

Recording an Initial Assessment Activity OSOS Guide



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PURPOSE

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.

This serves as the user guide describing the appropriate data entry for recording an initial assessment in OSOS.

OSOS DATA ENTRY

All customers must receive an Initial Assessment within the current enrollment.

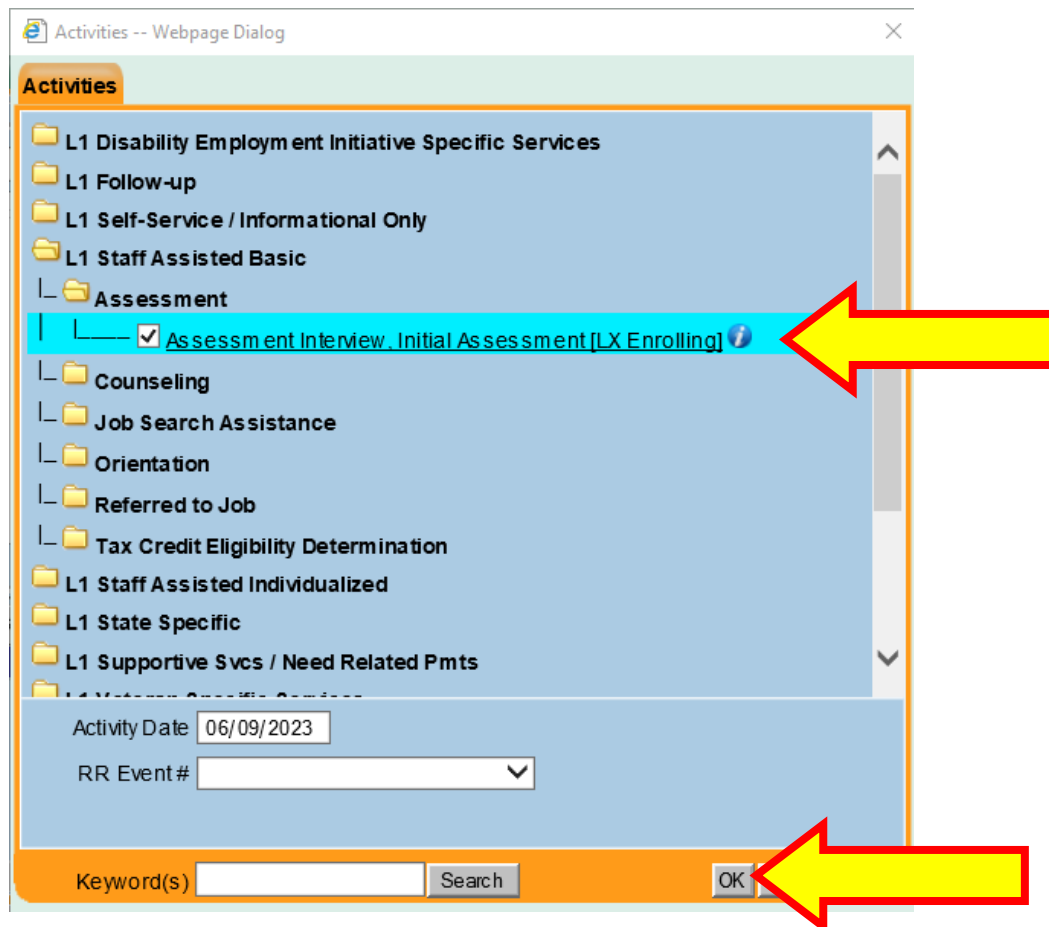


Staff must fully update the customer record and enter all barriers in employment in OSOS prior to entering the first enrolling activity or service. This is to ensure all data elements and eligibility criteria are accurate at the time of enrollment.

After fully updating their OSOS record, the Initial Assessment is recorded through the following steps:

Record the Initial Assessment in the **Customer Detail** section of OSOS.

- Select the **Activities** button.
- In the L1 Staff Assisted Basic folder, select the Assessment Interview, Initial Assessment activity
- Click **Ok**



Activities -- Webpage Dialog

Activities

- └ L1 Disability Employment Initiative Specific Services
- └ L1 Follow-up
- └ L1 Self-Service / Informational Only
- └ L1 Staff Assisted Basic
 - └ Assessment
 - Assessment Interview, Initial Assessment [LX Enrolling]
 - └ Counseling
 - └ Job Search Assistance
 - └ Orientation
 - └ Referred to Job
 - └ Tax Credit Eligibility Determination
- └ L1 Staff Assisted Individualized
- └ L1 State Specific
- └ L1 Supportive Svcs / Need Related Pmts

Activity Date: 06/09/2023

RR Event #: [dropdown]

