Re-Employment Operating System (REOS) Overview Webinar

- July 1, 2010 & July 8, 2010
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REOS Background

- Developed Internally by DEWS and Planning & Technology
- Consists of Unemployment Insurance Customers Only
- Receives Updates/Information from the OSOS and Unemployment Insurance Systems
- Download every Friday – used for scheduling

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REOS Additional Information

- **REOS Username/Password Information is shared with OSOS**
- **Must sign into OSOS at least every 180 Days to keep your account active**
- **Changes in OSOS take overnight to appear in REOS**

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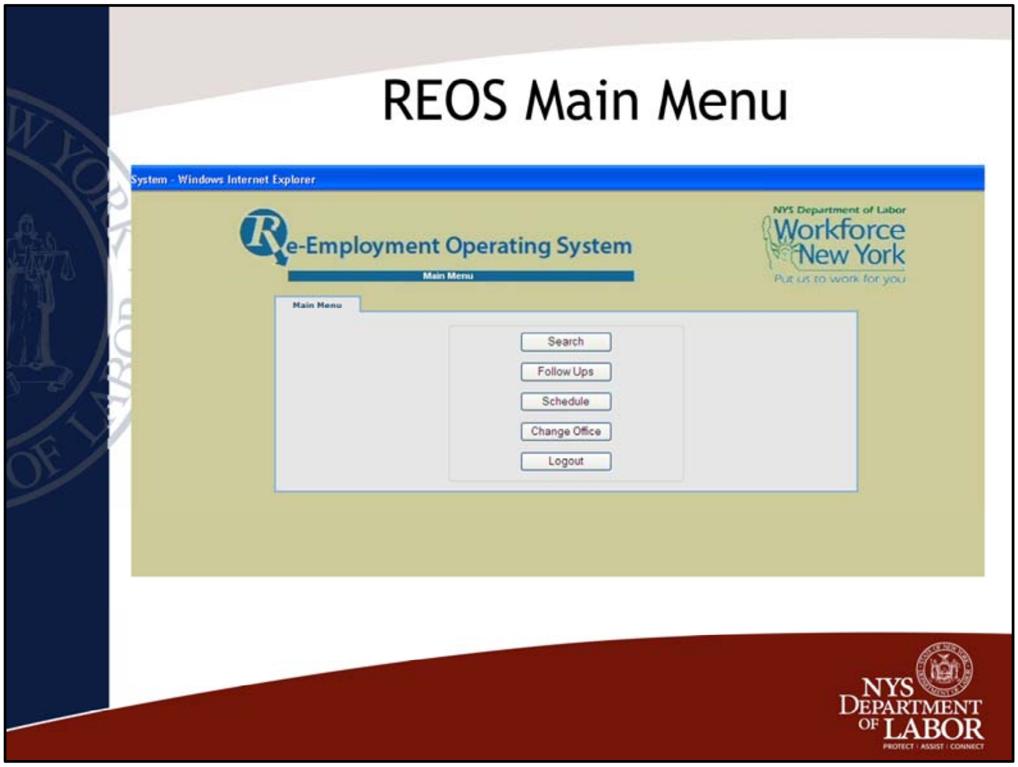
Website Address for accessing REOS is https://reos.labor.state.ny.us

Username and Password are case sensitive.

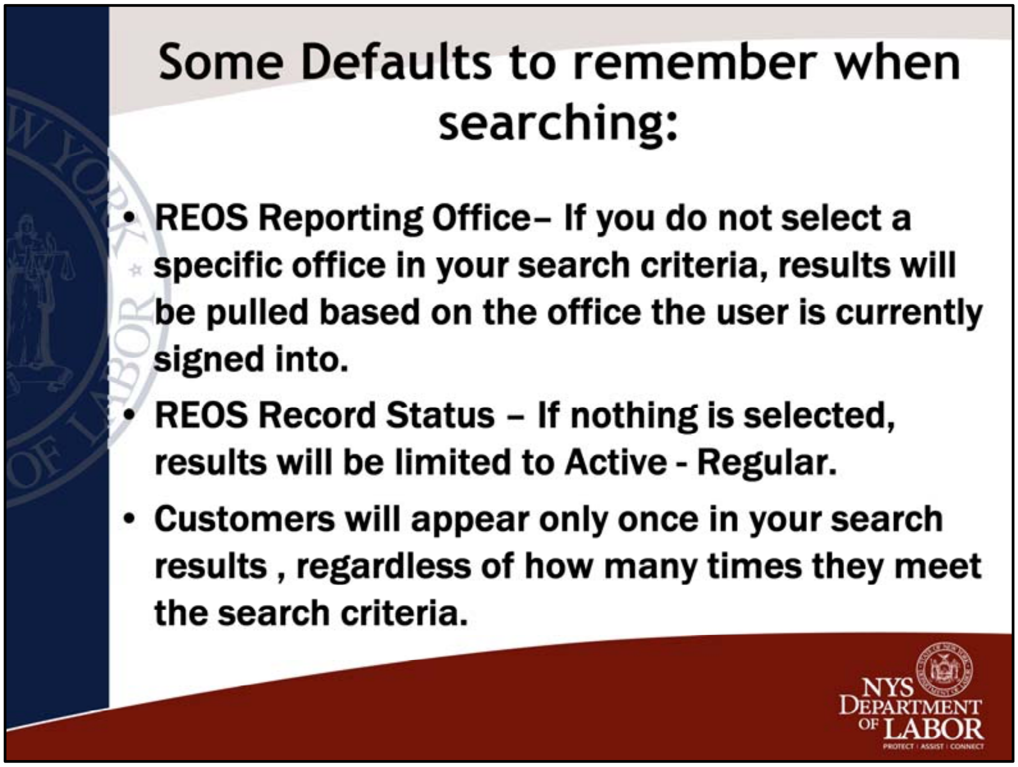
You cannot change your password from the REOS system, you will need to change it in OSOS. Once changed in OSOS it will take overnight before the password change takes effect in REOS.



REOS automatically signs you into your OSOS primary office.

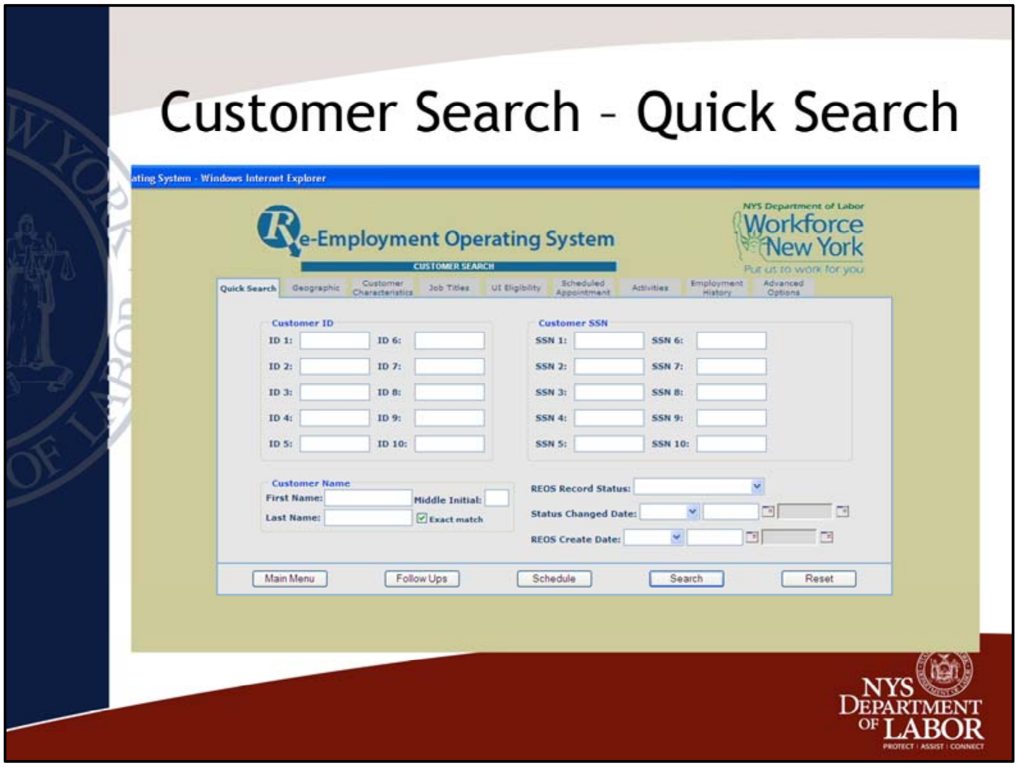
If you have access to multiple office you can change offices by clicking the Change Office button, select the appropriate office from the list and click the Change Office button at the bottom of the screen.

We will begin with the how to search for customers in REOS. To access the search features of REOS click the Search button on the Main Menu.



REOS Reporting Office: This default is important if you have access to multiple offices.

REOS Record Status: This default is extremely important to keep in mind when searching. Example: If you did not specify a REOS Record Status value in your search criteria when searching for customers that were scheduled two weeks ago, customers no longer certifying for UI would not be returned in your search results. When searching for past appointments you should choose ALL CUSTOMERS from the REOS Record Status dropdown box, which will return all customers regardless of their current REOS status.



REOS Search, similar to OSOS, consists of multiple tabs.

Quick Search Tab

This tab allows you a quick way to look up customers by Customer Id (OSOS ID), SSN or Name. When searching by any of these three fields your results are not limited to active customers only.

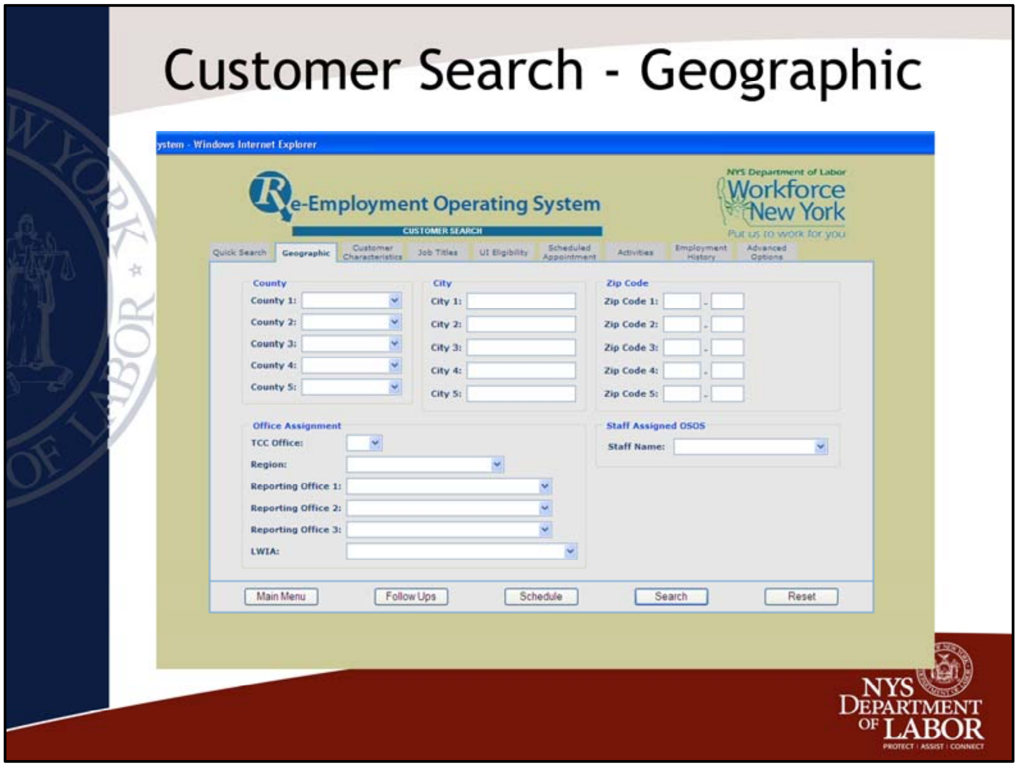
You cannot search for customers using both Customer Id’s and SSN in the same search.

