



## Resources: Strategies for Adult Priority of Service (APoS)



**When having conversations with staff in the Department of Social Services, remind them that a lot of the services we provide through our One Stop offices align with a lot of their requirements and performance.**

– Nicole Wilson, Employment & Training Director, Herkimer



**Staff development for accurate data entry and keeping up with the quarterly APoS reports is helpful.**

– Craig Horowitz, Assistant Administrative Director, Suffolk

**To reach the 75% APoS metric goal, build strategic partnerships. See Innovative Actions and Multi-Sector Partners Resources.** – Juie Deo, NYSDOL

**The OSOS Lists are underutilized for case management and supervisory review.** – Rebecca Kline, NYSDOL

## Attached: Insights, Highlights, and Slides from WIOA Leaders

### [Recording](#)

Click: "View session recordings" at the top right corner | Search: Strategies for Adult Priority of Service

Included Resources are for:

- Data Management and Accuracy
- Outreach and Partner Collaboration
- Staff Development and Recruitment

Agenda:

- Understanding APoS details
- Trends in the number of APoS populations we serve
- Improving APoS data entry
- Establishing partnerships and innovative actions

**APoS Office Hours: Tuesday, March 5, 12, and 19 from 3:30-4:30 pm [Register via Zoom](#)**

**Watch [how to use the APoS customer lists video](#) and join the office hours with questions!**

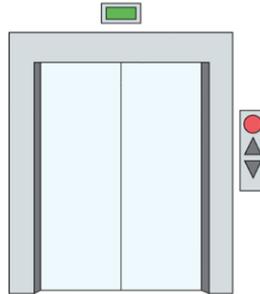
# How have you built partnerships for outreach and support from organizations that serve APOs populations? (Local Expertise)

## WIOA Elevator Pitch to DSS

### Simple Eligibility

### Strong Free to Customer Services

Transitional Jobs  
Occupational Skills Training  
Job Search Skills and Prep  
Job Fairs and Business Engagement  
Northstar Digital Literacy  
Virtual Reality Career Exploration  
Supportive Services and Follow-up



ff: Alternative Employment Strategies for Hard-to-Employ TANF Recipients

## Craig ([craig.horowitz@suffolkcountyny.gov](mailto:craig.horowitz@suffolkcountyny.gov)) and his staff:

- Set up community-based initiatives where staff are co-located in hard-to-serve communities throughout the county. These efforts account for around 10% of Suffolk County enrollment!
- Work seamlessly with the Department of Social Services (DSS) to reach the hardest-to-serve populations through the [Suffolk Works Employment Program](#).
- Put in the time to build and maintain partnerships with many community service agencies that make referrals to their office.

## Nicole ([nwilson@herkimercounty.org](mailto:nwilson@herkimercounty.org)) and her staff:

- Work closely with DSS to create a direct pipeline for individuals applying for cash assistance and remind them that many of the services provided at the Career Center align with DSS requirements.
- Created a four-week employment readiness training course to help these individuals find suitable employment.
- Offer in-house GED services through a partnership with their local BOCES – a phenomenal resource!



***Career Centers and social services agencies are meeting the needs of a shared customer.  
We can work together to improve outcomes for everyone!***

Building Partnerships Requires Effort, Time, Resources! Need Ideas?

[Aspen Institute's Workforce Cafe highlights collaboration challenges and necessities from your peers across the U.S.](#)

## Using Quarterly APOs Reports to Correct Data Entry

APOs Customer List Office Hours from 3:30-4:30 pm [Zoom Registration](#)

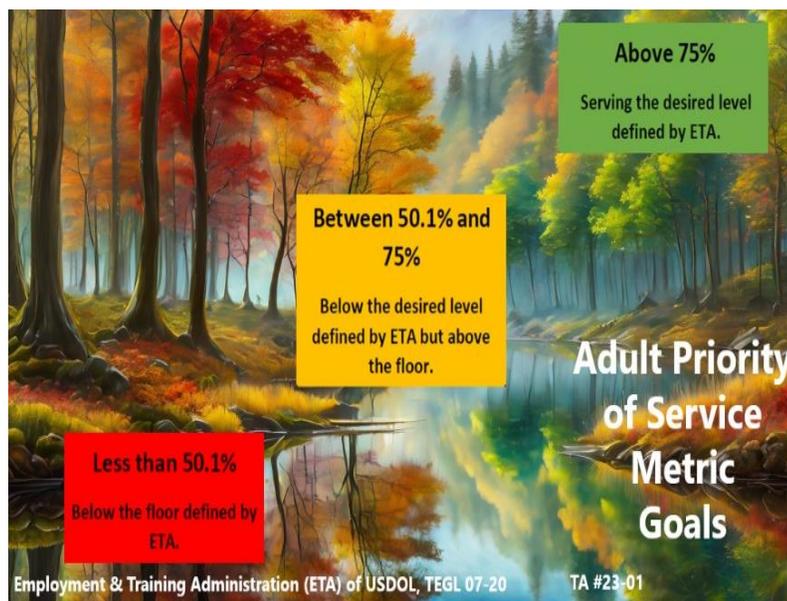
Watch [how to use the APOs customer lists video](#) and join the office hours with questions!

- Use the Values Legend to understand the data values.
- [Check if the customer could be a Dislocated Worker](#) (DW)
- Focus on customers in the second and third quarters of the rolling reporting period.
- Individuals with disability with personal low income are APOs
- [Basic Skills Deficient](#) also includes customers without HSD/E or Individualized Education Program (IEP)
- Make sure the APOs categories are entered in OSOS before entering individualized or training services

**Capture data entry insights from staff and do weekly spot-checks to not repeat the errors!**

# Leadership Tips for Staff Development for Quality Data Entry

- **Engage staff:** Ensure they grasp the impact of collecting accurate data at the time of enrollment for reports and the APoS metric. Keep communication open. Check in often. Communication is key!
- **Develop an expert:** Choose an OSOS-knowledgeable person for biweekly quality control reviews.
- **Check data entry:** Encourage staff to review their records and supervisors to spot-check enrollments.
- **Utilize OSOS List and Caseload Features:** Use these features for customer review, categorization, and supervisory oversight.
- **Learn from internal reviews:** Mistakes happen, and staff won't always have all the information they need from the customer. Focus on follow-up and communication. Report errors to the OSOS Help Desk.



Attend APoS Office Hours and reach out to [Help.OSOS@labor.ny.gov](mailto:Help.OSOS@labor.ny.gov) and QA Program monitor!

## Handouts & Resources

### Self-assessment for innovative leadership actions to take and rate yourself!

#### Data Management and Accuracy

- Legend that describes data values, OSOS data entry, and troubleshooting ideas for APoS Quarterly Reports
- [Video on how to use APoS Quarterly Reports to correct the data entry](#)
- Lists and Search by Staff Activities in OSOS in slides
- [OSOS guide on performing advanced customer searches](#)

#### Targeted Outreach and Partner Collaboration

- Reach More APoS Customers with Multi-Sector Partnerships
- Elevator Pitch for DSS in slides
- DSS Release from Herkimer County and Broome-Tioga
- [Workforce Café by Aspen Institute](#)

#### Staff Development and Recruitment

- Understanding APoS Metric Slides
- Leaders and staff take [Harvard's Implicit Bias Tests](#) and engage in discussions
- [APoS Technical Advisory #23-01](#)
- [Know individualized and training services in OSOS](#)
- [Example staff quiz on APoS from Niagara](#)

### [Resources from previous Workforce Synergy Forums](#)

(under the Workforce Synergy Forum filter)

APoS Customer List Office Hours from 3:30-4:30 pm [Zoom Registration](#)

# Shape the Synergy Forum & Take Initiative!



[Share your Workforce Synergy Forum impact or successes](#) with only two answers!

Email the [WIOA & Grants Admin Office](#) to:

- Be a local facilitator for the Synergy Forum on Mental Health Supportive Services on Apr 23.
- Join local & state-level workgroup to design a WIOA 101 Staff Toolkit.

## What's Workforce Synergy Forum?

As the leaders of WIOA Adult/DW Programs, we all face similar opportunities and thrive by asking questions, sharing practices, and learning from experts and our peers. Workforce Synergy is a monthly forum dedicated to exploring, developing, and sustaining effective workforce strategies. We will collectively build the synergy we want and need throughout 2024 and beyond. Leaders are encouraged to attend live for active, real-time collaboration!



