



# **REOS Initial Scheduling Re-Employment Eligibility & Assessment (REA)**

**July 12, 2010**

**Presented by: Vicki Mockler**



## REA Scheduling Criteria

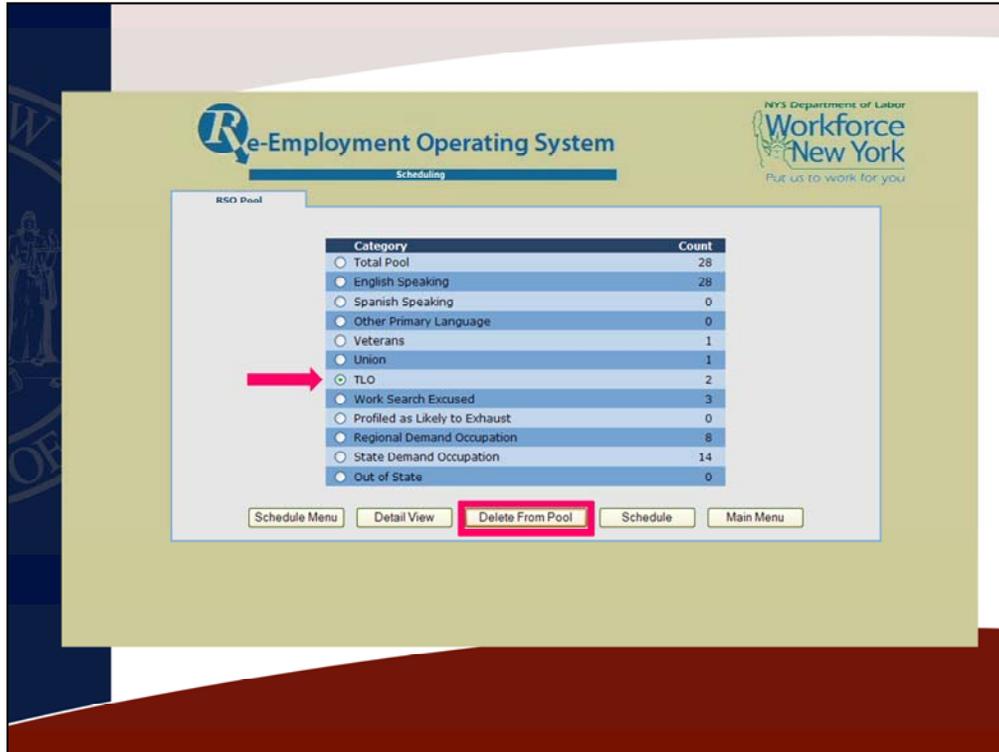
- 60% of Customers Profiled 1 to 50 (Excluding TLO, Union and Seasonal)
- Customers Selected as REA Participants should be scheduled with the *REA Grant Only: Initial REA Interview Appointment Purpose*
  - Customer Record is Updated to show as REA Enrolled
  - Overnight REA Enrollment Activity is entered into OSOS

## REA Scheduling Criteria

## Webinar Overview

- Remove Union and TLO Customers from the Pool
- Identify Seasonal Customers and Remove them from the Pool
- Schedule Non REA Candidates from the Pool (Profiled 0 or 50+)
- Randomly Select and Schedule 60 Percent of Remaining Customers to be REA Participants
- Schedule Remaining Customers Based on Current Policy
- Generate Letters Only for Union and TLO Customers that were Removed from Pool

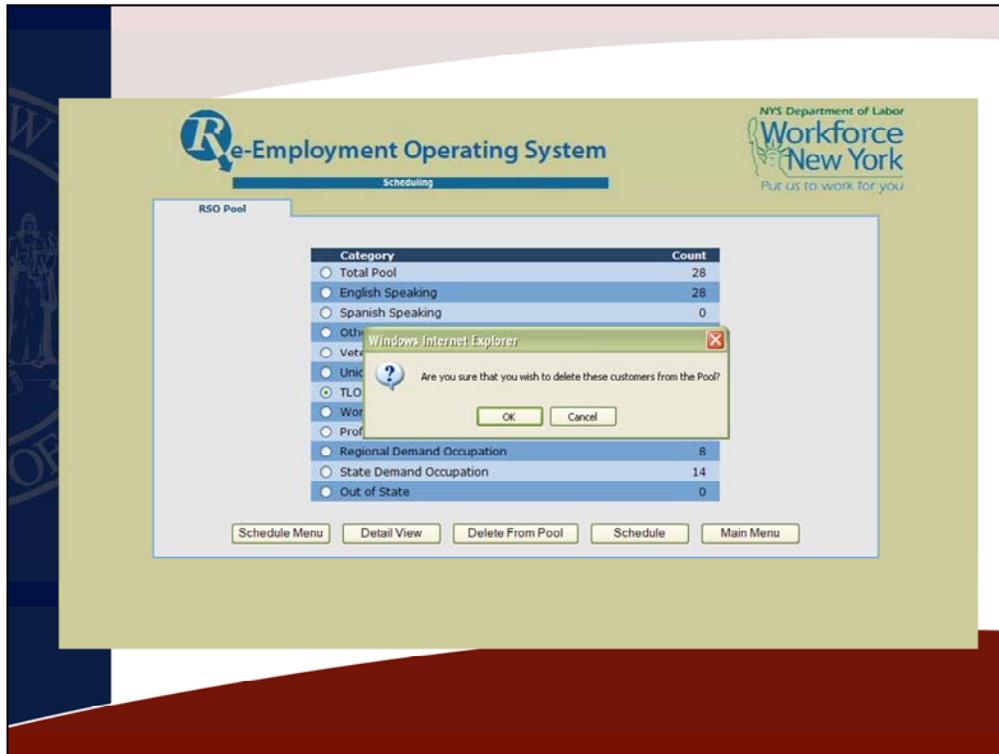
**Simplified Overview of the process we will be covering during this webinar.**



