Case Study 2

***** 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 Office/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.

Activity 3

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 below to complete as many of the fields as possible (Enter the customer’s first name as Andrew 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 Andrew provided his primary phone number, enter the phone number. Since he 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 have been provided for you 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], Andrew **Date of Birth:** 04/21/1979

Address: 321 South St. **City:** Astoria **NY** **Zip Code:** 11106

Phone Number: 718-345-9876

Education Level & Status? IEP Diploma, not attending school

Employment Status? Not employed

CONTACT INFO:
Andrew prefers to be contacted by email at andrew42179@hotmail.com. While he can receive text messages, all messages need to be spelled out-one sentence per text as written English is not his first language (ASL is his native language).

DISCLOSURE:
Andrew is a thirty-five year old African American Male. Andrew is deaf. Andrew will require ASL translators and other employment-related accommodations. Andrew is willing to disclose this. Andrew will also disclose his gender but prefers not to disclose his race or ethnic heritage in OSOS.

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:

Any workplace accommodations Andrew will need should be noted in the "Comments" section **later**. Remember to mention only the necessary accommodations (e.g. Will need ASL translators at the job site) without reference to his specific disability or any Protected Health Information (PHI).

Andrew is **not** a Veteran or a Migrant/Seasonal Worker.
Selective Service: Yes **Registration #** 999999999

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 (Andrew is only disclosing some of this information).

Activity 5 Creating a New Record- Programs/PA

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

DISCLOSURES:

☒	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 the 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:
Andrew confirms that he receives SSI, Medicaid, and Food Stamps. Medicaid ID Number is #ML72057P.

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 Andrew’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:
Andrew is **not yet sure of his employment objective**. He dreams of someday owning his own business but is not sure he currently has the skill set to do so. He has many years of **food preparation experience** and may be interested in doing something along these lines and advancing his skills in this field.

JOB LOCATIONS:
Andrew does not drive and does not have a driver’s license. Andrew does the ride the bus and has been travel trained. If a new job were located, training would be necessary again. He is willing to travel up to **10 miles from his home zip code of 11106 to work.**

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

Activity 8

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
- ✓ Complete “Job Type” even though it is not a green dot 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

Andrew’s Work History

Job Title: Prep Cook
Employer: Friendly Pizza Restaurant
Location: 2112 36th Ave, Astoria, NY 11106
Dates: 11/2010-08/2011
Duties: Sorting and washing produce, cleaning and stocking the prep area, cleaning and dishwashing
Wage: $10/hr
Hours worked per week: 10
Reason for Leaving: Downsized

Job Title: Dishwasher
Employer: Astoria Diner
Location: 1221 Astoria Blvd, Astoria, NY 11102
Dates: 06/2009-10-/2010
Duties: Loading the dishwasher, re-stocking clean plates, garbage maintenance, cleaning
Hours per week: 15
Reason for Leaving: Andrew had issues dealing with several of his co-workers and his supervisor

Job Title: Busboy
Employer: Wendy’s
Location: 3091 Steinway St., Astoria, NY 11103
Dates: 02/2008-06/2009
Duties: Bussing and cleaning empty tables, sweeping the dining room, taking out trash
Wage: $7.25
Hours per week: 10
Reason for Leaving: Store closed since it was not generating profit

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:

Andrew tests at an IQ of 66, has low literacy levels and is unable to communicate via writing. Andrew graduated from his local High School P.S. 20, with an **IEP diploma in June 2000**.

DRIVER LICENSE:

Andrew **does not** have his driver’s license but will take the city bus with proper training.

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:

Andrew has experience in the **food industry**. He has experience cleaning and sanitizing a prep station, preparing a variety of foods, light cooking and storing food safely according to food industry standards.

Since he is deaf, Andrew tends to get frustrated that he can’t communicate with his co-workers. In the past, job coaches have conducted American Sign Language (ASL) and Deaf Awareness classes for his co-workers and supervisors on his job sites so they were able to communicate in very simple sentences and have a greater understanding of deaf culture.

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

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 Andrew's case, this date is **04/07/2011,** 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 Andrew and his family, the consensus is that while Andrew is at the point where he would like to start looking for work, some pre-employment services will be necessary before he can do so (e.g., assessments, resume review, career exploration, etc.). You have determined to add a Pre-employment Service to Andrew'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 **04/07/2011** in the "Plan. Start Date" and "Actual Start Date" fields and type in **07/07/2011** 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**, Andrew has been successfully referred to a supported employment placement as a Food Prep Clerk. He will now receive employment services and will no longer need pre-employment services since he is currently employed. You and Andrew have decided that he would benefit most from receiving these support services, such as job coaching, at his 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