When searching by name you should always uncheck the Exact Match box unless you know the exact spelling of the customers name. If searching by name you must enter a last name, you cannot search by first name only.

REOS Record Status: This is where you can choose to override the Search Default of Active – Regular

Status Changed Date: This can be used to identify customers that have recently changed REOS Statuses. In order to use this feature you must select a value from the REOS Record Status box.

REOS Create Date: This date is the date the customer was initially “downloaded” into the REOS system as a new UI customer that should be scheduled/contacted.



Geographic Tab

County, City and Zip Code: These fields are available to narrow your search results to a particular set of counties, cities and/or zip codes.

Office Assignment

This is where you can override the REOS Reporting Office Search Default by selecting a Region, LWIA or Office(s).

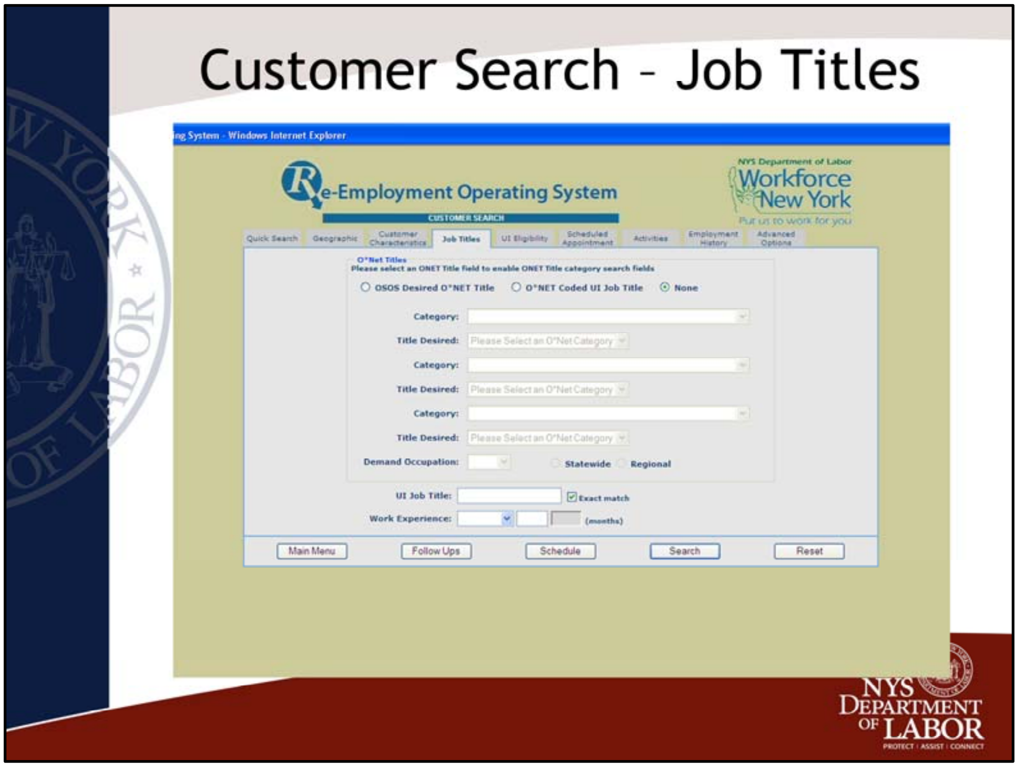
Staff Assigned OSOS

You can search by Staff Assigned in OSOS, which is the last staff person to enter a service or activity for the customer.

Customer Characteristics Tab

This tab can be used to search for customers with similar characteristics.

Some of the commonly used options on this tab are Work Search Required Status, Veteran Status and Profile Score.



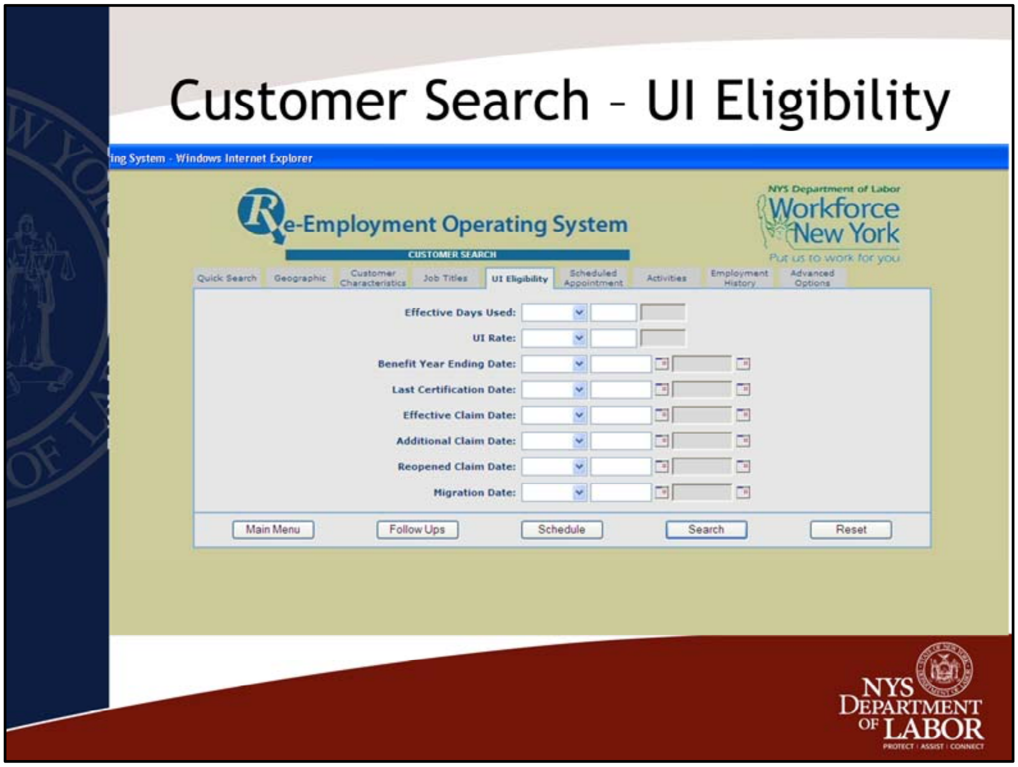
Job Titles Tab

This tab allows you to search for customers based on their OSOS Desired O'NET Title (type of work they are currently looking for) or their O'NET Coded UI Job Title (title determined based on their most recent job title at the time they filed for UI). System automatically defaults to None. Simply click the button next to the type of title (Desired or UI Job) and then the Category, Title Desired and Demand Occupation options become active.

Once you select a category the Title Desired list is specific to the category you selected. You can search for up to three category/title combinations. You can also choose to search for only Statewide or Regional demand occupations.

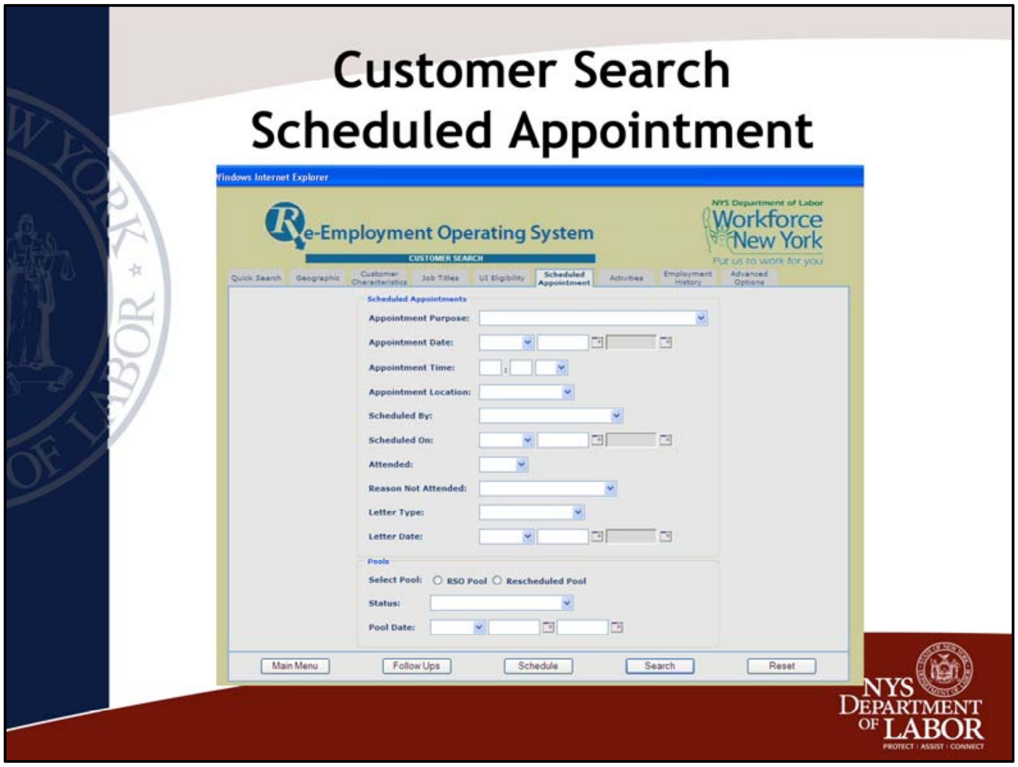
UI Job Title is the title the customer specified at the time they filed for UI. You should always uncheck the Exact Match box to allow for spelling errors and/or abbreviations.

Work Experience can be used to limit your results to customers that have a range of experience in the job title.



UI Eligibility Tab

This tab allows you to limit your search to customers that meet criteria related to their UI Claim.



Scheduled Appointment Tab

This tab allows you to search for customers that were scheduled for an appointment, whether they attended the appointment, reason for not attending as well as the letter type that was sent to the customer.

