

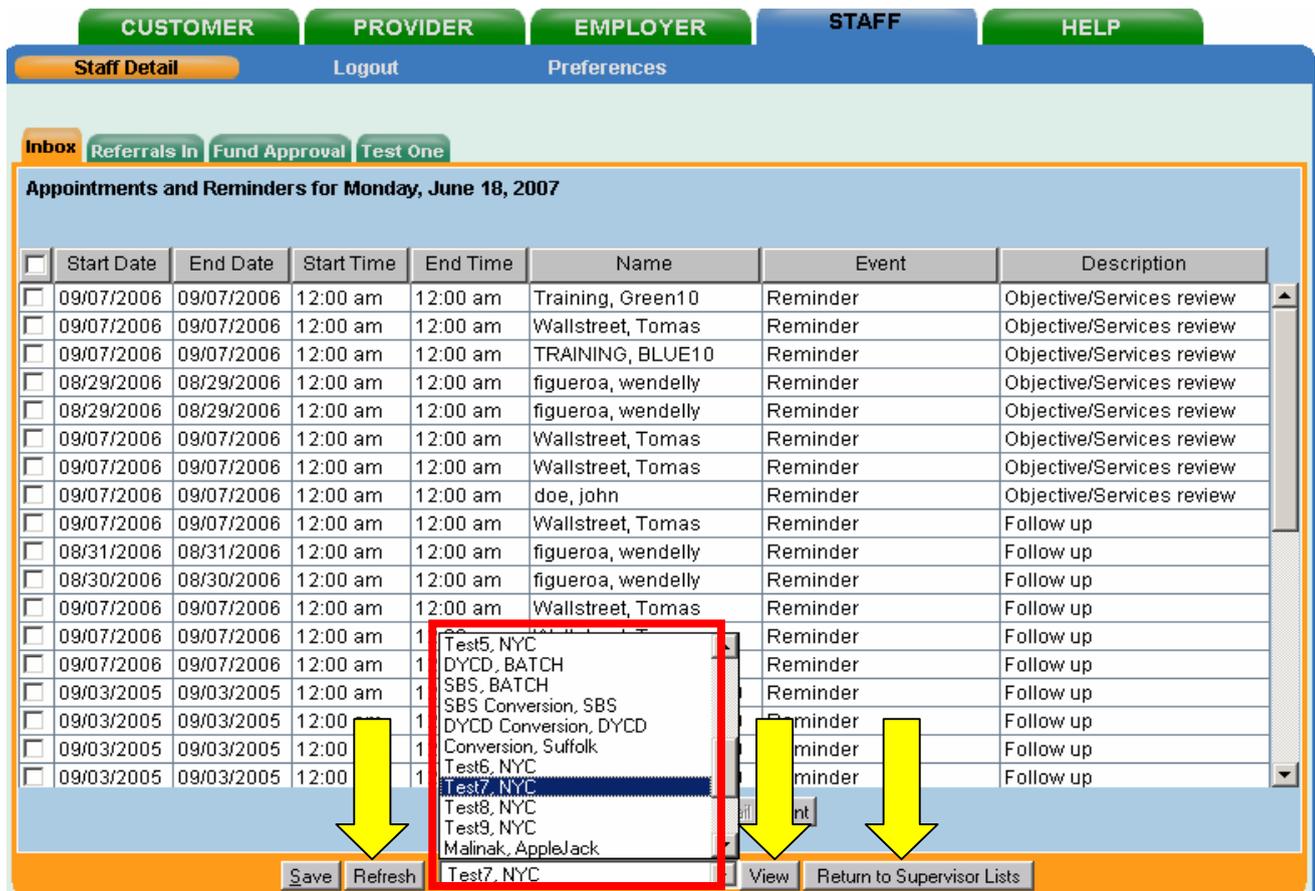
OSOS Supervisory Information

OSOS user accounts require that supervisory staff be identified to use the functions described below, which can be done at the time accounts are set up or added at a later date. Supervisory staff persons who use OSOS must log into OSOS and click on **Staff Detail**.

Staff Inboxes

Supervisors can view staff inboxes of the OSOS users they supervise by clicking on the drop-down at the bottom of the Inbox screen and then click on the **View** button.

