

## Facilitator Guide

- *Actual Training will take approximately 6-7 hours (not including breaks and lunch)*
- *Recommendations for timing: Start Time: 9:00 am, Break #1—approx. 10:30 am (ideally after Activity 3) , Lunch: between 12:00 and 12:30 (ideally after Activity 8), Break #2—between 2:30 and 3:00, End Time: 5:00*

### ❖ Facilitator will greet trainees and introduce yourself as facilitator

### ❖ Explain NYESS

- NYESS New York Employment Services System (NYESS) is a computer system which helps all of a customer's service providers work together to help the customer find, get, and keep a job. This new employment system will serve as a single point of access for all New Yorkers seeking employment and employment supports, regardless of an individual's (dis)abilities and regardless of the state agency system from which they receive employment services/supports. NYESS consists of the NYS Department of Labor's One-Stop Operating System (OSOS), which connects job seekers with employment opportunities in the NYS Job Bank, as well as a data warehouse of employment-related information operated by OMH, which will receive information from a variety of other systems - including OSOS - and have the capacity to run reports and provide analysis. **Today's training is focused on the entry of data into OSOS.** Training for all NYESS users on how to use the information entered into OSOS will be provided in the near future, primarily via webinar.
- NYESS will replace the current New York Interagency Supported Employment Report (NYISER) system, currently used by OMH, OPWDD, ACCES-VR, and CBVH. All demographic information regarding individuals contained in the NYISER system will be ported over to the NYESS system. Unlike NYISER, users of NYESS will be able to run their own reports on data entered into the system.
- The development of the NYESS system is made possible through a Medicaid Infrastructure Grant (MIG) from the Federal Centers for Medicare and Medicaid Services (CMS) that OMH administers. Prior to development of NYESS, the MIG funded NYS' participation in a national media campaign geared toward engaging employers in hiring individuals with disabilities. **(Pointing to the "Think Beyond the Label-Evolve Your Workforce" materials in the packet)** This campaign, called Think Beyond the Label, directs businesses/employers to a website to help them find job seekers with disabilities to hire. However, NYS currently has no single system for connecting job seekers with available jobs - but rather multiple, segregated system that serve individual populations of New Yorkers with

disabilities seeking employment. To respond to businesses seeking to hire people with disabilities in a timely manner, NYS is developing the NYESS system, which will serve as NYS' comprehensive job matching/employment supports coordination and data system – breaking down the siloed, segregated systems that exist currently.

- Providers of employment services using NYESS will be able to see which other providers of employment services an individual job seeker is working with, providing the opportunity to coordinate with one another to best meet the job seeker's employment goals. **(Use as segue to introductions of trainees).**
- **Facilitator will ask trainees to introduce themselves** (name, organization's name, geographic location of services provided, and individual's role in the organization)
- **Facilitator will point people to the "NYESS; The Employment System for New Yorkers of all Abilities" pamphlet**
  - The NYESS system requires the consent of individual job seekers
  - Consent Form and Confidentiality:
    - Consent is mandatory for NYESS participants
    - Hardcopy forms must be retained by the provider
    - Note third page of Exhibit H document: staff must validate identity of participant
    - Staff must maintain security of data by appropriately using the system (i.e. don't look up your neighbor) and using reasonable care (such as logging off when leaving desk)
  - The NYESS pamphlet includes information that can be helpful in educating various stakeholders in understanding the benefits of gaining consent from job seekers to participate in the NYESS system
  - Job search - inclusion in NYS DOL's Job Bank, containing approx. 90,000 jobs; 3000 jobs are entered and removed from Job Bank in the same day, every day; Unless people are using NYESS, they will miss out on these jobs
  - Resume building capacity
  - Exploring careers using JobZone and CareerZone, which automatically populate the OSOS/NYESS system – coming soon

