Changes to OSOS
Version 6.7.3

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Today we will cover some of the changes you will see in OSOS version 6.7.3. We will go over the changes that were made to the Customer Registration form, and the fields in OSOS that coincide with these changes. We will also discuss the Supplemental Questionnaire, and how to record that information in OSOS. We will leave time at the end of the training for any questions.
The changes in version 6.7.3 of OSOS were made based on changes made under The Workforce Innovation and Opportunity Act, WIOA.

WIOA emphasizes the importance of working with customers who have barriers to employment. It is our responsibility to provide priority of service to both veterans and individuals who are determined and assessed as having barriers to employment. We make these assessments to determine if the customer is eligible for certain programs and services.

The Supplemental Questionnaire was developed to assist you with your customer assessment.

Both the Registration form, and the Supplemental Questionnaire, will assist you in assessing your customer, their needs, and potential barriers to employment. The fields and tabs in OSOS allow you to capture this information.
Both the Customer Registration Forms (ES 100 or ES 101) and the ES 102 Supplemental Questionnaire are available on the Intranet Forms page.

They are also available on the Internet page under Forms and Publications.

The forms can also be ordered for mass printing.
Every Customer must be registered in OSOS. The information required on this form includes all of the information you will need to register your customer in the system.
The Customer Registration form is used to collect and record basic customer information that is needed for OSOS. The intention is that the customer would complete this form prior to meeting with a staff person. The customer registration form will help you assess your customer to determine what programs and services they are eligible for.

Information from the registration form that you will use to assess your customers includes their age, education, dislocated worker status, and trade information.
During this training, we are going to go through the new Customer Registration Form piece by piece. We will explain what has changed and how to correctly enter the information collected on this form in OSOS. If you are using a local registration form, you may need to modify your form to include the additional information that we are now collecting under WIOA.
The first part of the Customer Registration Form asks the customer what their preferred language is. If the customer indicates that their primary language is one other than English, it is at this point that you would determine if the customer needs the assistance of an interpreter, and if so, contact the appropriate language access services.

I would also like to mention that this form is a vital document and is translated in seven different languages. If your customer speaks Spanish, Chinese, Haitian Creole, Italian, Korean, Polish, or Russian, you can provide them with the Customer Registration Form in their preferred language.
We record a customer’s primary language, if it is a language other than English, in the Primary Language tab of OSOS located in the Customer Detail window. First, you would select, “Add” in the bottom portion of the screen and a check mark will appear in the upper left portion of the screen.
On the right side of the screen, you will use the drop down to select the customer’s primary language. This is the section where you will also document if language assistance is needed, if an interpreter was used, and the interpreter’s relationship to the customer.

We have included the link for the Language Services OSOS Guide at the bottom of the screen.

Ok, after the primary language has been completed, the next section of the Customer Registration Form is the Customer Data. This information is data entered in the General Info Tab in OSOS. If you are working with a UI customer, much of this information will already be in OSOS. New to this registration form is the section that asks for NYS Driver License Number, and Selective Service Registration.

NYS Driver’s License ID # has now been added to the registration form for purposes of validating age and date of birth. For more information on validating date of birth, you can refer to the OSOS desk guide.

If your customer indicates that they are a female, selective service will not be an option to choose in OSOS. However, if the customer indicates that they are a male born after December 31, 1959, then selective service in OSOS will be a required field. I will discuss where Selective Service is entered when we discuss military status.

If the customer does not select male or female on the form, you can select, “Not Disclosed” in OSOS.
The next section of the Customer Registration Form deals with Ethnicity and Race. This is information that we have to ask for reporting purposes but the customer does not have to disclose. Please note that if you are using a local form, the language used in this question cannot be modified because it is a federal requirement.
Race and Ethnicity need to be documented in the General Info Tab of OSOS on the right hand side of the screen. You are required to select an Ethnic Heritage as well as Race. If the customer does not provide you with this information, you can select “Not Disclosed.”

