Disability Employment Initiative
OSOS Guide
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PURPOSE
On September 26, 2013, the NYS Department of Labor received a forty-month Disability Employment Initiative (DEI) grant in the amount of $3,857,758 as part of a federal project to improve outcomes for individuals with disabilities by providing education, training and employment opportunities. An increase in performance measures and outcomes for customers with disabilities is expected under DEI.

FIVE GOALS OF DEI PILOT SITES

- Increase the number of tickets assigned and ticket revenue generated under the Social Security Administration's Ticket to Work Program
- Increase access to services for people with disabilities
- Create functioning Integrated Resource Teams (IRTs) to address multiple barriers to employment for individuals with disabilities
- Increase partnerships and collaboration amongst those providing services to individuals with disabilities
- Provide Asset Development strategies to individuals with disabilities

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

This data is required to be collected from each of the 4 DEI pilot sites and each of the 2 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 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 any 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 may need to 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 also 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 TAB

The DEI tab is available to track the remaining information needed for DEI reporting. This tab can be used to track:

- The benefits a customer received at the most recent job
- Customer referrals from and to Adult Career and Continuing Education Services – Vocational Rehabilitation (ACCES-VR)
- Information about the customer’s Social Security disability benefits (SSI and/or SSDI) and participation in the Ticket to Work (TtW) program
- Utilization of Asset Development strategies and/or the Integrated Resource Team procedure, at pilot sites only.

The DEI tab is located 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 tab.
Then you should be able to see the DEI tab and click on it to select it.

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

**Benefits at the Most Recent Job**
To complete the data in the first checkbox field, you will need to ask the customer which benefits were available at the customer’s most recent job. If none of the listed benefits were available at the customer’s last job, check the **None** checkbox at the top of this field. Otherwise, check all that apply.
Definitions for each of these benefits have been provided at the bottom of this tab. Scroll down to see the complete list.

**Definitions**

Health Insurance - Employee health plan maintained by an employer that provides assistance to the employee and/or dependants in the form of reimbursement for medical expenses ranging from routine doctor visits or surgery.

Vacation - Paid absence from work allowed an employee as a benefit of being employed for a certain period of time.

Sick Leave - Paid absence from work allowed an employee because of sickness.

Flexible Hours - A system that allows employees to set their own daily times of starting and finishing work, within specific limits.

Working From Home - The ability to work at home without appearing before a boss and without conducting business at the employer's establishment.

Customized Employment - Individualizing the employment relationship between employees and employers in ways that meet the needs of both.

Job Sharing - The division of a job between two or more people such that each covers the same job for complementary parts of the day or week.

**REFERRALS TO AND FROM ACCES-VR**

As part of this initiative, we will also be tracking the number of customers referred to our services by ACCES-VR and the number of customers our staff refer to ACCES-VR services. For each of these fields, you will click on the drop-down arrow and select the appropriate option. The options listed are: Yes, No and Unknown (use if it is unknown if the customer was referred).
**DEI Customer Self Attestation**

For DEI reporting, information should be tracked to indicate if a customer is currently receiving or has received Social Security disability benefits and whether or not the customer is currently a Ticket to Work participant. This information can be supplied verbally by the customer.

- **Customer currently receiving Social Security Disability Insurance (SSDI)?** - Select Yes or No from the drop-down field
- **If NO, Has customer ever received SSDI?** - Select Yes, No or Do Not Know/Unsure from the drop-down field
- **Customer currently receiving Supplemental Security Income (SSI)?** - Select Yes or No from the drop-down field
- **If NO, Has customer ever received SSI?** - Select Yes, No or Do Not Know/Unsure from the drop-down field
- **Customer currently a Ticket to Work Participant?** - Select Yes, No or Do Not Know/Unsure from the drop-down field

If you work at a comparison site, or are not a Disability Resource Coordinator (DRC) at a pilot site, then you do not need to enter data under the remaining two fields - **Asset Development or Integrated Resource Teams.** These two fields are solely the responsibility of the DRCs, as they are required job duties under the DEI and only expected of the DRCs.

Click **Save** to save your changes when you finish entering the data.
If you are a DRC, continue to enter the remaining information as described in the remainder of this guide.
**ASSET DEVELOPMENT - PILOT SITES ONLY**

The information collected under this section should only be entered by the DRCs at the pilot sites.

- Did customer receive information or training in asset development? - Select Yes, No, or Unknown from the drop-down field
- Which of the following topics were covered? - Check all that apply (see below for further clarification regarding a few of the topics)

**Use of beneficial tax provisions:** Examples of these would be the Earned Income Tax Credit and Saver’s Credit.

**Advisement regarding Social Security Disability Benefits, Work Incentives, and Employment Supports:** This box should be checked if the benefits and work incentive advisement was provided by the DRC at the Career Center.

**Referral to Benefits Advisor outside the Career Center:** This box should be checked if the customer was referred to a Community Work Incentives Coordinator outside the Career Center. Referral to or guidance from the State DRC is also appropriate.

**Managing Money and Credit:** i.e., financial literacy.
INTEGRATED RESOURCE TEAMS - PILOT SITES ONLY

The information collected under this section should only be entered by the DRCs at the pilot sites.

- Did the Career Center bring in other service providers and/or agency partners to help customer access needed resources? - Select Yes, No, or Unknown from the drop-down field
- Did this result in additional resources and/or services for the customer? - Select Yes, No, or Unknown from the drop-down field

Remember to revisit the DEI tab to complete these additional DRC specific fields if the tab was initially completed by someone else.

When you finish entering the data, click Save to save your changes.

SERVICES

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

Grantees must use WIA, 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 WIA intensive or WIA 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 January 31, 2017, 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.

Agency menu
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 Offerinmg 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 on-line 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 WIA 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 WIA and DEI, then enter the number "0.50" in the **Obligated Amount** and select both funds.

Click the **OK** button.
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 WIA 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 WIA and DEI, then enter the number "0.50" in the **Obligated Amount** and select both funds. Click the **OK** button.

Click the **Save** button.

Remember to revisit this tab once the training is completed to enter an **Actual End Date** and whether or not the customer completed the training successfully. If no **Actual End Date and Completion Status** is entered, NYSDOL will not be able to report a successful outcome.
DEI PILOT SITES
Cayuga/Cortland
Hempstead/City of Long Beach
Saratoga/Warren/Washington
Suffolk

DEI COMPARISON SITES
Cattaraugus/Allegany
Oyster Bay/North Hempstead/Glen Cove

RESOURCES AND ASSISTANCE
DEI Project Assistance:
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

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