Inspired? Questions? Collaborate! [LWDB@labor.ny.gov](mailto:LWDB@labor.ny.gov) | 518-457-3555

Brought to you by the WIOA Adult/Dislocated Worker Program Leaders and New York State Department of Labor



## Steps to Serve APoS Populations with Exceptional Customer Care

| Rate innovative leadership actions have you taken or plan to take!  | No<br>0 | Unsure<br>1 | Plan to<br>2 | Yes<br>4 | Resources   |
|---|---------|-------------|--------------|----------|---|
| <b>Data Management and Accuracy</b>   |         |             |              |          |   |
| Ensure staff know the flexible definitions of DW categories and fund customers aptly  |         |             |              |          | <a href="#">Eligibility and APoS Matrix</a>   |
| Align intake procedures with APoS requirements  |         |             |              |          | <a href="#">Initial Assessment TA #23-06</a>  |
| Clarify the flexible definitions of Basic Skills Deficiency and homelessness with staff for accurate assessment and data entry  |         |             |              |          | <a href="#">APoS TA #23-01</a>  |
| Support staff to know the importance of recording APoS criteria before enrolling in activities/services   |         |             |              |          | <a href="#">OSOS Selected Enrolling Activities Definitions</a>                            |
| Double check if the staff have accurate understanding of individualized and training services of Adult Program  |         |             |              |          | <a href="#">Example quiz from Niagara</a>   |
| Conduct spot checks on staff's weekly data entry for APoS   |         |             |              |          | <a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>                 |
| Collective group and cross-training of Title I and III staff about APoS data entry  |         |             |              |          | <a href="#">Creating a Basic Customer Record in OSOS</a>                                  |
| <b>Staff Recruitment and Training</b>   |         |             |              |          |   |
| Hire staff with similar backgrounds and experiences as the customers  |         |             |              |          | <a href="#">Staff resources from Niagara Team</a>   |
| Provide implicit bias and trauma-informed care training to staff  |         |             |              |          |   |
| Facilitate growth mindset and strengths-focused case management training for staff  |         |             |              |          |   |
| Host a training on cultural sensitivity, dos and don'ts for staff   |         |             |              |          |   |
| Take the Harvard Implicit Bias tests yourself. Have staff take Implicit bias tests and engage in discussions  |         |             |              |          |   |
| <b>Targeted Outreach and Partner Collaboration</b>  |         |             |              |          |   |
| Establish partnerships with organizations serving APoS populations to train our staff to build their capacity to effectively serve APoS populations   |         |             |              |          | <a href="#">Create Collaborative Service Models Interview with Indiana (WorkforceGPS)</a> |
| Initiate planned partnerships where staff hold office hours and workshops at organizations serving APoS   |         |             |              |          | <a href="#">Targeting Special Populations</a>   |
| Deliver presentations on Northstar digital literacy, transitional jobs, financial literacy workshops, supportive services, and other key tools and services to partners and their customers |         |             |              |          | <a href="#">Advancing Economic Mobility for Low-Income Families</a>                       |
| Support APoS partners to bring their customers for orientation and tours of the Career Centers  |         |             |              |          |   |
| Devise a plan with the leadership of partners to co-enroll, co-offer services, and co-case manage shared customers  |         |             |              |          |   |
| Facilitate targeted populations outreach & and communication responsive to the demographics of the unemployed and low-income workers in your area   |         |             |              |          | <a href="#">New Opportunities to Improve Economic and Career Success for Low-Income</a>   |
| Braid funds with partner programs as a financial necessity and customer service   |         |             |              |          |   |
| Establish multi-sector partnerships between key organizations within a community to provide comprehensive wrap-around services  |         |             |              |          | <a href="#">Minnesota Career Pathways On-Ramps</a>  |
| Form partnership for on-the-job training, transitional jobs, and other services with businesses willing to invest in local community and poverty reduction                                  |         |             |              |          | <a href="#">Alternative Employment Strategies for Hard-to-Employ TANF Recipients</a>      |
| <b>Your Total!</b>  |         |             |              |          |   |

**Your Leadership Action Plan to Improve Your Score from "Unsure" to "Yes!"**

## Reach More APOs Customers with Multi-Sector Partnerships

Meet the Indicators of Performance and APOs Metric of both WIOA and the organizations that you are partnering with<sup>(1)</sup>  
Get to know your mandated partners<sup>(2)</sup> to form more than the transactional, referral-based partnership.

| When you build partnerships with:   | You'll find people who:   | Per WIOA, likely could be:                        | Remember:  |
|---|---|---|--|
| <a href="#">Northstar Digital Literacy</a><br><a href="#">Adult Education Programs</a><br>Local Literacy Volunteers and Tutoring Organizations<br><a href="#">National External Diploma Programs</a><br>Refugee and immigrant agencies  | Need Digital literacy<br>Need high school equivalency<br>Want to improve their English  | <b>Basic Skills Deficient</b>                     | <ul style="list-style-type: none"> <li>• Universal Need for Digital Skills: Everyone requires essential digital skills, regardless of their background or circumstances.<sup>(3)</sup></li> <li>• Comprehensive Digital Literacy: Northstar offers self-paced modules for foundational and advanced digital literacy.</li> <li>• Lifelong Learning: Basic digital skills are acquired at different life stages, emphasizing continuous learning.</li> </ul>  |
| <a href="#">211</a><br><a href="#">Adult Career and Continuing Education Services- Vocational Rehabilitation (ACCES-VR)</a><br><a href="#">Community Action Programs</a><br><a href="#">Community Based Organizations</a><br><a href="#">Domestic Violence Prevention Programs</a><br><a href="#">Faith-Based Organizations</a><br><a href="#">Homeless Shelters</a><br><a href="#">Programs Serving Individuals At-Risk of or Experiencing Homelessness</a><br><a href="#">Centers of Independent Living</a><br><a href="#">Local District offices of DSS</a><br><a href="#">Section 8 Housing Authority</a><br><a href="#">SSI and SSDI offices</a> | Are at risk of or experiencing homelessness<br>Are couch surfing or with temporary, transient housing<br>Receive public assistance<br>Have disabilities and personal low-income<br>People with income under 70% LLSIL or LLS<br>Can help you connect with the community | <b>Low-Income or Public Assistance Recipients</b> | <ul style="list-style-type: none"> <li>• Economic Impact of High School Equivalency: Studies show higher earnings for workers with a high school equivalency.<sup>(4)</sup></li> <li>• Valuing Diverse Perspectives: Bilingual people who use more than two languages daily may think in both languages, and this makes them more capable of viewing the world differently. And they're likely to understand it better from different sides.<sup>(5)</sup></li> <li>• Resilience through Immigration: Immigration experiences cultivate resilience and unique strengths for customers.<sup>(6)</sup></li> <li>• Rise in Homelessness: The current number of individuals experiencing homelessness is the highest ever recorded since data reporting began in 2007.<sup>(7)</sup></li> <li>• Nature of Homelessness: Homelessness is a transient condition that can be addressed and resolved.</li> <li>• Widespread Food Insecurity: Approximately 1 in 10 adults face food insecurity.<sup>(8)</sup></li> <li>• Desire for Employment: Individuals have a strong desire to work and contribute to society.</li> <li>• Disparity in Unemployment: The unemployment rate for persons with disabilities is approximately double that of persons without disabilities.<sup>(9)</sup></li> <li>• Valuing the Contributions: People with disabilities play a crucial role in the workforce and should be recognized for their contributions.</li> <li>• Diversifying Outreach: It is beneficial to expand outreach beyond governmental organizations.<sup>(10)</sup></li> <li>• Safety Net: This leads to huge gains for the individuals seeking your help by raising the overall level of economic prosperity for the community.<sup>(10)</sup></li> </ul> |

[Leverage other resources to support WIOA Adult priority populations!](#)

[Implementing Priority of Service Provisions for Most in Need Individuals in the WIOA Adult Program \(WorkforceGPS Webinar on TEGL 7-20\)](#)

(1) Effective Implementation of Priority of Service Provisions for Most in Need Individuals in the WIOA Adult (TEGL 7-20)

(2) Mandated Partners (WIOA Regulations)

(3) Digital Inclusion: Targeted Strategies for Reaching Underserved Populations (WorkforceGPS)

(4) Why go to school? (dol.ny.gov)

(5) What Are the Benefits of Understanding Different Cultures? (LesElfes)

(6) The Strengths of Immigrant Students (harvard.edu)

(7) 2023 Annual Homelessness Assessment Report (hud.gov)

(8) Household Food Security in the United States in 2021 (usda.gov)

(9) Persons with a Disability: Labor Force Characteristics - 2022 (bls.gov)

(10) Targeting Special Populations (WorkforceGPS)



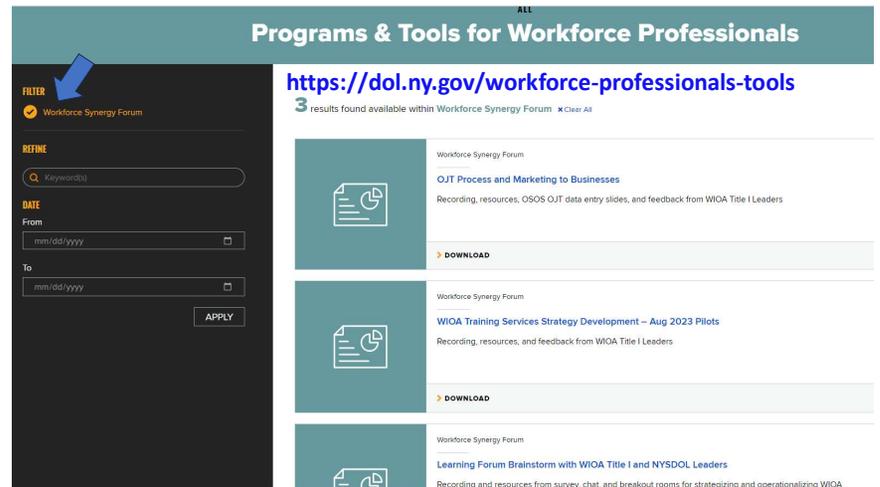
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## Which Follow-Up Resources Help You?

