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.

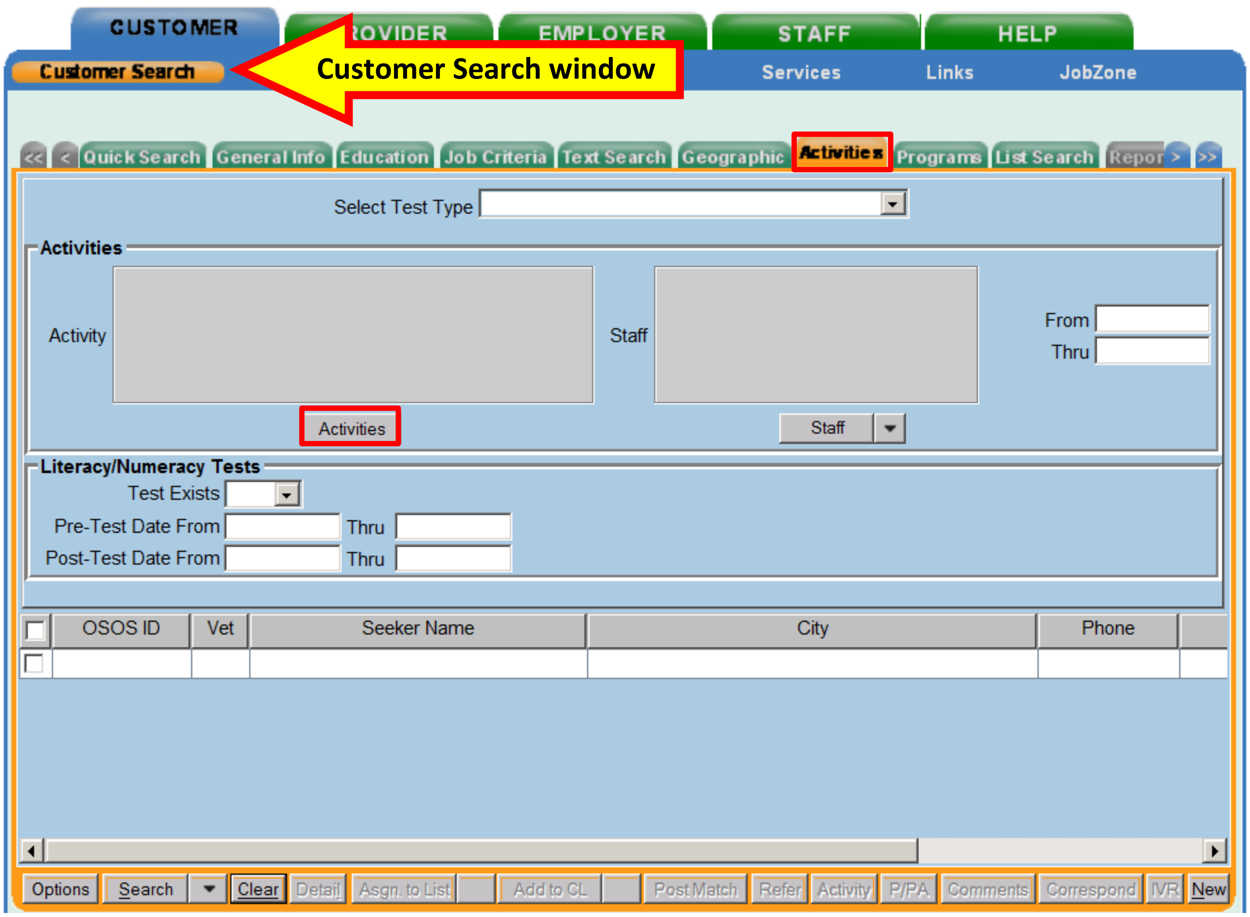
OSOS DATA ENTRY

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.