## Remove Union and TLO Customers from the Pool

Example Above:

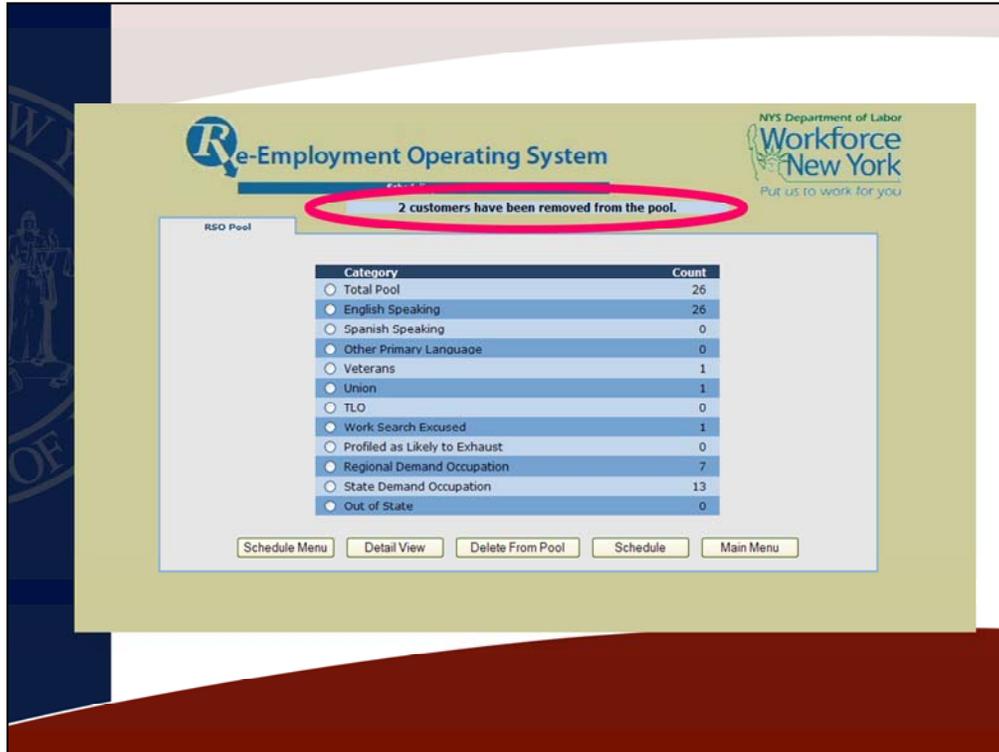
Select TLO Category and click on the Delete From Pool button.



## Remove Union and TLO Customers from the Pool Continued...

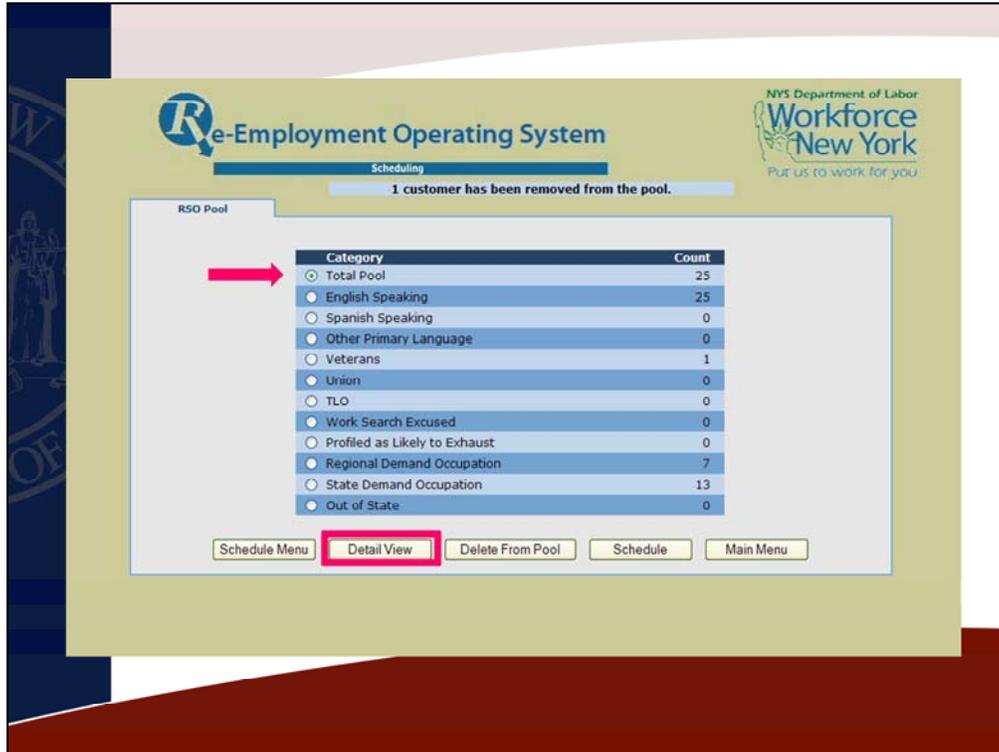
System requires you to confirm that you would like to remove the customers from the Pool.

Click on the OK button to continue.



