Disability Employment Initiative (DEI)
Round 6
OSOS Guide
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PURPOSE
On September 17, 2015, the United States Department of Labor Employment & Training Administration (USDOL ETA) awarded NYSDOL with a Sixth Round of DEI funding totaling $2.5M. It will staff four Disability Resource Coordinators (DRCs) in two local areas: Capital Region and Herkimer/Madison/Oneida (HMO). This grant, entitled “Pathways to Employment,” focuses on the Career Pathways model of disability employment. It has over $700,000 earmarked for training funds set aside to serve 300 adults with disabilities, providing job placement services for individuals who complete their career pathways training in partnership with credential-based education offered through the community college system. The goal is to enable individuals with disabilities to obtain the skills and credentials necessary to achieve living-wage employment in high-growth employment fields including healthcare and technology/manufacturing. Round 6 of DEI funding will operate until March 31, 2019.

SIX GOALS OF DEI PILOT SITES
- Create functioning Integrated Resource Teams (IRTs) to address multiple barriers to employment for individuals with disabilities
- Develop Individual Learning Plans (ILPs) that support people with disabilities to succeed in Pathways to Employment
- Increase the number of Tickets assigned and Ticket revenue generated under the Social Security Administration’s Ticket to Work Program
- DRCs will partner with existing career pathways partners such as TANF Employment Service providers, local school districts, community colleges, and Adult Basic Education; they will also bring new partners to the table
- Increase access to American Job Center services for people with disabilities
- Provide Asset Development strategies to individuals with disabilities

Required project reporting information for DEI Round 6 will be captured in OSOS. This guide will provide an overview of which fields in OSOS are essential for reporting out on DEI data elements.

This data is required to be collected from each of the four DEI pilot sites and each of the two DEI comparison sites (list included at the end of this guide). If you work in one of these sites, you must collect this data. If you do not work in a DEI pilot site or DEI comparison site, you do not need to collect the additional data elements needed for DEI outlined in this guide.

OSOS DATA ENTRY
Most of the data elements needed for DEI are currently being collected in the OSOS Customer Module, on the General Info and Work History tabs of the Customer Detail window. A DEI Round 6 tab has also been added to collect additional information. This guide will demonstrate which fields on each of these tabs are required for DEI reporting.
The DEI reporting data must be collected for all customers who disclose having a disability. Customer disclosure may come from an intake form such as the ES-100; previously recorded information found in the customer’s OSOS record; or a verbal attestation by the customer.
GEN. INFO TAB
The fields needed on this tab for DEI are: Last Name, First Name, Date of Birth and Email.

These fields are usually entered as part of the normal OSOS data entry process, so in most cases, you will only need to verify that the information is correct. If any of the information is missing or needs to be updated, please make any necessary changes.

*In addition to all of the DEI fields, all green-dotted fields are still required as part of the normal OSOS data entry process.*

ADD’L INFO TAB
Be sure to indicate disability status on the Add'l Info tab. Upon choosing Disabled from the drop-down list of options next to the Disability Status field, a Disability Category field will appear. Choose the correct option from the drop-down list to indicate the type of disability.
WORK HISTORY TAB
The DEI will track certain information about a customer’s most recent job, most of which can be pulled from the Detail box for the most recent job entry on the Work History tab. The fields needed on this tab for DEI are: Job Title, Start Date, Hourly Wage, and hours worked per week (Hours/week) for the most recent job the customer has held.

If the customer does not have any work history, no information will need to be added or edited on the Work History tab.

- Job Title: This should describe the customer’s most recent job. This field should be populated using the O*Net Titles button.
- Start Date: This field should indicate when the customer started working in the most recent job, in the format of mm/yyyy. Also, if there is an end date for this job, enter it in the End Date field.
- Wage: The wage needs to be reported as the hourly wage. Additionally, the Wage Unit drop-down field next to the Wage field needs to be set to Hourly.
- Hours/Week: Type the number of hours the customer worked each week.

