Case Study 1

*** **Disclaimer**: This is a fictional case study and does not contain any actual customer data ***

Logging into OSOS

1) Log in to OSOS using the training username and password you have been assigned for today's training

Hints:

- ✓ **Usernames and passwords have been created for today's training and can be used in the OSOS Training Site**
- ✓ Please keep in mind that you will have to request an account to be created by your Security Officer/Manager in order to enter data in the NYESS case management application (OSOS production) for real customers

Searching for an Individual

1) Navigate to the "Customer" module, "Customer Search" window - by default, you are on the "Quick Search" tab
2) Search for James Lowe using the information displayed on the screen
3) You should search by his Social Security Number first
4) Then you can try searching for him by using any of his other data in combination with his name
5) Try multiple ways of searching and compare Jim's information to any record that displays in your search results

Hints:

- ✓ Since this is the training environment, the information you enter will not affect any actual customer data
- ✓ Remember, the "Search" button is at the bottom of the screen
- ✓ To view a customer record, select it from the list of search results and click the "Detail" button at the bottom of the screen
- ✓ Searching by using the SSN and/or NY# overrides all other search criteria. As a result, you must clear these fields before using other search parameters.

Creating a New Record- General Info

1) First search for your customer below from the “Customer” module, “Customer Search” window
2) To create a new record, return to the “Customer Search” window and click the “New” button
3) On the “General Info” tab, **use the customer intake form below** to complete as many of the fields as possible (Enter the customer’s first name as Abbey and use your last name as the customer last name) **ONLY USE THIS INFORMATION- DO NOT fill in fields where information is NOT yet given**
4) Change the “Status” on the “General Info” tab to “Pending” in order to save the record without entering all of the required information- **DO NOT fill in Job Seeker value at this point**
5) Complete the “Gender” field. Click on the “Ethnic Heritage” and “Race” button to add these values
6) You must create a Username and Password or the record will not save (Use the information listed on the screen)
7) Complete the information in the “Education & Employment” box
8) Since Abbey provided her primary phone number, enter her phone number. Since she prefers to be contacted by email, check the box “Email” in the “Contact Preferences”
9) Click “Save”

Hints:
- ✓ Your customer has disclosed the information below
- ✓ **A sample Username and Password has been highlighted on the screen**
- ✓ The SSN and Ethnic Heritage and Gender are now located in a radio button for added security

Social Security Number: 000-AA-MMDD (AA= your age, MMDD =your birth month and date)

If you do not have an SSN, check here: ☐ **Gender: Male** ☐ **Female** ☒

Name: [Your Last Name], Abbey **Date of Birth:** 2/19/1989

Address: 120 Maple Ave. **City:** Niagara Falls **NY** **Zip Code:** 14325

Phone Number: 716-454-1234

Education Level & Status? IEP Diploma, not attending school

Employment Status? Not employed

CONTACT INFO:
Abbey’s e-mail address is abbeykat203@hotmail.com and since she often monitors her e-mails, this is a preferred contact method. She can also be contacted by phone at (716) 454-1234.

DISCLOSURE:
Abbey is a twenty-five year old Caucasian woman. She has no issue disclosing her gender, race, and ethnicity (not Hispanic or Latino) in this system.

Activity 4 Creating a New Record- Additional Info

1) On the "Add'l Info" tab, complete the "Disability Status" field for your customer. (Remember, for the purposes of NYESS, even if a customer discloses having a disability in the "Disability Status" field, "Not Disclosed" should always be selected in the subsequent "Disability Category" drop-down field
2) Complete the "Migrant/Seasonal Worker" section
3) Complete the "Military Service" info **ONLY if you know this information for certain**
4) Save the record

DISCLOSURES:

Since Abbey realizes she may need some accommodations in the hiring process, she explains that she has physical (cerebral palsy) and mental (experiences psychiatric symptoms) disabilities. Any accommodations she may need should be documented **later** in the "Comments" section of OSOS.

Abbey is **not** a Veteran or a Migrant/Season Worker.

