

DVOP

My Case Load Tab

OSOS Guide



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PURPOSE

OSOS users have the ability to create a personal case load to manage both customer and business contact records.

Users can view their own case load, but not the case load of other users.

A customer and/or business contact can be included in more than one staff person's case load.

A user may execute a search using their own case load with customized search criteria and data print or export the results to an Excel spreadsheet.

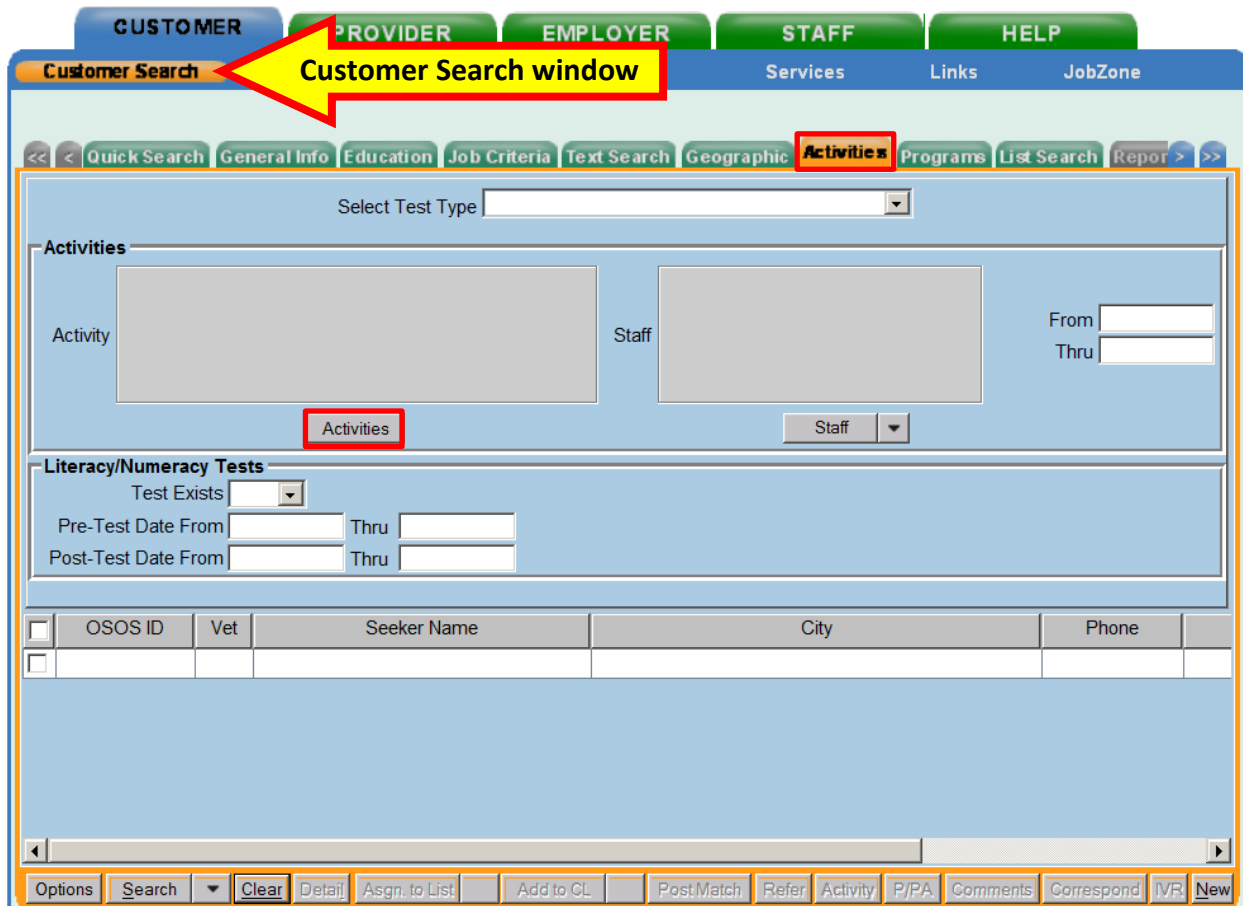
OSOS DATA ENTRY

CREATING AND MAINTAINING THE CASE LOAD

Disabled Veterans' Outreach Program (DVOP) specialists may create their initial case load from past and current DVOP eligible veterans by beginning with a customer search.

Select the **Activities** tab in the **Customer Search** window.

Click the **Activities** button.

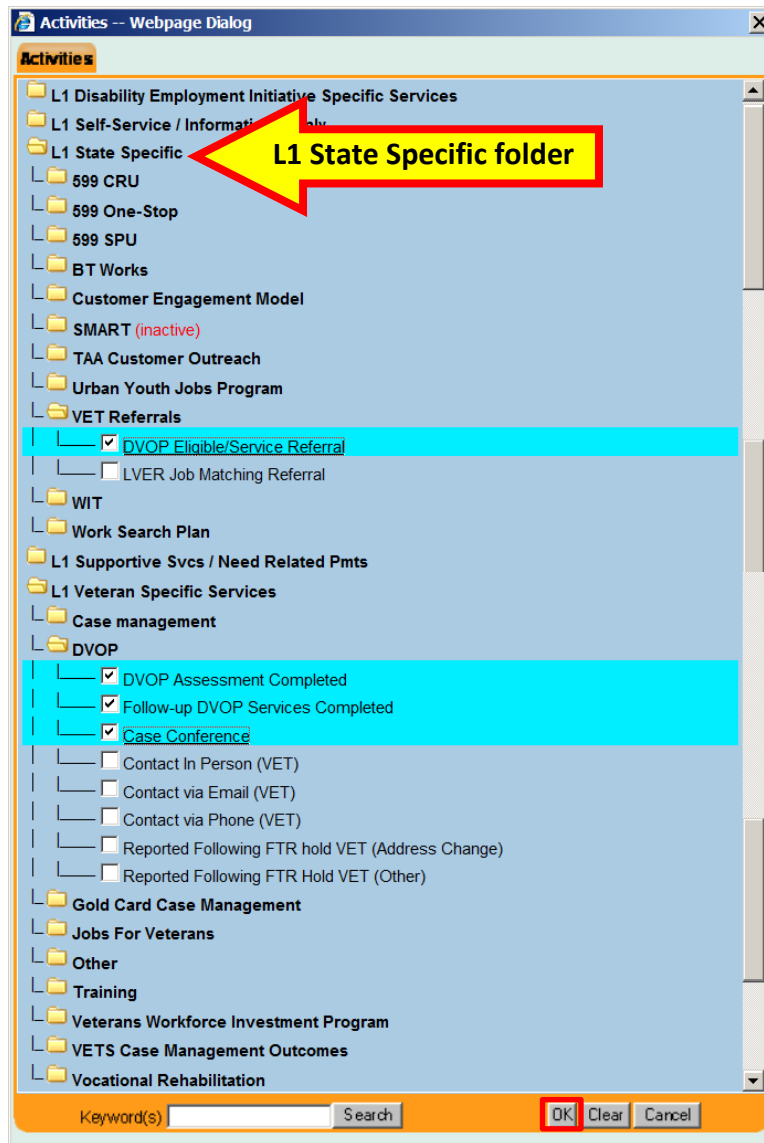


The screenshot shows the OSOS Customer Search window. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these is a navigation bar with buttons for Customer Search, Services, Links, and JobZone. The Customer Search window is highlighted with a yellow arrow and a red box. Inside the window, there are tabs for Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, and Report. The Activities tab is selected and highlighted with a red box. Below the tabs, there is a 'Select Test Type' dropdown menu. The main content area is divided into two sections: 'Activities' and 'Literacy/Numeracy Tests'. The 'Activities' section has two large text input fields labeled 'Activity' and 'Staff', and two date input fields labeled 'From' and 'Thru'. Below these fields is a red box around the 'Activities' button and a 'Staff' dropdown menu. The 'Literacy/Numeracy Tests' section has a 'Test Exists' dropdown menu and two date input fields labeled 'Pre-Test Date From' and 'Thru', and two date input fields labeled 'Post-Test Date From' and 'Thru'. At the bottom, there is a table with columns for OSOS ID, Vet, Seeker Name, City, and Phone. The table is currently empty. At the very bottom, there is a toolbar with buttons for Options, Search, Clear, Detail, Asgn. to List, Add to CL, Post/Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

Select the following four activities within the **Activities - - Webpage Dialog** box:

1. **DVOP Eligible/Service Referral** from the Vet Referrals folder within the L1 State Specific folder
2. **DVOP Assessment Completed** from the DVOP folder within the L1 Veteran Specific Services folder
3. **Follow-Up DVOP Services Completed** from the DVOP folder within the L1 Veteran Specific Services folder
4. **Case Conference** from the DVOP folder within the L1 Veteran Specific Services folder

Click the **OK** button.





Next, click the **Staff** button.

Clicking the arrow next to the **Staff** button will allow DVOP specialists to search for veterans assigned to themselves.

The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, and Links. The main content area is titled 'Activities' and contains a 'Select Test Type' dropdown menu. Below this, there are sections for 'Activities' and 'Literacy/Numeracy Tests'. The 'Activities' section includes a list of activities: Case Conference, DVOP Assessment Completed, DVOP Eligible/Service Referral, and Follow-up DVOP Services Completed. There is also a 'Staff' dropdown menu, which is highlighted with a red box and a yellow arrow pointing to it with the text 'Assigned to Me'. Below the 'Staff' dropdown menu, there are buttons for 'Assigned to Me' and 'Clear'. The 'Literacy/Numeracy Tests' section includes a 'Test Exists' dropdown menu and date fields for 'Pre-Test Date From' and 'Post-Test Date From'. At the bottom, there is a table with columns: OSOS ID, Vet, Status, Seeker Name, WIOA, Rpt Indiv, Ad/DW/RRN, IWT, TAA, and LX. The table is currently empty. At the very bottom, there is a row of buttons: Options, Search, Clear, Detail, Asgn. to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

Enter the last name of the DVOP specialist in the **Keyword(s)** data field and click the **Search** button in the **Staff Assigned - - Webpage Dialog** box:



Select the appropriate name and click the **OK** button.





The four activities and DVOP specialist's name will be visible.

Enter a date range in the **From** and **Thru** data fields to identify any veteran(s) that received any of the four activities within the desired date range. Since these activities were not yet created, DVOP specialists must not enter any dates before February 9, 2015. If the system identifies too many results to display, then edit the date range to lower the results.

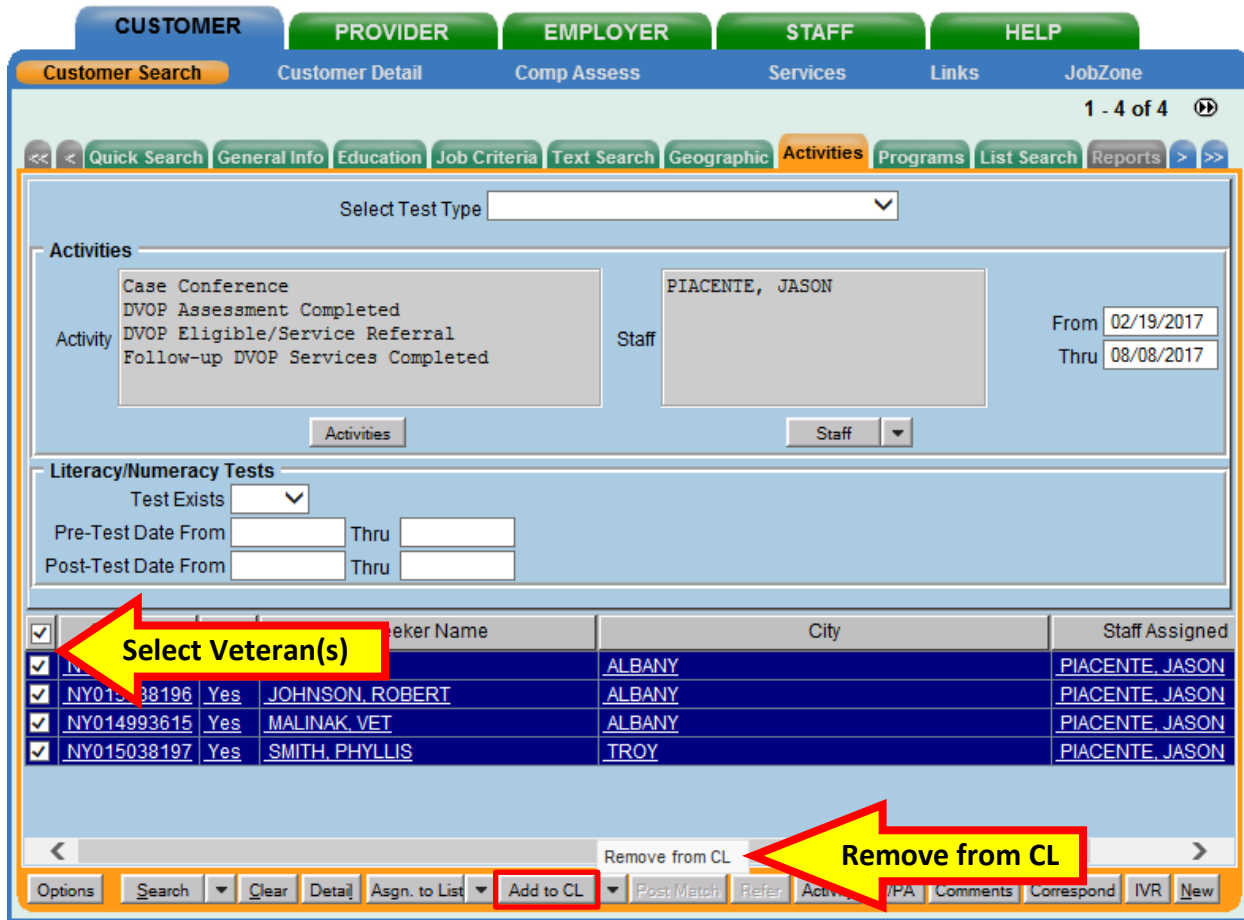
DVOP specialists looking to maintain their existing case load and add newly identified DVOP eligible veterans may choose to do so periodically by adding recent dates. Adding recent dates will help minimize search results that may include veterans currently assigned to the case load.

Click the **Search** button.

The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, and Links. The main content area has a 'Select Test Type' dropdown menu. Below this is a section for 'Activities' with a list: Case Conference, DVOP Assessment Completed, DVOP Eligible/Service Referral, and Follow-up DVOP Services Completed. A 'Staff' field contains the name 'PIACENTE, JASON'. To the right, there are 'From' and 'Thru' date fields with values '02/19/2017' and '08/08/2017' respectively. Below this is a section for 'Literacy/Numeracy Tests' with 'Test Exists' dropdown and date range fields. At the bottom, there is a table with columns: Vet, SSN, OSOS ID, Seeker Name, Staff Assigned, and Office. The 'Search' button is highlighted with a red box. Red arrows point to the 'Activities' list, the 'Staff' field, and the 'From'/'Thru' date fields.

Select the veteran(s) to be added to the case load and click the **Add to CL** button. The **Add to CL** button is accessible and available within all tabs of the **Customer Search** window.

Clicking the arrow next to the **Add to CL** button will access the **Remove from CL** option.