In the past, if this information was not data entered, OSOS would default to the “Not Disclosed” option. Now staff must make a selection in order to save the record.
The next section of the Customer Registration Form covers information about the customer’s level of education. There is some very important information that is collected on this section of the form. First, if the customer indicates that they have an IEP Diploma, this should alert you to the fact that the customer has a disability and may require additional services and assistance. However, the customer does not have to disclose this information.
Education is also a required field that needs to be documented on the General Info Tab of the customer’s record in OSOS. Use the drop down menu to select the customer’s level of education as well as their school status.

It is also important to note that if a customer selects any type of college degree on the Customer Registration Form, then further information will also need to be data entered in the Education/Licensing Tab. This information is necessary for the Employability Profile and needs to be accurately data entered.
When using the drop down to select the Education Level, there are no changes to the data you enter other than the term GED has now been replaced with High School Equivalency.

When you are selecting a School Status, there is a new option that can be selected, “Not attending school within compulsory age.” This option would only be selected if you are working with a youth customer that is within the compulsory age. This option is only appropriate within the youth program.
The next section on the Customer Registration Form that we are going to cover is the Employment Section. In this portion of the form, we ask the customer if they have applied for Unemployment Insurance and if they are currently claiming Unemployment Insurance Benefits. Sometimes, a customer who is claiming benefits will come in to a Career Center before they receive their mandatory appointment letter or the customer may not have been called in for an appointment but may be claiming benefits. We do not expect staff to update UI information in OSOS. However, if a customer checks, “yes” for one of these questions, it is meant to indicate to staff to search the customer first as well as provide more information as to how to serve them.

There are also two new questions that were added to the form. “How many weeks have you been out of work and How many hours do you work per week?” The first new question we have outlined in red can be used to indicate if the customer is long term unemployed, meaning that they have been unemployed for greater than 26 weeks.
You will use the drop down to data enter Employment Status in OSOS. New to OSOS 6.7.3, is the option to select “Not in Labor Force.” This means that the customer is not employed and is not looking for work. When selecting this option, the customer’s Job Seeker status must be changed to “Inactive” in order to save the record.

Staff will also need to indicate by selecting Yes or No if the customer is underemployed or long term unemployed.

According to WIOA an individual is underemployed if they are working part time but desire full time employment, or they are working in employment not commensurate with the individual’s demonstrated level of education and or skill achievement.
The Military section of this new Customer Registration Form has been condensed to only determine military status. If your customer indicates that they have served or are an Eligible Spouse of a veteran, this should trigger staff to use the Military Service Questionnaire (MSQ). This form can be found on the Intranet under Forms and is meant to be completed with the customer. Once the MSQ is completed, depending on eligibility, the customer may be referred for DVOP services.
Military Service is data entered in the Additional Info Tab of OSOS. This is the same information that you are capturing in the current version of OSOS with the only difference being that Military Service is now located on the left hand side of the screen.

As we discussed earlier, if your customer is a male born after December 31, 1959, and indicates that they have registered for Selective Service, you would need to select the box for Selective Service. If the customer does not know their registration number, there is a button in OSOS that will link you to the site that you can look this information up. If your customer is a female, then the Selective Service box will not display in the Additional Info Tab.
The next section covered on the Customer Registration Form are the customers’ Employment Preferences. There has been no change to how this information will be data entered in OSOS with the exception of the Migrant Seasonal Farmworker. The MSFW question has been condensed from the old version of the Customer Registration Form because more in depth information will now be collected on the Supplemental Questionnaire. We will discuss the MSFW piece in further detail when we talk about the Supplemental Questionnaire.

The only other change to this portion of the form is under the Employment Objective. As you can see in the red box, we have added an extra line for Job Title. This allows the customer to indicate a second job title that they are interested in.
One of the bigger changes that you will see in OSOS 6.7.3 is that there is a new tab in the Customer Detail Window called the Eligibility Tab. Migrant Seasonal Farm Worker will now be data entered in the Eligibility Tab. Also collected in this tab will be Income Information, Disability Information, HVRP (Homeless Veterans Reintegration Program), and INAP (Indian and Native American Programs) Program Information.

