Displaced Homemaker Program OSOS Guide

TABLE OF CONTENTS

PURPOSE

The New York State Displaced Homemaker Program (DHP), with contractors operating in multiple statewide locations, provides specialized services for those individuals who have been displaced from their careers as unpaid homemakers. For reference, a complete listing of NYS Displaced Homemaker Centers with contact information is included in the Resources section.

In New York State, DHP service providers have contracted with the New York State Department of Labor (NYSDOL) to enter customer information and services in OSOS.

CREATING AN OSOS ACCOUNT

Once a contract has been approved and executed, contractor staff will need to set up an OSOS account to enter the required information into OSOS.

Accounts are requested through the local security coordinator, or by sending an email to osos.wdtd@labor.ny.gov. For more information about setting up an OSOS account, contact the OSOS Accounts Unit or the guide: Accessing the System.

Access to OSOS is granted after:

- A signed Interagency Agreement (found at http://www.labor.ny.gov/workforcenypartners/ta/ta00-41att.html) is on file with NYSDOL.
- The OSOS user signs an Individual Access and Confidentiality Agreement that will be kept on file with NYSDOL or the local area security coordinator.
- The OSOS user competes OSOS confidentiality training.

Refer to the OSOS access information found in the user guide on page 4, and in the Internet Explorer browser information at http://www.workforcenewyork.org/osos/iebrowser.pdf, to ensure appropriate computer settings are used.

OSOS is accessed through the following URL: https://osos.labor.ny.gov. The login screen will appear after the system has downloaded the necessary files.

Guidance on accessing OSOS and creating customer records in OSOS is provided separately on the Department of Labor's website.

This guide will cover:

- Ensuring that required fields for DHP have been entered
- Entering DHP services

OSOS DATA ENTRY

SYSTEM REQUIREMENTS

OSOS has minimum system requirements to run properly. These system requirements are described in the OSOS website.

The OSOS website address DHP providers should use is: https://osos.labor.ny.gov.

The first time a user logs in to the URL, the validation page will appear.

Take a moment to check that the computer meets the minimum system requirements and follow any necessary additional steps required.

Notice that in order for OSOS to run properly, the computer must have Microsoft Windows 98 or newer and Internet Explorer 7, Internet Explorer 8 or Internet Explorer 9 running in compatibility mode.

Click the *Click for the AOSOS Mediated Application* to load the login screen. Please be patient since it may take a few minutes to finish loading.

LOGGING INTO OSOS

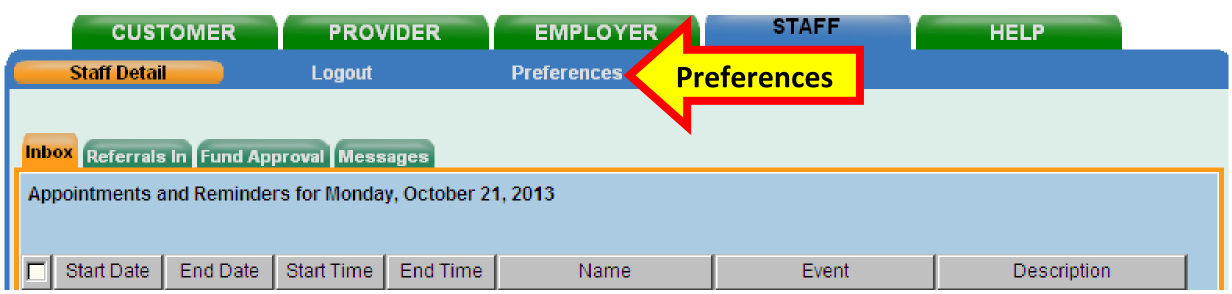
Create a shortcut to save the full URL. The new shortcut will navigate directly to the Login screen rather than the validation site. Enter the assigned username and temporary password in the **Username** and **Password** fields. Then click the **Login** button below to log into OSOS.

The OSOS username and password are case-sensitive and must be entered exactly as provided by WIA Central Security. After entering the username and password, click the Login button, or, tab and press the Enter key to log into the system.

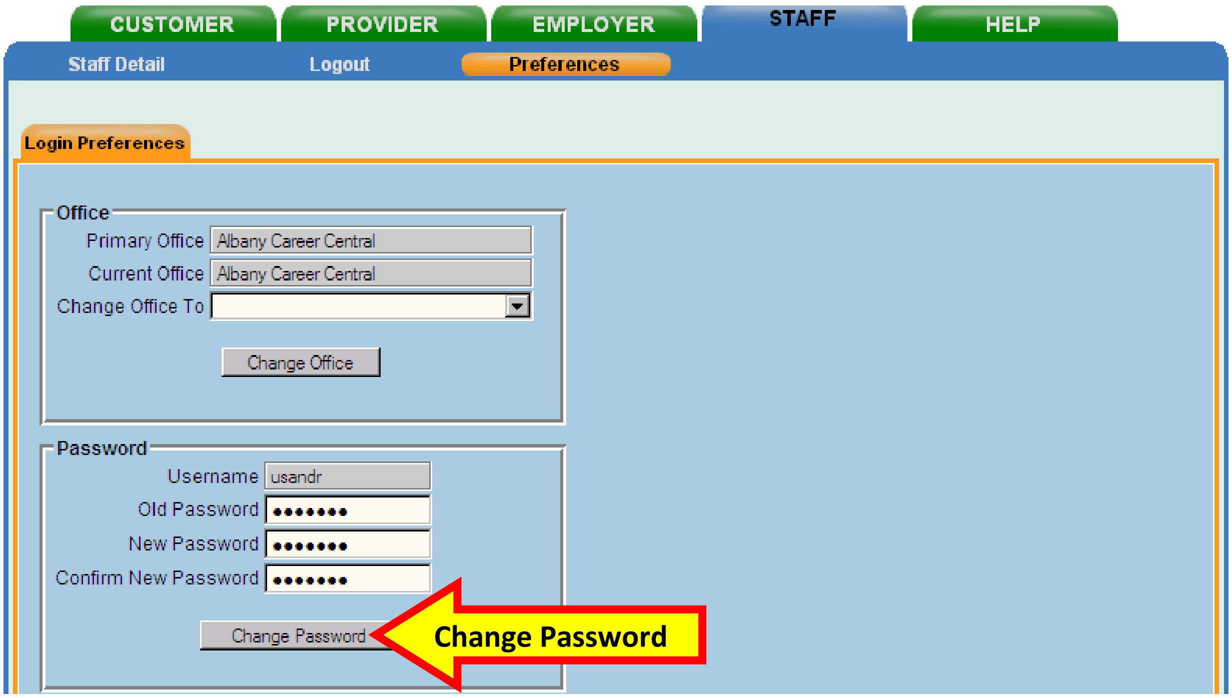
CHANGE THE TEMPORARY PASSWORD

After logging into OSOS for the first time with your temporary password, change the password to one that no one else will know.

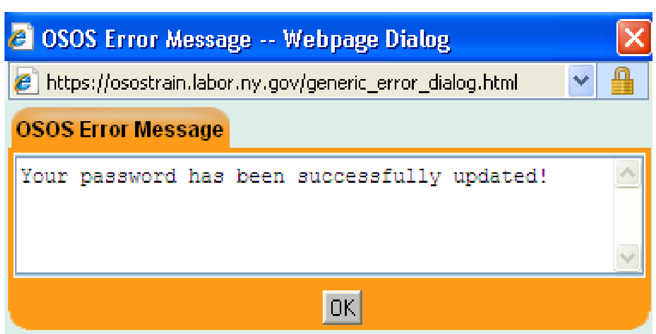
When logged into OSOS, the system will automatically navigate to the **Inbox** tab of the **Staff** module. Click the **Preferences** window.



Type the temporary password in the **Old Password** field and enter the new password in the **New Password** field. The new password can be between 6 – 12 characters, and only letters and numbers can be used. Any symbols, spaces and punctuation will not be accepted in the OSOS password. Type the new password again in the **Confirm New Password** field. Click the **Change Password** button to complete the change.



If the passwords entered in the **New Password** and **Confirm New Password** fields do not match; the new password does not meet the OSOS password criteria; or the old password was entered incorrectly in the **Old Password** field, an error message which will prompt a repeat of the process. If the password was successfully changed, a pop-up message will confirm the password was changed.



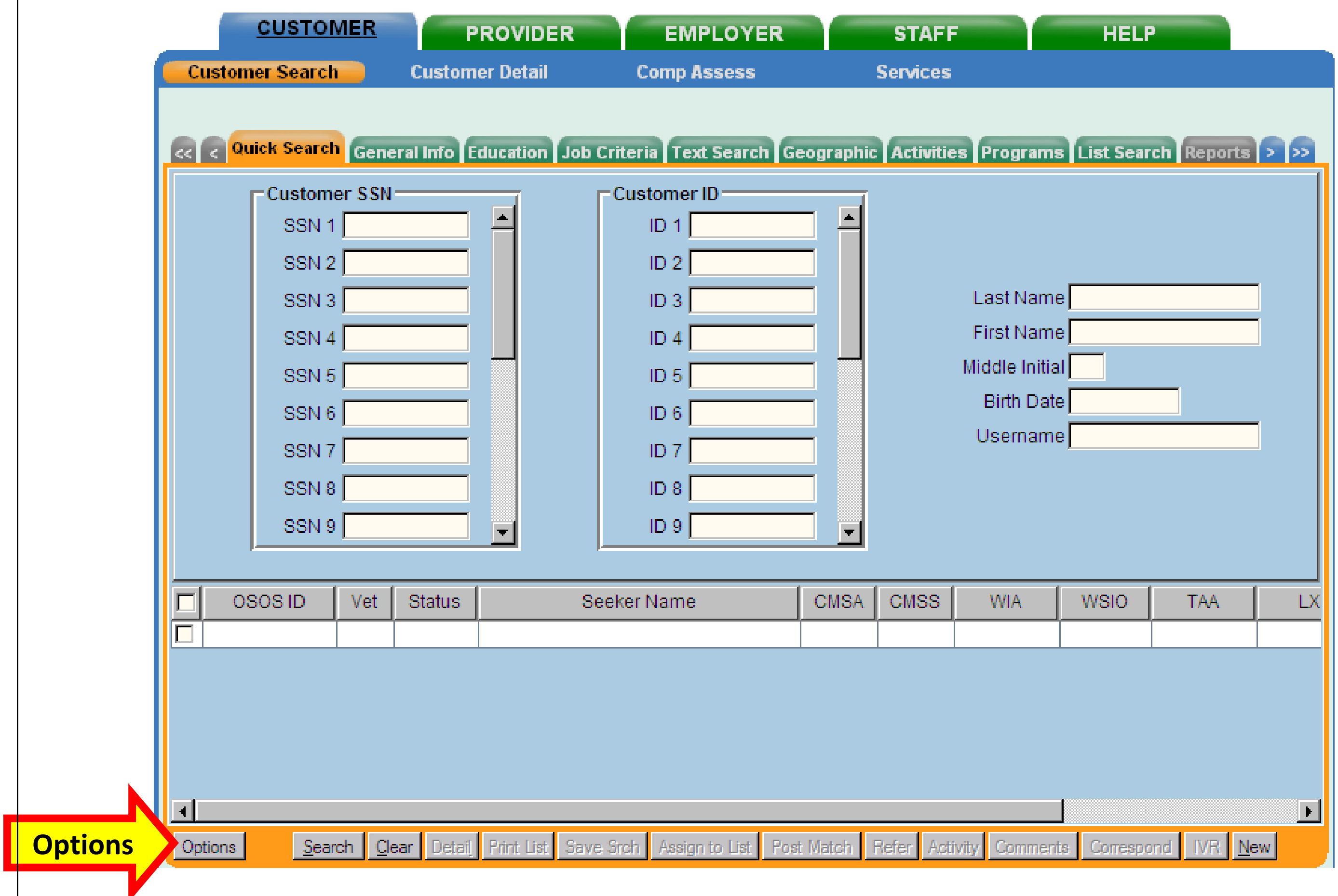
It is strongly recommend that the password be changed every few months to maintain confidentiality.

SEARCHING FOR DHP CUSTOMERS

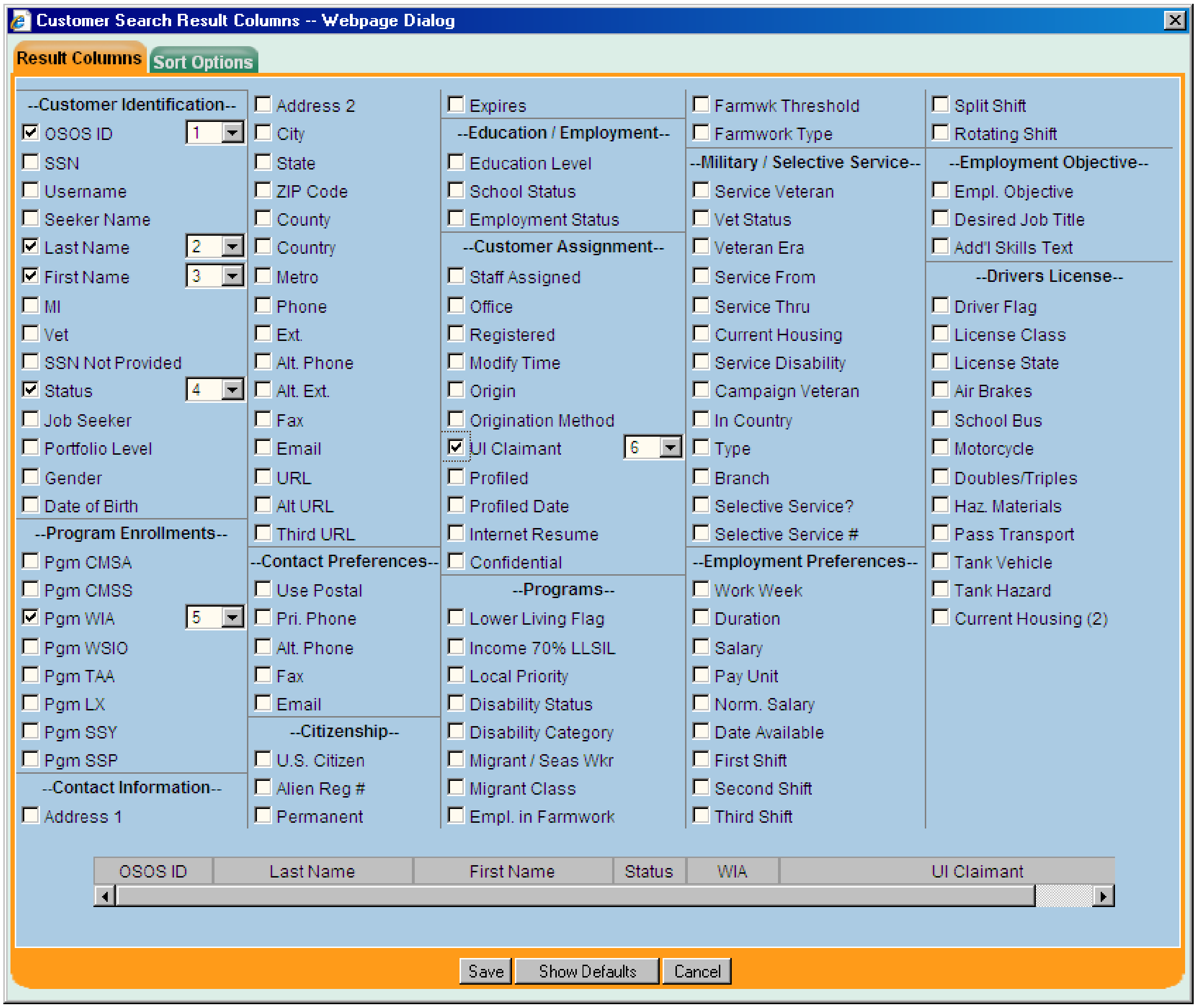
After logging in, navigate to the **Customer** module. By default, the **Quick Search** tab of the **Customer Search** window displays. Use this tab to search for customers by Social Security number (**Customer SSN**), OSOS Identification Number (**Customer ID** that begins with "NY0"), or by name (**Last Name** and **First Name**).

If searching by name, at least one letter must be entered in the **Last Name** field. Be sure to enter as much of the customer's first and last name as is known.

It is possible to specify what information is desired in the search results by clicking the **Options** button.

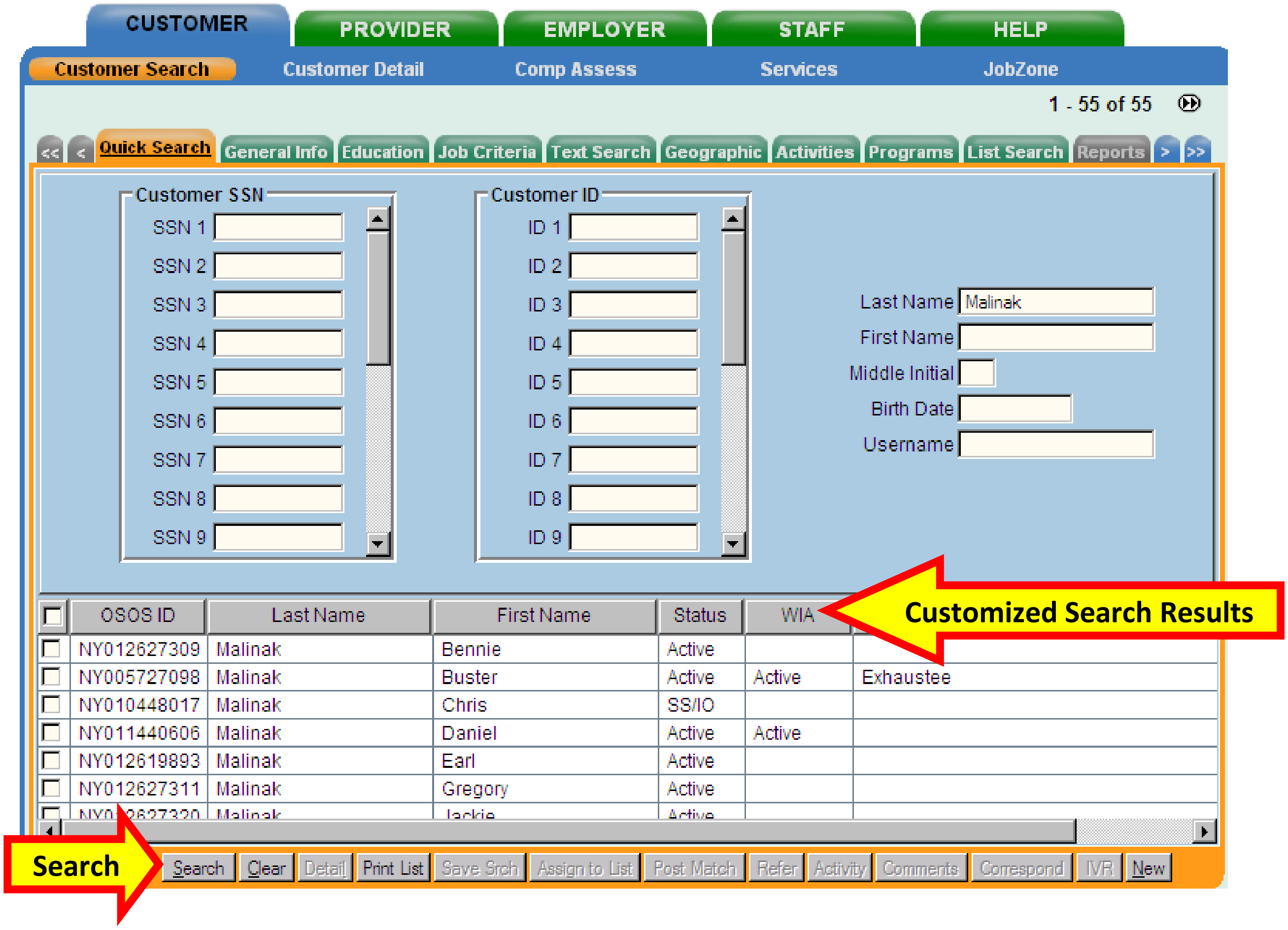


The Options button will allow the user to select what categories and in which order to display in the search results.