### OJT Synergy Resources:

- Slides
- Sample Checklists
- Outreach Materials
- Advice from Peers
- Recording
- OSOS Data Entry Steps



Share ideas to improve follow-up resources with [LWDB@labor.ny.gov](mailto:LWDB@labor.ny.gov)  
<https://dol.ny.gov/synergy-forum-resources-on-the-job-training.pdf>

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## Positive for APoS Metric Adult Program Customers with 1] AND 2] AND 3]

1] At or before the time of enrollment are one of the following categories  
 B] Basic Skills Deficient OR L] Low-income OR L/P] Public Assistance

**AND**

2] Received individualized and/or training services

**AND**

3] Exited in four quarter rolling reporting period

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## Positive for APoS Metric Exited Adult Program Customers who Received Individualized and/or Training Services

**AND**

**1] At or before the time of enrollment are one of the following categories B], L], OR L/P]**

**B] Basic Skills Deficient**

1. English Language Learners
2. No HSD/E or with an IEP diploma
3. Lack of digital literacy skills
4. Lack of functioning with English

**L] Low-income**

5. Homeless, including couch surfing
6. Individuals with Disability with individual low-income
7. Income under higher of 70% LLSIL or LLS
8. Foster care payments by state

**OR**

**L/P] Public Assistance (TANF, SNAP, GA, SSI, Local Programs, RCA, Safety Net, etc.)**

9. Receiving or received public assistance in the past six (6) months as an individual or part of a family

## Customers Not Included in APoS Metric

1. Dislocated Workers - [dol.ny.gov/eligibility-and-apos-matrix](https://dol.ny.gov/eligibility-and-apos-matrix)
2. Participants in programs other than the Adult Program
3. Adult customers who receive only basic services or self-service
4. Adult customers outside of rolling four quarters of reporting

## 5. Who else is not included in APoS?

## Customers Included in APoS Metric

Exited Adult Program customers  
who received individualized  
and/or training services

**(Remember if a customer is not DW then  
typically enrolled into Adult Program)**

## Individualized and Training Services

### L1 Services Definitions

| L1 - Staff Assisted Individualized |  |  |  |
|------------------------------------|--|--|--|
| Parallel                           | Service  | Definition   | Guidance   |
| Yes                                | LI Assessment - Comprehensive and Specialized Skill Levels/Service Needs | To record that the job seeker received a comprehensive and/or specialized assessment of his/her barriers to employment, occupation goal, along with the occupational knowledge, skills and abilities associated with that goal, and service needs. The service may include interpreting the results of assessment tools as well as in-depth interviewing and evaluation to identify employment barriers and appropriate employment goals. Comprehensive assessment is usually conducted after an initial assessment has taken place. | In COMMENTS, identify the assessment instrument used (interview, ability profile) and a summary statement that details the delivery, outcome and anticipation. |
| Yes                                | Career Guidance - Individualized (WSP)                                   | The provision of information, materials, suggestions, or advice which are intended to assist the job seeker in making occupational or career (vocational) decisions. Staff expends a significant amount of time and effort in helping the job seeker to analyze and understand his career information, identifying additional materials or information as necessary to help the job seeker refine his/her career goal.   | In COMMENTS, detail the significant factors of the career guidance. Use the SENSE model or comparable to organize session notes.                               |
| Yes                                | Counseling - Individual  | To record that the job seeker participated in a one-on-one counseling session with a professional counselor. The purpose of such sessions, whether one time only or on an ongoing basis, is to aid job seekers to gain a better understanding of themselves and their information gained through various assessment tools and/or strategies so that they can more rationally choose or change their occupation, or make suitable job adjustments.  | In COMMENTS, detail the significant factors of the career guidance. Use the SENSE model or comparable to organize session notes.                               |
| Yes                                | Counseling - Group   | To record that the job seeker participated in a group counseling session with a professional counselor. The purpose of such sessions, whether one time only or on an ongoing basis, is to aid job seekers to gain a better understanding of themselves using information gained  | In COMMENTS, detail the significant factors of the career guidance. Use the SENSE model or comparable to organize session notes.                               |

<https://dol.ny.gov/system/files/documents/2023/11/osos-selected-enrolling-activity-definitions-1.pdf>



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## What do you need to do to reach the target 75% APoS Rate? (Select All)

1. Clarity on data entry for staff
2. Staff training on cultural sensitivity
3. Helping staff see the value of initial assessment
4. Not enough partnerships or collaborations
5. Outreach and recruitment for APoS populations
6. Building staff skills to effectively serve APoS populations
7. Learning how to do data quality control

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## Leaders & Facilitators for Today!

Nicole Wilson, Employment & Training Director,  
 nwilson@herkimercounty.org

Craig Horowitz, Assistant Administrative Director,  
 craig.horowitz@suffolkcountyny.gov

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## Three Critical Aspects of Metric

- i) Which customers count **positively**?

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- ii) Which customers are **included**?
- iii) **Timing**

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## Three Critical Aspects of Metric

- Numerator: i) Which customers count **positively**?

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- Denominator: ii) Which customers are **included**?
- iii) **Timing**

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## Three Critical Aspects of Metric

- Numerator: Adults with individualized and/or training services + APoS categories at the time of enrollment
- i) Which customers count **positively**?

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- Denominator: Adults with individualized and/or training services
- ii) Which customers are **included**?
- iii) **Timing**

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## Three Critical Aspects of Metric

Numerator:

i) Which customers count **positively**?

Adults with individualized and/or training services +

APoS categories at the time of enrollment

Denominator:

ii) Which customers are **included**?

Adults with individualized and/or training services

iii) Timing

Four Rolling Quarters of the Reporting Period

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## Timing

Quarter Ending: **9/30/2023**

Program Year: **2023** Quarter: **1**

| Metric                              | Start     | End       |
|-------------------------------------|-----------|-----------|
| Participant Data:                   | 10/1/2022 | *Current  |
| APoS, Rolling Quarters, Exit Based: | 7/1/2022  | 6/30/2023 |

\*Current = Records with Exit Dates on or after Start Date PLUS participants with no Exit Date entered.

| 4/1/2021  | 7/1/2021  | 10/1/2021  | 1/1/2022  | 4/1/2022  | 7/1/2022  | 10/1/2022  | 1/1/2023  | 4/1/2023  | 7/1/2023 |
|-----------|-----------|------------|-----------|-----------|-----------|------------|-----------|-----------|----------|
| -         | -         | -          | -         | -         | -         | -          | -         | -         | -        |
| 6/30/2021 | 9/30/2021 | 12/31/2021 | 3/31/2022 | 6/30/2022 | 9/30/2022 | 12/31/2022 | 3/31/2023 | 6/30/2023 | Current  |
|           |           |            |           |           | <b>A</b>  | <b>B</b>   | <b>C</b>  | <b>D</b>  |          |

- A** First quarter of the rolling reporting period that will not be included in the next report for APoS
  - B** Second quarter of the rolling reporting period that must be prioritized for data correction for APoS
  - C** Third quarter when reporting rolling 4 quarters of APoS
  - D** Fourth quarter when reporting rolling 4 quarters of APoS
- PIRL reporting timeline at - [https://www.dol.gov/sites/dolgov/files/ETA/Performance/pdfs/PIRL\\_Reporting\\_Timelines.xlsx](https://www.dol.gov/sites/dolgov/files/ETA/Performance/pdfs/PIRL_Reporting_Timelines.xlsx)

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## APoS Customer Lists

Summary with totals of APoS Customers

| APoS Criteria | Column/Criteria                         | Description of data values noted for individual customers  | OSOS               | Transferring Issues |
|---------------|---|--|--------------------|---------------------|
| B             | Basic Skills Deficient (BSD)            | Basic Skills Deficient (BSD) - OSOS based on: Bad transcription in a system that uses English language, or other BSD criteria, as well as other criteria that are not related to the assessment. | Windows Copy Asses | Windows Copy Asses  |
| A             | High School Diploma or GED              | High School Diploma or GED - OSOS based on: Customer (Data Values) = "Yes" (0) = "No"  | Windows Copy Asses | Windows Copy Asses  |
| S             | Secondary Education                     | Secondary Education - OSOS based on: Customer (Data Values) = "Yes" (0) = "No"   | Windows Copy Asses | Windows Copy Asses  |
| E             | Employment                              | Employment - OSOS based on: Customer (Data Values) = "Yes" (0) = "No"  | Windows Copy Asses | Windows Copy Asses  |
| I             | Individualized and/or Training Services | Individualized and/or Training Services - OSOS based on: Customer (Data Values) = "Yes" (0) = "No"   | Windows Copy Asses | Windows Copy Asses  |

## Values Legend

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## Prioritize Data Corrections from APoS Customer Lists

1. Customers counting negative & are they DW?
2. 2<sup>nd</sup> and 3<sup>rd</sup> quarters in the rolling reporting period
3. Individuals with Disability with personal low-income
4. Not having an HSD/E or having IEP Diploma
5. Homelessness includes temporary housing or couch surfing
6. Lacking digital literacy skills