Keep in mind that the data for DEI reporting will be pulled for the customer’s most recent job. This means that you should review the customer’s work history and determine the most recent job to view its detail. An easy way to do this is to sort the job entries by end date (click on the End column header in the list of job entries) and then select the job with the most recent end date.
In addition to the DEI fields mentioned, the **End Date** field must also be filled in for any jobs where the customer is no longer working or if the job has ended. This will be used to pull the most recent job entry information for DEI reporting. Also, as per normal OSOS data entry, all green-dotted fields are required for each job entry.

It is possible that the customer may still be working at the most current job. In this instance, nothing should be entered in the **End Date** field and the **Still employed** option should be selected in the **Reason for Leaving** field.

**DEI ROUND 6 TAB**

The DEI Round 6 tab is in the **Customer Detail** window. Depending on where you are in the **Customer Detail** window, you may need to click on the double-headed arrows at the upper right hand of the screen to navigate to the furthest tabs in the window to be able to see the DEI Round 6 tab.
The DEI Round 6 tab is available to track the remaining information needed for DEI reporting. This tab can be used to track:

- If the customer is a DEI Round 6 participant
- If the customer is enrolled in Career Pathways Training along with the enrollment date
- Service delivery strategies
- Self-disclosed disability categories
- Activities of daily living

To activate the fields on the right-hand side of the window, you will first need to add a new DEI Round 6 tracking entry by clicking on the **Add** button in the lower left hand side of the tab.

This will add a new DEI Round 6 record (displayed as a highlighted row on the left of the screen) and activate the fields on the right-hand side of the tab for data entry.
Newly added record is highlighted

Add button
For the DEI Round 6 Participant, Enrolled in Career Pathway Training, Service Delivery Strategies, and Disability Categories, a check box is provided. Click on any of these selections to indicate “yes” in the intended field. If the customer is enrolled in career pathways training, enter the enrollment date in the dd/mm/yyyy format next to Date Enrolled in Career Pathways Training.

**IMPORTANT: Customers enrolled in Career Pathway Training MUST HAVE a service recorded and funded with the appropriate DEI funds. See page 23 – DATA ENTERING A TRAINING SERVICE for instructions on how to enter a training service.**

The training service in OSOS will keep the program enrollments active while in training. Entering the training service will avoid premature program exits and negative performance outcomes.
SERVICE DELIVERY STRATEGIES

For each of the Service Delivery Strategies, click on the checkboxes to indicate YES. The definitions for each strategy are as follows:

- **Integrated Resource Teams (IRTs)** Team compositions vary depending on the employment needs of the jobseeker, and could include, for instance, representatives from the One-Stop Career Center, other government agencies, community colleges or other post-secondary institutions, nonprofit partners, and other organizations (NDI Consulting, 2011a). “An IRT brings together private and public sector representatives at the local, One-Stop community level. It improves communication and collaboration which results in enhanced coordination of services and supports for an individual jobseeker with a disability” (NDI Consulting, 2011b). The focus on the individual is paramount, and differentiates IRTs from Interagency Committees, which meet regularly to collaborate on systems-level improvements. (From Social Dynamics’ Synthesis Report)
• **Blending and Braiding Funds/Leveraging Resources**
  This requirement refers to the contribution of funds from two or more State and Federal agencies toward the jobseeker’s goals in education, training, and job placement... In the DEI grant, blended funding refers to arrangements that pool funds from multiple sources and make the fund streams indistinguishable. Braided funding pulls together resources from different sources, as well, but keeps the funding streams clearly separated. The use of funds from multiple sources is believed to provide more effective services to the jobseeker, as different funding streams can address the differing needs of jobseekers with disabilities. (SC Interim Synth Report 12-28-12)

• **Works Based Experience, Apprenticeships and Internships**
  Work experience is a planned, structured learning experience that takes place in a workplace and provides opportunities for career exploration and skill development. A work experience may take place in the private for-profit section, the non-profit sector, or the public sector. WIOA identifies types of work experience for employment opportunities available; pre-apprenticeship and apprenticeship programs, internships and job shadowing.