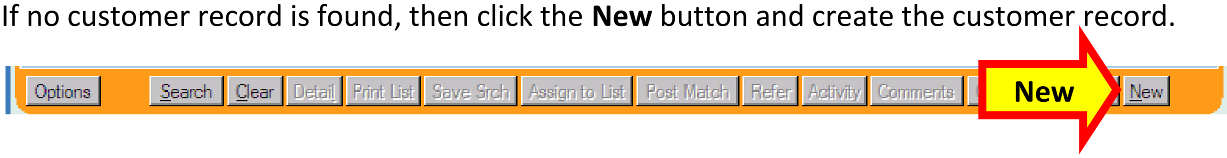


Click **Save** when done.

Click the **Search** button.

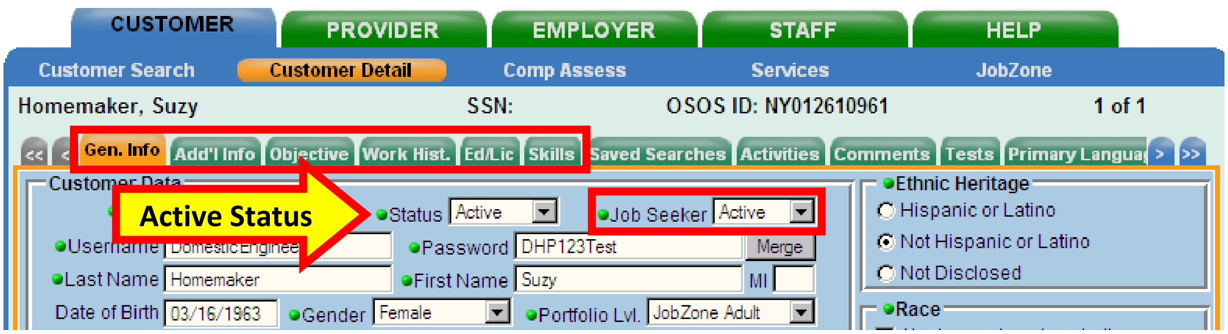


If no customer record is found, then click the **New** button and create the customer record.



REQUIRED/GREEN-DOTTED FIELDS

When entering new customer or completing a pending record in OSOS, all green-dotted fields are required. Green dotted fields exist in the **Gen. Info**, **Add'l Info**, **Objective**, **Work Hist.**, **Ed/Lic** and **Skills** tabs within the **Customer Detail** window. The customer record must be saved with the **Status** field set to *Active* before services can be added on the record. The Service Veteran fields are only required if applicable to the customer.



*The **Date of Birth** and **Gender** fields are not green-dotted, but are required to access the Comprehensive Assessment window, determine when selective service registration is required, and when the customer receives services. Do not change the **Porfolio Lvl** field.*

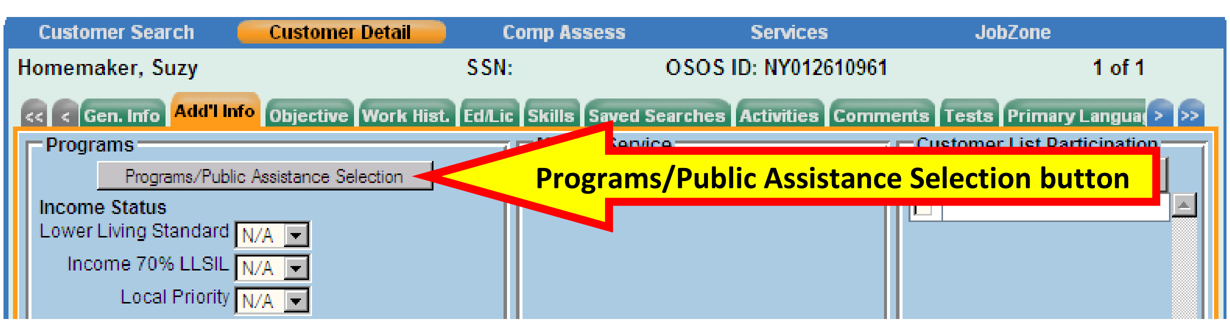
In addition to the required green-dotted fields, there are additional fields and tabs that need to be completed and/or checked for the Displaced Homemaker Program.

PROGRAMS AND PUBLIC ASSISTANCE

For DHP eligibility, it is required to track:

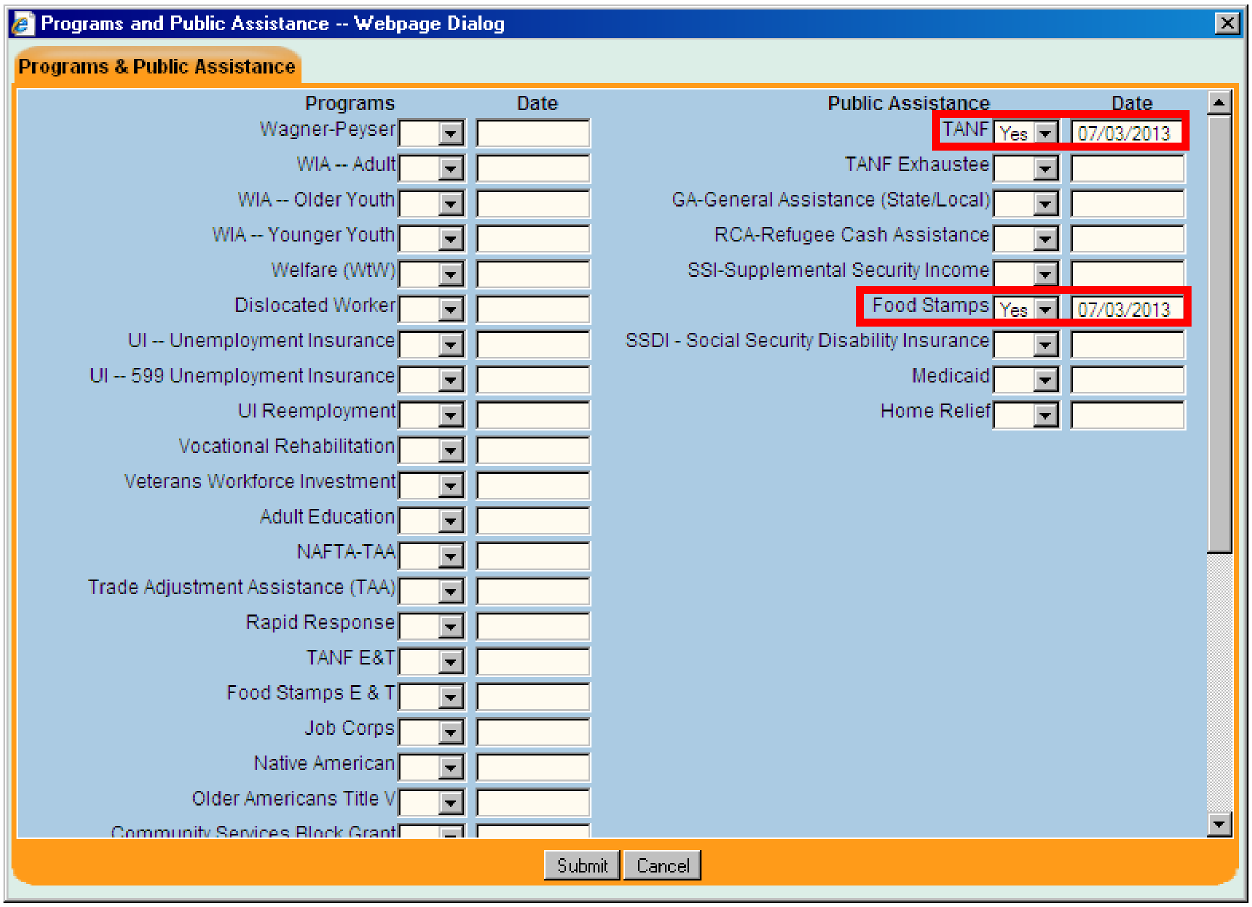
- The customer's status as a displaced homemaker
- Any public assistance benefits the customer is receiving, such as TANF or food stamps

In OSOS, this information should be recorded in the **Programs/Public Assistance** Webpage Dialog. Click the **Programs/Public Assistance Selection** button in the **Add'l Info** tab.

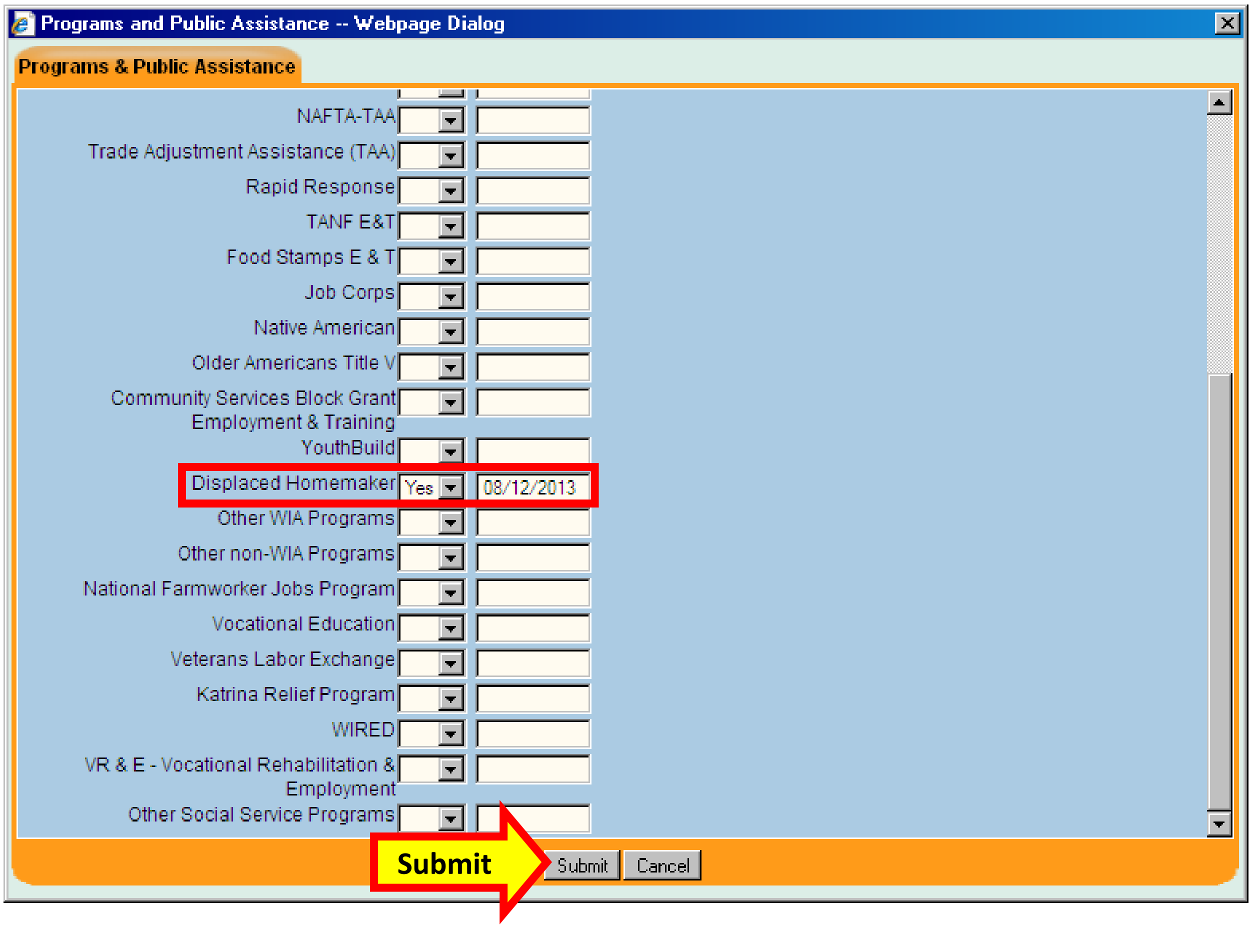


This will bring up the **Programs/Public Assistance - - Webpage Dialog**.

On the right hand side of the tab under **Public Assistance**, select *Yes* from the drop-down field next to any benefits the customer is receiving, and type the date the customer first started receiving these benefits. If the date is unknown, it is acceptable to type in today's date.



Scrolling further down under the **Programs** fields on the left hand side of the tab, select *Yes* from the drop-down field next to **Displaced Homemaker** and enter the date the customer first started receiving services as a displaced homemaker.



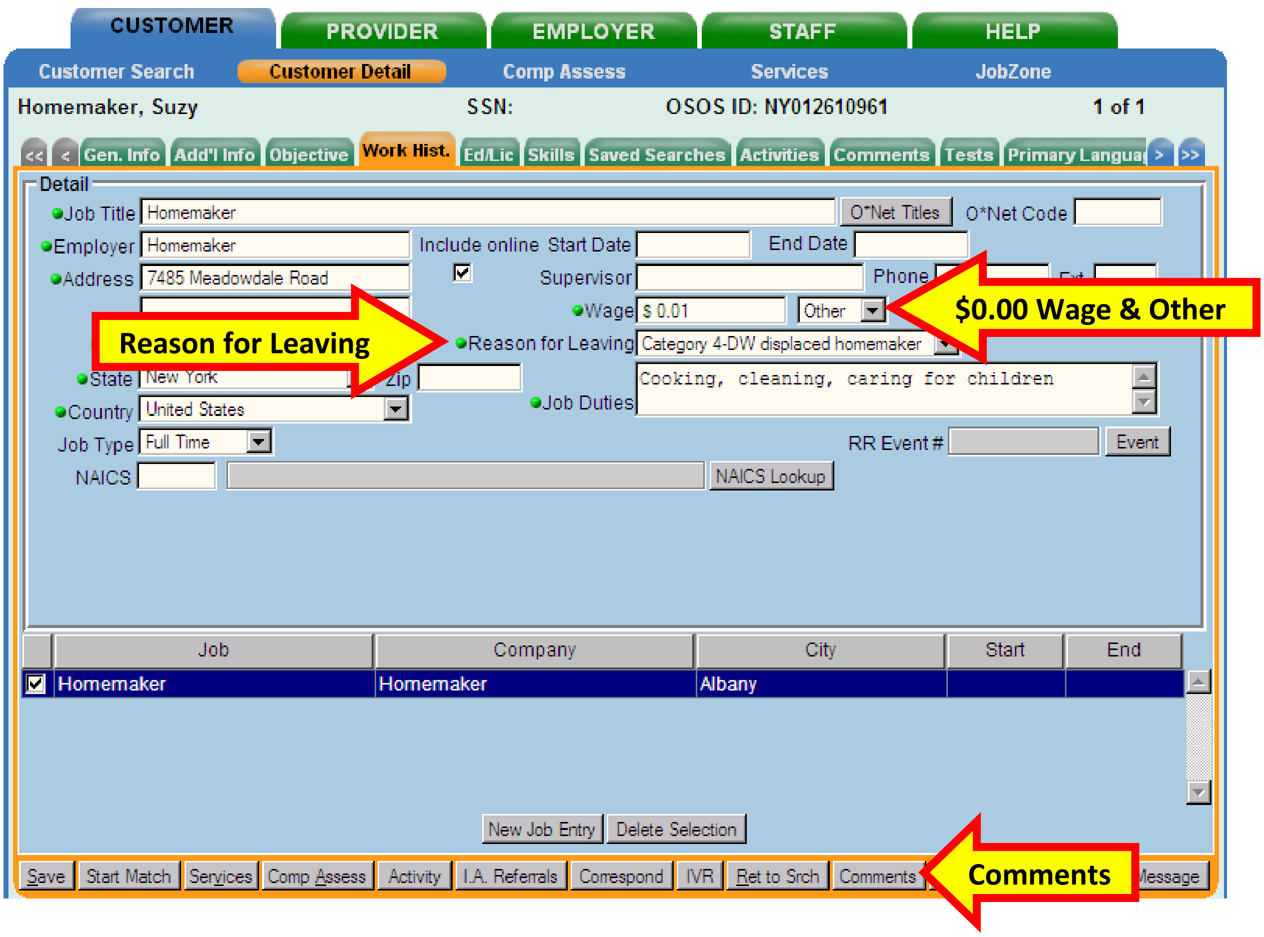
When finished entering this information, click **Submit** to add these changes to the record.

WORK HISTORY TAB

While working with DHP customer, be sure to confirm that the customer's work history in OSOS is accurate and up-to-date. Make any changes or updates as necessary.

For eligible displaced homemakers, the **Reason for Leaving** field on the applicable job entry must be set as **Category 4-DW displaced homemaker**.