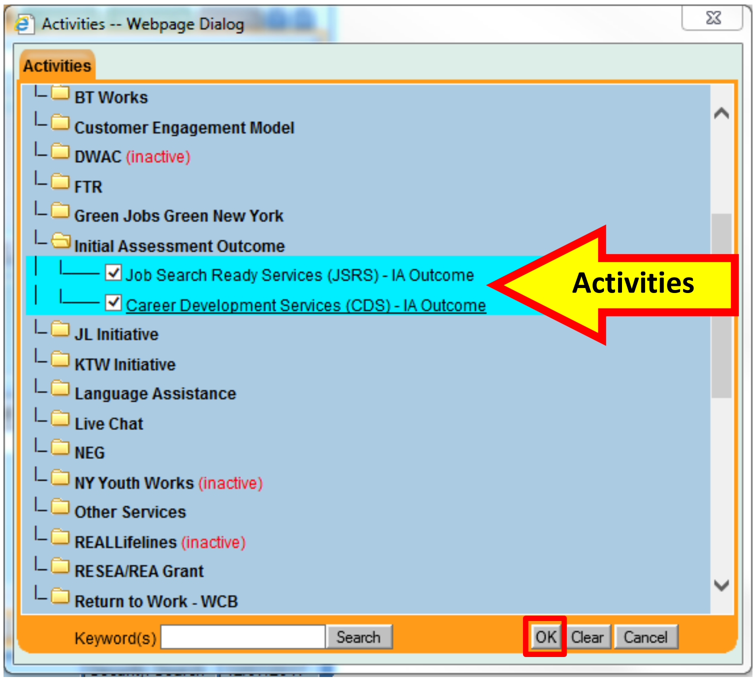
Select the **Activities** tab in the **Customer Search** window.

Click the **Activities** button.



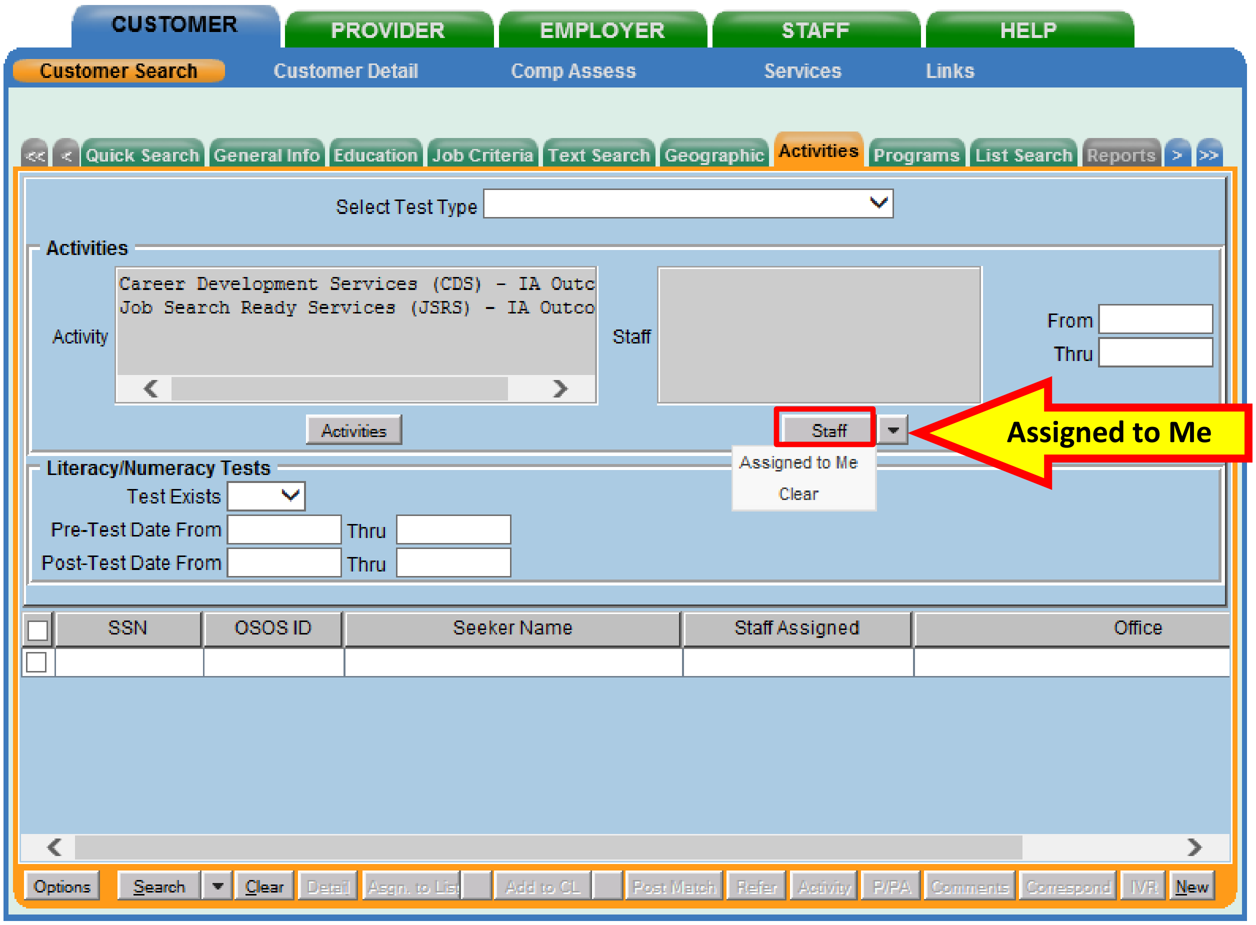
Select any activities within the **Activities - - Webpage Dialog** box that will identify the desired customers.