Note: this is especially useful for monitoring customers once assigned to a staff person who is no longer employed at the One Stop or using OSOS.



The screenshot shows the OSOS Staff Detail interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Staff Detail, Logout, and Preferences. The main content area is titled 'Inbox' and contains sub-tabs: Referrals In, Fund Approval, and Test One. The primary view is 'Appointments and Reminders for Monday, June 18, 2007', which is a table with columns for Start Date, End Date, Start Time, End Time, Name, Event, and Description. A dropdown menu is open at the bottom of the table, listing various test entries like 'Test5, NYC', 'DYCD, BATCH', 'SBS, BATCH', etc. A red box highlights this dropdown menu. At the bottom of the interface, there are buttons for 'Save', 'Refresh', 'View', and 'Return to Supervisor Lists'. Three yellow arrows point to the 'Refresh', 'View', and 'Return to Supervisor Lists' buttons.

<input type="checkbox"/>	Start Date	End Date	Start Time	End Time	Name	Event	Description
<input type="checkbox"/>	09/07/2006	09/07/2006	12:00 am	12:00 am	Training, Green10	Reminder	Objective/Services review
<input type="checkbox"/>	09/07/2006	09/07/2006	12:00 am	12:00 am	Wallstreet, Tomas	Reminder	Objective/Services review
<input type="checkbox"/>	09/07/2006	09/07/2006	12:00 am	12:00 am	TRAINING, BLUE10	Reminder	Objective/Services review
<input type="checkbox"/>	08/29/2006	08/29/2006	12:00 am	12:00 am	figueroa, wendelly	Reminder	Objective/Services review
<input type="checkbox"/>	08/29/2006	08/29/2006	12:00 am	12:00 am	figueroa, wendelly	Reminder	Objective/Services review
<input type="checkbox"/>	09/07/2006	09/07/2006	12:00 am	12:00 am	Wallstreet, Tomas	Reminder	Objective/Services review
<input type="checkbox"/>	09/07/2006	09/07/2006	12:00 am	12:00 am	Wallstreet, Tomas	Reminder	Objective/Services review
<input type="checkbox"/>	09/07/2006	09/07/2006	12:00 am	12:00 am	doe, john	Reminder	Objective/Services review
<input type="checkbox"/>	09/07/2006	09/07/2006	12:00 am	12:00 am	Wallstreet, Tomas	Reminder	Follow up
<input type="checkbox"/>	08/31/2006	08/31/2006	12:00 am	12:00 am	figueroa, wendelly	Reminder	Follow up
<input type="checkbox"/>	08/30/2006	08/30/2006	12:00 am	12:00 am	figueroa, wendelly	Reminder	Follow up
<input type="checkbox"/>	09/07/2006	09/07/2006	12:00 am	12:00 am	Wallstreet, Tomas	Reminder	Follow up
<input type="checkbox"/>	09/07/2006	09/07/2006	12:00 am	12:00 am	Test5, NYC	Reminder	Follow up
<input type="checkbox"/>	09/07/2006	09/07/2006	12:00 am	12:00 am	DYCD, BATCH	Reminder	Follow up
<input type="checkbox"/>	09/03/2005	09/03/2005	12:00 am	12:00 am	SBS, BATCH	Reminder	Follow up
<input type="checkbox"/>	09/03/2005	09/03/2005	12:00 am	12:00 am	SBS Conversion, SBS	Reminder	Follow up
<input type="checkbox"/>	09/03/2005	09/03/2005	12:00 am	12:00 am	DYCD Conversion, DYCD	Reminder	Follow up
<input type="checkbox"/>	09/03/2005	09/03/2005	12:00 am	12:00 am	Conversion, Suffolk	Reminder	Follow up
<input type="checkbox"/>	09/03/2005	09/03/2005	12:00 am	12:00 am	Test6, NYC	Reminder	Follow up
<input type="checkbox"/>	09/03/2005	09/03/2005	12:00 am	12:00 am	Test7, NYC	Reminder	Follow up
<input type="checkbox"/>	09/03/2005	09/03/2005	12:00 am	12:00 am	Test8, NYC	Reminder	Follow up
<input type="checkbox"/>	09/03/2005	09/03/2005	12:00 am	12:00 am	Test9, NYC	Reminder	Follow up
<input type="checkbox"/>	09/03/2005	09/03/2005	12:00 am	12:00 am	Malinak, AppleJack	Reminder	Follow up
<input type="checkbox"/>	09/03/2005	09/03/2005	12:00 am	12:00 am	Test7, NYC	Reminder	Follow up

To update the currently logged in user's Inbox, click on the **Refresh** button to the left of the drop-down list. To quickly return to your own listed information, click the **Return to Supervisor Lists** button.