If the customer has no work history, or the most recent job was as a homemaker, create a new job entry with the job title Homemaker *and select the* **Category 4-DW displaced homemaker** from the drop-down menu in the ***Reason for Leaving*** field. ***Wage*** *is a required field. Because* homemaker *is typically an unpaid position, enter $0.01 in the* ***Wage*** *field and* **Other** *in the* ***Unit*** *drop-down field is acceptable.*



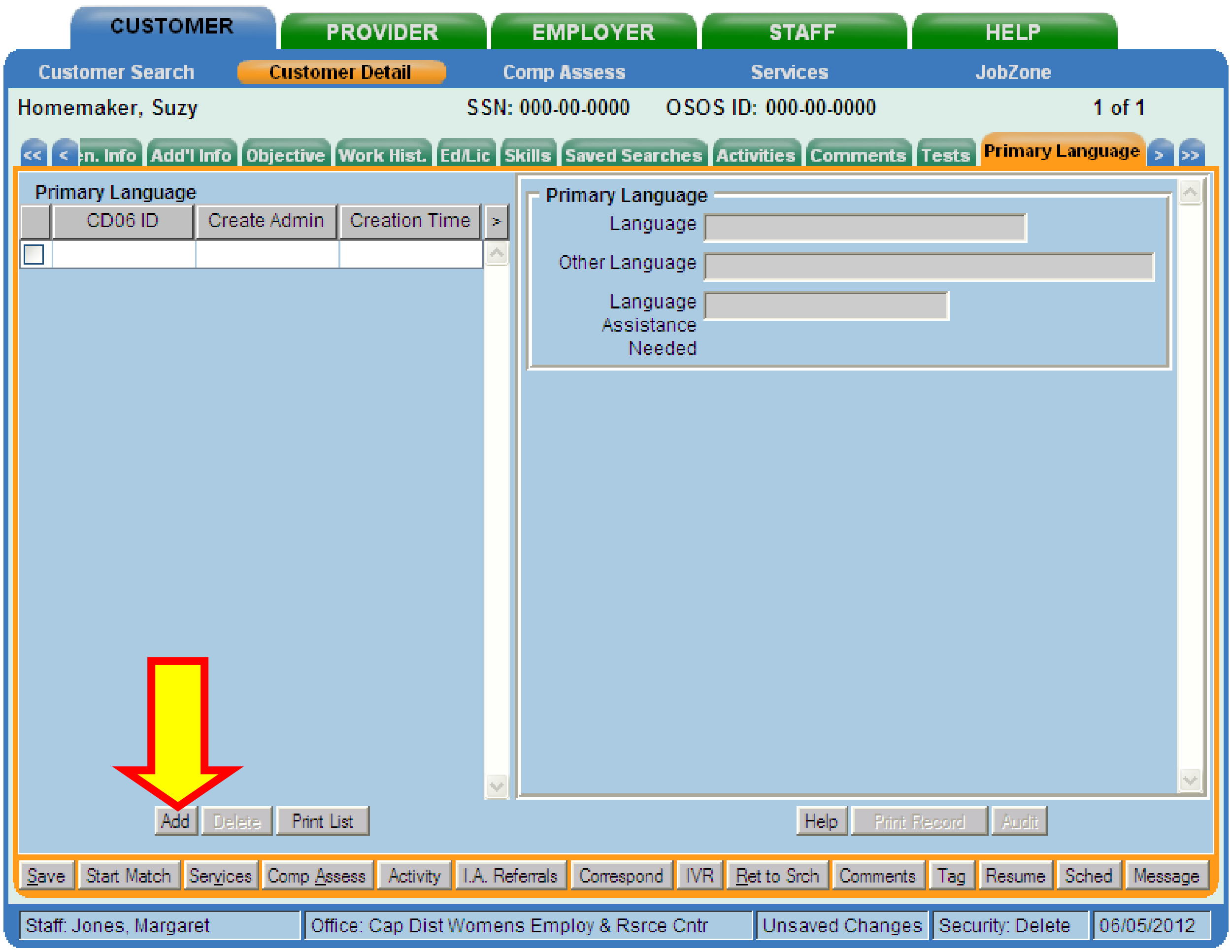
Once the customer is designated as a *Category 4-DW Displaced Homemaker*, click the **Comments** button to enter a comment describing the customer's eligibility criteria and verification as a displaced homemaker.

PRIMARY LANGUAGE TAB

In order for all DHP customers to be able to access program services, it is important to record on the **Primary Language** tab if the customer has a primary language other than English, and if the customer will require translation services to receive services. This information should be self-reported by the customer, usually during an initial assessment.

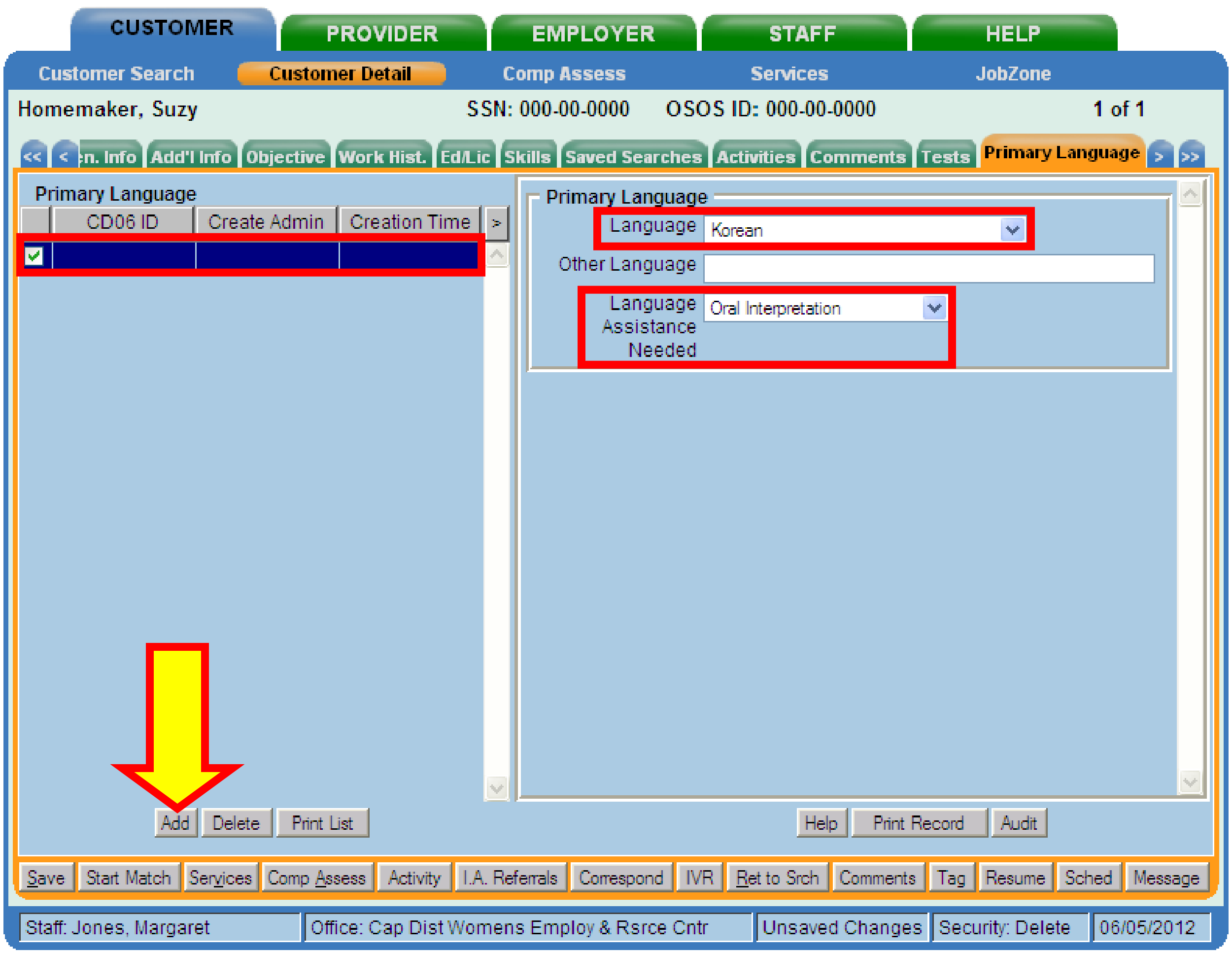
Additional guidance regarding completing the **Primary Language** tab is also available in the Language Services OSOS Guide available on the OSOS website.

To record a customer's primary language other than English on the **Primary Language** tab, click the **Add** button.



This will create a new entry and activate the fields on the right hand side of the tab for data entry.

- **Language**: Select the customer's primary language from the drop-down list
- **Other Language**: Only use if the customer's primary language is not listed in the **Language** drop-down menu
- **Language Assistance Needed**: Select what type of language assistance, if any, the customer needs - the options are: *No Assistance Needed*, *Oral Interpretation*, *Sign Language* and *Written Translation*



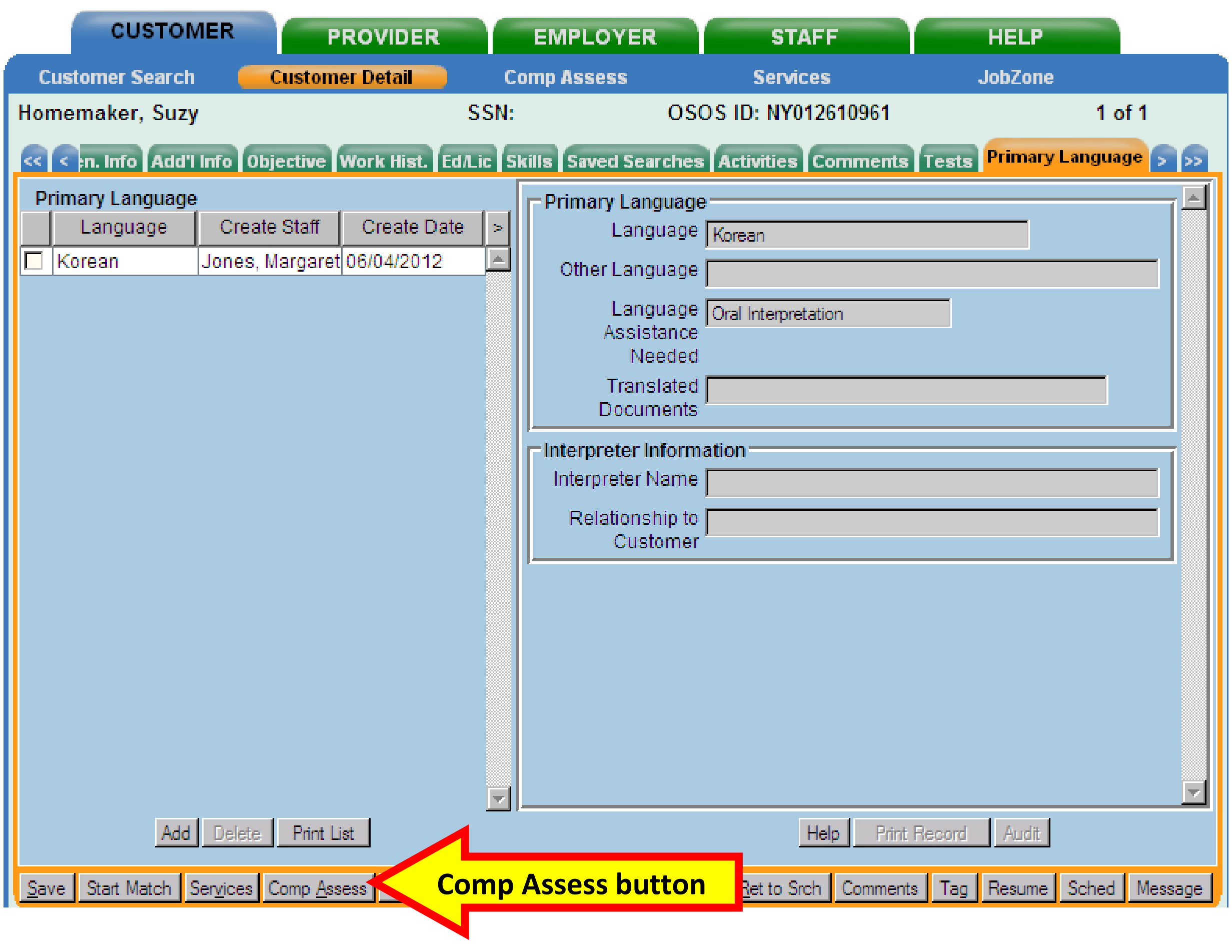
When finished entering this information, click **Save**.

COMPREHENSIVE ASSESSMENT WINDOW

There are a few fields in the **Comprehensive Assessment** window which should be recorded for DHP. Since the **Comprehensive Assessment** window is mainly used by NYSDOL for case management purposes, please enter only the fields indicated in this section of the guide. Any notes and comments entered in the **Comprehensive Assessment** window must be factual, must respect the privacy of the individual and are subject to customer review under the Freedom of Information Law (FOIL).

Any highly sensitive data of a confidential nature should not be entered into OSOS. To flag something applicable to the customer's ability to acquire and retain a job, enter ***See hard file*** *in the pertinent field in* ***Comprehensive Assessment****. This is an indicator for all users that there is something that might need to be discussed privately with other counselors or users, on an as-needed basis.*

To access the **Comprehensive Assessment** window, click on the **Comp Assess** button at the bottom of any screen in the **Customer Detail** window.

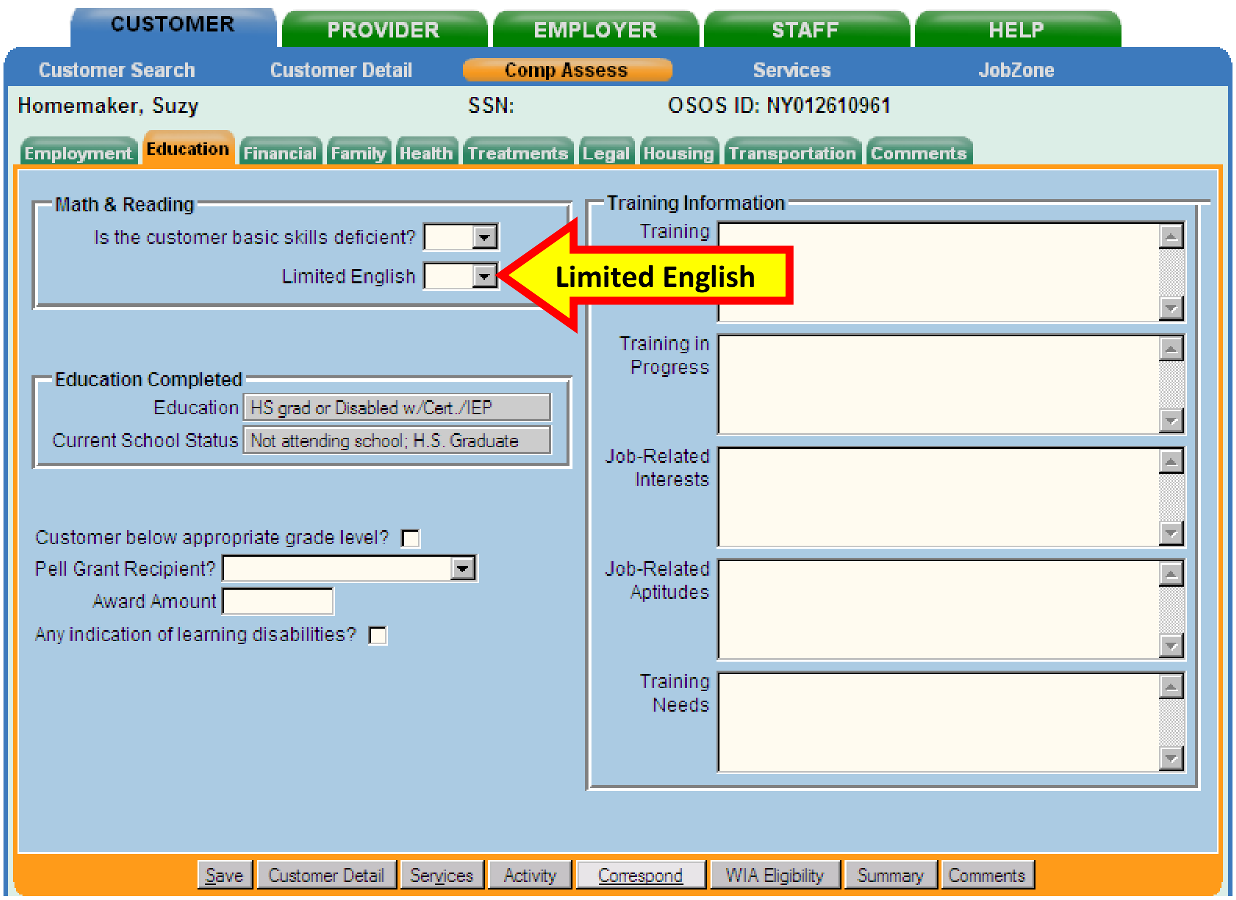


By default, the **Employment** tab in the **Comp Assess** window will be displayed. Enter any relevant information for the customer.

Education Tab - Limited English Field

On the **Education** tab under **Math & Reading**, select *Yes* or *No* for the **Limited English** field to indicate whether or not the customer has limited English proficiency. The **Limited English** field is a required field for any DHP participating in the SNAP program. It is not required for the DHP-TANF or DHP Statewide program.

*If Yes is selected in the **Limited English** field, the **Primary Language** tab in the **Customer Detail** window should be also be completed as outlined in the previous section of this guide.*



FAMILY TAB

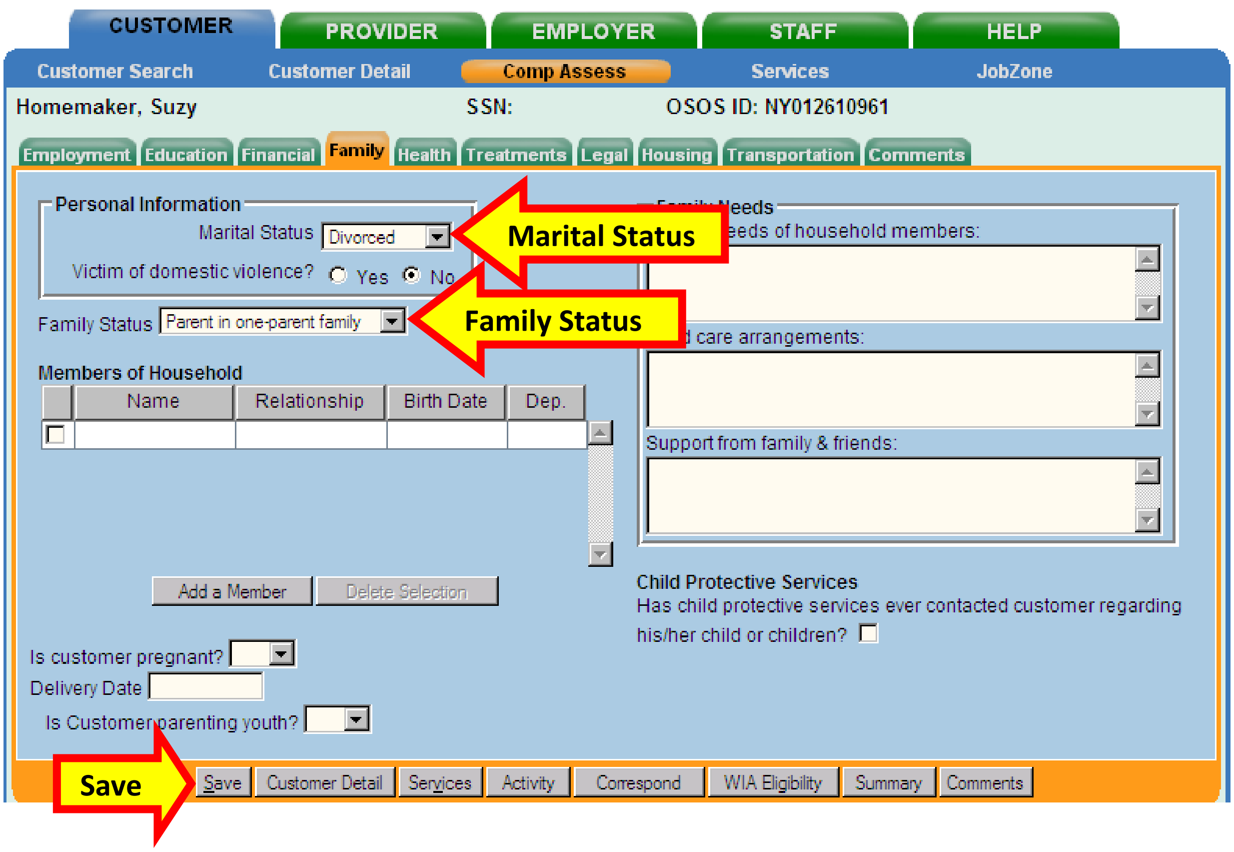
Information entered on the **Family** tab in the **Comp Assess** window can be useful in determining a customer's eligibility for DHP and the Family and Marital Status is a required field for any participant in the SNAP program, and would be helpful for DHP eligibility. The number in the family is required for TANF eligibility.