I am not going to go through this tab in its entirety right now because Katlin will discuss the Eligibility Tab in detail when she goes through the Supplemental Questionnaire.
The next section of the Customer Registration Form is the Work History. Many times customers can not remember all of the details of their prior positions. We would ask that the customer complete as much information as they can in this section. Much of the information collected in this section is the same as the information that the old form asked.

I wanted to note that for the start and end dates, for data entry, we now need to collect the month, day, and year for both of these fields. This is not represented on the form but I will show you when we look at OSOS. We do anticipate that this field will be changed on the form. If the customer is unsure of the exact start and end dates for their work history, we would ask them to give us their best approximation.

The other information that is captured in this section is “Reason for Leaving.” Staff should be aware that depending on the answer that the customer provides, further more clarifying questions may need to be asked. The customer’s answer will be used to assess Dislocated Worker Status and it may also help determine if the customer is long term unemployed.
As I stated a few minutes ago, the system now requires an exact month, day, and year be entered for the start and end dates of each work history. This is illustrated in the red highlighted box on the screen. Please be sure to ask the customer for the full date. If the customer doesn't remember the exact dates, we will need to ask them for their best approximation.

If the customer is determined to be a Dislocated Worker which we will discuss on the next slide, then the end date would also be their Date of Dislocation.
Reason for Leaving is a key field for documenting and determining Dislocated Worker status. There are six categories for Dislocated Workers. For consistency, we have labeled all categories with the prefix “DW.” Under WIOA there is now a new category, “Category 6 – DW Spouse of a member of the Armed Forces.” We will go into more detail on this category when we discuss the Supplemental Questionnaire.
As we discussed on the previous screen, there are now six Dislocated Worker Categories. You can access the specific definitions for these categories on the Internet at the link on the bottom of the page.

Dislocated Worker Categories

1. Category 1 - DW
2. Category 2 - DW Mass layoff or closure
3. Category 3 - DW Self-Employed
4. Category 4 – DW Displaced homemaker
5. Category 5 – DW Dislocated due to foreign trade
6. Category 6 – DW Spouse of a member of the Armed Forces

New to this Customer Registration Form is a Trade Adjustment Assistance question. The purpose of this question is to try and capture Trade Affected customers earlier on.

If your customer indicates that they are TAA eligible or were separated due to foreign trade, this should serve as a trigger for you to reach out to the TAA Coordinator in your area and make that connection for your customer.
The next section of the Customer Registration Form is the Driver’s License Information. None of this information has changed from the older version of the registration form. However, information collected on this portion of the form can be used for job matching purposes.
The following section on the Customer Registration Form is the Certificates/Licenses. Nothing has changed on this form from the information that was collected on the old Customer Registration Form. There is no difference in how this information is data entered in OSOS either.
The last section of the Customer Registration Form is Job Skills and Qualifications. It is important to encourage your customers to provide you with as many skills as they have. The more information we can collect will help to build a better resume in JobZone.
Entering skills and qualifications in OSOS are done in the Skills Tab. The method for this data entry has not changed in OSOS 6.7.3. However, as you can see on this slide, we encourage you to enter as much information in the skills section as you can so that you have a robust set of skills relating to the position the customer is looking to obtain.
Now we will go over the Supplemental Questionnaire, and how to record the information we capture from this form into OSOS.
The supplemental questionnaire should be provided in conjunction with the Customer Registration form, whether your office uses the ES 100, 101 or a local version of the registration form. All of our customers must have the opportunity to fill out the Supplemental Questionnaire.

The questionnaire is used to assess your customers eligibility for additional workforce system programs and services.

An added benefit to gathering the information asked on the supplemental questionnaire is that the population that you are serving is being appropriately documented. Capturing customer’s with barriers to employment is crucial when the local areas negotiate their performance goals. If your area is serving the hardest population(s) to serve it can affect the performance goals set for that area.

This form should not be something that you hand off to your customer to fill out on their own. The definitions used on the form are taken from the WIOA regulations, and can be very confusing. We want you to assist your customer in filling out the questionnaire, just like you currently do with the veteran’s MSQ. Filling out the form together will not only assist the customer, but will help you in your assessment. It might become clear to you that this customer does have barriers to employment, and will be eligible for additional services.
The information collected is confidential and the form is used to determine program eligibility, for federal reporting purposes, and affirmative action requirements.

