

# My Case Load Tab OSOS Guide



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## PURPOSE

OSOS users have the ability to create a personal case load to manage both customer and business contact records.

Users can view their case load, but not the case load of other users.

A customer and/or business contact can be included in more than one staff person's case load.

A user may execute a search using their own case load with customized search criteria and data print or export the results to an Excel spreadsheet.

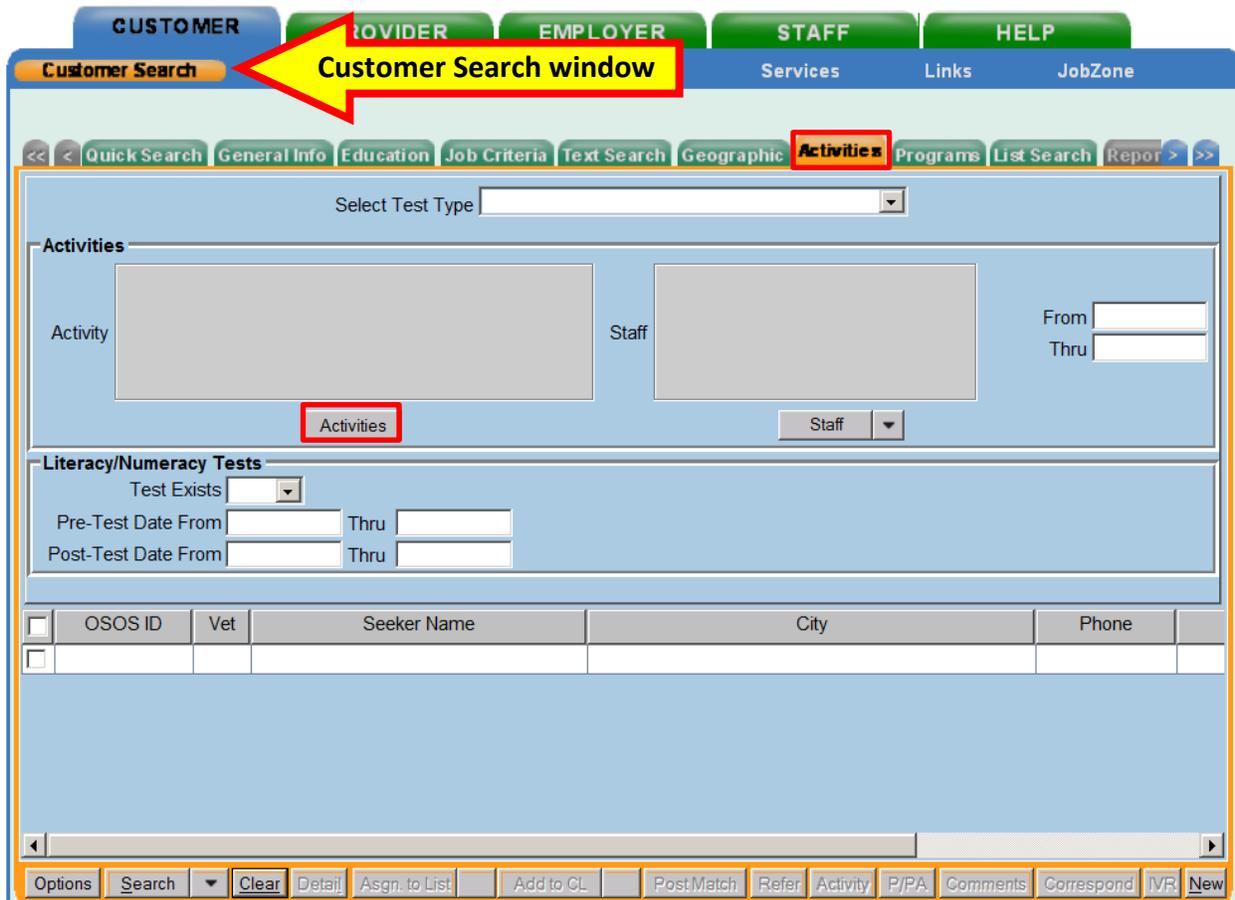
## OSOS DATA ENTRY

### CREATING AND MAINTAINING THE CUSTOMER CASE LOAD

Users may create their initial or new case load from past and current customers by beginning with a customer search.

Select the **Activities** tab in the **Customer Search** window.

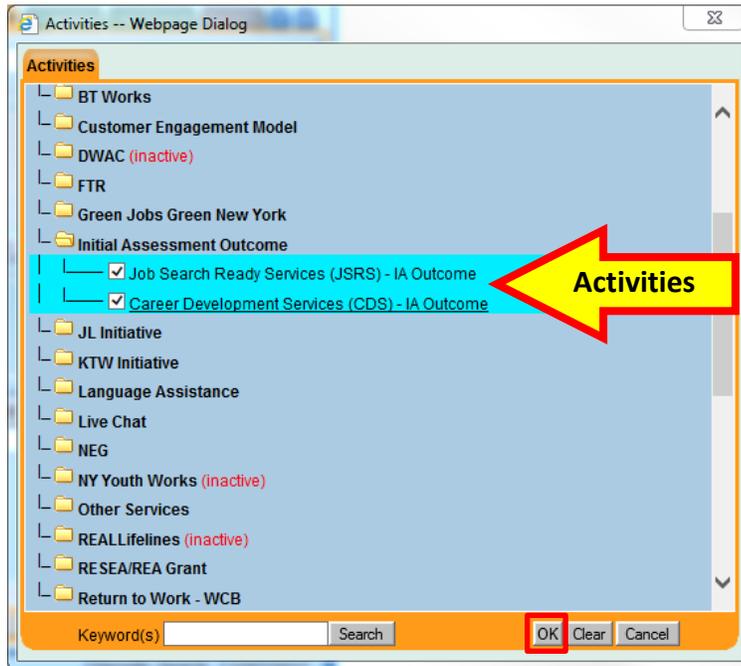
Click the **Activities** button.



The screenshot shows the OSOS Customer Search window. The 'CUSTOMER' tab is selected in the top navigation bar. A yellow arrow points to the 'Customer Search' button. The 'Activities' tab is selected in the sub-navigation bar. The 'Activities' button is highlighted with a red box. The form contains a 'Select Test Type' dropdown, an 'Activities' section with 'Activity' and 'Staff' input fields, and a 'Literacy/Numeracy Tests' section with 'Test Exists' dropdown and date range inputs. A table with columns 'OSOS ID', 'Vet', 'Seeker Name', 'City', and 'Phone' is visible at the bottom. The bottom toolbar includes buttons for 'Options', 'Search', 'Clear', 'Detail', 'Asgn. to List', 'Add to CL', 'Post/Match', 'Refer', 'Activity', 'P/PA', 'Comments', 'Correspond', 'IVR', and 'New'.

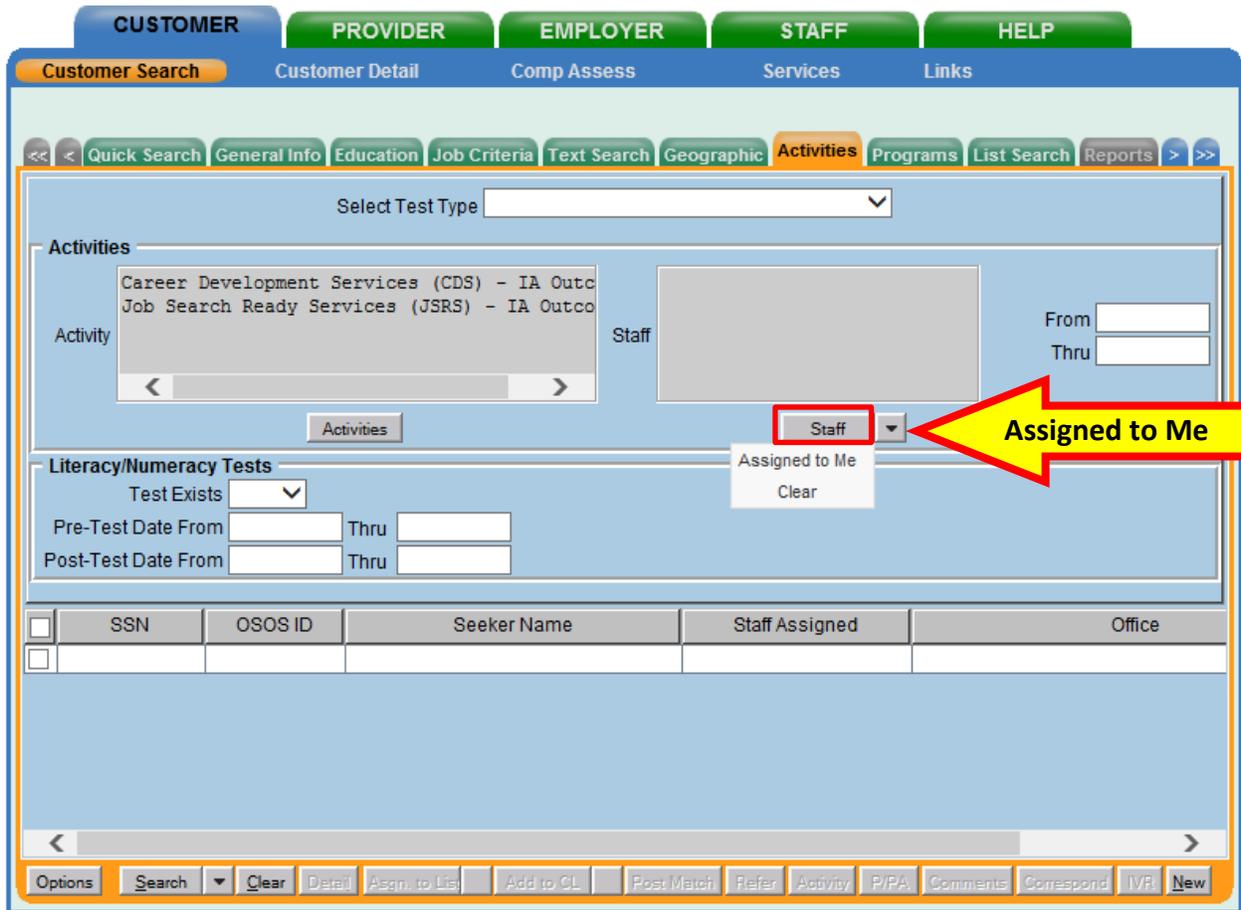
Select any activities within the **Activities - - Webpage Dialog** box that will identify the desired customers.

Click the **OK** button.



Next, click the **Staff** button.

Clicking the arrow next to the **Staff** button will allow users to search for customers assigned to themselves.



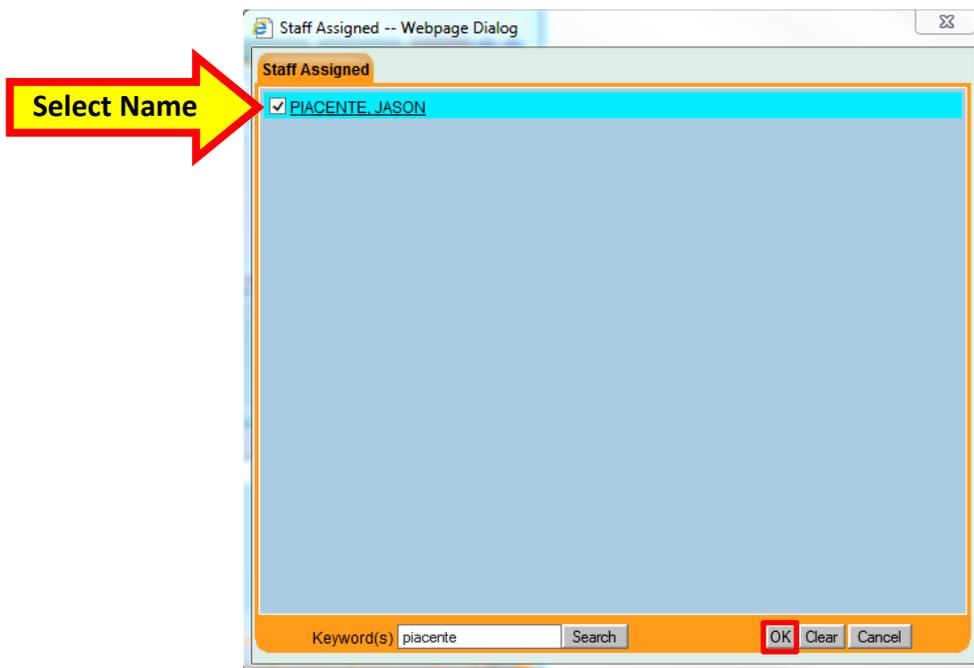
The screenshot shows the OSOS interface with the following elements:

- Top navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP.
- Sub-navigation tabs: Customer Search, Customer Detail, Comp Assess, Services, Links.
- Secondary navigation tabs: Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, Reports.
- Main content area:
  - Select Test Type dropdown.
  - Activities section with a list of activities (e.g., Career Development Services (CDS) - IA Outc, Job Search Ready Services (JSRS) - IA Outco) and a Staff selection area.
  - Literacy/Numeracy Tests section with Test Exists dropdown, Pre-Test Date From/Thru, and Post-Test Date From/Thru fields.
  - A dropdown menu for 'Staff' is highlighted with a red box, and a yellow arrow points to it with the text 'Assigned to Me'.
- Table with columns: SSN, OSOS ID, Seeker Name, Staff Assigned, Office.
- Bottom toolbar with buttons: Options, Search, Clear, Detail, Assign to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, New.

Enter the last name of the staff member in the **Keyword(s)** data field and click the **Search** button in the **Staff Assigned - - Webpage Dialog** box:



Select the appropriate name and click the **OK** button.

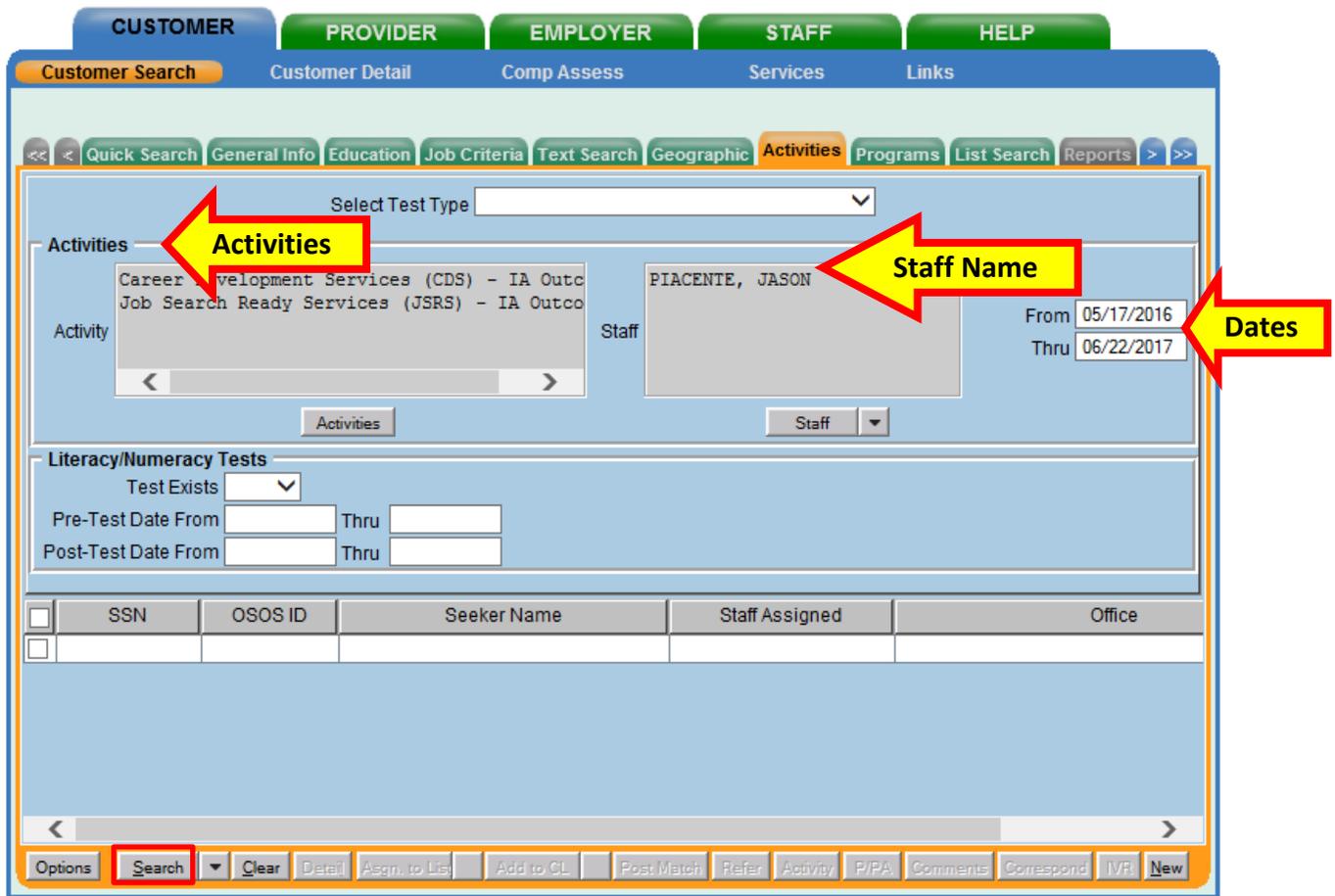


The selected activities and staff member's name will be visible.

Enter a date range in the **From** and **Thru** data fields.

Click the **Search** button.