• **Asset Development Strategies**
  The systematic use of asset development programs targeting jobseekers with disabilities can help individuals navigate and take full advantage of the myriad benefits, programs, and incentives that are available to them. What is more, such programs include several services that impact asset building and work decisions; these include housing, child care assistance, health care, nutrition, and other areas not directly related to employment.

• **Wraparound Services**
  A system of care management known as wrap around services incorporates the natural support systems of clients, along with various agency personnel and community representatives, to address the individual’s needs.

• **Customized Employment (CE)**
  Customized Employment and Discovery uses a flexible and individualized process for matching employer job descriptions to jobseekers, one jobseeker and one employer at a time. In the first type of job customization, some job tasks of incumbent workers are reassigned to create a new job description. A job is carved when there is a modification in the job description, reducing the number of responsibilities from an existing job description. And in job sharing, two or more workers share the responsibilities of one job based on each worker’s strengths (ODEP, n.d.a).
• **Benefits Planning**
  The term “benefits planning” refers to the person-centered analysis of the effect that work and other life situation changes have on public and private programs, including income support programs. Benefits planning helps people with disabilities steer through the complicated maze of public and private benefits programs while minimizing disincentives and barriers that exist for them to prepare for, obtain, advance in, retain, leave, and regain employment.

• **Individual Learning Plan**
  A document consisting of:
  (a) course taking and post-secondary plans aligned to career goals; and
  (b) documentation of the range of college and career readiness skills that the student has developed.
ACTIVITIES OF DAILY LIVING

For each of the following activities, click on the dropdown menu and select YES or NO:

1. Are special reminders needed to attend to daily activities or chores?
2. Does participant care for anyone else such as spouse, children, parents, friends, or other?
3. Does disability affect participant's ability to: Dress, Go shopping, Prepare own meals, Drive a car
4. Is help or encouragement needed to attend to daily activities and chores?

Save the record after all entries have been made.
SERVICES

DEI funding may be used for training, supportive services and needs-related payments.

Grantees must use WIOA, W-P, or other program resources to the greatest extent possible to fund all education, training, job search activities, and supportive services for participants. The Department believes that the successful outcomes of adults and youth with disabilities accessing the American Job Center system during the life of DEI (and indeed the success of the DEI projects) depends upon the leveraging of funds and resources beyond the DEI grant funds for education, training, and other activities.

ELIGIBLE PARTICIPANTS

- Customer must self-disclose a disability and be determined in need of training services in order to increase employability. No documentation is required to establish disability status.
- Customer must be eligible to enroll in WIOA individualized or WIOA training services.
- Customer does not need to be a ticketholder; however, priority of service is encouraged for SSA beneficiaries as an incentive to assign the ticket to a Career Center.
- Utilization of the IRT model is not a requirement to utilize training funds; however, it is encouraged and recommended as a way to address the multiple challenges to employment.
- Local area “Policies and Procedures” pertaining to Individual Training Accounts (ITAs), supportive services, and needs-related payments must be followed.
- Training providers must be found on the NYSDOL’s Eligible Training Provider List (ETPL) except for OJT. The service must state "ETPL Auto Load" in the description.
- Training must be for a job determined to be in demand in the customer's geographical area.
- Training completion must occur before March 31, 2019, or the end date of the grant period.

ALLOWABLE TRAINING SERVICES

- Occupational skills training
- On-the-Job training (OJT)
- Workplace training and cooperative education programs
- Private sector training programs
- Skill upgrading and retraining
- Entrepreneurial training
- Adult education and literacy activities in combination with training
- Customized training
The new Workforce Innovation and Opportunity Act (WIOA) “emphasizes training that leads to industry-recognized post-secondary credentials”.

**Wage subsidies and work readiness credentials are not considered allowable training services under this funding.**

Data Entering a Service

**AGENCY**
The user must login to one of the DEI Pilot site offices and register the customer in the respective agency.

Select the agency from the drop-down menu. Round 6 pilot sites are Capital Region and H/M/O)
Both the **Intake** and **Enrollment** Dates must be completed. These dates are usually the same date that you begin providing service to the customer.