Referrals In Tab

The Referrals In tab is where an electronic Interagency Referral is received and accepted or denied, and assigned to a staff member for follow-up.

Electronic Interagency Referral is a function of OSOS, which requires the designation of a supervisory recipient in each office. Adjustments to staff accounts may have to occur for the functionality to work appropriately.

It is strongly recommended that local areas that plan to use the Interagency Referral function develop a local strategy and agreement about how it will be used.

The following graphic shows a number of interagency referrals in the Referrals In box. The columns display the Date, the Referred From office, the OSOS ID number of the customer, the customers' Name, the Reason for Referral, and the Outcomes, all of which can be sorted by clicking on the gray column headings.

The screenshot shows the OSOS Referrals In tab interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF (selected), and HELP. Below these are buttons for Staff Detail, Logout, and Preferences. The main content area has tabs for Inbox, Referrals In (selected), Fund Approval, and Test One. A table of referrals is displayed with the following columns: Date, Referred From, OSOS ID, Name, Reason for Referral, and Outcome. The table contains 15 rows of data. Below the table, there is a Staff Assignment field with an Assign button, and buttons for Detail, Print, and Customer Detail. At the bottom, there are buttons for Save, Refresh, View, and Return to Supervisor Lists.

	Date	Referred From	OSOS ID	Name	Reason for Referral	Outcome
<input type="checkbox"/>	03/07/2003	Newburgh Career Cente	NY000046245	Malinak, Baby	Needs real help.	Denied
<input type="checkbox"/>	10/15/2003	LABOR PLANNING CEN	NY000083438	NC Veteran, Eleven	Training for computer skills	Active
<input type="checkbox"/>	10/15/2003	LABOR PLANNING CEN	NY000084098	NC Veteran, Eight	cdla	Active
<input type="checkbox"/>	10/15/2003	LABOR PLANNING CEN	NY000084002	NC Vet2, Eleven	Explore funding for education.	Active
<input type="checkbox"/>	10/16/2003	LABOR PLANNING CEN	NY000084002	NC Vet2, Eleven	Obtain information on education, finan	Active
<input type="checkbox"/>	01/16/2004	LABOR PLANNING CEN	NY000105558	Stabenow, Dana	test	Active
<input type="checkbox"/>	08/12/2004	WIA Central Security Uni	NY000063926	Malinak, Caddyshack	because	Active
<input type="checkbox"/>	01/10/2005	Middletown Career Cent	NY000086112	Tester, Cole	testing the system	Active
<input type="checkbox"/>	02/09/2005	ONEONTA	NY000060745	BRISSETTE, PETER	TESTING.	Denied
<input type="checkbox"/>	03/17/2005	LABOR PLANNING CEN	NY000064990	VETERAN1, JOSE	Dislocated	Active
<input type="checkbox"/>	03/24/2005	ALBANY	NY000063893	Master, Mac	testing.	Active
<input type="checkbox"/>	11/17/2005	LOCKPORT	NY000103952	el Firda, Otto	test 3.5.02	Active
<input type="checkbox"/>	02/17/2006	Newburgh Career Cente	NY000145783	Bird1, Tweety1	to moshe	Active
<input type="checkbox"/>	02/27/2006	Newburgh DoES	NY000145783	Bird1, Tweety1	to moshe	Active

To accept or deny a referral, click on the check box next to the customer and click on Detail.