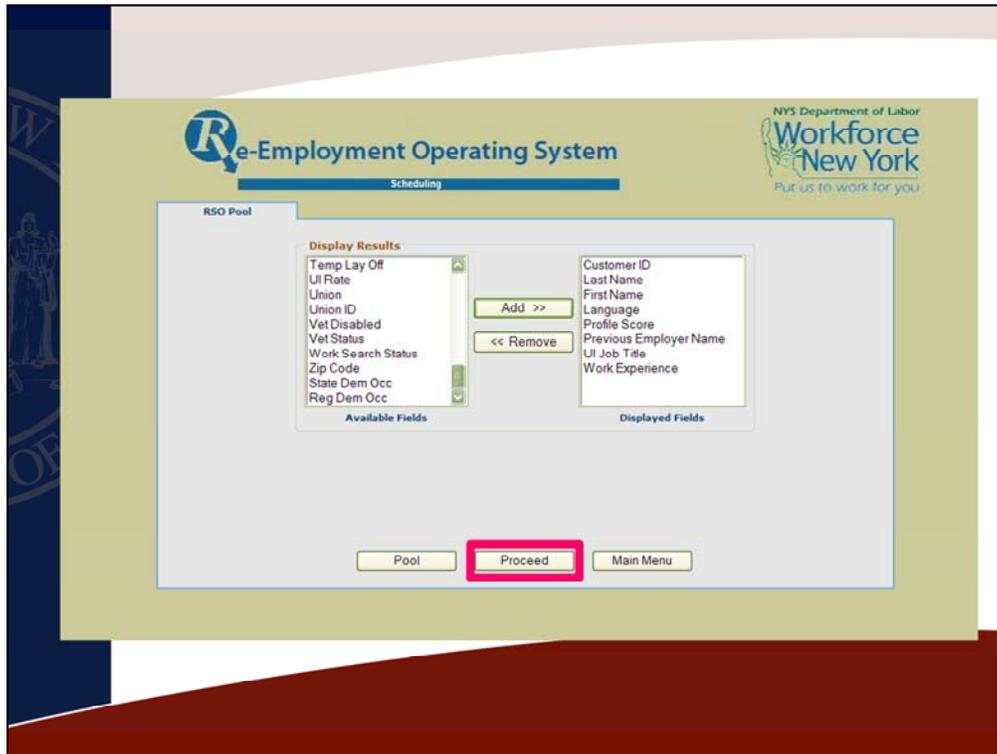
**Click on Total Pool then Click Detail View Button  
System displays confirmation that the customers  
selected have been removed from the Pool.**

**You would now need to repeat this process to remove  
the Union Customer.**



## Identify Seasonal Customers and Remove them Pool

Once you have successfully removed the Union and TLO customers from the pool select the Total Pool option then click on the Detail View button.



**Identify Seasonal Customers and Remove them Pool Continued...**

**Add Language, Profile Score, Previous Employer Name, UI Job Title and Work Experience to the Displayed Fields by clicking on the field name in the Available Fields list then click the Add button.**

**Offices that schedule customers to report to other locations may need to display additional fields such as County and/or Zip Code.**

**Click on Proceed.**



**With Supervisor/Managers guidance Seasonal Customers should be identified based on local Labor Market information. Those customers should then be marked as TLO and an estimated RTW date should be entered.**

**Example: Bus Drivers, Landscapers, etc. with 24 months experience with same employer.**

**The TLO and RTW date information may be entered using the Group Update button or from each individual customer detail Record. These customers should then be removed from the Pool.**

**Customers should then be sorted by language and profile score.**

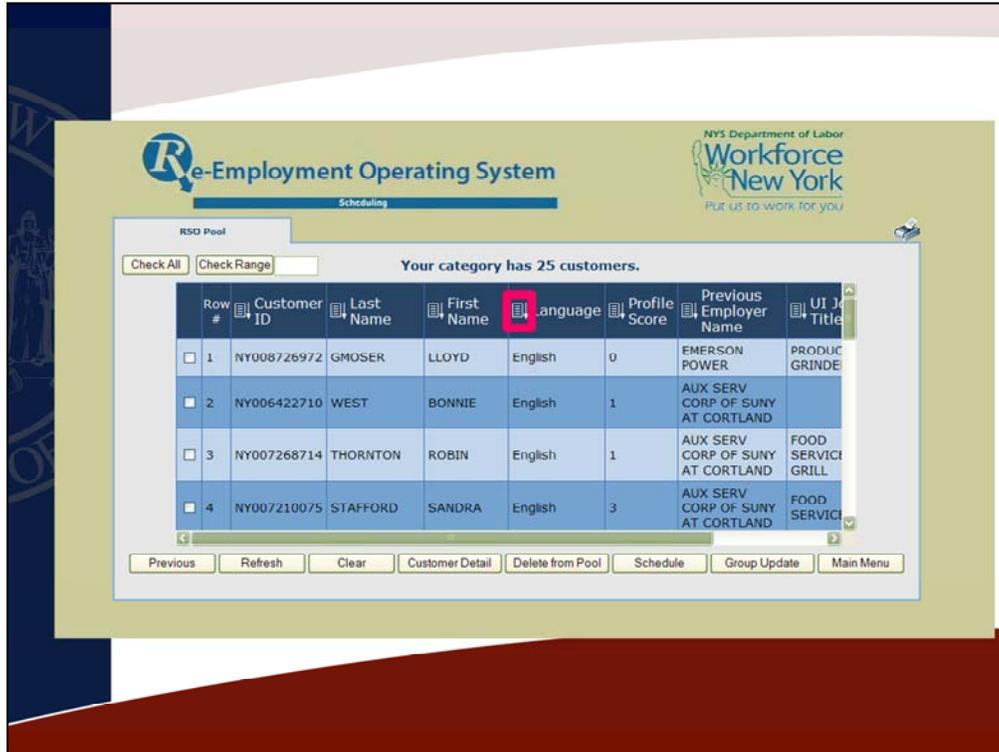
The screenshot shows the 'Re-Employment Operating System' interface. At the top left is the logo 'Re-Employment Operating System' and at the top right is the 'NYS Department of Labor Workforce New York' logo with the tagline 'Put us to work for you'. The main content area is titled 'Group Update' and 'General Customer Info'. It contains several form fields: 'Primary Lang.' with a dropdown arrow, 'Reporting Office:' with a dropdown arrow, 'Union(PD): Yes  No  No