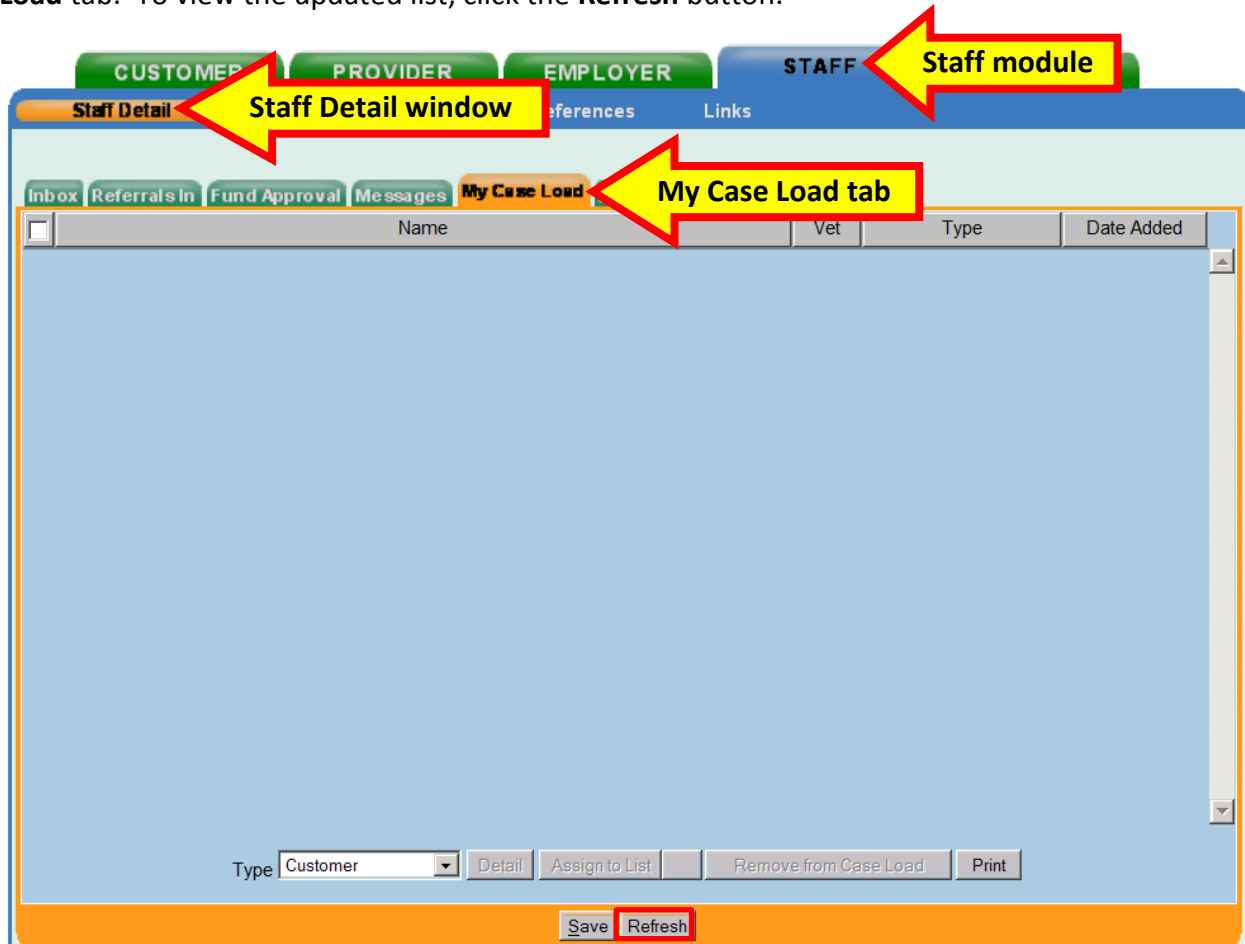
The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The main content area includes a 'Select Test Type' dropdown, an 'Activities' section with a list of activities and a 'Staff' dropdown, and a 'Literacy/Numeracy Tests' section with date filters. Below these is a table of veterans with columns for 'Veteran Name', 'City', and 'Staff Assigned'. A red arrow points to the 'Select Veteran(s)' text in the table header. At the bottom, there is a 'Remove from CL' button with a red arrow pointing to it, and an 'Add to CL' button highlighted with a red box.

<input checked="" type="checkbox"/>	Veteran Name	City	Staff Assigned
<input checked="" type="checkbox"/>	NY015038196	ALBANY	PIACENTE, JASON
<input checked="" type="checkbox"/>	NY015038196 Yes JOHNSON, ROBERT	ALBANY	PIACENTE, JASON
<input checked="" type="checkbox"/>	NY014993615 Yes MALINAK, VET	ALBANY	PIACENTE, JASON
<input checked="" type="checkbox"/>	NY015038197 Yes SMITH, PHYLLIS	TROY	PIACENTE, JASON

Selecting veterans that are already in the case load and clicking the **Add to CL** button will not create a duplicate listing.

The same availability to add and remove business contacts exists within the **Employer** module. However, this feature is not available in the **Provider** module.

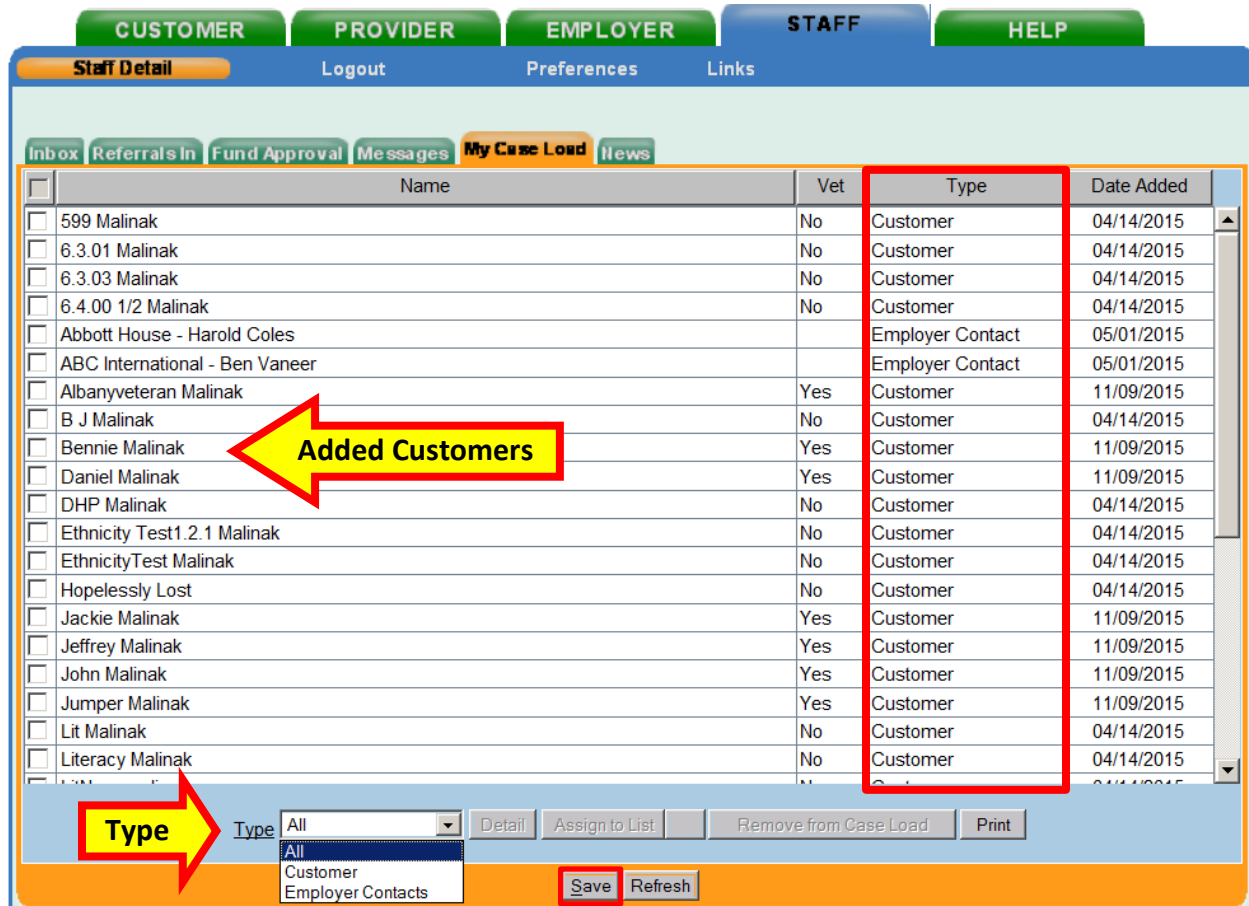
To view the case load, click the **Staff** module, then the **Staff Detail** window, then the **My Case Load** tab. To view the updated list, click the **Refresh** button.



It is necessary to click the **Refresh** button to confirm when veterans and business contacts are removed.

Click the **Save** button when finished.

To view both veteran and business contacts in the case load, select **All** from the **Type** dropdown menu. DVOP specialists may select multiple veterans or business contacts, but may not combine individuals from the two types concurrently when adding, removing, or selecting the **Detail** button.



The screenshot shows the 'Staff Detail' interface with the 'My Case Load' tab selected. A table lists various contacts with columns for Name, Vet, Type, and Date Added. The 'Type' column is highlighted with a red box, and the dropdown menu is open, showing options: All, Customer, and Employer Contacts. A red box also highlights the 'Save' button at the bottom. A yellow arrow points to the text 'Added Customers' in the table, and another yellow arrow points to the 'Type' dropdown menu.

Name	Vet	Type	Date Added
<input type="checkbox"/> 599 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.3.01 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.4.00 1/2 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Abbott House - Harold Coles		Employer Contact	05/01/2015
<input type="checkbox"/> ABC International - Ben Vaneer		Employer Contact	05/01/2015
<input type="checkbox"/> Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> B J Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> DHP Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> EthnicityTest Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Hopelessly Lost	No	Customer	04/14/2015
<input type="checkbox"/> Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Lit Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Literacy Malinak	No	Customer	04/14/2015

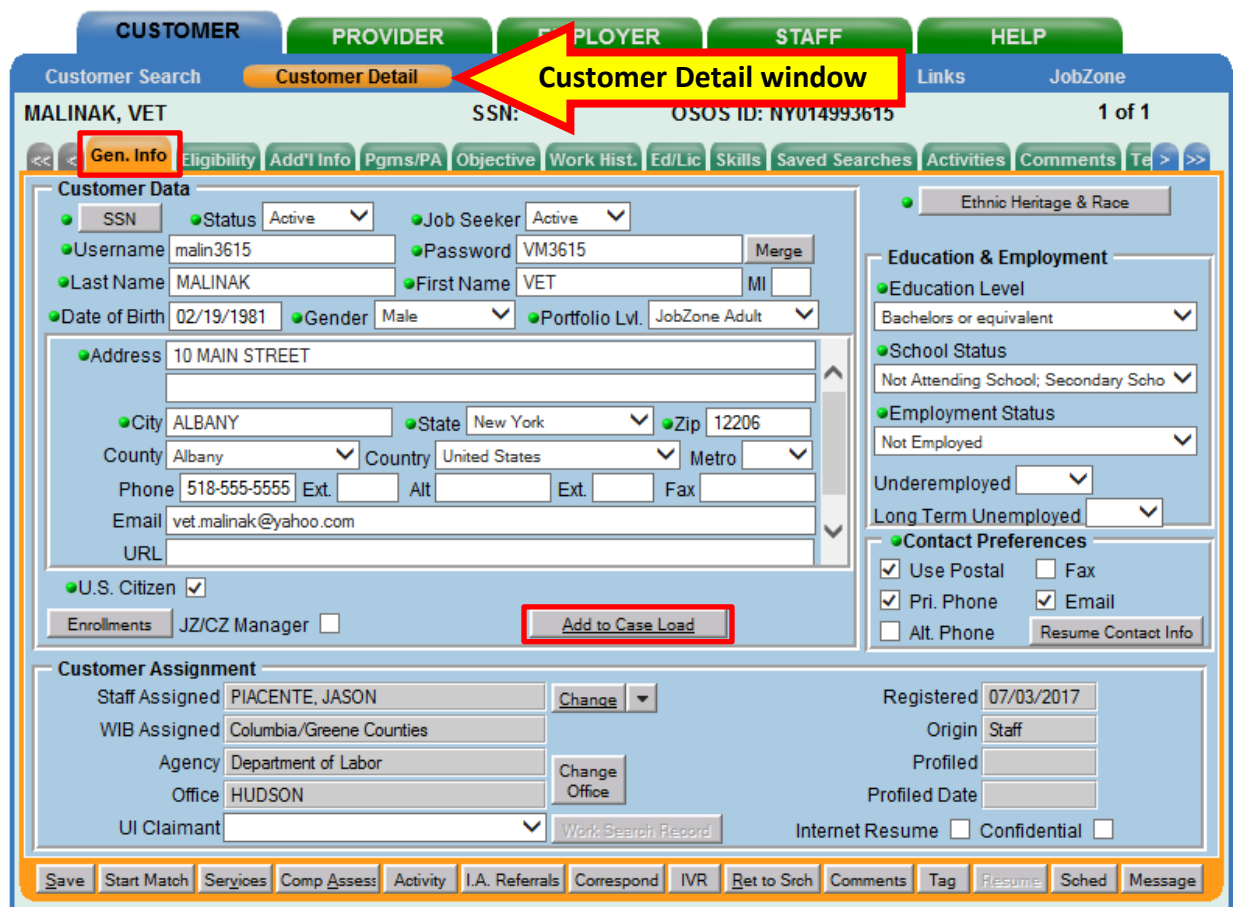
ADDING INDIVIDUAL VETERANS TO MY CASE LOAD

When you are in the veteran’s record, you can add them to the case load. This can be done from the **Customer Detail** window in the **General Info** tab. This feature is not available in the **Comprehensive Assessment** or **Services** tabs.

The **Add to Case Load** button is located in the middle of the screen (highlighted below).

Click the **Add to Case Load** button to add the veteran to the case load.

There is no need to save the record.

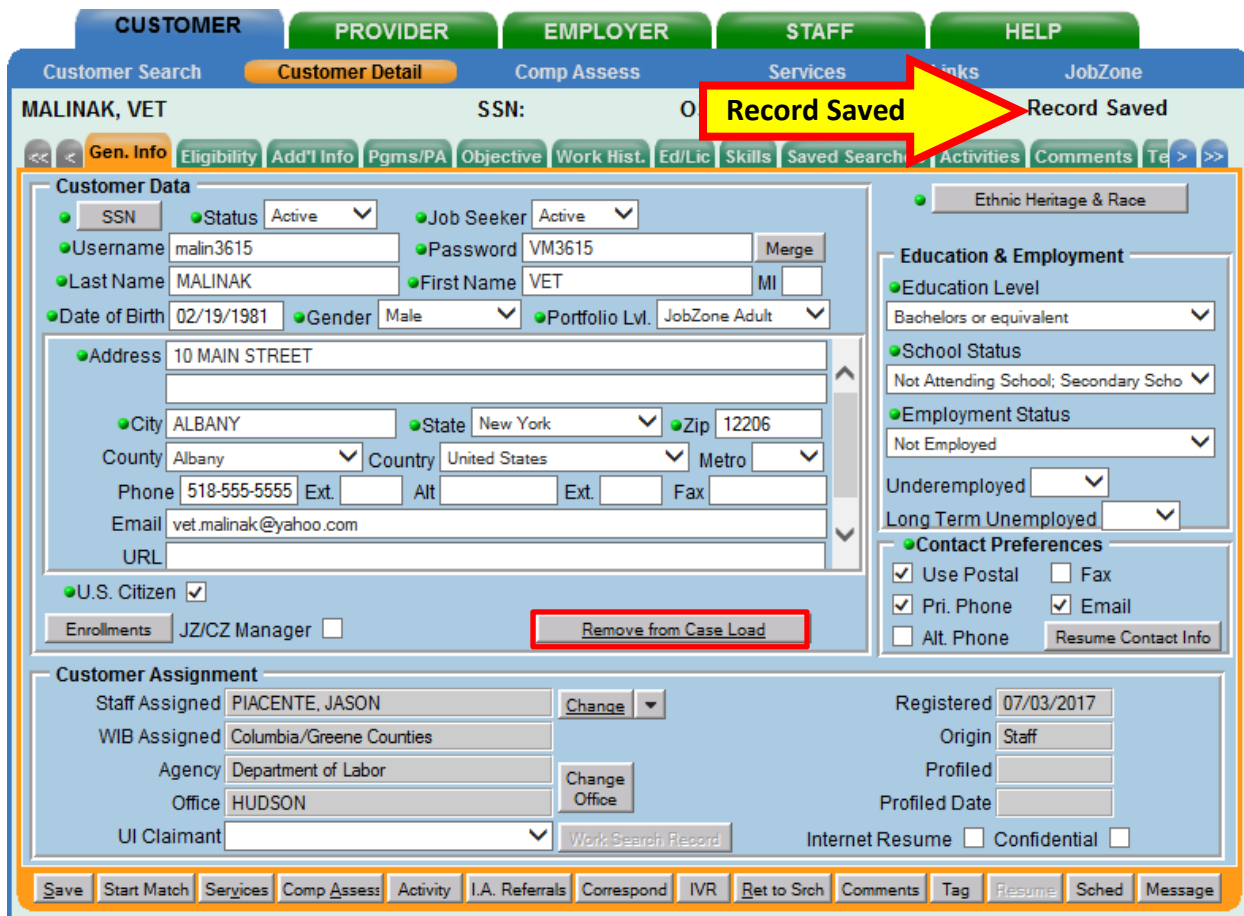


The screenshot shows the OSOS interface for a customer record. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these is a navigation bar with 'Customer Search', 'Customer Detail', 'Links', and 'JobZone'. The main header displays 'MALINAK, VET', 'SSN: OSOS ID: NY014993615', and '1 of 1'. A yellow arrow points to the 'Customer Detail' tab. Below the header is a tabbed interface with 'Gen. Info' selected. The 'Customer Data' section includes fields for SSN, Status (Active), Job Seeker (Active), Username (malin3615), Password (VM3615), Last Name (MALINAK), First Name (VET), Date of Birth (02/19/1981), Gender (Male), and Portfolio Lvl (JobZone Adult). The Address section includes City (ALBANY), State (New York), Zip (12206), County (Albany), and Country (United States). The 'Add to Case Load' button is highlighted with a red box. The 'Customer Assignment' section shows Staff Assigned (PIACENTE, JASON), WIB Assigned (Columbia/Greene Counties), Agency (Department of Labor), Office (HUDSON), and UI Claimant. The 'Contact Preferences' section includes checkboxes for Use Postal, Fax, Pri. Phone, Email, and Alt. Phone. At the bottom, there is a row of buttons: Save, Start Match, Services, Comp Asses, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.