The customer must also be active in the Department of Labor agency. Click the **Save** button.
SUPPORTIVE SERVICE
Click the Service tab.

Click the New Service button towards the bottom of the screen.

Clicking the New Service button will bring the user to the Quick Search tab. If the Offering ID is known, enter it in the field labeled ID 1 and click the Search button.
If the Offering ID is not known, then click the **General Info** tab. Enter any known information in the available data fields. OSOS allows you to enter the beginning letters of a **Provider Name**, **Service Name**, or select the **Program** or **Service Type** from a drop-down menu. Click the **Search** button at the bottom of the screen.
Clicking the **Search** button will bring up a menu of services from which to select one:

Or, when the information that is data entered results in a single match, OSOS navigates to the **Offering Detail** screen:
Select the appropriate offering and click the **Schedule** button:
OSOS will navigate back to the Services tab with the provider and offering details automatically populating the service. For Supportive Services and Needs Related Payments, data enter the Planned and Actual Start Dates, Planned End Date and the appropriate Program Service Type from the drop-down menu and click the Save button:
Enter the number "1" to the **Total Funding** data field. OSOS is not used in NYS to track service costs, so the "1" is entered to ensure proper reporting of the service. Click the **Add** button.

The **Funding - - Webpage Dialog** box will appear. Enter the number "1" in the **Obligated Amount** data field and select the **DEI Supplemental Funding Source** if the customer is eligible or a more appropriate option. Click the **OK** button.
Click the **Save** button. If the service has ended, enter the **Actual End Date** and **Completed Successfully** data fields. Click the **Save** button again:
NEEDS RELATED PAYMENTS SERVICE
For Needs Related Payments, click the New Service button in the Services tab. Select the WIB and click the Program Service Type button.

Select the L2 State Funded Programs Needs Related Payments option to search for the service:

Click and then the Search button:
Clicking the **Search** button navigates the user to the **Needs Related Payments** offering. Click the **Schedule** button. Complete the remainder of the service in the Services tab as described in the **Supportive Service** section.

*If the program service and offering does not exist for the WIB, then it will need to be created. Coordinate with the individual in the WIB that has the authority to create provider services and offerings.*
TRAINING SERVICE

CLASSROOM TRAINING
Clicking the **New Service** button will bring the user to the **Quick Search** tab. If the **Offering ID is known**, enter it in the field labeled **ID 1** and click the **Search** button.

If the Offering ID is not known, then click the **General Info** tab. Enter any known information in the available data fields. OSOS allows you to enter the beginning letters of a **Provider Name**, **Service Name**, or select the **Program** or **Service Type** from a drop-down menu. Click the **Search** button at the bottom of the screen.
Select the appropriate offering. Remember that the Description must state "ETP Auto load" with the auto loaded date.

Click the Schedule button.
OSOS will navigate back to the **Services** tab with the provider and offering details automatically populating the new classroom training service.

Complete the following data fields in the **Detail** section of the tab:

- **Plan. Start Date**: Enter the planned started date when the service is expected to start in the format of mm/dd/yyyy
- **Plan. End Date**: Enter the date the service is expected to end
- **Actual Start Date**: Enter the date the service begins. This cannot be a future date
- **Program Service Type**: Select **ITA - Training** for classroom training from the drop-down menu
- **Part Time Learn.**: Enter **Yes** or **No** to indicate if the classroom training is part time
- **Distance learn.**: Enter **Yes** or **No** to indicate if the classroom training will include online or another form of distance training
Enter the O*Net code, if known.

If the O*Net code is not known, it may be identified by clicking the O*Net button.
Clicking the **O*Net button** will bring up the O*Net window.

Enter in a keyword and click the **Search button** or drill down through the folders to locate the appropriate **O*Net** title. Then click the **Select button**.

The **O*Net** code may be found in the Provider Service details:
Enter the O*NET code and click the **Save** button.