**Identify Seasonal Customers and Remove them Pool Continued...**

**Staff should now select the TLO Yes option then enter a Return to Work (RTW) Date.**

**By clicking on the Save button each customer you have selected will now be marked as TLO with the RTW date you entered.**

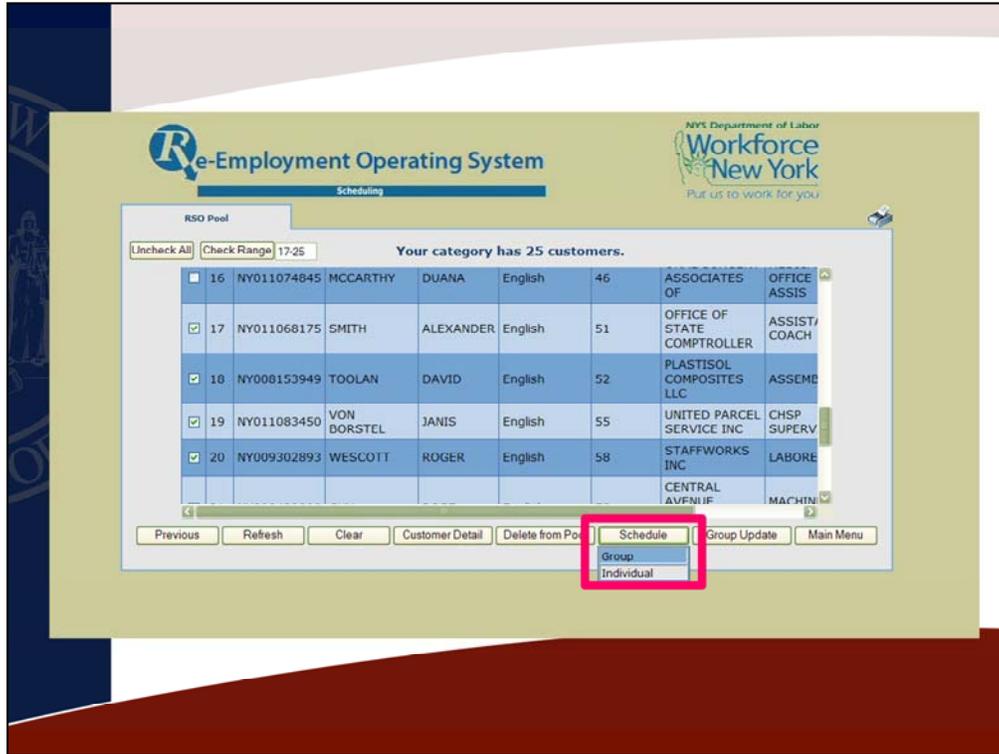
**Staff will be returned to the Search Results screen.**



## Identify Seasonal Customers and Remove them Pool Continued...

If you identified and marked customers as TLO you will now need to select them from this screen and click on the Delete From Pool button to remove them from the Scheduling Pool.

Customers should then be sorted by language and profile score.



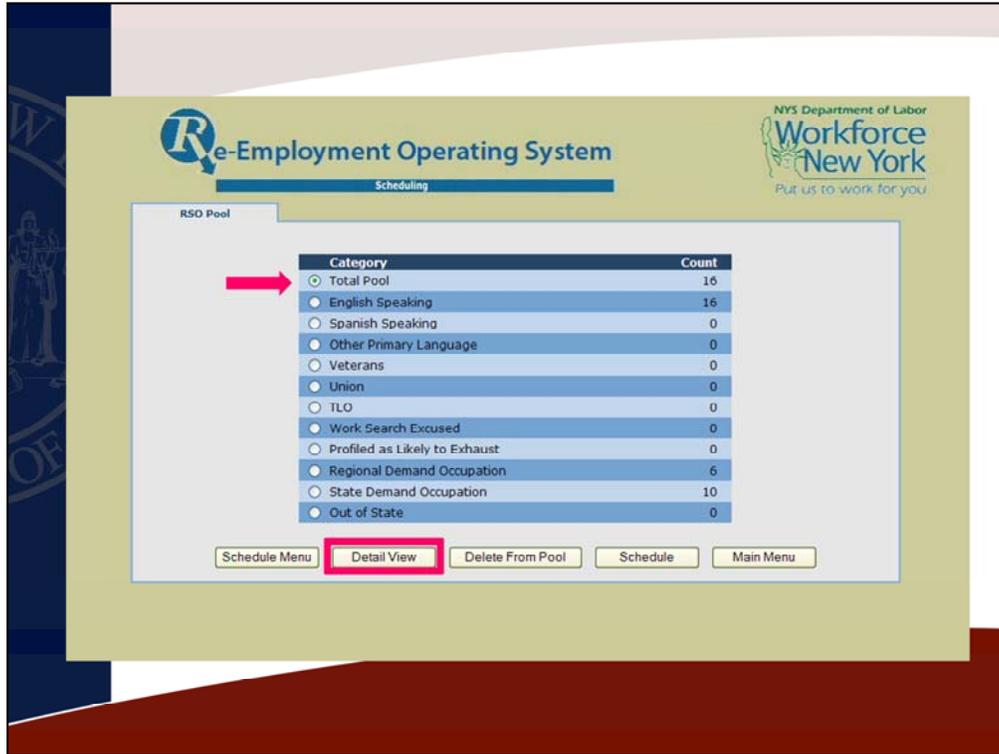
## Schedule Non REA Candidates from the Pool

All non REA Candidates (Profiled 0 or 50+) should be selected.

