poverty guidelines) or the Income 70% LLSIL (LLSIL Guidelines) drop-down, but not both.

The Local Priority income information is established by the local Workforce Development Board. This category is only used if the customer does not meet the LLSIL or 70% LLSIL. Discuss this element with your manager to see if this is relevant for your Center.

High Poverty Area is a required data field for the Youth program and customers 25 years of age or younger. This information can be found in TEGL #21-16 and is pulled from the census.

DISABILITY INFO

Disability under WIOA is defined as, having a physical or mental impairment that substantially limits one or more of your major life activities. Select the appropriate Disability category or categories based on the customer self-attestation of disability.

Disability Info

*Disability Status
Disabled

*Disability Category

Hearing Vision Mental Mobility

Cognitive//DD Learning Chronic Health

Not Disclosed

Financial Capability - has a receipt and has received:

Benefit Planning Services

Financial Capability/Asset Development Services

Reason

HVRP Grantee Svc Provider #3

Reason

INAP - Indian and Native American Programs
BearTracks Software Version

Tribal Code Tribal Affiliation

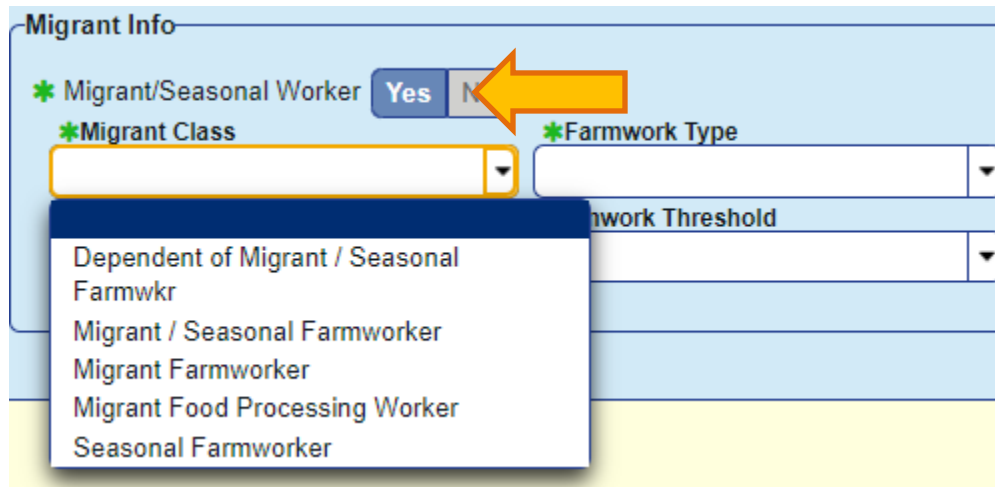
Migrant Info

* Migrant/Seasonal Worker Yes No

MIGRANT INFO

The **Migrant Info** fields pertain to migrant and/or seasonal farm workers.

If the customer indicates, they are a migrant or seasonal farm worker select "Yes." Once this field is checked the additional required fields will appear, you will need to select the Class and Farmwork Type.



The drop-down options for the **Class** field that may pertain to staff data entry include:

- Migrant /Seasonal Farmworker
- Migrant Farmworker
- Migrant Food Processing Worker
- Seasonal Farmworker

Under WIOA a Seasonal Farmworker is, someone who is or was employed in the past 12 months in farm work of a seasonal or other temporary nature and who can return to their permanent place of residence in the same day. This does not include non-migrant individuals who are full-time students. A Seasonal Farm Worker is an individual that works on a farm (this does not include jobs such as bus driver, landscaper, etc. this is specific to farm work; harvesting, pruning, picking, etc.) the Farm Worker can return home every day after work, and they are part of the community. For example, a Seasonal Farm Worker would be an apple picker who lives in the Capital District and works in the Capital District, he picks apples during the harvest season, and can go home every night after his workday.

A Migrant Farm Worker is a Farm Worker that travels to the job site and cannot return to their permanent place of residence the same day. This does not include full-time students traveling



in organized groups rather than with their families. An example of a Migrant Farm Worker could be a worker from a different state, a domestic worker, for example an individual from Texas, Florida, or Puerto Rico, who travels to NY and works during the harvest season. This individual is unable to travel back home after they work for the day-most Migrant workers are provided housing on the farm by the farm owners. The key for a Migrant Farm Worker is that the individual cannot return home the same day they worked.

A Migrant Food Processor is defined in the same way a Migrant Farm Worker is defined under WIOA. However, this individual is processing food. For example, they may be processing apples to make apple cider.