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| Steps to Serve APoS Populations with Exceptional Customer Care  |         |             |              |          |   |
|---|---------|-------------|--------------|----------|---|
| Which innovative leadership actions have you taken? Rate yourself!  | No<br>0 | Unsure<br>1 | Plan to<br>2 | Yes<br>4 | Resources   |
| <b>Data Management and Accuracy</b>   |         |             |              |          |   |
| Ensure staff know the flexible definitions of DW categories and fund customers apply  |         |             |              |          | <a href="#">Eligibility and APoS Matrix</a>   |
| Align intake procedures with APoS requirements  |         |             |              |          | <a href="#">Initial Assessment TA #23-06</a>  |
| Clarify the flexible definitions of Basic Skills Deficiency and homelessness with staff for accurate assessment and data entry                      |         |             |              |          | <a href="#">APoS TA #23-01</a>  |
| Support staff to know the importance of recording APoS criteria before enrolling in activities/services   |         |             |              |          | <a href="#">OSOS Selected-Enrolling Activities Definitions</a>                            |
| Double check if the staff have accurate understanding of individualized and training services of Adult Program                                      |         |             |              |          | <a href="#">Example quiz from Niagara</a>   |
| Conduct spot checks on staff's weekly data entry for APoS   |         |             |              |          | <a href="#">Comprehensive Assessment and Supplemental Data OSOS Guide</a>                 |
| Collective group and cross-training of Title I and III staff about APoS data entry  |         |             |              |          | <a href="#">Creating a Basic Customer Record in OSOS</a>                                  |
| <b>Staff Recruitment and Training</b>   |         |             |              |          |   |
| Hire staff with similar backgrounds and experiences as the customers  |         |             |              |          | <a href="#">Staff resources from Niagara Team</a>   |
| Provide implicit bias and trauma-informed care training to staff  |         |             |              |          |   |
| Facilitate growth mindset and strengths-focused case management training for staff  |         |             |              |          |   |
| Host a training on cultural sensitivity, dos and don'ts for staff   |         |             |              |          |   |
| Take the Harvard Implicit Bias tests yourself. Have staff take implicit bias tests and engage in discussions  |         |             |              |          | <a href="#">Harvard Implicit Bias Tests</a>   |
| <b>Targeted Outreach and Partner Collaboration</b>  |         |             |              |          |   |
| Establish partnerships with organizations serving APoS populations to train our staff to build their capacity to effectively serve APoS populations |         |             |              |          | <a href="#">Create Collaborative Service Models Interview with Indiana (WorkforceGPS)</a> |
| Initiate planned partnerships where staff hold office hours and workshops at organizations serving APoS   |         |             |              |          | <a href="#">Targeting Special Populations</a>   |

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## Targeted Outreach and Partner Collaboration



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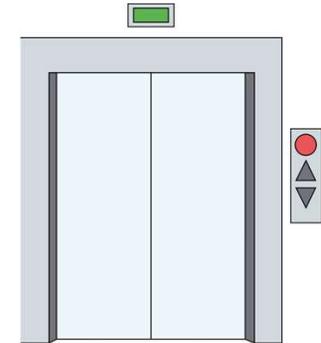
| Reach More APoS Customers with Multi-Sector Partnerships  |   |   |  |
|---|---|---|--|
| Meet the Indicators of Performance and APoS Metric of both WIOA and the organizations that you are partnering with <sup>(1)</sup><br>Get to know your mandated partners <sup>(2)</sup> to form more than the transactional, referral-based partnership.   |   |   |  |
| When you build partnerships with:   | You'll find people who:   | For WIOA, very likely could be:                   | Remember:  |
| <a href="#">Northstar Digital Literacy</a><br><a href="#">Adult Education Programs</a><br>Local Literacy Volunteers and Tutoring Organizations<br><a href="#">National Essential Diploma Programs</a><br>Refugee and immigrant agencies   | Need Digital Literacy<br>Need high school equivalency<br>Want to improve their English  | <b>Basic Skills Deficient</b>                     | <ul style="list-style-type: none"> <li>*Universal Need for Digital Skills: Everyone requires essential digital skills, regardless of their background or circumstances.<sup>(3)</sup></li> <li>*Comprehensive Digital Literacy: Northstar offers self-paced modules for foundational and advanced digital literacy.</li> <li>*Lifelong Learning: Basic digital skills are acquired at different life stages, emphasizing continuous learning.</li> <li>*Economic Impact of High School Equivalency: Studies show higher earnings for workers with a high school equivalency.<sup>(4)</sup></li> </ul>  |
| 211<br><a href="#">Adult Career and Continuing Education Services/ Vocational Rehabilitation (ACCES-VRS)</a><br><a href="#">Community Action Programs</a><br><a href="#">Community Based Organizations</a><br><a href="#">Domestic Violence Prevention Programs</a><br><a href="#">Faith-Based Organizations</a><br><a href="#">Homeless Shelters</a><br><a href="#">Programs Serving Individuals At-Risk of Experiencing Homelessness</a><br><a href="#">Centers of Independent Living</a><br>Local District Offices of DSS<br>Section 8 Housing Authority<br>SSI and SSDI offices | Are at risk of or experiencing homelessness<br>Are couch surfing or with temporary, transient housing<br>Receive public assistance<br>Have disabilities and personal low-income<br>People with income under 70% LLSL or LLSL<br>Can help you connect with the community | <b>Low-income or Public Assistance Recipients</b> | <ul style="list-style-type: none"> <li>*Valuing Diverse Perspectives: Bilingual people who use more than two languages daily may think in both languages, and this makes them more capable of viewing the world differently. And they're likely to understand it better from different sides.<sup>(5)</sup></li> <li>*Resilience through Immigration: Immigration experiences cultivate resilience and unique strengths for customers.<sup>(6)</sup></li> <li>*Rise in Homelessness: The current number of individuals experiencing homelessness is the highest ever recorded since data reporting began in 2007.<sup>(7)</sup></li> <li>*Nature of Homelessness: Homelessness is a transient condition that can be addressed and resolved.</li> <li>*Widespread Food Insecurity: Approximately 1 in 10 adults face food insecurity.<sup>(8)</sup></li> <li>*Desire for Employment: Individuals have a strong desire to work and contribute to society.</li> <li>*Disparity in Unemployment: The unemployment rate for persons with disabilities is approximately double that of persons without disabilities.<sup>(9)</sup></li> <li>*Valuing the Contributions: People with disabilities play a crucial role in the workforce and should be recognized for their contributions.</li> <li>*Diversifying Outreach: It is beneficial to expand outreach beyond governmental organizations.<sup>(10)</sup></li> <li>*Safety Net: This leads to huge gains for the individuals seeking your help by raising the overall level of economic prosperity for the community.<sup>(11)</sup></li> </ul> |

## WIOA Elevator Pitch to DSS

### Simple Eligibility

### Strong Free to Customer Services

- Transitional Jobs
- Occupational Skills Training
- Job Search Skills and Prep
- Job Fairs and Business Engagement
- Northstar Digital Literacy
- Virtual Reality Career Exploration
- Supportive Services and Follow-up



Ref: Alternative Employment Strategies for Hard-to-Employ TANF Recipients

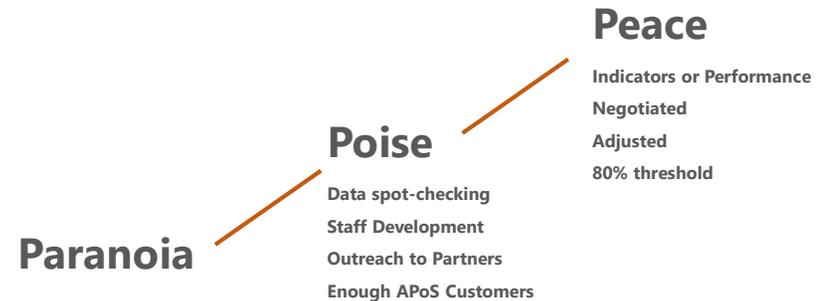
## WIOA Elevator Pitch to DSS to Practice

- Referral Forms
- Advisory Committees
- Co-enrollment
- Co-shared workshops, orientation tours
- Co-case management
- Integrated Resource Teams



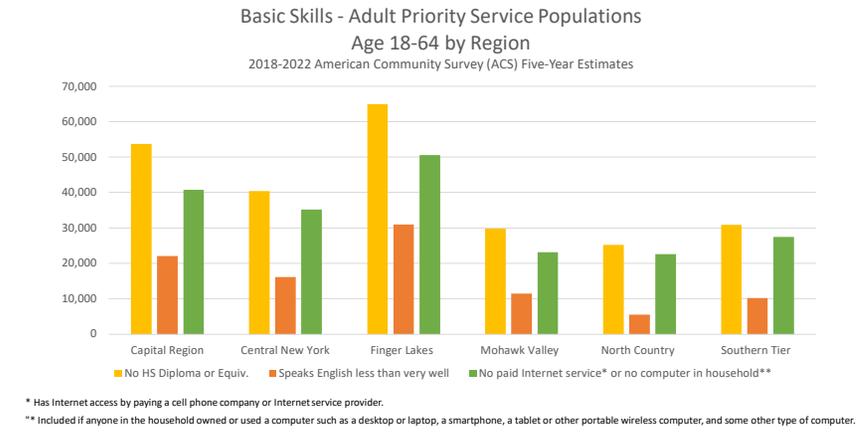
Ref: Alternative Employment Strategies for Hard-to-Employ TANF Recipients