You can choose to select the range of customers using the Check Range Feature by entering the beginning row number and the ending row number separated by a hyphen, then click on the Check Range button.

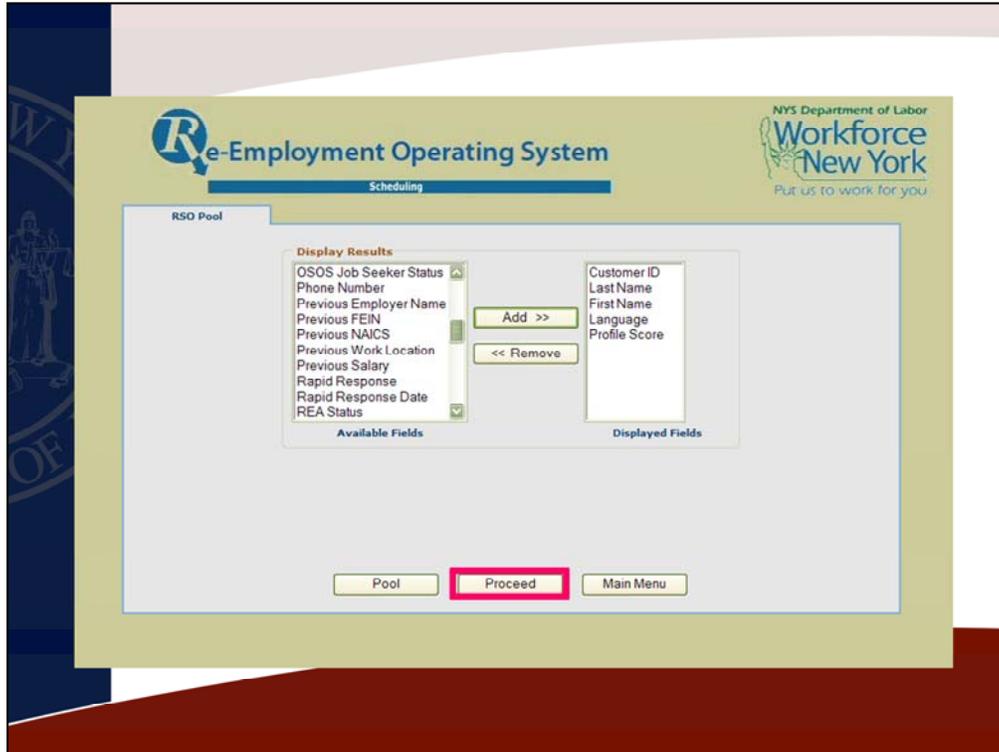
Once you have customers selected click on the Schedule button.

Schedule process will proceed as normal.



**Randomly Select and Schedule 60 Percent of Remaining Customers to be REA Participants**

**Navigate back to the Weekly Scheduling Pool, select the Total Pool category and click on the Detail View button.**



**Randomly Select and Schedule 60 Percent of Remaining Customers to be REA Participants Continued...**

**Add Language and Profile Score to the list of displayed fields.**

**Click on the Proceed button to continue.**



## Randomly Select and Schedule 60 Percent of Remaining Customers to be REA Participants Continued...

At this point only possible REA candidates are left in the pool. Your goal is to schedule 60% of these customers. To get to your goal of 60% you can multiply the total number of REA candidates in your list by 60%.

Random Selection:

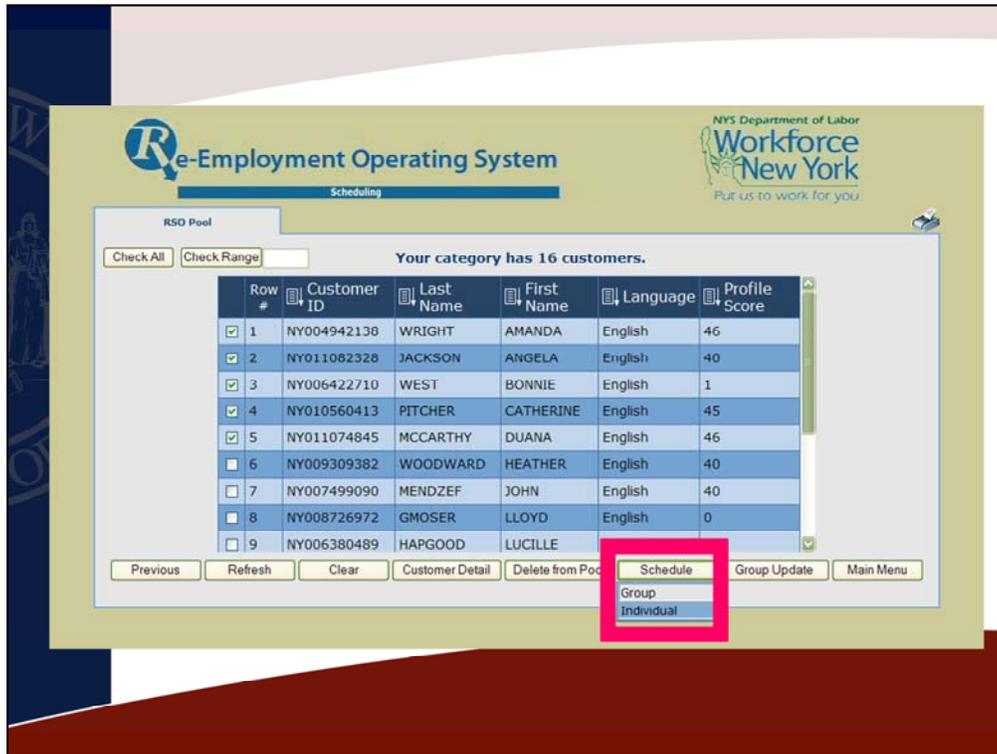
Staff should not sort by Profile Score, Language, Vet Status or other criteria that would limit the candidates to a set of characteristics.