Under **Personal Information**, from the **Marital Status** drop-down menu, select either:

- *Divorced*,
- *Married* or
- *Unmarried*

From the **Family Status** drop-down menu, select either:

- *Not a family member*,
- *Not reported*,
- *Other family member*,
- *Parent in one parent family* or
- *Parent in two parent family*.



Complete any other relevant data fields. When finished entering information in the **Comp Assess** window, click **Save**.

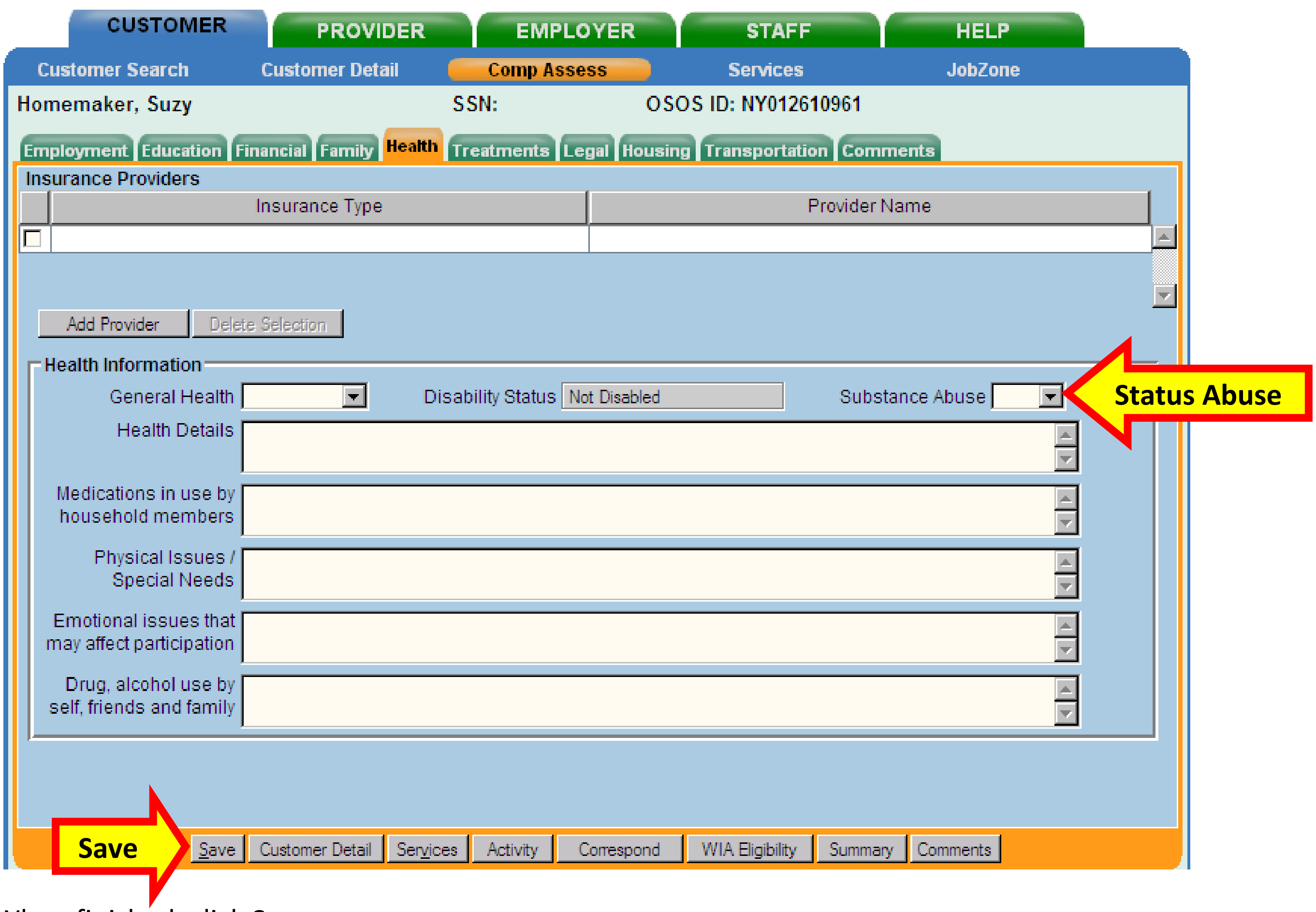
HEALTH TAB

Substance abuse Information entered on the **Health** tab in the **Comp Assess** window is a required field for any DHP participating in the SNAP program.

Under the **Substance Abuse** drop-down menu, select either:

- *Yes*, or
- *No*

It is not necessary to complete any of the other fields. If you choose to enter additional information, list only facts, and not opinions, as those details relate to the customer's program. When unsure if the confidentiality of the information may be sufficiently protected, do not enter it into the text box. Instead note "See hard copy in file" and keep the file in a locked drawer.



When finished, click **Save**.

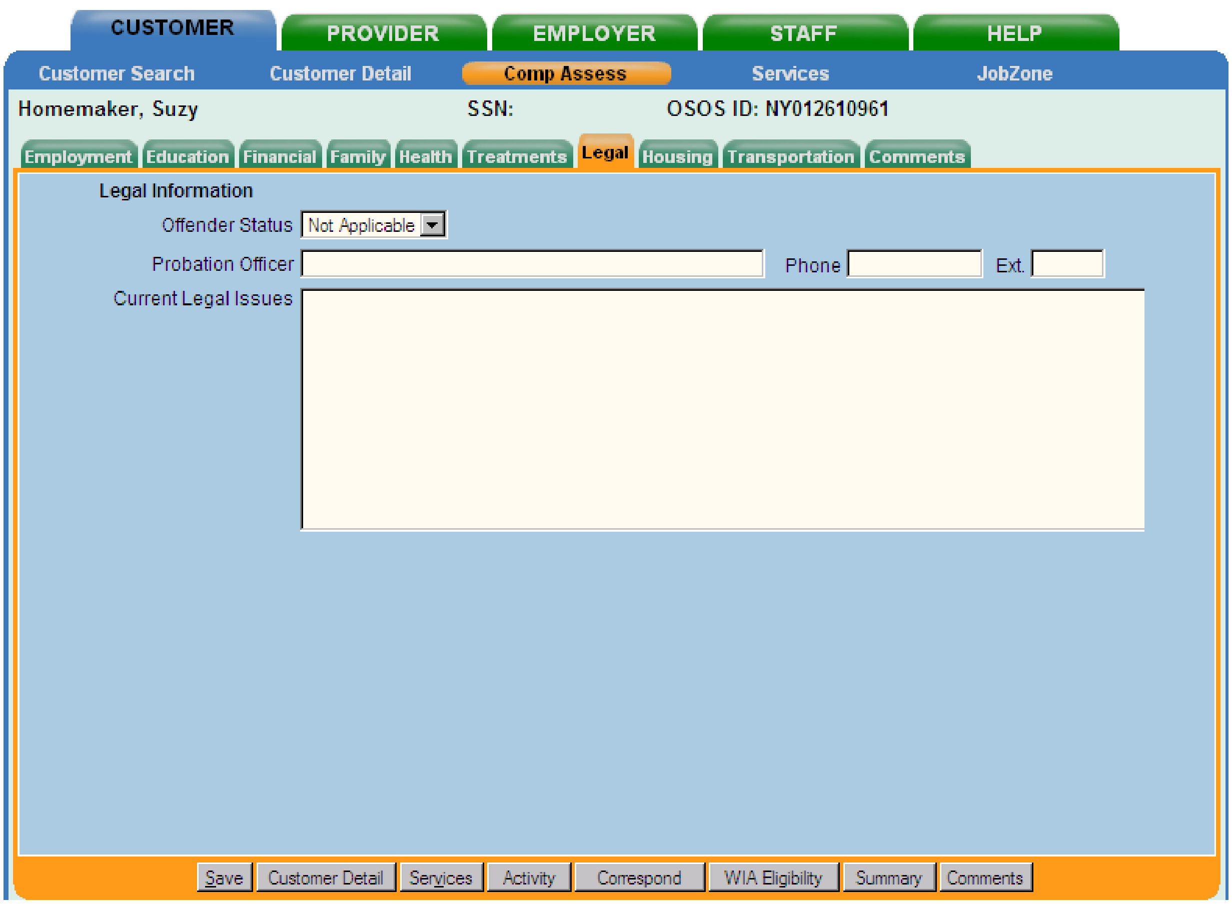
LEGAL TAB

Information entered on the **Legal** tab in the **Comp Assess** window is a required field for any DHP participating in the SNAP program.

Under **Offender Status** drop-down menu, select either:

- *Yes*, or
- *Not Applicable*

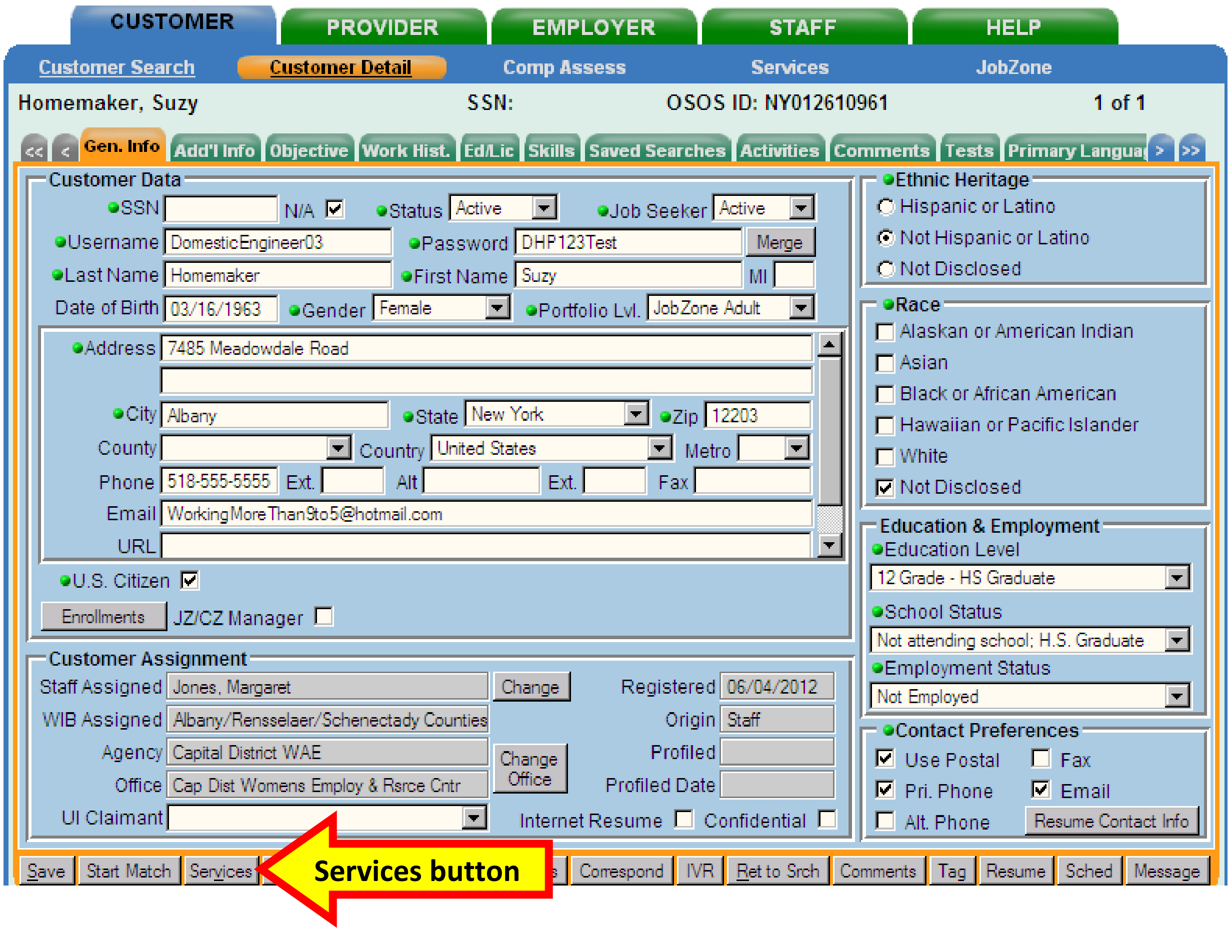
If a probation officer has been assigned to the customer, enter the name, telephone number and any extension in the appropriate data field. List only facts, and not opinions, as those details relate to the customer's program in the Current Legal Issues text box. When unsure if the confidentiality of the information may be sufficiently protected, do not enter it into the text box. Instead note "See hard copy in file" and keep the file in a locked drawer.



OSOS One-Stop Operating System

ENTERING DHP SERVICES

Click the **Services** button.



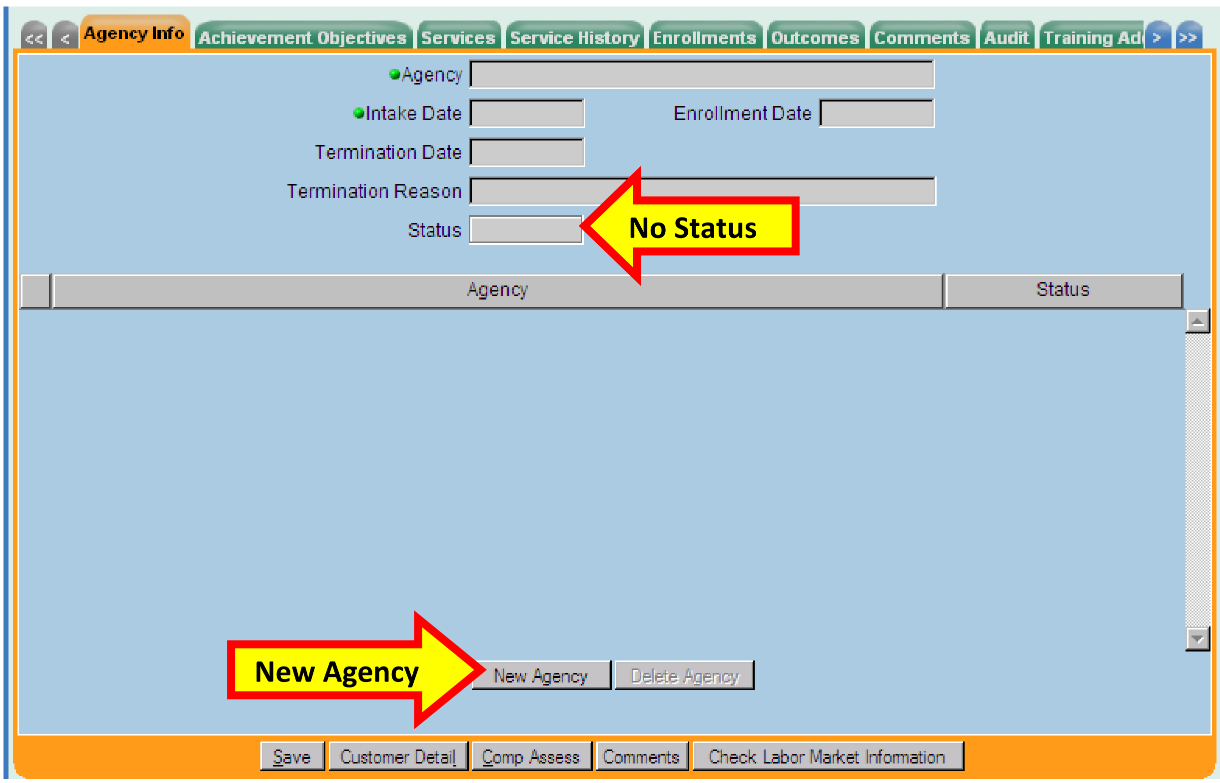
OSOS will navigate to the **Agency Info** tab in the **Services** window. The Agency will need to added or activated if it is not already active before entering a customer service.

Agency Info Tab

On the **Agency Info** tab, you will need to make sure that the appropriate Workforce Area Entity (WAE) is listed as an active agency before adding services.