Hints:

- ✓ Do not enter any Protected Health Information (PHI) anywhere in OSOS
- ✓ Keep in mind that there are required fields in OSOS which must be disclosed by the customer: "Gender," "Race," "Ethnic Heritage," "Disability Status" and "Disability Category." Even if you know or believe you know this information, it must be self-reported by the customer (for the purposes of this activity, the customer is disclosing this information)

Activity 5 Creating a New Record- Programs/PA

1) In the "Pgms/PA" tab, enter info for any public assistance your customer receives (for the purposes of this training, enter today's date for all programs/benefits your customer is receiving and/or participating in)

DISCOLSURES:

☐	SSI	☐	Home Relief
☐	SSDI	☐	General Assistance
☒	Medicaid	☐	Refugee Cash Assistance
☒	Food Stamps		

Hints:

- ✓ Only complete the "Public Assistance" section
- ✓ If you are unsure what day your customer began receiving "Public Assistance" but you have documentation that your customer is currently receiving PA, record today's date.

Creating a New Record- NYESS Info

1) In the “Customer Detail” window, on the “NYESS Info” tab, enter the Medicaid ID Number if your customer receives Medicaid by clicking on the “Add” button to add a new Medicaid ID Number

DISCLOSURES:
She confirms she is still receiving Medicaid and that her Medicaid ID Number is #FN34389Z.

Creating a New Record- Objective & Exploring O*Net

1) Enter the “Employment Objective” and “Acceptable Job Locations” information on the “Objective” tab
2) Click on the “Add a Job Title”
3) Click on “O*Net Titles”
4) Try searching for a corresponding job title by entering different keywords in the “Keyword(s)” field and clicking on the “Search” button
5) Locate the O*Net title that most accurately matches Abbey’s desired position (O*Net Code= 99999999 or O*Net Title= (For API-use Only) is the default for individuals who have not yet determined an Employment Objective)
6) Click on the “Details” tab of the “O*Net Webpage Dialog” box to view more details about this job and utilize the online resources to get more information
7) Click on the title to highlight and then click the “Select” button to add it to “Desired O*Net”

OBJECTIVE:
After her last placement, Abbey has decided that she is interested in working in **retail or an office setting doing stocking, filling, and customer service.**

JOB LOCATIONS:
Abbey is extremely close with her family, and lives with her mother Lin and Lin’s fiancé, Pete, in Niagara Falls. Her brother Stephan lives nearby in Niagara Falls also. Her family is willing to provide assistance with transportation and other supports as needed. The family has lived in Niagara Falls for Abbey’s entire life. Abbey is easy to talk with and very connected to her family. **Abbey does NOT have a driver’s license** and she relies on her parents for her primary transportation. Her family can drive Abbey to **any job within 25 miles of her home address**.

Hints:
- ✓ Try using full or partial keyword searches to find the most appropriate O*Net job title
- ✓ Additional information for any selected O*Net title can be accessed by highlighting one of the “Internet Resources” from the “Details” tab of the O*Net webpage dialog box and clicking “Go” - This will be helpful to outline a customer’s skill set on the OSOS “Skills” tab and on a customer’s resume

Creating a New Record- Work History

1) On the “Work History” tab, select “New Job Entry” and use the information below to complete Abbey’s work history
2) Once you are finished, save the record

Hints:

- ✓ The green-dotted fields must be completed to save a new job entry in OSOS – fill out as much information as possible
- ✓ Include the “Job Type” even though it is not a green-dotted field
- ✓ **If the wage for a job entry is not known, enter “$0.01” in the “Wage” field and select “Other” from the drop-down field to the right of the “Wage” field**
- ✓ For purposes of NYESS, the only reasons that should be selected for “Reason for Leaving” are: Fired, Lack of Work, Medical/Health, Other, Quit, Retired, Still Employed and Strike
- ✓ If the customer’s reason for leaving a job is not listed under the “Reason for Leaving” drop-down listing, select “Other” for this field
- ✓ As a general rule, try to list at least three duties in the “Job Duties” field
- ✓ In the “Work History” tab, dates are entered as mm/yyyy
- ✓ If you would prefer that a particular job not show up on the customer’s OSOS generated resume, unclick the “Include Online” box in the “Detail” section on the “Work History” tab

Abbey’s Work History

Job Title: Child Care Assistant
Employer: Sunshine and Rainbows Children’s Center
Location: 1717 Clear Skies Path, Niagara Falls, NY
Dates: 01/2011 – 03/2011
Duties: Entertaining the children, assisting in dismissal of the children, distributing snacks
Wage: $7.25/hr
Hours Worked Per Week: 15
Reason for Leaving: Abbey was uncomfortable working in this setting without direct job coaching. She has since redefined her career goals to not include working with children.