Our recommendation is to change how you sort and select the customers each week.

Example sort by first name, last name or customer id.

Select from the top one week and the bottom the next.

Offices that have a small number of customers may choose to select every other customer until they have selected the percentage necessary.



**Randomly Select and Schedule 60 Percent of Remaining Customers to be REA Participants Continued...**

For this example, we will need to select 10 candidates to be REA participants.

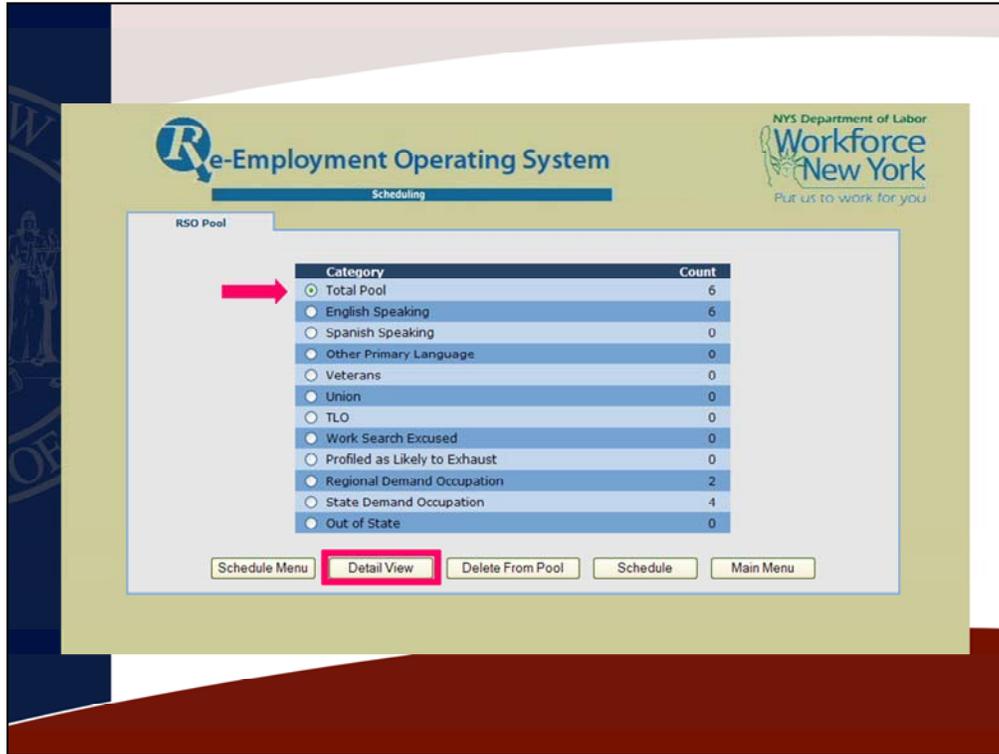
In this example I have sorted the customers by First Name and select 5 individuals from the top and 5 individuals from the bottom to make up the 60% (10 customers) of my potential pool of 16.

Once you have selected your customers click on the Schedule button at the bottom of your screen.

Policy decision of how to schedule the REA participants is need to complete the scheduling.

Managers/Supervisors will need to determine if Group or Individual scheduling is used.

They may decide to bring REA participants in as a group initially to discuss common features of the initial interview (SMART, General UI Compliance), then following the group complete the one-on-one interviews.



### Schedule Remaining Customers Based on Current Policy

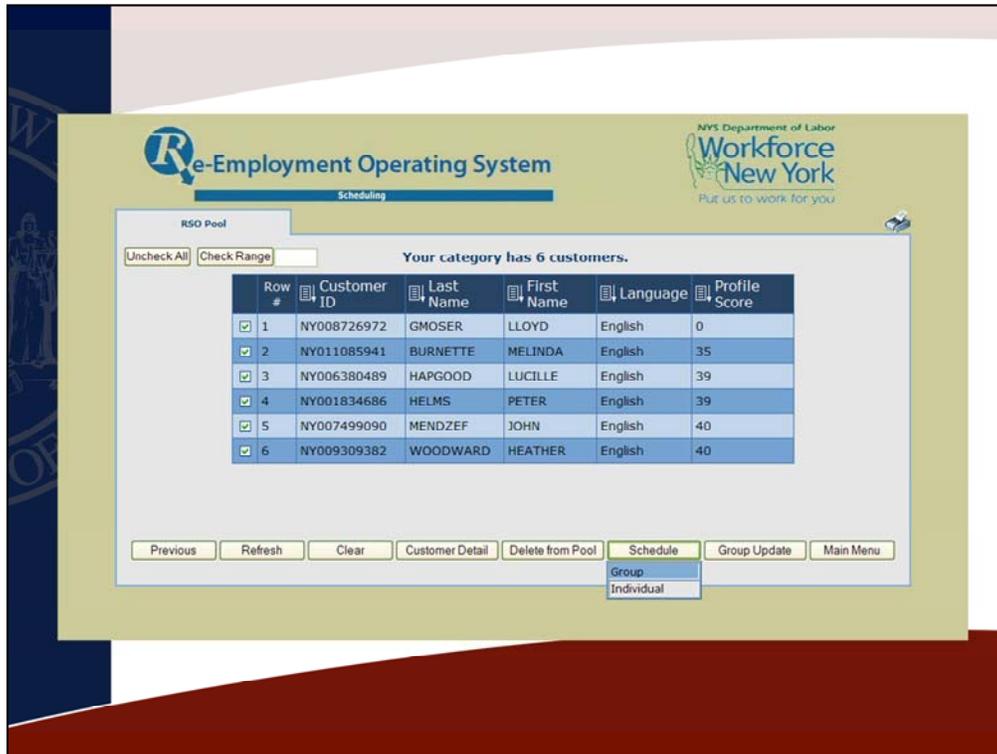
Now we need to schedule the remaining customer (REA Control Group) by selecting the Total Pool category and clicking on the Detail View button.