After adding the record to the case load, the “Record Saved” confirmation message will briefly appear in the top right hand corner.

The **Add to Case Load** button will have changed to a **Remove from Case Load** button.

The availability of the **Remove from Case Load** button confirms that the veteran has been added to the case load.

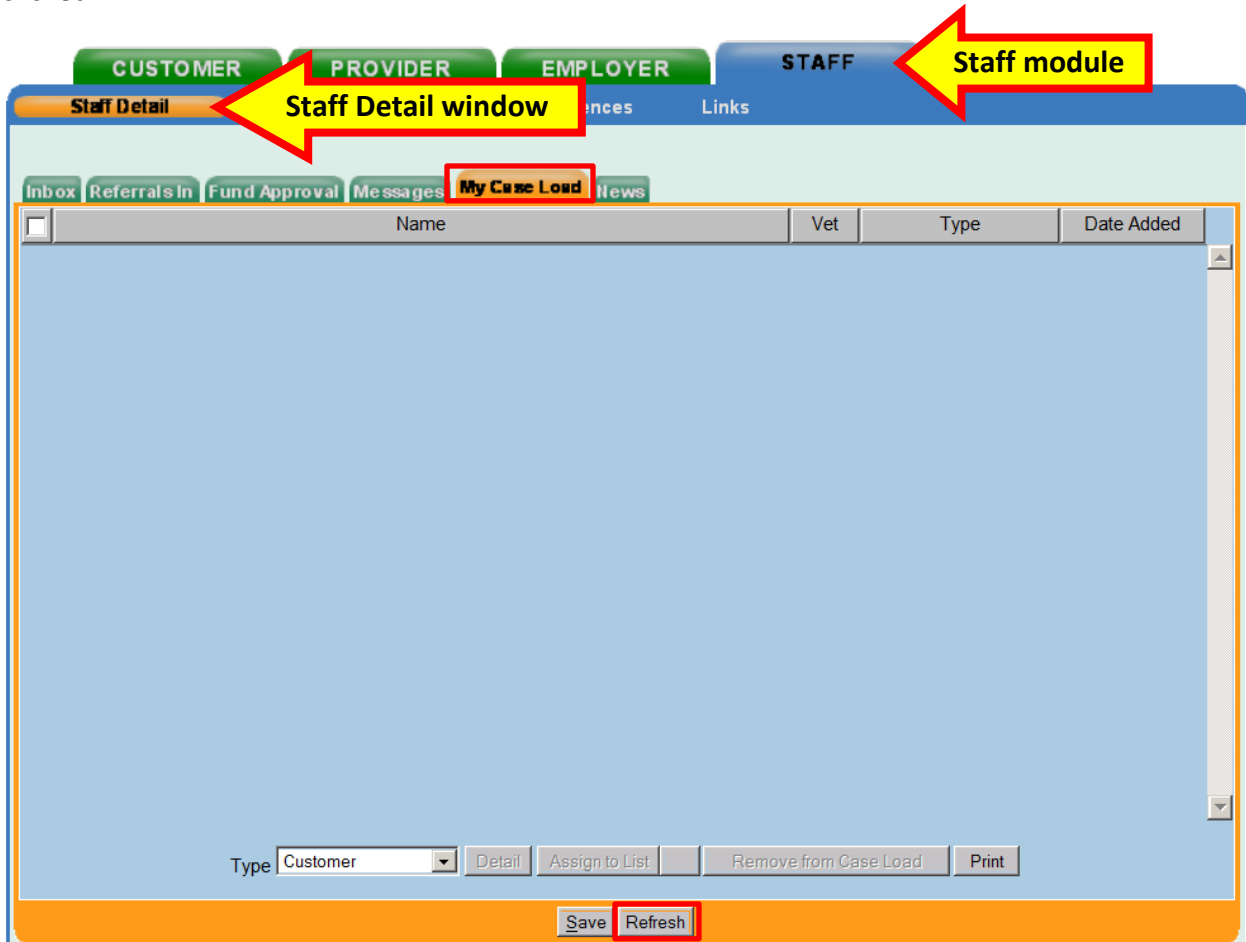


The screenshot displays the OSOS interface for a customer record. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail (selected), Comp Assess, Services, Links, and JobZone. The main header shows the customer name MALINAK, VET and SSN: 0. A yellow arrow points to a 'Record Saved' message in the top right corner. The main content area is divided into several sections:

- Customer Data:** Includes fields for SSN, Status (Active), Job Seeker (Active), Username (malin3615), Password (VM3615), Last Name (MALINAK), First Name (VET), Date of Birth (02/19/1981), Gender (Male), Portfolio Lvl. (JobZone Adult), Address (10 MAIN STREET), City (ALBANY), State (New York), Zip (12206), County (Albany), Country (United States), Metro, Phone (518-555-5555), Email (vet.malinak@yahoo.com), and URL. There is a 'Remove from Case Load' button highlighted with a red box.
- Enrollments:** JZ/CZ Manager
- Customer Assignment:** Staff Assigned (PIACENTE, JASON), WIB Assigned (Columbia/Greene Counties), Agency (Department of Labor), Office (HUDSON), UI Claimant (dropdown), Registered (07/03/2017), Origin (Staff), Profiled, Profiled Date, Internet Resume , Confidential .
- Contact Preferences:** Use Postal , Fax , Pri. Phone , Email , Alt. Phone , Resume Contact Info.

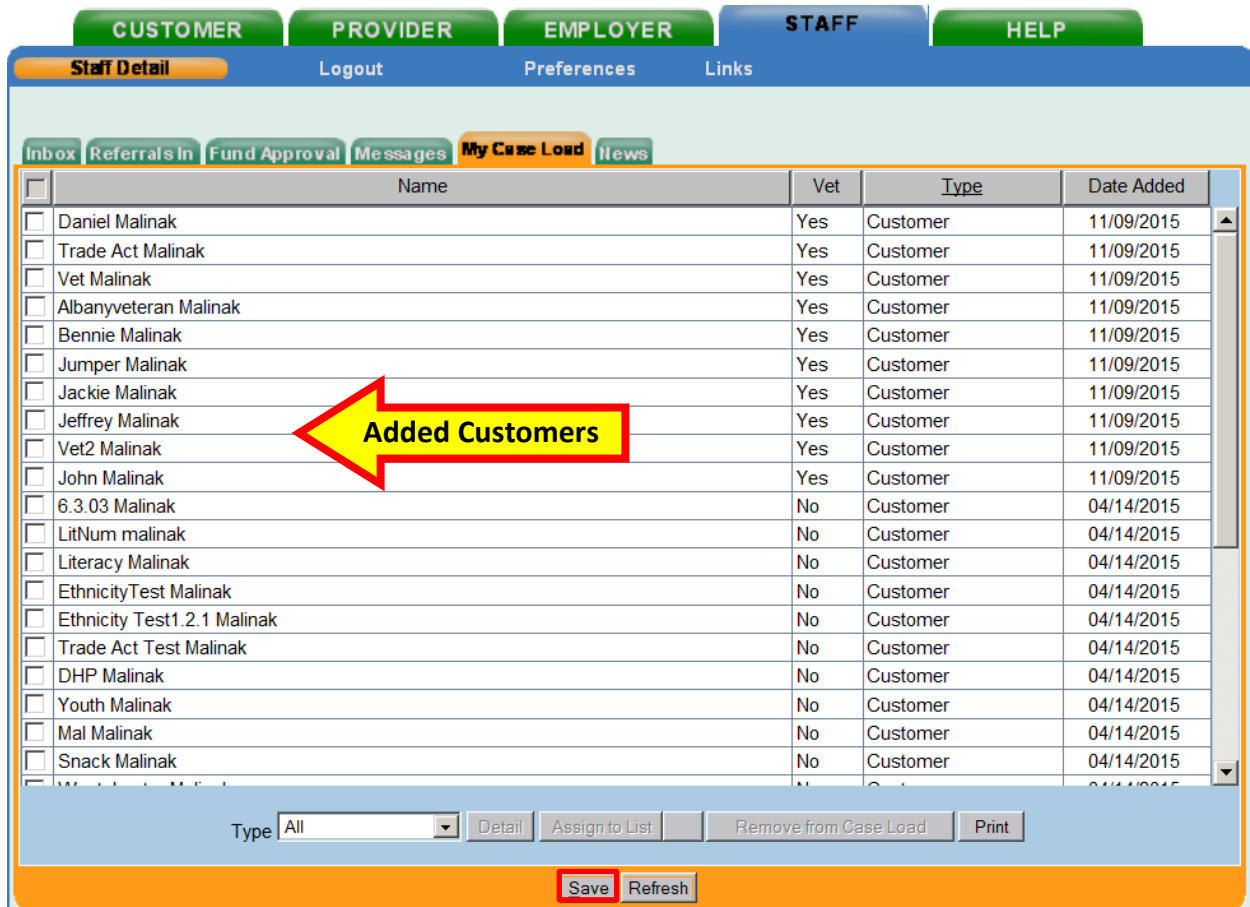
At the bottom, there is a row of buttons: Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, Message.

The added records will not be visible in the **My Case Load** tab until the **Refresh** button is clicked.



Once the **Refresh** button is clicked, the added veteran's name(s) will be visible.

Click the **Save** button when finished.



The screenshot shows the OSOS interface with the 'STAFF' tab selected. The 'My Case Load' sub-tab is active, displaying a table of staff members. A red arrow points to the text 'Added Customers' in the table. At the bottom, the 'Save' button is highlighted with a red box.

<input type="checkbox"/>	Name	Vet	Type	Date Added
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Literacy Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	EthnicityTest Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	DHP Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Snack Malinak	No	Customer	04/14/2015

At the bottom of the table, there is a 'Type' dropdown menu set to 'All', and buttons for 'Detail', 'Assign to List', 'Remove from Case Load', and 'Print'. Below the table, there are 'Save' and 'Refresh' buttons.



ADDING MULTIPLE VETERANS TO MY CASE LOAD

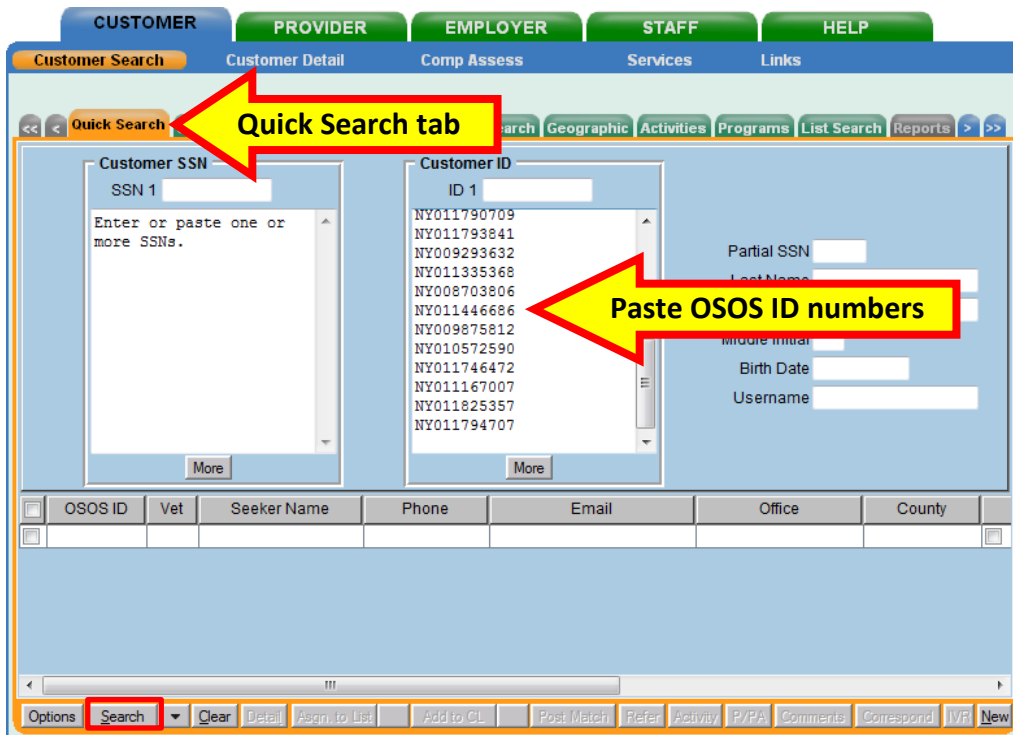
Multiple veterans can be added to a case load at one time. For example, a group of veterans can be added from a list or spreadsheet containing Social Security or OSOS ID numbers.

A maximum of 200 veterans can be pasted and searched in OSOS at one time. If the list is larger than 200, divide it into multiple groups and add each group separately.