Job Title: Stock Clerk
Employer: Scholastic Books
Location: 2 Barrett Browning Lane, Seneca, NY
Dates: 09/2010 – 10/2010
Duties: Filing, packing and stocking
Hours Worked Per Week: 10
Reason for Leaving: Temporary internship placement

Job Title: Cleaner
Employer: McDonald’s
Location: 327 Golden Arches Parkway, Amherst, NY
Dates: 04/2010 – 04/2010
Duties: Cleaning and stocking
Wage: $7.25
Hours Worked Per Week: 15
Reason for Leaving: Temporary internship placement

Activity 9

Creating a New Record- Ed/Lic

1) Add any applicable information for your customer in the “Driver License,” and “Certificates/Licenses” and “Schools” sections of the “Ed/Lic” tab (Click “Add School” to add education information)

EDUCATION:
Abbey graduated with an **IEP diploma in December 2010 from Summit Academy**, a special education school located in Buffalo, NY.

DRIVER LICENSE:
Abbey **does not** have her driver license and relies on her parents for transportation.

Activity 10

Creating a New Record- Skills

1) Navigate to the “Skills” tab and enter any skills your customer has in the “Additional Skills Text” free-form text box

SKILLS:
The people who worked with Abbey reported that she is a very hard worker who is willing to try anything related to work. She received positive responses from her vocational coaches, who described her as a “sociable, well-mannered potential employee.”

One surprise in the discovery process was her **computer skills in using email, entering lists of email addresses, light data entry using Microsoft Office and Excel**, as well as her ability to text her friends.

Activity 11

Saving an Active Record & Viewing a Resume

1) Once all of the required information has been added, return to the “General Info” tab and update the “Jobseeker” status to either “Active” or “Inactive” and change the record “Status” from “Pending” to “Active”
2) Save the record
3) Once the record is saved, click on the “Resume” button on the bottom of any screens in the “Customer Detail” window to view Abbey’s resume

Hints:

- ✓ If any required fields are missing, you will be prompted to enter this information before the record can be saved as active
- ✓ When working with actual customers, you may print the resume by clicking the “Print” button at the bottom of the resume to use as a starting point in developing a professional resume (Please do not click print during today’s training since it will not print)

Activating an Agency

Before you can add services for your customer in OSOS, you will need to activate an agency. For today's training, you will activate **your own agency** using these steps:

1) To activate an agency, navigate to the "Services" window via the button on the bottom of the screen
2) You should, by default, be on the "Agency Info" tab – if not, click on the "Agency Info" tab
3) Click on the "New Agency" button – the New Agency fields are now activated
4) Select your agency from the "Agency" drop-down field
   - If you work directly for a state agency, choose your agency
   - **If you are contracting with a state agency but do not work directly for a state agency, choose "Contractor"**
5) Enter the "Intake Date" and the "Enrollment Date" (both are the date when your agency first started working with a customer – in Abbey's case, this date is **4/7/2011,** enter this date for both)
6) Save the record
7) Refresh it by clicking the "Customer Detail" button and then on the "Services" button to re-enter the "Services" window – your agency should be listed as active

Hints:

- ✓ Remember not to enter any information in the "Termination Date" or "Termination Reason" fields since this will inactivate your agency
- ✓ If your agency is already listed and active on your customer's record, you do not need to activate your agency again
- ✓ If your agency is already listed and inactive on your customer's record, highlight it and remove the "Termination Date" and "Termination Reason" to reactivate your agency so services can be added