General Info | **Eligibility** | Add'l Info | Resume Data | Planning | Comp Assess | Programs | Outcomes | Saved Searches | Services | Tests | Comments

Eligibility

Income Info

*Lower Living Standard: No
*Income 70% LL SIL: No
5% Rule/Local Priority: []

High Poverty Area: []

Disability Info

*Disability Status: Not Disabled

Programs

HVRP - Homeless Veterans Reintegration Program

HVRP Grantee Svc Provider: []
HVRP Grantee Svc Provider #2: []
Reason: []
HVRP Grantee Svc Provider #3: []
Reason: []

INAP - Indian and Native American Programs

BearTracks Software Version: []
Tribal Code: [] Tribal Affiliation: []
[] [Lookup]

Migrant Info

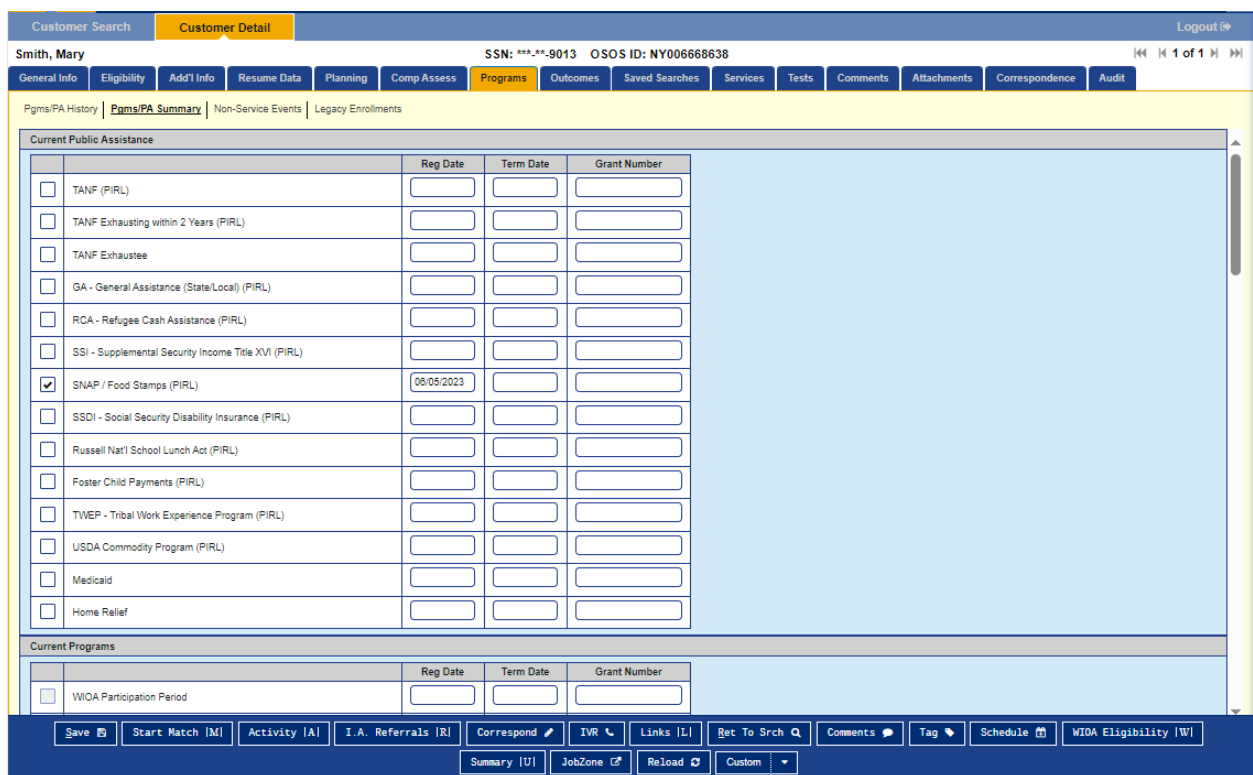
*Migrant/Seasonal Worker: Yes No
*Migrant Class: Migrant Farmworker
*Farmwork Type: Agricult. Production & Services
Empl. in Farmwork: [] Farmwork Threshold: []

CURRENT PUBLIC ASSISTANCE

Public Assistance data is entered in the **Customer Detail** window, **Programs** Tab, **PgmsPA Summary** link. To enter data, check the box of the type of public assistance the customer is receiving. Once the box is checked, the **Registration Date** field will open and allow for entry.

The **Registration Date** is the date the customer started to receive these benefits. Once opened, this is a required field, and the record will not save if the category box is selected without a date in this field.

The **Termination Date** is the date the customer stopped receiving the public assistance. If a customer is reenrolled in services and a record is on file without a Term Date, staff will need to add a Termination Date prior to entering new public assistance information. Staff should not try to delete the Registration Date if they are unsure of the Termination Date. Instead, ask the customer to provide their best approximation of the date when they stopped receiving the assistance and enter that information in the Termination Date data field.



	Reg Date	Term Date	Grant Number
<input type="checkbox"/> TANF (PIRL)			
<input type="checkbox"/> TANF Exhausting within 2 Years (PIRL)			
<input type="checkbox"/> TANF Exhaustee			
<input type="checkbox"/> GA - General Assistance (State/Local) (PIRL)			
<input type="checkbox"/> RCA - Refugee Cash Assistance (PIRL)			
<input type="checkbox"/> SSI - Supplemental Security Income Title XVI (PIRL)			
<input checked="" type="checkbox"/> SNAP / Food Stamps (PIRL)	08/05/2023		
<input type="checkbox"/> SSDI - Social Security Disability Insurance (PIRL)			
<input type="checkbox"/> Russell Nat'l School Lunch Act (PIRL)			
<input type="checkbox"/> Foster Child Payments (PIRL)			
<input type="checkbox"/> TWEPP - Tribal Work Experience Program (PIRL)			
<input type="checkbox"/> USDA Commodity Program (PIRL)			
<input type="checkbox"/> Medicaid			
<input type="checkbox"/> Home Relief			

	Reg Date	Term Date	Grant Number
<input type="checkbox"/> WIOA Participation Period			



If any public assistance information was recorded in error, such as the Registration Date, staff must contact the OSOS Help Desk for assistance with deleting the information.