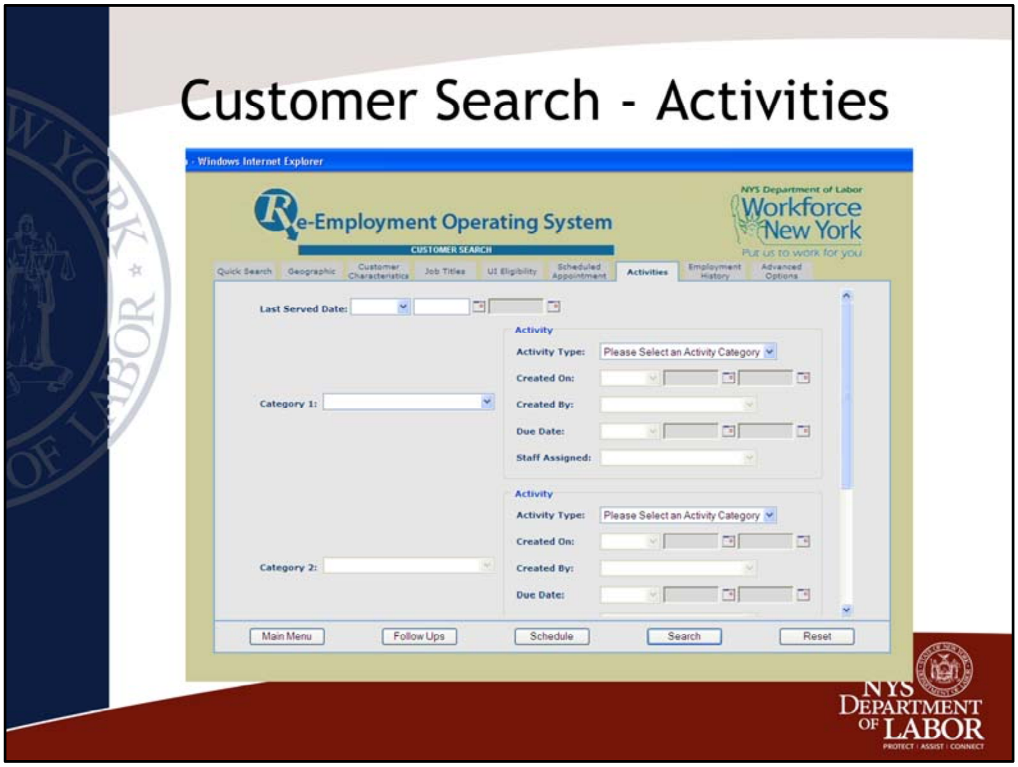
Important Note: System will not allow you to search by Appointment Location or Letter Type if you specified criteria on the Geographic tab (Reporting Office). This is because each office can customize these values which then makes searching for these values in other offices invalid.

Pools

RSO Pool: Weekly Download of New UI Customers for Scheduling

Reschedule Pool: Pool of customers that missed an appointment and need to be rescheduled. Staff have the option of adding customers to the reschedule pool at the time they enter appointment results (will show later in presentation)

Status: Narrow results to only customers that have been Scheduled or Removed from the pool selected.
You can choose to search for customers based on



Activities Tab

Last Served Date: Cannot be used in combination with Geographic (Reporting Office) criteria.

Users can search for up to three Category combinations.

Employment History Tab

If searching by Employer name you should uncheck the Exact Match box to allow for spelling errors/abbreviations.

Advanced Options Tab

This tab allows you to view information without limiting the search results by that field.

The system automatically adds your search criteria fields to the displayed fields list.

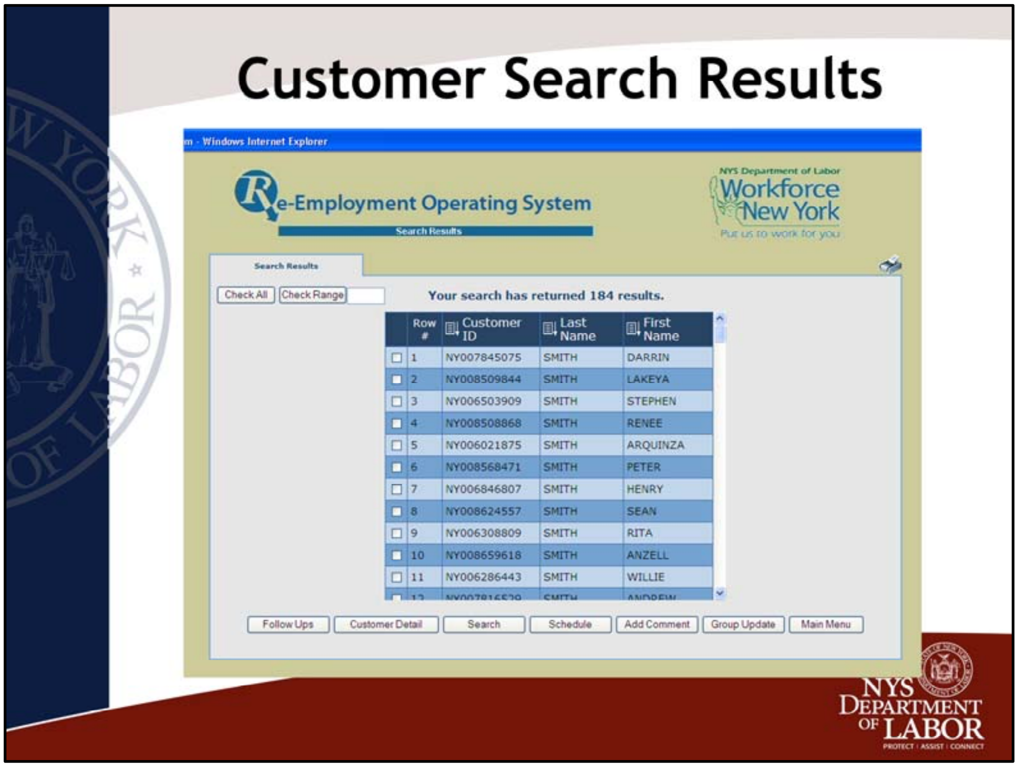
For example you may want to display the Primary Language for the customer without limiting your results.

To display additional fields you should click on the field in the Available Fields column then click the Add button.

You can also remove a field from the Displayed Fields list by selecting the field then click the Remove button.

Sort Results

You can choose to sort you results using up to 3 fields.

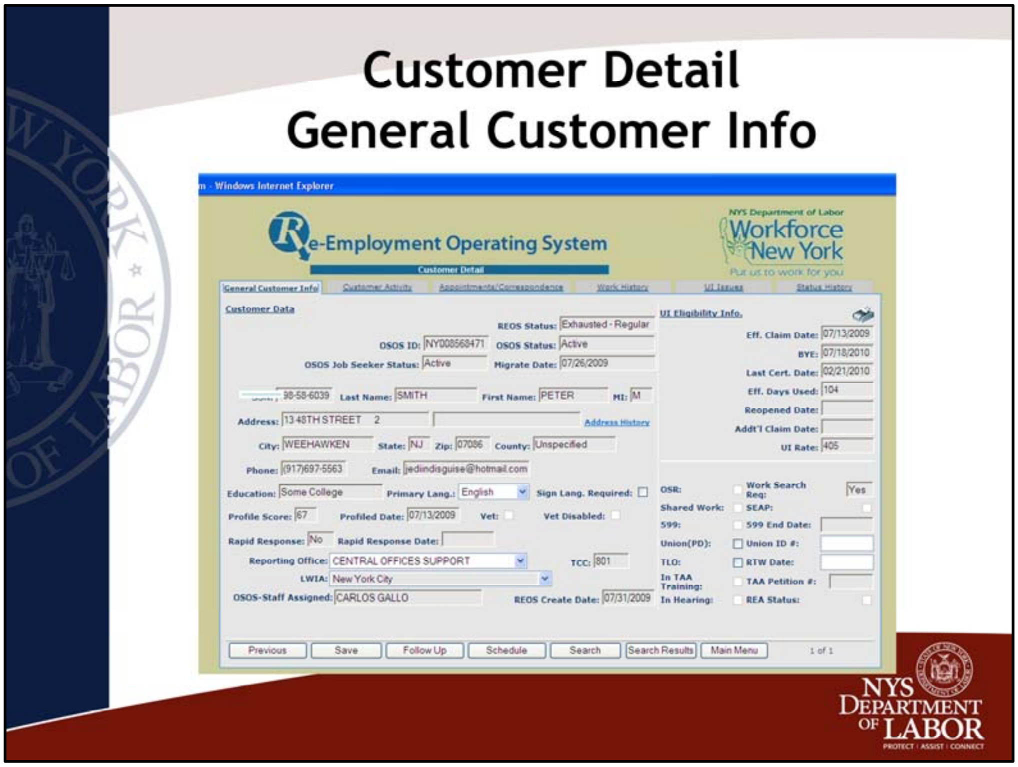


Search Results

Customers are sorted by Last Name unless you choose a sorting order on the Advanced Options Tab.

You can select all customers by clicking on the Check All button or select a range of customers by imputing the starting row number – ending row number and clicking on the Check Range button.

To view the customer record click on the Customer Detail button at the bottom of the screen.



Customer Record

Similar to Search feature, the customer detail record is comprised of multiple tabs.

General Customer Info Tab

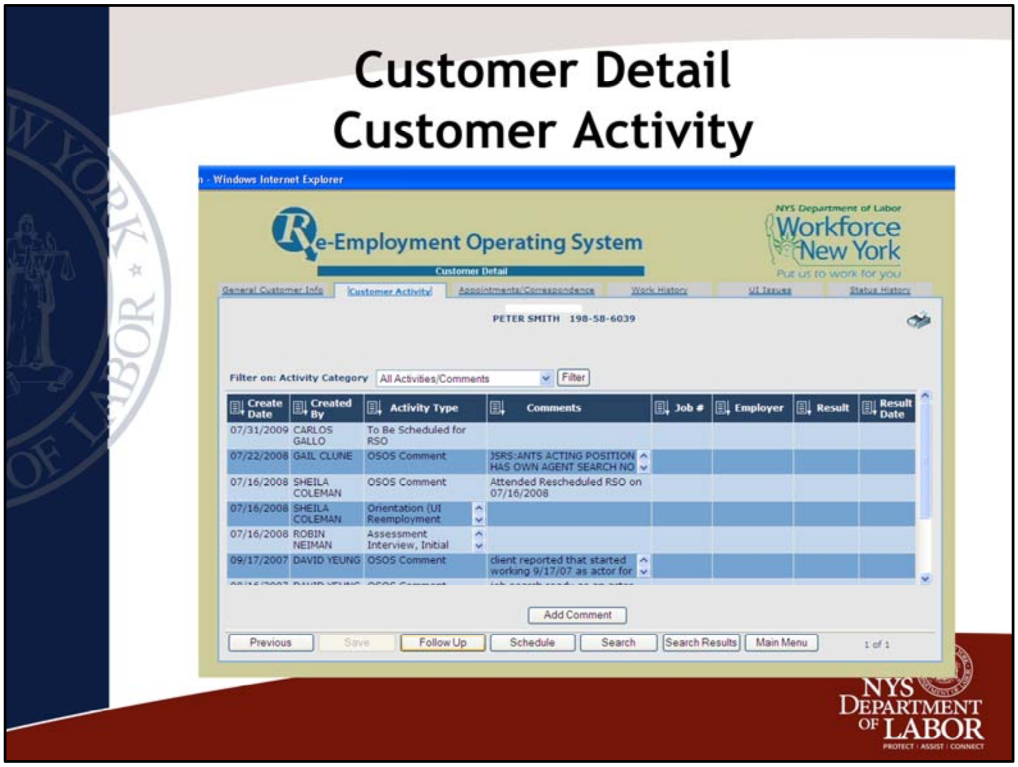
This tab houses the customers demographics. All fields that are grayed out are not editable by staff.