Click the **OK** button.

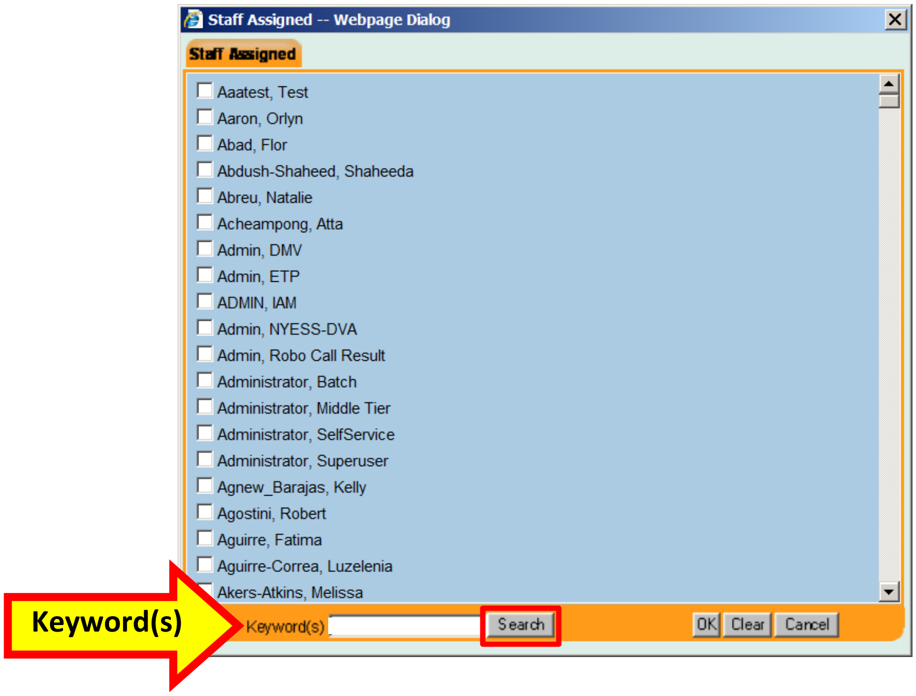


Next, click the **Staff** button.

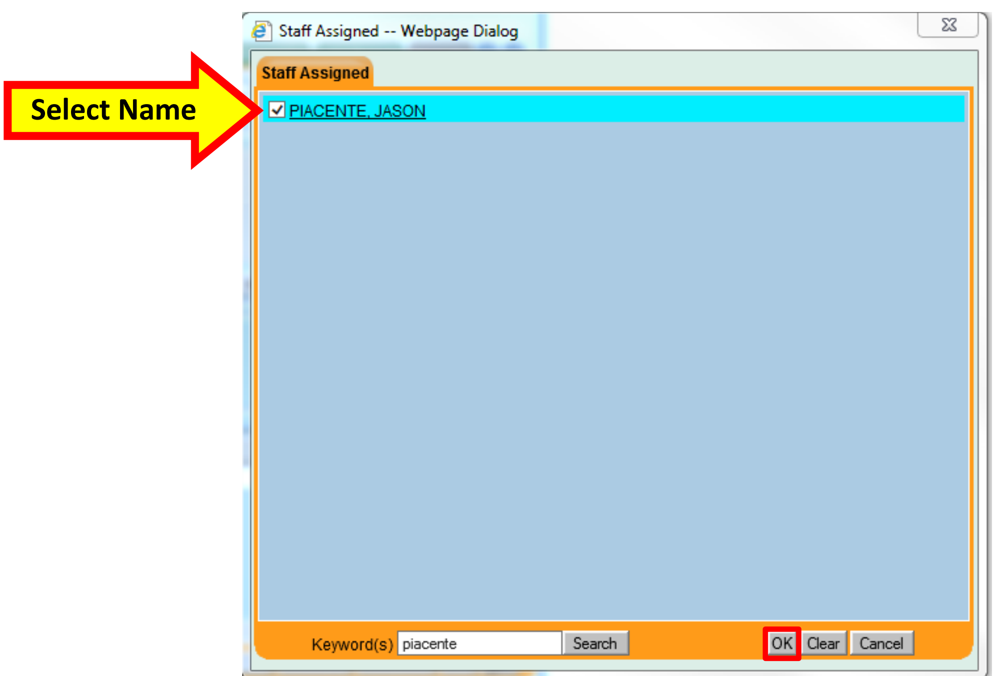
Clicking the arrow next to the **Staff** button will allow users to search for customers assigned to themselves.