COMPREHENSIVE ASSESSMENT WINDOW

There are six tabs in the Comprehensive Assessment window that are used for Adult and Dislocated Workers. When information is entered into the Comp Assess section, all required data fields (as indicated by a green dot) must be completed to save the record. These must be completed before any enrolling activities or services are recorded for the customer.

CUSTOMER		PROVIDER					
Customer Search		Customer Detail					
SMITH, MARY E.							
General Info	Eligibility	Add'l Info	Resume Data	Planning	Comp Assess	Programs	
Employment	Education	Financial	Family	Health	Treatments	Legal	Housing Transportation

EMPLOYMENT TAB

In the **Employment** tab, the **Origination Date** field will populate with the date of the first entry into any **Comprehensive Assessment** tab. Once staff make an update to any existing entries the Last Update field will populate. Gray data fields indicate that the data cannot be changed in that section.

The **Employment Objective** section will pre-populate with data from the **Objective** tab in the **Customer Detail** window. Modifications to this section would need to be made in the **Customer Detail** window.

Staff may complete the **Job Behavior and Skills** section with information obtained during the comprehensive assessment interview and may update information as changes occur. The **Job Behavior and Skills** section allows information regarding the customer's employment experience and job seeking and retention skills. Staff can use this section when developing an Individual Employment Plan (IEP) with the customer.

Customer Search | Customer Detail | Logout

Smith, Mary | SSN: ***-**-9013 | OSOS ID: NY00668638 | 1 of 1

General Info | Eligibility | Add'l Info | Resume Data | Planning | **Comp Assess** | Programs | Outcomes | Saved Searches | Services | Tests | Comments | Attachments | Correspondence | Audit

Employment | Education | Financial | Family | Health | Treatments | Legal | Housing | Transportation

Employment

Origination Date: 05/24/2024 | Last Update: 05/24/2024

Staff Assigned: Administrator, SelfService

Employment Objective: Nursing Assistants

Wage Desired: 250.00 | Per: Weekly

Geographical Location: Within 50 miles of 14469

Is the customer interested in non-traditional Employment? Yes No

Current Employment Status: Not Employed

Poor Work History?

Youth Needing Additional Assistance?

Serious Barriers to Employment?

Cultural Barriers to Employment?

Other Barriers to Employment?

Job Behavior and Skills - Employment Behavior: Maintains steady employment, states they have good references and good time and attendance record.

Job Seeking Skills: Mary is aware of traditional methods of finding employment and is looking for new job search ideas.

Job Keeping Skills: Good

Summary of Occupational Strengths and Weaknesses: Mary has the degree for their field but is lacking a certificate which is required in the local labor market.

[View Employment History](#)

Save | Start Match | Activity | I.A. Referrals | Correspond | IVR | Links | Ret To Srch | Comments | Tag | Schedule | WIOA Eligibility | Summary | JobZone | Reload | Custom

The **Cultural Barriers to Employment** field is a required field for reporting purposes. WIOA defines a cultural barrier as having attitudes, beliefs, customs, or practices that may make it hard for an individual to find work. If cultural barriers are identified, indicate this by selecting Yes in the in the Cultural Barriers drop down.

Lastly, indicate if the customer has any **Serious Barriers to Employment**. Explain in the Customer Detail Comments tab any work restrictions or how the barrier restricts the customer's job search.


Poor Work History?

Youth Needing Additional Assistance?

Serious Barriers to Employment?