Fields that are pulled from OSOS: OSOS ID, OSOS Status, OSOS Job Seeker Status, SSN, Name, Address, Phone, Email, Education, Sign Lang. Required, Vet, Vet Disabled, Rapid Response & Date, LWIA & OSOS Staff Assigned (Last LWIA/Staff to provide Service)

Fields that are pulled from UI: Migrate Date, Primary Language, Profile Score and Date, TCC, Effective Claim Date, BYE, Last Cert, Effective Days Used, Reopened, Additional Claim Date, UI Rate, OSR, Shared Work, Seap, 599 & 599 End Date, In TAA Training, TAA Petition #, In Hearing, Union (PD), TLO

Fields Generated by REOS: REOS Status, Reporting Office (Assigned by Customers Zip Code), REOS Create Date, Work Search, REA

Fields specific to REOS that users can update or change: Primary Language, Sign Language Required, Reporting Office, Union, Union ID#, TLO and RTW Date

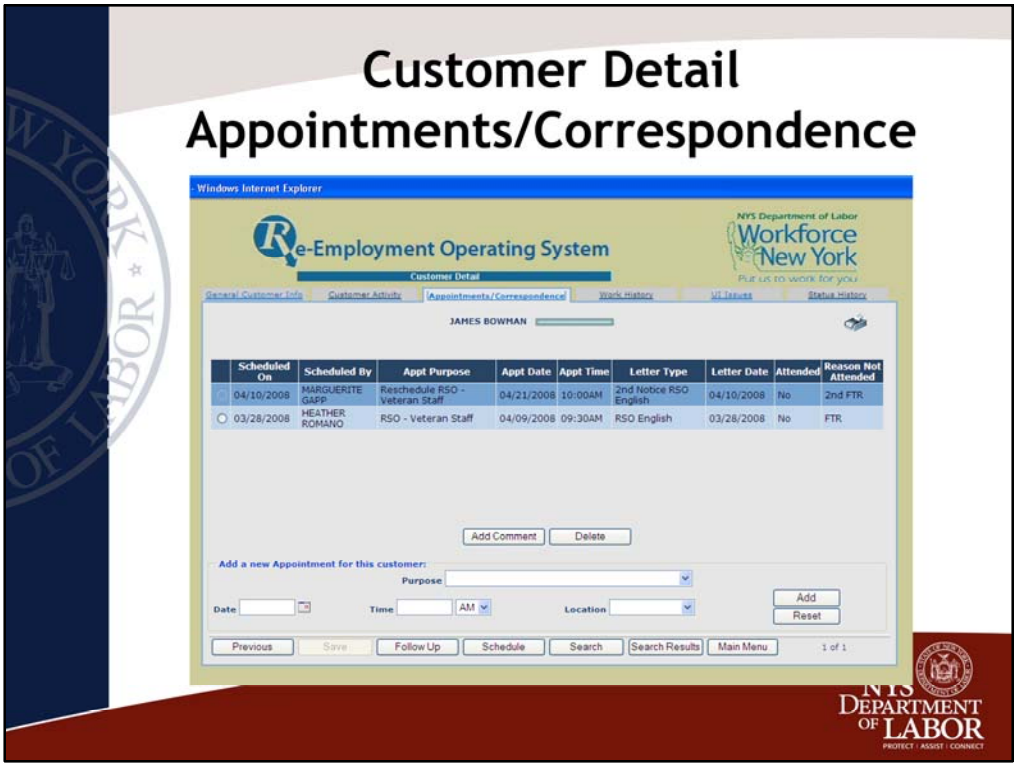


Customer Activity

This screen displays the activity history of the customer.

Currently REOS displays only L1 Services from OSOS. It also displays OSOS Comments (excluding comments entered into Comp Assessment Module of OSOS). However, OSOS does not display REOS comments.

You can add a REOS Comment by clicking on the Add Comment button.

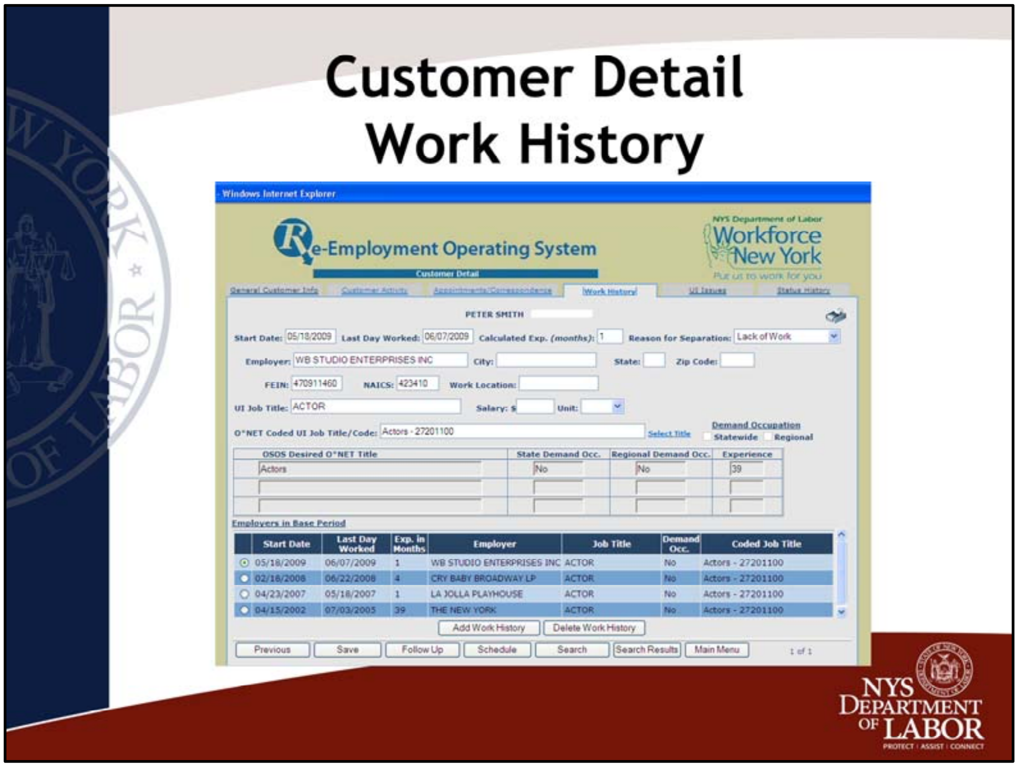


Appointment/Correspondence Tab

This screen displays the customers appointment history.

You can add an appointment without a letter from this screen by completing the Add a new Appointment for this customer section and click the Add button.

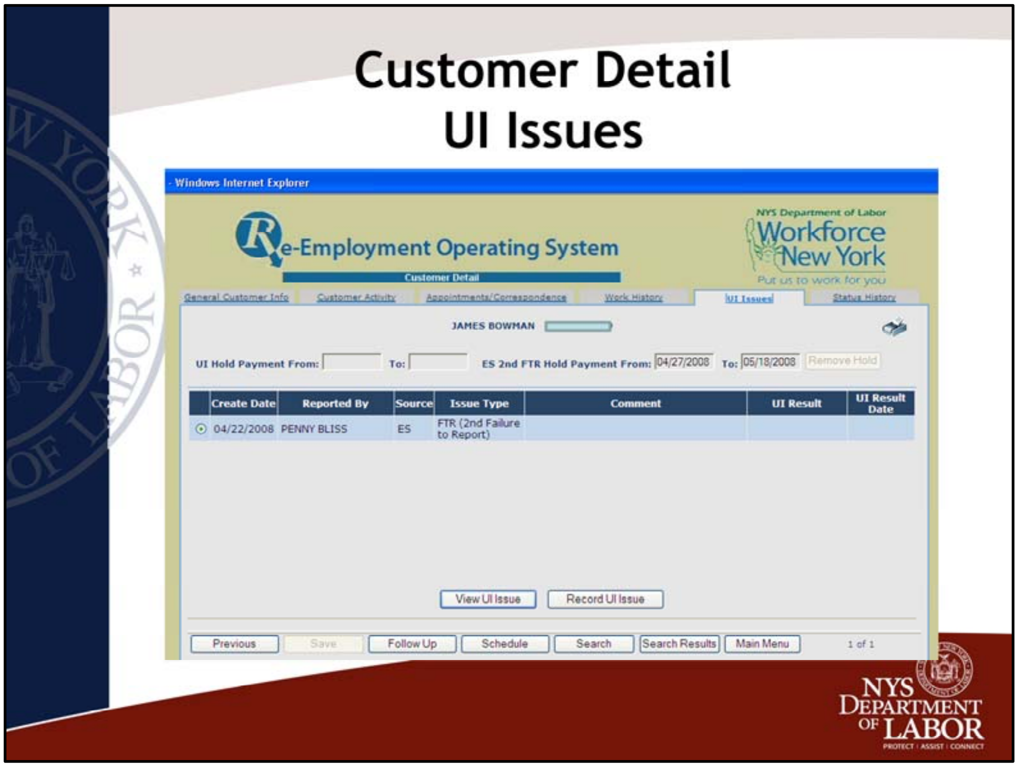
You can also add a REOS comment from this screen.



Work History

This information is gathered from the UI system at the time of filing for UI. You can Add/Edit/Delete work history from REOS.

This screen also displays the OSOS Desired O'Net Title, Statewide & Regional Demand and Experience information from OSOS.

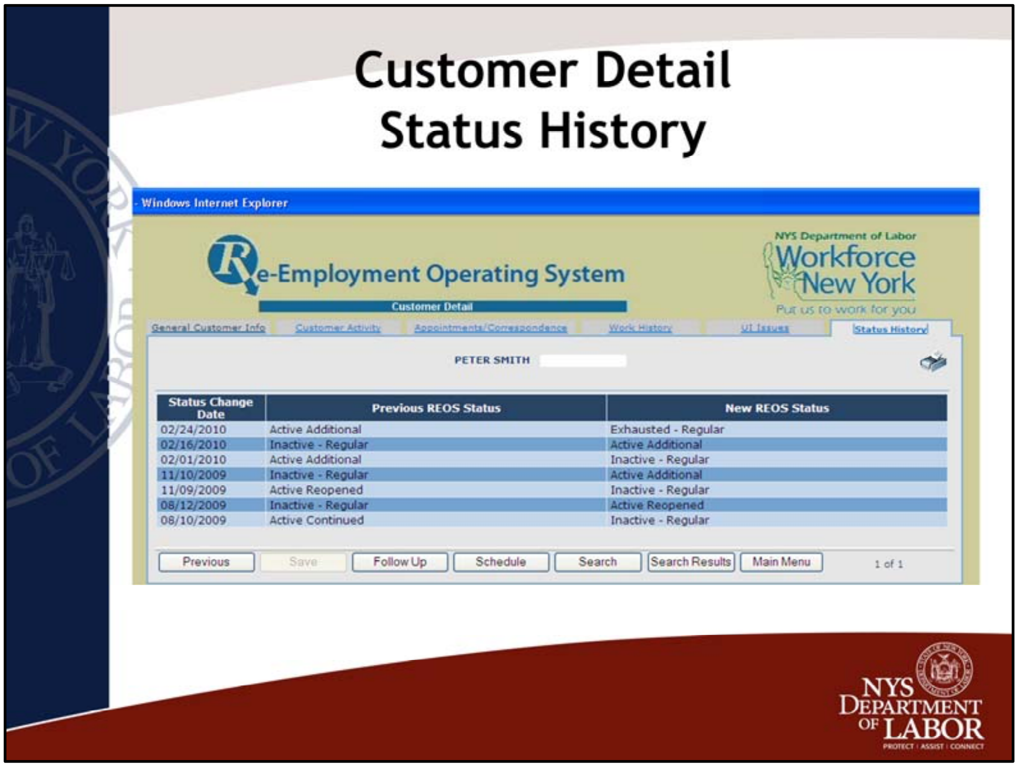


UI Issue Tab

This tab shows all UI Issues reported through REOS to UI. To view the reported issue, select the issue to view and click View UI Issue button.