- Matching skills to jobs in the Job Bank using the Skills Matching And Referral Technology (SMART) – coming soon
- Getting tax credits – New Yorkers leaves \$830M in unclaimed Earned Income Tax Credit (EITC) funds each year. NYESS includes referral capacity to free tax preparation services
- Ticket To Work – Providers of employment services registered as Employment Networks (EN) with SSA have great difficulty claiming milestone payments for having assisted individuals with disabilities with a Ticket To Work achieve certain employment milestones – paperwork (providing copies of pay stubs) is quite burdensome and challenging. Result is that NYS ENs only claim a very small fraction of milestone payments for the 800,000= NYers with a Ticket To Work. The NYESS system will serve as NYS’ administrative EN, meaning that any providers of services entering data related to services they provide to individual Ticket To Work holders will be paid when the individual reached employment milestones – providers will need to do nothing more than document services provided into NYESS. It is estimated that NYS providers could bring in substantial additional revenue to bolster employment services programs.
- Health Insurance – NYESS will greatly assist in identifying individuals who likely qualify for the Medicaid Buy-In program for Working People with Disabilities (MBI-WPD). Working with DOH, NYESS will streamline enrollment in MBI-WPD to avoid involvement of local DSS offices/HRA in NYC, where enrollment in the program has proven challenging for many. This will allow additional individuals with disabilities to take advantage of the ability to make up to \$55K/year and have up to \$15K in assets, and to retain their Medicaid eligibility
- Helps to coordinate benefits by creating the ability to make referrals to benefits advisors - a community of experts in benefits advisement developed through the MIG available to meet one-on-one with assistance to job seekers navigating the complex systems of benefits

### ❖ Go over housekeeping items

- Restrooms are located\_\_\_\_\_
- 2 -15 min. breaks and a 30 min. lunch
- Silence phones...take calls out of the room

### ❖ Facilitator will describe Training

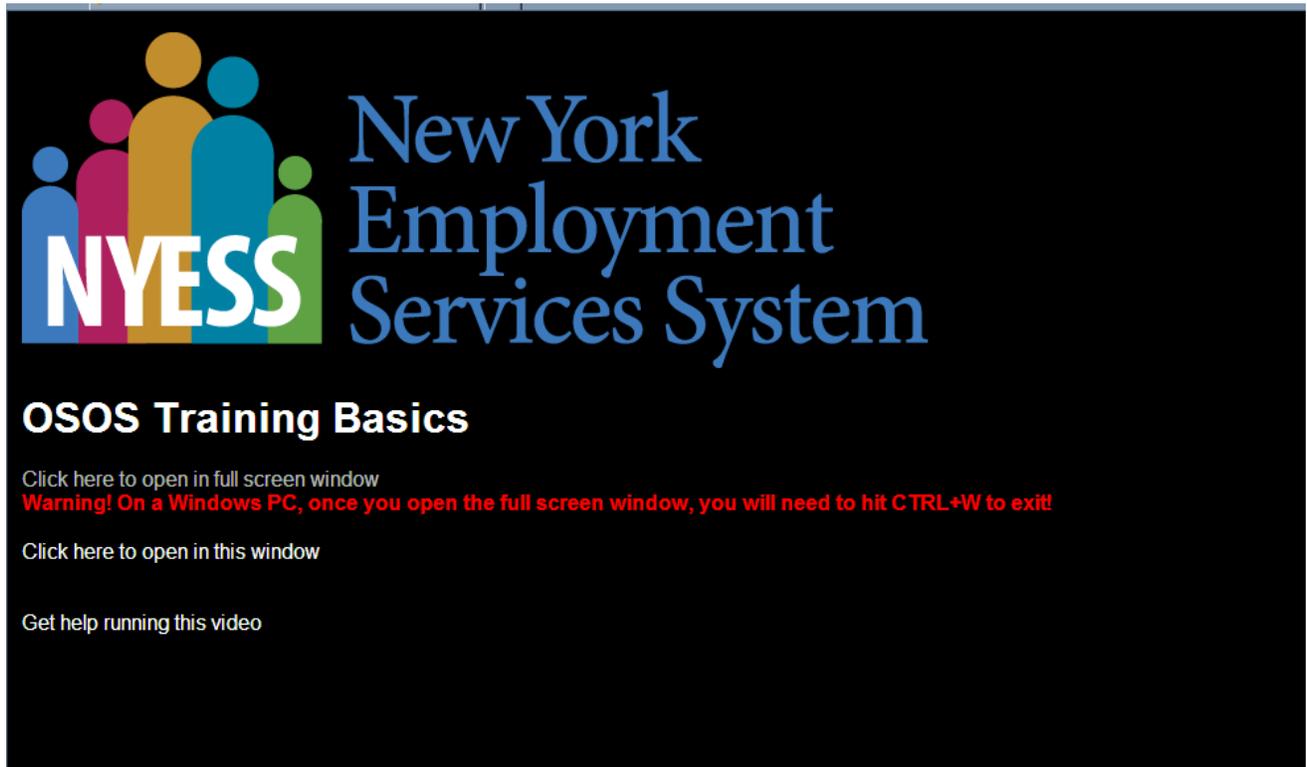
- Training – combo of video and hands on activities-15 sections/hands-on activities between each in OSOS training site (URL in packet)
- The OSOS Training Site exactly like live site with no real customers. It will be available as long as you need it. Activities – hands on in training site. Packets - Resources for today and useful for future
- Two different case studies in packets randomly placed. Your neighbor may not have the same case study customer
- **Please pay close attention to video as it is playing, activities are based directly on what you have just seen. The video is about a separate case study customer. Please do not try to enter info about the video customer while the video is playing**