This form is voluntary, however, we want you to strongly encourage each of your customers to complete the form so we can assist those individuals who are eligible for additional services and programs.

The supplemental questionnaire asks 11 questions to assess the customer’s eligibility for additional programs and services-I’ll go through each question and identify where the information that’s provided on the form needs to be documented in OSOS.
Question 1- is concerning Public Assistance and Low income.

The question asks the customer if they are a member, or any member of their family is receiving any Public Assistance/Low Income. This includes all of the public assistance listed under question one, TANF, Food Stamps SSI etc.

If the customer indicates yes, they should also check the boxes of the assistance they are receiving. You will record this information in the Programs and Public Assistance tab in OSOS.
The look of the Programs and Public Assistance tab has significantly changed. In the current version of OSOS the Programs are listed on the left hand side and the Assistance on the right. In version 6.7.3 of OSOS the Public assistance is listed on the top half of the tab.

To record this information, you will check the box next to the Public Assistance indicated on the questionnaire and then enter the Registration date, which is the date the customer started receiving these benefits. The Registration date is a required field and the record will not save without this information. At this time you will have to ask the customer what this date is, as there is not a space for this information on the questionnaire. We will be adding a space for the customer to record this date on the Supplemental Questionnaire. This date can be an approximation.
The second part of question 1 asks about Low income.

“Are you a low income individual with a total family income that does not exceed the higher of, the Poverty Line Or 70% of the lower living standard income level”

WIOA defines the term “low income individual” as one who qualifies under various criteria, including an individual who received income for the six-month period prior to application for the program involved that does not exceed the higher of the poverty line or 70% of the Lower Living Standard Income Level.

All staff should use current Poverty Income and LLSIL (Lower Living Standard Income Level) guidelines to determine income eligibility for WIOA services. Current tables can be found on the NYSDOL website.

Most of your customers will not know if they meet these guidelines so it is a best practice that you print out and have the chart on your desk so you and your customer can easily determine if they meet the low income guidelines.
The information on the income eligibility guidelines are located on the Programs and Tools section of our website. Use the : LLSIL guidelines- based on county, and local area.
Use this chart to determine if your customer meets either the 70% of the Lower Living Standard Income Level or the poverty level. This chart provides information based on counties. Use the definitions listed on the bottom of the chart to determine the area your customer is located. Determine the customer’s family size and if the customer meets the 70% of the Lower Living Standard income level - which is the information listed on the left hand side of the chart.

Use the Poverty level data-in the middle of the chart based on family size to determine if your customer meets the lower living standard criteria.
You can also use this chart to determine eligibility. This chart is also provided on the NYSDOL website and the data is based on Local areas.
Once you determine if your customer is a low income individual, record this information on the new Eligibility tab, this tab is new in OSOS, and is used to record Eligibility information. The Lower living standards and the 70% LLSIL fields are mandatory and must be completed in order to save the record. This is also new, in the current version of OSOS these fields are not mandated.

For the Lower Living Standard field you can select Yes or No. Select the correct option based on how your customer answered this question - remember this is determined from the Poverty level guidelines on the chart we just discussed.

If the customer meets the criteria for 70% of the lower living standards income level based on the chart select yes from the drop down menu.

The Local Priority income information is established by the local areas - this field is not new.

The ‘High Poverty Area’ field is new in this version of OSOS. This information can be found on TEGL #21-16 and is pulled from the census.
Question 2 is the Disability question—this question was removed from the Customer Registration form and added to the Supplemental Questionnaire.

Disability under WIOA is defined as, having a physical or mental impairment that substantially limits one or more of your major life activities. If the customer indicates yes, they also can choose the type of disability they have listed on the questionnaire.
In the previous version of OSOS the Disability status was recorded in the Additional info tab. Now, the disability status will be captured in the Eligibility tab.

If the customer discloses that he/she has a disability you would select disabled from the dropdown field, all of the listed disabilities on the questionnaire will then be available to select here.