All UI Issues, with the exception of 2nd FTRs are reported through this screen.

A little later we will cover how to Record UI Issues.



Status History Tab

This screen is a history of when the customer’s REOS Status changes.

How to View/Print Appointments

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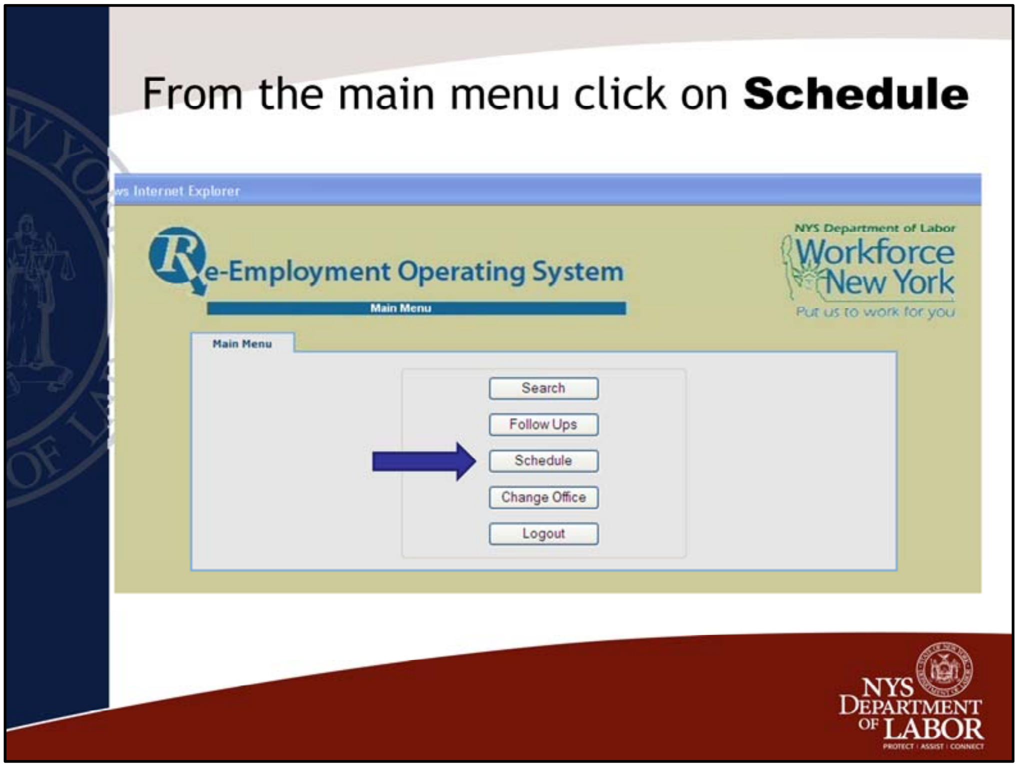
From the main menu click on **Schedule**
Internet Explorer
Re-Employment Operating System
Main Menu
NYS Department of Labor
Workforce New York
Put us to work for you
Main Menu
Search
Follow Ups
Schedule
Change Office
Logout
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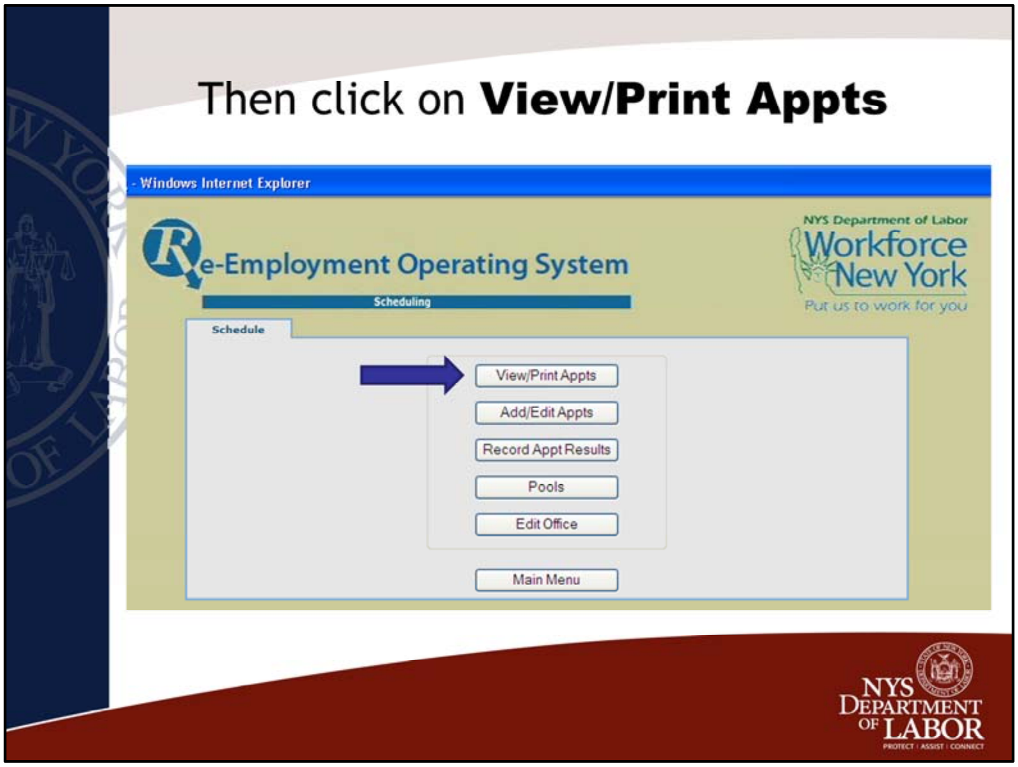
Then click on View/Print Appts
- Windows Internet Explorer
Re-Employment Operating System
Scheduling
NYS Department of Labor
Workforce New York
Put us to work for you
Schedule
View/Print Appts
Add/Edit Appts
Record Appt Results
Pools
Edit Office
Main Menu
NYS Department of Labor
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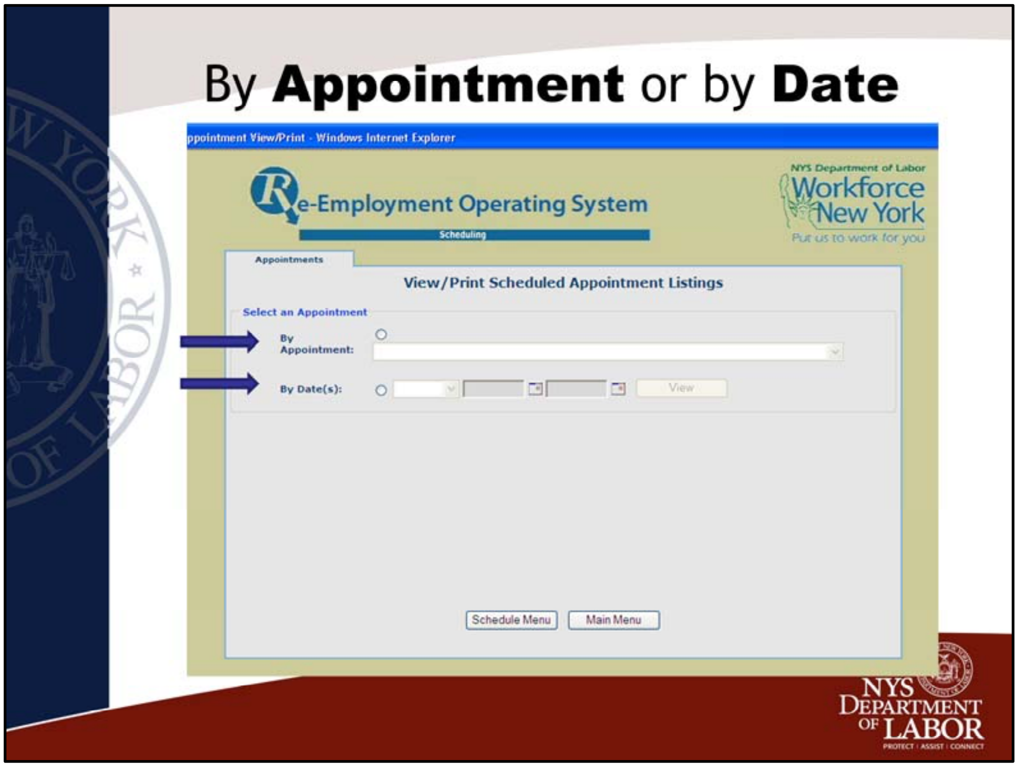
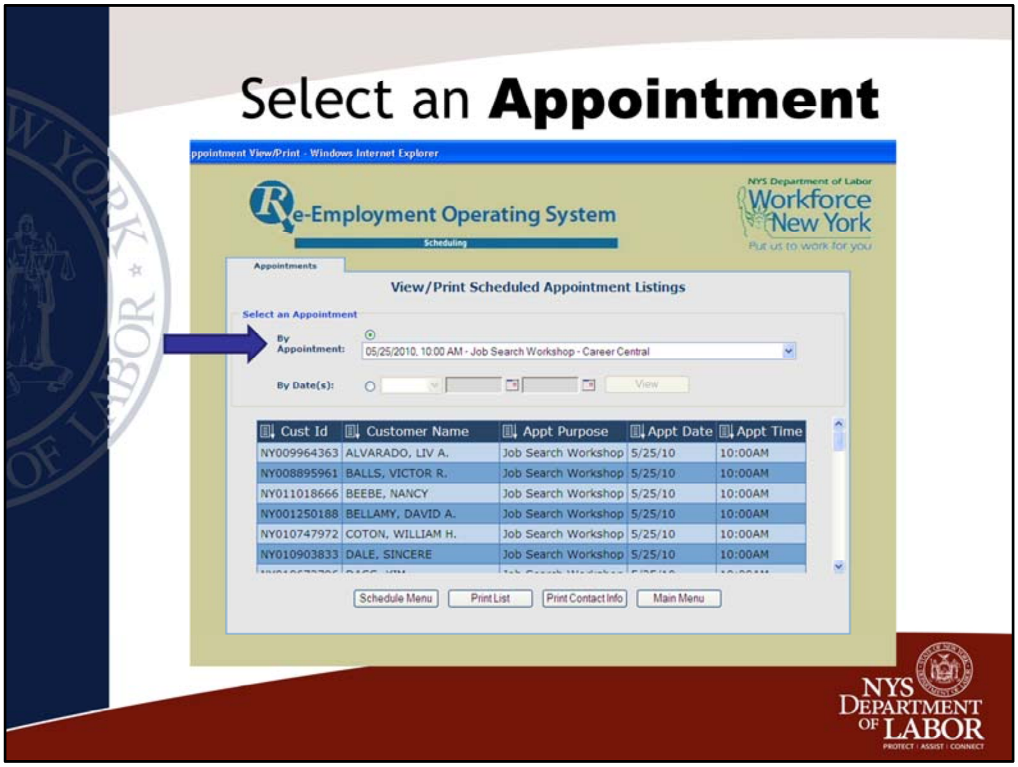
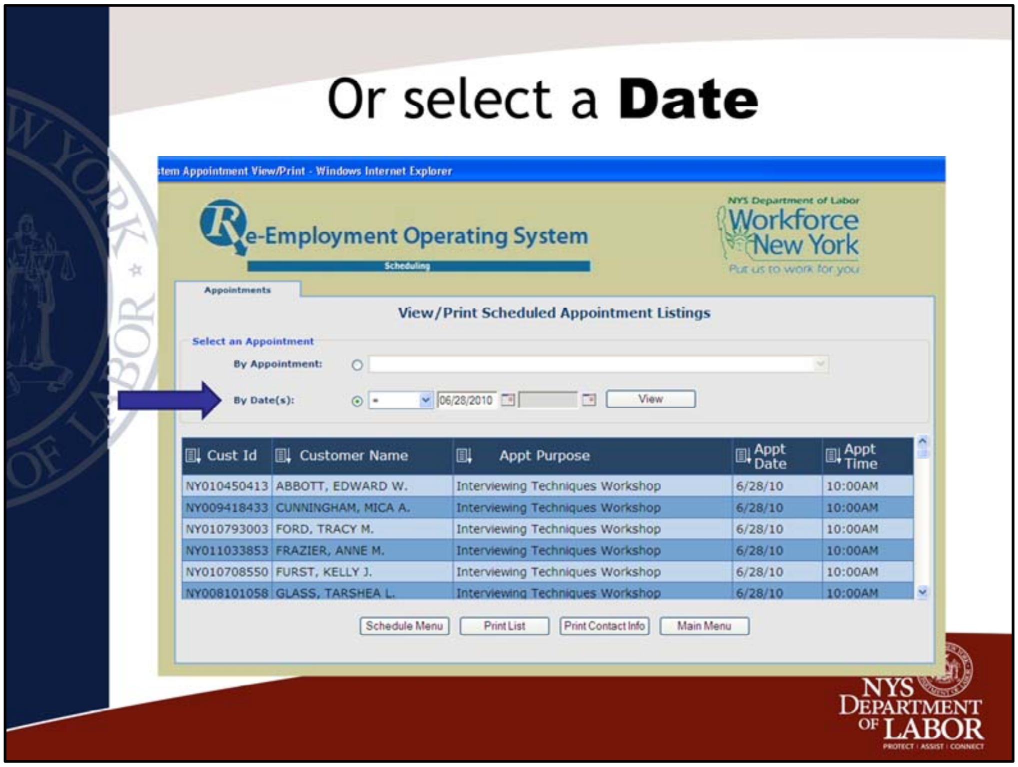