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.

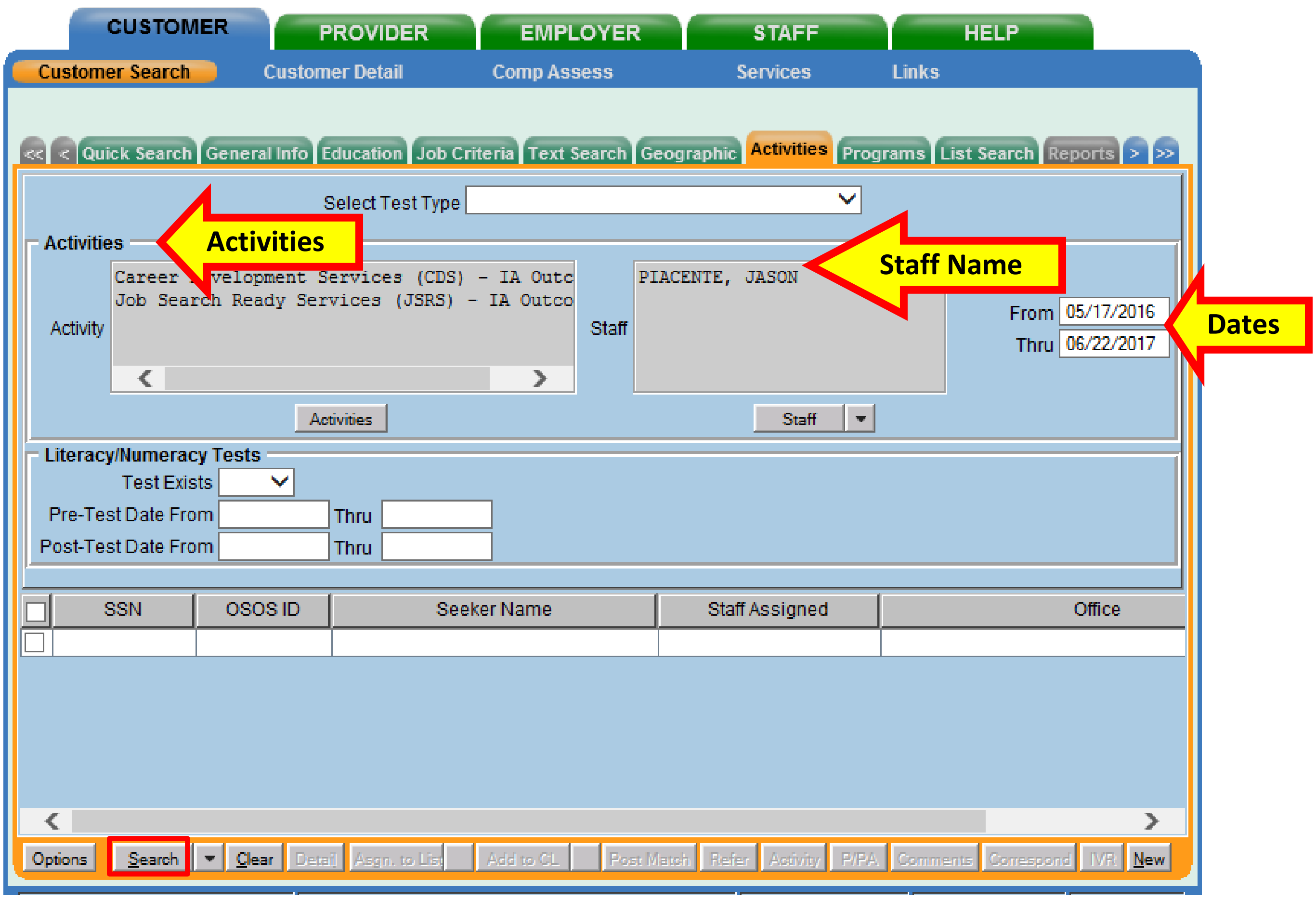


The selected activities and staff member's name will be visible.