Select the appropriate category based on the customer’s response on the questionnaire. If the customer didn’t disclose the type of disability select ‘not disclosed.’
Question 3 on the Supplemental questionnaire asks the customer if they are a Migrant or Seasonal Farm Worker.

This question was condensed on the Customer Registration form and points customers who indicate they are a seasonal or migrant farm worker to refer to the supplemental questionnaire. The Supplemental questionnaire provides the definitions of these workers, which help customers and staff capture accurate information for this population.

Under WIOA a seasonal farm worker is, someone who is or was employed in the past 12 months in **farm work of a seasonal or other temporary nature** and **who can return to their permanent place of residence in the same day**. This does not include non-migrant individuals who are full-time students. Your seasonal Farm worker is an individual that works on a **FARM** (this is crucial, this does not include your typical seasonal worker-seasonal bus driver, landscaper etc. this is specific to farm work; harvesting, pruning, picking etc.) the farm worker is able to return home every day after work, they are part of the community. For example, a seasonal farm worker would be an apple picker who lives in the capital district and works in the capital district, he picks apples during the harvest season, and is able to go home every night
after his work day.

Under WIOA a Migrant Farm Worker is a farm worker that **travels to the job site and cannot return to their permanent place of residence the same day.** This does not include full-time students traveling in organized groups rather than with their families. An example of a Migrant farm worker could be a worker from a different state, a domestic worker, for example an individual from Texas, Florida, Puerto Rico who travels to NY and works during the harvest season. This individual is unable to travel back home after they work for the day-most Migrant workers are provided housing on the farm. by the Farmers. The Key for a Migrant farm worker is that the individual cannot return home the same day they worked.

A Migrant Food Processor is defined in the same way a migrant farm worker is defined under WIOA, however, this individual is processing food, for example, making apple cider-they are processing the apples into cider.
Migrant and Seasonal Farm worker information is currently being captured in the Add’l info tab, in the new version of OSOS. The Migrant and Seasonal Farm worker information is recorded on the Eligibility Tab under ‘Migrant Info.’

If the customer indicates they are a migrant or seasonal farm worker select yes, once this is selected, the additional required fields will appear, you will need to select the ‘Class’ and ‘Farmwork type’ just as you do now.
The drop down options for the class field that you would select are:
Migrant and seasonal farmworker
Migrant farmworker
Migrant food processing worker
Seasonal Farmworker
The drop down options for the ‘Farmwork Type’ have not changed. They are:
Agricultural production and Services or
Food Processing Establishment
Question Four pertains to a spouse of a US armed forces member.

The question asks, Are you a Spouse of a US Armed Forces member on active duty and lost your job as a direct result of relocation due to a permanent change of your spouse’s duty station?

In other words, Did this customer have to leave or quit their last job due to a change in where their spouse is stationed?
If the customer is a spouse of a US Armed Forces Member and had to relocate due to a permanent change in duty station the customer would be a Dislocated worker-category 6-Spouse of a member of the Armed forces. This DW category is new.

You would select that as the Reason for leaving in the customer’s work history tab.

You will then be required to input the Dislocation date (which is the last day the customer worked) and tenure months.
The next question asks if the customer is a Displaced Homemaker—this definition has not changed under WIOA.

A displaced homemaker is an individual who has been providing unpaid services to family members in the home AND:

- Depended on the income of another family member but are no longer supported by that income; or are the dependent spouse of a member of the military on active duty and whose family income is significantly reduced due to a deployment, a call or order to active duty, or the death or disability of the member, AND
- Are unemployed or underemployed and are having trouble finding or keeping employment.
A customer who is a Displaced Homemaker will need to be recorded as a dislocated worker in the Work History Tab, in the ‘Reason for Leaving’ field. From the dropdown select, Category 4-DW displaced homemaker.

In some cases you may need to add a work history for this customer, if the customer hasn’t held a job in the past ten years, for example, create a work history with the job title homemaker. This way we can capture the Displaced Homemaker status,

Additional tabs and fields may also need to be completed in order to add services for displaced homemakers. These are outlined in the Displaced homemaker OSOS program guide, available on the internet.
Question 6 on the Questionnaire, asks the customer if they are a single parent.