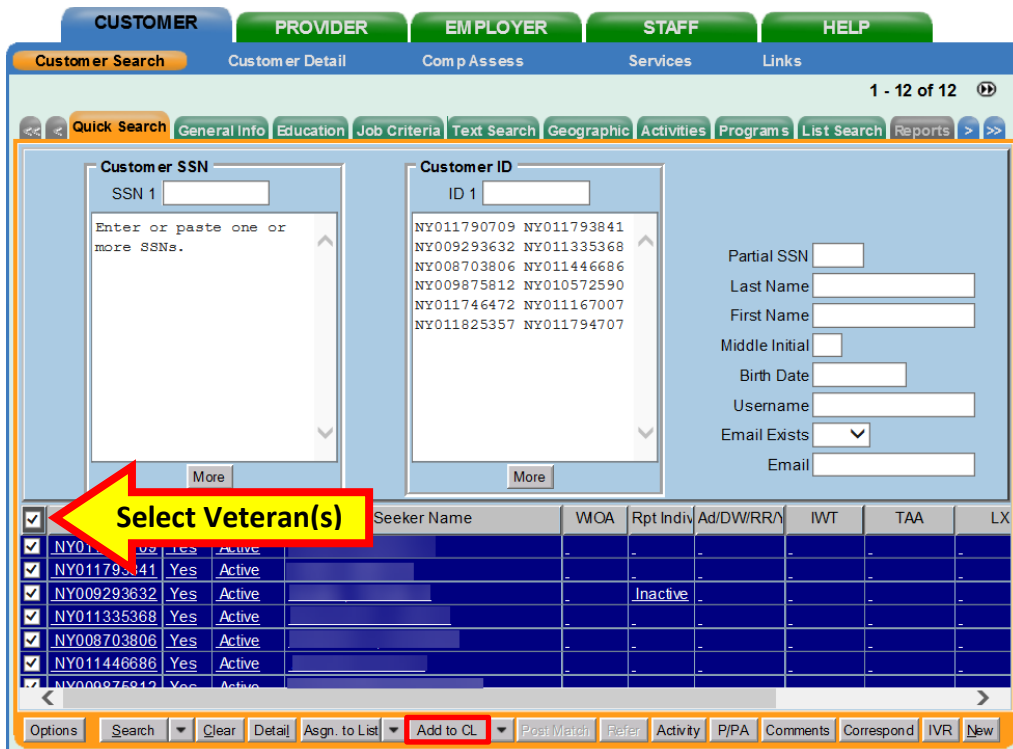
1	Region	WIB	Office	OSOS ID	Last Name	First Name	Last LVER Referral Date
2	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY013062097	LEN	ALFA	8/5/2015
3	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY013062099	BROWN	BRAVO	3/4/2015
4	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011815917	CLARK	CHARLIE	6/17/2015
5	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011760437	DAVIS	DAVID	3/16/2015
6	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011760794	EVANS	EVAN	3/2/2015
7	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011761436	FLORES	FOXTROT	8/24/2015
8	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011761558	GARCIA	GOLF	6/8/2015
9	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011769867	HERNANDEZ	HOTEL	6/29/2015
10	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011775814	JOHNSON	INDIA	5/4/2015
11	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011776471	JONES	JULIETT	7/14/2015
12	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011779470	KIM	KILO	7/14/2015
13	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011785059	LEE	LIMA	4/20/2015
14	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011785650	MILLER	MIKE	5/1/2015
15	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011789747	NGUYEN	NOVEMBER	4/15/2015
16	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011790709	ORTIZ	OSCAR	7/7/2015
17	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011793841	PATEL	PAPA	3/12/2015
18	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY009293632	QUICK	QUEBEC	3/26/2015
19	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011335368	RODRIGUEZ	ROMEO	6/16/2015
20	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY008703806	RUIBES	UNIFORM	7/28/2015
21	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011446686	SASQUEZ	VICTOR	7/7/2015
22	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY009875812	WILLIAMS	WHISKEY	2/24/2015
23	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY010572590	XIONG	X-RAY	5/11/2015
24	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011746472	YOUNG	YANKEE	7/7/2015
25	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011167007	ZIMMER	ZULU	6/2/2015
26	Capital	Albany/Rensselaer/Schenectady	Rensselaer Co Dept Of Employ & Train	NY011825357	TROY	TANGO	3/13/2015
27	Capital	Albany/Rensselaer/Schenectady	Schenectady One Stop - E&T	NY011794707	SCHENECTADY	SIERRA	7/27/2015



Copy and paste the OSOS ID or Social Security numbers into OSOS and click the **Search** button.



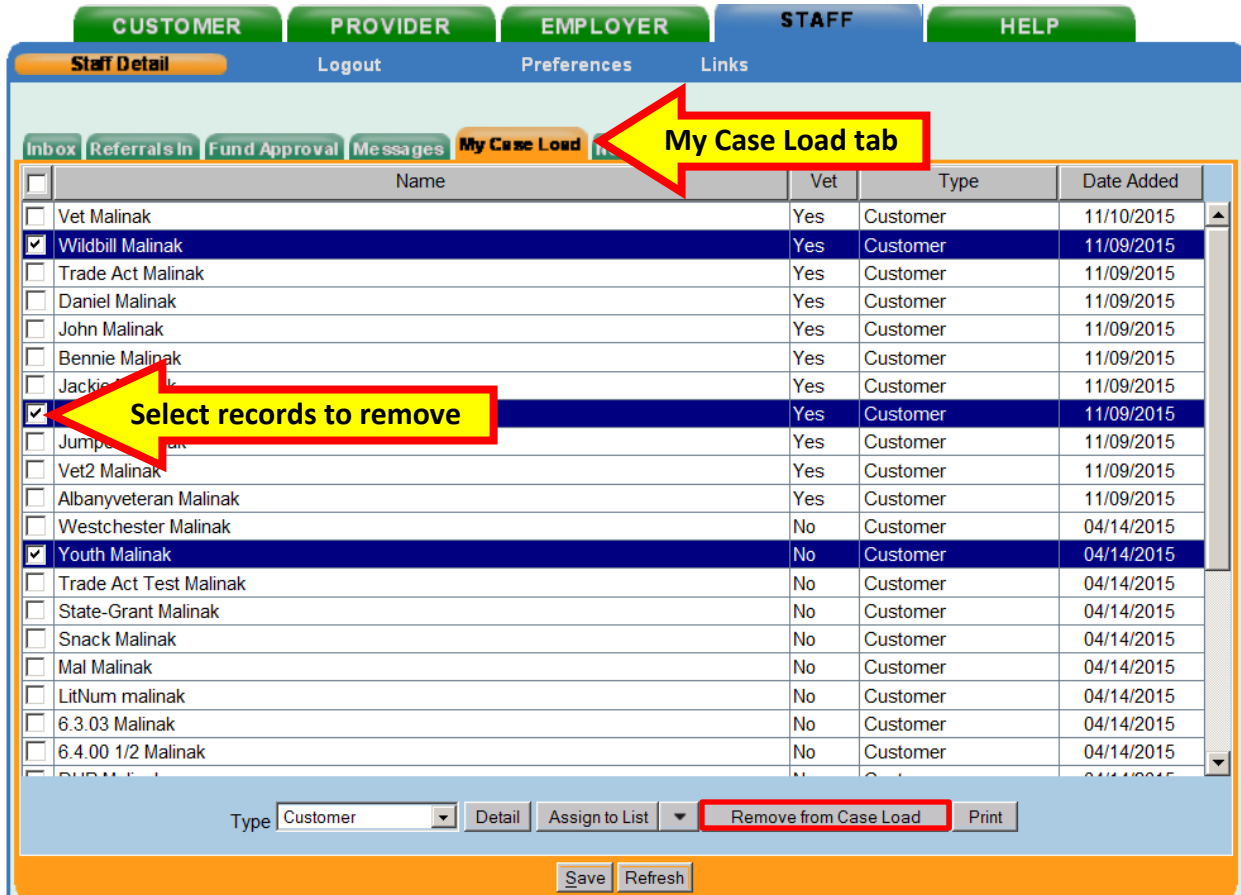
Select the veteran(s) to be added to the case load and click the **Add to CL** button.



REMOVING VETERANS FROM AN EXISTING CASE LOAD

DVOP specialists may remove records from the case load from the **My Case Load** tab or the **General Info** tab within the **Customer Detail** window.

From the **My Case Load** tab, select the record(s) to be removed and click the **Remove from Case Load** button.

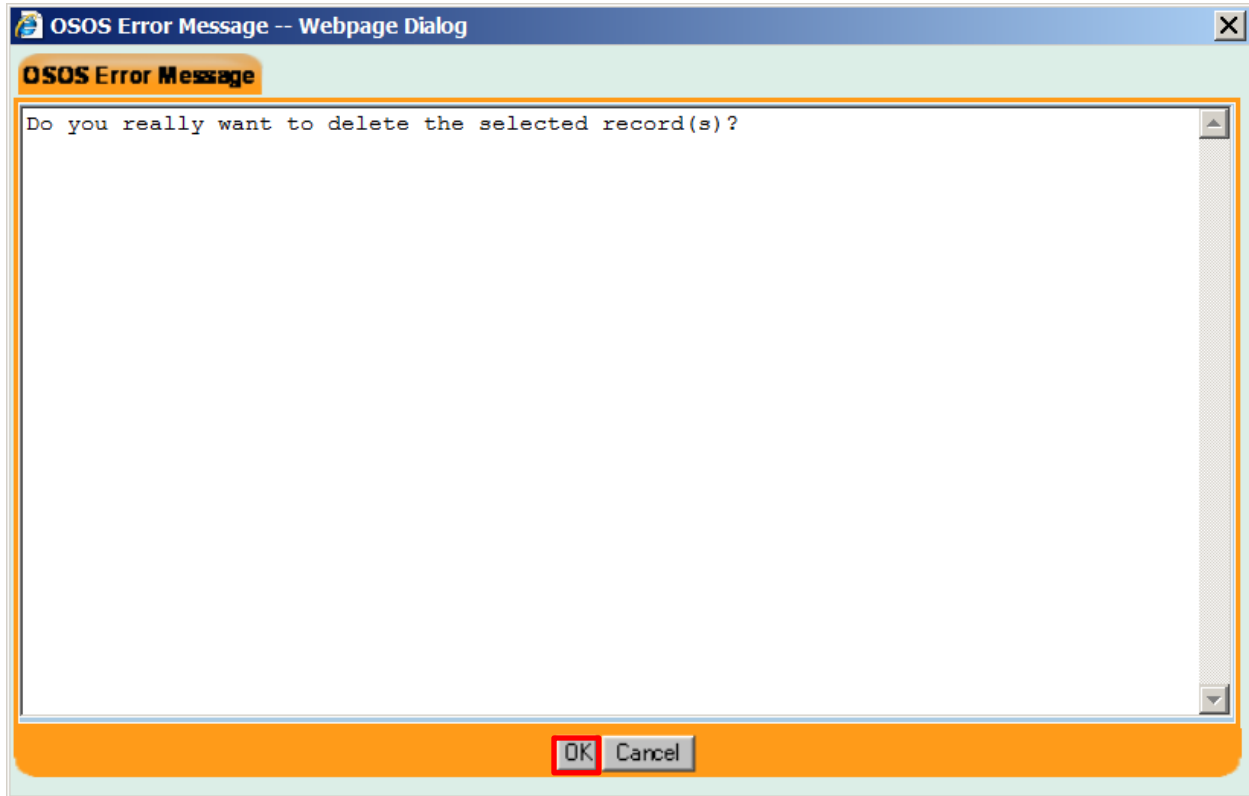


The screenshot shows the OSOS Staff Detail window. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Staff Detail, Logout, Preferences, and Links. The 'My Case Load' tab is selected and highlighted with a yellow arrow pointing to it, labeled 'My Case Load tab'. Below the sub-tabs are navigation buttons: Inbox, Referrals In, Fund Approval, Messages, and My Case Load. The main area contains a table with the following columns: Name, Vet, Type, and Date Added. Several records are listed, with checkboxes in the left margin. Two records, 'Wildbill Malinak' and 'Youth Malinak', have their checkboxes checked. A yellow arrow points to these checked checkboxes, labeled 'Select records to remove'. At the bottom of the window, there is a 'Remove from Case Load' button, which is highlighted with a red box. Other buttons include 'Print', 'Save', and 'Refresh'.

	Name	Vet	Type	Date Added
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/10/2015
<input checked="" type="checkbox"/>	Wildbill Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jackie Malinak	Yes	Customer	11/09/2015
<input checked="" type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	State-Grant Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Snack Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/>	6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	6.4.00 1/2 Malinak	No	Customer	04/14/2015


The **OSOS Error Message - - Webpage Dialog** box will appear requesting confirmation to remove the selected record(s) from the case load.

If the record is to be removed, click the **OK** button.



Click the **Save** button when finished.

Select any veteran or business contact and click the **Detail** button to navigate to the veteran's or business' **General Info** tab.



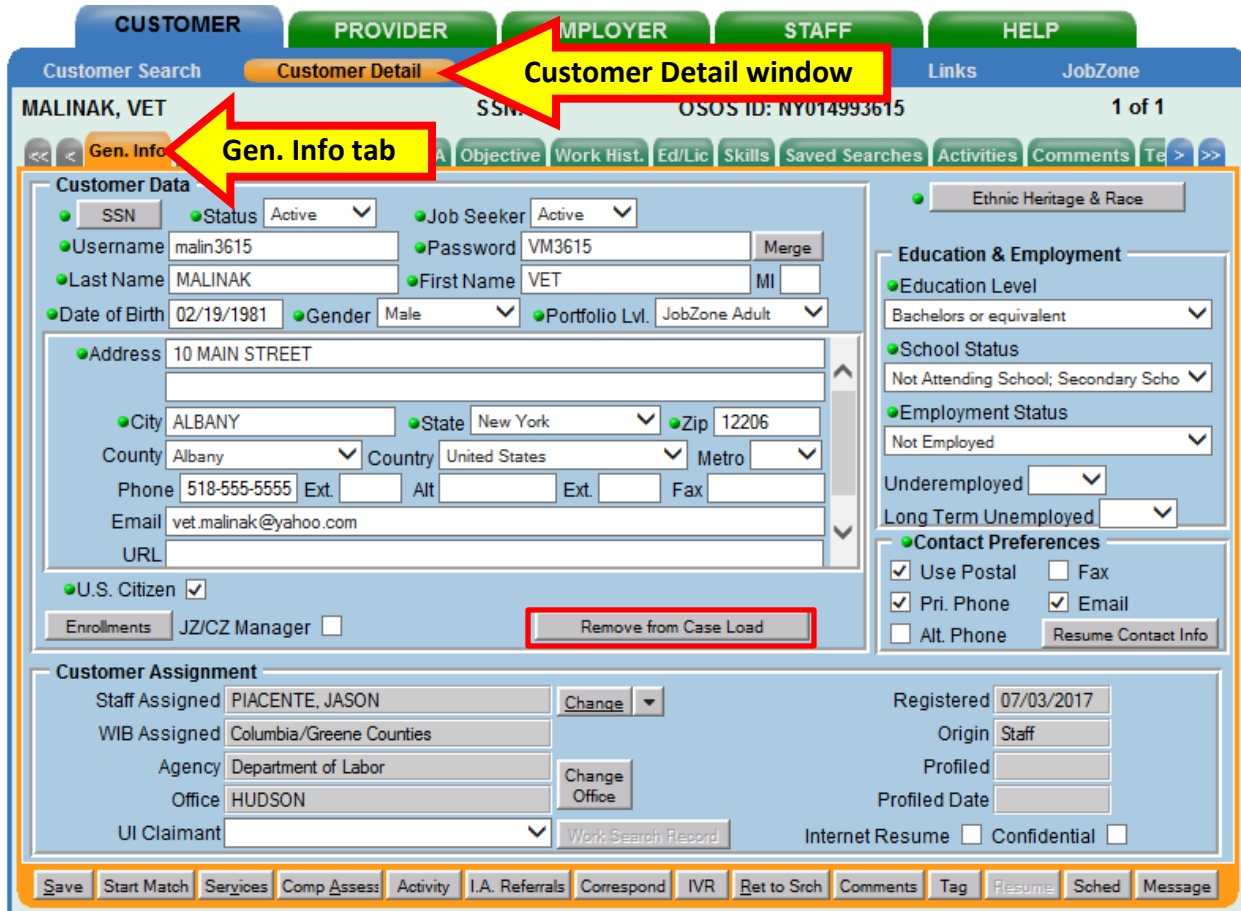
The screenshot shows the OSOS Staff Detail interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are links for Staff Detail, Logout, Preferences, and Links. A secondary set of tabs includes Inbox, Referrals in, Fund Approval, Messages, and My Case Load. A yellow arrow points to the 'My Case Load' tab with the text 'My Case Load tab'. Below the tabs is a table with columns: Name, Vet, Type, and Date Added. The first row, 'Vet Malinak', is selected and highlighted in blue. A yellow arrow points to this row with the text 'Select record'. The table contains the following data:

Name	Vet	Type	Date Added
<input checked="" type="checkbox"/> Vet Malinak	Yes	Customer	11/10/2015
<input type="checkbox"/> Wildbill Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Westchester Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/> State-Grant Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Snack Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/> LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.4.00 1/2 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> SUP M...	No	Customer	04/14/2015

At the bottom of the table, there is a 'Type' dropdown menu set to 'Customer'. A red box highlights the 'Detail' button next to it. Other buttons include 'Assign to List', 'Remove from Case Load', and 'Print'. At the very bottom, there are 'Save' and 'Refresh' buttons.

The **General Info** tab within the **Customer Detail** window has the **Remove from Case Load** button in the middle of the screen. To quickly remove a record from the case load, click the **Remove from Case Load** button.