## Indicators of Performance & APoS Metric

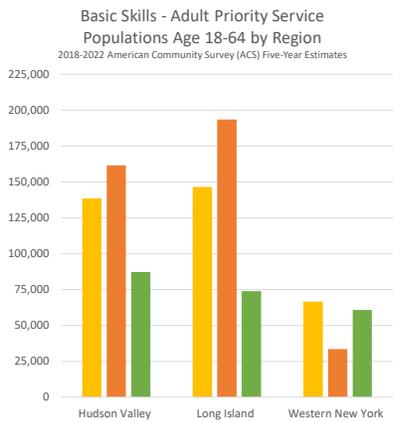




33

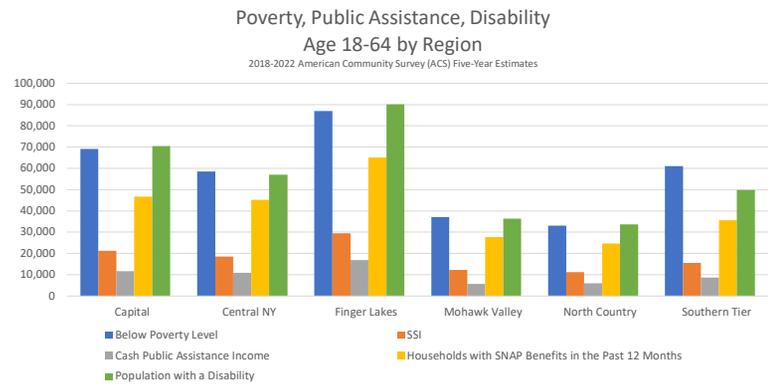
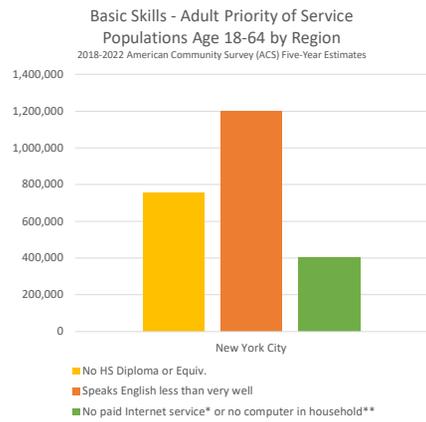


34

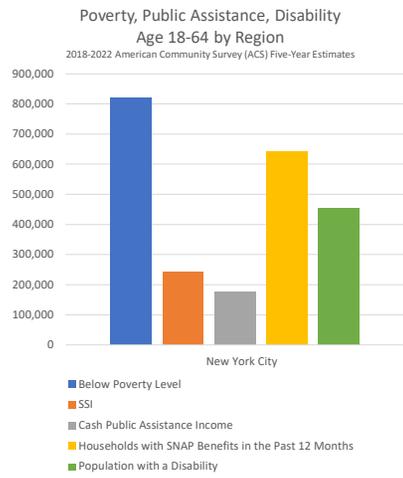
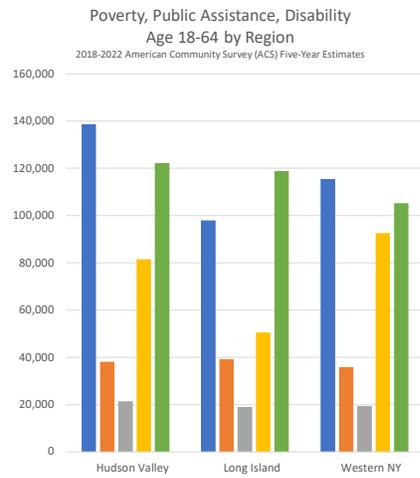


\* Has Internet access by paying a cell phone company or Internet service provider.  
 \*\* Included if anyone in the household owned or used a computer such as a desktop or laptop, a smartphone, a tablet or other portable wireless computer, and some other type of computer.

35



36



37

Mar 26, 2024,  
2:30pm

Basic Skills  
Assessments with  
North Country  
Facilitators

Workforce Synergy Forum

38

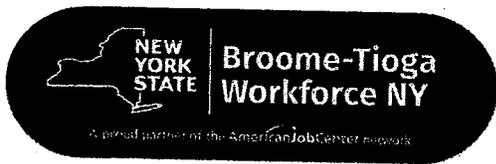
Adult Priority of  
Service Office Hours  
Next 3 Tuesdays March 5, 12, 19 from  
3:30-4:30pm

Need Local Facilitators  
for Mental Health  
Supportive Services

Share ideas to improve  
follow-up resources

Email:  
[LWDB@labor.ny.gov](mailto:LWDB@labor.ny.gov)

39



Broome-Tioga Workforce New York  
501 Reynolds Road, Johnson City, NY13790  
Phone 607-778-2136 \* Fax 607-778-3011

I, \_\_\_\_\_, hereby authorize the Broome Tioga Workforce/Broome County Office to release to or obtain from the Broome County Department of Social Services, any and all information pertaining to my enrollment with and services provided by either agency which Broome Tioga Workforce may find necessary to assist it in evaluating my eligibility and need for workforce services.

I understand that all such information will be treated as confidential and privileged, and used only for the purpose of effecting my employment training and/or search, except as necessary for the administration for Broome Tioga Workforce.

\_\_\_\_\_  
Participant's Social Security Number

\_\_\_\_\_  
Participant's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Counselor Name (Please Print)

Grant under name of \_\_\_\_\_

SN \_\_\_\_\_ TANF \_\_\_\_\_ SNAP # \_\_\_\_\_ Begin date of services: \_\_\_\_\_

Staff Name \_\_\_\_\_ Staff Phone number \_\_\_\_\_ Date \_\_\_\_\_

verified Date: \_\_\_\_\_ YES or NO Staff Initials \_\_\_\_\_

BROOME TIOGA WORKFORCE PROVIDES SERVICES WITHOUT REGARD TO RACE, CREED, COLOR, SEX, NATIONAL ORIGIN, AGE, TYPE OF DISABILITY, MARITAL STATUS, OR CRIMINAL RECORD.

DSS VERIFICATION - Amy Morgan

FAX 607-778-3705



## Tips for using individual customer information entered before entering the individualized and/or training service time of enrollment to correct APoS data

To keep the original data intact, in case there are errors in manipulating the data:

1. Save a copy of the file (APoS Report\_PY23Qx {LWDA Name}) as your working file.

The Customers Tab includes customers who received individualized or training services from the Adult Program and have exited in the listed time frame.

[Definitions of L1 Enrolling Activities](#)

To hide customers who are already counted positive for APoS:

2. Sort the "Numerator" column by the numerator equals zero ("0") check box.

When the data value is "1" in the Numerator column, the participant had at least one of the APoS categories.

A "0" represents that current data entry done at the time of enrollment placed the participant outside of the three (3) categories (basic skills deficient, low-income, and receiving public assistance) that count toward the APoS metric and should be reviewed.

To hide or disregard customers who will not be reported in the next quarterly report to the USDOL and bring up the customers who if updated now will improve positive APoS:

3. Sort data by exit dates with the Oldest to Newest filter.

4. Hide the customers from the first quarter of the rolling period as they will not be included in the next rolling four-quarter report.

For example, the PY23Q1 report:

i. Represents the quarter-ending 9/30/23.

ii. The exit cohort lags one quarter and therefore exiters are from 7/1/22-6/30/23.

iii. The first quarter of this rolling reporting period is 7/1/22-9/30/22 (shown as A in the Timeline tab). The exiters from this first quarter of the rolling reporting period will not be reported in the upcoming PY23Q2 report to the USDOL, so they should not be updated.

iv. The exiters from the second quarter 10/1/22-12/31/22 (shown as B in the Timeline tab) of this PY23Q1 report should be prioritized for data entry corrections as this quarter will be included in the PY23Q2 report and will be dropped off from the PY23Q3 report.

v. As data entry of all the last three (3) quarters from the rolling reporting period are double-checked and new customers are entered accurately, the list will shorten.

The Timeline tab in this sheet is modified from the Participant Individual Record Layout (PIRL) reporting timeline at - [https://www.dol.gov/sites/dolgov/files/ETA/Performance/pdfs/PIRL\\_Reporting\\_Timelines.xlsx](https://www.dol.gov/sites/dolgov/files/ETA/Performance/pdfs/PIRL_Reporting_Timelines.xlsx).

*For the next quarter's report, NYSOL will complete steps 2-4 of your customer APoS data file to hide the first quarter of the four-quarter rolling period of the APoS exit-based metric.*

To find the errors or missed aspects of data entry:

5. Check OSOS comments, other relevant paper files, and ES101 and ES102 intake forms to determine if any of the APoS category was missed while entering the customer's information at the time of enrollment, and hence have been marked "0" in the individual customer data.

To update the data entry:

6. If the customer met the APoS category at the time of enrollment then update their information in OSOS; and email the OSOS Help Desk (Help.OSOS@labor.ny.gov) with their OSOS ID and the field that needs to be updated before the time of enrollment, including which enrollment period needs correction.

7. If the customer should have been funded by Dislocated Worker (DW) funding instead of the Adult program for Functionally Aligned Service then 1) update the OSOS record to reflect DW status and email the Help Desk with OSOS ID and request to update the funding enrollment snapshot. This change of funding will remove them from the denominator of the APoS metric as they are in the DW program.

[To verify the DW category use Eligibility & APoS Matrix](#)

To not repeat the errors:

8. Compile insights gathered from this data correction adventure.

9. Share your insights from data correction with other staff members and email LWDB@labor.ny.gov and Help.OSOS@labor.ny.gov to help others improve their data entry.