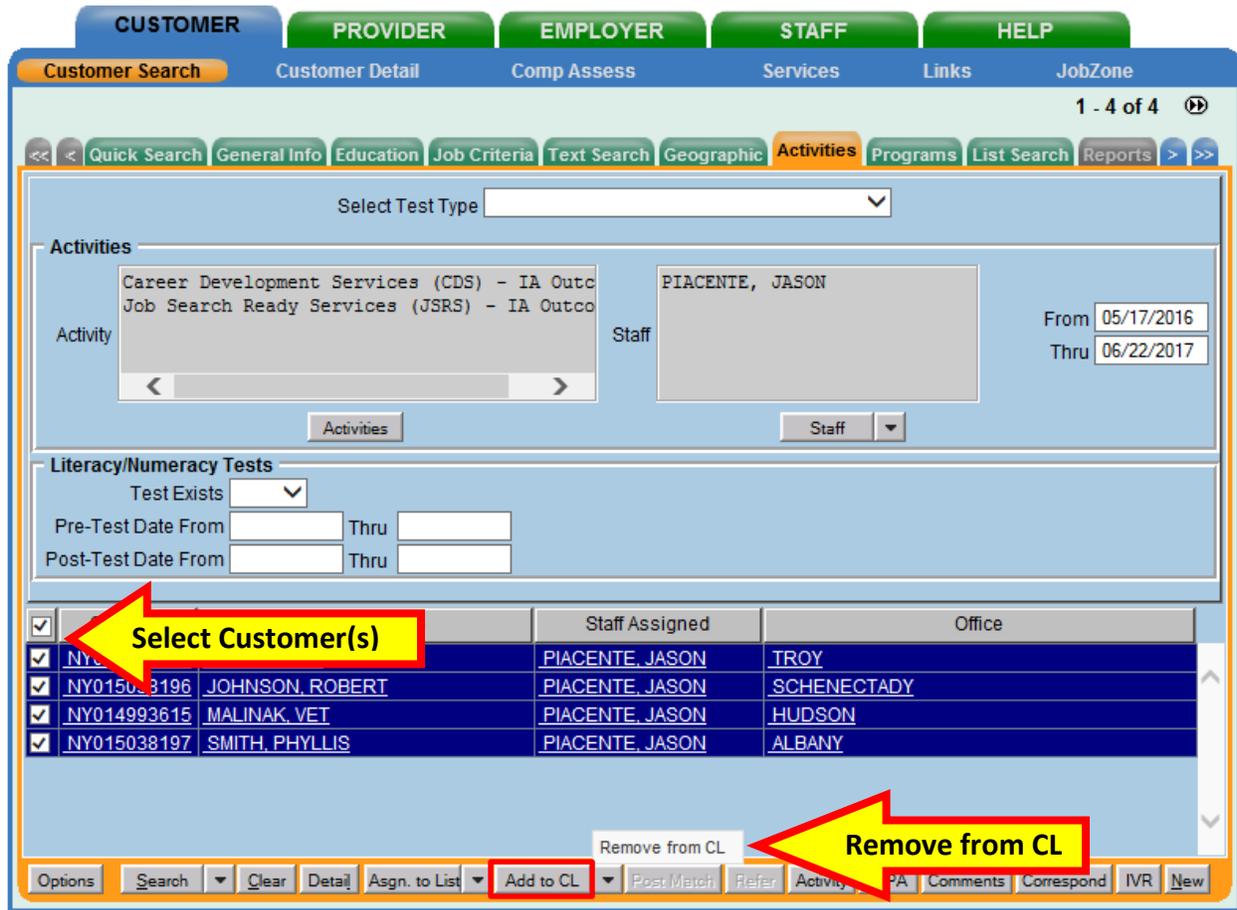
This will identify any customer(s) who received any of the services by the selected staff member within the date range specified. If the system identifies too many results to display, then edit the date range to lower the results.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, and Links. The main content area has a sub-menu with options: Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, Activities (highlighted), Programs, List Search, and Reports. The 'Activities' section includes a 'Select Test Type' dropdown, an 'Activities' list (showing 'Career Development Services (CDS) - IA Outc' and 'Job Search Ready Services (JSRS) - IA Outc'), a 'Staff' field (showing 'PIACENTE, JASON'), and 'From'/'Thru' date fields (showing '05/17/2016' and '06/22/2017'). The 'Literacy/Numeracy Tests' section has a 'Test Exists' dropdown and 'Pre-Test Date From/Thru' and 'Post-Test Date From/Thru' fields. At the bottom, there is a table with columns: SSN, OSOS ID, Seeker Name, Staff Assigned, and Office. The 'Search' button is highlighted in red.

Select the customer(s) to be added to the case load and click the **Add to CL** button. The **Add to CL** button is accessible and available within all tabs of the **Customer Search** window.

Clicking the arrow next to the **Add to CL** button will access the **Remove from CL** option.



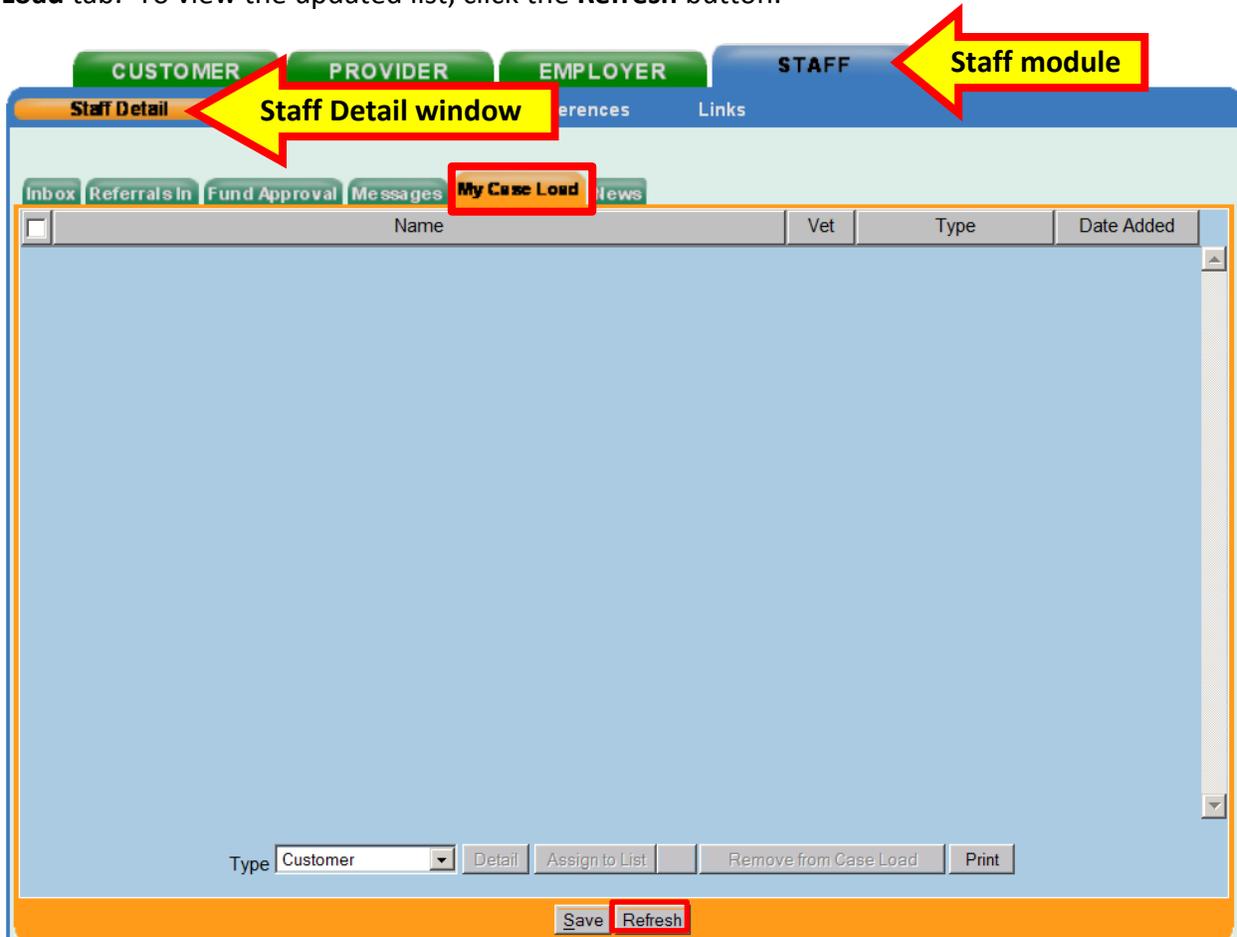
The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The main area contains a search form with a 'Select Test Type' dropdown, an 'Activities' section with a list of activities and a 'Staff' dropdown, and a 'Literacy/Numeracy Tests' section with date filters. Below the form is a table with columns for checkboxes, customer information, 'Staff Assigned', and 'Office'. A red arrow points to the 'Select Customer(s)' column. At the bottom, there is a toolbar with buttons for 'Options', 'Search', 'Clear', 'Detail', 'Asgn. to List', 'Add to CL', 'Post Match', 'Refer', 'Activity', 'PA', 'Comments', 'Correspond', 'IVR', and 'New'. A red arrow points to the 'Remove from CL' button, which is a small icon next to the 'Add to CL' button.

		Staff Assigned	Office
<input checked="" type="checkbox"/>	NY01503196	PIACENTE, JASON	TROY
<input checked="" type="checkbox"/>	JOHNSON, ROBERT	PIACENTE, JASON	SCHENECTADY
<input checked="" type="checkbox"/>	MALINAK, VET	PIACENTE, JASON	HUDSON
<input checked="" type="checkbox"/>	SMITH, PHYLLIS	PIACENTE, JASON	ALBANY

Selecting customers that are already in the case load and clicking the **Add to CL** button will not create a duplicate listing.

The same availability to add and remove business contacts exists within the **Employer** module. However, this feature is not available in the **Provider** module.

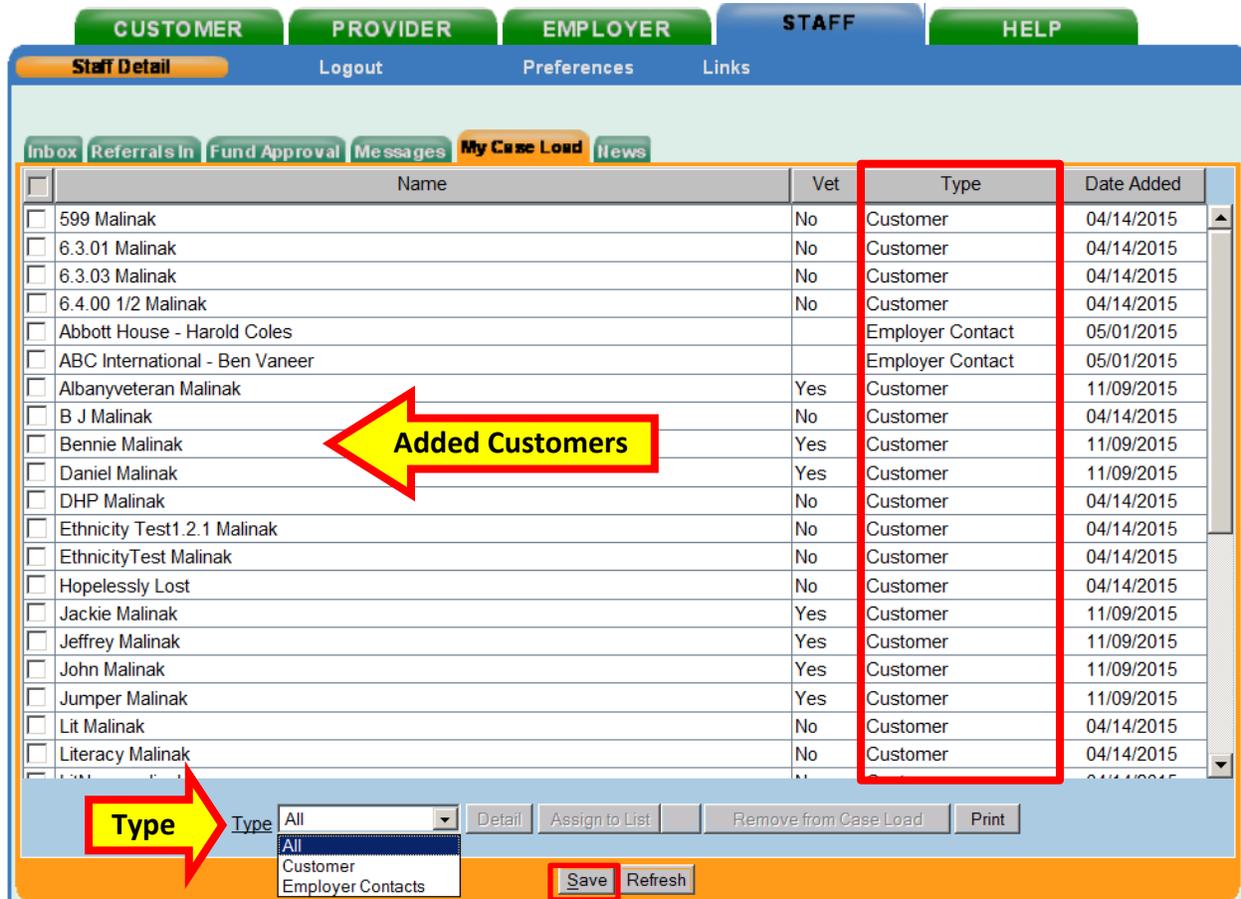
To view the case load, click the **Staff** module, then the **Staff Detail** window, then the **My Case Load** tab. To view the updated list, click the **Refresh** button.



It is necessary to click the **Refresh** button to confirm when customers and business contacts are removed.

Click the **Save** button when finished.

To view both customer and business contacts in the case load, select **All** from the **Type** dropdown menu. Users may select multiple customers or business contacts, but may not combine individuals from the two types concurrently when adding, removing, or selecting the **Detail** button.



The screenshot shows the 'My Case Load' tab in the OSOS interface. At the top, there are navigation buttons for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are tabs for Staff Detail, Logout, Preferences, and Links. The main area contains a sub-menu with options like Inbox, Referrals in, Fund Approval, Messages, My Case Load (selected), and News. A table lists various contacts with columns for Name, Vet, Type, and Date Added. A red box highlights the 'Type' column, and a yellow arrow points to the 'All' option in the dropdown menu. Another yellow arrow points to the 'Save' button at the bottom of the interface.

Name	Vet	Type	Date Added
<input type="checkbox"/> 599 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.3.01 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.4.00 1/2 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Abbott House - Harold Coles		Employer Contact	05/01/2015
<input type="checkbox"/> ABC International - Ben Vaneer		Employer Contact	05/01/2015
<input type="checkbox"/> Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> B J Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> DHP Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> EthnicityTest Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Hopelessly Lost	No	Customer	04/14/2015
<input type="checkbox"/> Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Lit Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Literacy Malinak	No	Customer	04/14/2015

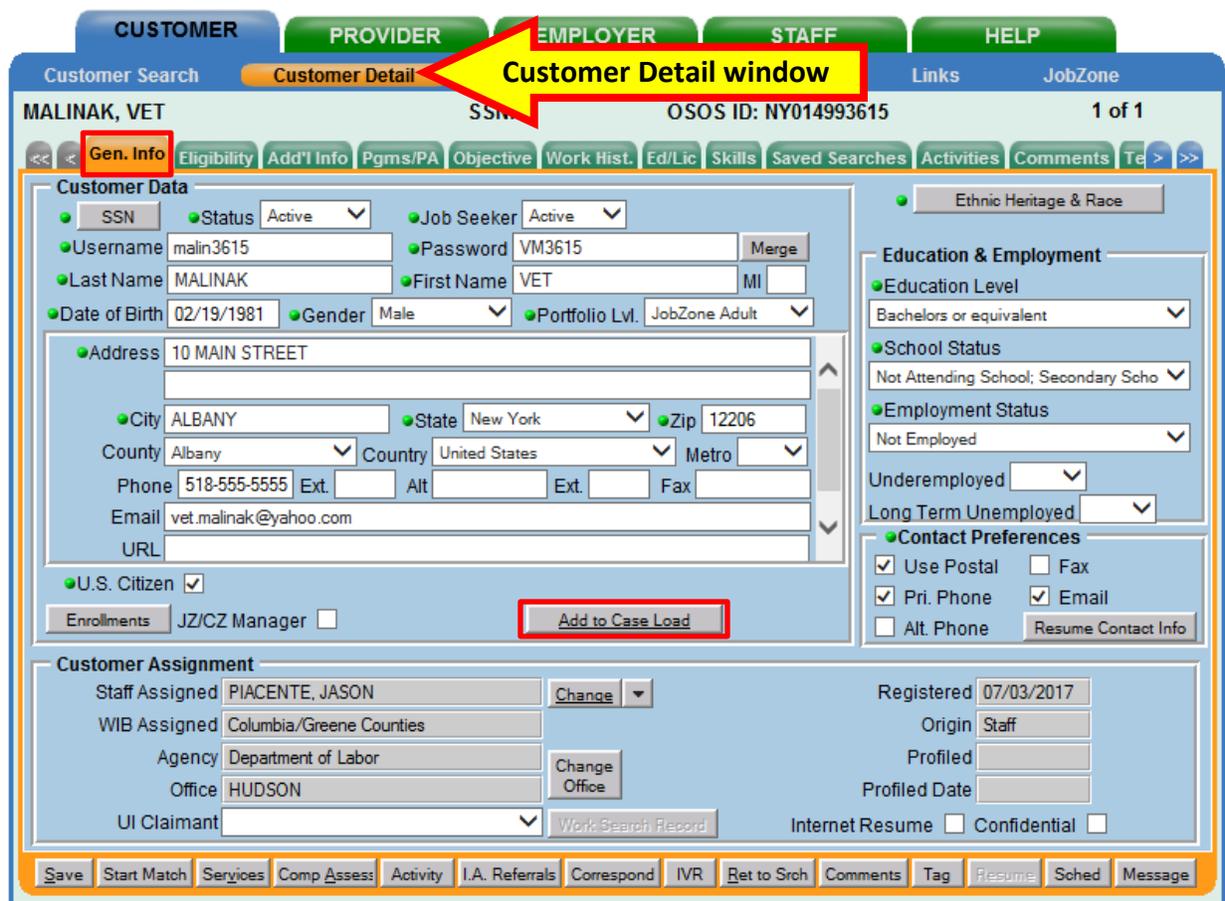
## ADDING INDIVIDUAL CUSTOMERS TO MY CASE LOAD

When you are in the customer's record, you can add them to the case load. This can be done from the **Customer Detail** window in the **General Info** tab. This feature is not available in the **Comprehensive Assessment** or **Services** tabs.