Adding a Service

After your first meeting and further discussion with Abbey and her family, the consensus is that while Abbey is at the point where she would like to start looking for work, some pre-employment services will be necessary before she can do so (e.g., assessments, resume review, career exploration, etc.). You have determined to add a Pre-employment Service to Abbey's record

1) In the "Services" tab of the "Services" window, click "New Service" to add a new service
2) You are now in the "Provider" module/"Offering Search" window/ "Quick Search" tab – click on the "General Info" tab
3) In the "Location" box/"WIB" field, select "NYESS Provider Default"
4) Type your provider name in the "Provider Name" field- you only need to type the first 5 letters to obtain just your Service Organization (Provider) results
5) Click "Search"
6) Select the NYESS Pre-employment Service from the list of results and click on the "Schedule" button to add it to your customer's record
7) You will be navigated back to the "Services" window, where your service will be added and highlighted, and the "Detail" box fields will be activated for data entry
8) Every service in OSOS requires a **planned start date**, a **planned end date** and an **actual start date** – type in **4/7/2011** in the "Plan. Start Date" and "Actual Start Date" fields and type in **7/7/2011** in the "Plan. End Date" field as a plausible end date for the service
9) All services require a program service type to be selected – since all NYESS services are intensive, make sure "Intensive" is selected from the drop-down "Program Service Type" field
10) Save the record – the service must be saved before funding can be added (**Activity 14**)

Hints:

- ✓ Adding information in the "Actual End Date" field will close the service – do not enter this information at this time
- ✓ For all NYESS services, do not add any information in the "Completed Successfully" field

Note:

- ✓ If there is only one Service Offering available when clicking on search, the "Offering Detail" window will automatically appear. Click on the "Return to Search" button at the bottom right of the screen to switch back to the "Offering Search" window. Now the "Schedule" button will be visible.

Funding the Service

Now that you have added a service in **Activity 14**, you will need to fund the service for tracking and reporting purposes. There are seven agency funding streams available for NYESS: OMH, OPWDD, OASAS, NYSCB, SOFA, ACCES-VR, and TTW (some of these have multiple specific types associated with them). Since your employer contracts with one or more of these agencies, you will have access to at least one and up to seven of these funding streams. Your training account has been set up so that you have access to the same funding streams you will see when working with actual customers.

For today's training, follow these steps to fund the service with an appropriate funding stream available to your office:

1) In the "Funding" box of the "Services" window, type "1" in the "Total Funding" field- it will be auto-formatted by the application
2) Click on the "Add" button
3) From the "Funding Webpage Dialog" pop-up window, click on the "Level" column header to sort by funding level. You will select from the various "Local Office" streams.
4) Select an appropriate available funding stream
5) Type "$1" again in the "Obligated Amount" field and click "OK"
6) The service is now funded – click "Save"
7) Once you save the record, a "Verification" pop-up window will appear – review the information to ensure that it is correct. Corrections to the data fields may be made from this page
8) Click "OK" on the bottom of the window
9) To refresh the data, click out of the "Services" window by clicking the "Customer Detail" button, then "Services" button (both at the bottom of the screen)

Hints:

- ✓ Recall that the $1 used to fund a service in OSOS is used as a tracking placeholder for services and is not reflective of actual service costs or funding streams
- ✓ All NYESS funding streams are at the "Local Office" level
- ✓ When working with actual customers, you will only be able to access the funding streams set up for your office
- ✓ If there is more than one service on a customer record, you will always want to make sure that the service you want to fund is the one currently selected before funding it
- ✓ The "Verification" pop-up window mentioned in Steps 7 & 8 will only appear if a service is being funded by a new funding stream (this will be the case for this service since no funding streams have been added yet to your customer record)
- ✓ If you are not funding a service with a new funding stream, you will only need to follow steps 1-6

Adding Additional Services & Ending Existing Services

As of **June 24, 2011**, Abbey has been successfully referred to a supported employment placement as a part-time Stock Clerk. She will now receive employment services and will no longer need Pre-Employment Services since she is currently employed. You and Abbey have decided that she would benefit most from receiving these support services, such as job coaching, at her workplace.

