DVOP
My Case Load Tab
OSOS Guide
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PURPOSE
OSOS users have the ability to create a personal case load to manage both customer and business contact records.

Users can view their own case load, but not the case load of other users.

A customer and/or business contact can be included in more than one staff person’s case load.

A user may execute a search using their own case load with customized search criteria and data print or export the results to an Excel spreadsheet.
OSOS DATA ENTRY

CREATING AND MAINTAINING THE CASE LOAD

Disabled Veterans' Outreach Program (DVOP) specialists may create their initial case load from past and current DVOP eligible veterans by beginning with a customer search.

Select the Activities tab in the Customer Search window.

Click the Activities button.
Select the following four activities within the **Activities - Webpage Dialog** box:

1. **DVOP Eligible/Service Referral** from the Vet Referrals folder within the L1 State Specific folder
2. **DVOP Assessment Completed** from the DVOP folder within the L1 Veteran Specific Services folder
3. **Follow-Up DVOP Services Completed** from the DVOP folder within the L1 Veteran Specific Services folder
4. **Case Conference** from the DVOP folder within the L1 Veteran Specific Services folder

Click the **OK** button.
Next, click the **Staff** button.

Clicking the arrow next to the **Staff** button will allow DVOP specialists to search for veterans assigned to themselves.
Enter the last name of the DVOP specialist in the **Keyword(s)** data field and click the **Search** button in the **Staff Assigned - Webpage Dialog** box:

Select the appropriate name and click the **OK** button.
The four activities and DVOP specialist’s name will be visible.

Enter a date range in the From and Thru data fields to identify any veteran(s) that received any of the four activities within the desired date range. Since these activities were not yet created, DVOP specialists must not enter any dates before February 9, 2015. If the system identifies too many results to display, then edit the date range to lower the results.

DVOP specialists looking to maintain their existing case load and add newly identified DVOP eligible veterans may choose to do so periodically by adding recent dates. Adding recent dates will help minimize search results that may include veterans currently assigned to the case load.

Click the Search button.
Select the veteran(s) to be added to the case load and click the Add to CL button. The Add to CL button is accessible and available within all tabs of the Customer Search window.

Clicking the arrow next to the Add to CL button will access the Remove from CL option.

Selecting veterans that are already in the case load and clicking the Add to CL button will not create a duplicate listing.

The same availability to add and remove business contacts exists within the Employer module. However, this feature is not available in the Provider module.
To view the case load, click the **Staff** module, then the **Staff Detail** window, then the **My Case Load** tab. To view the updated list, click the **Refresh** button.

It is necessary to click the **Refresh** button to confirm when veterans and business contacts are removed.
Click the **Save** button when finished.

To view both veteran and business contacts in the case load, select **All** from the **Type** dropdown menu. DVOP specialists may select multiple veterans or business contacts, but may not combine individuals from the two types concurrently when adding, removing, or selecting the **Detail** button.
ADDING INDIVIDUAL VETERANS TO MY CASE LOAD

When you are in the veteran’s record, you can add them to the case load. This can be done from the Customer Detail window in the General Info tab. This feature is not available in the Comprehensive Assessment or Services tabs.

The Add to Case Load button is located in the middle of the screen (highlighted below).

Click the Add to Case Load button to add the veteran to the case load.

There is no need to save the record.
After adding the record to the case load, the “Record Saved” confirmation message will briefly appear in the top right hand corner.

The Add to Case Load button will have changed to a Remove from Case Load button.

The availability of the Remove from Case Load button confirms that the veteran has been added to the case load.
The added records will not be visible in the **My Case Load** tab until the **Refresh** button is clicked.
Once the **Refresh** button is clicked, the added veteran’s name(s) will be visible.

Click the **Save** button when finished.
ADDING MULTIPLE VETERANS TO MY CASE LOAD

Multiple veterans can be added to a case load at one time. For example, a group of veterans can be added from a list or spreadsheet containing Social Security or OSOS ID numbers.

A maximum of 200 veterans can be pasted and searched in OSOS at one time. If the list is larger than 200, divide it into multiple groups and add each group separately.
Copy and paste the OSOS ID or Social Security numbers into OSOS and click the **Search** button.

Select the veteran(s) to be added to the case load and click the **Add to CL** button.
REMOVING VETERANS FROM AN EXISTING CASE LOAD
DVOP specialists may remove records from the case load from the My Case Load tab or the General Info tab within the Customer Detail window.

From the My Case Load tab, select the record(s) to be removed and click the Remove from Case Load button.
The **OSOS Error Message - Webpage Dialog** box will appear requesting confirmation to remove the selected record(s) from the case load.

If the record is to be removed, click the **OK** button.

Click the **Save** button when finished.
Select any veteran or business contact and click the Detail button to navigate to the veteran’s or business’ General Info tab.
The **General Info** tab within the **Customer Detail** window has the **Remove from Case Load** button in the middle of the screen. To quickly remove a record from the case load, click the **Remove from Case Load** button.

If the veteran is not included in the case load, then the button displays as **Add to Case Load**.
Once the veteran has been removed from the case load, the message “Record Removed” will appear in the top right hand corner and the Remove from Case Load button will be replaced with the Add to Case Load button.