The **Add to Case Load** button is located in the middle of the screen (highlighted below).

Click the **Add to Case Load** button to add the customer to the case load.

There is no need to save the record.



The screenshot displays the OSOS Customer Detail window for a customer named MALINAK, VET. The window is divided into several sections:

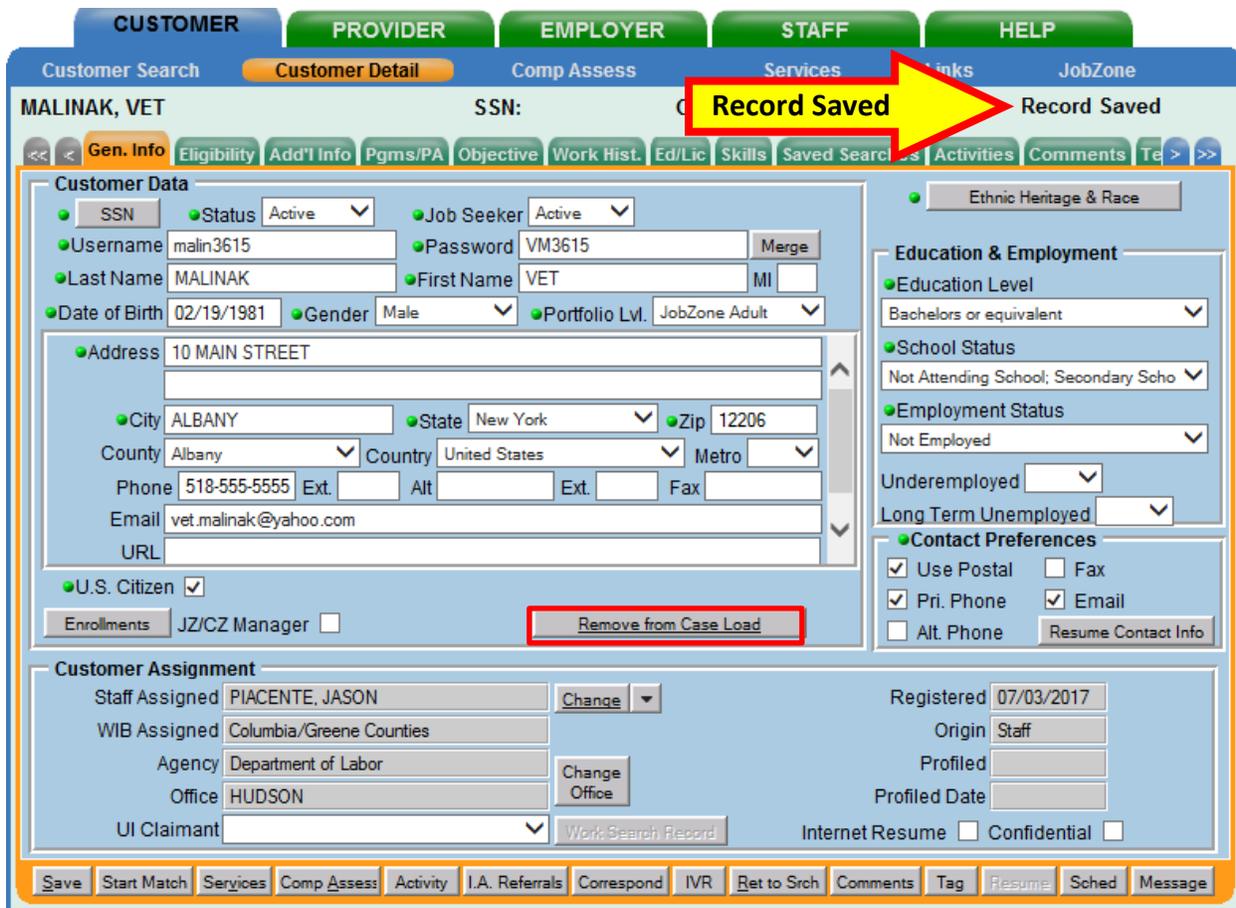
- Customer Data:** Includes fields for SSN, Status (Active), Job Seeker (Active), Username (malin3615), Password (VM3615), Last Name (MALINAK), First Name (VET), Date of Birth (02/19/1981), Gender (Male), Portfolio Lvl. (JobZone Adult), Address (10 MAIN STREET), City (ALBANY), State (New York), Zip (12206), County (Albany), Country (United States), Metro, Phone (518-555-5555), Email (vet.malinak@yahoo.com), and U.S. Citizen (checked).
- Education & Employment:** Includes Education Level (Bachelors or equivalent), School Status (Not Attending School; Secondary Scho), Employment Status (Not Employed), Underemployed, and Long Term Unemployed.
- Contact Preferences:** Includes checkboxes for Use Postal, Fax, Pri. Phone, Email, and Alt. Phone, along with a Resume Contact Info button.
- Customer Assignment:** Includes Staff Assigned (PIACENTE, JASON), WIB Assigned (Columbia/Greene Counties), Agency (Department of Labor), Office (HUDSON), UI Claimant, Registered (07/03/2017), Origin (Staff), Profiled, Profiled Date, and Internet Resume (checked).

The **Add to Case Load** button is highlighted with a red box in the Customer Data section. A yellow arrow points to the **Customer Detail** window title, and a red box highlights the **Gen. Info** tab.

After adding the record to the case load, the “Record Saved” confirmation message will briefly appear in the top right hand corner.

The **Add to Case Load** button will have changed to a **Remove from Case Load** button.

The availability of the **Remove from Case Load** button confirms that the customer has been added to the case load.

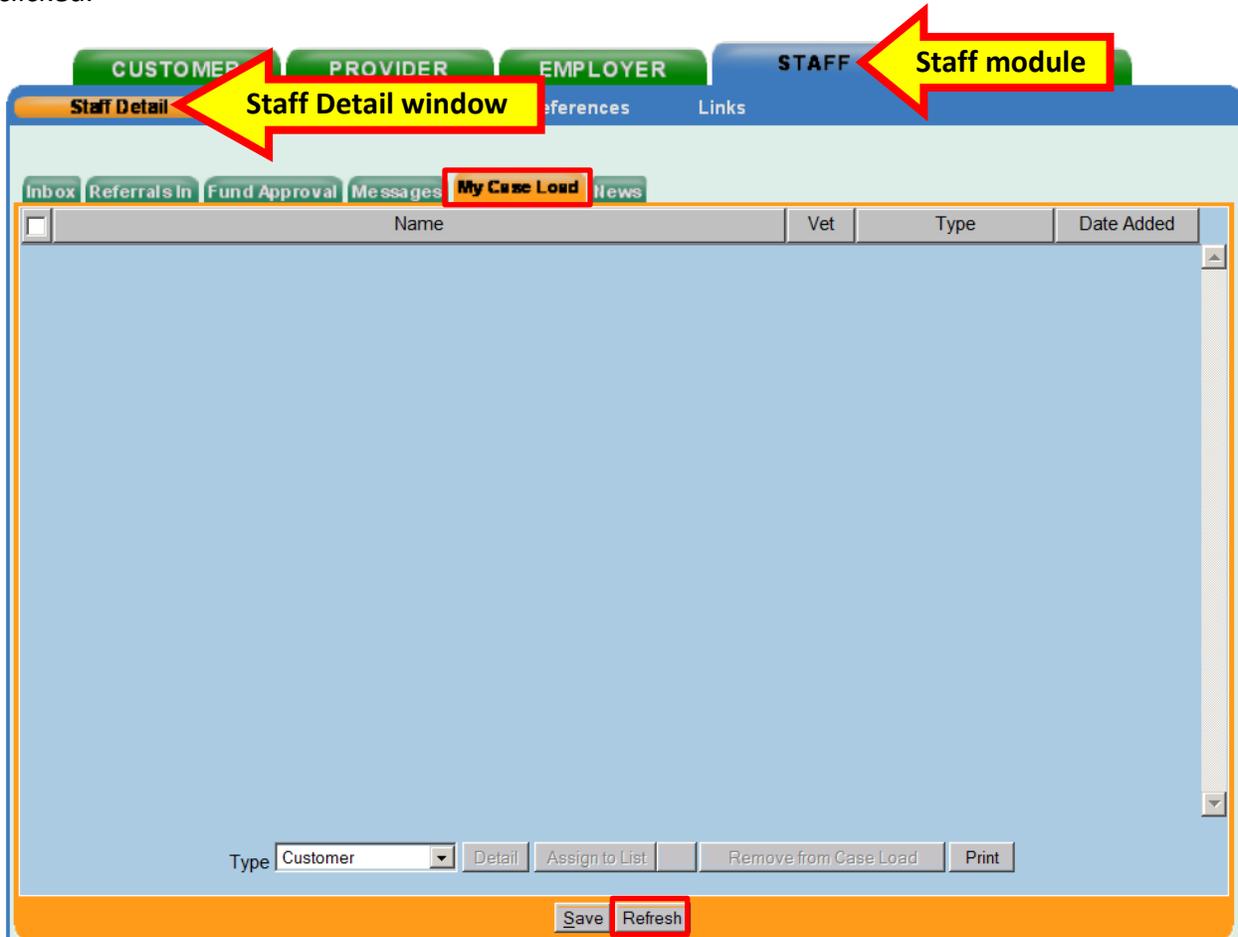


The screenshot displays the OSOS Customer Detail form for MALINAK, VET. The form is organized into several sections:

- Customer Data:** Includes fields for SSN (VM3615), Username (malin3615), Last Name (MALINAK), First Name (VET), Date of Birth (02/19/1981), Gender (Male), and Address (10 MAIN STREET, ALBANY, New York, 12206).
- Education & Employment:** Includes Education Level (Bachelors or equivalent), School Status (Not Attending School; Secondary Scho), and Employment Status (Not Employed).
- Contact Preferences:** Includes checkboxes for Use Postal, Fax, Pri. Phone, Email, and Alt. Phone.
- Customer Assignment:** Includes Staff Assigned (PIACENTE, JASON), WIB Assigned (Columbia/Greene Counties), Agency (Department of Labor), and Office (HUDSON).

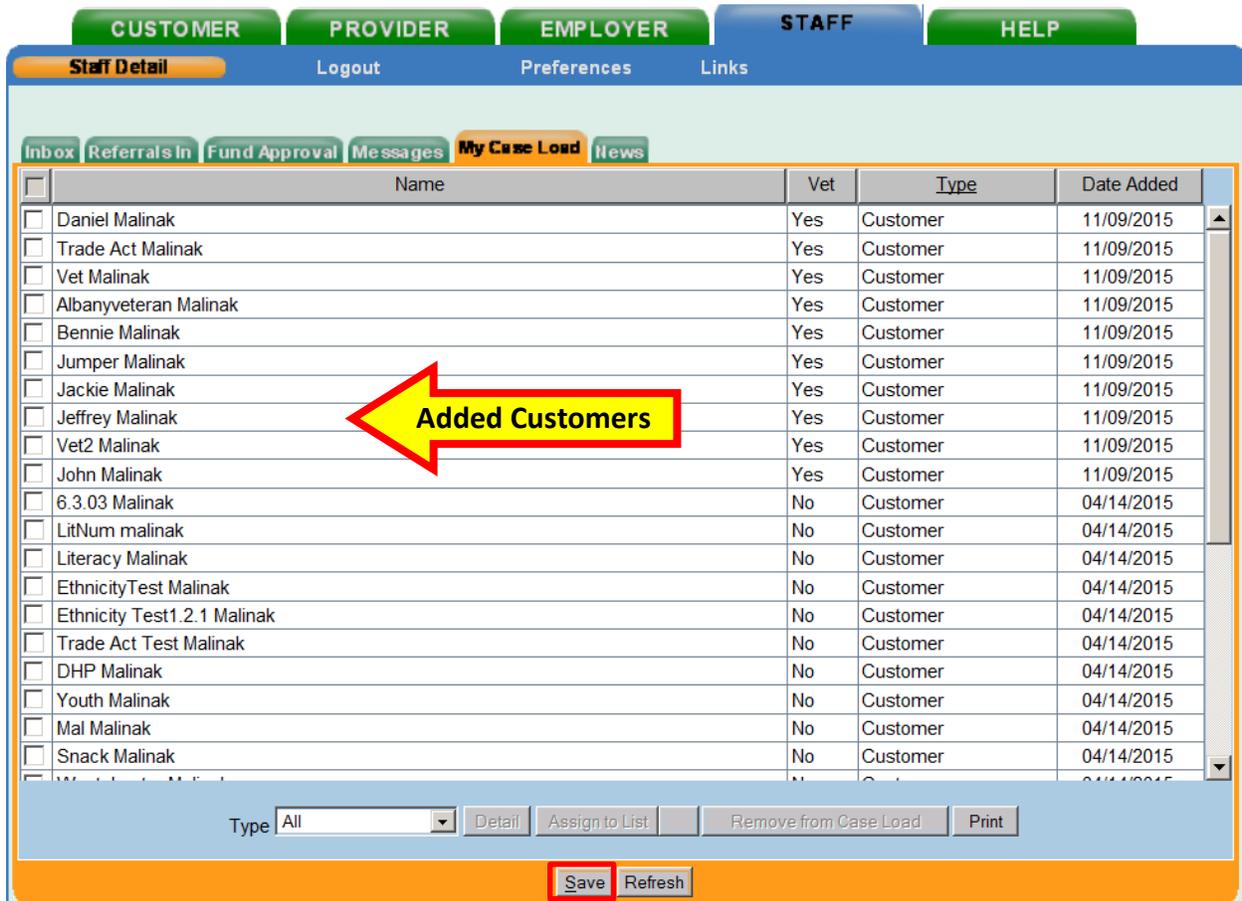
A yellow arrow points to a "Record Saved" message in the top right corner. A red box highlights the "Remove from Case Load" button.

The added records will not be visible in the **My Case Load** tab until the **Refresh** button is clicked.



Once the **Refresh** button is clicked, the added customer's name(s) will be visible.

Click the **Save** button when finished.



The screenshot shows the OSOS interface with the 'STAFF' tab selected. The 'My Case Load' sub-tab is active, displaying a table of customer records. A yellow arrow points to the first few rows of the table, which are labeled 'Added Customers'.

<input type="checkbox"/>	Name	Vet	Type	Date Added
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Literacy Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	EthnicityTest Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	DHP Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Snack Malinak	No	Customer	04/14/2015

At the bottom of the interface, there is a 'Type' dropdown menu set to 'All', and buttons for 'Detail', 'Assign to List', 'Remove from Case Load', and 'Print'. Below these are the 'Save' and 'Refresh' buttons, with 'Save' highlighted by a red box.



## ADDING MULTIPLE CUSTOMERS TO MY CASE LOAD

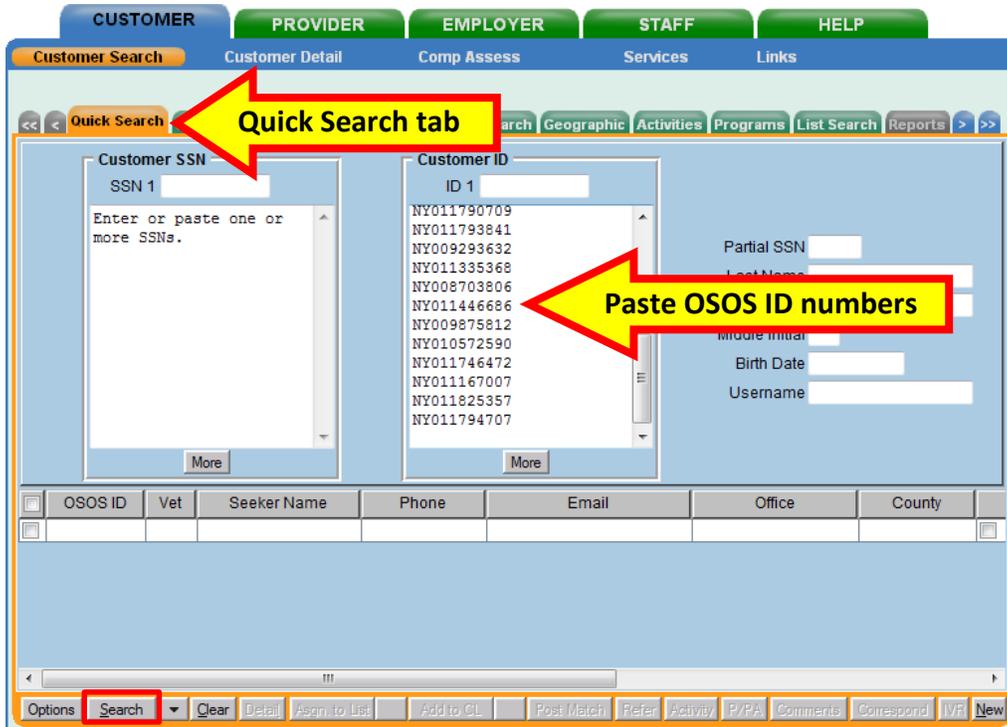
Multiple customers can be added to a case load at one time. For example, a group of customers can be added from a list or spreadsheet containing Social Security or OSOS ID numbers.