You can choose to view the list of customers for a particular appointment or date or for a range of dates.



To view by appointment you should click the radio button next to the By Appointment Option and select the appointment from the dropdown list. The list of customers scheduled for that particular appointment will be displayed.



In this screen the By Date(s) option was used. You can choose one date or a range of dates, then click the View button and the list of customers is displayed.

The Print List button along the bottom will print an attendance list for customer attendance.

The Print Contact Info button along the bottom will print the list of customers scheduled with their contact information (address & phone).

How to Record Appointment Results

Recording Appointment Results

- **Attendance results can be entered in two ways**

  1. **Record Appointment Results Screen – this is the best way to record results for appointments with multiple attendees**
  2. **Customer Record – this is best used when resulting individual appointments**

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From the Customer Record

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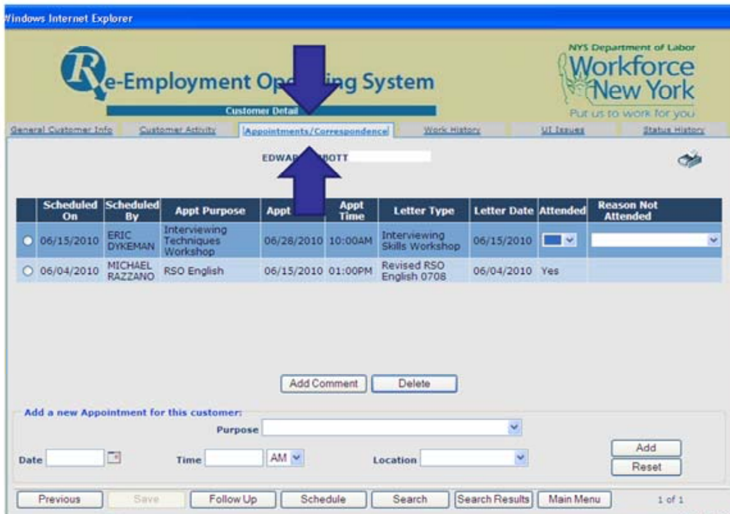
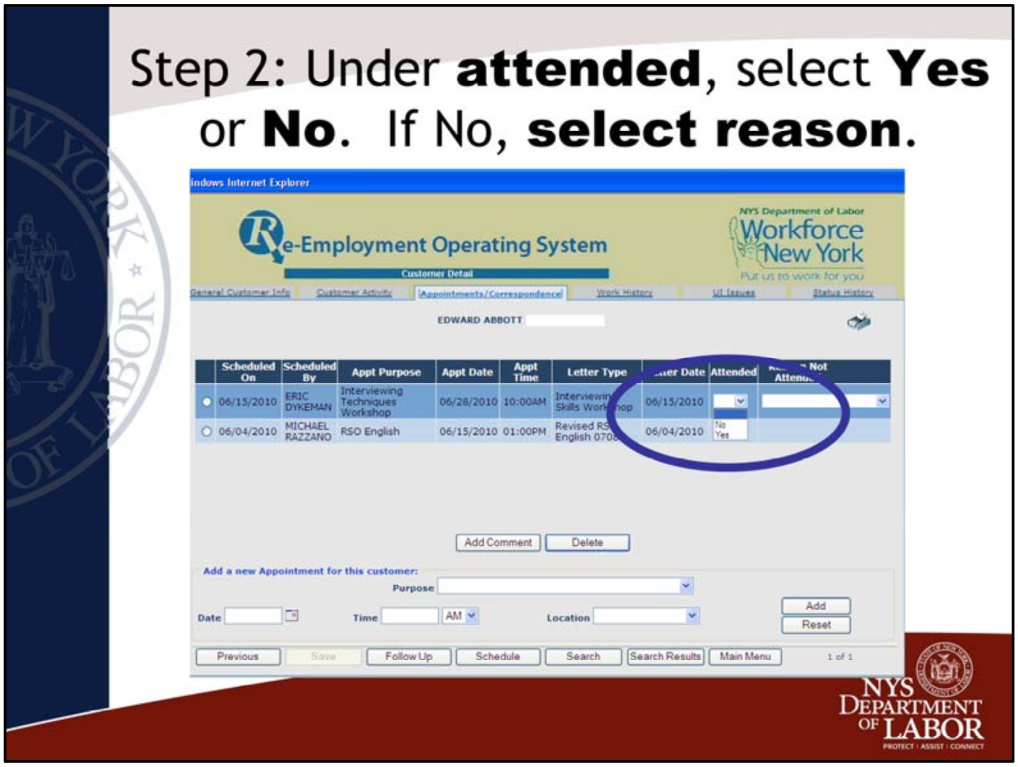
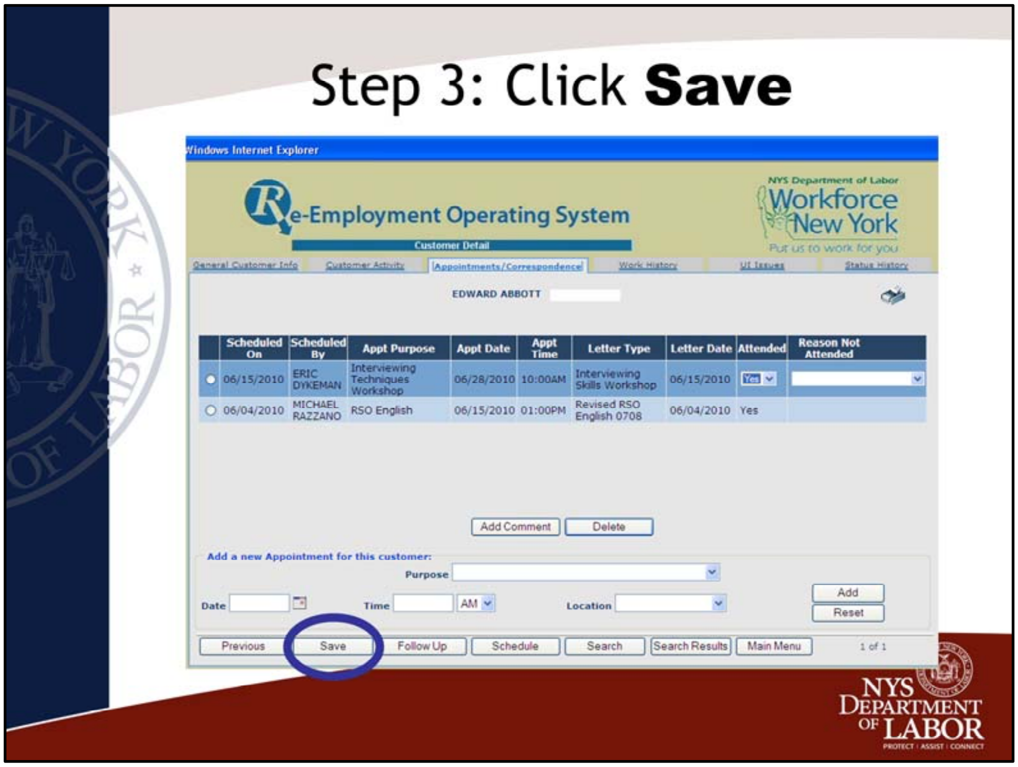
Step 1: Go into Customer Detail **Appointments Correspondence** tab