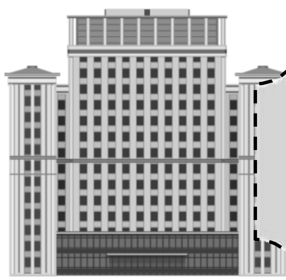
To add the additional service:

1) Follow the steps in **Activity 14**, only this time, add a **Job Site Delivered Employment Support Service** to Andrew's record (Use **06/24/2011** for both the "Planned Start Date" and "Actual Start Date" fields and use **09/27/2011** 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 Andrew'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 Andrew's record from the listing of services
4) Click on the "Add" button
5) Pull information from Andrew'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



Pierre Hotel & Conference Center
22 94th Street
East Elmherst, NY 11369

Andrew [Your Last Name] 321
South Street
Astoria, NY 11106
June 24, 2011

Dear Andrew,

We were very pleased with your interview last week and we would like to hire you as a full-time Food Preparation Assistant. Your orientation date has been scheduled for 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 **$10/hour** with opportunity for advancement after a six-month probationary review period. We are offering you 40 hours a week working 6am – 2pm, Monday through Friday.

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

Sincerely,

Tina Chandre

Human Resource Director, Pierre Hotel & Conference Center

Activities

For the pre-employment service you added to Andrew'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 Andrew'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)

<u>PRE-EMPLOYMENT SERVICE CASE NOTES</u>

***4/7/2011 (Meeting)* - Met with Andrew, his job coach and interpreter to discuss the status of his job search. Andrew discussed through his interpreter how frustrated he was to lose his last job and still demonstrates issues that could be described by cognitive disabilities. We all agree that a psychological screening is needed to confirm what services may be needed to support Andrew. A referral to a clinic will be made. In addition, a call will be made to his Mental Health (MH) therapist to discuss plans being developed to re-evaluate all of Andrew's needs as we work together to find him a new job. [45 minutes]**

***4/13/2011 (Update)* - Andrew was referred to Queens Independent Living Center to meet with a Benefits Advisor. Now that he's not working, it is important to know whether he will receive his full SSI payment of $697 or a lesser amount. His Medicaid was never discontinued but it is necessary to stay on top of it and remind him to bring in his re- certification notices on time to avoid disruption in Medicaid. [15 minutes]**

Activity 18

Comments

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

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

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)

You: Andrew, I'm glad to finally meet with you and your ACCES-VR coach today. If I remember from our call, you wanted us to meet today so we could provide assistance with your job search efforts.

Andrew *(through his interpreter)*: Yes, I was so frustrated to lose my last job. I am sick and tired of doing this and just need help!

You: I am sensing that your frustration is overwhelming you and feel that you could benefit from some additional services to help you work through your frustrations and anger.

Andrew's job coach: We all agree that is a good step forward for Andrew.

You:*(Writing note: A referral to a clinic for psychological screening needs to be made and also need to call Andrew's mental health therapist about the plans being developed to re-evaluate his needs in working together to find him a new job.)* I will get that started today. What are some of your work goals?

Andrew: I have a lot of experience doing prep work in kitchens but I would like to do something more creative, maybe work for myself someday.

You: Okay, we should keep that in mind for our next meeting when we begin to develop your employment plan. [Andrew is noticeably fidgety and he avoids eye contact] Is there anything else that is bothering you about working again, Andrew?

Andrew: I'm worried about how working again will affect my [SSI] benefits.

You: Hmm, well I also noticed that your Medicaid re-certification has not been filed and you will want to meet with a benefits counselor to make sure it gets updated so you don't lose those benefits – If you'd like, I can write you a referral to a Benefits Advisor to work on your Medicaid and talk about how working will affect your SSI payment. *(Fills out referral form)* Okay, here's the referral you can bring in to the Independent Living Center. Make sure to stop by before our next appointment and don't forget to check in with John (Andrew's mental health therapist) tomorrow.

Activity 19

Entering Termination Info

<u>CUSTOMER UPDATE:</u>

Andrew has been successfully working at *Pierre Hotel and Conference Center,* for several months now. His manager has reported that he has had only a couple of minor incidents with his frustrations and challenges. He indicated that he has been doing well otherwise and that Andrew has been successful in completing his job duties as a Food Preparation Assistant. He seems to really love his job and has learned a great deal about the food industry. Although Andrew was doing well at his job, he decided to leave in order to take culinary classes to pursue his own business in the food industry. While working at the hotel, Andrew met Elisa, a co-worker fluent in ASL, who has always dreamed of owning a business in the hospitality industry. Elisa and Andrew have really connected and have applied for a small business loan to rent kitchen space in Astoria to set up a light catering business. Andrew's last day was yesterday at the Pierre Hotel.

Since Andrew 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:

<u>To update the information on the "Jobs Info" tab:</u>

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

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