A maximum of 200 customers can be pasted and searched in OSOS at one time. If the list is larger than 200, divide it into multiple groups and add each group separately.

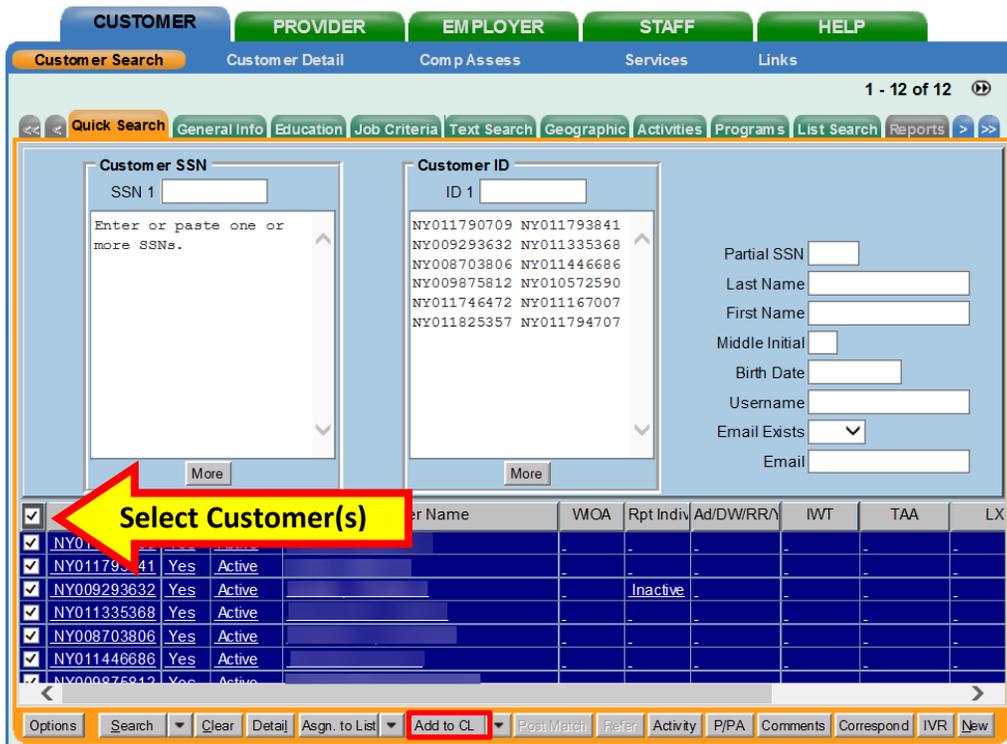
Region	WIB	Office	OSOS ID	Last Name	First Name	Last LVER Referral Date
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY013062097	ALLEN	ALFA	8/5/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY013062099	BROWN	BRAVO	3/4/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011815917	CHARNEY		6/17/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011760437	ELLEN		3/16/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011760794	EVANS		3/2/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011761436	FLORES	FOXTROT	8/24/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011761558	GARCIA	GOLF	6/8/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011769867	HERNANDEZ	HOTEL	6/29/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011775814	JOHNSON	INDIA	5/4/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011776471	JONES	JULIETT	7/14/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011779470	KIM	KILO	7/14/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011785059	LEE	LIMA	4/20/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011785650	MILLER	MIKE	5/1/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011789747	NGUYEN	NOVEMBER	4/15/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011790709	ORTIZ	OSCAR	7/7/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011793841	PATEL	PAPA	3/12/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY009293632	QUICK	QUEBEC	3/26/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011335368	RODRIGUEZ	ROMEO	6/16/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY008703806	URIBE	UNIFORM	7/28/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011446686	VASQUEZ	VICTOR	7/7/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY009875812	WILLIAMS	WHISKEY	2/24/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY010572590	XUONG	X-RAY	5/11/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011746472	YOUNG	YANKEE	7/7/2015
Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011167007	ZIMMER	ZULU	6/2/2015
Capital	Albany/Rensselaer/Schenectady	Rensselaer Co Dept Of Employ & Train	NY011825357	TROY	TANGO	3/13/2015
Capital	Albany/Rensselaer/Schenectady	Schenectady One Stop - E&T	NY011794707	SCHENECTADY	SIERRA	7/27/2015



Copy and paste the OSOS ID or Social Security numbers into OSOS and click the **Search** button.



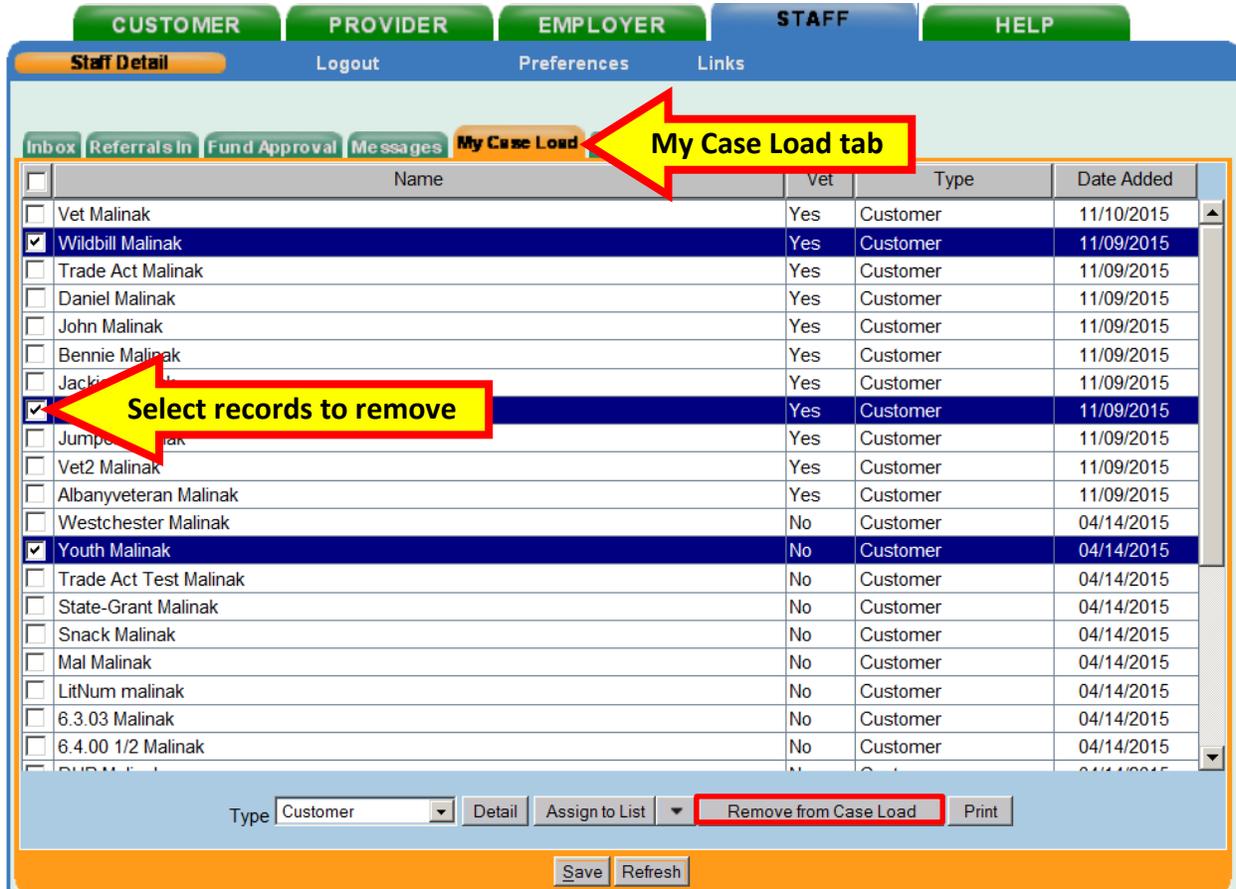
Select the customer(s) to be added to the case load and click the **Add to CL** button.



## REMOVING CUSTOMERS FROM AN EXISTING CASE LOAD

Users may remove records from the case load from the **My Case Load** tab or the **General Info** tab within the **Customer Detail** window.

From the **My Case Load** tab, select the record(s) to be removed and click the **Remove from Case Load** button.



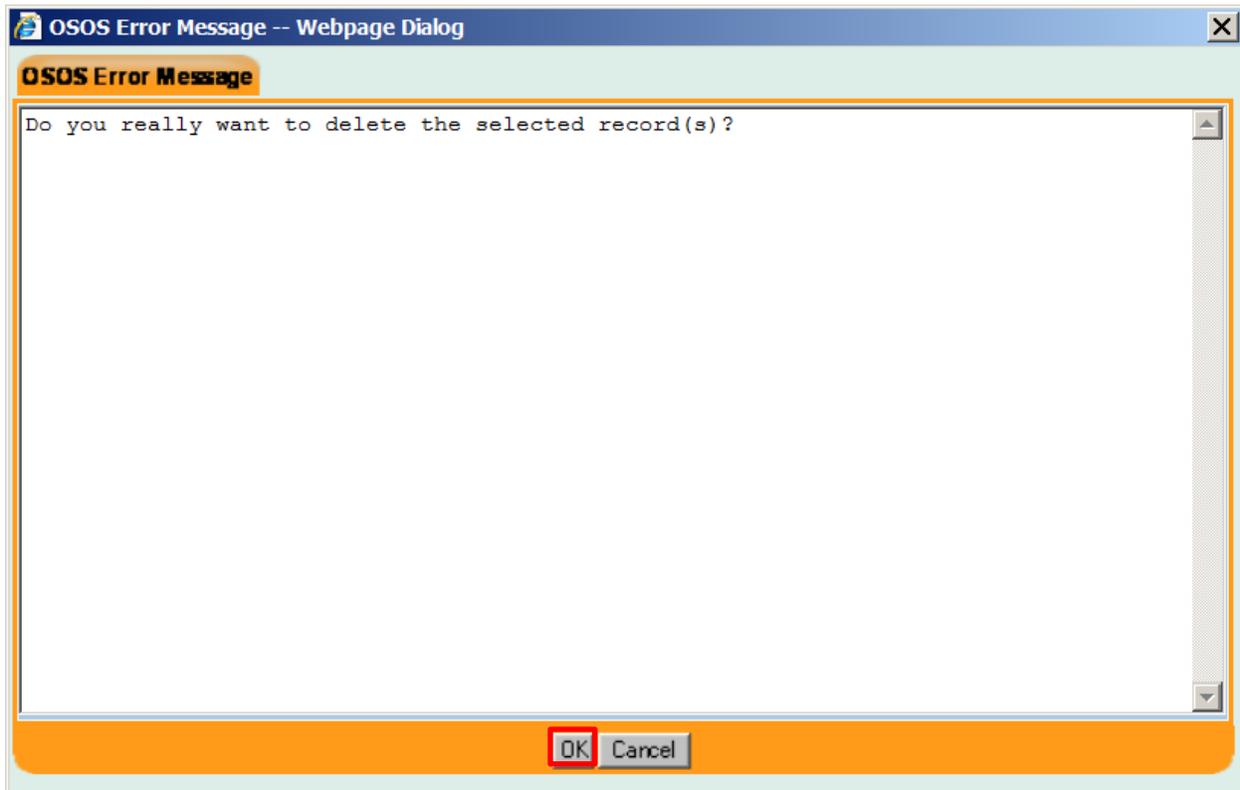
The screenshot shows the OSOS interface with the following elements:

- Navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP
- Sub-navigation: Staff Detail, Logout, Preferences, Links
- Case Load tabs: Inbox, Referrals In, Fund Approval, Messages, **My Case Load** (highlighted with a red arrow and labeled "My Case Load tab")
- Table with columns: Name, Vet, Type, Date Added
- Table rows (selected records are highlighted in blue):
 

Name	Vet	Type	Date Added
Vet Malinak	Yes	Customer	11/10/2015
<input checked="" type="checkbox"/> Wildbill Malinak	Yes	Customer	11/09/2015
Trade Act Malinak	Yes	Customer	11/09/2015
Daniel Malinak	Yes	Customer	11/09/2015
John Malinak	Yes	Customer	11/09/2015
Bennie Malinak	Yes	Customer	11/09/2015
Jackie Malinak	Yes	Customer	11/09/2015
<input checked="" type="checkbox"/> Jump Malinak	Yes	Customer	11/09/2015
Vet2 Malinak	Yes	Customer	11/09/2015
Albanyveteran Malinak	Yes	Customer	11/09/2015
Westchester Malinak	No	Customer	04/14/2015
<input checked="" type="checkbox"/> Youth Malinak	No	Customer	04/14/2015
Trade Act Test Malinak	No	Customer	04/14/2015
State-Grant Malinak	No	Customer	04/14/2015
Snack Malinak	No	Customer	04/14/2015
Mal Malinak	No	Customer	04/14/2015
LitNum malinak	No	Customer	04/14/2015
6.3.03 Malinak	No	Customer	04/14/2015
6.4.00 1/2 Malinak	No	Customer	04/14/2015
- Bottom controls: Type (Customer), Detail, Assign to List, **Remove from Case Load** (highlighted), Print, Save, Refresh

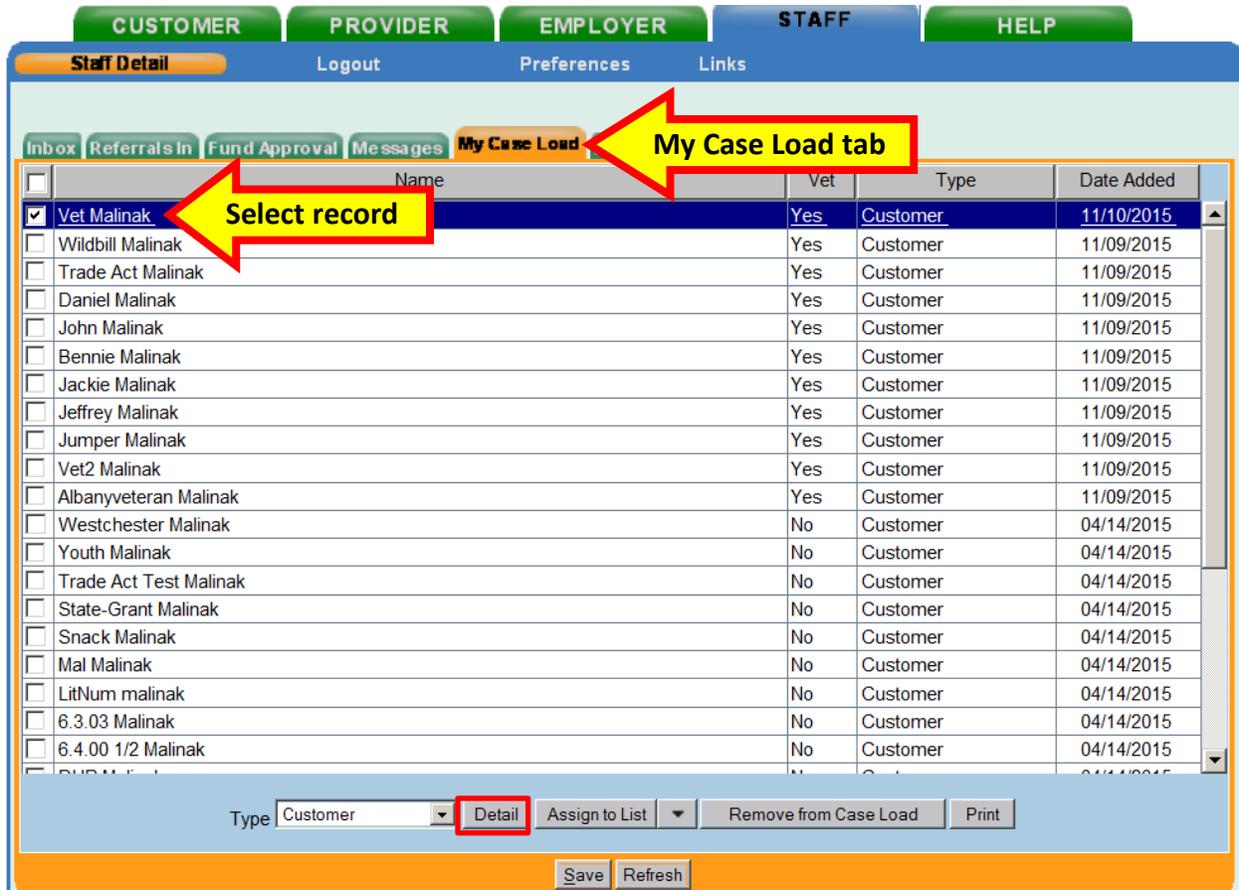
The **OSOS Error Message - - Webpage Dialog** box will appear requesting confirmation to remove the selected record(s) from the case load.

If the record is to be removed, click the **OK** button.



Click the **Save** button when finished.

Select any customer or business contact and click the **Detail** button to navigate to the customer's or business' **General Info** tab.