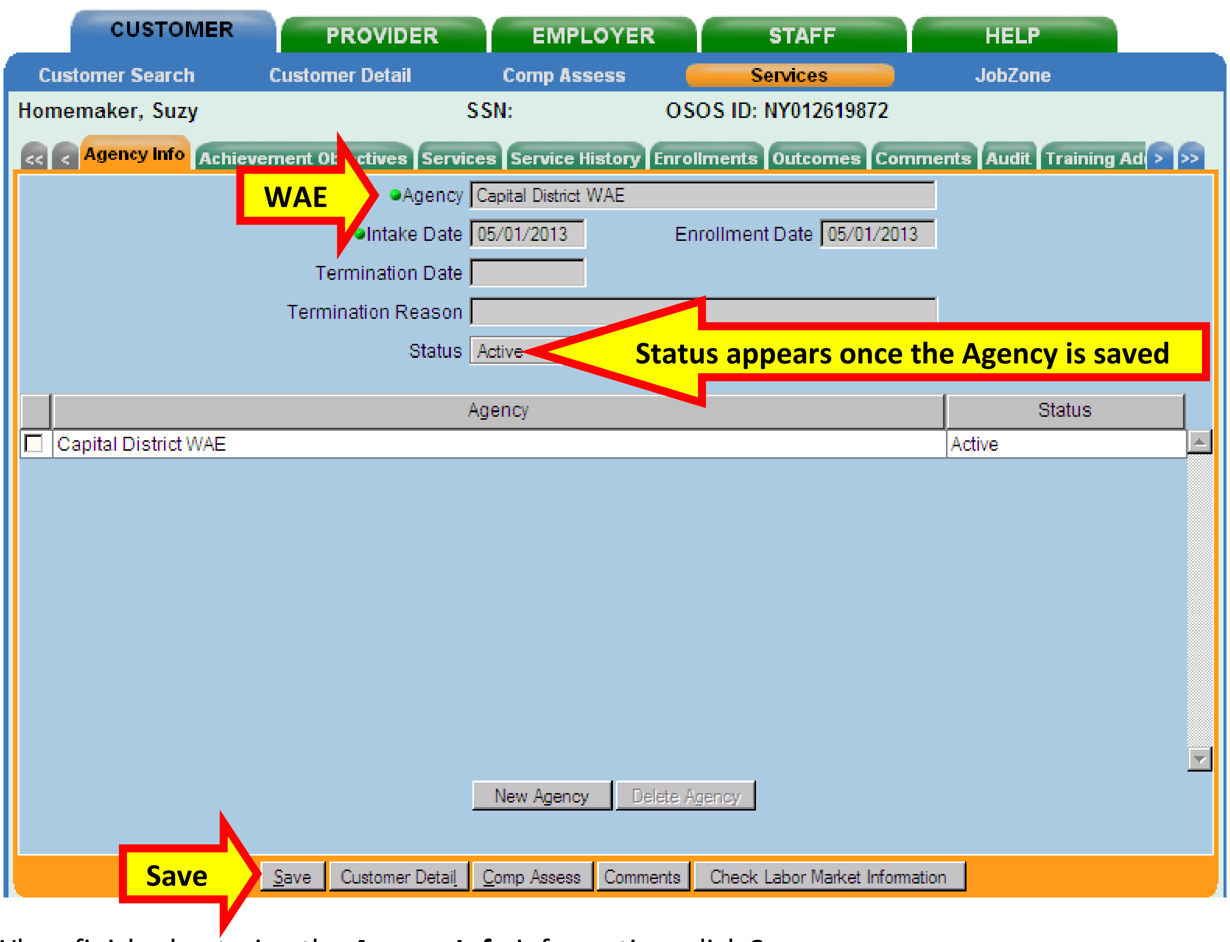
The WAE that must be added to a customer's record will not be the same as the name of your entity/office/center, etc. Each WAE corresponds to a specific Local Workforce Investment Area (LWIA) designated by NYSDOL. It is an OSOS system requirement which must be added before services can be entered.

To add a new active agency on your customer's record, click on **New Agency**.



This will allow access to the data fields in the upper part of the screen.

- **Agency**: Select the geographic WAE that corresponds with the office's location from the drop-down list of options. In the example below, the user's office is the *Capital District Employment and Resource Center*, so the appropriate WAE to select is the *Capital District WAE*
- **Intake Date**: Enter the date when services were first provided to the customer in the format of mm/dd/yyyy. The slashes will automatically populate through the OSOS system
- **Enrollment Date**: Although not green-dotted, this field is required and is usually entered as the same date enter as the **Intake Date**



When finished entering the **Agency Info** information, click **Save**.

It is possible that the WAE corresponding to the office location may already be listed as an ***active*** agency on the customer's record. If this is the case, ***do not*** add a new agency entry - instead, continue with the following steps to add services.

OSOS
One-Stop Operating System

ADDING A DHP SERVICE

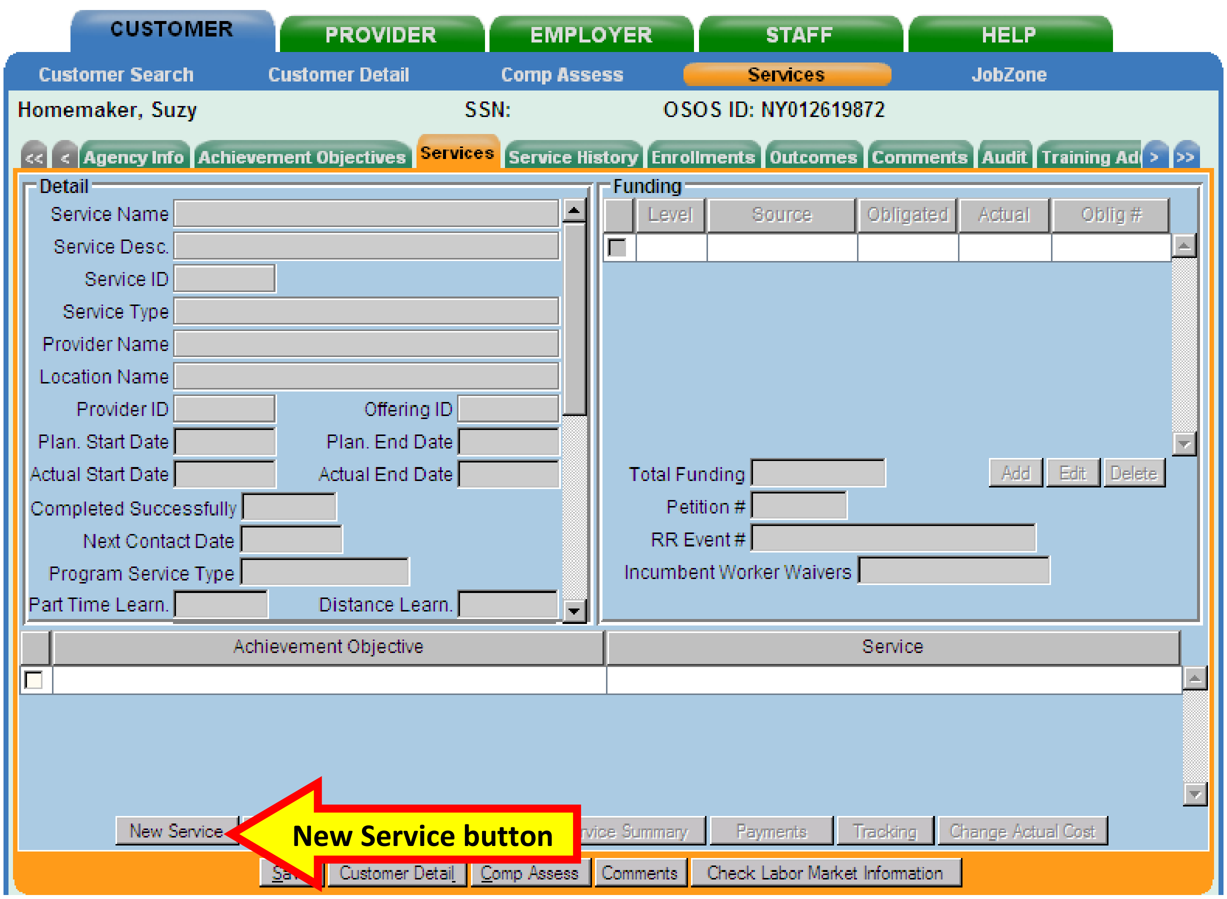
DHP funded services must be entered as L2 services in the Services module. *No DHP funded service should be entered using the Activity button.*

DHP funded services will create a standalone enrollment.

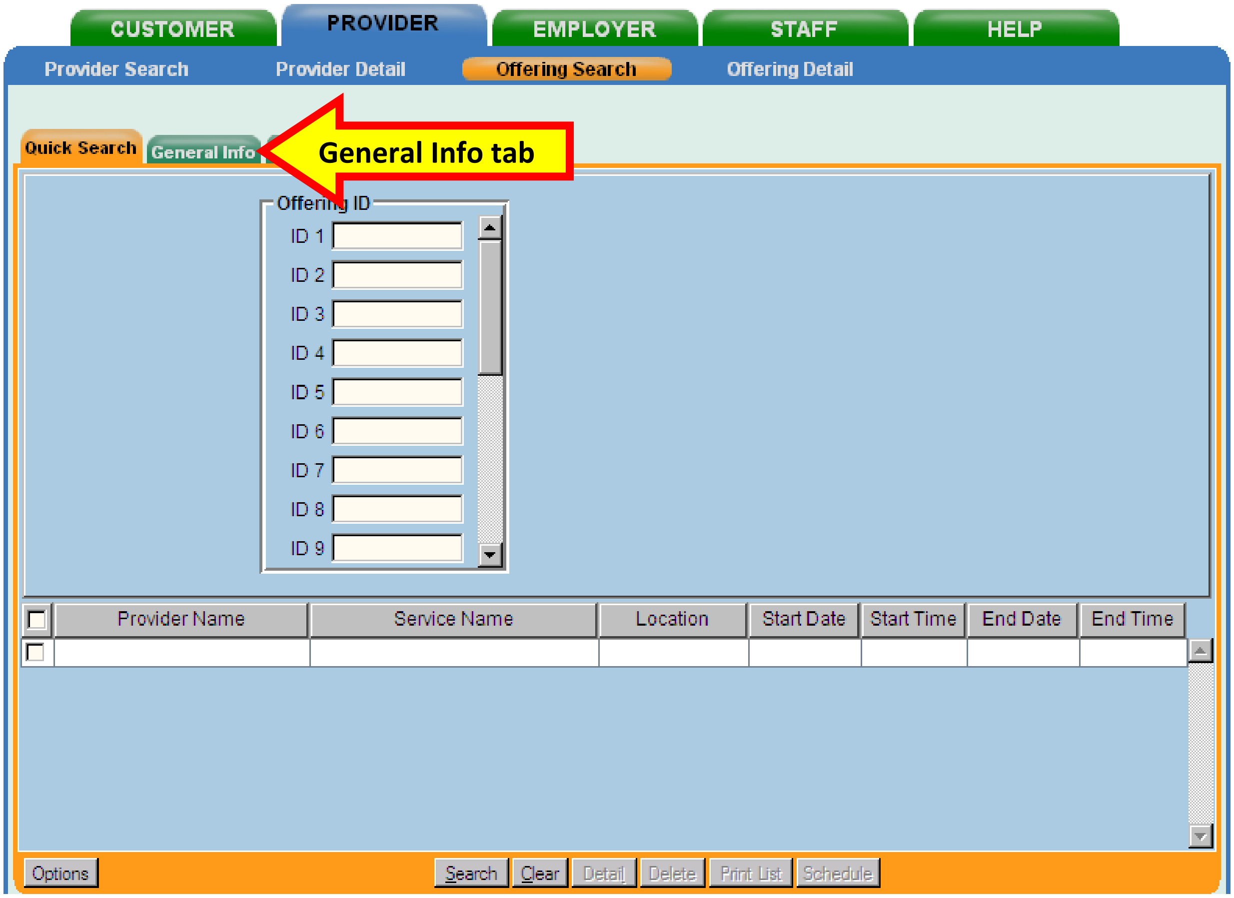
If DHP funded services are mistakenly entered using the Activity button, they will automatically generate a Wagner / Peyser enrollment. The decision to co-enroll customers into the WIA or Wagner / Peyser program is the responsibility of the DHP grant recipient and Local Workforce Investment area.

Local Workforce Investment Areas (LWIAs) may also be providing staff assisted core, intensive, or training services to the customer, and the customer may be co-enrolled with WIA and/or Wagner / Peyser program funds.

To add a new DHP service to the customer's record, you will need to start on the **Services** tab of the **Services** window. Click on the **New Service** button towards the bottom of the screen.



OSOS will automatically navigate to the **Quick Search** tab in the **Offering Search** window. Click the **General Info** tab.

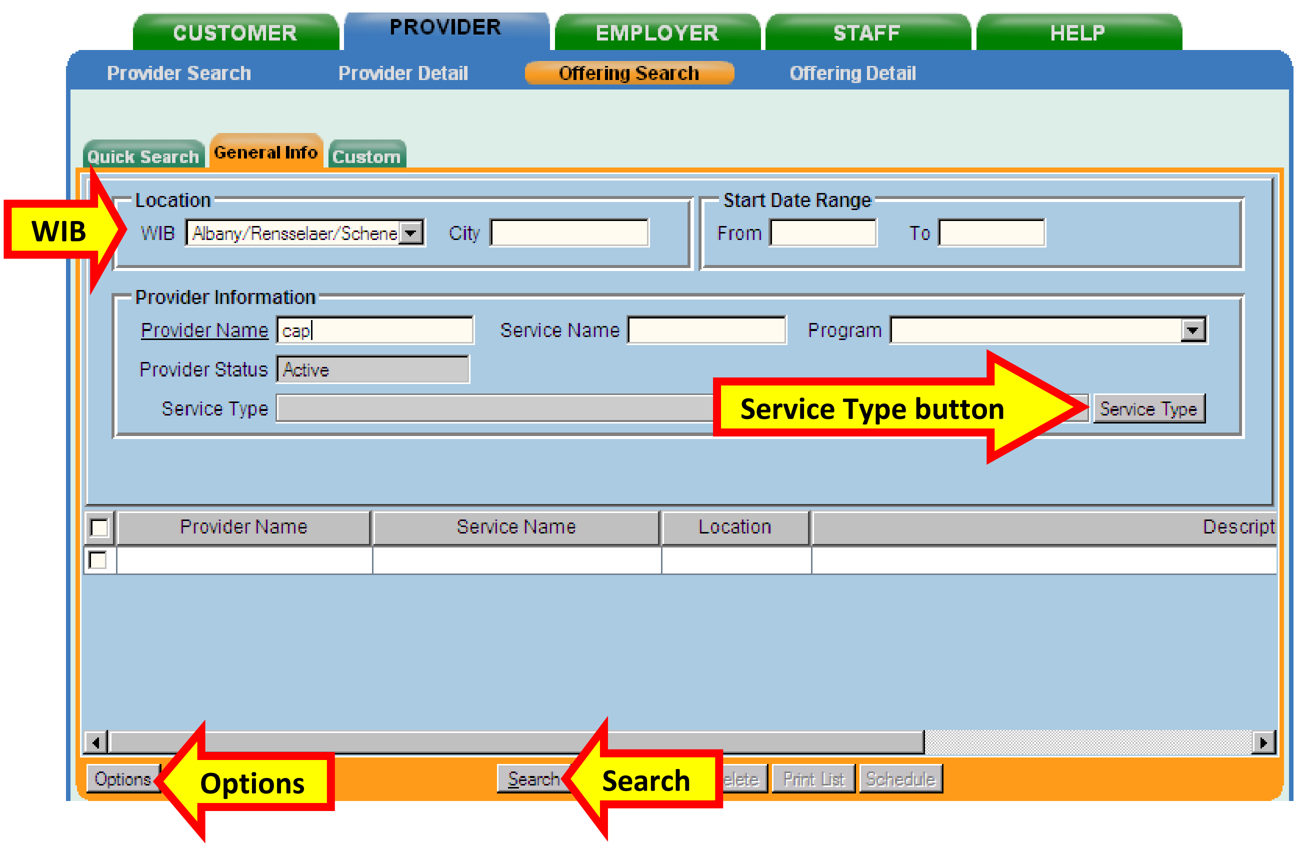


In the **General Info** tab, OSOS will automatically default to the WIB in which the user has logged in. Add additional information that is known to narrow the search for the appropriate service.

Enter the following search criteria, if known:

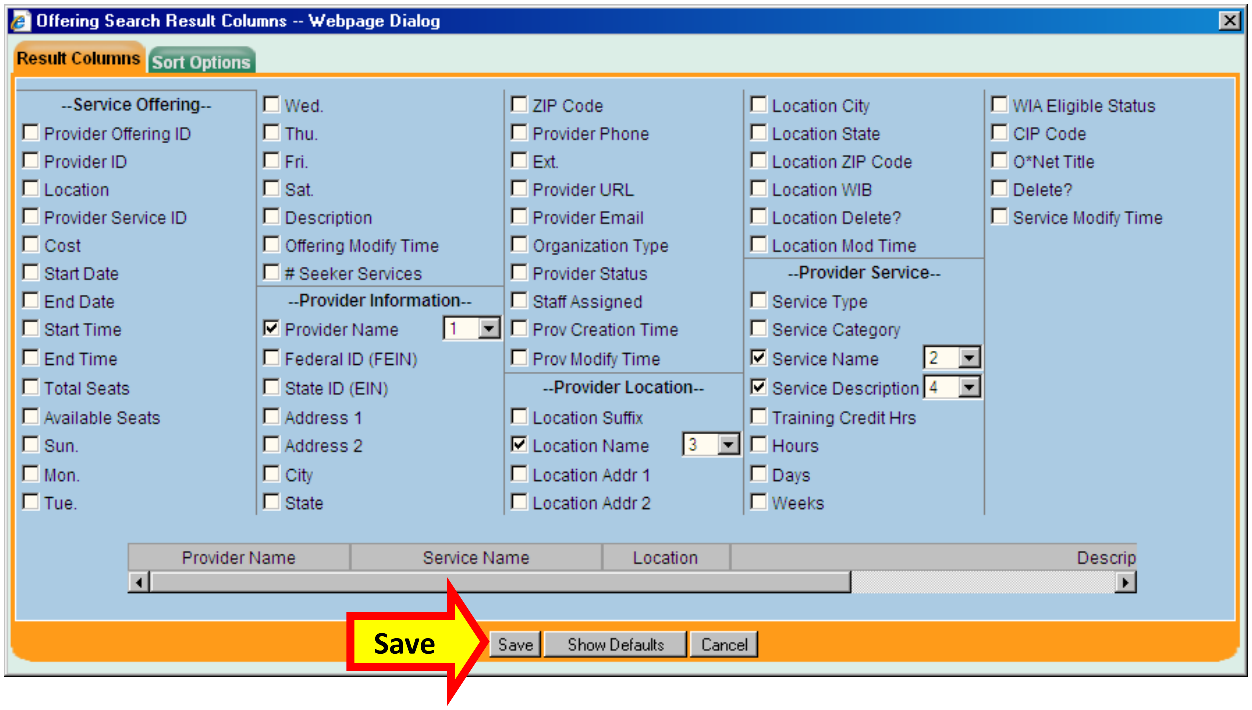
- **WIB**: select the **WIB** (Workforce Investment Board) from the drop-down menu corresponding to the county where the DHP office is located
- **Provider Name**: Enter the first few letters or words of the DHP office name
- **Service Name**: Enter the first few letters or words of the service name
- **Service Type button**: Select the appropriate service type from the drop down menu
- **Options**: The Options button will allow the user to select what categories and in which order to display in the search results. The user may also choose to view *25*, *50* or *100* search results at a time

*Since provider names are often abbreviated or truncated in OSOS, it is highly advisable to enter only the first few letters of the name in the **Provider Name** field. Typing and searching on the entire provider name will often result in no search results found.*



The Options button will allow the user to select what categories and in which order to display in the search results.