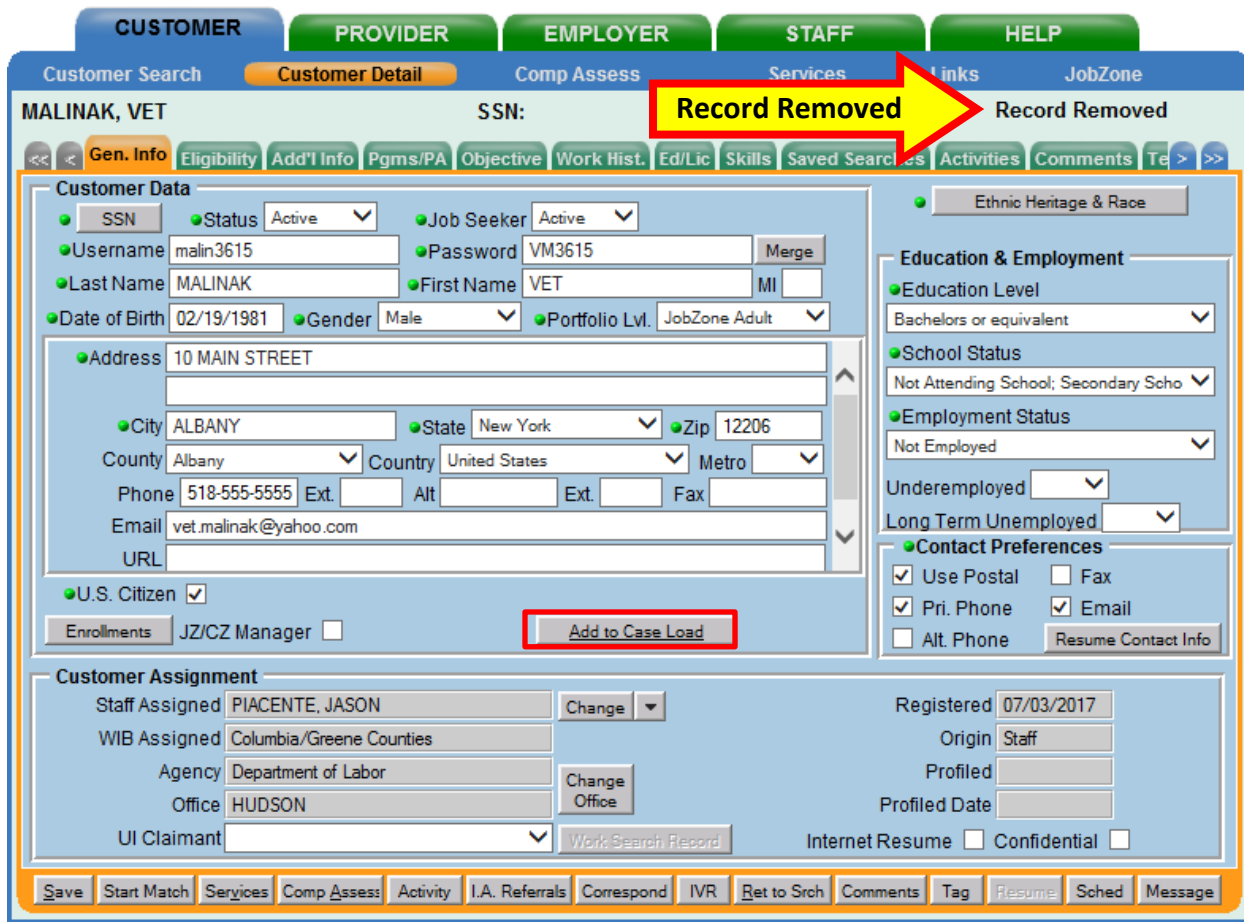
If the veteran is not included in the case load, then the button displays as **Add to Case Load**.



Once the veteran has been removed from the case load, the message “Record Removed” will appear in the top right hand corner and the **Remove from Case Load** button will be replaced with the **Add to Case Load** button.

The availability of the **Add to Case Load** button confirms that the veteran has been removed from the case load.

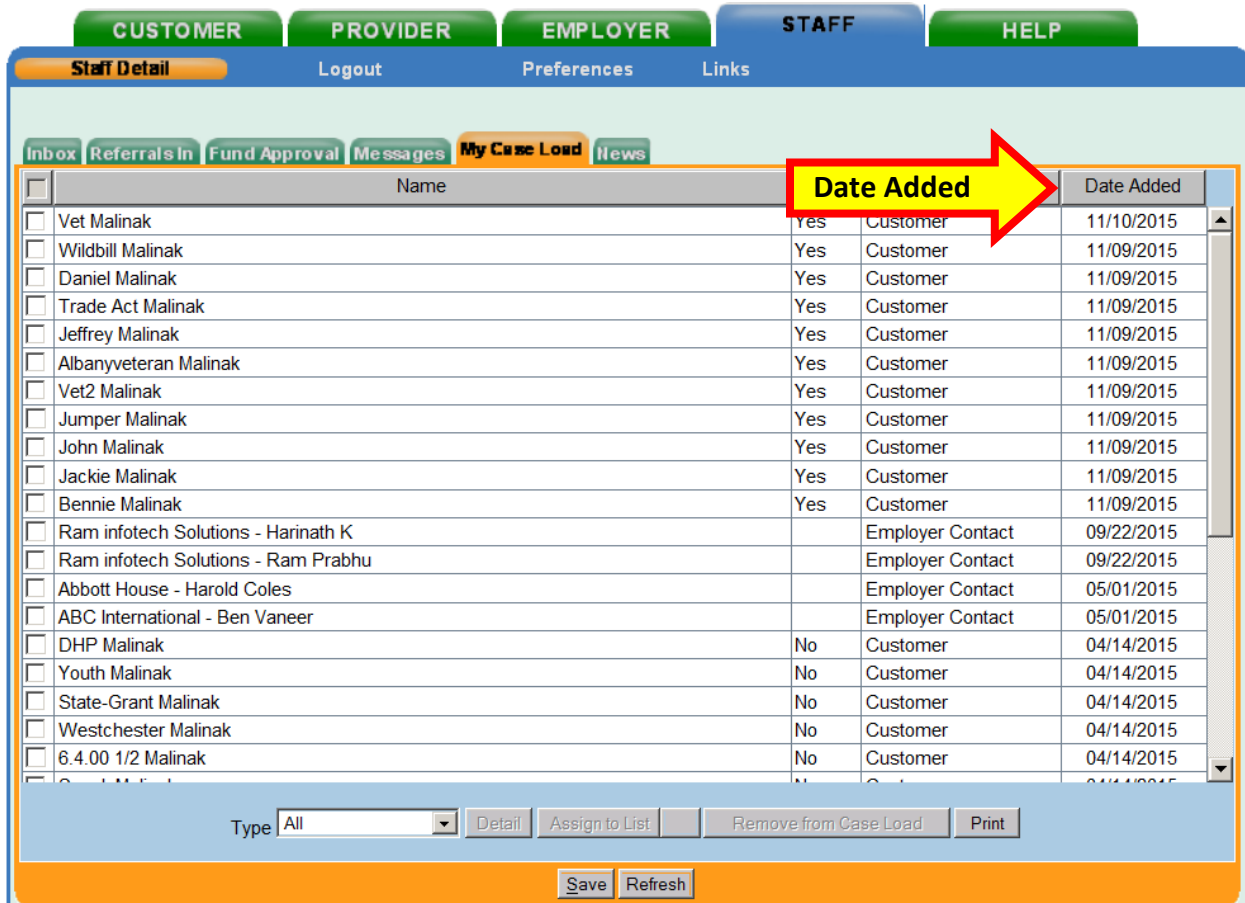
There is no need to save the record.



The screenshot shows the OSOS system interface for a customer named MALINAK, VET. The page is titled "Customer Detail" and includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The customer's SSN is displayed as VM3615. A yellow arrow points to the "Record Removed" message in the top right corner. The "Add to Case Load" button is highlighted with a red box. The "Customer Data" section includes fields for SSN, Status (Active), Job Seeker (Active), Username (malin3615), Password (VM3615), Last Name (MALINAK), First Name (VET), Date of Birth (02/19/1981), Gender (Male), Portfolio Lvl. (JobZone Adult), Address (10 MAIN STREET), City (ALBANY), State (New York), Zip (12206), County (Albany), Country (United States), Metro, Phone (518-555-5555), Email (vet.malinak@yahoo.com), and U.S. Citizen (checked). The "Customer Assignment" section shows Staff Assigned (PIACENTE, JASON), WIB Assigned (Columbia/Greene Counties), Agency (Department of Labor), Office (HUDSON), and UI Claimant. The "Add to Case Load" button is located at the bottom of the "Customer Data" section.

SORTING MY CASE LOAD

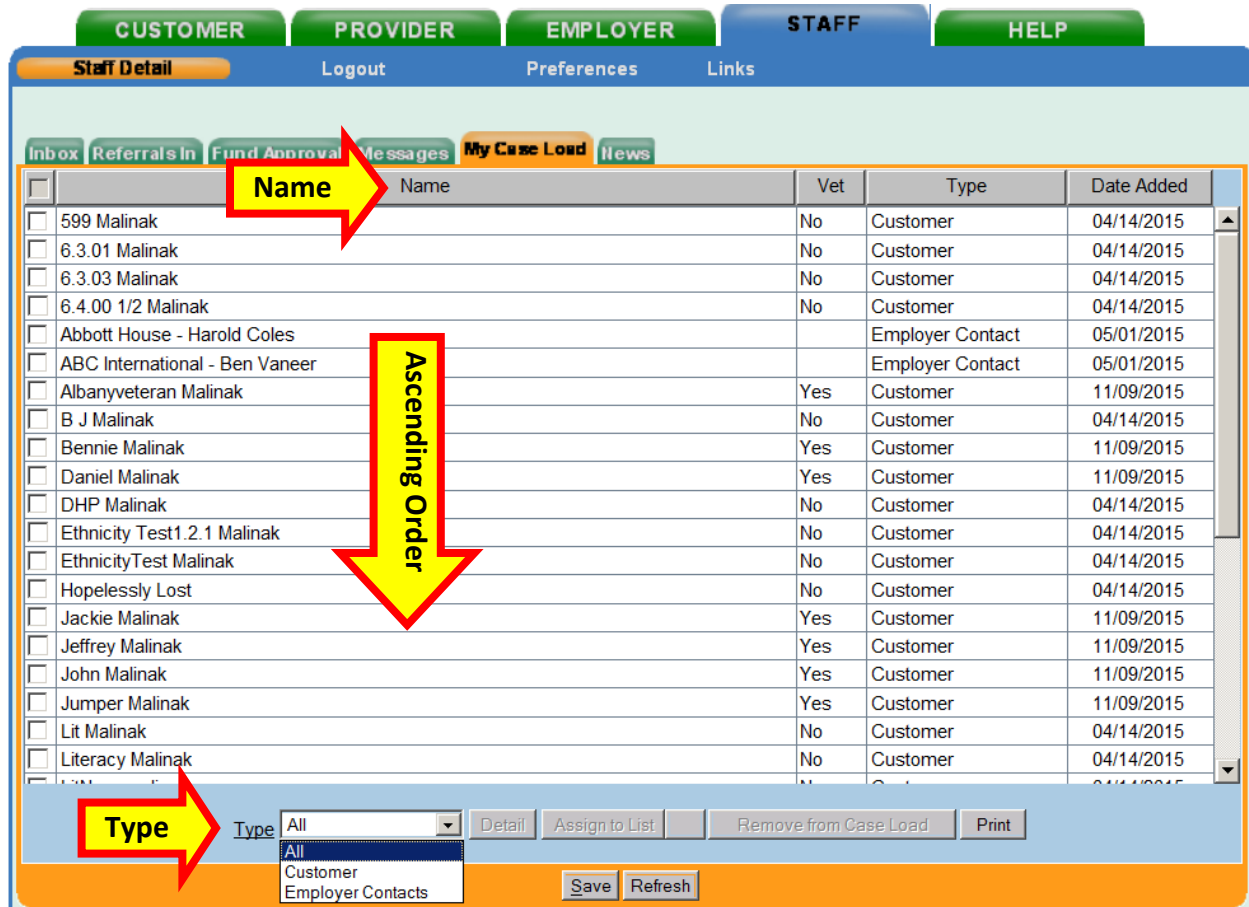
The **My Case Load** tab is automatically sorted by the **Date Added** column.



The screenshot shows the 'My Case Load' tab in the OSOS interface. The interface includes navigation tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Staff Detail, Logout, Preferences, and Links. The main content area has tabs for Inbox, Referrals in, Fund Approval, Messages, My Case Load (selected), and News. A table lists cases with columns for Name, a checkbox, a status column (Yes/No), a role column (Customer/Employer Contact), and Date Added. A yellow arrow points to the 'Date Added' header. At the bottom, there are controls for Type (All), Detail, Assign to List, Remove from Case Load, Print, Save, and Refresh.

<input type="checkbox"/>	Name			Date Added
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/10/2015
<input type="checkbox"/>	Wildbill Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Ram infotech Solutions - Harinath K		Employer Contact	09/22/2015
<input type="checkbox"/>	Ram infotech Solutions - Ram Prabhu		Employer Contact	09/22/2015
<input type="checkbox"/>	Abbott House - Harold Coles		Employer Contact	05/01/2015
<input type="checkbox"/>	ABC International - Ben Vaneer		Employer Contact	05/01/2015
<input type="checkbox"/>	DHP Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	State-Grant Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Westchester Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	6.4.00 1/2 Malinak	No	Customer	04/14/2015

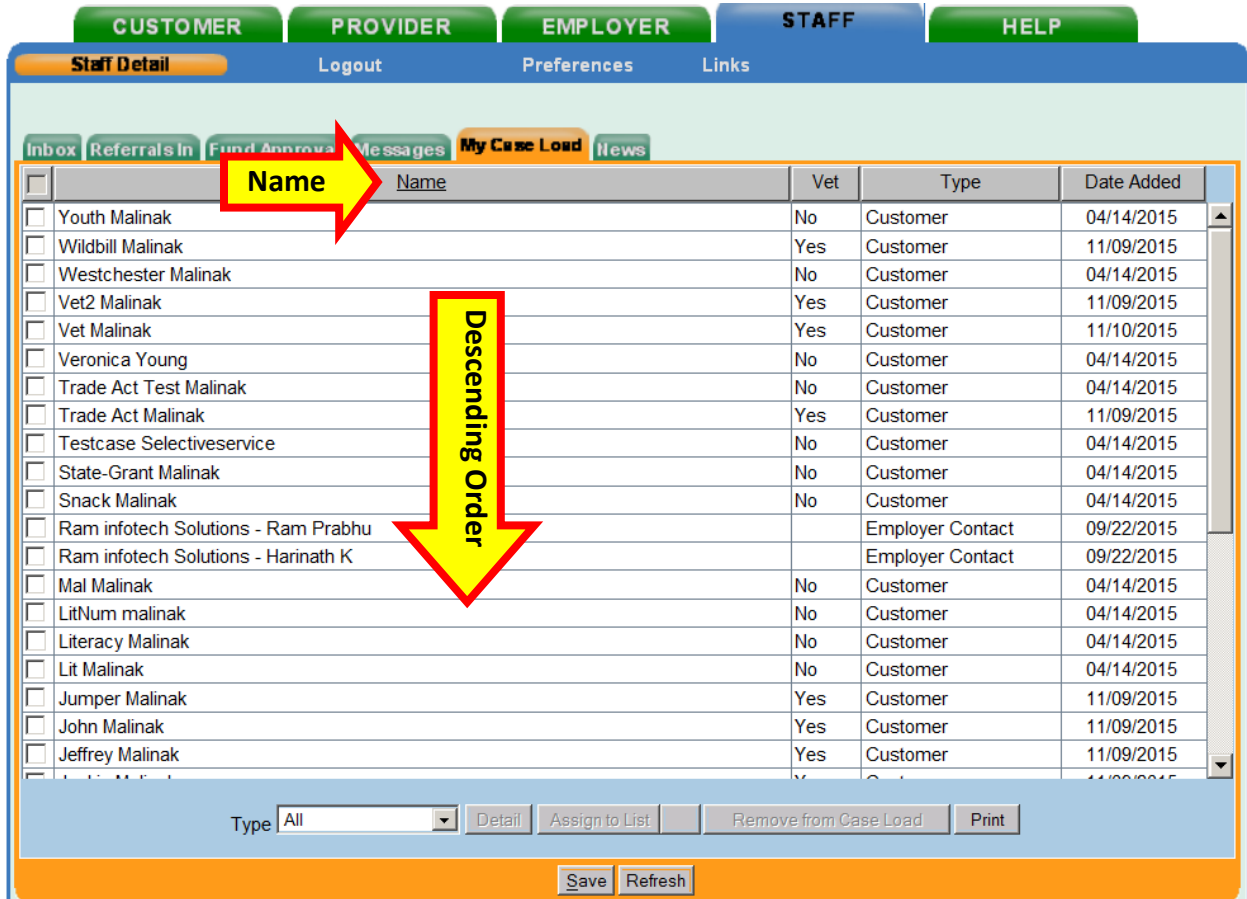
The information can be sorted by the headings listed. Clicking on any column header will sort the information. In the example below, the **Name** column was clicked and the information was sorted by the first name in ascending order. Because **All** was selected as the **Type**, the example displays both veterans and business contacts.