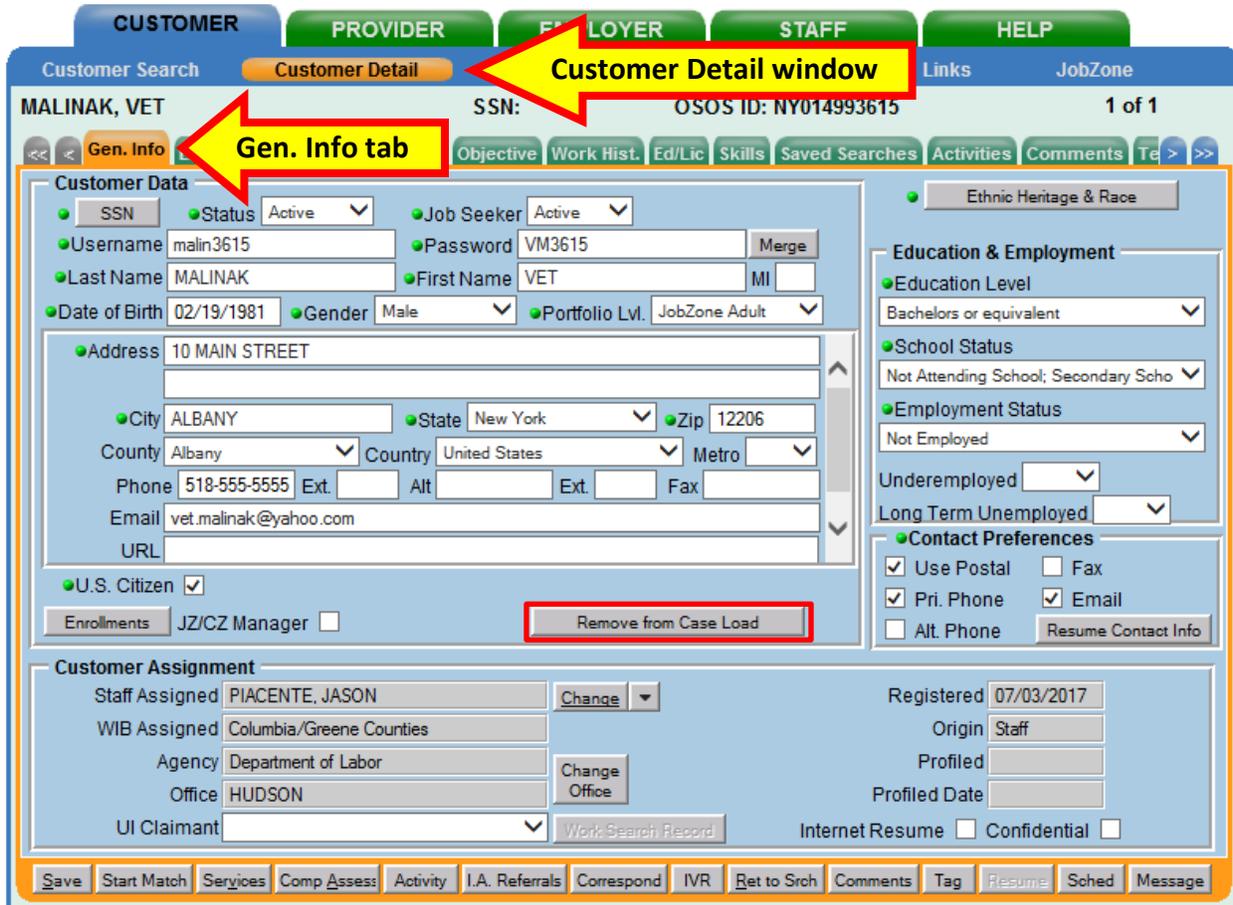


The screenshot shows the OSOS interface for a staff member's case load. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Staff Detail, Logout, Preferences, and Links. The main content area has a sub-menu with options: Inbox, Referrals In, Fund Approval, Messages, and My Case Load. The 'My Case Load' tab is selected and highlighted with a red arrow labeled 'My Case Load tab'. Below this is a table with columns: Name, Vet, Type, and Date Added. The first row, 'Vet Malinak', is selected with a checkmark and highlighted with a red arrow labeled 'Select record'. The table contains 20 rows of customer records. At the bottom of the table, there is a 'Type' dropdown menu set to 'Customer', a 'Detail' button (highlighted with a red box), an 'Assign to List' dropdown, a 'Remove from Case Load' button, and a 'Print' button. Below the table are 'Save' and 'Refresh' buttons.

Name	Vet	Type	Date Added
<input checked="" type="checkbox"/> Vet Malinak	Yes	Customer	11/10/2015
<input type="checkbox"/> Wildbill Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/> Westchester Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/> State-Grant Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Snack Malinak	No	Customer	04/14/2015
<input type="checkbox"/> Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/> LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/> 6.4.00 1/2 Malinak	No	Customer	04/14/2015

The **General Info** tab within the **Customer Detail** window has the **Remove from Case Load** button in the middle of the screen. To quickly remove a record from the case load, click the **Remove from Case Load** button.

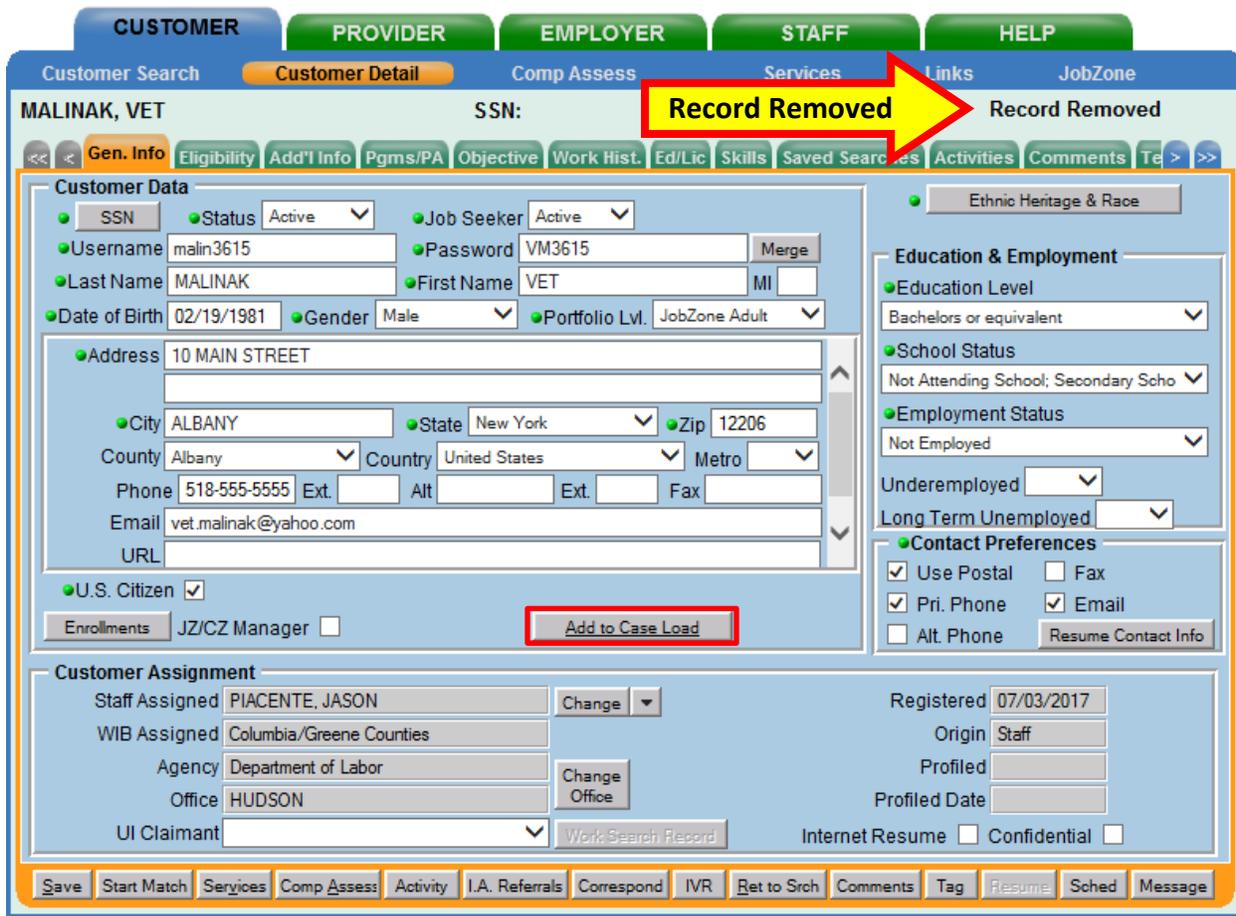
If the customer is not included in the case load, then the button displays as **Add to Case Load**.



Once the customer has been removed from the case load, the message “Record Removed” will appear in the top right hand corner and the **Remove from Case Load** button will be replaced with the **Add to Case Load** button.

The availability of the **Add to Case Load** button confirms that the customer has been removed from the case load.

There is no need to save the record.



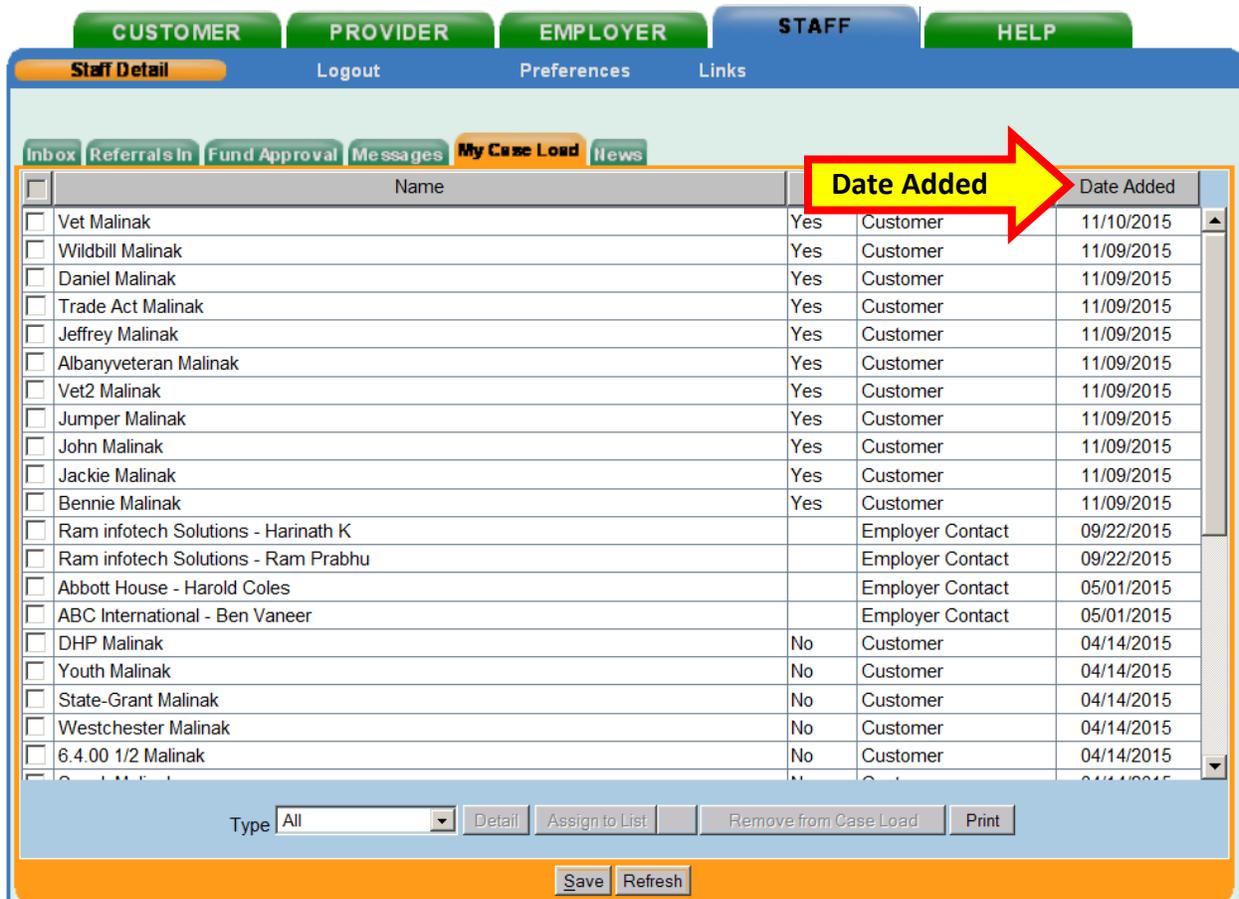
The screenshot displays the OSOS Customer Detail page for a customer named MALINAK, VET. The page is divided into several sections:

- Customer Data:** Includes fields for SSN, Status (Active), Job Seeker (Active), Username (malin3615), Password (VM3615), Last Name (MALINAK), First Name (VET), Date of Birth (02/19/1981), Gender (Male), Portfolio Lvl. (JobZone Adult), Address (10 MAIN STREET), City (ALBANY), State (New York), Zip (12206), County (Albany), Country (United States), Metro, Phone (518-555-5555), Email (vet.malinak@yahoo.com), and U.S. Citizen (checked).
- Enrollments:** Shows JZ/CZ Manager with an unchecked checkbox and an **Add to Case Load** button highlighted in a red box.
- Customer Assignment:** Shows Staff Assigned (PIACENTE, JASON), WIB Assigned (Columbia/Greene Counties), Agency (Department of Labor), Office (HUDSON), and UI Claimant.
- Education & Employment:** Includes Education Level (Bachelors or equivalent), School Status (Not Attending School; Secondary Scho), Employment Status (Not Employed), Underemployed, and Long Term Unemployed.
- Contact Preferences:** Includes checkboxes for Use Postal, Fax, Pri. Phone, Email, and Alt. Phone, along with a Resume Contact Info button.

A yellow arrow points to the "Record Removed" message in the top right corner of the page. The "Add to Case Load" button is highlighted with a red box.

## SORTING MY CASE LOAD

The **My Case Load** tab is automatically sorted by the **Date Added** column.

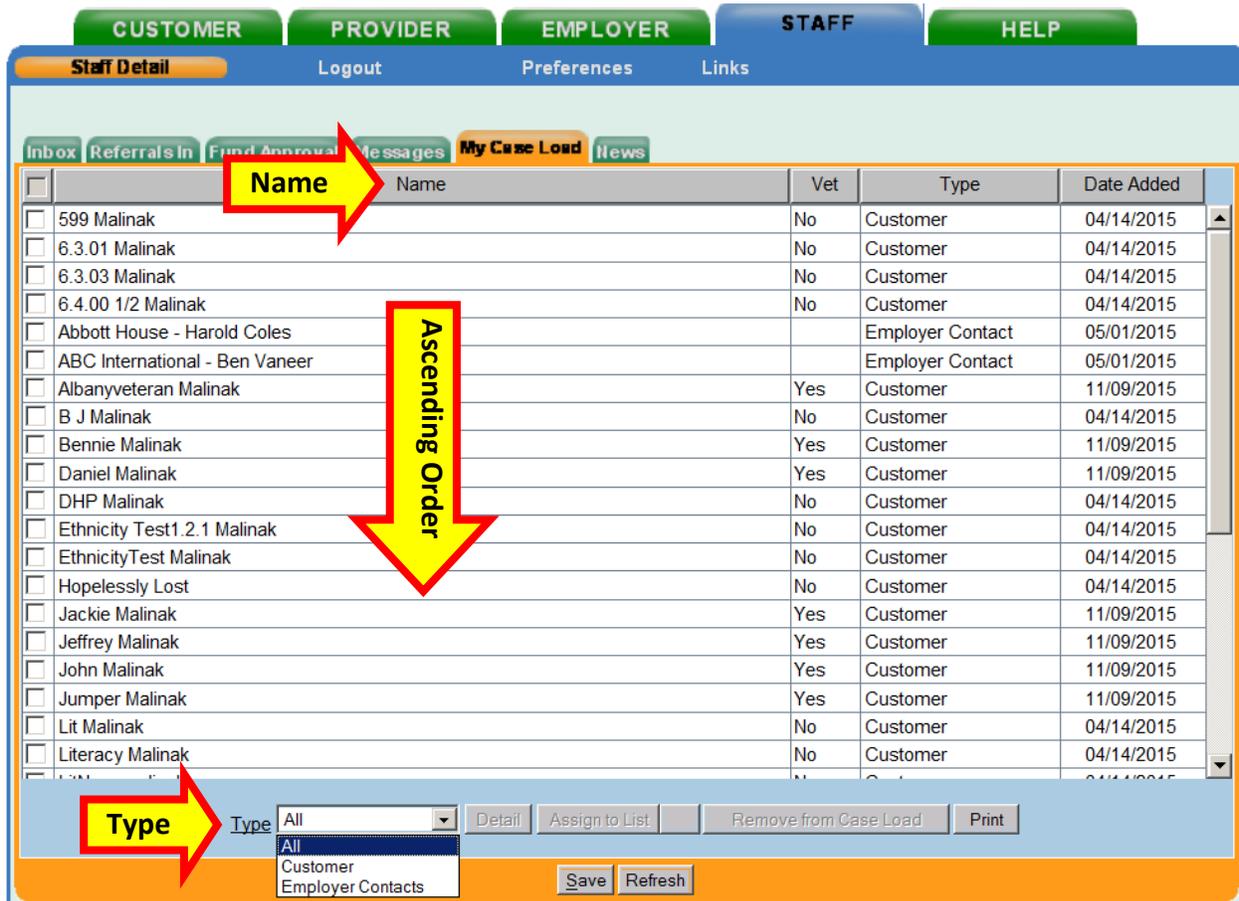


The screenshot shows the OSOS interface with the 'STAFF' tab selected. The 'My Case Load' sub-tab is active, displaying a list of cases. A yellow arrow points to the 'Date Added' column header, indicating that the list is sorted by this column. The cases are listed in descending order of date added.