### References:

[Technical Advisory #23-01: Serving Priority Populations and Priority of Service & Attachment A: Key Terms and Definitions](#)

[Creating a Basic Customer Record in OSOS](#)

[Comprehensive Assessment and Supplemental Data OSOS Guide](#)

[Technical Advisory #23-06: Initial Assessment in the Career Center System](#)

[Technical Advisory #23-03: Data Element Validation](#)

[Video Instructions to use this APoS Customer List](#)

## Adult Priority of Service (APoS) Metric

At a minimum, 50.1% to 75%+ of individuals who receive individualized or training services from WIOA Adult Program funding must meet one of the following category before the time of enrollment

| APoS Category | Columns in Customer Lists/Category<br>(If customers listed as...) | Description of data values noted for individual customers<br><small>Technical Advisory #23-01</small><br>(the customers must be recorded at the time of enrollment as...) | OSOS<br>New Customer Record and Comprehensive Assessment<br>OSOS Guides<br>(In these fields of OSOS for APoS) | Troubleshooting<br>Technical Advisory #23-03<br>(Investigate data entry and DEV) |
|---------------|---|---|---|--|
|---------------|---|---|---|--|

### BASIC SKILLS (Category B.a to B.c listed below)

|   |  |   |  |  |
|---|--|---|--|--|
| B<br>A<br>S<br>I<br>C<br><br>S<br>K<br>I<br>L<br>L<br>S | <b>Basic Skills Deficient (BSD)</b><br><small>Customer Data Value: 1</small>         | <b>Basic Skills Deficient (BSD) - OSOS, based on:</b><br><b>B.a) functioning in a society that uses English language, or other BSD category, e.g. lacking digital literacy skills determined using skills assessment:</b><br><a href="https://dol.ny.gov/basic-skills-assessment/">https://dol.ny.gov/basic-skills-assessment/</a><br>Customer Data Values: 1 = Yes 0 = No  | <b>Basic Skills Deficient -</b><br>Window: Comp Assess<br>Tab: Education<br>Section: Math & Reading<br>Field: Basic Skills Deficient + Comment   | Is the education level so low that they might be BSD?<br><br>Are there any clues here that the person might be BSD or ELL? It could be that BSD/ELL was added after enrollment. Sometimes you'll find details in the training information area |
|   | <b>No HS Diploma or Equivalency</b><br><small>Customer Data Value: 0 &amp; 3</small> | <b>B.b) Basic Skills Deficient also includes customers without High School Diploma/Equivalency (HSD/E).</b><br>Customer Data Values:<br>0 = No Educational Level Completed<br>3 = The participant with a disability receives a certificate of attendance/completion as a result of successfully completing an Individualized Education Program (IEP)<br>Other Not Applicable Data Values:<br>1 = Attained secondary school diploma<br>2 = Attained a secondary school equivalency<br>4 = Completed one of more years of postsecondary education;<br>5 = Attained a postsecondary tech. or voc. certificate (non-degree)<br>6 = Attained an Associate's degree<br>7 = Attained a Bachelor's degree<br>8 = Attained a degree beyond a Bachelor's degree | <b>1) Education Level -</b><br>Window: Customer Detail<br>Tab: Gen. Info tab<br>Section: Education & Employment<br>Field: Education Level + Comment<br><br><b>AND</b><br><br><b>2) Basic Skills Deficient -</b><br>Window: Comp Assess<br>Tab: Education<br>Section: Math & Reading<br>Field: Basic Skills Deficient + Comment |  |
|   | <b>English Language Learner</b><br><small>Customer Data Value: 1</small>             | <b>B.c) Basic Skills Deficient also includes English Language Learner</b><br>Customer Data Values:<br>1 = Yes<br>0 = No   | <b>English Language Learner- Basic Skills Deficient -</b><br>Window: Comp Assess<br>Tab: Education<br>Section: Math & Reading<br>Field: English Language Learner + Comment   |  |

#### Adult Priority of Service (APoS) Metric =

Positive for the metric (numerator): Adult Program customers who are APoS populations before the time of enrollment and who received individualized and/or training services before exiting from the program within the four rolling reporting quarters

Included in the metric (denominator): All exited Adult Program customers who received individualized and/or training service and exited in the four rolling reporting quarters

## Adult Priority of Service (APoS) Metric

At a minimum, 50.1% to 75%+ of individuals who receive individualized or training services from WIOA Adult Program funding must meet one of the following category before the time of enrollment

| APoS Category | Columns in Customer Lists/Category<br>(If customers listed as...) | Description of data values noted for individual customers<br><small>Technical Advisory #23-01</small><br>(the customers must be recorded at the time of enrollment as...) | OSOS<br>New Customer Record and Comprehensive Assessment<br>OSOS Guides<br>(In these fields of OSOS for APoS) | Troubleshooting<br>Technical Advisory #23-03<br>(Investigate data entry and DEV) |
|---------------|---|---|---|--|
|---------------|---|---|---|--|

### LOW INCOME (Category L.a to L.f listed below)

|   |   |  |   |  |
|---|---|--|---|--|
| L<br>O<br>W<br><br>I<br>N<br>C<br>O<br>M<br>E | Income lower than higher of Lower Living Standard (LLS) or 70% Lower Living Standard Income Level (LLSIL) | <p><b>L.a) Low income based on income levels</b><br/>Not included in this spreadsheet as individual customer data.</p>   | <p><b>Income Info-</b><br/>Window: Customer Detail<br/>Tab: Eligibility tab<br/>Section: Income Info<br/>Field: Select "Yes" for higher of LLS or 70%LLSIL and no for other + Comment</p>   | <p>Are any of the low income boxes checked now? Is it possible that they were checked after the enrollment snapshot was taken and that's why this person isn't appearing on the APoS as low income? Check enrollment snapshot (Services window, Service History tab, click most recent WIA Enrollment and then click on Detail button to see what information was captured in OSOS at the time of enrollment).</p> |
|   | Disability<br><small>Customer Data Value: 1</small>   | <p><b>L.b) Low income includes an individual with a disability with personal (not family) income that does not exceed the higher of 70%LLSIL or LLS. An individual with a disability does not automatically meet low-income category.</b></p> <p>Customer Data Values:<br/>Customer data only on individuals with a disability (ies):<br/>1 = Yes<br/>0 = No<br/>9 = Participant did not self-identify</p> <p><i>The customer must be marked Yes in the poverty line or 70%LLSIL column and the disability column.</i></p> | <p><b>Disability Info-</b><br/>Window: Customer Detail<br/>Tab: Eligibility tab<br/>Section: Disability Info<br/>Field: Status &amp; Category + Comment</p> <p><b>AND</b></p> <p><b>Income Info-</b><br/>Window: Customer Detail<br/>Tab: Eligibility tab<br/>Section: Income Info<br/>Field: Select "Yes" for higher of LLS or 70%LLSIL and no for the other + Comment</p> | <p>Is the person with a disability and their family income is considered when actually their personal income should be considered under higher of low-income 70% LLSIL or LLS?</p> <p>If "customer below appropriate grade level" or "learning disabilities" have been checked, is the person possibly have a disability?</p>  |
|   | Foster Care<br><small>Customer Data Value: 1</small>  | <p><b>L.c) Low-income foster child (could be up to age 24) who receives state foster payments:</b></p> <p>Customer Data Values:<br/>1 = Yes<br/>0 = No</p> <p><i>Consider co-enrollment in the Adult and Youth Program.</i></p>  | <p><b>Foster Care -</b><br/>Window: Comprehensive Assessment<br/>Tab: Housing<br/>Section: Housing Information<br/>Field: Current Housing, Foster Child + Comment</p>   | <p>Do they have no work history, were they providing unpaid services in the home, were they working but earning very little – maybe working part time? Should they have been a Dislocated Worker (DW) instead of an Adult (A)?</p> <p>Are they homeless or in foster care? Was this entered at the time of enrollment or after?</p>  |
|   | Homeless<br><small>Customer Data Value: 1</small>   | <p><b>L.d) Homeless also includes a person couch surfing or having temporary housing</b></p> <p>Customer Data Values:<br/>1 = Yes<br/>0 = No</p>   | <p><b>Homeless -</b><br/>Window: Comprehensive Assessment<br/>Tab: Housing<br/>Section: Housing Information<br/>Field: Current Housing, Homeless + Comment</p>  | <p>Do Comments indicate APoS at the time of enrollment?</p>  |

## Adult Priority of Service (APoS) Metric

At a minimum, 50.1% to 75%+ of individuals who receive individualized or training services from WIOA Adult Program funding must meet one of the following category before the time of enrollment

| APoS Category  | Columns in Customer Lists/Category<br>(If customers listed as...)  | Description of data values noted for individual customers<br><small>Technical Advisory #23-01</small><br>(the customers must be recorded at the time of enrollment as...)   | OSOS<br>New Customer Record and Comprehensive Assessment<br>OSOS Guides<br>(In these fields of OSOS for APoS)   | Troubleshooting<br>Technical Advisory #23-03<br>(Investigate data entry and DEV) |
|--|--|---|---|--|
| <b>L<br/>O<br/>W<br/>I<br/>N<br/>C<br/>O<br/>M<br/>E</b> | <b>SSI or SSDI</b><br><small>Data Values: 1, 2, 3, 4, 5, 6</small> | <p><b>L.f) Receives, or in the past six (6) months has received, or is a member of a family that is receiving or in the past six (6) months has received, assistance through Social Security Income (SSI) and Social Security Disability Income (SSDI)</b></p> <p>Customer Data Values:<br/>                     1 = SSI<br/>                     2 = SSDI, does not make a customer automatically 70%LLSL or LLS<br/>                     3 = Both SSI and SSDI<br/>                     4 = SSI and Ticket Holder<br/>                     5 = SSDI and Ticket Holder. SSDI does not make a customer automatically 70%LLSIL or LLS<br/>                     6 = Both SSI and SSDI and A Ticket Holder<br/>                     0 = No</p> | <p><b>Public Assistance -</b><br/>                     Window: Customer Detail<br/>                     Tab: Prgms/PA<br/>                     Section: Current Public Assistance<br/>                     Field: Specific Public Assistance Program with Registration date and Termination date, if applicable + Comment</p> | <p>Do Comments indicate APoS at the time of enrollment?</p>                      |
|  | <b>TANF, SNAP, GA, RCA</b><br><small>Data Value: 1</small>         | <p><b>L.e) Receives, or in the past six (6) months has received, or is a member of a family that is receiving or in the past six (6) months has received, assistance through Temporary Assistance for Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP), General Assistance (GA), or Refugee Cash Assistance (RCA)</b></p> <p>Customer Data Values:<br/>                     1 = Yes<br/>                     0 = No</p>  |   |  |
|  | <b>Other Local, State, and Federal Income Based Programs</b>       | <p><b>L.g) Receives, or in the past 6 months has received, or is a member of a family that is receiving or in the past 6 months has received, assistance through local or state income-based program.</b></p> <p><i>Local income-based public assistance programs may be used to determine whether someone is low-income. Local Workforce Development Boards (LWDBs) must include these local income-based public assistance programs in their local Adult Priority of Service policy.</i></p>  |   |  |

### Adult Priority of Service (APoS) Metric =

Positive for the metric (numerator): Adult Program customers who are APoS populations before the time of enrollment and who received individualized and/or training services before exiting from the program within the four rolling reporting quarters

Included in the metric (denominator): All exited Adult Program customers who received individualized and/or training service and exited in the four rolling reporting quarters

## Check for Understanding – Adult Priority Populations Metric

As of 2023, at least 50.1% of Adults receiving Individualized Career Services or Training must meet the Adult Priority Population metric with appropriate OSOS entries. The goal is to serve those with Barriers to Employment.