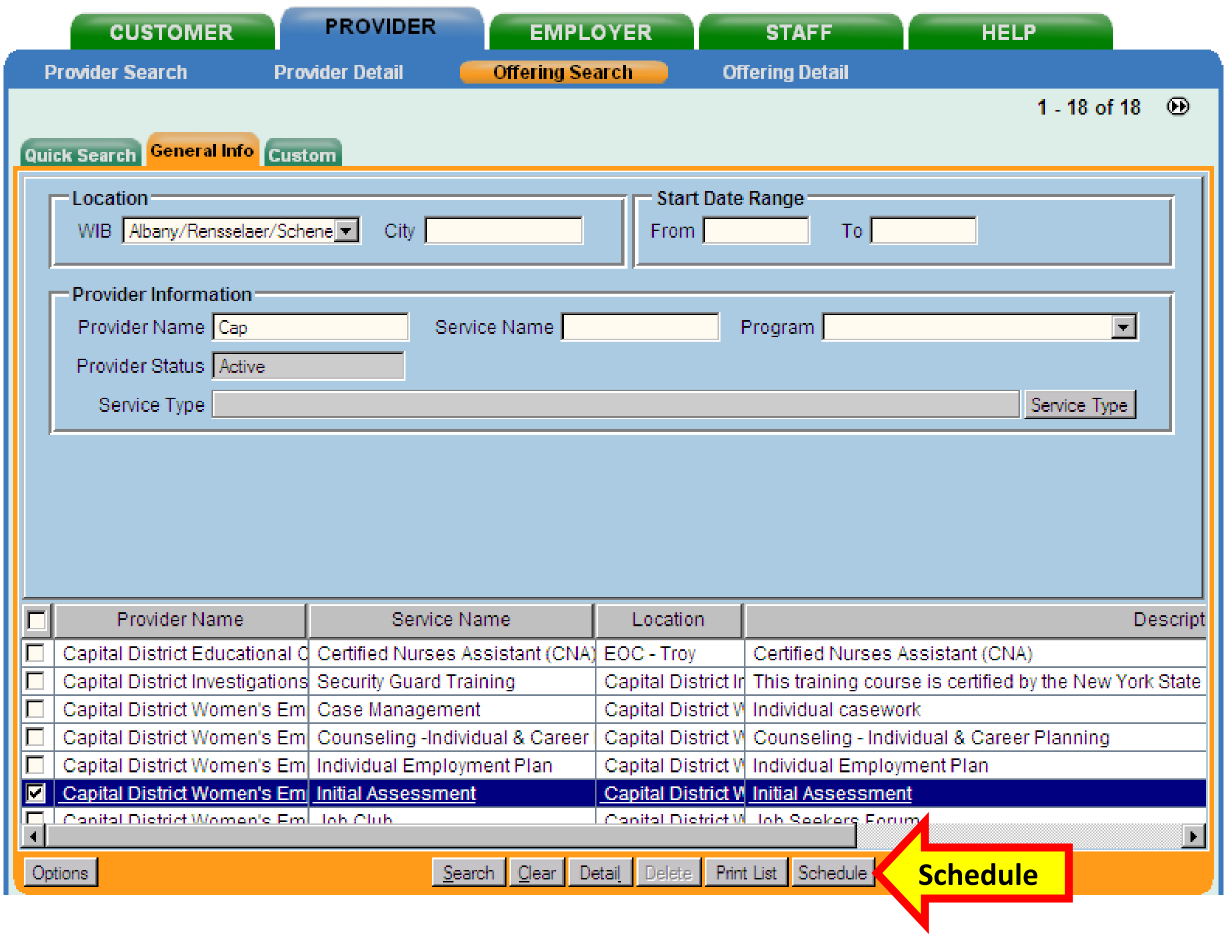
When finished entering the search criteria, click the **Search** button.



Click the **Save** button when finished.

This will return a list of search results. If more than one provider entity is listed in the search results, click the **Service Name** column header to sort the results in ascending or descending order. Click the column header again to reverse the order.

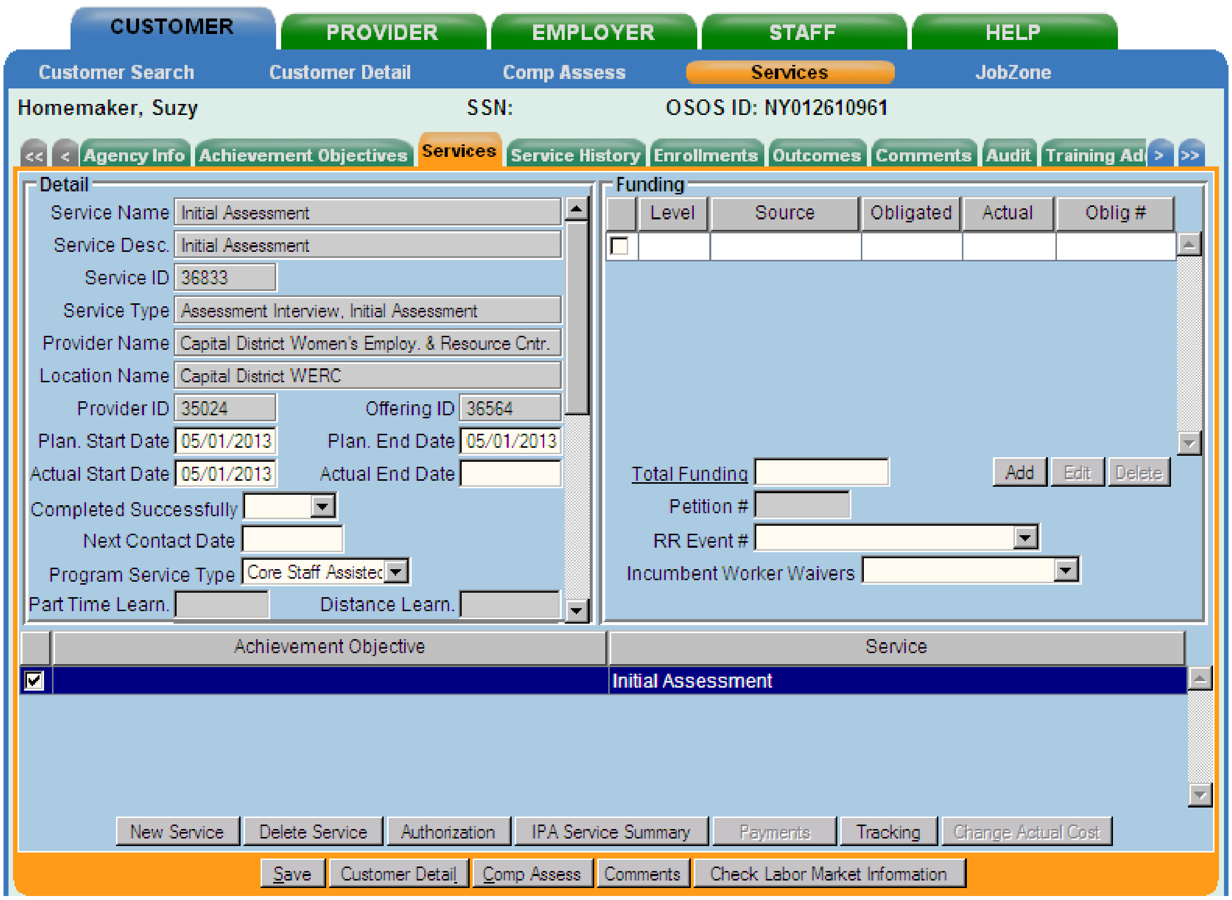
Review the information to identify the appropriate service. Click the checkbox to select the service. Click the **Schedule** button.



OSOS will automatically navigate back to the **Services** tab with the newly added service. Complete the required fields in the **Detail** section of the tab.

For each service added in OSOS, you must include:

- **Plan. Start Date**: Enter the planned started date when the service is expected to start in the format of mm/dd/yyyy
- **Plan. End Date**: Enter the date the service is expected to end
- **Actual Start Date**: Enter the date the service begins. This cannot be a future date
- **Program Service Type**: Select the program service type corresponding to the service



When these fields have been completed, click the **Save** button.

Note: The Service Detail section must be saved prior to any data entry in the Funding section.

FUNDING THE SERVICE

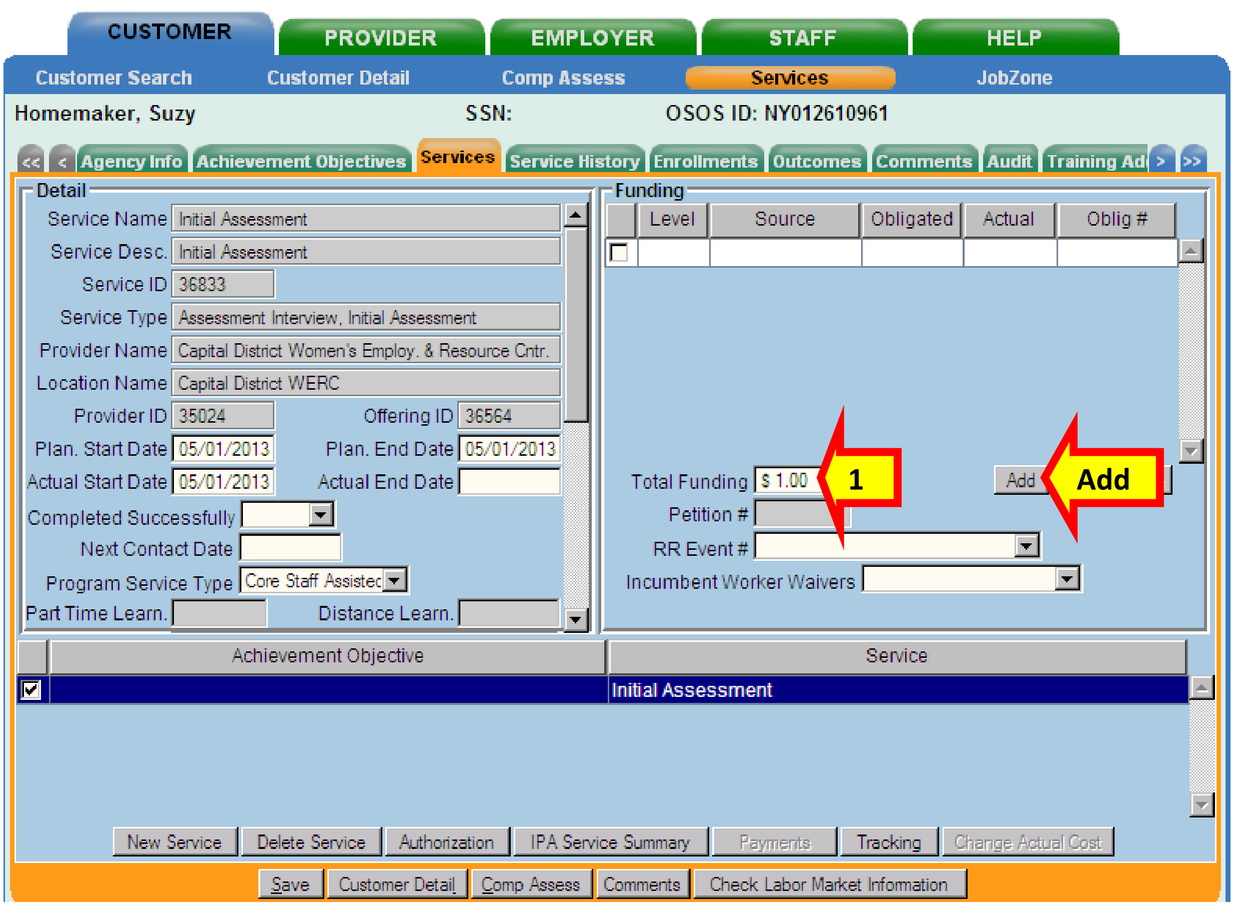
Next, the appropriate funding source must be attached to the service for reporting purposes.

Enter the appropriate amount in the **Total Funding** field based upon the criteria listed below:

- If the user's agency/program is solely providing this service to the customer, enter $1
- If the user's agency/program is providing half of the service to the customer, enter $.50
- If the user's agency/program is providing some other percentage of the service to the customer, enter the appropriate amount in decimal form (e.g., if providing 1/3 of the service to the customer, enter $0.33; if 1/4, then enter $0.25)

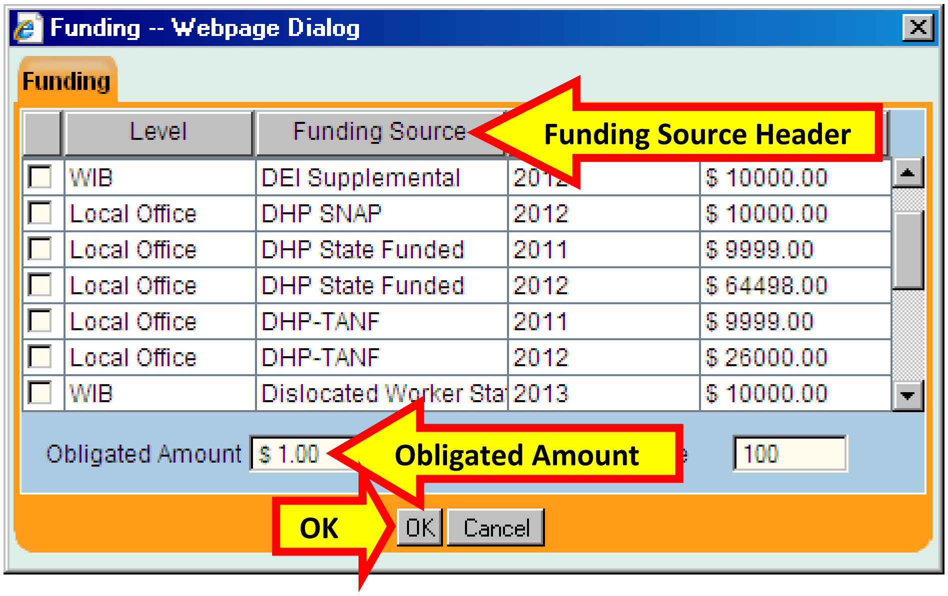
Note: The $1 or decimal amount used to fund services in OSOS is not reflective of any real costs of service. It is the convention used for tracking services in the system. Only use appropriate decimals to fund a service when the customer is being served by more than one agency or program for the same service. The total of all funding must equal $1.

Click the **Add** button.



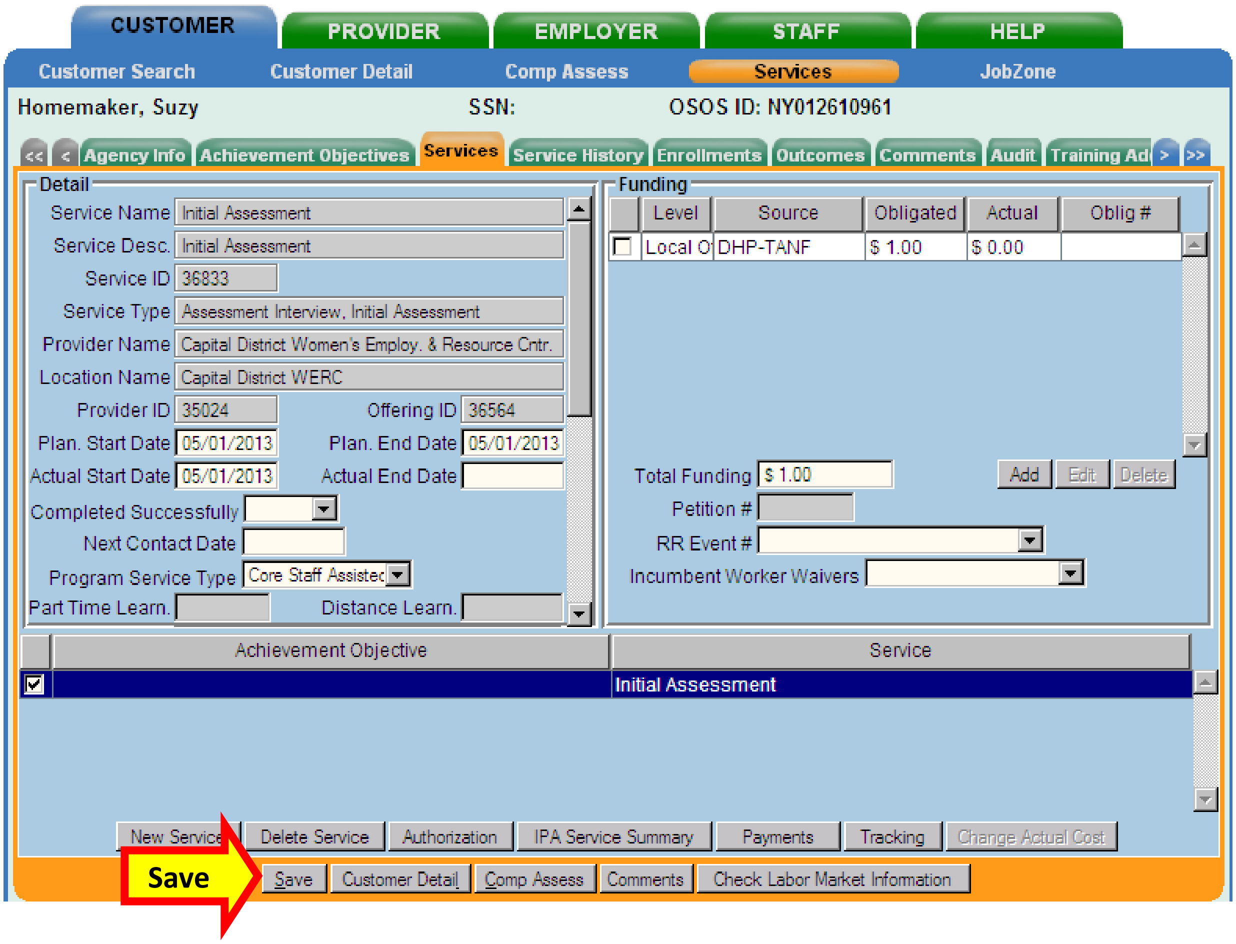
This will bring up the **Funding - - Webpage Dialog** window. Click on the **Funding Source** column header to sort funds and select the appropriate *Local Office* level DHP funding source.

Type $1 again in the **Obligated Amount** field and click **OK**.