<input type="checkbox"/>	Name			Date Added	
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/10/2015	▲
<input type="checkbox"/>	Wildbill Malinak	Yes	Customer	11/09/2015	
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015	
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015	
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015	
<input type="checkbox"/>	Albanyveteran Malinak	Yes	Customer	11/09/2015	
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015	
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015	
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015	
<input type="checkbox"/>	Jackie Malinak	Yes	Customer	11/09/2015	
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015	
<input type="checkbox"/>	Ram infotech Solutions - Harinath K		Employer Contact	09/22/2015	
<input type="checkbox"/>	Ram infotech Solutions - Ram Prabhu		Employer Contact	09/22/2015	
<input type="checkbox"/>	Abbott House - Harold Coles		Employer Contact	05/01/2015	
<input type="checkbox"/>	ABC International - Ben Vaneer		Employer Contact	05/01/2015	
<input type="checkbox"/>	DHP Malinak	No	Customer	04/14/2015	
<input type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015	
<input type="checkbox"/>	State-Grant Malinak	No	Customer	04/14/2015	
<input type="checkbox"/>	Westchester Malinak	No	Customer	04/14/2015	
<input type="checkbox"/>	6.4.00 1/2 Malinak	No	Customer	04/14/2015	

At the bottom of the interface, there is a 'Type' dropdown menu set to 'All', and buttons for 'Detail', 'Assign to List', 'Remove from Case Load', and 'Print'. At the very bottom, there are 'Save' and 'Refresh' buttons.

The information can be sorted by the headings listed. Clicking on any column header will sort the information. In the example below, the **Name** column was clicked and the information was sorted by the first name in ascending order. Because **All** was selected as the **Type**, the example displays both customers and business contacts.

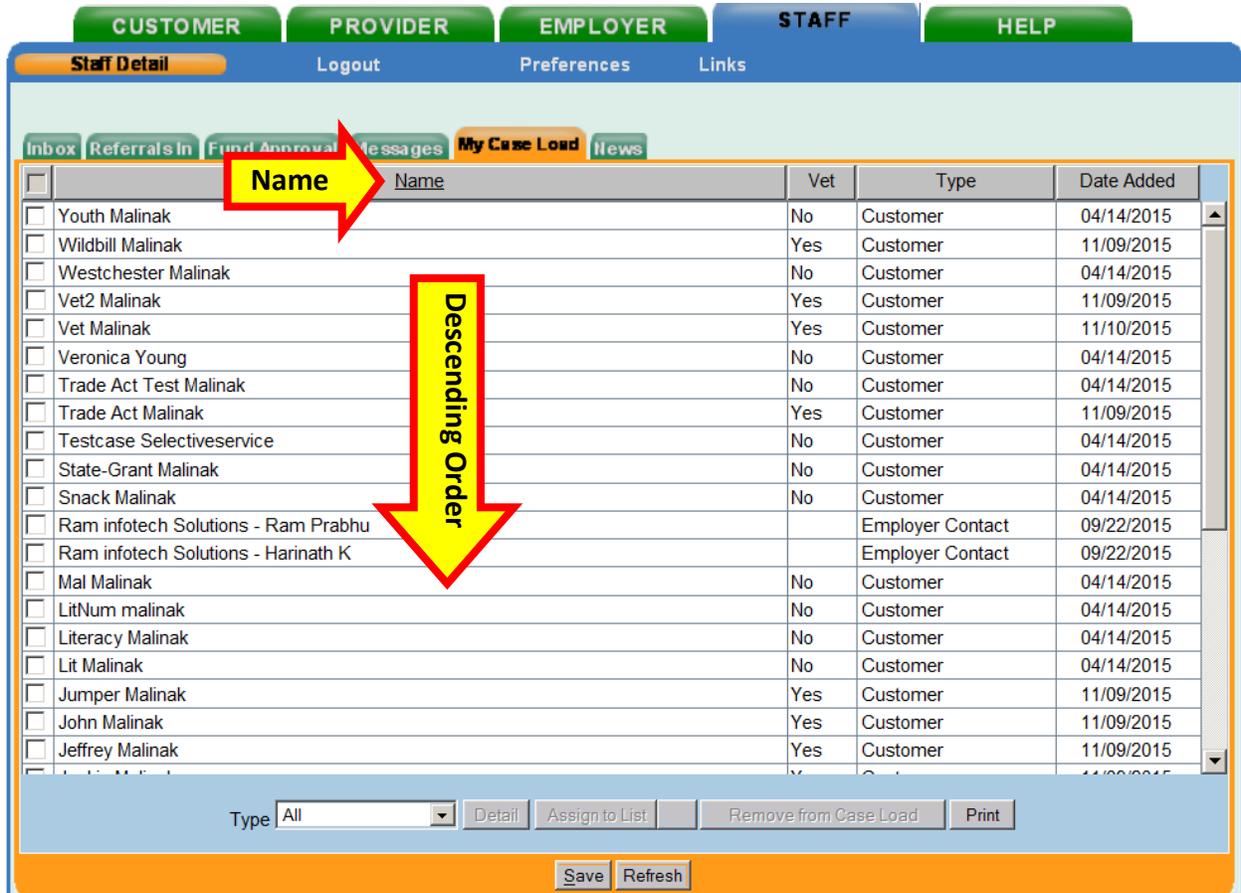


The screenshot shows the 'My Case Load' tab in the OSOS interface. The table below lists staff members, sorted by name in ascending order. The 'Type' dropdown menu is open, showing 'All' selected.

<input type="checkbox"/>	Name	Vet	Type	Date Added
<input type="checkbox"/>	599 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	6.3.01 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	6.4.00 1/2 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Abbott House - Harold Coles		Employer Contact	05/01/2015
<input type="checkbox"/>	ABC International - Ben Vaneer		Employer Contact	05/01/2015
<input type="checkbox"/>	Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	B J Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	DHP Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	EthnicityTest Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Hopelessly Lost	No	Customer	04/14/2015
<input type="checkbox"/>	Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Lit Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Literacy Malinak	No	Customer	04/14/2015

At the bottom of the interface, the 'Type' dropdown menu is open, showing the following options: All, Customer, and Employer Contacts. The 'All' option is selected. Other buttons visible include 'Detail', 'Assign to List', 'Remove from Case Load', 'Print', 'Save', and 'Refresh'.

Clicking the **Name** column a second time will reverse the sorting so that it appears in descending order.



The screenshot shows the 'Staff Detail' page in the OSOS application. The page has a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with options like Staff Detail, Logout, Preferences, and Links. A secondary bar contains tabs for Inbox, Referrals In, Fund Approval, Messages, My Case Load, and News. The main content is a table with the following columns: Name, Vet, Type, and Date Added. The table is sorted by Name in descending order, as indicated by a yellow arrow pointing down with the text 'Descending Order'. A red arrow points to the 'Name' column header.

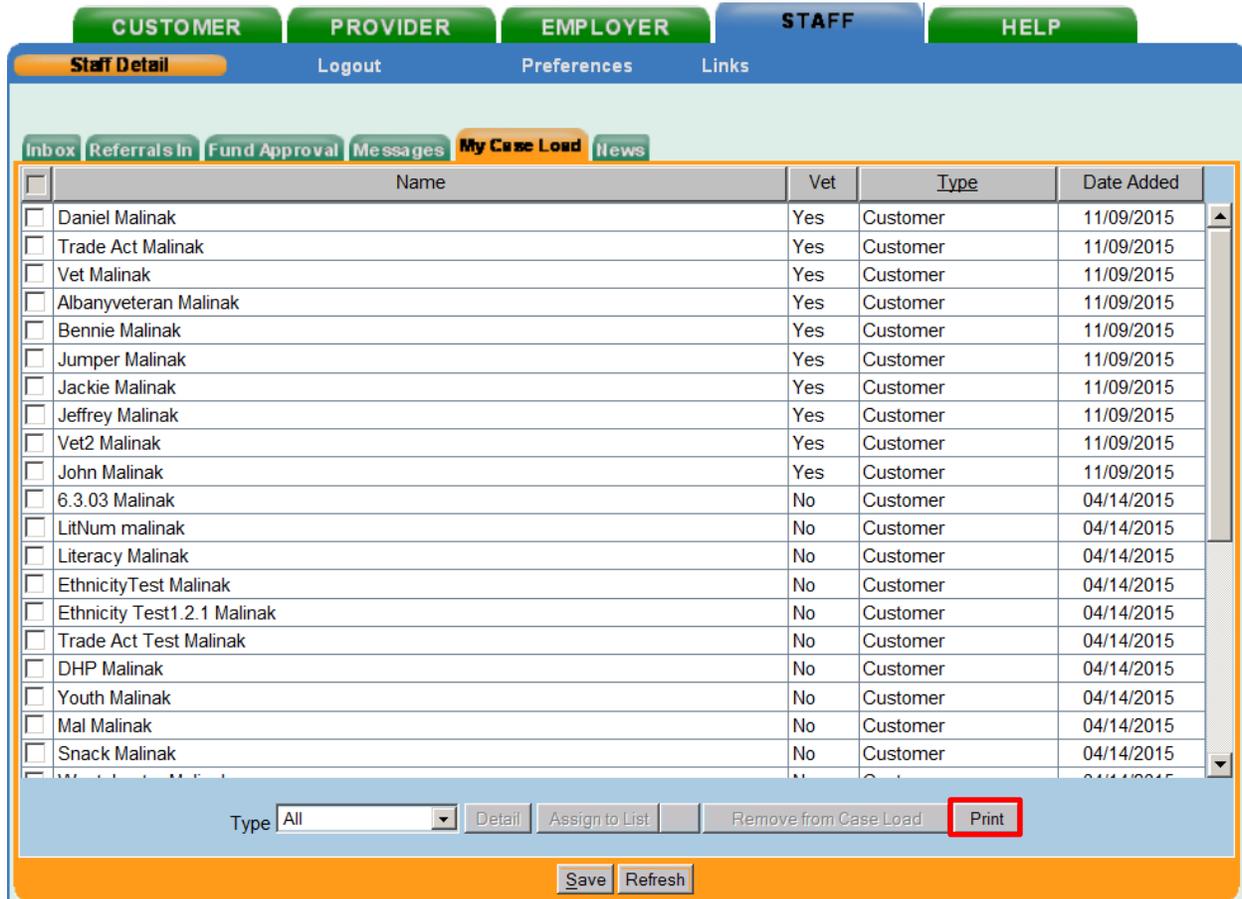
<input type="checkbox"/>	Name	Vet	Type	Date Added
<input type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Wildbill Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Westchester Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/10/2015
<input type="checkbox"/>	Veronica Young	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Testcase Selectiveservice	No	Customer	04/14/2015
<input type="checkbox"/>	State-Grant Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Snack Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Ram infotech Solutions - Ram Prabhu		Employer Contact	09/22/2015
<input type="checkbox"/>	Ram infotech Solutions - Harinath K		Employer Contact	09/22/2015
<input type="checkbox"/>	Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Literacy Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Lit Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015

At the bottom of the table, there is a 'Type' dropdown menu set to 'All', and buttons for 'Detail', 'Assign to List', 'Remove from Case Load', and 'Print'. Below the table are 'Save' and 'Refresh' buttons.

## PRINTING AND EXPORTING MY CASE LOAD LIST

From the **My Case Load** tab, click the **Print** button to either print or export the case load.

Only the four visible columns from **My Case Load** will print or export to the Excel spreadsheet.

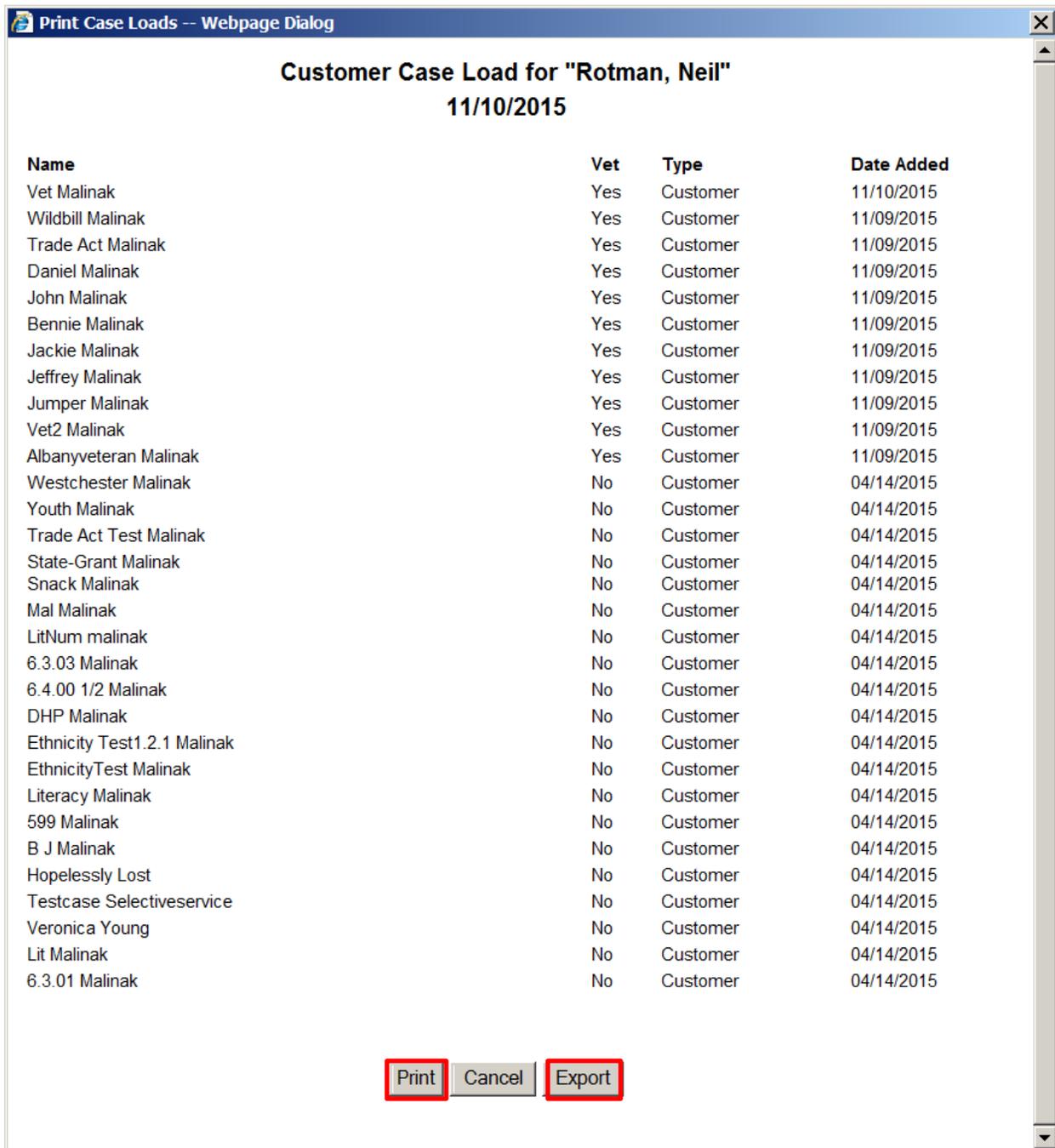


The screenshot shows the OSOS interface with the 'My Case Load' tab selected. The interface includes navigation tabs (CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP) and a sub-menu (Inbox, Referrals In, Fund Approval, Messages, My Case Load, News). The main content area displays a table with the following columns: Name, Vet, Type, and Date Added. The table lists various cases for Daniel Malinak, including 'Trade Act Malinak', 'Vet Malinak', 'Albanyveteran Malinak', 'Bennie Malinak', 'Jumper Malinak', 'Jackie Malinak', 'Jeffrey Malinak', 'Vet2 Malinak', 'John Malinak', '6.3.03 Malinak', 'LitNum malinak', 'Literacy Malinak', 'EthnicityTest Malinak', 'Ethnicity Test1.2.1 Malinak', 'Trade Act Test Malinak', 'DHP Malinak', 'Youth Malinak', 'Mal Malinak', and 'Snack Malinak'. At the bottom of the table, there is a 'Type' dropdown menu set to 'All', and buttons for 'Detail', 'Assign to List', 'Remove from Case Load', and 'Print' (highlighted in red). Below the table are 'Save' and 'Refresh' buttons.

<input type="checkbox"/>	Name	Vet	Type	Date Added
<input type="checkbox"/>	Daniel Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Trade Act Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Albanyveteran Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Bennie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jumper Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jackie Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Jeffrey Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	Vet2 Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	John Malinak	Yes	Customer	11/09/2015
<input type="checkbox"/>	6.3.03 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	LitNum malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Literacy Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	EthnicityTest Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Trade Act Test Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	DHP Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Youth Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Mal Malinak	No	Customer	04/14/2015
<input type="checkbox"/>	Snack Malinak	No	Customer	04/14/2015

To print, click the **Print** button.

To export, click the **Export** button.