Enter the number "1" to the **Total Funding** data field. OSOS is not used in NYS to track service costs, so the "1" is entered to ensure proper reporting of the service. Click the **Add** button.
If the classroom training is being funded totally through WIOA or DEI, then enter the number "1" in the **Obligated Amount** and select the solitary funding.

Click the **OK** button.

![Image of Funding Screen with Obligated Amount 1]

If the classroom training is being funded partially through WIOA and DEI, then enter the number "0.50" in the **Obligated Amount** and select both funds.

Click the **OK** button.

![Image of Funding Screen with Obligated Amount 0.50]
Click the **Save** button.
OJT SERVICE
Click the New Service button towards the bottom of the screen of the Services tab.

Navigate to the General Info tab in the Offering Search window.

Make sure that the appropriate WIB is listed or that no WIB is listed.

The Provider Name is usually the name of the employer providing the training. If it is known, enter all, or part of the Provider Name or Service Name.

Click the Service Type button.
Clicking the **Service Type** button will bring up the **Service Type - Webpage Dialog**.

Drill down through the folders or Enter in a keyword and click the **Search** button to locate the appropriate **Service Type**.

Then click the **OK** button.
Enter all or the beginning of the **Provider Name** or **Service Name** and click the **Search** button.
Select the appropriate OJT training provider and click the **Schedule** button.
OSOS will navigate back to the Services tab with the provider and offering details automatically populating the new OJT service.

Complete the following data fields in the Detail section of the tab:

- **Plan. Start Date**: Enter the planned started date when the service is expected to start in the format of mm/dd/yyyy
- **Plan. End Date**: Enter the date the service is expected to end
- **Actual Start Date**: Enter the date the service begins. This cannot be a future date
- **Program Service Type**: Select Non-ITA Training for OJT and customized training from the drop-down menu
- **Part Time Learn.**: Enter Yes or No to indicate if the classroom training is part time
- **Distance learn.**: Enter Yes or No to indicate if the classroom training will include online or another form of distance training

Click the **Save** button:
The O*Net code must be included for all training services. There are two ways to locate the O*Net title and code if it is not known.

The first method is to clicking the O*Net button to bring up the O*Net window.

The second method is to copy it from the Provider Service details, when available.
Clicking the **O*Net button** will bring up the O*Net window.

Enter in a keyword and click the **Search** button.

Select the appropriate **O*Net** title and click the **Select** button.
Another way to locate the **O*Net** title is to drill down through the folders. Then click the **Select** button.

The **O*Net** code may be found in the Provider Service details:
Enter the O*NET code and click the Save button.

Click the Save button.
Enter the number "1" to the **Total Funding** data field. OSOS is not used in NYS to track service costs, so the "1" is entered to ensure proper reporting of the service. Click the **Add** button.

If the OJT is being funded totally through WIOA or DEI, then enter the number "1" in the **Obligated Amount** and select the solitary funding. Click the **OK** button.
If the classroom training is being funded partially through WIOA and DEI, then enter the number "0.50" in the **Obligated Amount** and select both funds. Click the **OK** button.

![Image of Funding window]

- **0.50**
- **OK button**

Click the **Save** button.

![Image of Services window]

Remember to enter an Actual End Date and whether the customer completed the training successfully or not.
DEI PILOT SITES
Albany/Schenectady/Rensselaer
Herkimer/Madison/Oneida

DEI COMPARISON SITES
Oswego
Onondaga

RESOURCES AND ASSISTANCE

DEI Project Assistance:

- [http://labor.ny.gov/workforcenypartners/dpn_dei.shtm](http://labor.ny.gov/workforcenypartners/dpn_dei.shtm)
- By Telephone: (518) 457-2381
- By email: specialpopulations@labor.ny.gov

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

- [http://labor.ny.gov/workforcenypartners/tools.shtm](http://labor.ny.gov/workforcenypartners/tools.shtm)

For data entry assistance with OSOS, please contact the OSOS Help Desk:

- By Telephone: (518) 457-6586
- By email: help.osos@labor.ny.gov