The screenshot shows the OSOS Staff Detail interface. At the top, there are navigation buttons: CUSTOMER, PROVIDER, EMPLOYER, STAFF (highlighted), and HELP. Below these are 'Staff Detail', 'Logout', and 'Preferences'. The main area has tabs for 'Inbox', 'Referrals In' (selected), 'Fund Approval', and 'Test One'. A table lists referrals with columns: Date, Referred From, OSOS ID, Name, Reason for Referral, and Outcome. The row for '01/10/2005' is selected, and its checkbox is checked. Below the table, there is a 'Staff Assignment' dropdown menu and buttons for 'Assign', 'Detail' (highlighted with a red box), 'Print', and 'Customer Detail'. At the bottom, there are 'Save', 'Refresh', 'View', and 'Return to Supervisor Lists' buttons.

<input type="checkbox"/>	Date	Referred From	OSOS ID	Name	Reason for Referral	Outcome
<input type="checkbox"/>	03/07/2003	Newburgh Career Cente	NY000046245	Malinak, Baby	Needs real help.	Denied
<input type="checkbox"/>	10/15/2003	LABOR PLANNING CEN	NY000083438	NC Veteran, Eleven	Training for computer skills	Active
<input type="checkbox"/>	10/15/2003	LABOR PLANNING CEN	NY000084098	NC Veteran, Eight	cdla	Active
<input type="checkbox"/>	10/15/2003	LABOR PLANNING CEN	NY000084002	NC Vet2, Eleven	Explore funding for education.	Active
<input type="checkbox"/>	10/16/2003	LABOR PLANNING CEN	NY000084002	NC Vet2, Eleven	Obtain information on education, finan	Active
<input type="checkbox"/>	01/16/2004	LABOR PLANNING CEN	NY000105558	Stabenow, Dana	test	Active
<input type="checkbox"/>	08/12/2004	WIA Central Security Uni	NY000063926	Malinak, Caddyshack	because	Assigned
<input checked="" type="checkbox"/>	01/10/2005	Middletown Career Cent	NY000086112	Tester, Cole	testing the system	Active
<input type="checkbox"/>	02/09/2005	ONEONTA	NY000060745	BRISSETTE, PETER	TESTING.	Denied
<input type="checkbox"/>	03/17/2005	LABOR PLANNING CEN	NY000064990	VETERAN1, JOSE	Dislocated	Active
<input type="checkbox"/>	03/24/2005	ALBANY	NY000063893	Master, Mac	testing.	Active
<input type="checkbox"/>	11/17/2005	LOCKPORT	NY000103952	el Firda, Otto	test 3.5.02	Active
<input type="checkbox"/>	02/17/2006	Newburgh Career Cente	NY000145783	Bird1, Tweety1	to moshe	Active
<input type="checkbox"/>	02/27/2006	Newburgh DoES	NY000145783	Bird1, Tweety1	to moshe	Active

The Interagency Referral detail information will be displayed.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Staff Detail Inter-Agency Referral -- Web Page Dialog

Inter-Agency Referral

SSN 888-11-5555 OSOS ID NY000063926

Last Name Malinak

First Caddyshack MI

Referral Date 08/12/2004 Date of Birth 01/01/1986

Phone

Address 22 Countryclub Drive

City Bushwood

State New York Zip 12240-1234

Referring Staff VanValkenburg, Pat

Referring Agency Department of Labor

Referring Office WIA Central Security Unit

Phone Ext

Destination Agency Orange County WAE

Destination Office Newburgh Career Center

Appointment Date Appointment Time

Reason Referred because

Referral Outcome

Ok Print Cancel

Inbox	Referrals In	Func
<input type="checkbox"/>	Date	Ref
<input type="checkbox"/>	03/07/2003	Newbur
<input type="checkbox"/>	10/15/2003	LABOR
<input type="checkbox"/>	10/15/2003	LABOR
<input type="checkbox"/>	10/15/2003	LABOR
<input type="checkbox"/>	10/16/2003	LABOR
<input type="checkbox"/>	01/16/2004	LABOR
<input checked="" type="checkbox"/>	08/12/2004	WIA Cer
<input type="checkbox"/>	01/10/2005	Middletc
<input type="checkbox"/>	02/09/2005	ONEON
<input type="checkbox"/>	03/17/2005	LABOR
<input type="checkbox"/>	03/24/2005	ALBANY
<input type="checkbox"/>	11/17/2005	LOCKPC
<input type="checkbox"/>	02/17/2006	Newbur
<input type="checkbox"/>	02/27/2006	Newbur