**Print Case Loads -- Webpage Dialog**

**Customer Case Load for "Rotman, Neil"**  
11/10/2015

Name	Vet	Type	Date Added
Vet Malinak	Yes	Customer	11/10/2015
Wildbill Malinak	Yes	Customer	11/09/2015
Trade Act Malinak	Yes	Customer	11/09/2015
Daniel Malinak	Yes	Customer	11/09/2015
John Malinak	Yes	Customer	11/09/2015
Bennie Malinak	Yes	Customer	11/09/2015
Jackie Malinak	Yes	Customer	11/09/2015
Jeffrey Malinak	Yes	Customer	11/09/2015
Jumper Malinak	Yes	Customer	11/09/2015
Vet2 Malinak	Yes	Customer	11/09/2015
Albanyveteran Malinak	Yes	Customer	11/09/2015
Westchester Malinak	No	Customer	04/14/2015
Youth Malinak	No	Customer	04/14/2015
Trade Act Test Malinak	No	Customer	04/14/2015
State-Grant Malinak	No	Customer	04/14/2015
Snack Malinak	No	Customer	04/14/2015
Mal Malinak	No	Customer	04/14/2015
LitNum malinak	No	Customer	04/14/2015
6.3.03 Malinak	No	Customer	04/14/2015
6.4.00 1/2 Malinak	No	Customer	04/14/2015
DHP Malinak	No	Customer	04/14/2015
Ethnicity Test1.2.1 Malinak	No	Customer	04/14/2015
EthnicityTest Malinak	No	Customer	04/14/2015
Literacy Malinak	No	Customer	04/14/2015
599 Malinak	No	Customer	04/14/2015
B J Malinak	No	Customer	04/14/2015
Hopelessly Lost	No	Customer	04/14/2015
Testcase Selectiveservice	No	Customer	04/14/2015
Veronica Young	No	Customer	04/14/2015
Lit Malinak	No	Customer	04/14/2015
6.3.01 Malinak	No	Customer	04/14/2015

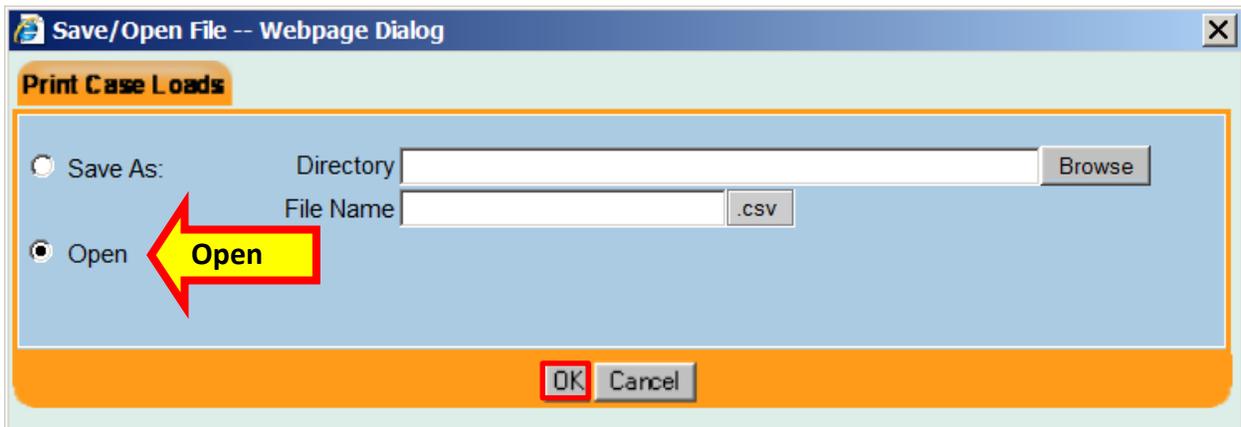
**Print** **Cancel** **Export**

When printing, the **Print** pop-up will appear. Select the desired options and click the **Print** button.

The **Export** button will navigate the user to the **Save/Open File -- Webpage Dialog** box. When exporting, there are two options:

1. Save As
2. Open

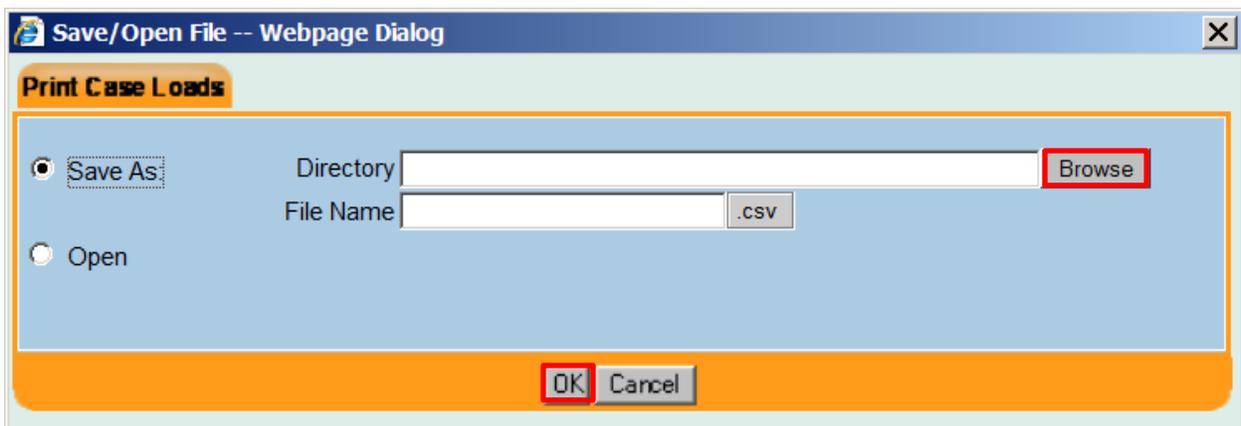
Selecting **Open** and clicking the **OK** button will immediately open the case load in an Excel spreadsheet. Once the Excel spreadsheet is open, it may be saved to the desktop or any preferred folder.



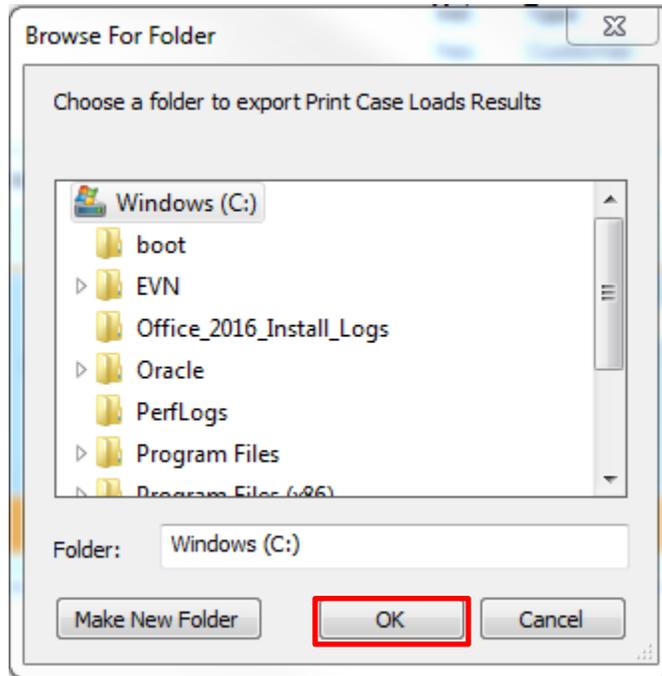
Selecting **Save As** requires the entry of a **Directory** and **File Name**.

If the **Directory** is known, it may be keyed into the data field.

If the **Directory** is unknown, click the **Browse** button:

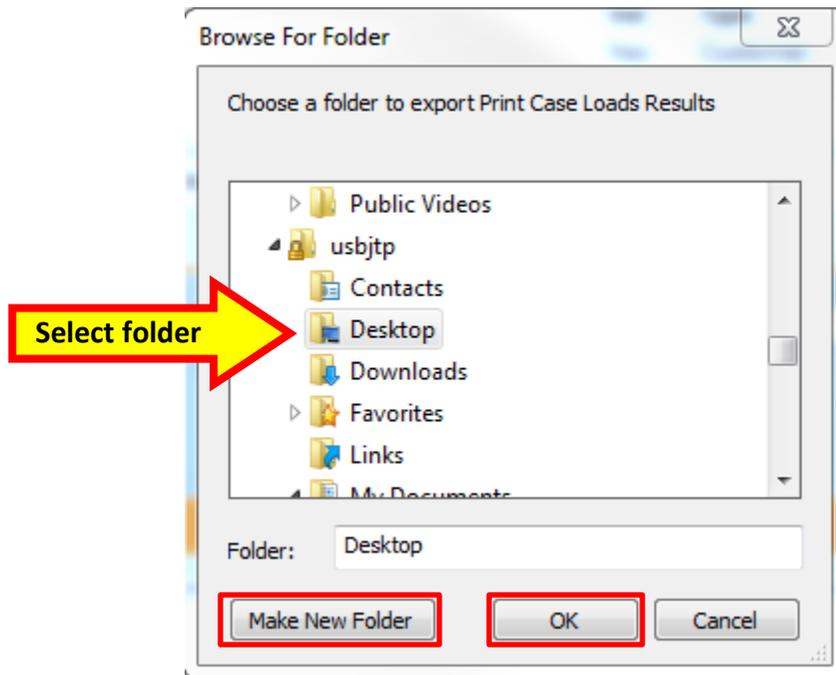


The **Browse For Folder** pop-up will appear

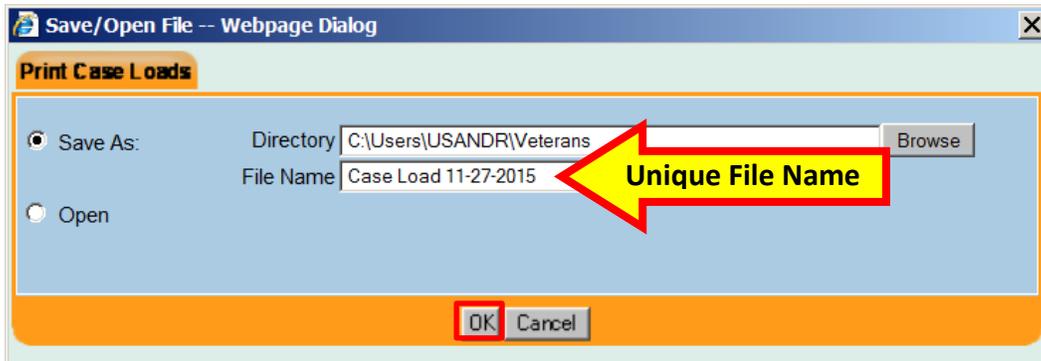


Scroll through the folders and select the preferred folder or create a new folder.

Click the **OK** button.

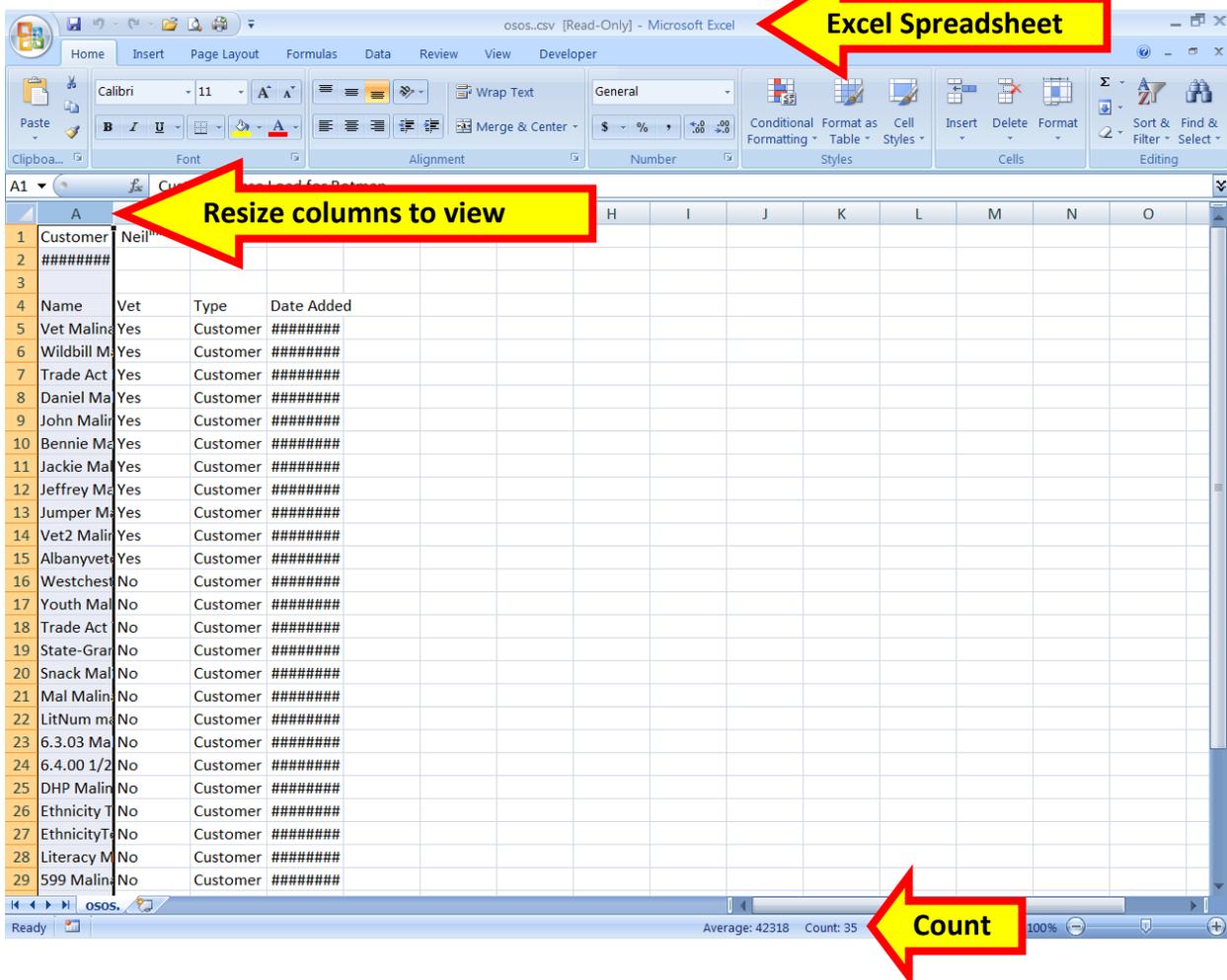


Enter a unique name for the file and click the **OK** button:



After clicking the **OK** button, the file will not automatically open. It is necessary to open Excel and select the spreadsheet from the folder.

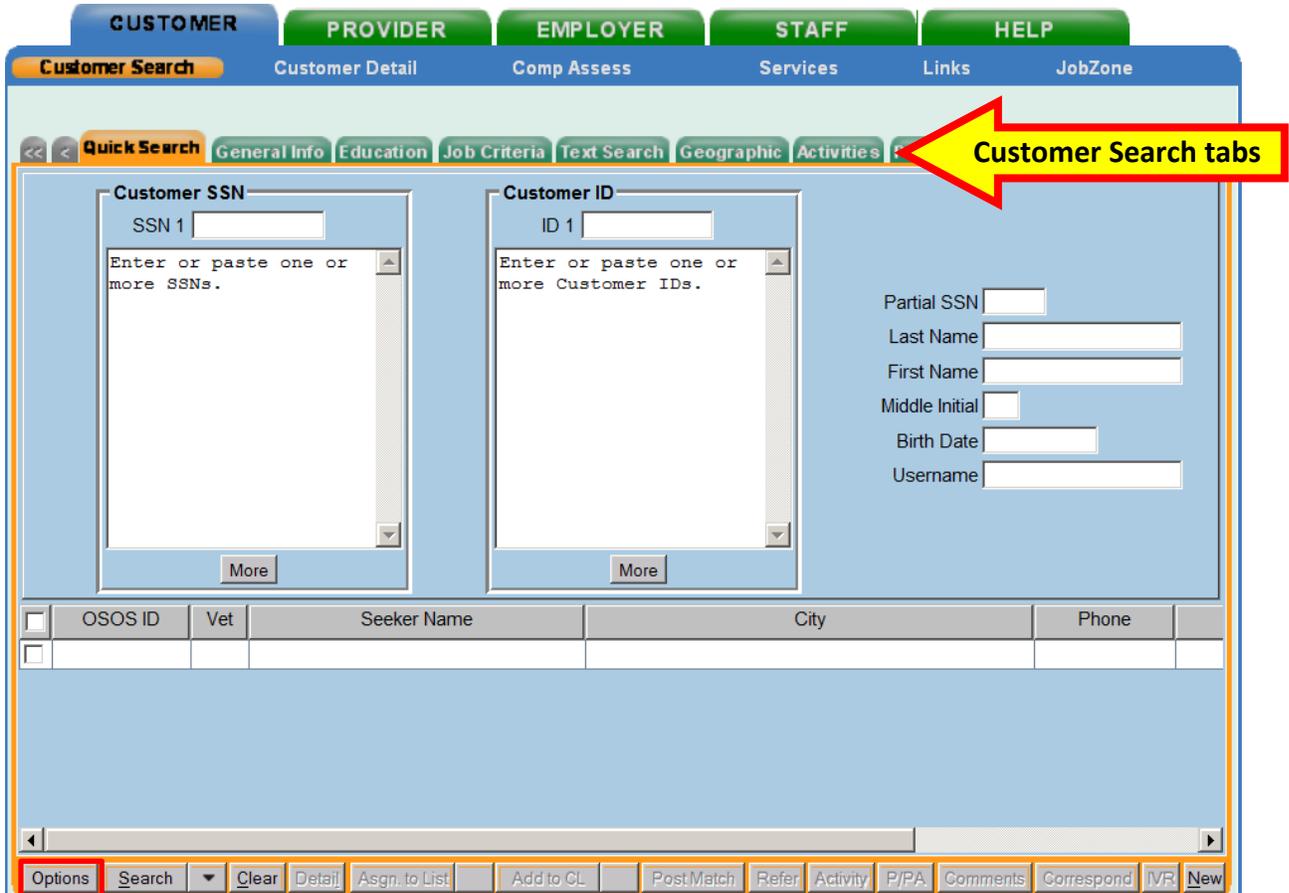
The columns will need to be resized to view the data. The **Count** at the bottom of the spreadsheet provides the number of individuals in the case load.



## CUSTOMIZING THE EXPORTED MY CASE LOAD EXCEL FILE

If additional information is desired, such as the city where the customer resides, telephone number, or email address, run a search and include **My Case Load** in the **Customer Search** criteria.

To begin searching for specific customers, first click the **Options** button at the bottom of any **Customer Search** tab to access the **Customer Search Result Columns - - Webpage Dialog** box.



**Customer Search** Customer Detail Comp Assess Services Links JobZone

Quick Search General Info Education Job Criteria Text Search Geographic Activities **Customer Search tabs**

Customer SSN  
SSN 1   
Enter or paste one or more SSNs.

Customer ID  
ID 1   
Enter or paste one or more Customer IDs.