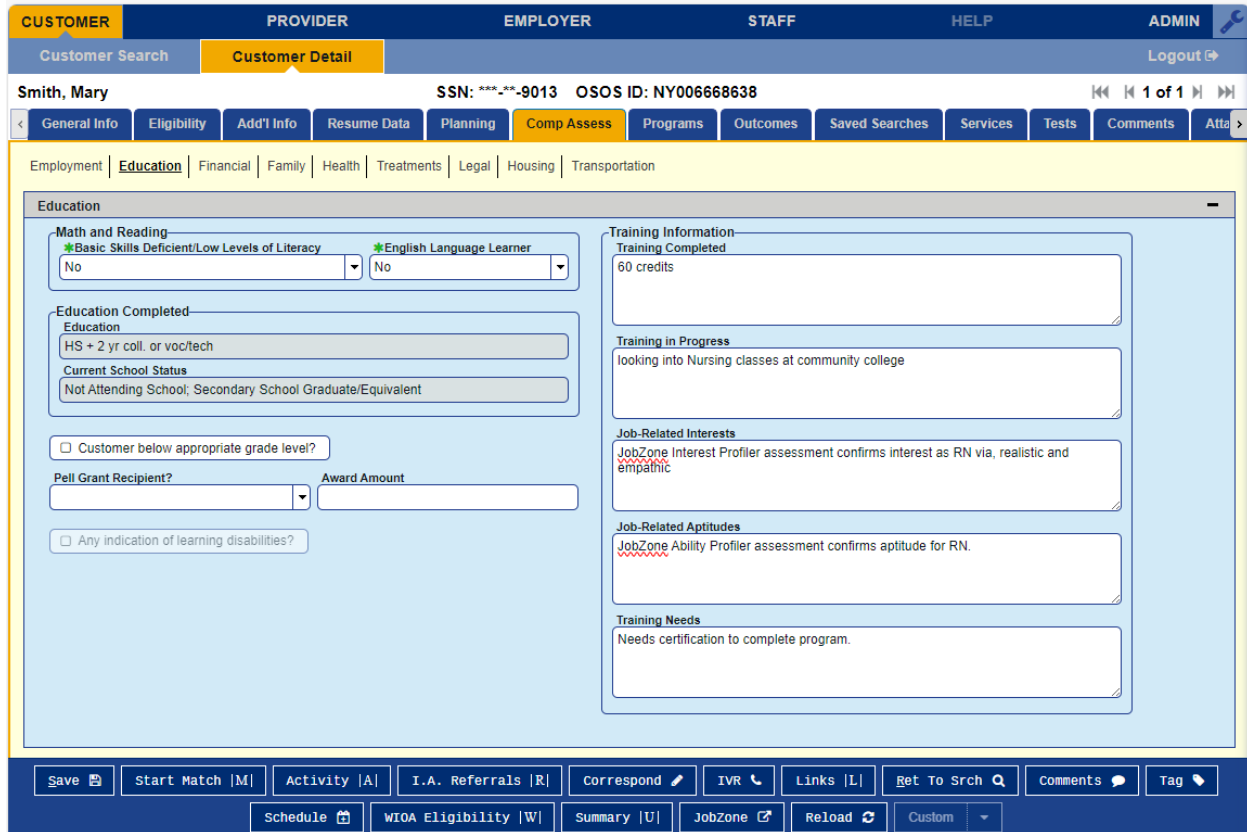
*Cultural Barriers to Employment?

Other Barriers to Employment?



EDUCATION TAB

The **Education** tab is used to capture the customer's past and current education/training, training needs, job interests, job aptitudes, skill deficiencies, and learning barriers.



The screenshot displays the OSOS interface for a customer named Mary Smith. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP, and ADMIN. The main navigation bar shows various tabs like General Info, Eligibility, Add'l Info, Resume Data, Planning, Comp Assess, Programs, Outcomes, Saved Searches, Services, Tests, Comments, and Attachments. The Education tab is selected, showing a form with the following sections:

- Math and Reading:** Includes a dropdown for "Basic Skills Deficient/Low Levels of Literacy" (set to "No") and a dropdown for "English Language Learner" (set to "No").
- Education Completed:** A text field containing "HS + 2 yr coll. or voc/tech".
- Current School Status:** A text field containing "Not Attending School; Secondary School Graduate/Equivalent".
- Pell Grant Recipient:** A dropdown menu and an "Award Amount" text field.
- Any indication of learning disabilities?:** A checkbox.
- Training Information:** A section titled "Training Completed" with a text area containing "60 credits".
- Training in Progress:** A text area containing "looking into Nursing classes at community college".
- Job-Related Interests:** A text area containing "JobZone Interest Profiler assessment confirms interest as RN via, realistic and empathic".
- Job-Related Aptitudes:** A text area containing "JobZone Ability Profiler assessment confirms aptitude for RN.".
- Training Needs:** A text area containing "Needs certification to complete program.".

The bottom of the interface features a toolbar with buttons for Save, Start Match, Activity, I.A. Referrals, Correspond, IVR, Links, Get To Srch, Comments, Tag, Schedule, WIOA Eligibility, Summary, Jobzone, Reload, and a Custom dropdown.

In the **Basic Skills Deficient/Low Levels of Literacy** field, choose an option from the drop-down list. WIOA defines Basic Skills Deficient/Low Levels of Literacy as unable to solve problems, or read, write, or speak English at a level necessary to function on the job, in your family, or in society.

The **English Language Learner** field is required for WIOA reporting. Choose "Yes" or "No" from the drop-down list. An English Language Learner will have limited ability in speaking, reading, writing, or understanding English. They may also meet one of the following two conditions:

- Their native language is other than English; or
- They live in a family or community where a language other than English is the main language



When speaking to the customer, you will most likely get a sense if the customer is an English Language Learner. For example, if they are having difficulty reading forms or articulating their answers, they may be an English Language Learner.

The **Education Completed** section will automatically populate from the **Customer Detail** window, **Comp Assess** tab, **Education** link. Modifications to this section would need to be made in the **Customer Detail** window.

If the customer disclosed a learning disability (as indicated in the **Disability Info** section of the **Eligibility** tab in the **Customer Detail** window), then the box next to the question **Any indication of learning disabilities** will be automatically checked.

Lastly, staff may fill in any Training Information in the five text boxes on the right, if applicable. As a best practice, when making changes to these fields, staff should enter a note in the **Comments** tab in the **Customer Detail** window to notify another staff person that may be working with the customer that something has changed.