***Below are instructions on starting and navigating the training video:***

***When accessing training video from CD, double click on "StartUp" (HTML Document)***

Name	Size	Type	Date Modified
nyess_src		File Folder	10/13/2011 3:09 PM
Autorun	1 KB	Setup Information	10/3/2011 3:22 PM
help	3 KB	HTML Document	10/13/2011 3:04 PM
StartUp	2 KB	HTML Document	10/13/2011 2:17 PM

***This will open the NYESS OSOS Training Basics StartUp screen:***



**OSOS Training Basics**

Click here to open in full screen window  
**Warning! On a Windows PC, once you open the full screen window, you will need to hit CTRL+W to exit!**

Click here to open in this window

Get help running this video

***Instructions to StartUp screen:***

- ***"Click here to open in full screen window" is best for showing video on a projector screen***
- ***"Click here to open in this window" is best for showing video on your computer monitor***
- ***"Get help running this video" will lead you step by step***



***NYESS OSOS Training 101 Basics Welcome Screen (If showing video in a group training, keep this screen open as trainees are entering)***

- ***To start the video, click the arrow  on the bottom right of the screen, or press the letter P on your keyboard.***
- ***Use the small arrow  on the bottom left to toggle between play and pause. This function only works while the video is playing (This arrow will not start the video from a Title screen.***
- ***The numbers  on the bottom of the screen will take you to the Activity screen for the previous section.***
- ***While on the Activity screen, click the arrow  on the bottom right to start the next section.***
- ***To start Closed Caption, click the small cc button  on the bottom right of the screen. Click the same button to close Closed Caption.***
- ***To open the Table of Contents, click the TOC button  on the bottom right of the slide. Click on any section to start video at that point. To close the Table of Contents, click the TOC button once again.***
- ***Click the question mark  on the bottom of the slide to open “NYESS OSOS Training FAQ & Troubleshooting.”***

❖ **Facilitator will start Training Video Section 1**

❖ **Facilitator will Recap Section 1 of video:**

- Some basic questions were answered regarding NYESS
- We learned to log into OSOS
- We learned OSOS basic screen structure
- **Recap one important point from the video:** New individuals should be entered into OSOS when receiving pre-employment services or employment support services

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 1**

- To start the first activity, find the **Case Study Activities Guide** in your packet. You will use this guide for every activity. Read the information carefully, follow the steps and use the hints
- We will practice **logging into OSOS** using your Username and password assigned for today's training
- Your username **and password are for the OSOS Training site only** and will **not** be your username and password for the live site
- Show "**System Navigation & Design**" handout for help in practicing

❖ **Facilitator will start Training Video Section 2**

❖ **Facilitator will recap Section 2 of video:**

- Margaret searched for her customer James Lowe in OSOS
- She did not find James in the system

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 2**

- Now it's time for you to try searching for a customer.
- Show the **“Searching for a Specific Customer in OSOS”** handout from packet
- Let's search for our customer James Lowe
- On the screen is some personal information for James
- Start by searching with Jim's SSN
- Remember, the search button is at the bottom of the screen
- Did you find Jim in the system?

***\*\*Facilitator Note: James Lowe will not come up when searching with his SSN.***

- Try searching by other criteria. You can search by using more than one
- Now try searching for your county to see if a record comes up.

❖ **Facilitator will start Training Video Section 3**

❖ **Facilitator will recap Section 3 of video:**

- Margaret created a new record for her customer
- She entered some basic information
- She changed the status to pending in order to save the record without all the required info
- She saved the record
- She scheduled an appointment for Jim based on their phone call
- She logged out before she left her desk for another appointment

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 3**

- From this point on, you will be entering info based on your own **“Case Study Customer”**
- **In this activity you will enter a new customer record, but as a best practice you should always search the system first for the customer**
- Turn to activity 3 in your guide and use the **customer intake form** to search for your customer
- Now go ahead and create a new record using only the information on the intake form. This is all the info you have for your customer at this point
- **Note:** in the **Contact Preferences Section**, check the information you want to show up on an OSOS generated Resume, for example **“Use Postal”** will populate an address. Be sure to only check those that have corresponding info in the system or you will get an error message
- Once you are done, **schedule an appointment** based on the sticky note on the intake form. Use the 2011 calendar in your packet