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

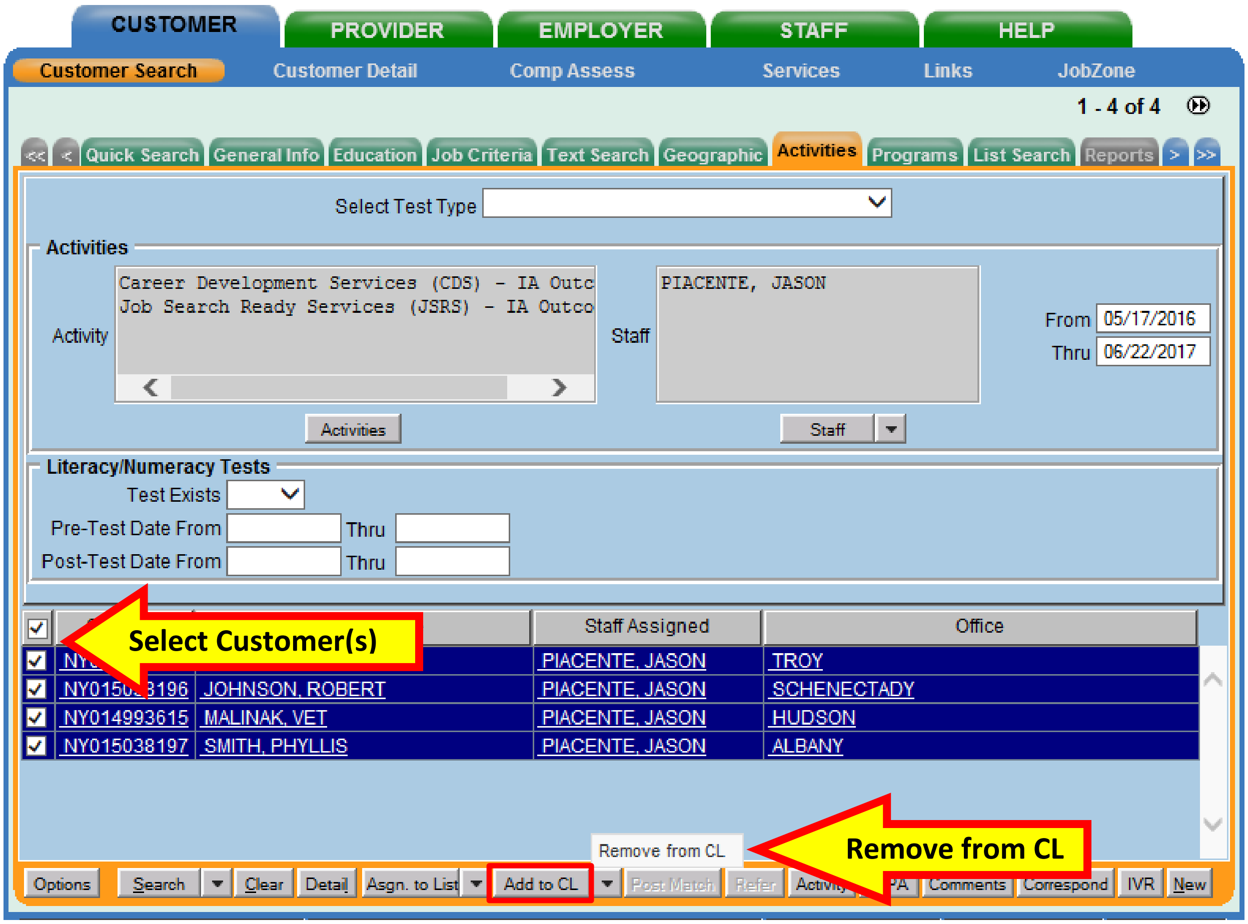
Click the **Search** button.