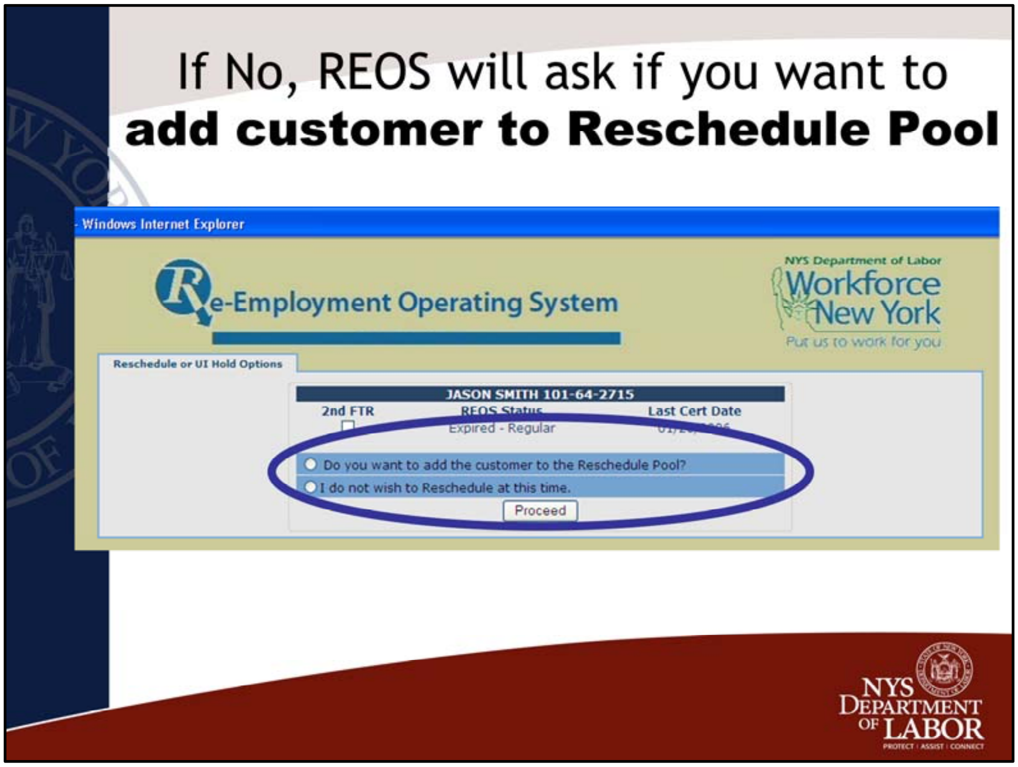




Click the Attended Dropdown and select Yes or No



If you selected No when you click on save the next screen will appear.



At this screen you can choose to add the customer to the reschedule pool or not to reschedule at this time. Click the Proceed button to save results.

If this was the customers 2nd FTR and the customer has an active REOS status, you would get the option to place a hold from this screen.

IMPORTANT NOTE: If you place a second FTR hold on one customer that is part of a group, you will no longer be able to view/result other customers for the same appointment from the Result Appt Attendance Screen. If this happens, you would need to result all of the customers from that appointment through the customer record.

From Record Appt Results

From the Main Menu, click on **Schedule**

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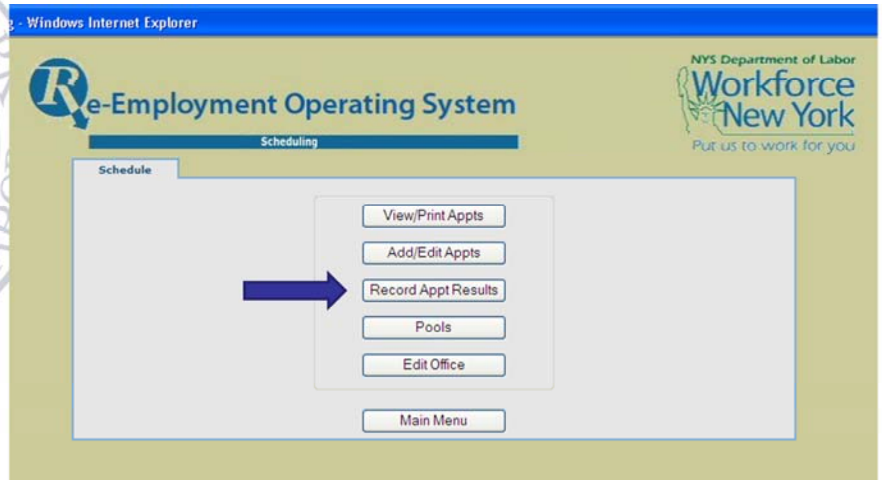
Click on **Record Appt Results**



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Choose by **Appointment** or by **Date**

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Select by **Appointment**

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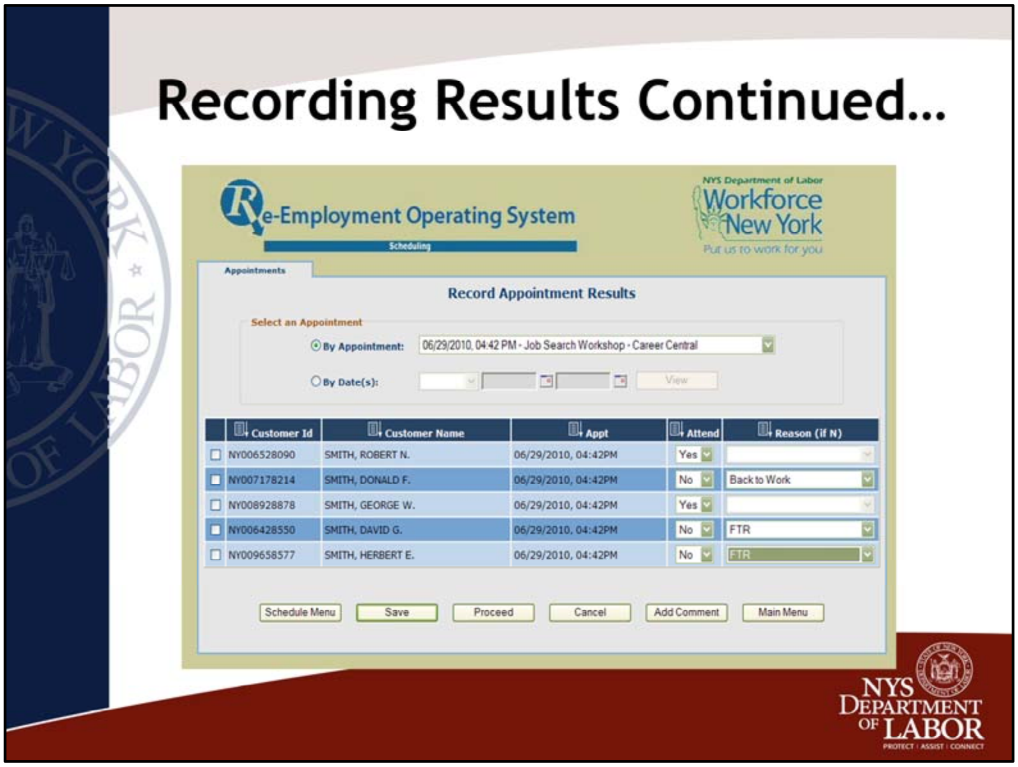
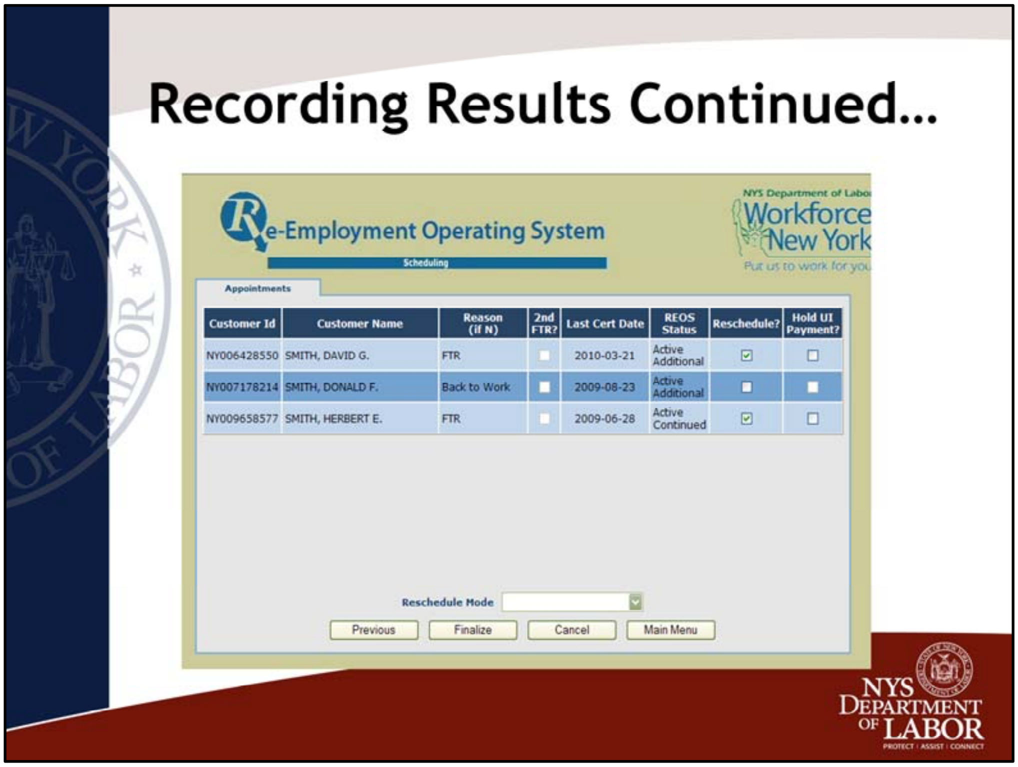


Results must be entered for each customer. If the customer did not attend you must select a reason before finalizing. Once you have entered the results for each customer click on Proceed.

You can click on the Save button at any time. When doing this the customers that attended will disappear from the list.