Keyword(s): [input] Search OK

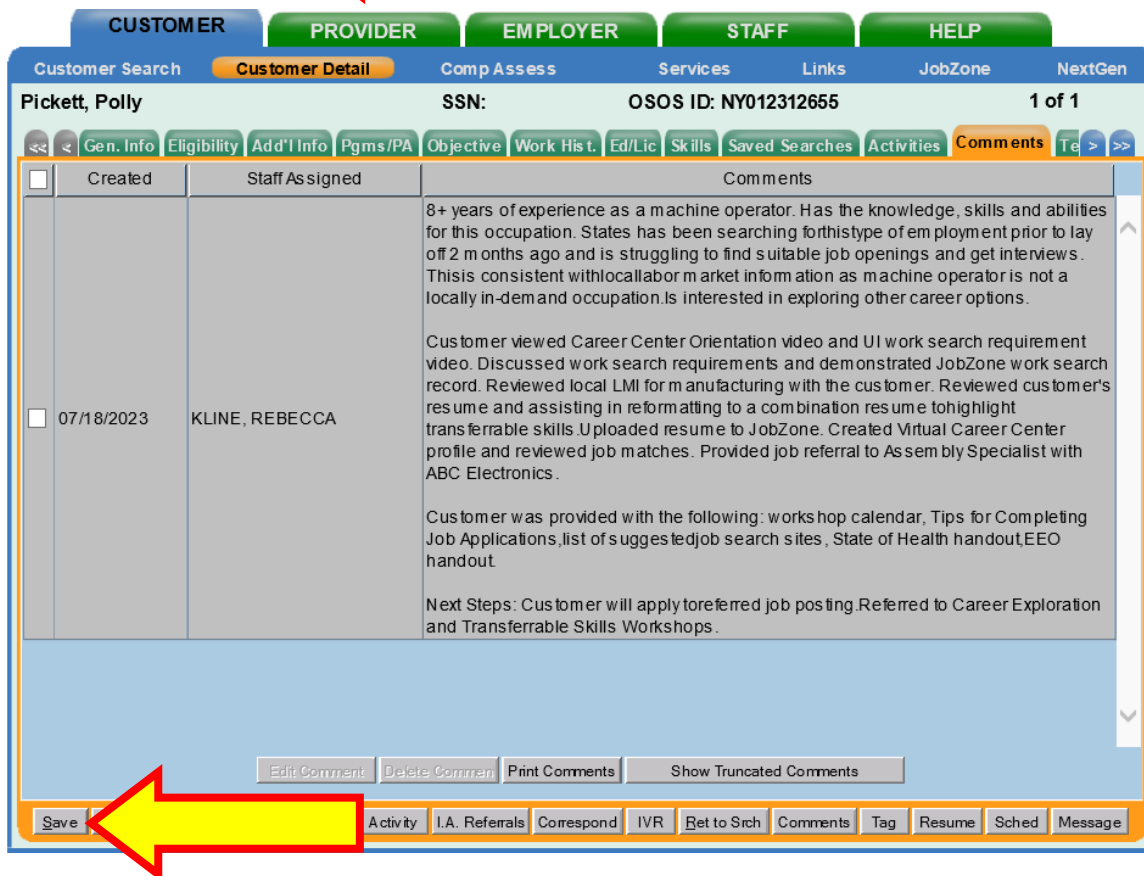
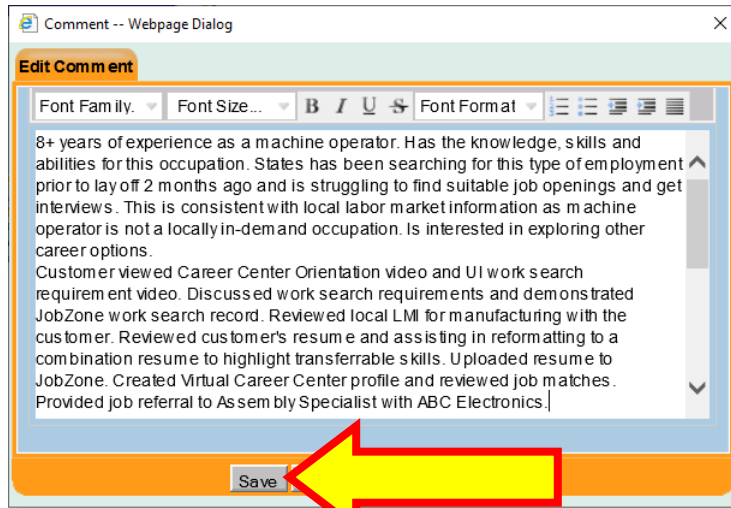


Record a comment detailing the outcome of the assessment.
Click the **Comments** button at the bottom of the screen.

The screenshot displays the OSOS system interface. At the top, there are navigation tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail (selected), Comp Assess, Services, Links, JobZone, and NextGen. The main header shows the customer name 'Pickett, Polly', SSN, and OSOS ID: NY012312655. A secondary navigation bar includes Gen. Info, Eligibility, Add'l Info, Pgms/PA, Objective, Work His t., Ed/Lic, Skills, Saved Searches, Activities, and Comments (highlighted). The main content area is a large blue box with a table header containing 'Created', 'Staff Assigned', and 'Comments'. Below the table are buttons for 'Edit Comment', 'Delete Comment', 'Print Comments', and 'Show Truncated Comments'. At the bottom, a navigation bar contains buttons for Save, Start Match, Services, Comp Asses, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, and Comments. A large yellow arrow with a red outline points to the 'Comments' button in this bottom bar.

Type your comment and click the **Save** button in the Comment box.
Then click the **Save** button at the bottom of the screen.

Use the SENSE Case Note Writing Model (e.g., SENSE- Situation, Evaluation, Next Steps, Sufficient Information, Employment Related).





RESOURCES AND ASSISTANCE

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

[Workforce Professionals Tools](#)

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

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