**Schedule Remaining Customers Based on Current Policy Continued...**

**Add Language and Profile Score to the displayed fields list.**

**Click on the Proceed button.**



## Schedule Remaining Customers Based on Current Policy Continued...

Your results should be sorted by Language then Profile Score by clicking on the column headings.

The remaining customers should be scheduled according to the scheduling policy in place for all UI Customers.

Customers with Profile Scores of 0 or greater than 30, must be scheduled for a one-on-one Initial Assessment. They may be seen initially in a group setting as long as afterwards (on the same day) they receive a one-on-one assessment.

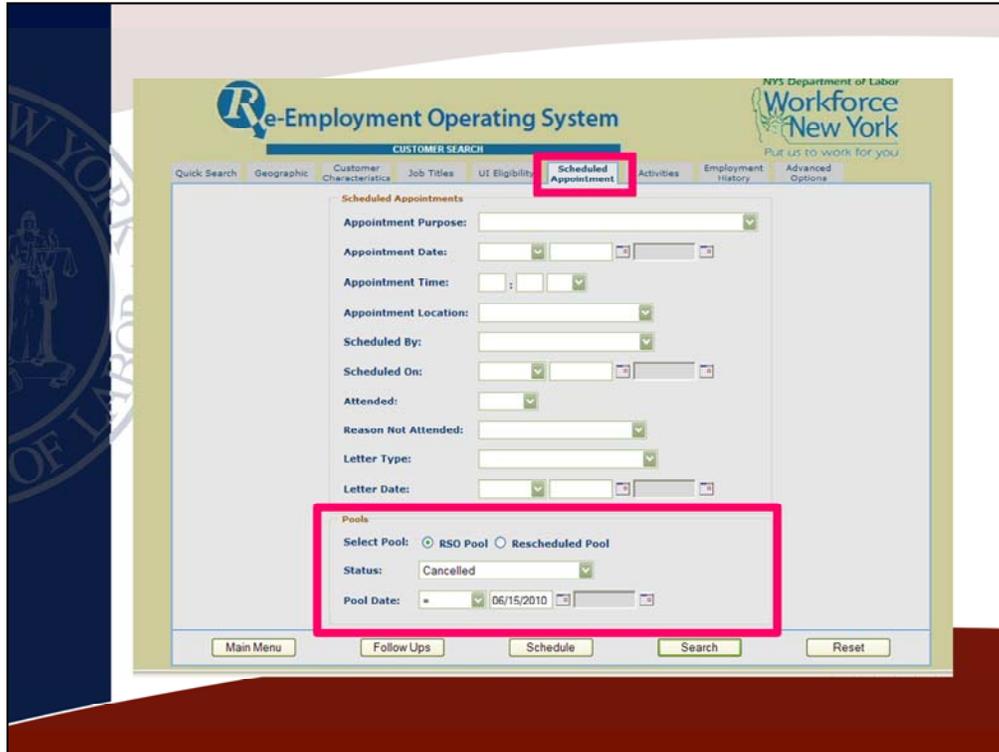
Customers with profile scores between 1 and 30 may



**Generate Letters Only for Union and TLO Customers that were Removed from Pool**

**Now we will search for the customers that were Deleted from the Pool (Union/TLO).**

**From the Quick Search tab select ALL CUSTOMERS from the REOS Record Status dropdown.**



**Generate Letters Only for Union and TLO Customers that were Removed from Pool Continued...**

**From the Scheduled Appointment tab select the RSO Pool option from the Pools section. Select Cancelled (Deleted from Pool) from the Status dropdown. Select the equal sign (=) from the Pool Date Dropdown and enter the Pool Date (REOS Create Date) in the space provided.**