***\*\*If it is approx. 10:30 am or 1.5 hours after start time, this is a perfect time for break (video says to logout when leaving computer area unoccupied)***

***\*\*After break, ask who remembered to logout when leaving computer area and discuss "Security Protocol" at this point***

❖ **Facilitator will start Training Video Section 4 (Approx. 10:45)**

❖ **Facilitator will recap Section 4 of video:**

- Jim arrived at his appointment
- Margaret selects Jim's appt. in the Staff Inbox and clicks Detail
- Margaret updates his record by filling in some missing info in the General Info Tab and Add'l info tab, then saved the record

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 4**

- For this activity we will update a customer's record
- Since you **logged out** in the last activity, **log back in** using the same user ID and password
- Open the customer record by **selecting the appointment** and **click on Detail**
- Now complete the rest of the information on the **General Info** and **Additional Info tabs** using the info from the activity guide
- Then **save** the record

❖ **Facilitator will start Training Video Section 5**

❖ **Facilitator will recap Section 5 of video:**

- Margaret used the O\*Net tool in OSOS and O\*Net on-line to choose an O\*Net title for Jim's last job

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 5**

- Show the "**O\*Net Frequently Asked Questions**" handout in the packet
- Refer to your activity guide under Activity 5 for your customer's job title
- Select a job title and review the **Details tab** and the online resources to find the most appropriate job title for your customer's last job
- To add that job title click **Select**
- **Do not save** – the system will require the rest of the job info in order to save

❖ **Facilitator will start Training Video Section 6**

❖ **Facilitator will recap Section 6 of video:**

- Margaret completed the job entry info on the work history tab for Jim's job at ABC Office Supplies

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 6**

- Now we'll complete your customer's **work history**.
- Complete the job entry that we started in **Activity 5** by referring to the information in your case study under Activity 6
- Add additional job entries if you have time
- Don't forget to **save** the record

❖ **Facilitator will start Training Video Section 7 ( approx. 11:40 am)**

❖ **Facilitator will recap Section 7 of video:**

- Margaret filled in all the remaining fields in order to save the record as **active**
- She entered info on the **Educ/Lic tab**, the **Skills tab** and the **Objective tab**
- She changed the status to **active** and **saved the record**
- She viewed **Jim's resume**

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 7:**

- In this activity we'll **complete the remaining fields** by using information in your case study
- Enter info. in the **Education and Licenses tab**, **Skills tab** and the **Objective tab**
- Be sure that all required information is entered in the **General Info** and **Additional Info tabs**
- Change the **Job Seeker Status** according to your case study info
- Change the record Status from **pending** to **Active** and **Save** the record. **\*In order to perform other functions in OSOS from this point on the record must be Active**
- Finally, view the **Resume** by clicking the **Resume button** at bottom

❖ **Facilitator will start Training Video Section 8 (approx. 12:00 noon)**

❖ **Facilitator will recap Section 8 of video:**

- Margaret entered **employment related case notes** in the **Comments** section using the helpful model
- She saved the record

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 8:**

- Use the information in your case study activity guide and the **“SENSE model”** in your packet which is an expanded version of the one on the video
- **Enter employment related case notes** in the **Comments** section
- Be careful not to include **Protected Health Information**
- **\*Important** to try to enter case notes day of the activity because the system will date the note with the present day automatically. **If you cannot**, include the date of the actual service within the case note
- **Save** the Record

**Activity 8 Discussion** (Immediately after)

- Facilitator will ask someone to read the comments entered for Andrew & Abbey
- Discuss what they have written
- Discuss the samples on the screen for Abbey and Andrew

**LUNCH: Approx. 12:30 pm**

***(This is the best stopping point for a lunch if possible)***

❖ **Facilitator will start Training Video Section 9 (approx. 1:00 pm)**

❖ **Facilitator will recap Section 9 of video:**

**Section 9 Recap:**

- Margaret's agency was already activated in OSOS
- Jenny had to enroll her agency into the system
- Steve had to make his active from inactive

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 9:**

- For this activity, you will be **enrolling your agency** so that services can be added to a customer record (**most trainees will be contractors**)
- **It's important to note that when you are enrolling/activating your agency to this customer's record, you are not adding your agency into the system. In effect you are linking the agency to your customer**
- Once you're in the Services window, follow the steps in the guide to enroll your agency
- Remember that clicking the **Services button** at the bottom of the screen will bring up the most current record
- **Save** the record