Partial SSN   
Last Name   
First Name   
Middle Initial   
Birth Date   
Username

<input type="checkbox"/>	OSOS ID	Vet	Seeker Name	City	Phone
<input type="checkbox"/>					

Options Search Clear Detail Asgn. to List Add to CL Post/Match Refer Activity P/PA Comments Correspond IVR New



Select the information for the spreadsheet by checking the box next to the desired data.

Select a number to designate the order in which the information should appear.

These preferences may be saved for future searches by checking the box next to **Set as My Defaults** and clicking the **Save** button.

As the information and order are selected, it will appear in the column header.

The screenshot shows the 'Customer Search Result Columns' dialog box with various sections and options. Annotations include:

- Select Information:** A yellow arrow pointing to the 'Status' checkbox in the 'Contact Information' section.
- Sort Order number:** A yellow arrow pointing to the dropdown menu next to the 'Phone' checkbox in the 'Contact Information' section.
- Column Header:** A yellow arrow pointing to the 'City' column header in the preview table at the bottom.
- Set as My Defaults:** A yellow arrow pointing to the 'Set as My Defaults' checkbox in the bottom right corner.

The dialog box contains the following sections and options:

- Customer Identification--**
  - OSOS ID (Order: 1)
  - SSN
  - Username
  - Seeker Name (Order: 3)
  - Last Name
  - First Name
  - MI
  - Vet (Order: 2)
  - SSN Not Provided
  - Status (Order: 7)
  - Job Seeker
  - Gender
  - Date of Birth
- Program Enrollments--**
  - Pgm CMSA
  - Pgm CMSS
  - Pgm WIA
  - Pgm WSIO
  - Pgm TAA
  - Pgm LX
  - Pgm SSY
  - Pgm SSP
- Contact Information--**
  - Address 1
  - Address 2
  - City (Order: 4)
  - State
  - ZIP Code
  - County
  - Country
  - Metro
  - Phone (Order: 5)
  - Ext.
  - Alt. Phone
  - Alt. Ext.
  - Fax
  - Email (Order: 6)
  - URL
  - Alt URL
  - Third URL
- Contact Preferences--**
  - Use Postal
  - Pri. Phone
  - Alt. Phone
  - Fax
  - Email
- Citizenship--**
  - U.S. Citizen
  - Alien Reg #
  - Permanent
- Education / Employment--**
  - Expires
  - Education Level
  - School Status
  - Employment Status
- Customer Assignment--**
  - St. assigned
  - Referred
  - Modify Time
  - Origin
  - Origination Method
  - UI Claimant
  - Profiled
  - Profiled Date
  - Internet Resume
  - Confidential
- Programs--**
  - Lower Living Flag
  - Income 70% LLSIL
  - Local Priority
  - Disability Status
  - Disability Category
  - Migrant / Seas Wkr
  - Migrant Class
  - Empl. in Farmwork
- Military / Selective Service--**
  - Service Veteran
  - Vet Status
  - Veteran Era
  - Service From
  - Thru
  - Current Housing
  - Current Housing (2)
  - Service Disability
  - Campaign Veteran
  - In Country
  - Type
  - Branch
  - Selective Service?
  - Selective Service #
- Employment Preferences--**
  - Work Week
  - Duration
  - Salary
  - Pay Unit
  - Norm. Salary
  - Date Available
  - First Shift
  - Second Shift
- Employment Objective--**
  - Third Shift
  - Split Shift
  - Rotating Shift
  - Empl. Objective
  - Desired Job Title
  - Add'l Skills Text
- Drivers License--**
  - Driver Flag
  - License Class
  - License State
  - Air Brakes
  - School Bus
  - Motorcycle
  - Doubles/Triples
  - Haz. Materials
  - Pass Transport
  - Tank Vehicle
  - Tank Hazard

Preview table:

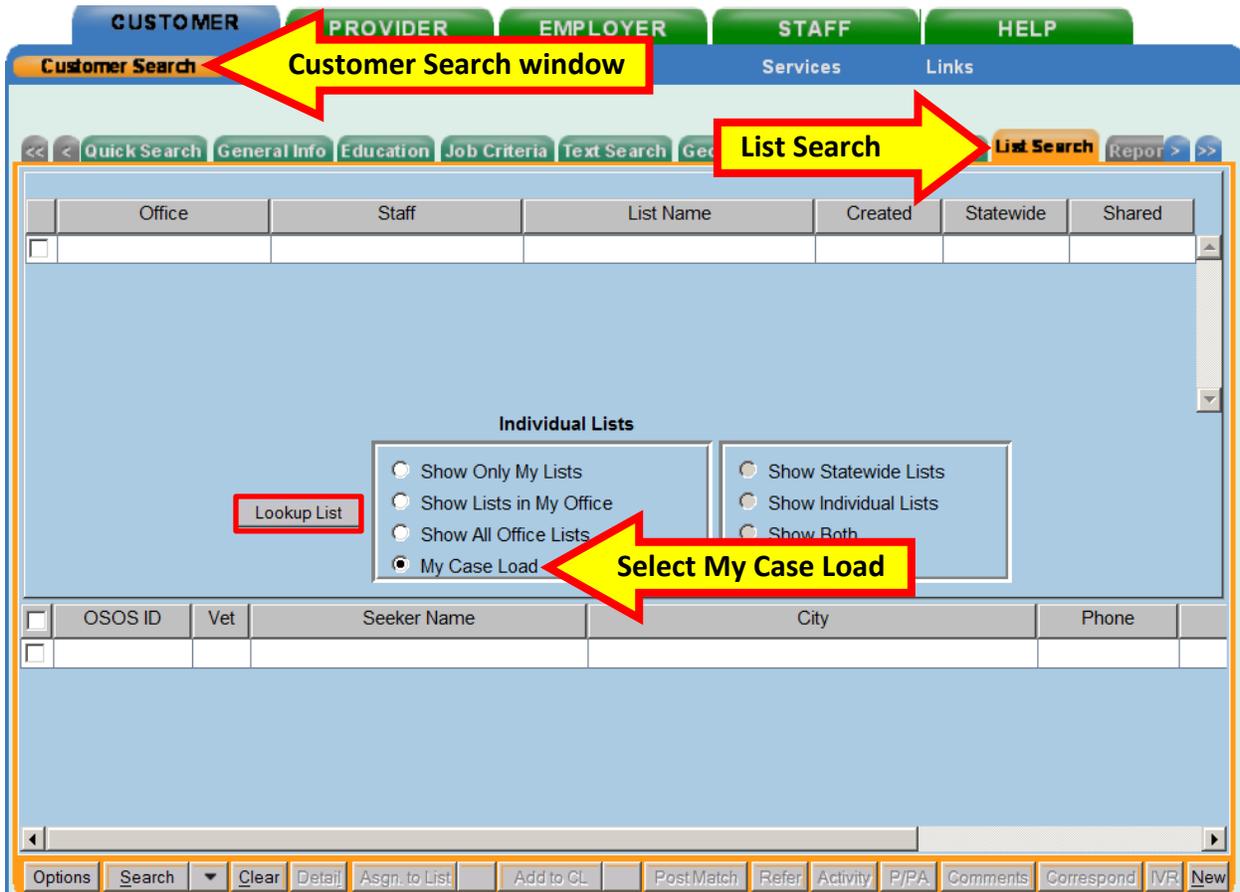
OSOS ID	Vet	Seeker Name	City

Buttons: Set as My Defaults (checked), Save, Cancel, Show My Defaults, Show System Defaults

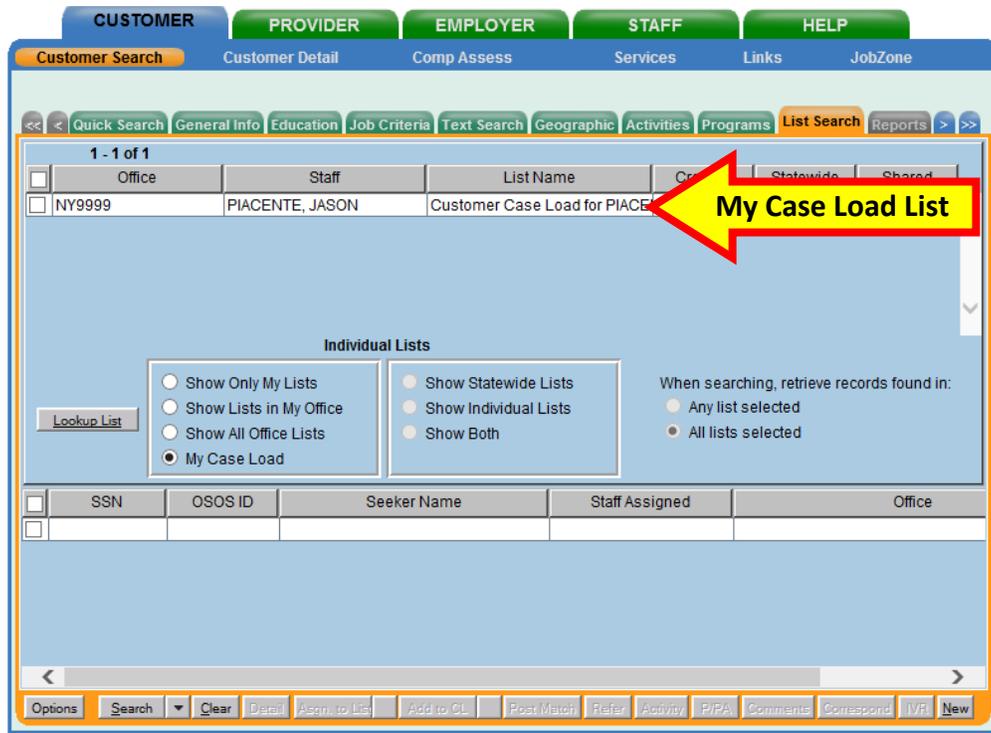
Navigate to the **Customer Search** window and the **List Search** tab.

Select the **My Case Load** option.

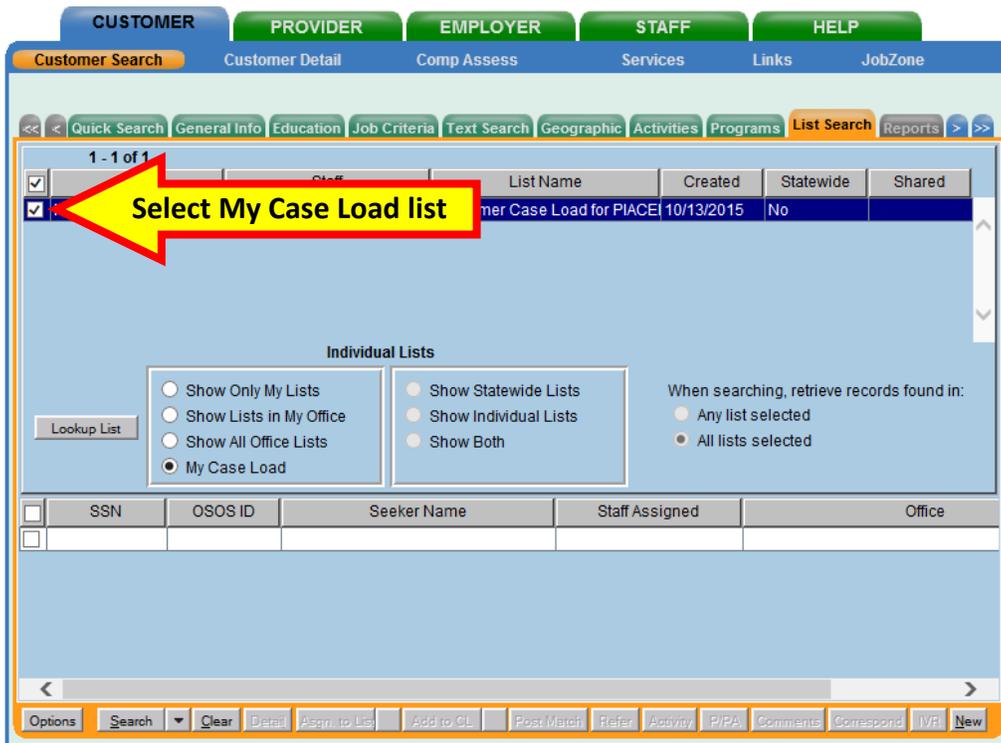
Click the **Lookup List** button.



The user's caseload will appear as the only list.



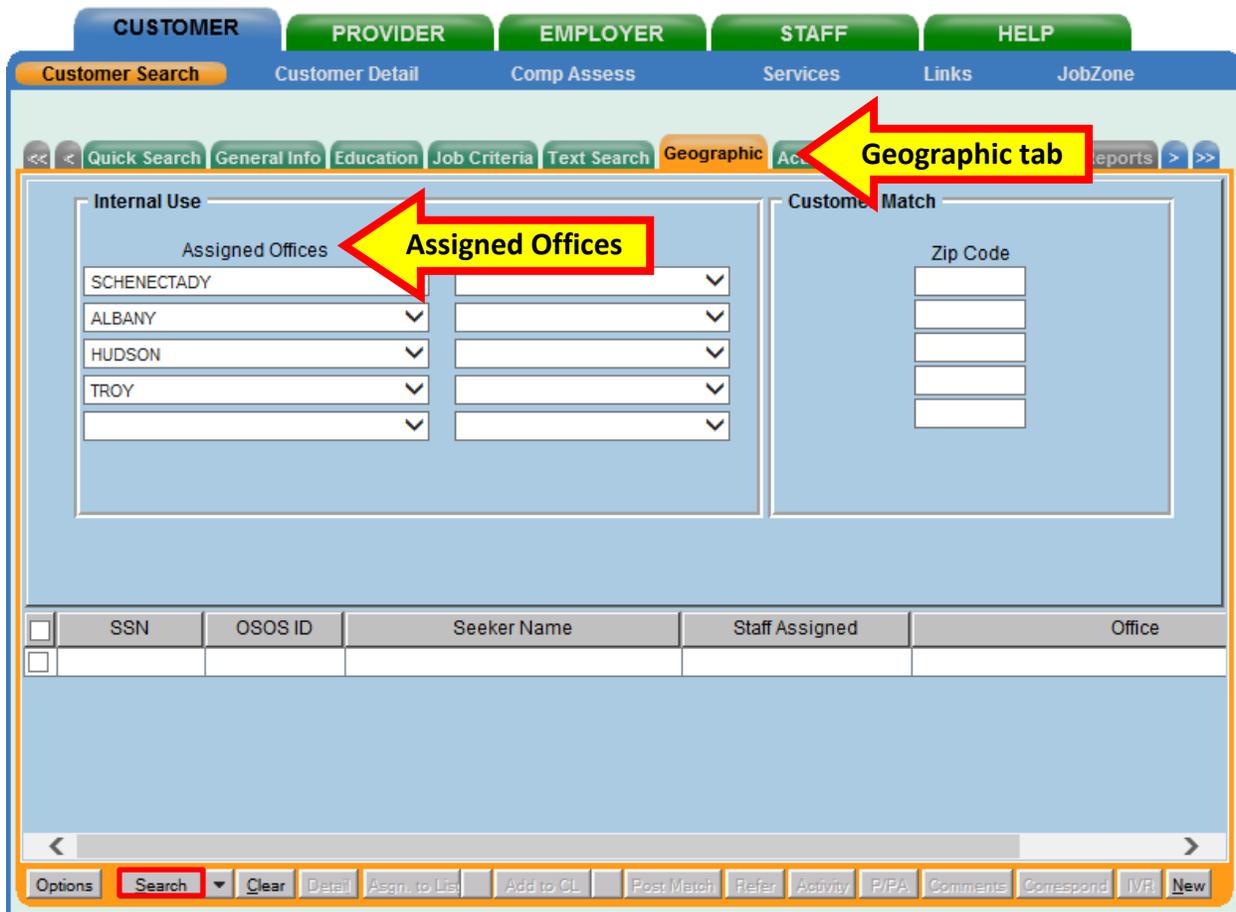
Select the list.



Additional search criterion may be added to reduce the results to a portion of the records in **My Case Load**.

For example, staff assigned to multiple offices may prefer to limit the search results to customers in a specific office. This can be done within the **Geographic** tab and selecting the desired **Assigned Offices**.

After the search criteria has been selected, click the **Search** button.



CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services Links

1 - 4 of 4

Quick Search General Info Education Job Criteria Text Search Geographic Activities Programs List Search Reports

1 - 1 of 1

Office	Staff	List Name	Created	Statewide	Shared
NY9999	PIACENTE, JASON	Customer Case Load for PIACE	10/13/2015	No	

Individual Lists

Lookup List

- Show Only My Lists
- Show Lists in My Office
- Show All Office Lists
- My Case Load
- Show Statewide Lists
- Show Individual Lists
- Show Both

When searching, retrieve records found in:

- Any list selected
- All lists selected

SSN	OSOS ID	Seeker Name	Staff Assigned	Office
<input checked="" type="checkbox"/>	NY014972398	DOE, JOHN J	PIACENTE, JASON	TROY
<input type="checkbox"/>	NY015038196	JOHNSON, ROBERT	PIACENTE, JASON	SCHENECTADY
<input checked="" type="checkbox"/>	NY014993615	MALINAK, VET	PIACENTE, JASON	HUDSON
<input type="checkbox"/>	NY015038197	SMITH, PHYLLIS	PIACENTE, JASON	ALBANY

Export  
Print List  
Save Search

Options Search Clear Detail Asgn. to List Add to CL Post Match Refer Activity P/PA Comments Correspond IVR New

**Export or Print List**

One or more customer records can be selected and exported to an Excel spreadsheet by clicking the arrow next to the **Search** button and following the steps described earlier in this guide.

## RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found at:

<https://labor.ny.gov/workforcenypartners/osos.shtm>

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: [help.osos@labor.ny.gov](mailto:help.osos@labor.ny.gov)