RECORDING AN INITIAL ASSESSMENT ACTIVITY
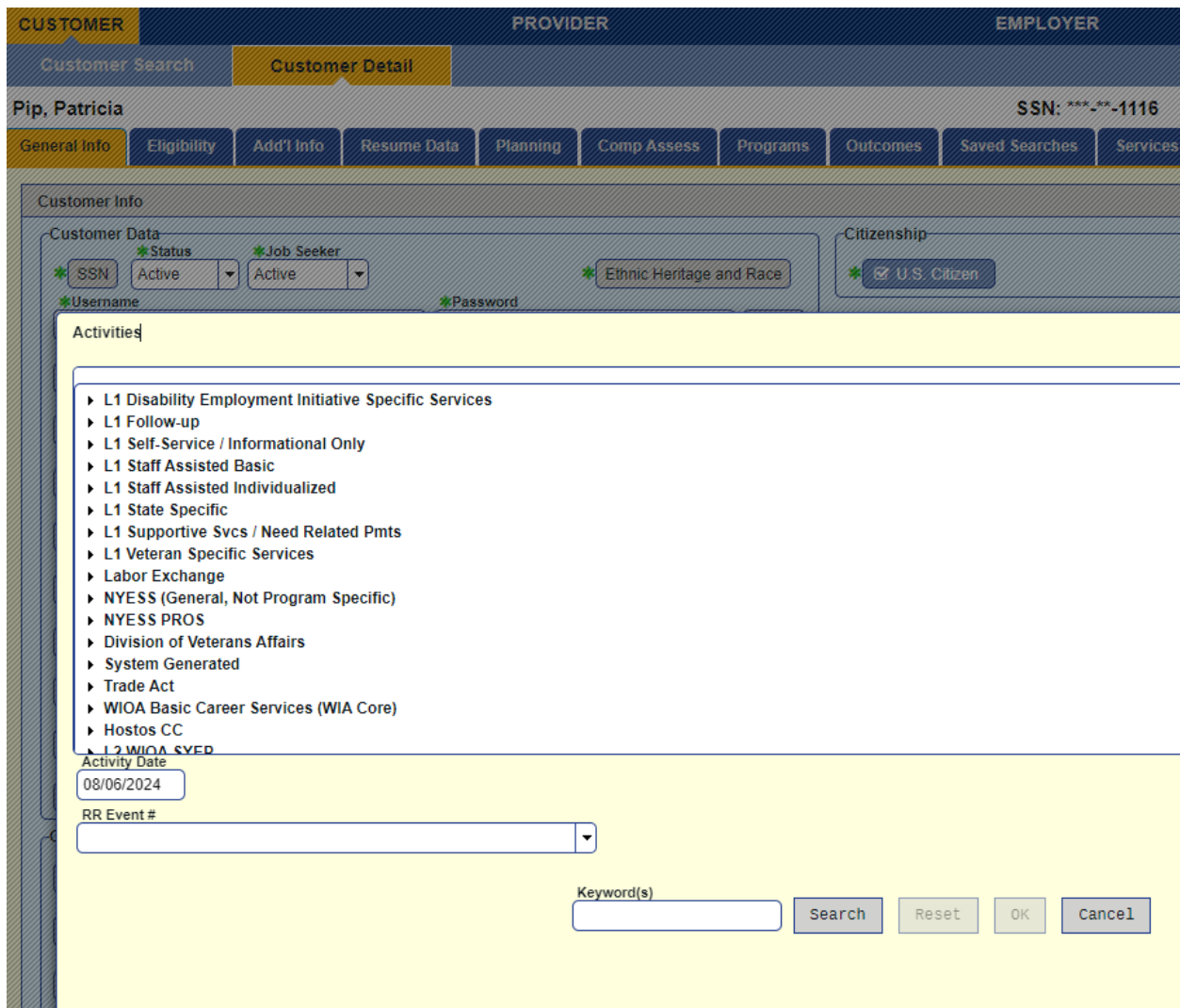
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PURPOSE