1. Customer uses Career Center, receives Individualized Career Service - Career Guidance. Customer is classified as DW. Are they in the metric?
2. Customer uses Career Center, receives Individualized Career Service - Test Administration. Customer does not receive an Initial Assessment. Customer is not a DW or a Youth. Are they in the metric?
3. WIOA Adult customer receives Initial Assessment but only receives Basic Career Services (no Individualized Career Services). Are they in the metric?
4. WIOA Adult customer receives Self Service for using the Resource Room (no Individualized Career Services). Are they in the metric?
5. WIOA Youth customer receives WIOA Youth Training. Are they in the metric?
6. WIOA DW customer receives WIOA Training. Are they in the metric?
7. WIOA Adult customer receives WIOA OJT. Are they in the metric?
8. WIOA Adult customer receives WIOA Classroom Training. Are they in the metric?
9. WIOA Adult customer receives Customized Training. Are they in the metric?
10. Are WIOA Adult Training and Individualized Career Services all counted as one group for the performance metric?

## Answers

1. Not in the metric. Only Adults are in the metric and customer is a Dislocated Worker.
2. Yes, in the metric. Is an Adult who received an Individualized Career Service (ICS). Email [bonnie.rice@niagaracounty.com](mailto:bonnie.rice@niagaracounty.com) with the NY#, Adult status, and Yes-meets the Priority metric, or No-does not meet the Priority metric but received ICS.
3. Not in the metric. Is an Adult, but did not receive an Individualized Career Service or Training.
4. Not in the metric. Is an Adult, but did not receive an Individualized Career Service or Training.
5. Not in the metric. Is not an Adult.
6. Not in the metric. Is not an Adult.
7. Yes, in the metric. Is an Adult who received Training.
8. Yes, in the metric. Is an Adult who received Training.
9. Yes, in the metric. Is an Adult who received Training.
10. Yes, Training and Individualized Career Services are all in one group, counted together, towards one performance metric.

# WE ARE YOUR DOL



Department  
of Labor

## OSOS Customer List Feature

February 2024

# HOW TO CREATE A LIST

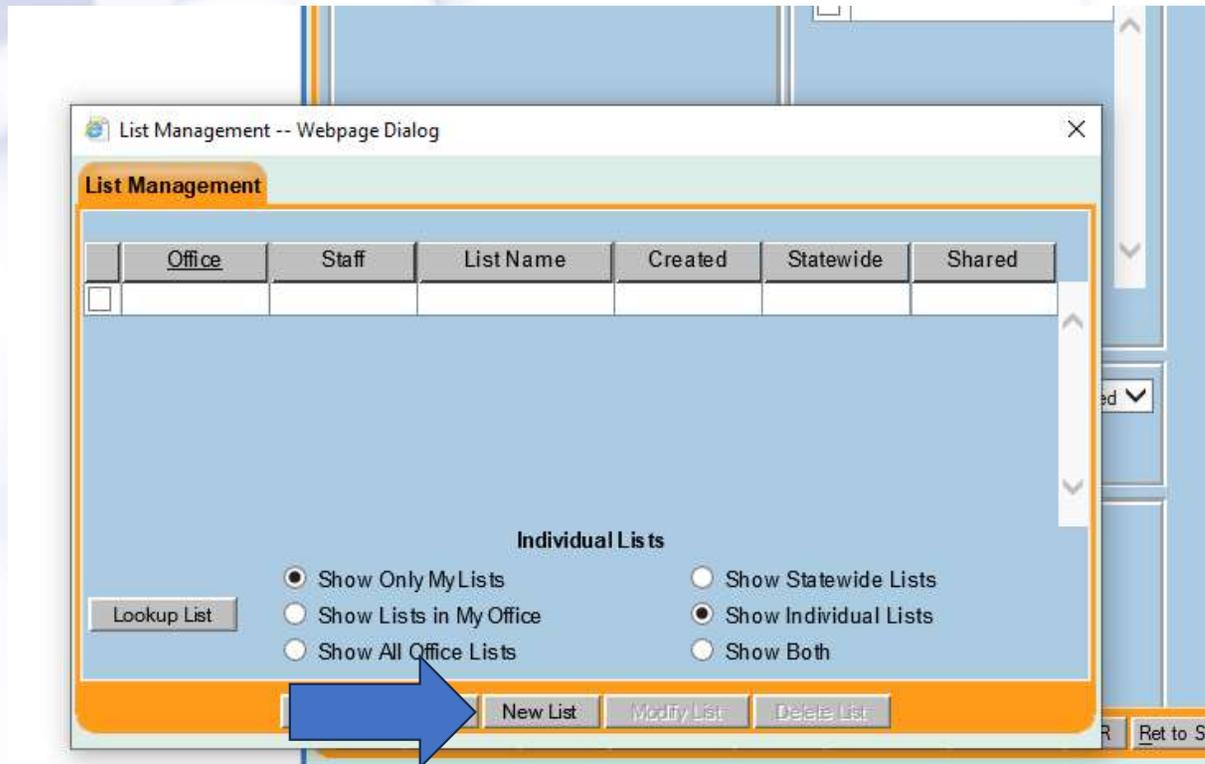
The screenshot displays a web application interface for customer management. The main navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, a secondary navigation bar contains links for Customer Search, Customer Detail (highlighted), Comp Assess, Services, Links, JobZone, and NextGen. The customer's name is 'Outcomes, Stewy', with SSN: \*\*\*-\*\*-4242 and OSOS ID: NY016818917. The page is labeled '1 of 1'.

The main content area is divided into several sections:

- Military Service:** A dropdown menu for 'Service Veteran' is set to 'No'.
- Customer List Participation:** A table with a header 'List Name' and a single empty row. Below the table are buttons for 'Assign To List' and 'Remove'. A blue arrow points to the 'Assign To List' button.
- Selective Service:** A dropdown menu for 'Selective Service?' is set to 'Not Required'.
- Employment Preferences:** Fields for 'Work Week', 'Duration', 'Salary', 'Pay Unit' (set to 'Hourly'), and 'Date Available'.
- Shift Preference:** Radio buttons for 'Work Any Shift' (Yes/No), and checkboxes for 'First Shift', 'Second Shift', 'Third Shift', 'Split Shift', and 'Rotating Shift'.

At the bottom, a toolbar contains buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.

# HOW TO CREATE A LIST



# HOW TO CREATE A LIST

**List Management -- Webpage Dialog**

**List Manager**

**Add/Modify List -- Webpage Dialog**

**Add/Modify List**

List Name

Office OSOS/ REOS Central Sup

Staff  NELSON, JORDAN Assign ▾

Date Created

Date Modified

Notes

Statewide List

Allow others to change list attributes

Save Cancel

# ADDING A CUSTOMER TO THE LIST

The screenshot shows a 'List Management' dialog box with a table and several controls. A blue arrow points to the 'Lookup List' button, and another blue arrow points to the 'New List' button.

|                                     | Office    | Staff        | List Name     | Created | Statewide | Shared |
|-------------------------------------|-----------|--------------|---------------|---------|-----------|--------|
| <input checked="" type="checkbox"/> | OSOS/REOS | CNELSON, JOR | Training Test |         | Yes       | Yes    |

**Individual Lists**

- Show Only My Lists
- Show Lists in My Office
- Show All Office Lists
- Show Statewide Lists
- Show Individual Lists
- Show Both

Buttons:

**CUSTOMER**   **PROVIDER**   **EMPLOYER**   **STAFF**   **HELP**

Customer Search   **Customer Detail**   Comp Assess   Services   Links   JobZone   NextGen

Outcomes, Stewy   SSN: \*\*\*-\*\*-4242   OSOS ID: NY016818917   1 of 1

Gen. Info   Eligibility   **Add'l Info**   Pgms/PA   Objective   Work Hist.   Ed/Lic   Skills   Saved Searches   Activities   Comments   Te >>