Referral	Outcome
	Denied
kills	Active
	Active
cation.	Active
education, finan	Active
	Active
	Active
	Denied
	Active
	Active
	Active
	Active

Staff: VanValkenburg, Pa Security: Delete 05/23/2007

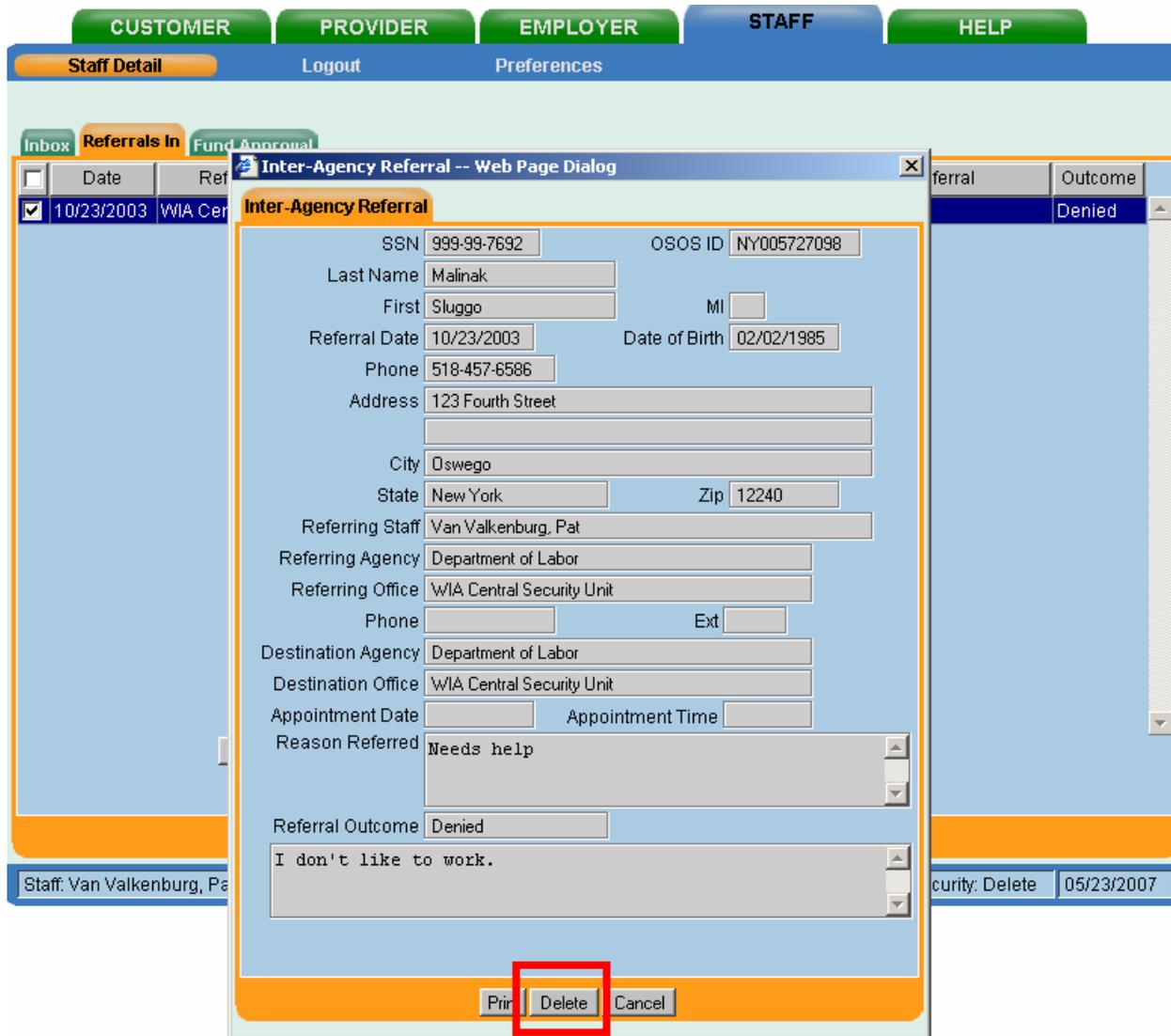
The referral must be accepted or denied by clicking on the Referral Outcome drop-down field. If the referral is being denied, a reason must be included in the text field below the Referral Outcome drop-down field. Once the choice is made, click on the OK button.

