

RECORDING AN INITIAL ASSESSMENT ACTIVITY



TABLE OF CONTENTS

Purpose	1
Recording an Initial Assessment	2
Resources and Assistance	3

PURPOSE

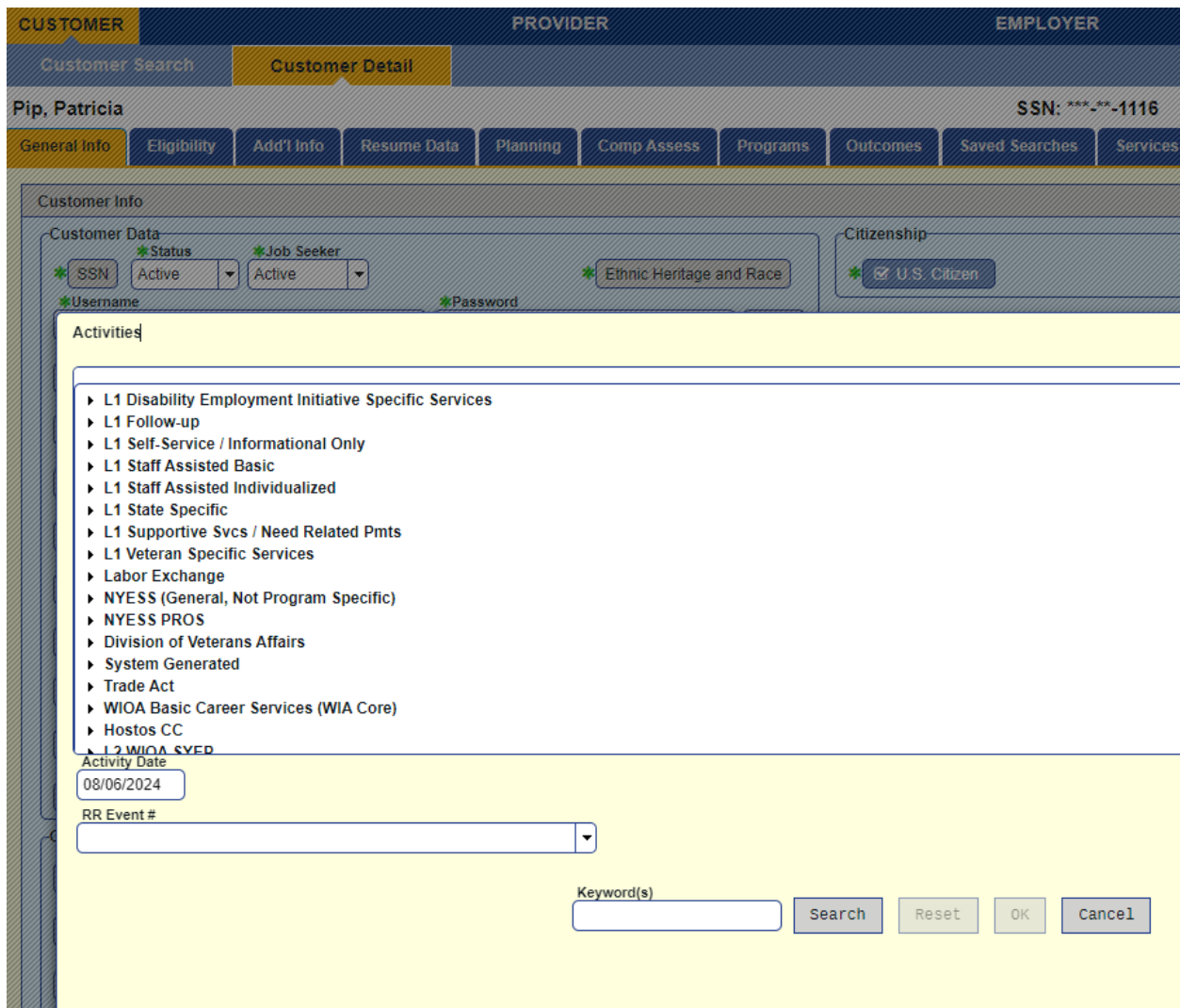
This serves as an attachment to TA 08 - 4.2 and as the user guide describing the appropriate data entry for an initial assessment.

RECORDING AN INITIAL ASSESSMENT

According to TA 08-4.2, all customers must receive an Initial Assessment within the current enrollment. This is recorded in OSOS through the below steps.

Record the **Initial Assessment** in the **Customer Detail** window.

Select the **Activity** button at the bottom of the screen and select the appropriate OSOS L1 activity (L1 Staff Assisted Basic Assessment Interview, Initial Assessment, etc.).