The availability of the Add to Case Load button confirms that the veteran has been removed from the case load.

There is no need to save the record.
SORTING MY CASE LOAD

The My Case Load tab is automatically sorted by the Date Added column.
The information can be sorted by the headings listed. Clicking on any column header will sort the information. In the example below, the **Name** column was clicked and the information was sorted by the first name in ascending order. Because **All** was selected as the **Type**, the example displays both veterans and business contacts.

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Vet</th>
<th>Type</th>
<th>Date Added</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>599 Malinak</td>
<td>No</td>
<td>Customer</td>
<td>04/14/2015</td>
</tr>
<tr>
<td>All</td>
<td>6.3.01 Malinak</td>
<td>No</td>
<td>Customer</td>
<td>04/14/2015</td>
</tr>
<tr>
<td>All</td>
<td>6.3.03 Malinak</td>
<td>No</td>
<td>Customer</td>
<td>04/14/2015</td>
</tr>
<tr>
<td>All</td>
<td>6.4.00 1/2 Malinak</td>
<td>No</td>
<td>Customer</td>
<td>04/14/2015</td>
</tr>
<tr>
<td>All</td>
<td>Abbott House - Harold Coles</td>
<td>Customer</td>
<td>Employer Contact</td>
<td>05/01/2015</td>
</tr>
<tr>
<td>All</td>
<td>ABC International - Ben Vaneer</td>
<td>Customer</td>
<td>Employer Contact</td>
<td>05/01/2015</td>
</tr>
<tr>
<td>All</td>
<td>Albanyveteran Malinak</td>
<td>Yes</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>B J Malinak</td>
<td>No</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>Bennc Malinak</td>
<td>Yes</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>Daniel Malinak</td>
<td>Yes</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>DHP Malinak</td>
<td>No</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>Ethnicity Test12.1 Malinak</td>
<td>No</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>EthnicityTest Malinak</td>
<td>Yes</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>Hopelessly Lost</td>
<td>Yes</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>Jackee Malinak</td>
<td>Yes</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>Jeffrey Malinak</td>
<td>Yes</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>John Malinak</td>
<td>Yes</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>Jumper Malinak</td>
<td>Yes</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>Lt Malinak</td>
<td>No</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
<tr>
<td>All</td>
<td>Literacy Malinak</td>
<td>Yes</td>
<td>Customer</td>
<td>11/09/2015</td>
</tr>
</tbody>
</table>
Clicking the **Name** column a second time will reverse the sorting so that it appears in descending order.
PRINTING AND EXPORTING MY CASE LOAD LIST

From the My Case Load tab, click the Print button to either print or export the case load.

Only the four visible columns from My Case Load will print or export to the Excel spreadsheet.
To print, click the **Print** button.

To export, click the **Export** button.

When printing, the **Print** pop-up will appear. Select the desired options and click the **Print** button.
The **Export** button will navigate the user to the **Save/Open File - Webpage Dialog** box. When exporting, there are two options:

1. Save As
2. Open

Selecting **Open** and clicking the **OK** button will immediately open the case load in an Excel spreadsheet. Once the Excel spreadsheet is open, it may be saved to the desktop or any preferred folder.

Selecting **Save As** requires the entry of a **Directory** and **File Name**.

If the **Directory** is known, it may be keyed into the data field.

If the **Directory** is unknown, click the **Browse** button:
The **Browse For Folder** pop-up will appear

**Scroll through the folders and select the preferred folder or create a new folder.**

Click the **OK** button.
Enter a unique name for the file and click the OK button:

After clicking the OK button, the file will not automatically open. It is necessary to open Excel and select the spreadsheet from the folder.

The columns will need to be resized to view the data. The Count at the bottom of the spreadsheet provides the number of individuals in the case load.
CUSTOMIZING THE EXPORTED MY CASE LOAD EXCEL FILE

If additional information is desired, such as the city where the veteran resides, telephone number, or email address, run a search and include My Case Load in the Customer Search criteria.

To begin searching for specific veterans, first click the Options button at the bottom of any Customer Search tab to access the Customer Search Result Columns - - Webpage Dialog box.
Select the information for the spreadsheet by checking the box next to the desired data.

Select a number to designate the order in which the information should appear.

These preferences may be saved for future searches by checking the box next to **Set as My Defaults** and clicking the **Save** button.

As the information and order are selected, it will appear in the column header.
Navigate to the **Customer Search** window and the **List Search** tab.

Select the **My Case Load** option.

Click the **Lookup List** button.
The DVOP specialist’s caseload will appear as the only list.

Select the list.

Select My Case Load list
Additional search criterion may be added to reduce the results to a portion of the records in My Case Load.

For example, DVOP specialists assigned to multiple offices may prefer to limit the search results to veterans in a specific office. This can be done within the Geographic tab and selecting the desired Assigned Offices.

After the search criteria has been selected, click the Search button.
One or more customer records can be selected and exported to an Excel spreadsheet by clicking the arrow next to the Search button and following the steps described earlier in this guide.

RESOURCES AND ASSISTANCE
Additional program information, OSOS guides, and other resources can be found at:
https://labor.ny.gov/workforcenypartners/osos.shtm

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