Are you a single, separated, divorced or widowed person who has primary responsibility for one or more dependent children under age 18 (including single pregnant women)?
If the customer indicated that they are a single parent you will capture this in the Family tab of the Comp Assess window in the ‘Family Status field.’ select, Parent in one-parent family

Make any notes that are relevant to the customer needing child care arrangements, and any help or support they receive from family and friends.
Number 7, asks if the customer is homeless?

The definition of homeless has expanded under WIOA. Homeless is now defined as, lacking a permanent and suitable nighttime residence. This includes:

- Sharing housing with other persons due to loss of housing, economic hardship or a similar reason,
- Living in a motel, hotel, trailer park or campground due to a lack of other suitable options,
- Living in an emergency or temporary shelter,
- Abandoned in a hospital,
- Awaiting foster care placement, or
- Having a main nighttime residence that is a public or private place such as a car, park, abandoned building, bus or train station, airport or campground.
If the customer indicates that they are homeless you will need to record this information in the Housing Tab of the Comp assessment window. This is recorded the same way you are recording this information in the current version of OSOS.

In the ‘Current Housing’ field indicate homeless, and any additional information you gather from your customer.
If your customer is a homeless Veteran you will also need to capture this information in the Additional Info tab in the customer detail window, under current housing, select Homeless-recording this information has not changed at all.
Number 8 asks the customer if they are an Ex-Offender?

The definition of Ex-offender has not changed, an Ex offender is an individual who has been subject to any stage of the criminal justice process, individuals who need help overcoming barriers to employment resulting from a record of arrest or conviction for crimes against persons or property, status offenses or other crimes.
You will still record this information as you are now, record the customers Offender Status in the Comp Assess Window in the legal tab. Select Yes in the Offender Status field. If the customer indicates he/she is on probation include that information in this tab as well.
You will also want to make a comment regarding any work restrictions resulting from a conviction—comments should be specific to job search restrictions and work restrictions only.
Question 9 asks the customer if he/she is an English Language Learner- The English Language Learner was formerly known as the LEP- or Limited English Proficient, under WIOA we refer to these customers as English Language Learners.

An English Language Learner will have limited ability in speaking, reading, writing or understanding English.

They may also meet one of these two conditions:
Their native language is other than English or they live in a family or community where a language other than English is the main language.

When you are speaking to your customer, and assisting them with this form, you will most likely get a sense if the customer is an English Language Learner, if they are having difficulty reading the forms, articulating their answers in English ETC, English Language learners may be in need of ESL classes, for example.
If the customer is an English Language Learner indicate this in the Education tab of the Comp Assess window, this field is labeled LEP (limited English Proficient) in the current version of OSOS, in the new version it will be displayed as English Language Learner.
Number 10 on the Supplemental Questionnaire asks, Do you think you have a Cultural Barrier? This is a new barrier to employment under WIOA, and thus a new question that is asked to our customers.

WOIA defines a cultural Barrier as having; attitudes, beliefs, customs or practices that may make it hard for an individual to find work.
If your customer indicates they have a cultural barrier to employment, record this in the Employment Tab of the Comp Assesses window. Because this is a new barrier and question this is also a new field in OSOS.

If the customer explains the cultural barrier indicate this in the Cultural Barriers text box.
The last question on the Supplemental Questionnaire asks the customer if they lack basic skills.

Are they unable to solve problems, or read, write or speak English at a level necessary to function on the job, in their family, or society.

Much like the English Language Learner question you may be able to tell that your customer is lacking basic skills while you are filling out the form together, or based on their answers on the registration form.

A Customer who is illiterate also meets this definition; a customer who cannot read or write, or cannot do either is lacking basic skills. A customer who indicated they have an IEP diploma, a customer who needs assistance with adult education, or is lacking a HSE- may be lacking basic skills. In addition, a customer who is an ELL also meets the criteria for “Basic Skills Deficient”
If the customer is lacking basic skills you would record that information in the Education tab of the Comp assessment window.

The dropdown options include, Basic skills Deficient, Low Level of Literacy, or both.
QUESTIONS!?