CUSTOMER PROVIDER EMPLOYER

Customer Search Customer Detail

Pip, Patricia SSN: ***-**-1116

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

Customer Info

Customer Data

*SSN Active *Status Active *Job Seeker Active *Ethnic Heritage and Race *U.S. Citizen

*Username *Password

Activities

- ▶ L1 Disability Employment Initiative Specific Services
- ▶ L1 Follow-up
- ▶ L1 Self-Service / Informational Only
- ▶ L1 Staff Assisted Basic
- ▶ L1 Staff Assisted Individualized
- ▶ L1 State Specific
- ▶ L1 Supportive Svcs / Need Related Pmts
- ▶ L1 Veteran Specific Services
- ▶ Labor Exchange
- ▶ NYESS (General, Not Program Specific)
- ▶ NYESS PROS
- ▶ Division of Veterans Affairs
- ▶ System Generated
- ▶ Trade Act
- ▶ WIOA Basic Career Services (WIA Core)
- ▶ Hostos CC
- ▶ L1 WIOA SYEP

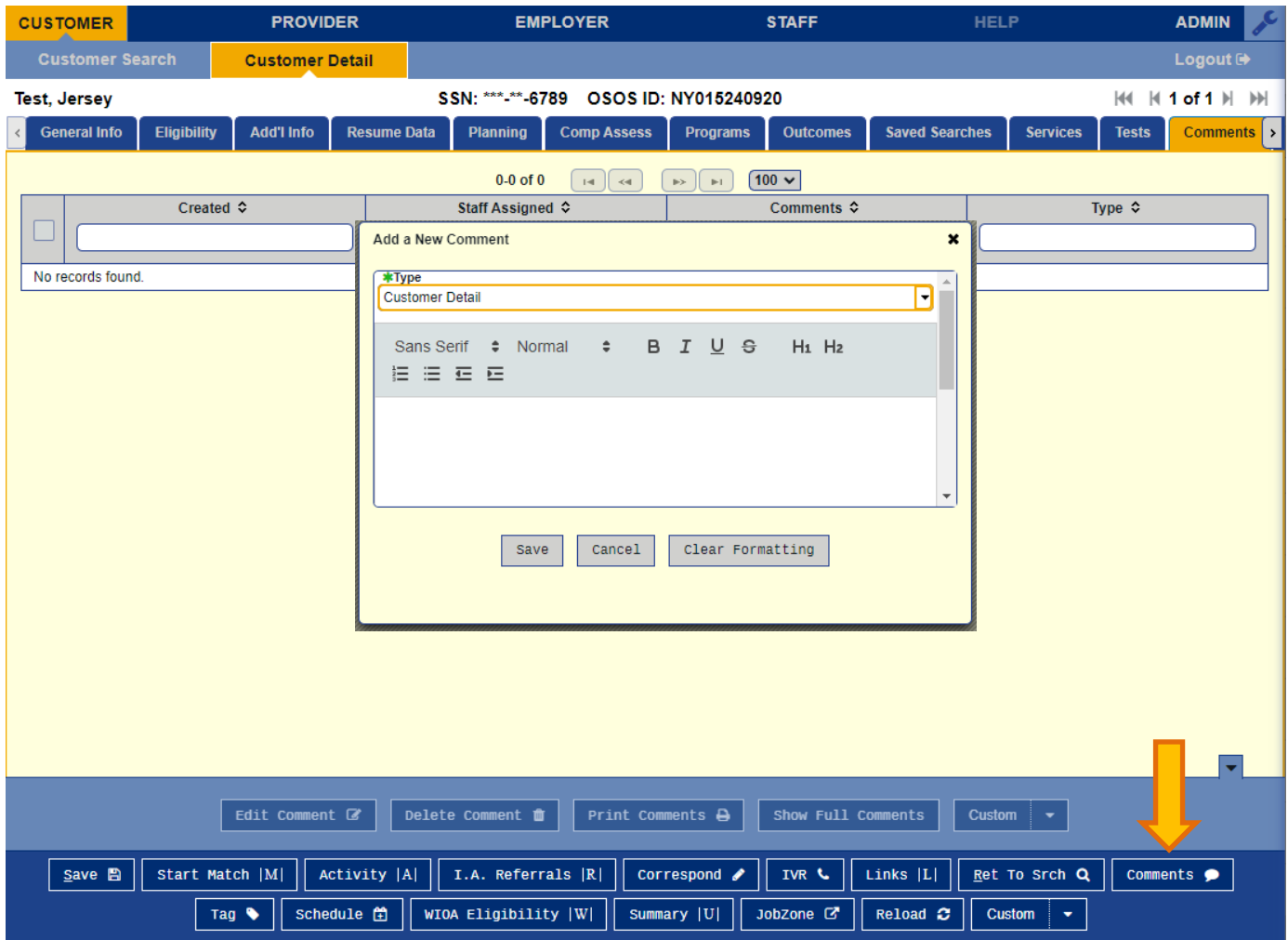
Activity Date: 08/06/2024

RR Event #

Keyword(s) Search Reset OK Cancel

Recording a comment

Record a **Comment** by clicking on the **comment** button. Make sure that the comment justifies the **Initial Assessment outcome**. Use the **SENSE** Case Note Writing Model (SENSE- Situation, Evaluation, Next Steps, Sufficient Information, Employment Related)



The screenshot displays the OSOS web interface for a customer named "Test, Jersey" with SSN: ***-**-6789 and OSOS ID: NY015240920. The "Comments" tab is active, showing a table with columns for "Created", "Staff Assigned", "Comments", and "Type". A modal dialog titled "Add a New Comment" is open, allowing the user to enter a comment. The dialog includes a "Type" dropdown menu currently set to "Customer Detail", a rich text editor with formatting options (Sans Serif, Normal, Bold, Italic, Underline, Link, H1, H2), and buttons for "Save", "Cancel", and "Clear Formatting". An orange arrow points to the "Comments" button in the bottom navigation bar.

RESOURCES AND ASSISTANCE

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

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