The screenshot shows the OSOS Customer Detail window for a customer named Smith, Mary. The 'Education' tab is selected, and the 'Comp Assess' sub-tab is active. The 'Math and Reading' section shows 'Basic Skills Deficient/Low Levels of Literacy' set to 'No' and 'English Language Learner' set to 'No'. The 'Education Completed' section shows 'HS + 2 yr coll. or voc/tech' and 'Current School Status' as 'Not Attending School; Secondary School Graduate/Equivalent'. The 'Any indication of learning disabilities?' checkbox is checked, and a yellow arrow points to it. The 'Learning Disabilities' text box is empty. The 'Training Information' section on the right has five empty text boxes for 'Training Completed', 'Training in Progress', 'Job-Related Interests', 'Job-Related Aptitudes', and 'Training Needs'. The top navigation bar includes tabs for 'General Info', 'Eligibility', 'Add'l Info', 'Resume Data', 'Planning', 'Comp Assess', 'Programs', 'Outcomes', 'Saved Searches', 'Services', 'Tests', 'Comments', 'Attachments', 'Correspondence', and 'Audit'. The top status bar shows 'SSN: ***-**-9013' and 'OSOS ID: NY006668638'.

FAMILY TAB

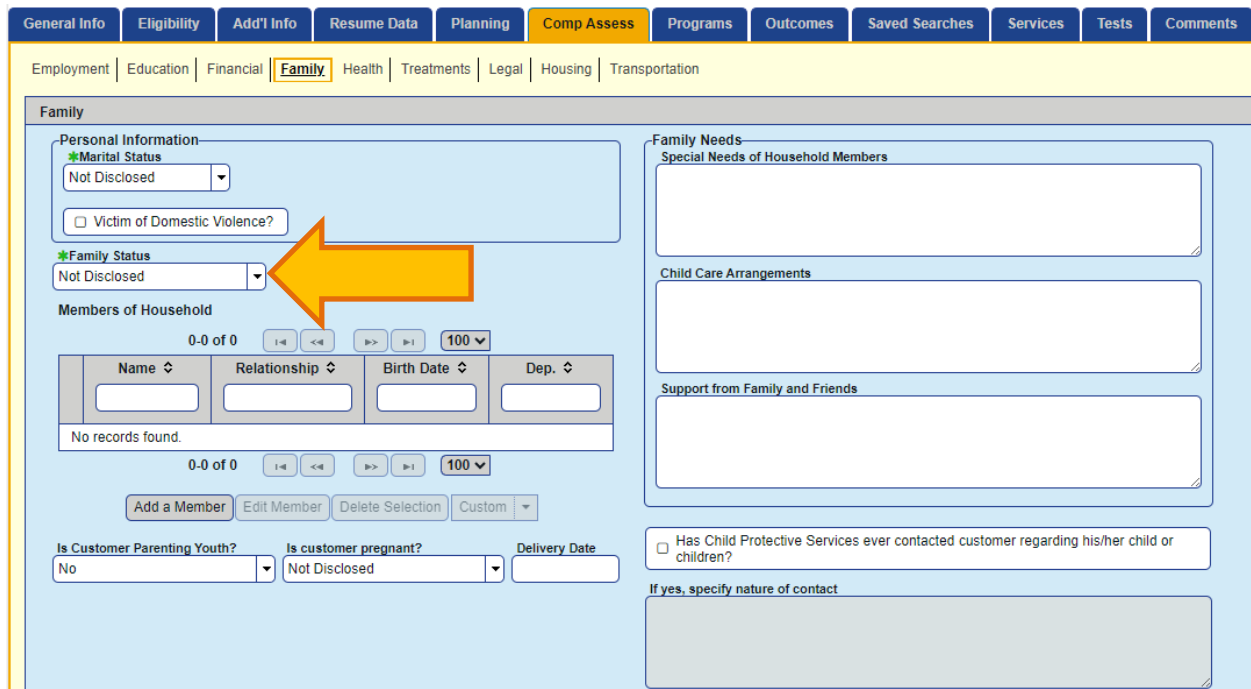
The Family tab contains the **Family Needs** section that can describe existing or needed supportive services such as special needs of household members, childcare arrangements, or support from family & friends that the customer receives or provides to another. As necessary, discuss these areas during a comprehensive assessment when setting goals and developing an IEP.



Personal Information should only be recorded if brought up or relevant to the service needs of the customer, such as the question, Victim of domestic violence?

Single Parent data is recorded in this tab as it relates to adult and dislocated workers. Choose an option from the drop-down list next to the Family Status data field. Additional data elements are recorded for the WIOA title I-B Adult and Dislocated Worker program participants that receive an intensive or training service.