The screenshot shows the OSOS interface with the 'STAFF' tab selected. The 'My Case Load' sub-tab is active, displaying a table of staff members. The table is sorted by the 'Name' column in ascending order. The 'Type' dropdown menu is open, showing 'All' selected. The table contains the following data:

<input type="checkbox"/>	Name	Vet	Type	Date Added
<input type="checkbox"/>	599 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	6.3.01 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	6.4.00 1/2 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Abbott House - Harold Coles		Employer Contact	05/01/2015
<input type="checkbox"/>	ABC International - Ben Vaneer		Employer Contact	05/01/2015
<input type="checkbox"/>	Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	B J Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	DHP Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	EthnicityTest Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Hopelessly Lost	No	Customer	04/14/2015
<input type="checkbox"/>	Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Lit Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Literacy Malinak	No	Customer	04/14/2015

Clicking the **Name** column a second time will reverse the sorting so that it appears in descending order.



The screenshot shows the 'Staff Detail' page with the 'My Case Load' tab selected. The table below lists staff members sorted by Name in descending order. Annotations include a yellow arrow pointing to the 'Name' header and a vertical yellow arrow pointing downwards labeled 'Descending Order'.

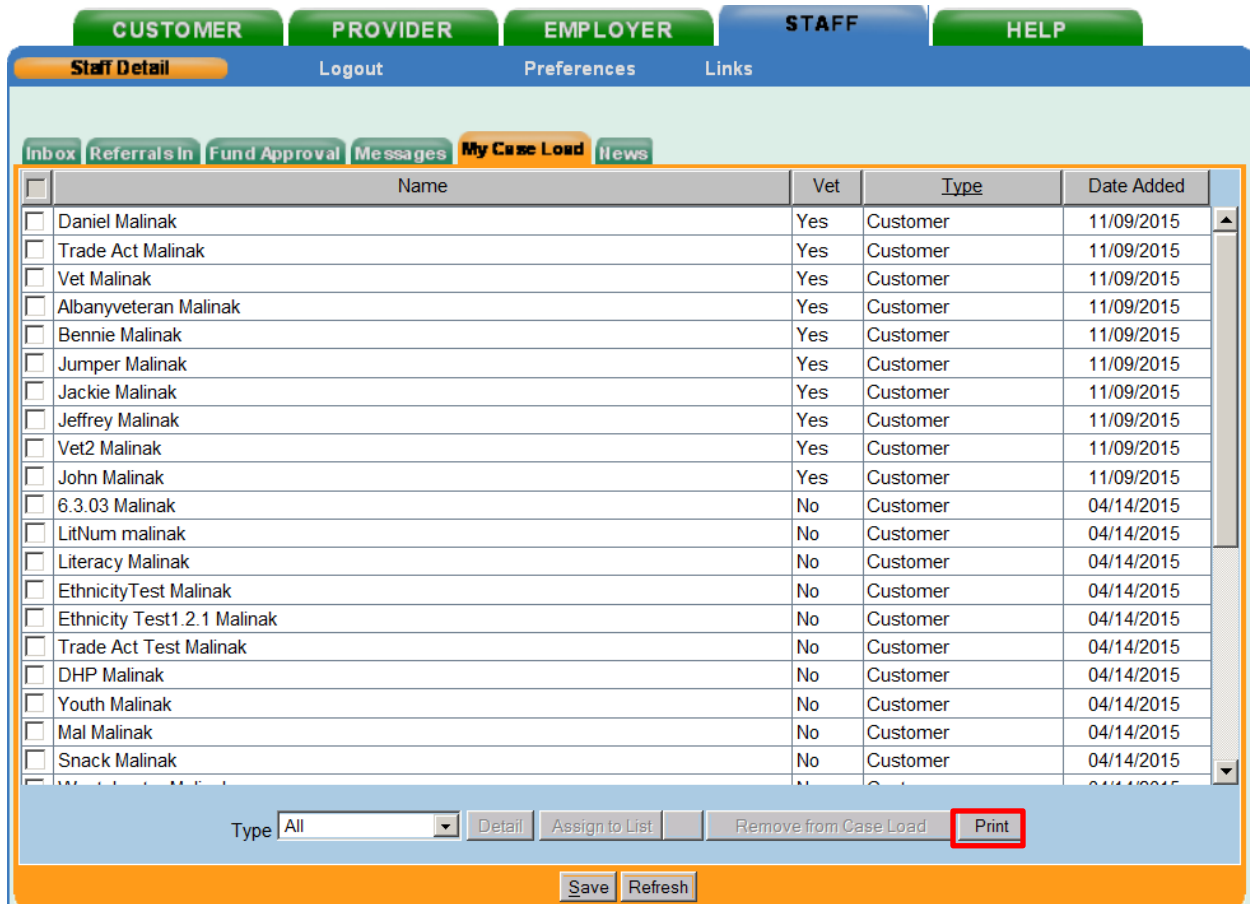
<input type="checkbox"/>	Name	Vet	Type	Date Added
<input type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Wildbill Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Westchester Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/10/2015
<input type="checkbox"/>	Veronica Young	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Testcase Selectiveservice	No	Customer	04/14/2015
<input type="checkbox"/>	State-Grant Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Snack Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Ram infotech Solutions - Ram Prabhu		Employer Contact	09/22/2015
<input type="checkbox"/>	Ram infotech Solutions - Harinath K		Employer Contact	09/22/2015
<input type="checkbox"/>	Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Literacy Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Lit Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015

At the bottom of the page, there is a 'Type' dropdown menu set to 'All', and buttons for 'Detail', 'Assign to List', 'Remove from Case Load', 'Print', 'Save', and 'Refresh'.

PRINTING AND EXPORTING MY CASE LOAD LIST

From the **My Case Load** tab, click the **Print** button to either print or export the case load.

Only the four visible columns from **My Case Load** will print or export to the Excel spreadsheet.



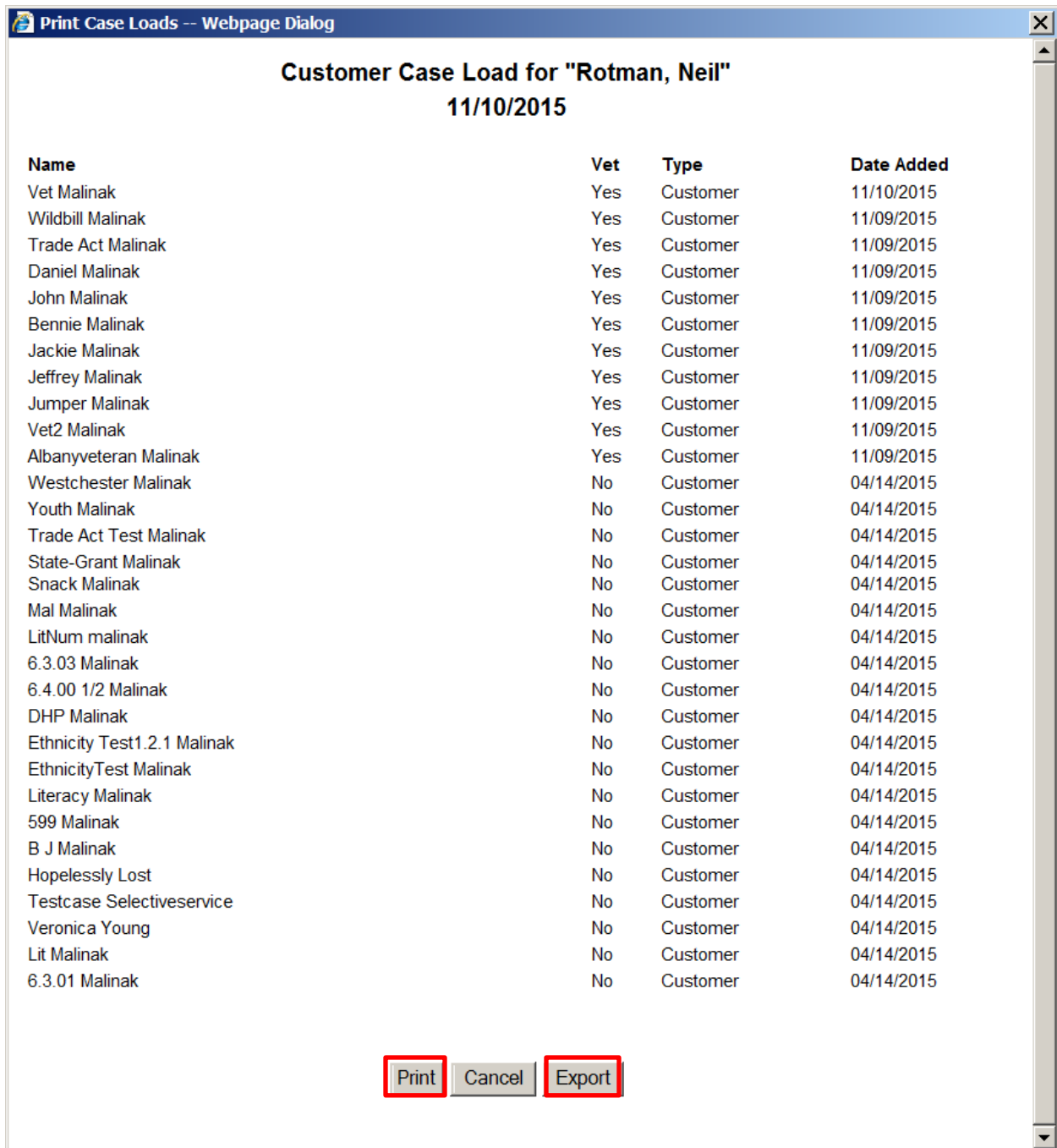
The screenshot shows the OSOS interface with the 'STAFF' tab selected. The 'My Case Load' sub-tab is active, displaying a table of cases. The table has columns for Name, Vet, Type, and Date Added. A 'Print' button is highlighted with a red box at the bottom of the interface.

<input type="checkbox"/>	Name	Vet	Type	Date Added
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Literacy Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	EthnicityTest Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	DHP Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Snack Malinak	No	Customer	04/14/2015

Interface controls at the bottom include a 'Type' dropdown set to 'All', buttons for 'Detail', 'Assign to List', 'Remove from Case Load', and a highlighted 'Print' button. Below these are 'Save' and 'Refresh' buttons.

To print, click the **Print** button.

To export, click the **Export** button.



Print Case Loads -- Webpage Dialog

Customer Case Load for "Rotman, Neil"
11/10/2015

Name	Vet	Type	Date Added
Vet Malinak	Yes	Customer	11/10/2015
Wildbill Malinak	Yes	Customer	11/09/2015
Trade Act Malinak	Yes	Customer	11/09/2015
Daniel Malinak	Yes	Customer	11/09/2015
John Malinak	Yes	Customer	11/09/2015
Bennie Malinak	Yes	Customer	11/09/2015
Jackie Malinak	Yes	Customer	11/09/2015
Jeffrey Malinak	Yes	Customer	11/09/2015
Jumper Malinak	Yes	Customer	11/09/2015
Vet2 Malinak	Yes	Customer	11/09/2015
Albanyveteran Malinak	Yes	Customer	11/09/2015
Westchester Malinak	No	Customer	04/14/2015
Youth Malinak	No	Customer	04/14/2015
Trade Act Test Malinak	No	Customer	04/14/2015
State-Grant Malinak	No	Customer	04/14/2015
Snack Malinak	No	Customer	04/14/2015
Mal Malinak	No	Customer	04/14/2015
LitNum malinak	No	Customer	04/14/2015
6.3.03 Malinak	No	Customer	04/14/2015
6.4.00 1/2 Malinak	No	Customer	04/14/2015
DHP Malinak	No	Customer	04/14/2015
Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
EthnicityTest Malinak	No	Customer	04/14/2015
Literacy Malinak	No	Customer	04/14/2015
599 Malinak	No	Customer	04/14/2015
B J Malinak	No	Customer	04/14/2015
Hopelessly Lost	No	Customer	04/14/2015
Testcase Selectiveservice	No	Customer	04/14/2015
Veronica Young	No	Customer	04/14/2015
Lit Malinak	No	Customer	04/14/2015
6.3.01 Malinak	No	Customer	04/14/2015

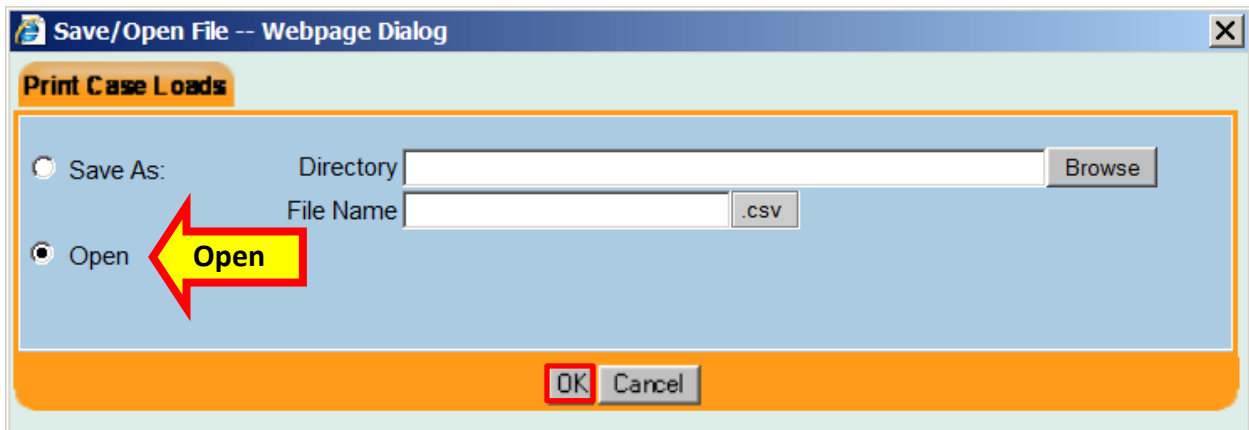
Print **Cancel** **Export**

When printing, the **Print** pop-up will appear. Select the desired options and click the **Print** button.