This means that in OSOS you will need to add an additional service type from Pre-Employment Service to Job Site Delivered Employment Support Service. Then you will also need to end the Pre-Employment Service. For the NYESS project, all supported employment placements should be tracked in the "Jobs Info" tab of the "Services" window.

To close the existing service:

1) From the "Services" tab of the "Services" window, select the Pre-employment Service
2) In the "Detail" box, fill in the "Actual End Date" field for this service (use **6/24/2011**)
3) Save the record

To add the additional service:

1) Follow the steps in **Activity 14**, only this time, add a **Job Site Delivered Employment Support Service** to Abbey's record (Use **6/24/2011** for both the "Planned Start Date" and "Actual Start Date" fields and use **9/27/2011** for the "Planned End Date" field) – don't forget to save before funding the service
2) Add funding to the service by following Steps 1-6 in **Activity 14**
3) Save the record
4) Once you have saved, a verification screen will pop up **only** if you have used a different funding streams for each service. On the verification screen, check the information for accuracy. Notice, because Abbey's employment status has changed, you should choose "Employed" in the "Employment Status" drop down field. If no verification screen pops up, you can change the "Employment Status" to "Employed" on the "General Info" tab of the "Customer Detail" window.

Activity 16

Jobs Info

1) To begin, click on the double-pointed arrows on the upper right hand corner of the "Services" window to navigate all the way to the right
2) Click on the "Jobs Info" tab
3) Select the Job Site Delivered Employment Support Service you just added to Abbey's record from the listing of services
4) Click on the "Add" button
5) Pull information from Abbey's supported employment hire letter and hints (**letter and hints below**) to fill in the fields in the "Job Details" and "Hourly Wage" boxes of this tab

Trinkets and Treasures, Inc.
44 Heart Locket Way
Niagara Falls, NY 14303
(716) 439-3948

Abbey [Your Last Name]
120 Maple Avenue
Niagara Falls, NY 14325
June 24, 2011

Dear Abbey,

We were very pleased with your interview last week and we would like to hire you as a part-time Stock Clerk. Our next orientation date for new hires is on Wednesday, June 29th, 2011 at 3pm. Please let us know in advance if you can attend on this date and time so that the accommodations you requested can be provided.

We will start you at **$9/hour** with opportunity for advancement after a six-month probationary review period. We can offer you 30 hours a week working 10am – 4pm, Monday through Friday.

Please call ahead to register for orientation. Welcome to our team!

Sincerely,

B. Wilkinson

Bettina Wilkinson
Human Resources Director

Activity 17

Activities

For the pre-employment service you added to Abbey's record, you can begin to add point-in-time activities taking place during this service period. Using these steps and the case notes on the following page, **add activities for Abbey's first two case notes**:

1) From any screen in the "Customer Detail" window, click on the "Activity" button to bring up the "Activities" webpage dialogue pop-up window
2) Click on the "NYESS" activities folder – do not add activities from any other folders
3) Enter the date of the activity in the "Activity Date" field
4) Select the appropriate activity or activities from the "NYESS" folder – multiple activities occurring on the same date can be selected at the same time
5) Click on the "OK" button
6) When you have finished entering the activities for the **first two case notes**, click "Save"

Hints:
- ✓ As a rule when working with actual customer records, try to enter activities in a timely manner as they occur after meetings or updates with your customers
- ✓ Only activities that have occurred on or before the current date can be entered – future scheduled activities cannot be entered in OSOS because they have not happened yet
- ✓ To view all activities on a customer's record, you can click on the "Activities" tab of the "Customer Detail" window
- ✓ Activities can also be viewed on the "Service History" tab of the "Services" window (along with services, enrollments and OSOS system activities)

PRE-EMPLOYMENT SERVICE CASE NOTES

4/7/2011 (Meeting) **- Met with Abbey to discuss her vocational options. Since she has some interest/talents in working with computers, we agreed that she would first have to have her reading levels evaluated. Abbey will be referred to Summit Adult Education for an update on literacy levels. She is working on a resume with her mother and will bring the draft in for review at our next meeting. [45 minutes]**