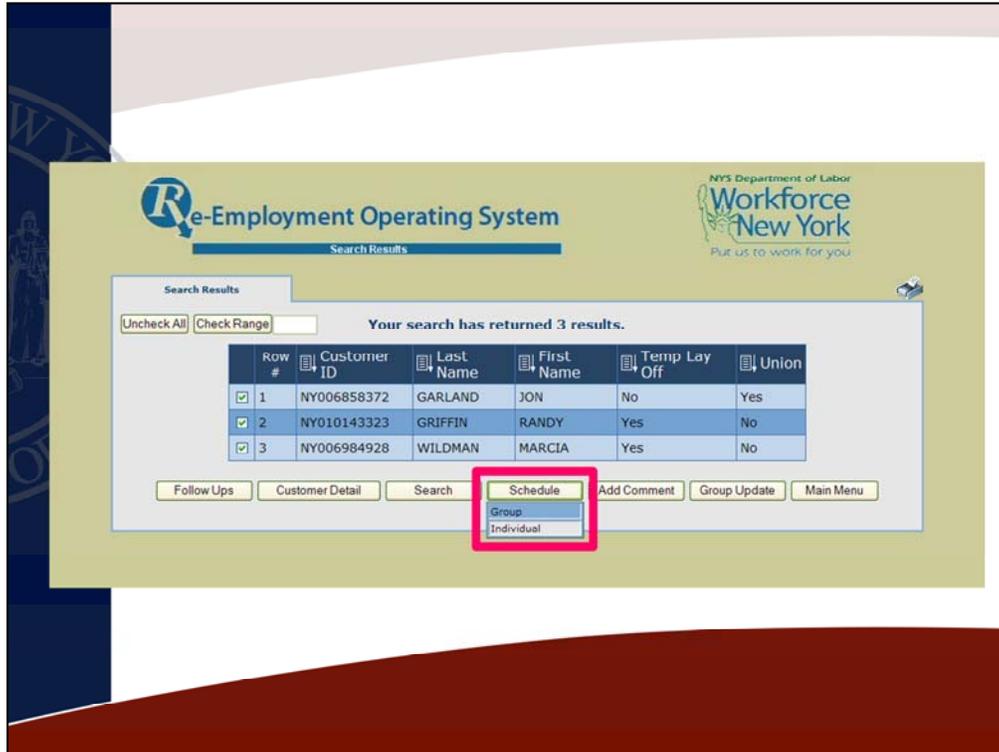


**Generate Letters Only for Union and TLO Customers that were Removed from Pool Continued...**

## **Advanced Options Tab**

**At this point you may add additional information such as Language, Temp Lay Off and Union to the displayed fields.**

**Click on the Search button.**



**Generate Letters Only for Union and TLO Customers that were Removed from Pool Continued...**

**The number of customers returned in your search results should equal the number of Union/TLO customers that you removed from the scheduling pool in earlier steps.**

**Select the appropriate customers and click on the Schedule button and choose the Group option listed.**

Group Scheduling

Total # of Customers In Group

Select One Group Function

Schedule Appointments with Appointment Letter

Generate Letters Only (no appointment scheduled)

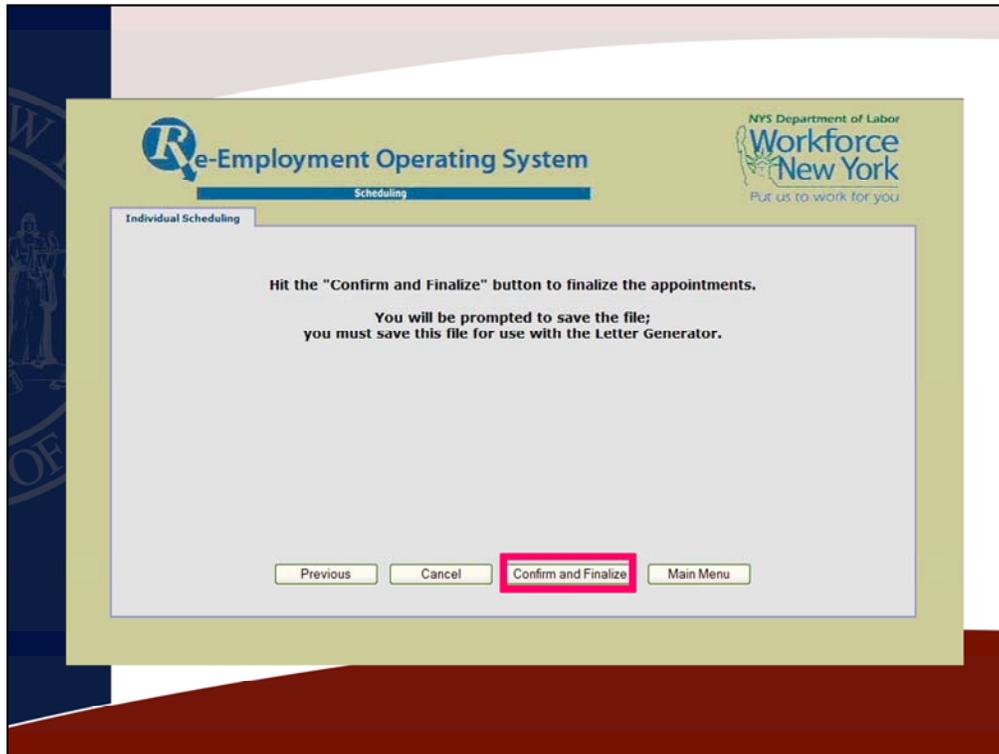
Letter Type:

**Generate Letters Only for Union and TLO Customers that were Removed from Pool Continued...**

**The will automatically select the Schedule Appointments with Appointment Letter. However, you should choose the Generate Letters Only (no appointment scheduled) option.**

**This will refresh the screen so the only option listed will be Letter Type. You should now select the appropriate letter type from the list provided. For this example we will choose the TLO/Union/Seasonal letter.**

**Click on the Proceed button to continue.**



**Generate Letters Only for Union and TLO Customers that were Removed from Pool Continued...**

**Click on the Confirm and Finalize to complete your scheduling.**



- REOS questions / problems?
  - Email: [Help.Reos@labor.ny.gov](mailto:Help.Reos@labor.ny.gov)
- NYOSOS data entry questions / site access problems?
  - Email: [Help.OSOS@labor.ny.gov](mailto:Help.OSOS@labor.ny.gov)
  - OSOS help phone (518) 457-6586





*Thank-you!*

  
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