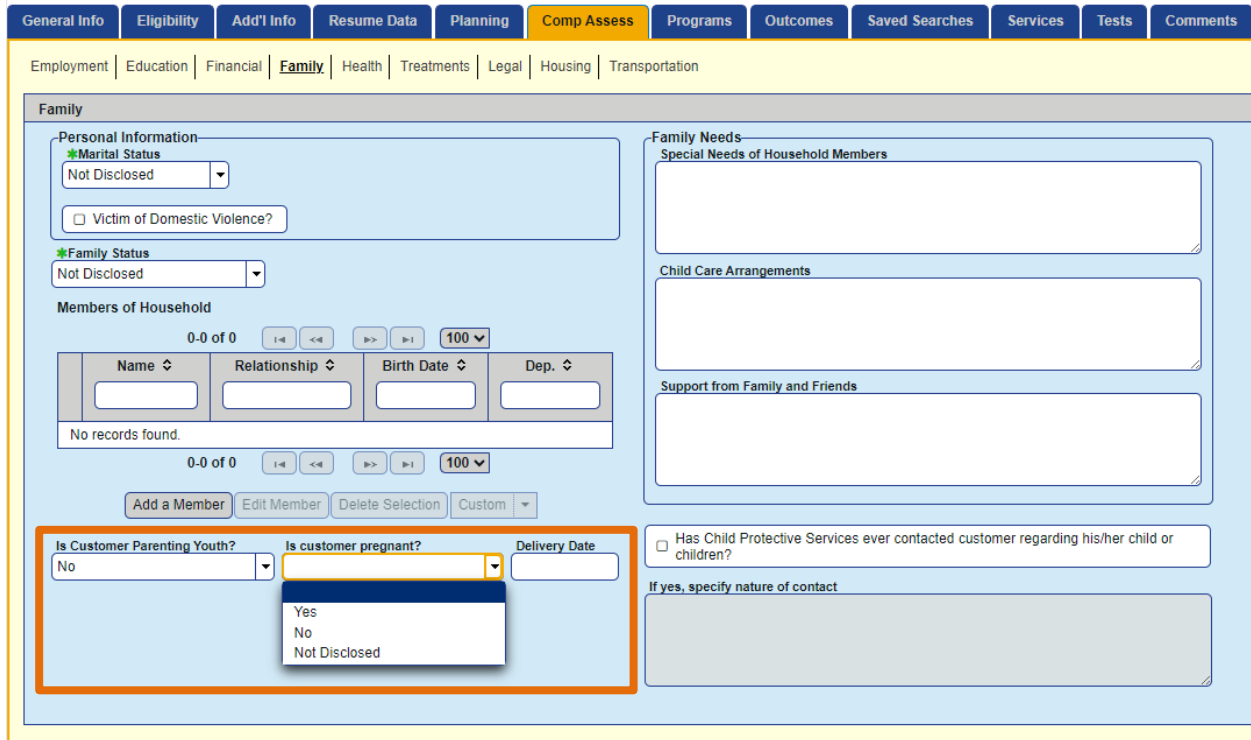
When customers choose not to answer a question on supplemental forms, record Not Disclosed in data fields.



The screenshot shows the OSOS Family tab interface. At the top, there are navigation tabs: General Info, Eligibility, Add'l Info, Resume Data, Planning, **Comp Assess**, Programs, Outcomes, Saved Searches, Services, Tests, and Comments. Below these are sub-tabs: Employment, Education, Financial, **Family**, Health, Treatments, Legal, Housing, and Transportation. The main content area is titled 'Family' and contains several sections:

- Personal Information:**
 - *Marital Status: Not Disclosed (dropdown)
 - Victim of Domestic Violence?
 - *Family Status: Not Disclosed (dropdown) - A yellow arrow points to this field.
- Members of Household:**
 - 0-0 of 0 (with pagination controls)
 - Table with columns: Name, Relationship, Birth Date, Dep.
 - No records found.
 - 0-0 of 0 (with pagination controls)
 - Buttons: Add a Member, Edit Member, Delete Selection, Custom
- Family Needs:**
 - Special Needs of Household Members (text area)
 - Child Care Arrangements (text area)
 - Support from Family and Friends (text area)
 - Has Child Protective Services ever contacted customer regarding his/her child or children?
 - If yes, specify nature of contact (text area)
- Parenting Information:**
 - Is Customer Parenting Youth?: No (dropdown)
 - Is customer pregnant?: Not Disclosed (dropdown)
 - Delivery Date: (text field)

For female customers, the screen will alter, and additional data fields will populate at the bottom of the tab.



While the data field Is customer pregnant? is a required field in OSOS, the Yes option is only needed for W-P, WIOA Adult or Dislocated Workers if it is relevant to service provision or developing an IEP.



Record Not Disclosed in the field Is customer pregnant? when not relevant to service provision.



LEGAL TAB

Offender status is collected for both WIOA compliance and to serve customers to the best of our ability. A prior conviction can be a barrier to securing employment and indicate a need to provide additional services. It is also important to record the status here so we can do a search in the system for customers that may need additional assistance. For example, the Work for Success program required NYSDOL to conduct a customer search and report the number of formerly incarcerated customers in the OSOS database. The only way to capture this data is via this tab.

The WIOA definition of offender states: An individual who has been subject to any stage of the criminal justice process, individuals who need help overcoming barriers to employment resulting from a record of arrest or conviction for crimes against persons or property, status offenses, or other crimes.

The **Legal** tab describes the customer's Offender Status as "Yes", "No", or "Not Disclosed".