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

RECORDNING 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.).
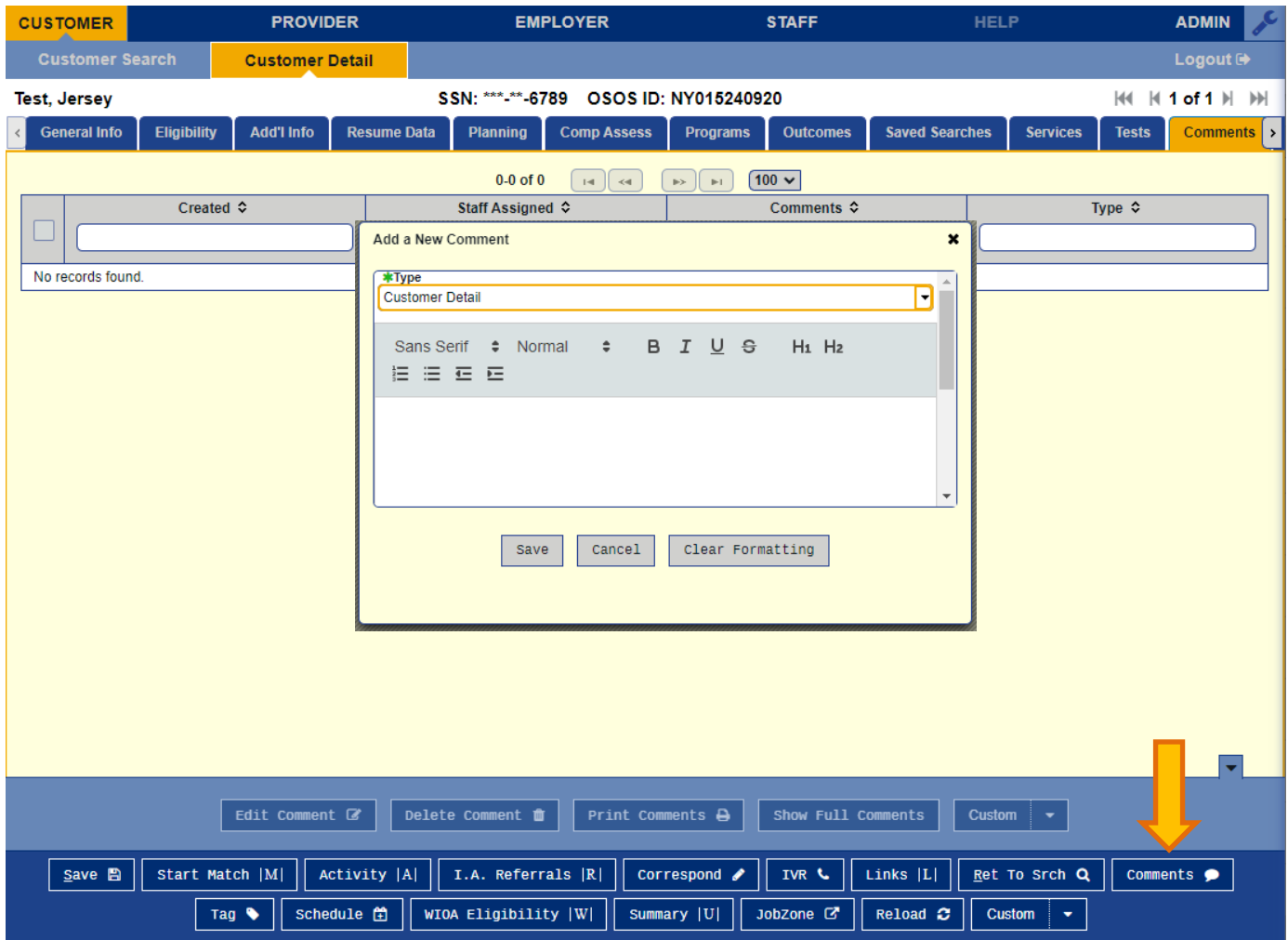
Recording a comment

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)

CUSTOMER	PROVIDER	EMPLOYER	STAFF	HELP	ADMIN 🔧
Customer Search	Customer Detail				Logout ➡

Test, Jersey   SSN: ***-**-6789   OSOS ID: NY015240920   ⏮ ◀ 1 of 1 ▶ ⏭

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

0-0 of 0   ⏮ ◀◀   ▶▶ ▶⏮   100 ▾

☐	Created ⇕	Staff Assigned ⇕	Comments ⇕	Type ⇕

No records found.

Add a New Comment   ✖

✱Type
Customer Detail   ▾

Sans Serif ⇕   Normal ⇕   **B** *I* U̲ S̶   H₁ H₂
☰ ☰ ⇤ ⇥

[Save]   [Cancel]   [Clear Formatting]

[Edit Comment ✎]   [Delete Comment 🗑]   [Print Comments 🖨]   [Show Full Comments]   [Custom ▾]

[Save 💾]   [Start Match |M|]   [Activity |A|]   [I.A. Referrals |R|]   [Correspond ✎]   [IVR ☎]   [Links |L|]   [Ret To Srch 🔍]   [Comments 💬]
[Tag 🏷]   [Schedule 📅]   [WIOA Eligibility |W|]   [Summary |U|]   [JobZone ⧉]   [Reload 🔄]   [Custom ▾]

RESOURCES AND ASSISTANCE

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