The **Export** button will navigate the user to the **Save/Open File -- Webpage Dialog** box. When exporting, there are two options:

1. Save As
2. Open

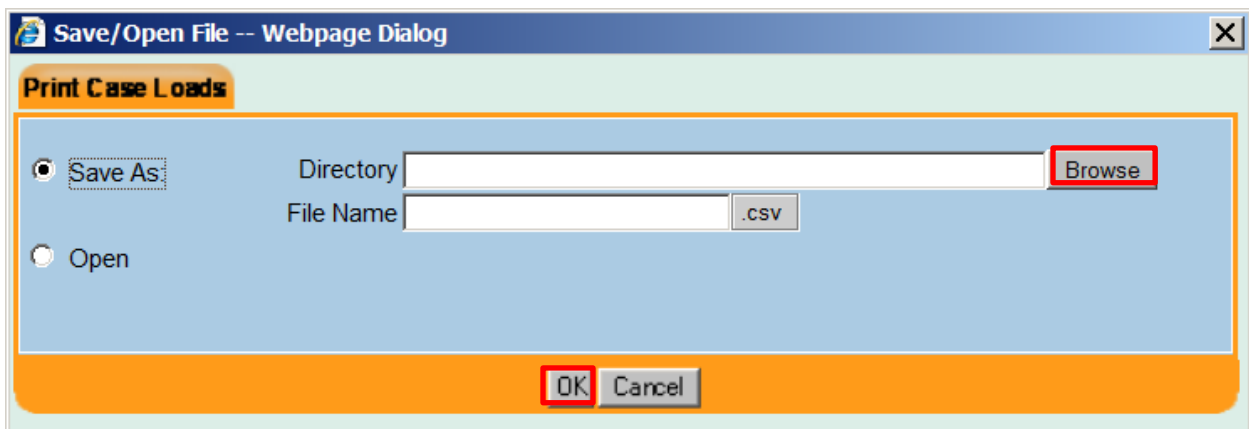
Selecting **Open** and clicking the **OK** button will immediately open the case load in an Excel spreadsheet. Once the Excel spreadsheet is open, it may be saved to the desktop or any preferred folder.



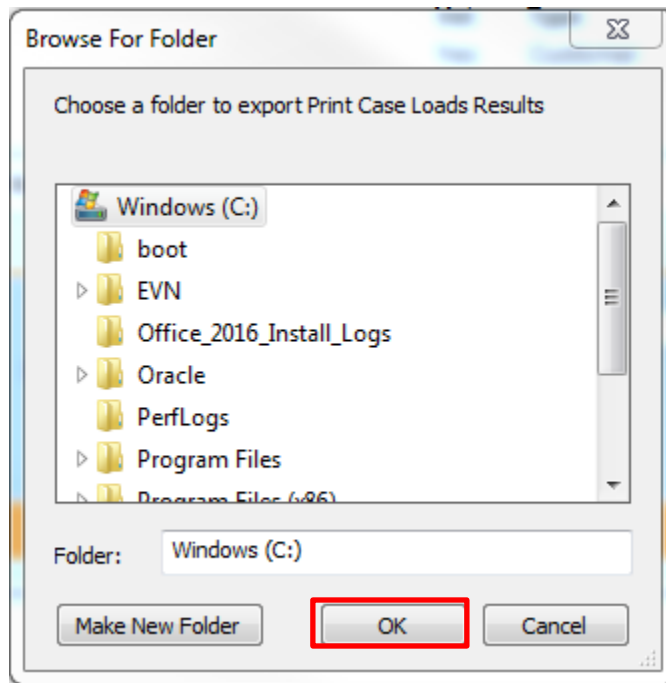
Selecting **Save As** requires the entry of a **Directory** and **File Name**.

If the **Directory** is known, it may be keyed into the data field.

If the **Directory** is unknown, click the **Browse** button:

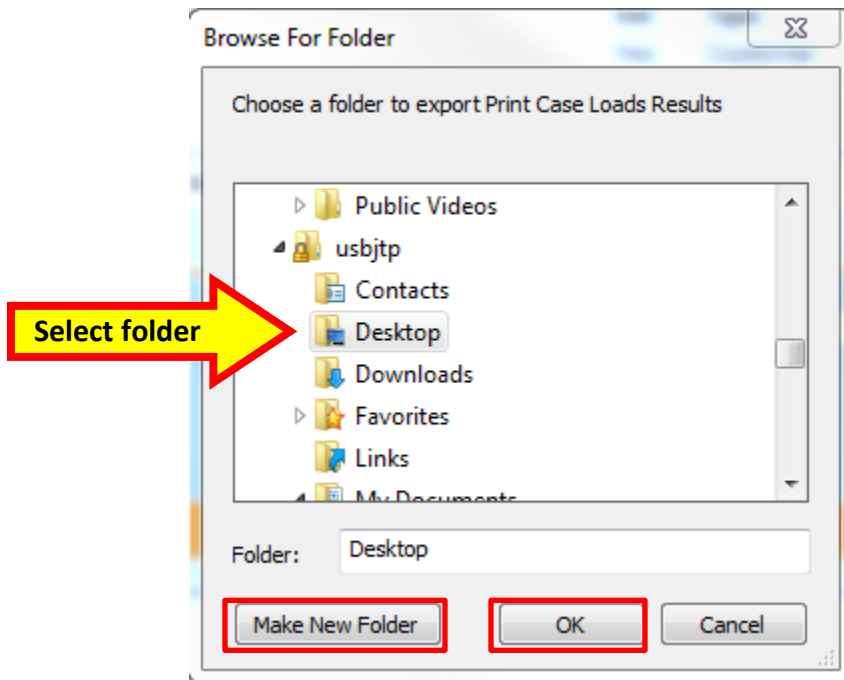


The **Browse For Folder** pop-up will appear

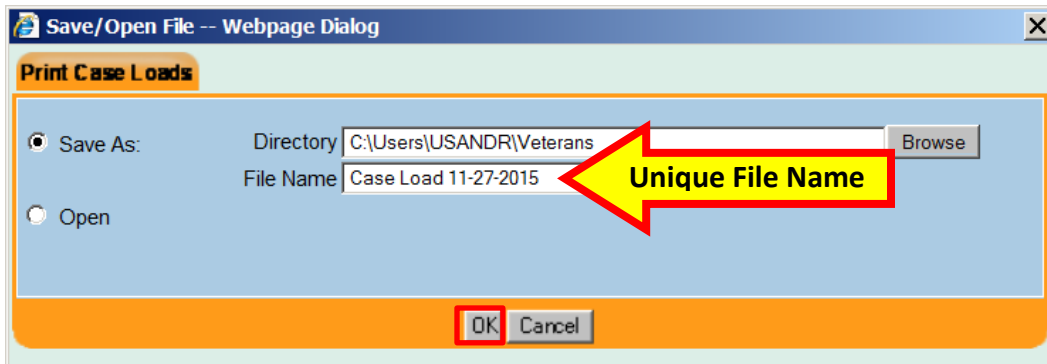


Scroll through the folders and select the preferred folder or create a new folder.

Click the **OK** button.

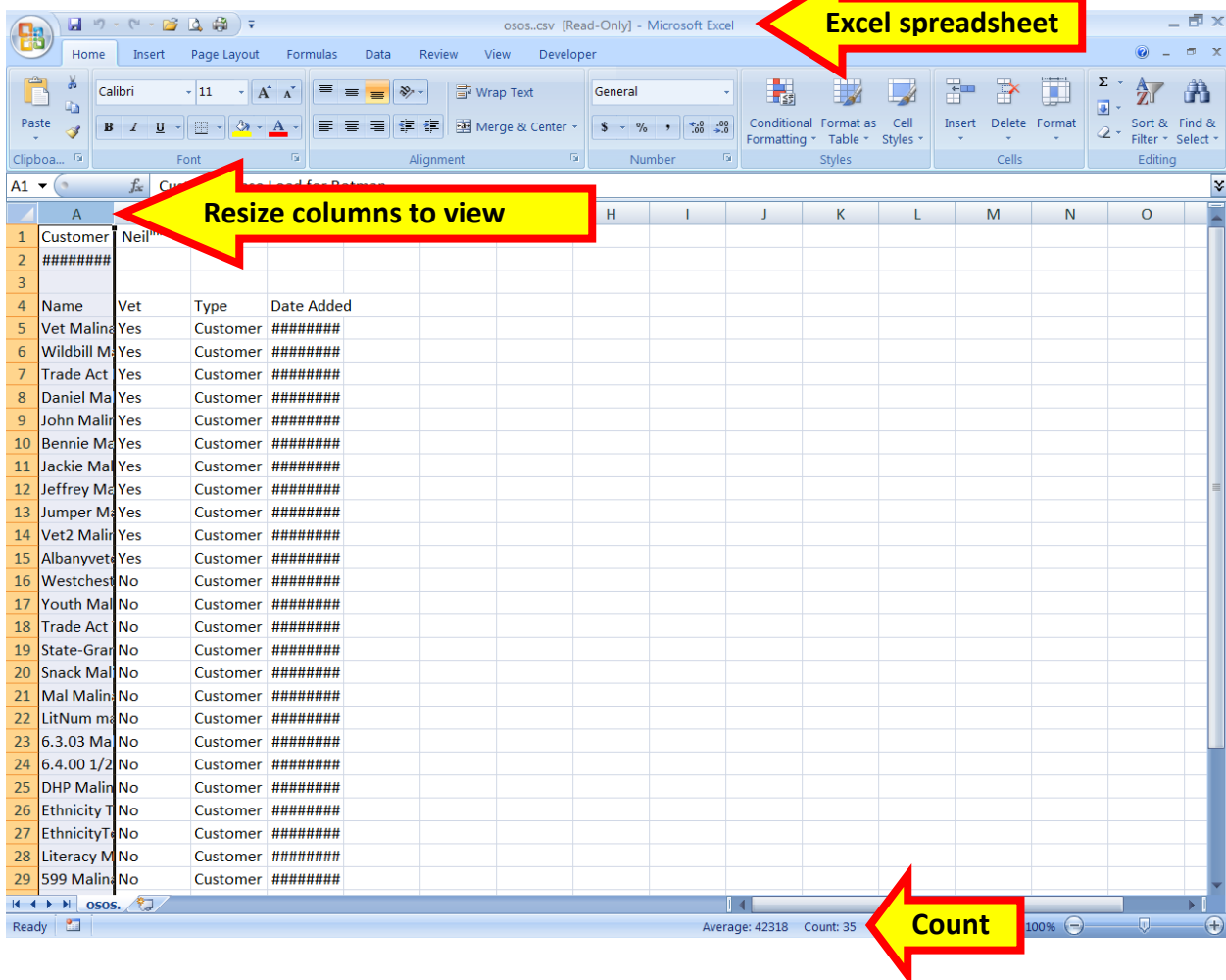


Enter a unique name for the file and click the **OK** button:



After clicking the **OK** button, the file will not automatically open. It is necessary to open Excel and select the spreadsheet from the folder.

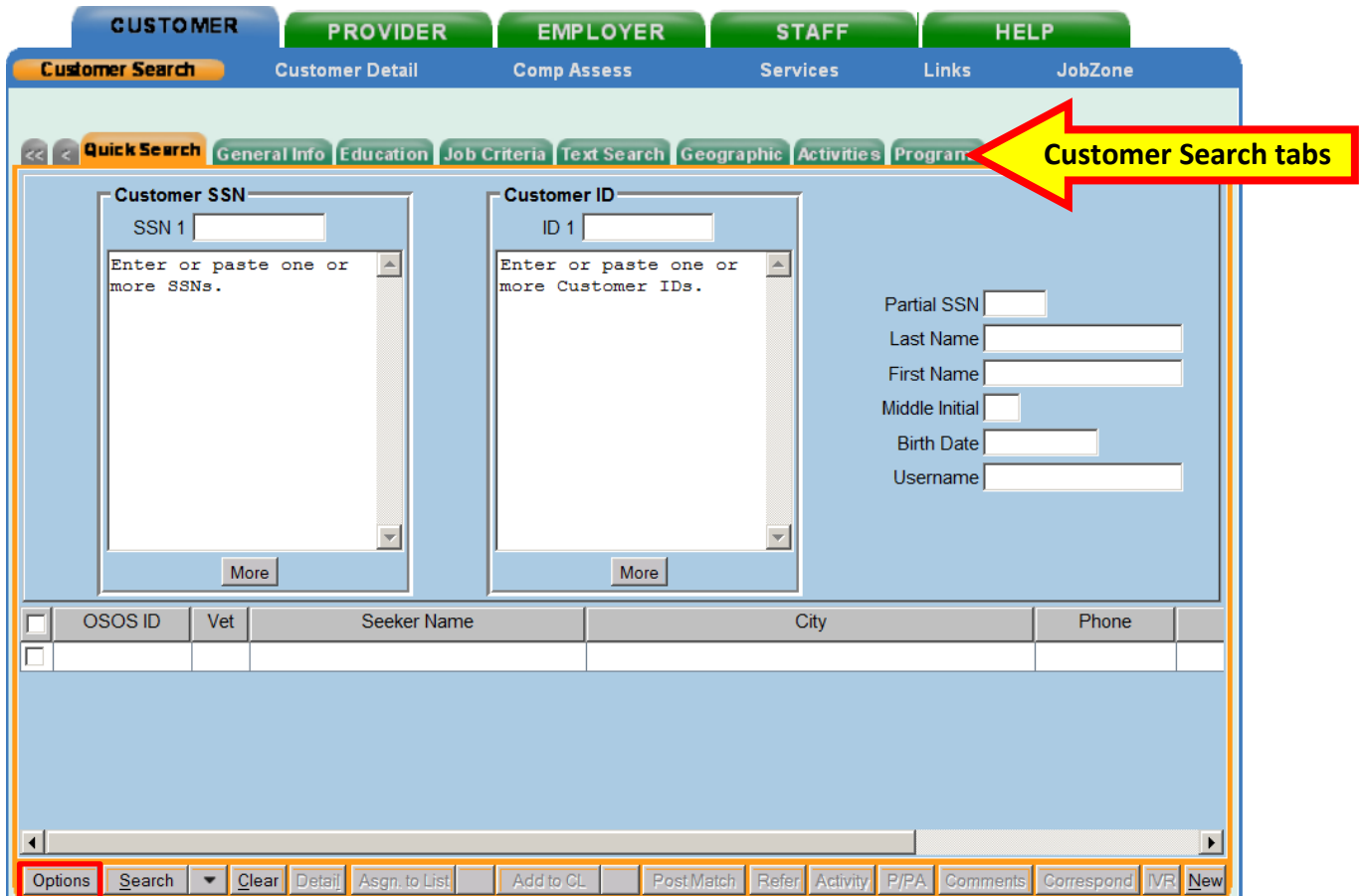
The columns will need to be resized to view the data. The **Count** at the bottom of the spreadsheet provides the number of individuals in the case load.



CUSTOMIZING THE EXPORTED MY CASE LOAD EXCEL FILE

If additional information is desired, such as the city where the veteran resides, telephone number, or email address, run a search and include **My Case Load** in the **Customer Search** criteria.

To begin searching for specific veterans, first click the **Options** button at the bottom of any **Customer Search** tab to access the **Customer Search Result Columns - - Webpage Dialog** box.



The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The Customer Search sub-tab is active, showing search criteria for Customer SSN and Customer ID. A yellow arrow points to the search tabs at the top right, labeled "Customer Search tabs". At the bottom left, the "Options" button is highlighted with a red box. The interface also includes a table with columns for OSOS ID, Vet, Seeker Name, City, and Phone, and a row of action buttons at the bottom: Options, Search, Clear, Detail, Asgn. to List, Add to CL, Post/Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.



Select the information for the spreadsheet by checking the box next to the desired data.

Select a number to designate the order in which the information should appear.

These preferences may be saved for future searches by checking the box next to **Set as My Defaults** and clicking the **Save** button.

As the information and order are selected, it will appear in the column header.