*In the **Funding Webpage Dialog** window, only the funding streams authorized for use by an office will be visible for selection. Funding streams may only appear here if the customer is eligible for services funded by a particular program (i.e., the customer must be eligible for DHP-TANF for those funds to be visible).*

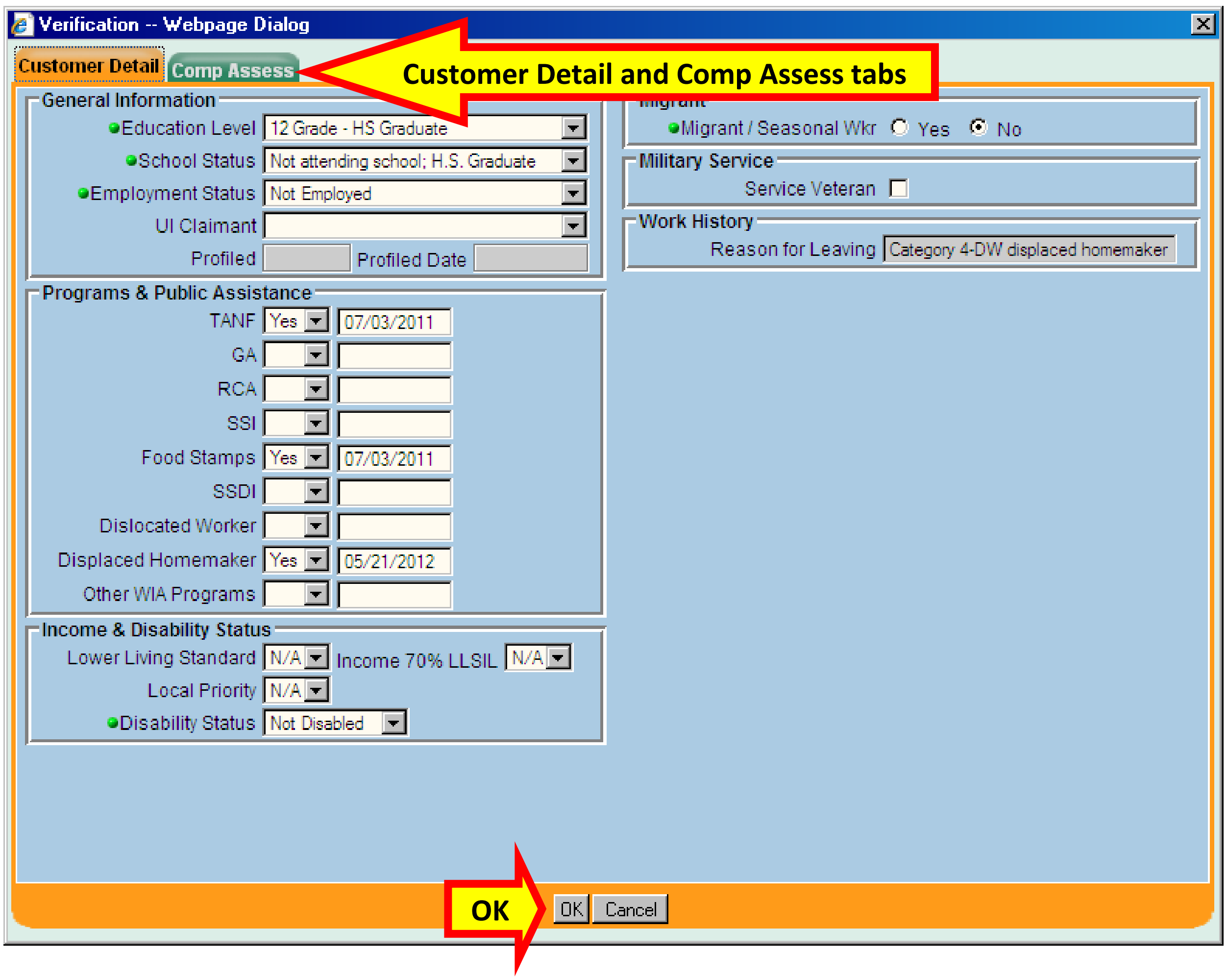
The funding has now been added for this service. Click **Save** to save your changes.



ENROLLMENT VERIFICATION

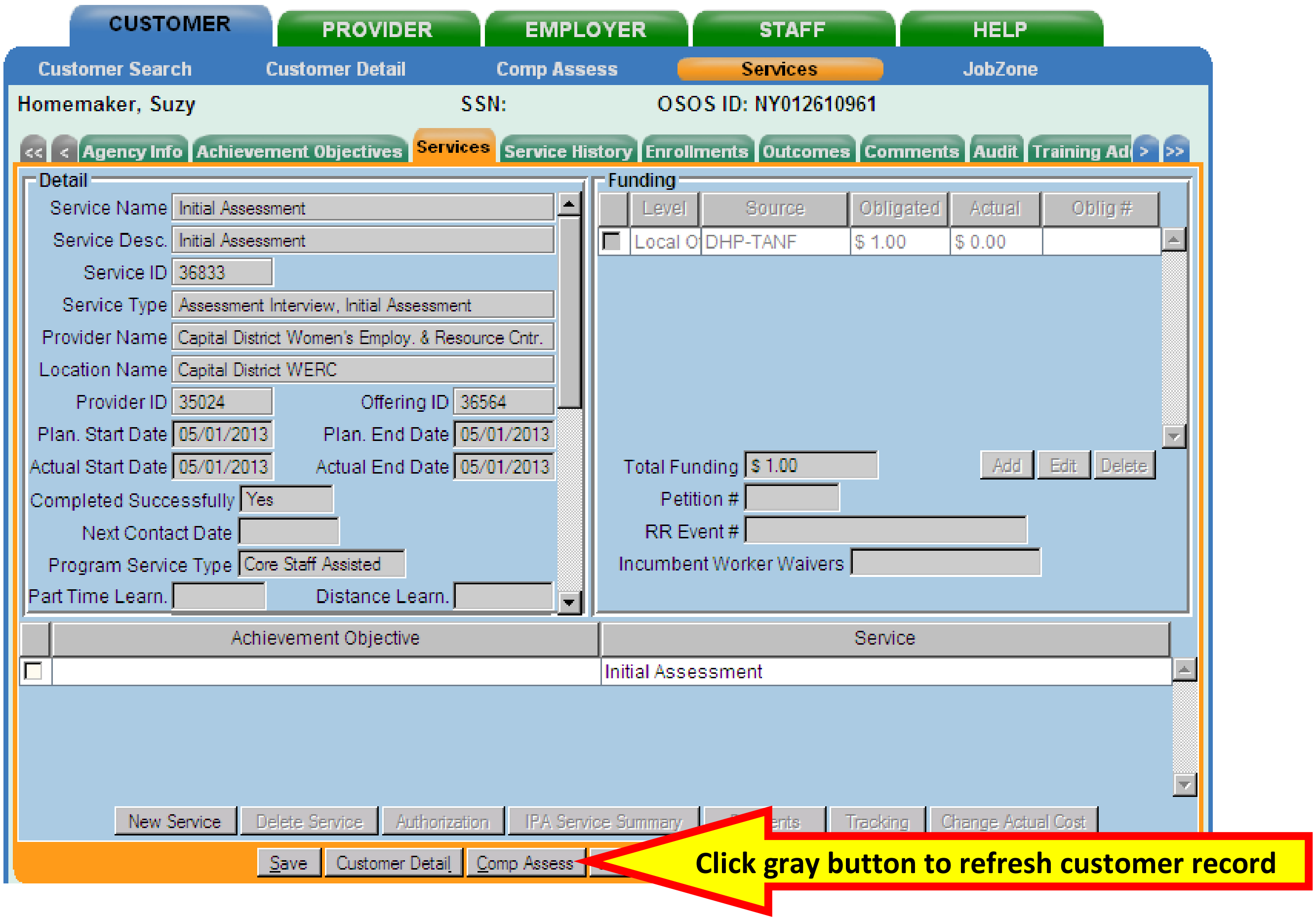
If this is the first time this funding stream has been used to fund a DHP service for this customer, a **Verification - - Webpage Dialog** window will appear, with various fields populated from the **Customer Detail** and **Comp Assess** windows of the customer's record. Review the **Customer Detail** and **Comp Assess** tabs of this window to confirm that the information is correct. Make any applicable changes, if necessary. Any changes made in the **Verification - - Webpage Dialog** window will populate the related data fields throughout OSOS when the page is saved.

Click **OK** to exit the window.

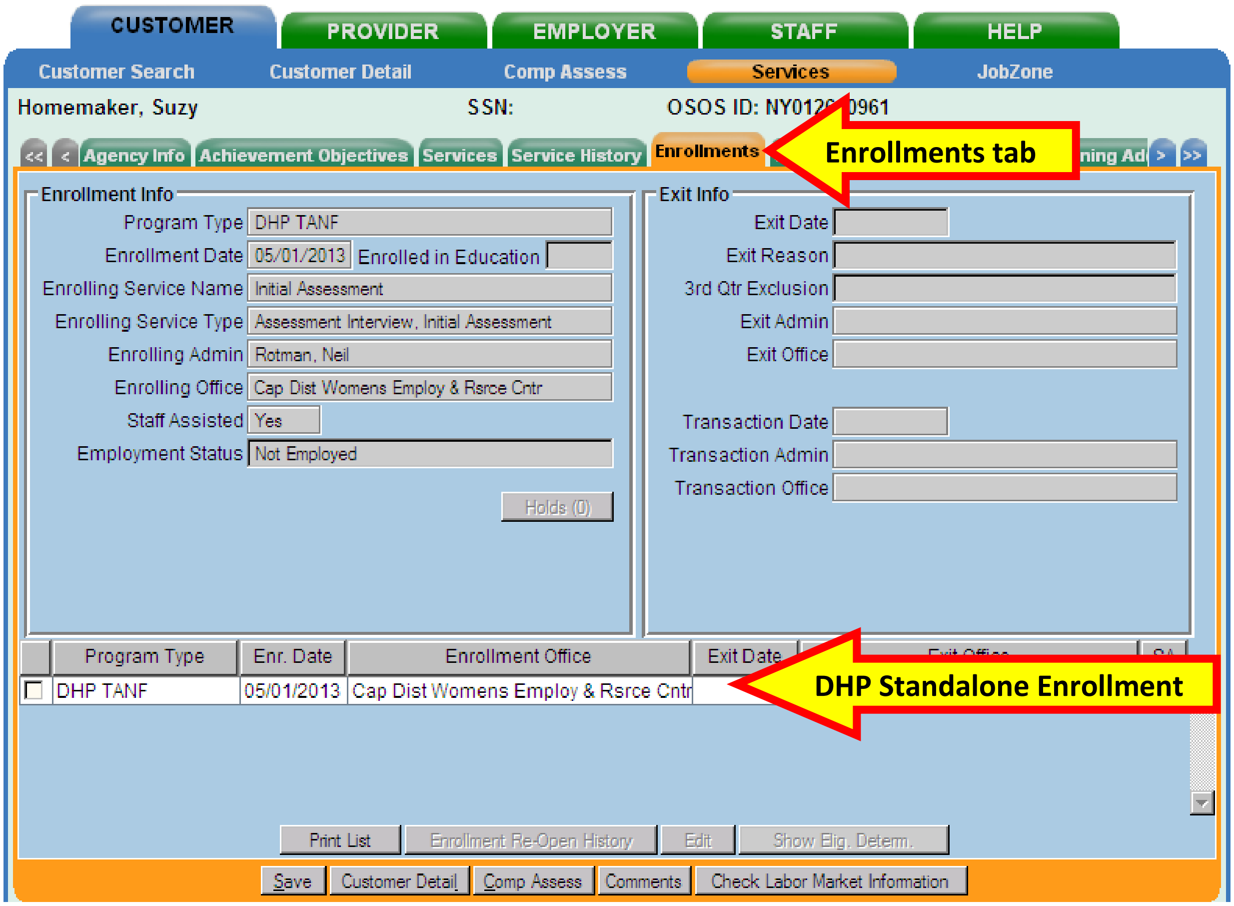


*Be sure to add comments and case notes to support the service provision and describe details about services provided. Record factual information only and include the date the service was provided in the comment (see TA 11-12). Click on the **Comments** button, enter the comment, click the **Save** button to exit the window and then save changes before leaving the **Services** module.*

Once the first DHP funded service and enrollment verification has been saved, the customer record must be refreshed before the enrollment will become visible in the **Enrollments** tab. To refresh the record, click either the gray **Customer Detail** or **Comp Assess** button at the bottom of the page and then click the gray **Services** button to return to the Services window.



Click the **Enrollments** tab. The enrollment will now be visible.

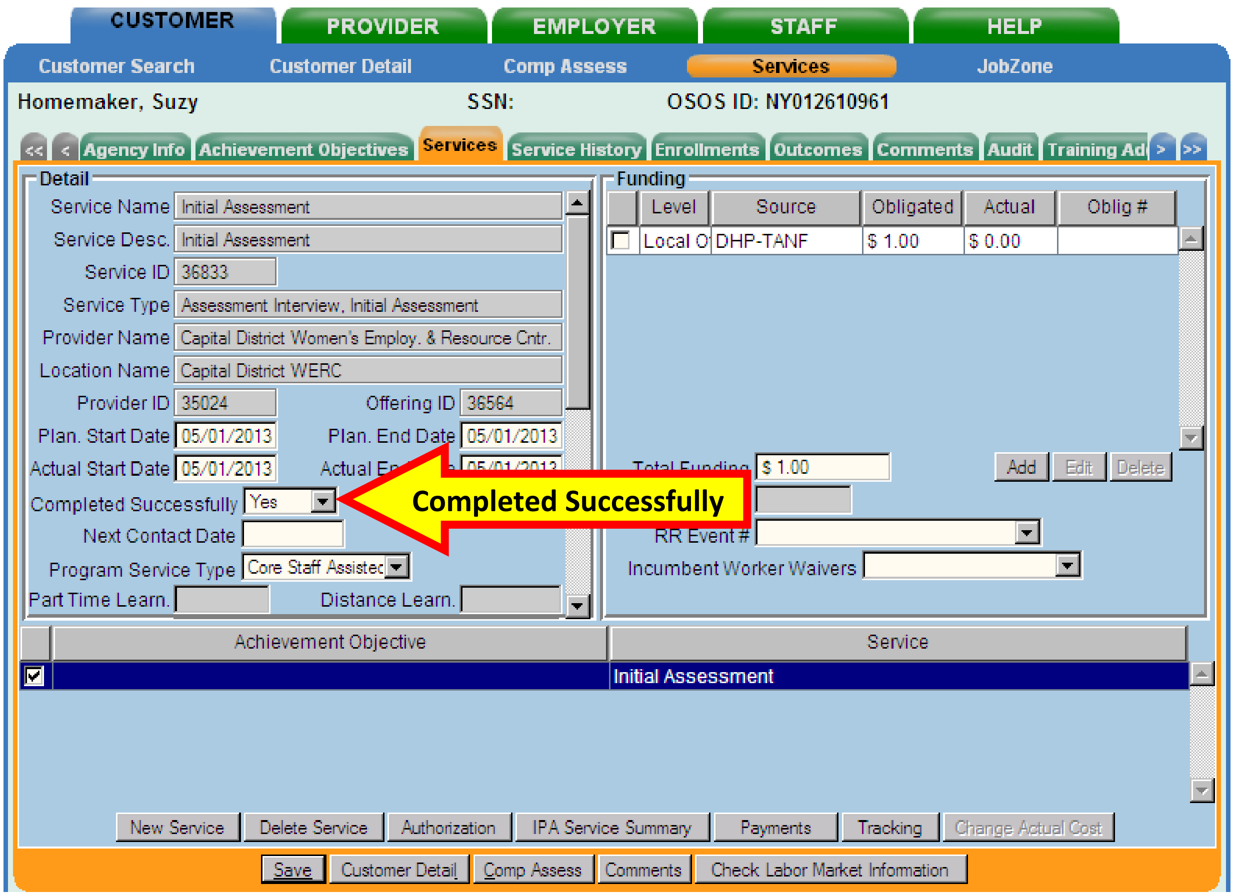


Additional data entry and documentation may be required for customers co-enrolled in WIA and DHP programs with regards towards data element validation (DEV). Refer to TA 11-12: Data Element Validation for the Workforce Investment Act, Wagner-Peyser, Veterans Employment and Training Service and Trade Adjustment Assistance/Trade and Globalization Adjustment Assistance Programs

Ending the Service

When the L2 service has ended, you will need to close the service by adding its end date and indicating whether or not the customer has successfully completed the service:

- **Actual End Date**: Enter the end date of the service in the format of mm/dd/yyyy
- **Completed Successfully**: Select *Yes* or *No* to indicate whether or not the customer successfully completed the service

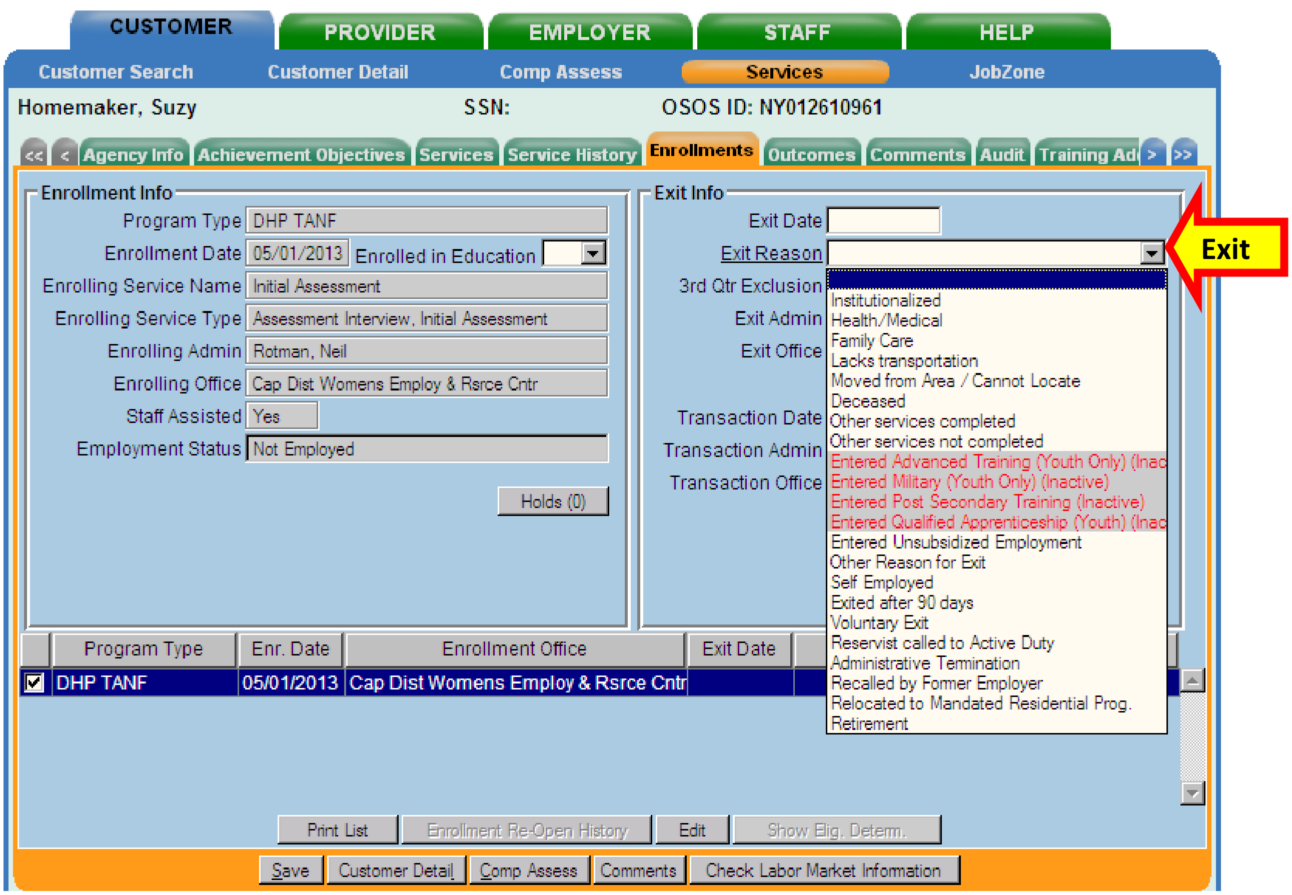


EXITING THE CUSTOMER

If all L2 services have been closed and no services are provided during a 90 day period, the enrollment will automatically exit with the date that the last service ended.