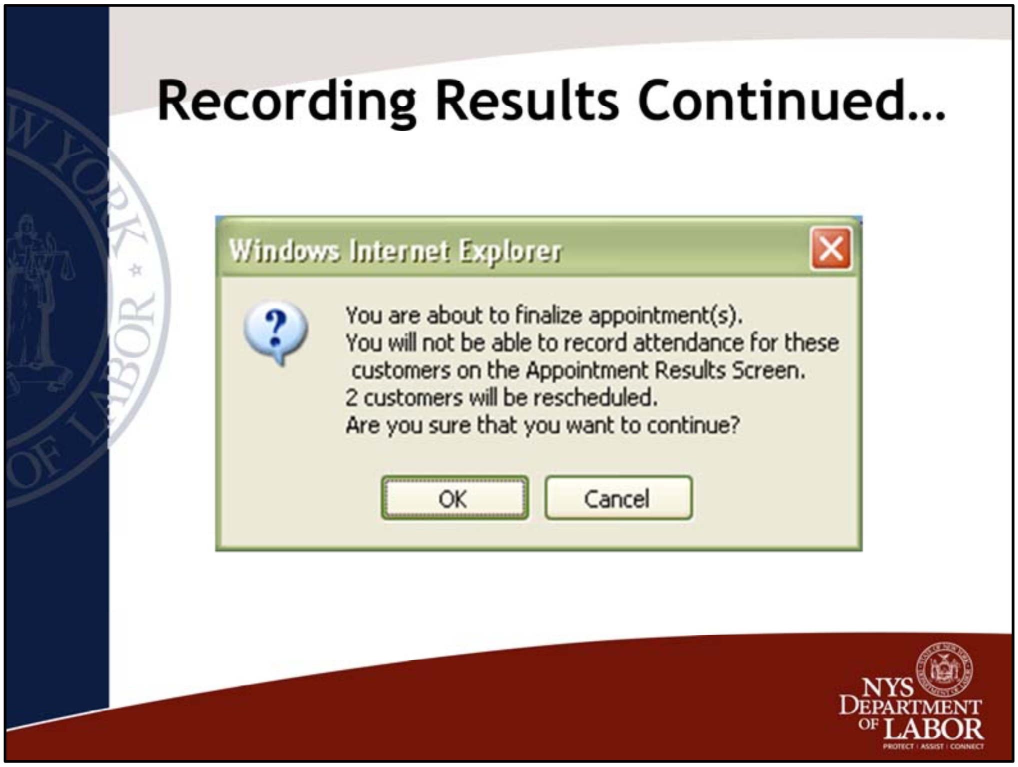


You are now left with only the customers that did not attend. If the customer was an FTR the system determines if this is the second, if it is the system will put a check in the 2nd FTR and Hold UI Payment? Columns, but if it is the first the Reschedule? Box will be checked. If the customer was back to work the customer is not preselected to be rescheduled.

If you are choosing to reschedule customers you must select an option from the Reschedule Mode box (Schedule Now or Add to Reschedule Pool)

Click on Finalize to complete the process. A verification box will pop up summarizing what you are about to do " Add 2 customers to Reschedule Pool…"

Click OK



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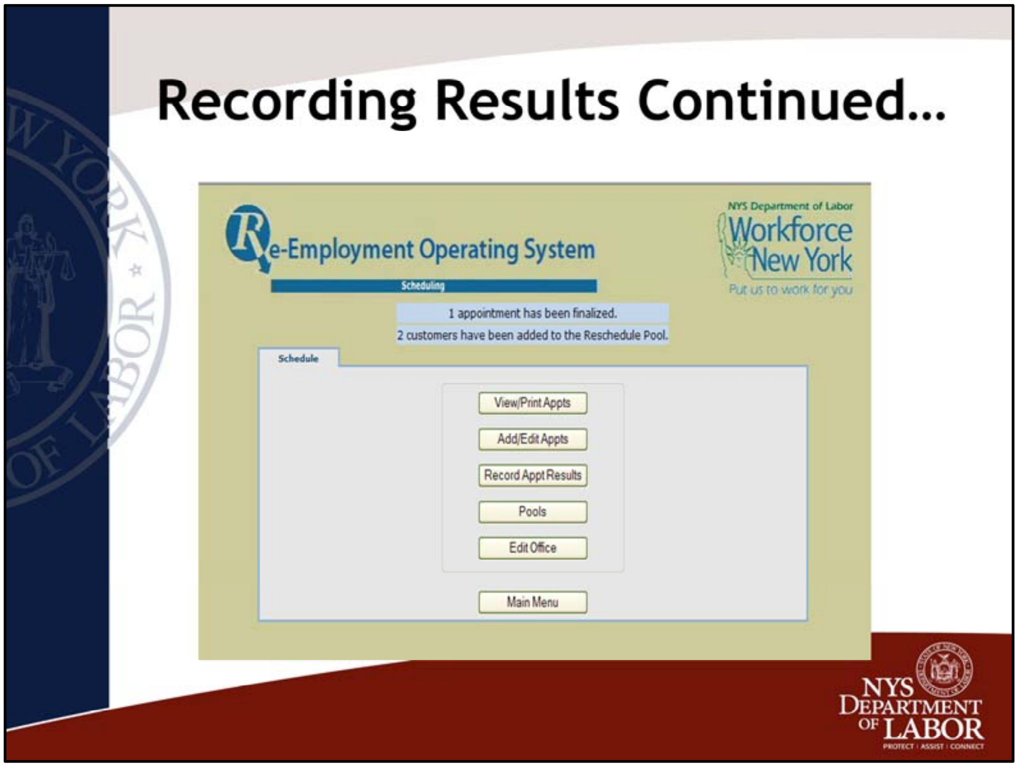
Click OK



You will now get the confirmation stating that the appointment has been finalized.

How to Record UI Issues

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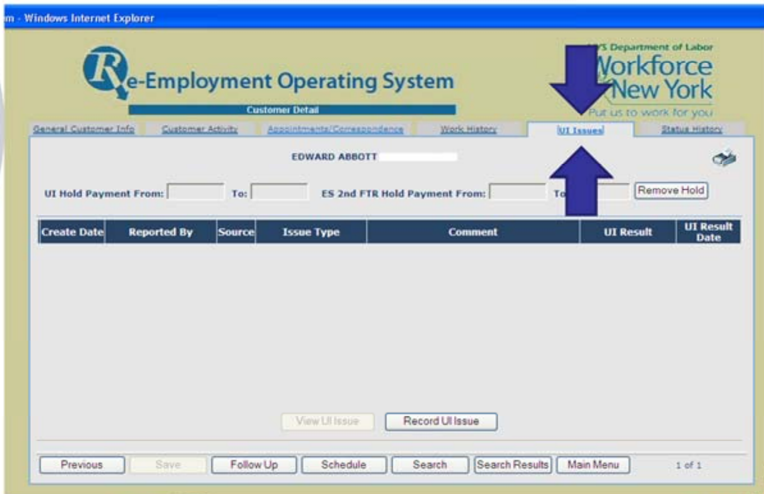
Step 1: Go to Customer Detail
UI Issues Tab



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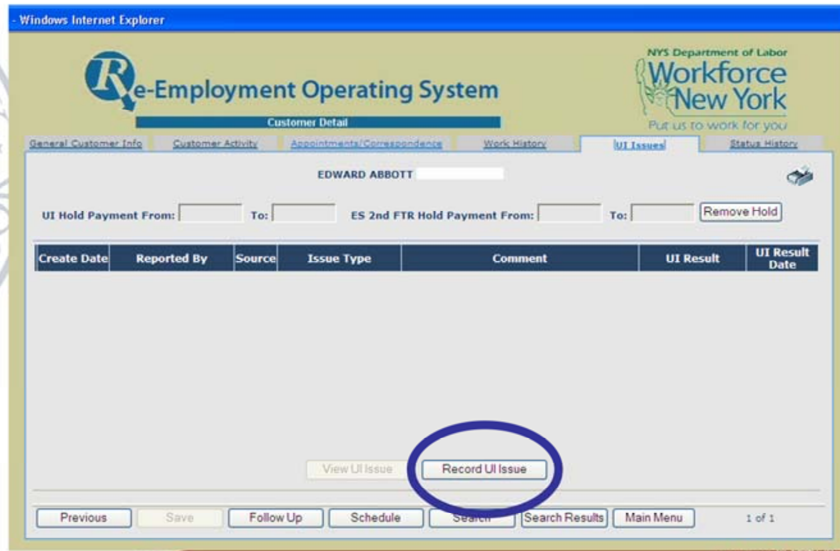
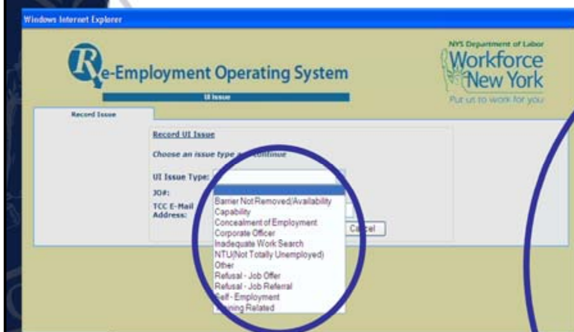
Step 2: Click on **Record UI Issue**



Step 3: Select **Issue Type**



- Barrier Not Removed/Availability
- Capability
- Concealment of Employment
- Corporate Officer
- Inadequate Work Search
- NTU (Not Totally Unemployed)
- Other
- Refusal – Job Offer
- Refusal – Job Referral
- Self – Employment
- Training Related

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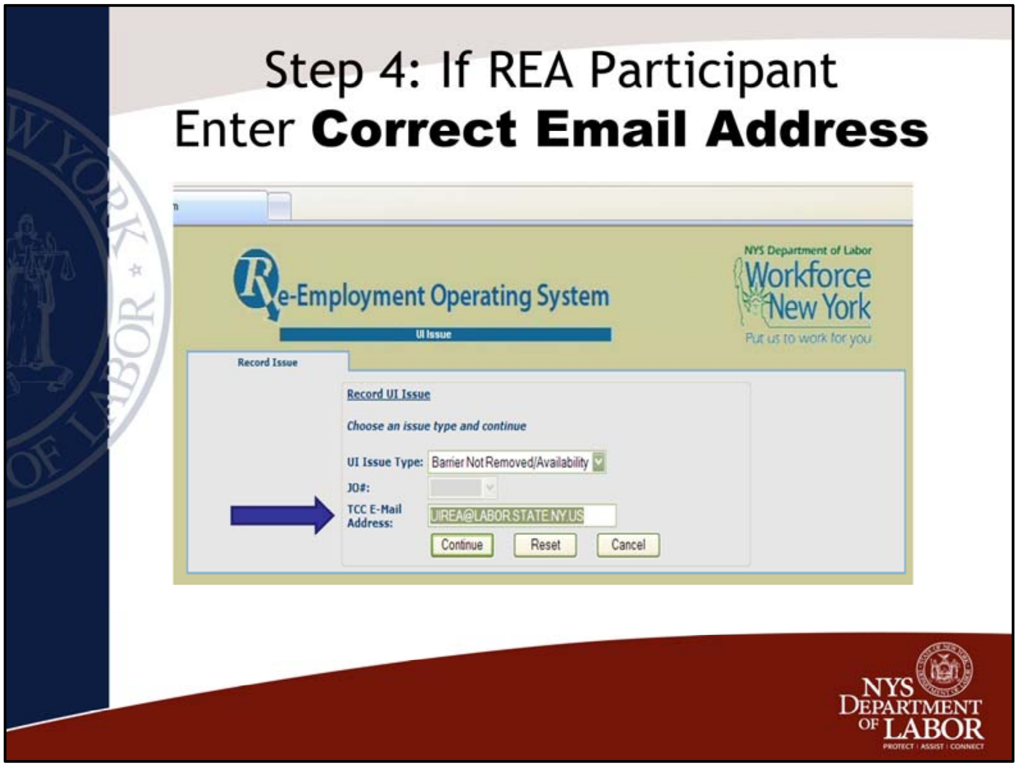

Click Continue

Refer to UI Issues Handbook for further details and samples of each issue

Questions?

- **REOS Help Desk Email:** Help.Reos@labor.ny.gov

- **REOS Desk Guide:** http://www.labor.ny.gov/workforcenypartners/reos/reosmanual.pdf

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