Customer Search Result Columns -- Webpage Dialog

Result Columns **Sort Options**

--Customer Identification--

- OSOS ID 1
- SSN
- Username
- Seeker Name 3
- Last Name
- First Name
- MI
- Vet 2
- SSN Not Provided
- Status 7
- Gender
- Date of Birth

--Program Enrollments--

- Pgm CMSA
- Pgm CMSS
- Pgm WIA
- Pgm WSIO
- Pgm TAA
- Pgm LX
- Pgm SSY
- Pgm SSP

--Contact Information--

- Address 1
- Address 2
- City 4
- State
- ZIP Code
- County
- Country
- Metro
- Phone 5
- Ext.
- Alt. Phone
- Alt. Ext.
- Fax
- Email 6
- URL
- Alt URL
- Third URL

--Education / Employment--

- Education Level
- School Status
- Employment Status

--Customer Assignment--

- Registered
- Modify Time
- Origin
- Origination Method
- UI Claimant
- Profiled
- Profiled Date
- Internet Resume
- Confidential

--Military / Selective Service--

- Service Veteran
- Vet Status
- Veteran Era
- Current Housing
- Current Housing (2)
- Service Disability
- Campaign Veteran
- In Country
- Type
- Branch
- Selective Service?
- Selective Service #

--Employment Objective--

- Empl. Objective
- Desired Job Title
- Add'l Skills Text

--Drivers License--

- Driver Flag
- License Class
- License State
- Air Brakes
- School Bus
- Motorcycle
- Doubles/Triples
- Haz. Materials
- Pass Transport
- Tank Vehicle
- Tank Hazard

--Contact Preferences--

- Use Postal
- Pri. Phone
- Alt. Phone
- Fax
- Email

--Citizenship--

- U.S. Citizen
- Alien Reg #
- Permanent

--Employment Preferences--

- Work Week
- Duration
- Salary
- Pay Unit
- Norm. Salary
- Date Available
- First Shift
- Second Shift

--Programs--

- Lower Living Flag
- Income 70% LLSIL
- Local Priority
- Disability Status
- Disability Category
- Migrant / Seas Wkr
- Migrant Class
- Empl. in Farmwork

Column Header

OSOS ID	Vet	Seeker Name	City
---------	-----	-------------	------

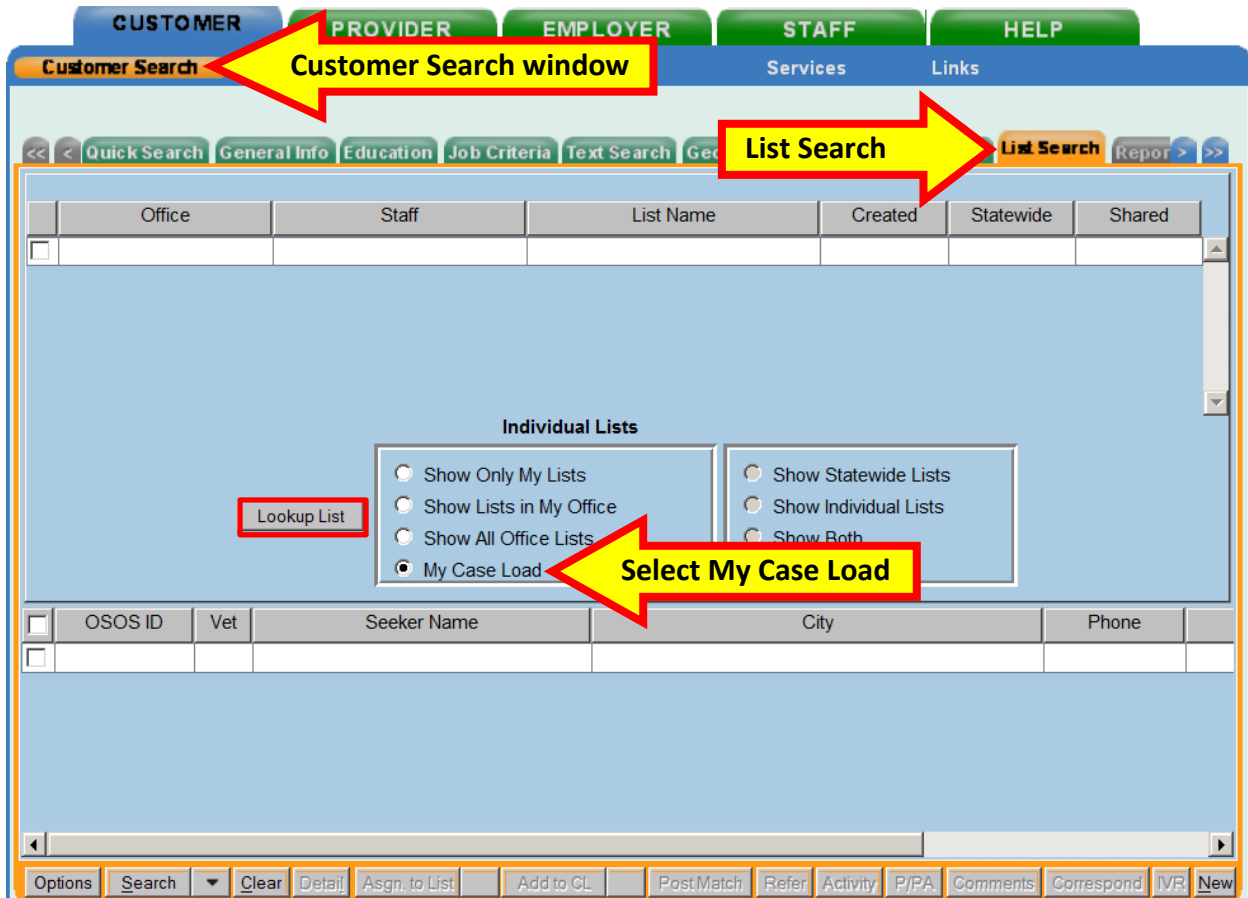
Set as My Defaults

Set as My Defaults **Save** Cancel Show My Defaults Show System Defaults

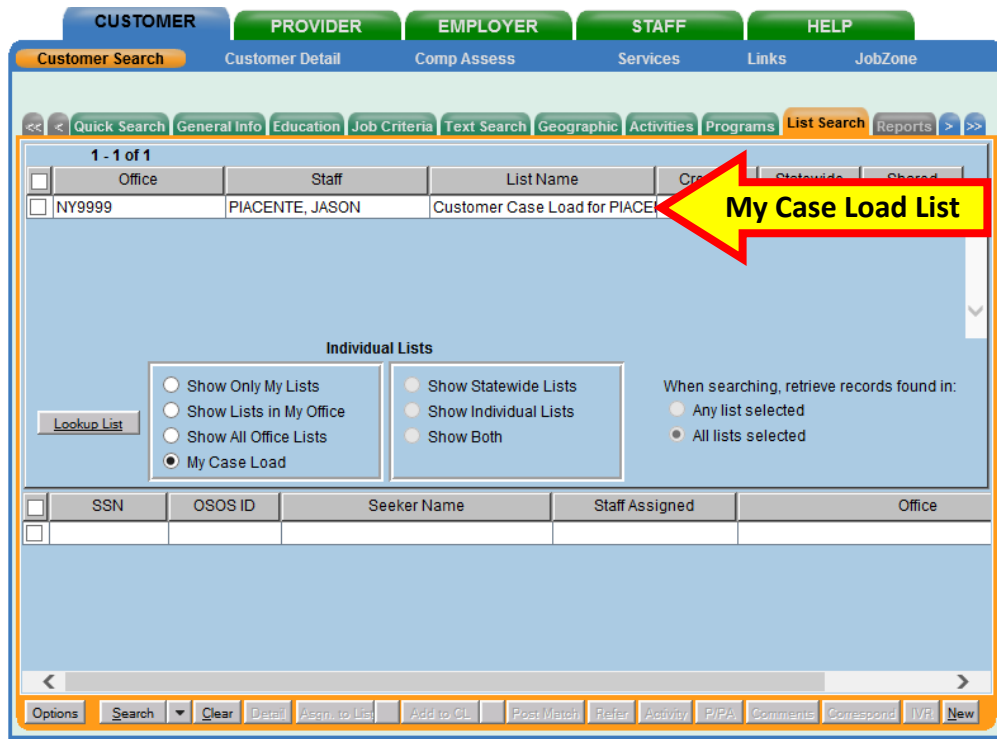
Navigate to the **Customer Search** window and the **List Search** tab.

Select the **My Case Load** option.

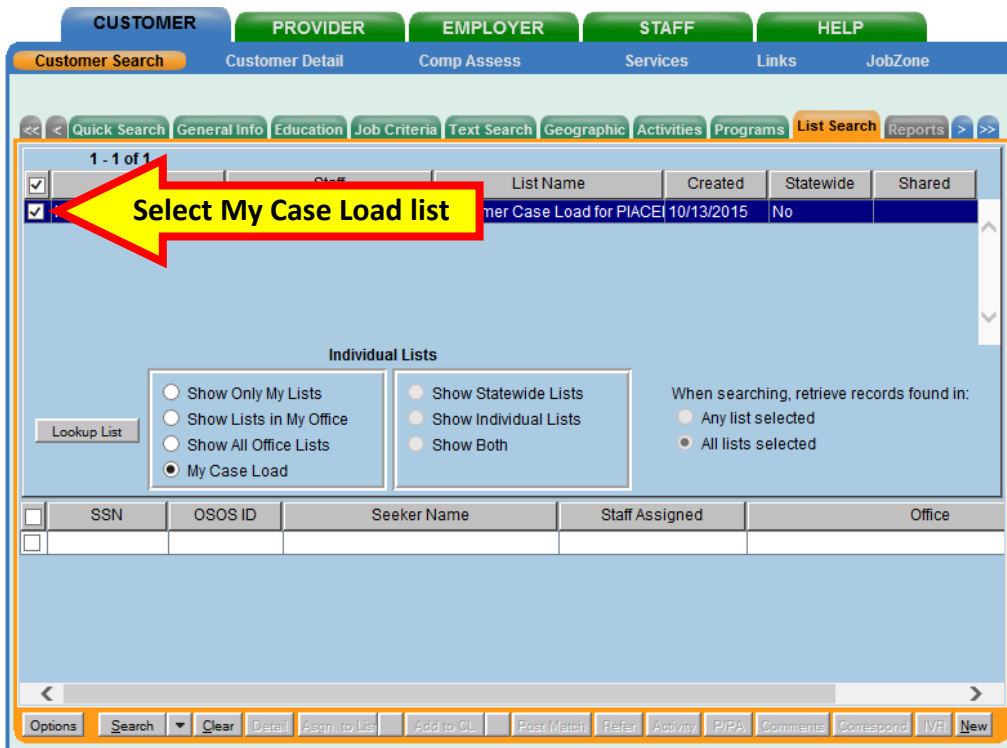
Click the **Lookup List** button.



The DVOP specialist's caseload will appear as the only list.



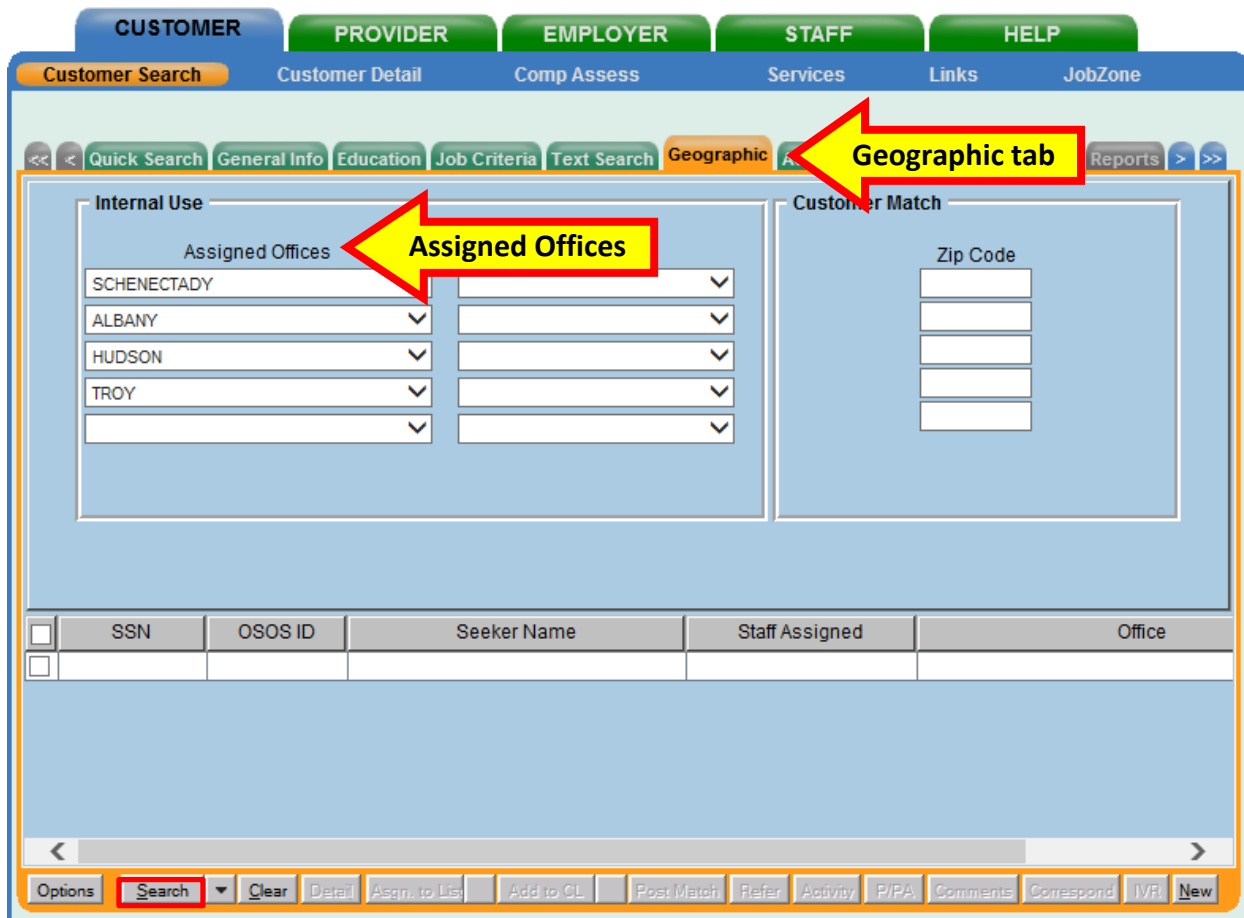
Select the list.



Additional search criterion may be added to reduce the results to a portion of the records in **My Case Load**.

For example, DVOP specialists assigned to multiple offices may prefer to limit the search results to veterans in a specific office. This can be done within the **Geographic** tab and selecting the desired **Assigned Offices**.

After the search criteria has been selected, click the **Search** button.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The main content area has a sub-menu with options: Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, and Reports. The Geographic tab is selected and highlighted with a yellow arrow labeled "Geographic tab".

Under the Geographic tab, there are two sections: "Internal Use" and "Customer Match". The "Internal Use" section has a sub-section "Assigned Offices" with a dropdown menu. The dropdown menu is highlighted with a yellow arrow labeled "Assigned Offices" and shows the following options: SCHENECTADY, ALBANY, HUDSON, TROY, and an empty dropdown. The "Customer Match" section has a "Zip Code" field with four empty input boxes.

Below these sections is a table with the following columns: SSN, OSOS ID, Seeker Name, Staff Assigned, and Office. The table is currently empty.

At the bottom of the interface, there is a toolbar with buttons: Options, Search (highlighted with a red box), Clear, Detail, Assign. to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links

1 - 4 of 4

Quick Search General Info Education Job Criteria Text Search Geographic Activities Programs List Search Reports

1 - 1 of 1

Office	Staff	List Name	Created	Statewide	Shared
NY9999	PIACENTE, JASON	Customer Case Load for PIACE	10/13/2015	No	

Individual Lists

Show Only My Lists
 Show Lists in My Office
 Show All Office Lists
 My Case Load

Show Statewide Lists
 Show Individual Lists
 Show Both

When searching, retrieve records found in:

Any list selected
 All lists selected

Lookup List

SSN	OSOS ID	Seeker Name	Staff Assigned	Office
<input checked="" type="checkbox"/>	NY014972398	DOE, JOHN J	PIACENTE, JASON	TROY
<input type="checkbox"/>	NY015038196	JOHNSON, ROBERT	PIACENTE, JASON	SCHENECTADY
<input checked="" type="checkbox"/>	NY014993615	MALINAK, VET	PIACENTE, JASON	HUDSON
<input type="checkbox"/>	NY015038197	SMITH, PHYLLIS	PIACENTE, JASON	ALBANY

Export
Print List
Save Search

Options Search Clear Detail Asgn. to List Add to CL Post Match Refer Activity P/PA Comments Correspond IVR New

Export or Print List

One or more customer records can be selected and exported to an Excel spreadsheet by clicking the arrow next to the **Search** button and following the steps described earlier in this guide.

RESOURCES AND ASSISTANCE

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

<https://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