**Military Service**

• Service Veteran  ▼

**Customer List Participation**

| List Name   |
|---|
| <input checked="" type="checkbox"/> Training Test |

Assign To List   Remove

**Employment Preferences**

Work Week  ▼

Duration  ▼

Salary

Pay Unit  ▼

Date Available

**Selective Service**

• Selective Service?  ▼

**Shift Preference**

Work Any Shift  Yes  No

First Shift

Second Shift

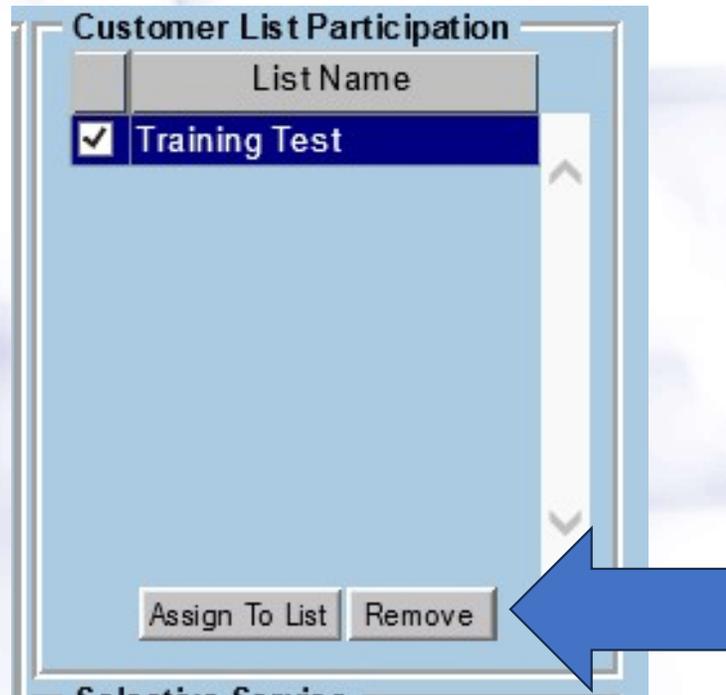
Third Shift

Split Shift

Rotating Shift

Save   Start Match   Services   Comp Assess   Activity   I.A. Referrals   Correspond   IVR   Ret to Srch   Comments   Tag   Resume   Sched   Message

# REMOVING A CUSTOMER FROM A LIST



# SEARCH FOR CUSTOMERS IN A LIST

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links JobZone NextGen

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

1 - 15 of 15

| <input type="checkbox"/>            | Office               | Staff                         | ListName      | Created    | Statewide | Shared |
|-------------------------------------|----------------------|-------------------------------|---------------|------------|-----------|--------|
| <input type="checkbox"/>            | OSOS/REOS Central Su | KLINE, REBECCA                | CMA           | 05/29/2018 | No        | No     |
| <input type="checkbox"/>            | OSOS/REOS Central Su | KLINE, REBECCA                | Employed      | 05/29/2018 | No        | No     |
| <input type="checkbox"/>            | OSOS/REOS Central Su | KLINE, REBECCA                | HPOG          | 05/29/2018 | No        | No     |
| <input checked="" type="checkbox"/> | OSOS/REOS Central Su | NELSON, JORDAN                | Training Test | 02/09/2024 | Yes       | Yes    |
| <input type="checkbox"/>            | OSOS/REOS Central Su | REOHR, DANIEL                 | List          | 02/09/2022 | No        | No     |
| <input type="checkbox"/>            | OSOS/REOS Central Su | zzzVan Valkenburg, Pat (Inact | PaFs List     | 03/25/2008 | No        | No     |

**Individual Lists**

Show Only My Lists
 Show Lists in My Office
 Show All Office Lists
 MyCase Load
 Show Statewide Lists
 Show Individual Lists
 Show Both

When searching, retrieve records found in:

Any list selected  
 All lists selected

| <input type="checkbox"/> | OSOS ID | Vet | Status | Seeker Name | WMOA | Rpt Indiv | Ad/DWRR/N | IWT | TAA | LX |
|--------------------------|---------|-----|--------|-------------|------|-----------|-----------|-----|-----|----|
| <input type="checkbox"/> |         |     |        |             |      |           |           |     |     |    |

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



**CUSTOMER**   **PROVIDER**   **EMPLOYER**   **STAFF**   **HELP**

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

1 - 15 of 15

| <input type="checkbox"/>            | Office               | Staff                         | ListName      | Created    | Statewide | Shared |
|-------------------------------------|----------------------|-------------------------------|---------------|------------|-----------|--------|
| <input type="checkbox"/>            | OSOS/REOS Central Su | KLINE, REBECCA                | CMA           | 05/29/2018 | No        | No     |
| <input type="checkbox"/>            | OSOS/REOS Central Su | KLINE, REBECCA                | Employed      | 05/29/2018 | No        | No     |
| <input type="checkbox"/>            | OSOS/REOS Central Su | KLINE, REBECCA                | HPOG          | 05/29/2018 | No        | No     |
| <input checked="" type="checkbox"/> | OSOS/REOS Central Su | NELSON, JORDAN                | Training Test | 02/09/2024 | Yes       | Yes    |
| <input type="checkbox"/>            | OSOS/REOS Central Su | REOHR, DANIEL                 | List          | 02/09/2022 | No        | No     |
| <input type="checkbox"/>            | OSOS/REOS Central Su | zzzVan Valkenburg, Pat (Inact | Pafs List     | 03/25/2008 | No        | No     |

**Individual Lists**

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

Show Statewide Lists  
 Show Individual Lists  
 Show Both

When searching, retrieve records found in:

Any list selected  
 All lists selected

| <input type="checkbox"/>            | OSOS ID     | Vet | Status | Seeker Name     | W/OA     | RptIndiv | Ad/DW/RR/N | IWT | TAA | LX       |
|-------------------------------------|-------------|-----|--------|-----------------|----------|----------|------------|-----|-----|----------|
| <input type="checkbox"/>            | NY016769619 | No  | Active | Kyle, Selina    | Inactive | Inactive | Inactive   |     |     | Inactive |
| <input checked="" type="checkbox"/> | NY016818917 | No  | Active | Outcomes, Stewy |          |          |            |     |     |          |

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

**CUSTOMER**   **PROVIDER**   **EMPLOYER**   **STAFF**   **HELP**

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

1 - 15 of 15

| <input type="checkbox"/>            | Office               | Staff                         | ListName      | Created    | Statewide | Shared |
|-------------------------------------|----------------------|-------------------------------|---------------|------------|-----------|--------|
| <input type="checkbox"/>            | OSOS/REOS Central Su | KLINE, REBECCA                | CMA           | 05/29/2018 | No        | No     |
| <input type="checkbox"/>            | OSOS/REOS Central Su | KLINE, REBECCA                | Employed      | 05/29/2018 | No        | No     |
| <input type="checkbox"/>            | OSOS/REOS Central Su | KLINE, REBECCA                | HPOG          | 05/29/2018 | No        | No     |
| <input checked="" type="checkbox"/> | OSOS/REOS Central Su | NELSON, JORDAN                | Training Test | 02/09/2024 | Yes       | Yes    |
| <input type="checkbox"/>            | OSOS/REOS Central Su | REOHR, DANIEL                 | List          | 02/09/2022 | No        | No     |
| <input type="checkbox"/>            | OSOS/REOS Central Su | zzzVan Valkenburg, Pat (Inact | Pafs List     | 03/25/2008 | No        | No     |

**Individual Lists**

Lookup List

- Show Only My Lists
- Show Lists in My Office
- Show All Office Lists
- MyCase Load
- Show Statewide Lists
- Show Individual Lists
- Show Both

When searching, retrieve records found in:

- Any list selected
- All lists selected

| <input type="checkbox"/>            | OSOS ID     | Vet | Status | Seeker Name     | W/OA     | RptIndiv | Ad/DW/RR/N | IWT | TAA | LX       |
|-------------------------------------|-------------|-----|--------|-----------------|----------|----------|------------|-----|-----|----------|
| <input type="checkbox"/>            | NY016769619 | No  | Active | Kyle, Selina    | Inactive | Inactive | Inactive   |     |     | Inactive |
| <input checked="" type="checkbox"/> | NY016818917 | No  | Active | Outcomes, Stewy |          |          |            |     |     |          |

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



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## SEARCHING BY ACTIVITY

February 2024

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PROVIDER

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HELP

Customer Search

Customer Detail

Comp Assess

Services

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JobZone

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Text Search

Geographic

Activities

Programs

List Search

Reports

>

>>

Select Test Type

Activities

Assessment Interview, Initial Assessment [L

Activity

Staff

KLIN, REBECCA

From 01/01/2017

Thru 03/09/2017

Activities

Staff

Literacy/Numeracy Tests

Test Exists

Pre-Test Date From

Thru

Post-Test Date From

Thru

| <input type="checkbox"/> | OSOS ID | Seeker Name | SSN | Email | Phone | DOB |
|--------------------------|---------|-------------|-----|-------|-------|-----|
| <input type="checkbox"/> |         |             |     |       |       |     |

<

>

Options

Search

▼

Clear

Detail

Asgn. to List

Add to CL

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Assessment Interview, Initial Assessment [L

KLINE, REBECCA

Activity

Staff

From 01/01/2017

Thru 03/09/2017

Activities

Staff

Literacy/Numeracy Tests

Test Exists

Pre-Test Date From Thru

Post-Test Date From Thru

| <input type="checkbox"/> | First Name | County | Edu. Level             |     |
|--------------------------|------------|--------|------------------------|-----|
| <input type="checkbox"/> | JOSE       | Albany | 12 Grade - no Diploma  | Not |
| <input type="checkbox"/> | KELLY      | Albany | 12 Grade - HS Graduate | Not |
| <input type="checkbox"/> | JOHN       | Albany | 12 Grade - HS Graduate | Not |

Options

Search

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Detail

Assign. to Lis

Add to CL

Post Match

Refer

Activity

P/PA

Comments

Correspond

IVR

New

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