Referral Outcome

Accepted
Denied

Ok Print Cancel

The Referrals In box is also where the electronic notices get displayed indicating customers who were referred by someone in the office of the logged-in supervisor, and denied by the destination office. Click on the inbox item to highlight and then the Detail button to see the Inter-Agency Referral details.



To delete a denied Inter-Agency Referral, on the Referrals In tab, click on the denied referral to highlight the entry. Click the **Detail** button at the bottom of the Referrals In page. The Inter-Agency Referral pop-up window will appear. Click the **Delete** button on the bottom of the Inter-Agency Referral popup window. The referral will be deleted and the pop-up window will close. Click the **Save** button at the bottom of the screen.

Assignment of Incoming Referral

An incoming referred customer can be assigned to a specific staff person by clicking on the customer to highlight, and then clicking on the **Staff Assignment** drop-down field.

The screenshot displays the OSOS Staff Detail interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Staff Detail, Logout, and Preferences. A secondary set of tabs includes Inbox, Referrals In (highlighted), Fund Approval, and Test One. The main area contains a table of referral records. The selected row is highlighted in blue, and a yellow arrow points to the Staff Assignment dropdown menu below it. The dropdown menu is open, showing a list of staff names, with 'Test5, NYC' selected. A red box highlights the dropdown menu and the 'Save' button below it.

<input type="checkbox"/>	Date	Referred From	OSOS ID	Name	Reason for Referral	Outcome
<input type="checkbox"/>	03/07/2003	Newburgh Career Cente	NY000046245	Malinak, Baby	Needs real help.	Denied
<input type="checkbox"/>	10/15/2003	LABOR PLANNING CEN	NY000083438	NC Veteran, Eleven	Training for computer skills	Active
<input type="checkbox"/>	10/15/2003	LABOR PLANNING CEN	NY000084098	NC Veteran, Eight	cdla	Active
<input type="checkbox"/>	10/15/2003	LABOR PLANNING CEN	NY000084002	NC Vet2, Eleven	Explore funding for education.	Active
<input type="checkbox"/>	10/16/2003	LABOR PLANNING CEN	NY000084002	NC Vet2, Eleven	Obtain information on education, finan	Active
<input type="checkbox"/>	01/16/2004	LABOR PLANNING CEN	NY000105558	Stabenow, Dana	test	Active
<input checked="" type="checkbox"/>	08/12/2004	WIA Central Security Uni	NY000063926	Malinak, Caddyshack	because	Active
<input type="checkbox"/>	01/10/2005	Middletown Career Cent	NY000086112	Tester, Cole	testing the system	Active
<input type="checkbox"/>	02/09/2005	ONEONTA	NY000060745	BRISSETTE, PETER	TESTING.	Denied
<input type="checkbox"/>	03/17/2005	LABOR PLANNING CEN	NY000064990	VETERAN1, JOSE	Dislocated	Active
<input type="checkbox"/>	03/24/2005	ALBANY	NY000063893	Master, Mac	testing.	Active
<input type="checkbox"/>	11/17/2005	LOCKPORT	NY000103952	el Firda, Otto	test 3.5.02	Active
<input type="checkbox"/>	02/17/2006	Newburgh Career Cente	NY000145783	Bird1, Tweety1	to moshe	Active
<input type="checkbox"/>	02/27/2006	Newburgh DoES	NY000145783	Bird1, Tweety1	to moshe	Active

Staff Assignment: [Dropdown Menu]

Buttons: Assign, Detail, Print, Customer Detail

Buttons: Save, View, Return to Supervisor Lists

Staff: VanValkenburg, Pat

Security: Delete 05/29/2007

After the appropriate staff person is chosen from the drop-down, click on the **Assign** button, and then click on the **Save** button. The customer will then electronically display in the assigned staff persons Referrals In box either at login or when their staff inbox is refreshed.