The **Probation Officer contact** and **Current Legal Issues** data fields are not required. However, these fields can be helpful to staff working with another agency to assist the customer with securing employment.

Record relevant comments in the **Comments** tab in the **Customer Detail** window, such as when the conviction occurred, and whether the customer has work restrictions. Comments must be specific to job search restrictions and work restrictions only.

The screenshot shows the OSOS system interface with the 'Legal' tab selected. The 'Legal Information' section is active, and the 'Offender Status' dropdown menu is open, showing the options: Yes, No, and Not Disclosed. The 'Phone' and 'Ext' fields are also visible.



HOUSING TAB

The **Housing** tab describes the customer's residential situation. We are most concerned with Homeless status here for identifying service needs. Choose an appropriate option from the **Current Housing** drop-down menu that can be supported by appropriate documentation, such as mailing address or driver's license address. Update and add any additional information into the remaining data fields.

For veteran customers, the **Current Housing** will automatically populate with data from the Military Service section in the Additional Information tab in the Customer Detail window.

Under WIOA, homeless is defined as lacking a permanent and suitable nighttime residence. This includes:

- Sharing housing with other persons due to loss of housing, economic hardship, or similar reason;
- Living in a motel, hotel, trailer park, or campground due to a lack of other suitable options;
- Living in an emergency or temporary shelter;
- Abandoned in a hospital;
- Awaiting foster care placement; or
- Having a main nighttime residence that is a public or private place such as a car, park, abandoned building, bus or train station, airport, or campground

The screenshot shows the OSOS web interface with the 'Housing' tab selected. The navigation bar includes 'General Info', 'Eligibility', 'Add'l Info', 'Resume Data', 'Planning', 'Comp Assess', 'Programs', 'Outcomes', 'Saved Searches', 'Services', 'Tests', and 'Comments'. The 'Housing' sub-tab is active, showing a breadcrumb trail: 'Employment | Education | Financial | Family | Health | Treatments | Legal | Housing | Transportation'. The form contains the following fields:

- *Current Housing**: A dropdown menu with 'Rent' selected.
- Current Housing (2)**: A dropdown menu.
- Housing Assistance**: A dropdown menu with 'None' selected.
- Contact Person**: A text input field.
- Phone**: A text input field.
- Ext.**: A text input field.
- Expected Changes**: A text area containing the text: 'Customer is currently renting and has received a 30-day eviction notice.'



TRANSPORTATION TAB

The **Transportation** tab describes the customer's driver's license and available transportation. The License Information is populated from the **Ed/Lic** tab under the Customer Detail window.

It is important to record applicable **Transportation Information** to identify if the customer can access services and obtain employment. Check any boxes that apply and record relevant comments relating to work restrictions or job search restrictions in the **Comments** tab in the **Customer Detail** window.

The screenshot displays the OSOS interface with the 'Transportation' tab selected. The navigation bar includes: General Info, Eligibility, Add'l Info, Resume Data, Planning, Comp Assess (highlighted), Programs, Outcomes, Saved Searches, Services, Tests, and Comments. The breadcrumb trail shows: Employment | Education | Financial | Family | Health | Treatments | Legal | Housing | **Transportation**.

Transportation

License Information

Has License: Yes (dropdown) | Class: Class D (Operator) | State: New York

Endorsements

Passenger Transport | Hazardous Materials | Tank Vehicle | Motorcycle | School Bus | Doubles/Triples | Tank Hazard | Air Brakes

Tow Truck

Transportation Information

Does customer own a vehicle? | Vehicle License #: | Vehicle Type: (dropdown)

Does customer have auto insurance?

Transportation available to customer:

Own vehicle | Motorcycle | Bus/Rail | None | Other

Other Transportation

(Text input field)



ACTIVITIES AND COMMENTS

Once the Customer Detail and Comprehensive Assessment windows are fully updated, staff must record the appropriate activities and comments in the customer record.

INITIAL ASSESSMENT VERSUS COMPREHENSIVE ASSESSMENT

There are differences between conducting an initial assessment and comprehensive assessment, and in how each is recorded in OSOS.

The initial assessment is a basic service titled Assessment Interview, Initial Assessment in OSOS. It is the first review of a customer's present situation to determine the level and type of services he or she will require to return to meaningful work. It is an informal assessment that may be conducted with the aid of questionnaires and at a desk interview with staff.

Information on a job seeker's educational level, work history, employment barriers, employment goal and occupational knowledge, skill, and ability is collected and analyzed to determine the job seeker's likely employment opportunities in the local labor market (or in a labor market to which he/she is willing to relocate), which services are needed, whether referrals are appropriate, and for staff to create a next step service plan with the customer. Factors that may be taken into consideration include:

- Prevailing local labor market conditions, including the unemployment rate, local employer skill demands and hiring prerequisites.
- Transferable skills that the job seeker may possess that would be of interest to other local employers.

The L1 Assessment – Comprehensive and Specialized Skill Levels/Service Needs is an individualized service. It is used 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.