❖ **Facilitator will start Training Video Section 10**

❖ **Facilitator will recap Section 10 of video:**

- Margaret added a pre-employment Service to Jim's record

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 10:**

- Use the "**Provider Name**" handout in packet
- Now that your agency is enrolled, you can **add a service**
- Again referring to the activity guide, add a service based on your customer information, by following the instructions and using the hints
- Don't forget to **save**

❖ **Facilitator will start Training Video Section 11 (approx. 2:00 pm)**

❖ **Facilitator will recap Section 11 of video:**

- Margaret funded the pre-employment service she entered in Section 10 using \$1.00 as a tracking placeholder
- She refreshed the data to view the most current
- She viewed the service history for Jim in the **Services History Tab**

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 11:**

- In this activity, we will **fund the Service** we just entered in **Activity 10**
- Follow the instructions in your guide to fund the service
- **Save** the record
- **Refresh** the data

❖ **Facilitator will start Training Video Section 12**

❖ **Facilitator will recap Section 12 of video:**

- Margaret entered point in time activities from the NYESS folder to Jim's record
- She save the record
- She viewed the activities by clicking the Activities Tab

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 12:**

- Now let's **add point in time activities** by referring to your guide and following the steps provided.
- Click on the **Activity button at the bottom** of the screen
- Remember, you should only add activities from the **NYESS folder**.
- Look in your folder for the spreadsheet on Definitions of Activities to help you choose the correct option for your customer **(if available?)**

***Approx. Time: 2:45***

***Break: 2:45 - 3:00***

❖ **Facilitator will start Training Video Section 13**

❖ **Facilitator will recap Section 13 of video:**

- Margaret recorded the service hours she spent working with Jim
- She verified the total hours were correct
- She saved the record

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 13:**

*\*\*Go over the week structure—Weeks run from Sunday-Saturday, For April 2011 week 1 begins on the 1<sup>st</sup> Sunday of the month so the 3<sup>rd</sup> through the 9<sup>th</sup> will be week 1. There are 4 weeks in April—the 1<sup>st</sup> and the 2<sup>nd</sup> fall in the last week of March. Also explain May 2011 (5 full weeks even though the last week has 4 days in June.*

- Now that you have added activities, you can **track the service hours** you spent on the activities/service
- **In Activity 12**, you will find time spent on each activity in brackets at the end of the case notes
- Use the “**2011 Calendar**” handout and the flip side “**Minutes to Decimals Conversion Chart**”
- As a good practice, you should record your service hours as you enter your activities

❖ **Facilitator will start Training Video Section 14**

❖ **Facilitator will recap Section 14 of video:**

- Since Jim has received a job placement, Margaret closed the Pre-employment service
- She then opened a new Service for Jim
- She funded a new employment service for Jim
- She entered the employment placement on the Jobs Info tab
- She saved the record

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 14:**

- First find the **“Jobs Info Tab Enrollment/Termination Reason List”** handout to help you choose the correct **Enrollment type**
- **Close the pre-employment service** for your customer
- **Open a new service** according to your case study like you did in **Activity 10** only this time don't choose pre-employment service
- **Fund the Service** like you did in **Activity 11**
- Enter employment placements in the **Jobs Info Tab** using **O\*Net tool** like you did in **Activity 5**

❖ **Facilitator will start Training Video Section 15**

❖ **Facilitator will recap Section 15 of video:**

- Margaret entered Job Termination Info
- Since Jim no longer needed the non-job site delivered support service, Margaret closed the service by entering a job termination reason and a job termination date

❖ **Facilitator will ask if there are any questions on what they have just seen**

❖ **Facilitator will describe Activity 15:**

- Use the **Jobs Info Tab Enrollment/Termination Reason List** handout to choose the correct Job Termination Reason
- In this activity we will **enter Job Termination information** for your customer.
- Then **close the employment service.**

**End of Video: between 4:00 & 4:30**

❖ **Facilitator will give Closing Comments:**

- Thank trainees for attending
- Practice using the **OSOS training site** with case studies, video, and handouts.
- Most current resources will be available on **NYESS website** ([www.nyess.ny.gov](http://www.nyess.ny.gov)) including:
  - Contents of today's packet
  - Both case studies—use them to practice
  - Link to training video
  - Link to OSOS Training Site

❖ **Facilitator will ask trainees to complete the evaluation for today's training.**

***End—5:00 pm***