It is possible that the customer may need to be exited previous to the automatic 90 day exit. If any of the following exit reasons applies to your customer, click on the **Enrollments** tab of the **Services** window, select the appropriate enrollment, enter the applicable date when the customer was exited and select one of the following exit reasons from the **Exit Reason** drop-down field: *Deceased*, *Institutionalized*, *Health/Medical*, *Family Care* or *Reservist called to Active Duty*.

Click **Save** to save your changes.



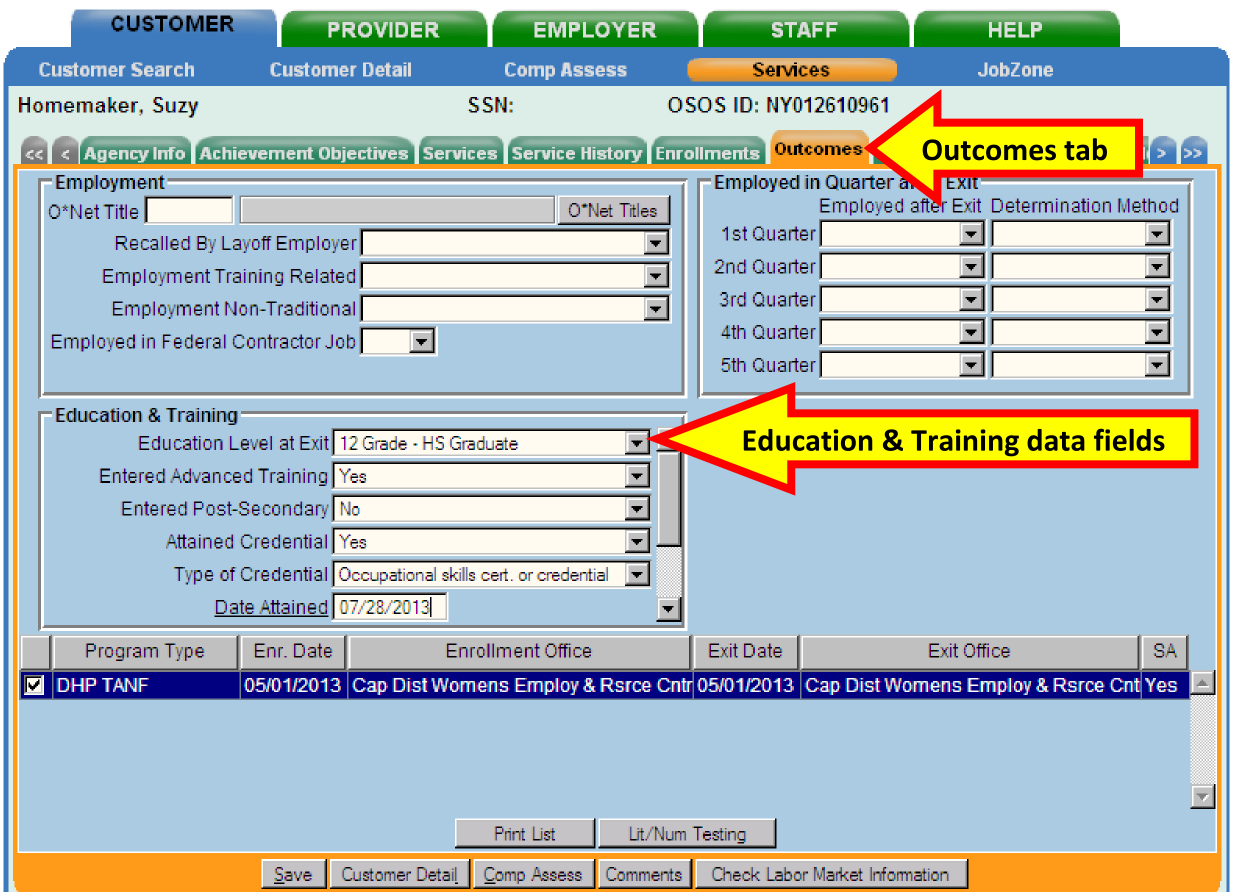
If more than one DHP fund is used to fund services for a customer, two different DHP enrollments will be created. Each enrollment will automatically exit or must be manually exited separately. If one of the DHP funds is no longer used to fund services for the customer, the respective enrollment will exit after 90 days as long as no other services are being funded with those DHP funds.

RECORDING EDUCATION & TRAINING OUTCOMES - OUTCOMES TAB

After the customer has been exited, all outcomes related to employment, education and/or training should be recorded for the customer.

On the **Outcomes** tab of the **Services** window, select the appropriate enrollment and complete the following fields in the **Education & Training** section for the customer after exit:

- **Entered Advanced Training**: Select *Yes* or *No* as appropriate
- **Entered Post-Secondary**: Select *Yes* or *No* as appropriate
- **Attained Credential**: If this field is populated, do not change - if it is blank, choose the appropriate option from the list
- If the customer attained a credential, enter the corresponding **Type of Credential** and **Date attained** fields as well



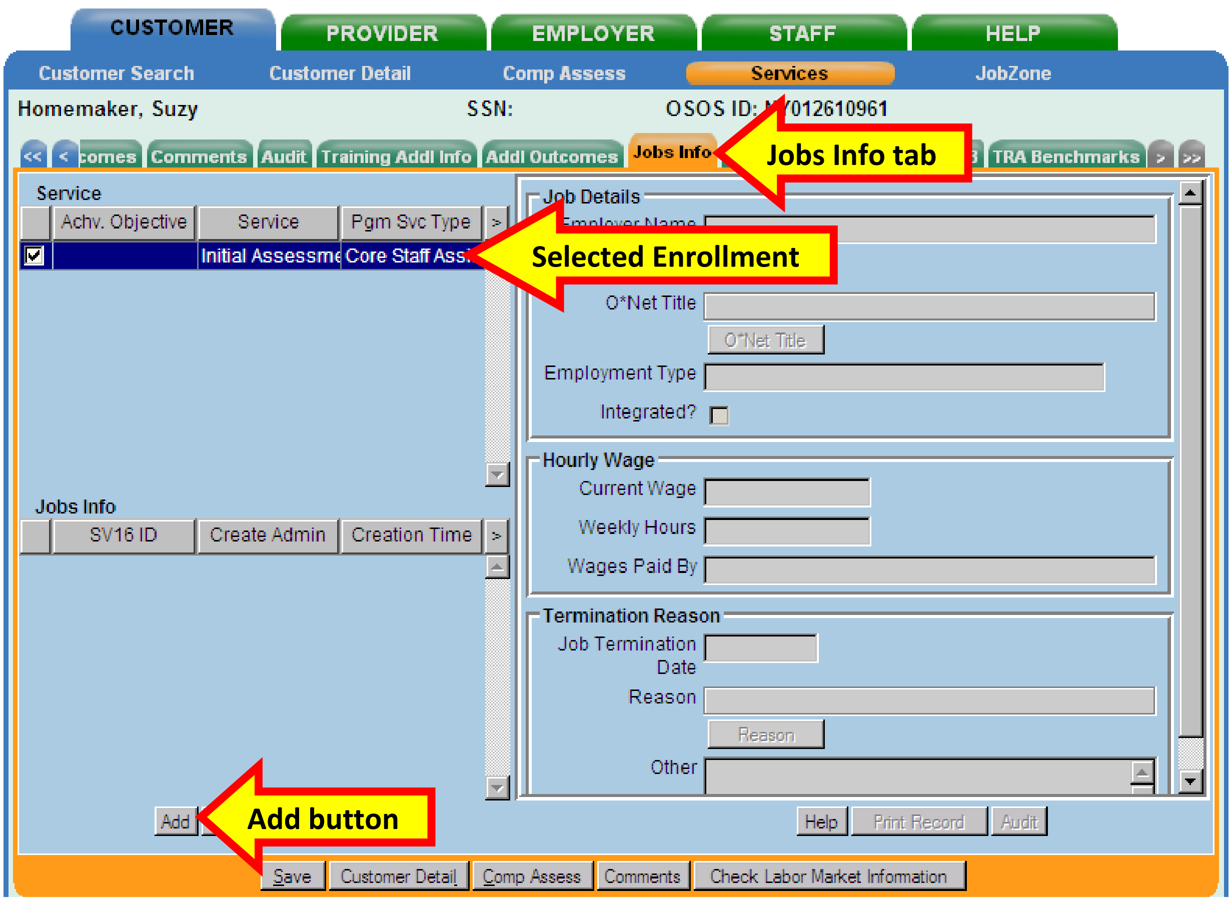
RECORDING EMPLOYMENT OUTCOMES - JOBS INFO TAB

If the customer becomes employed, data enter the information in the **Jobs Info** tab of the **Services** window.

*If the customer is employed, go to the **Gen. Info** tab of the **Customer Detail** window and update the **Employment Status** field. Select **Employed** and change the **Job Seeker** status to **Inactive** if the customer is not looking for work. This is good case management for all staff working with the customer and will prevent the customer from receiving job matches and referrals while actively employed.*

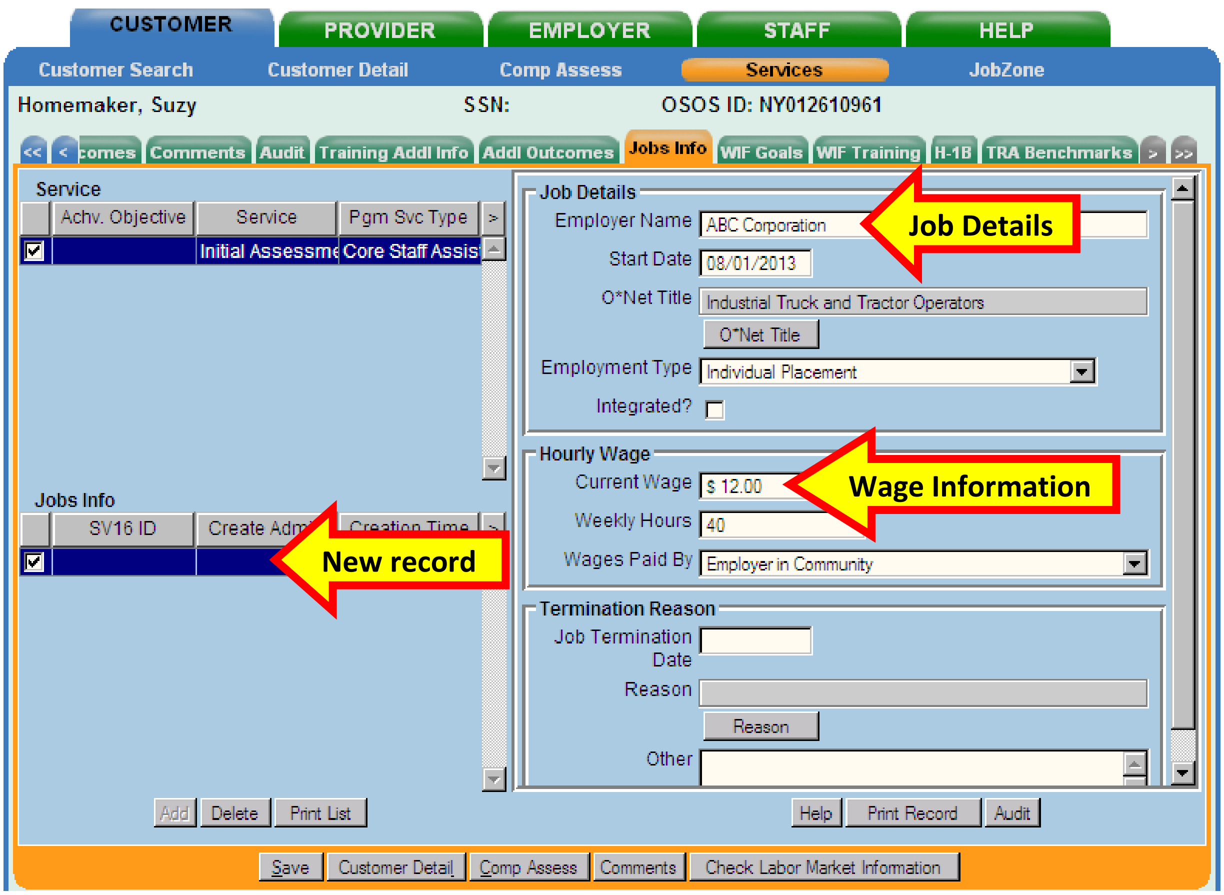
Select the appropriate enrollment in the **Jobs Info** tab.

Click the **Add** button.



This will create a new **Jobs Info** record and activate the fields on the right hand side of the tab for data entry. Be sure to enter the following fields if the customer has a job placement outcome to record:

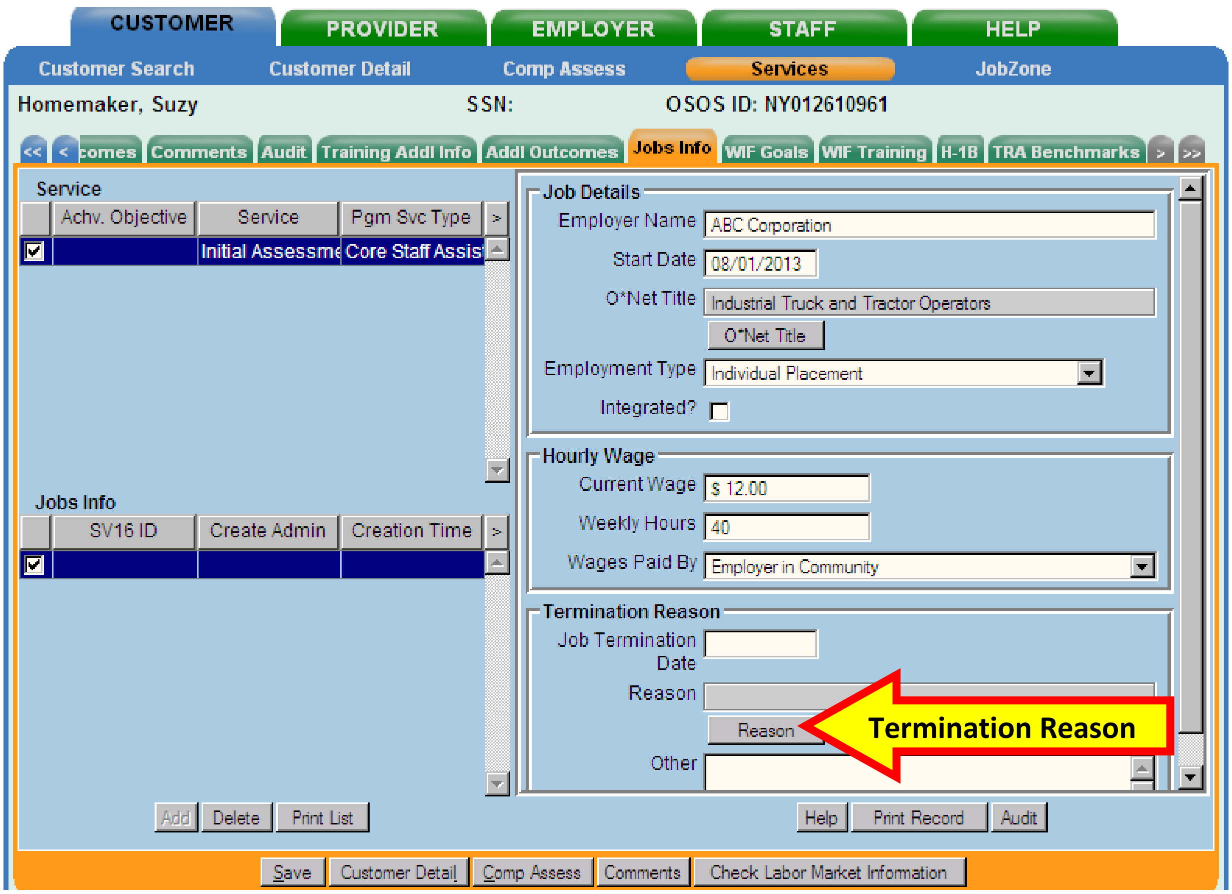
- **Employer Name**: Enter the name of the employer where the customer is employed
- **Start Date**: Enter the date when the customer started work with this employer
- **Current Wage**: Enter the customer's hourly wage at this job
- **Weekly Hours**: Enter the number of hours the customer works each week



Click **Save**.

If the customer stops working at this place of employment at any time, this information should be entered in the **Termination Reason** fields.

- **Job Termination Date**: Enter the date the customer stopped working at this job
- **Reason**: Click the **Reason** button. Select the appropriate reason from the **Reason Hierarchy - - Webpage Dialog** describing why the customer stopped working at the job (*Moved*, *Quit Job*, etc.)
- **Other**: Enter the reason the customer stopped working at the job in this field only if there is no corresponding reason in the **Reason Hierarchy - - Webpage Dialog**



*If at any time, any of the customer's information changes on this tab, such as **Current Wage**, **Weekly Hours** or **Job Termination Date/Reason**, please update the information and save the changes.*

RESOURCES AND ASSISTANCE

List of NYS Displaced Homemaker Centers
http://www.labor.ny.gov/careerservices/displaced-homemaker.shtm

TA 11-12: Data Element Validation for the Workforce Investment Act, Wagner-Peyser, Veterans Employment and Training Service and Trade Adjustment Assistance/Trade and Globalization Adjustment Assistance Programs
http://labor.ny.gov/workforcenypartners/ta/TA11-12.pdf

Additional program information, OSOS guides and other resources can be found at:
http://labor.ny.gov/workforcenypartners/tools.shtm

Language Services OSOS Guide**:** http://labor.ny.gov/workforcenypartners/osos/osos-guide-language-services.pdf

OSOS Accounts Unit:
By phone: (518) 457-1964
By email: osos.wdtd@labor.ny.gov

Accessing the System: http://labor.ny.gov/workforcenypartners/osos/osos-guide-accessing-the-system.pdf

Interagency Agreement: http://www.labor.ny.gov/workforcenypartners/ta/ta00-41att.html

Individual Access and Confidentiality Agreement:
http://www.labor.ny.gov/workforcenypartners/ta/ta00-41att2.html

OSOS confidentiality training:
http://www.nyess.ny.gov/training/hipaa_security/Cornerstones/Confidentiality_Home.htm

For further assistance, please contact the OSOS Help Desk:
By phone: (518) 457-6586
By email: help.osos@labor.ny.gov