A comprehensive assessment involves quality time with a customer. In some instances, a comprehensive assessment may occur at the customer's first appointment, so the initial assessment rolls seamlessly into a comprehensive assessment. In other instances, staff may not have the scheduled time to complete a comprehensive assessment with the customer and a follow-up appointment will be made. The appointment could be with themselves or with a designated workforce professional in the Center. OSOS Guide - Comprehensive Assessment and Supplemental Data - 19 - 12/30/2022



To obtain additional information from a customer beyond a Career Center Customer Registration Form (Form ES100) and resume, staff should also provide customers with the Supplemental Questionnaire (Form ES102). Information from these documents, along with an interview will help staff assess barriers to employment, determine eligibility for priority of service, and to provide additional services. Providing additional information on the Supplemental Questionnaire by a customer is voluntary. However, we want to strongly encourage customers to provide information so we may appropriately serve them.



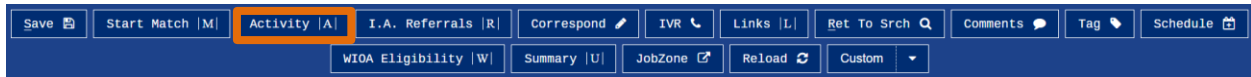
While many of the data elements captured will be entered in the Comprehensive Assessment window. Gathering this information only and recording into OSOS does not constitute a comprehensive assessment service in and of itself. The data collected however, will assist staff in developing a plan and providing a comprehensive assessment.

COMPREHENSIVE ASSESSMENT ACTIVITY

The comprehensive assessment is recorded in OSOS from the **Customer Detail** window:



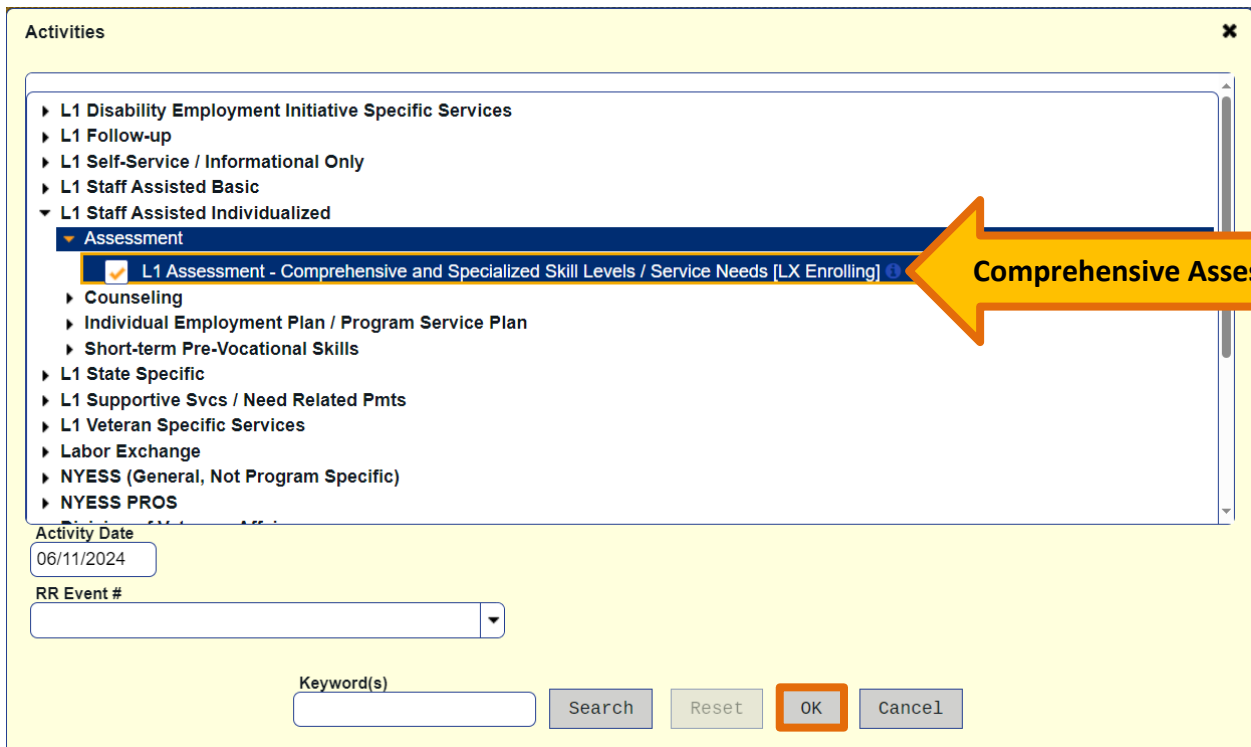
Click the **Activity** button at the bottom of the screen.



This will open the **Activities Webpage Dialog** box.

Select **L1 Assessment - Comprehensive Assessment and Specialized Skill Levels/Service Needs** activity and enter the date that the assessment was completed in the Activities--Webpage Dialog box. Enter the RR Event # if the comprehensive assessment was provided during, or in conjunction with, a Rapid Response Event.

Click the **OK** button.



Click the **Comments** button as described above and identify the assessment instrument used (interview, ability profiler) and a summary statement that details the delivery, outcome and interpretation.



RESOURCES AND ASSISTANCE

Additional OSOS guides and other resources can be found [here](#).

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

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

New York State Technical Advisories:

<https://dol.ny.gov/policy-directives>