4/13/2011 (Phone Call)**: Got reports from Summit and Abbey's reading level is at a 5th grade level. While jobs with computers require higher reading levels, it is felt that vocational services should explore Abbey's interests and real talent capacity with computers. An appointment was made with Abbey to come and work with counselor to explore JobZone, a Department of Labor job seeker tool used for job searching. [15 minutes]**

Hints:
- ✓ Ideally, case notes should be entered the same day as the activity – if for any reason you cannot do so, include the date of the activity in the case note since OSOS automatically dates case notes with the current date
- ✓ Remember to not include Protected Health Info (PHI)

Comments

Refer to the excerpt below from your first meeting with Abbey to write an employment case note.

2) Click on the “Comments” button at the bottom of the screen while in any tab of the “Customer Detail” window to add a comment
3) Based on this conversation and information about Abbey in this guide, add a case note in the “Comments” section of OSOS
4) Click on the “Comments” tab to view, edit or delete a comment

You: It’s nice to finally sit down with you, Abbey. According to notes I have on file, you wanted us to meet today so we could discuss some possible career paths for you and start working together to find you a new job.

Abbey: Yes! I’m excited about a getting a new job. I miss working.

You: What kinds of jobs interest you?

Abbey: Well, I love working with computers but my mom doesn’t think my reading is good enough to find a job doing that (makes a slight face).

You: Hmm, well I see you attended school at Summit [Academy]. I’ll call in a referral to the Summit Adult Education Center to have your reading level tested. Do you think you and your mom could stop by there for testing some evening?

Abbey: Yes, I think so. My mom is usually free after 5pm.

You: I can see that you have worked at a few different jobs. Have you put together a resume yet?

Abbey: I started to work on it but I needed some help. Do you want me to bring it next time?

You: Yes, I would like to see it. Abbey, I’m noticing that you use a cane and you have disclosed that you have disabilities for which you may need accommodations. Based on what has worked for you in the past, what assistance do you think you will need at the job site?

Abbey: My cane helps but sometimes I have spasms and need a quiet, private place to go to until it’s over. I also have to take pills every six hours. Also, I’d really like to have a job coach working next to me.

You: Let’s set up a follow-up meeting for two weeks from now. In the meantime, we’ll have you test your reading level at Summit and I’ll look over your resume at our next appointment.

Activity 19

Entering Termination Info

CUSTOMER UPDATE:

Abbey has been successfully working at *Trinkets and Treasures, Inc.* for several months now. Her manager report that she is one of the most dependable, hardworking employees at the store. She has continued to receive employment supports at her job and her employer is more than happy to provide the workplace accommodations she has required. Her creative ideas and outgoing personality have helped her to make many new friends and she feels she has truly been a part of a team.

Although she has thoroughly enjoyed working there, Abbey will be moving with her family out of state since her mom's fiancé Pete was promoted to a position in California. Her work team will be sad to see her go, but they understand Abbey relies on the supports her family provides. Since Abbey will no longer be working at this job, the "Termination Reason" information on the "Jobs Info" tab will need to be completed and her Job Site Delivered Employment Support Service will need to be closed:

To update the information on the "Jobs Info" tab:

1) Click on the "Jobs Info" tab in the "Services" window
2) Be sure to select the Job Site Delivered Employment Support Service under "Service" and then highlight the corresponding Jobs Info ID under "Jobs Info" to activate the data entry fields
3) Enter today's date in the "Termination Date" field
4) Click on the "Reason" button to bring up the Termination Reason hierarchy – scroll through and select the most appropriate reason, then click on the "OK" button
5) Click the "Save" button to finish updating the information.

Hints:
- ✓ If for any reason the termination reason for your customer is not listed in the "Termination Reason" hierarchy, you have the option to type a reason in the "Other" free-form text field – only use this field if there is not an existing reason already listed in the hierarchy

Activity 20

Closing the Employment Service

5) From the "Services" tab of the "Services" window, select the Job Site Delivered Employment Support Service
6) In the "Detail" box, fill in the "Actual End Date" field for this service (use today's date)
7) Save the record