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.



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.

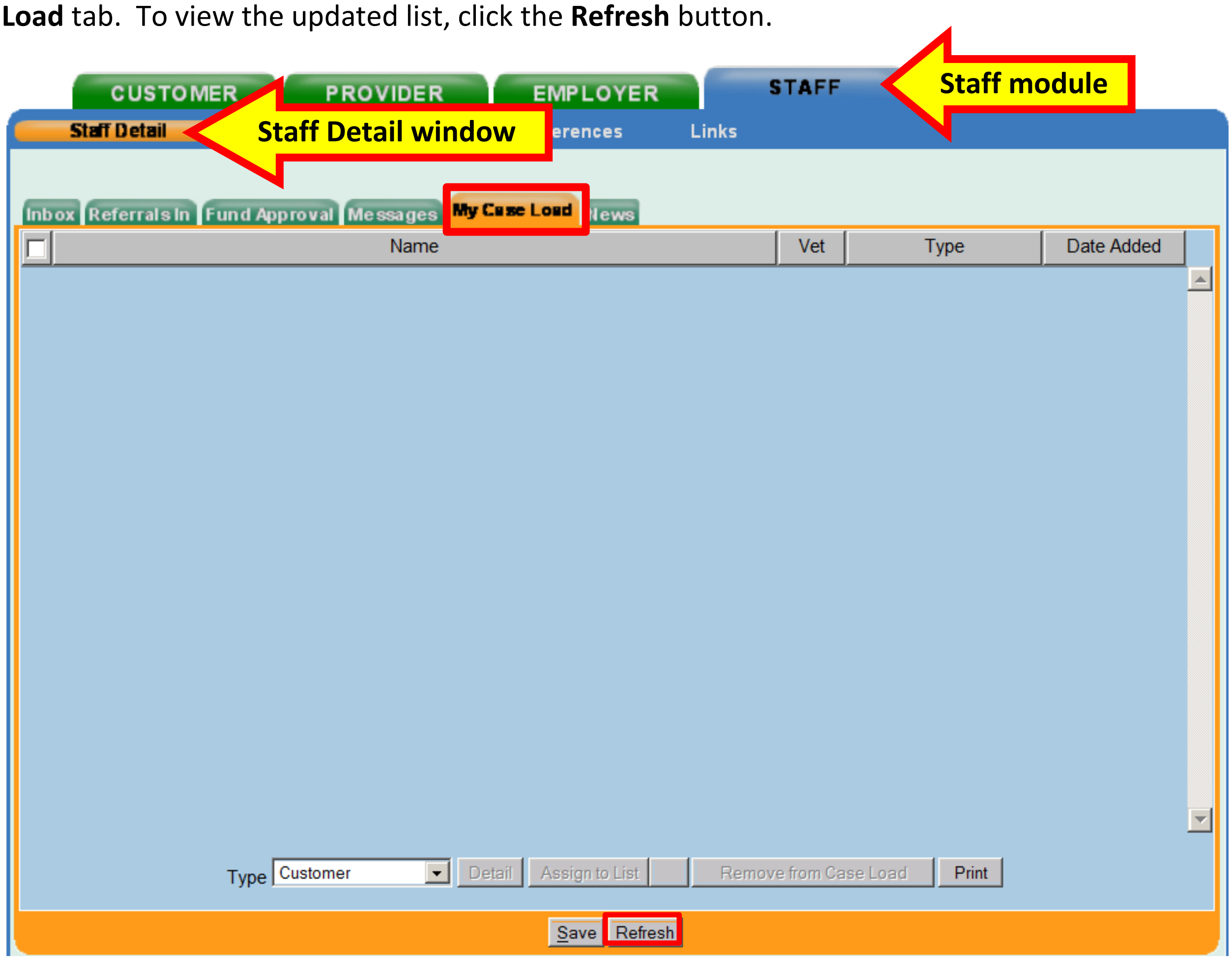
Clicking the arrow next to the **Add to CL** button will access the **Remove from CL** option.



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.

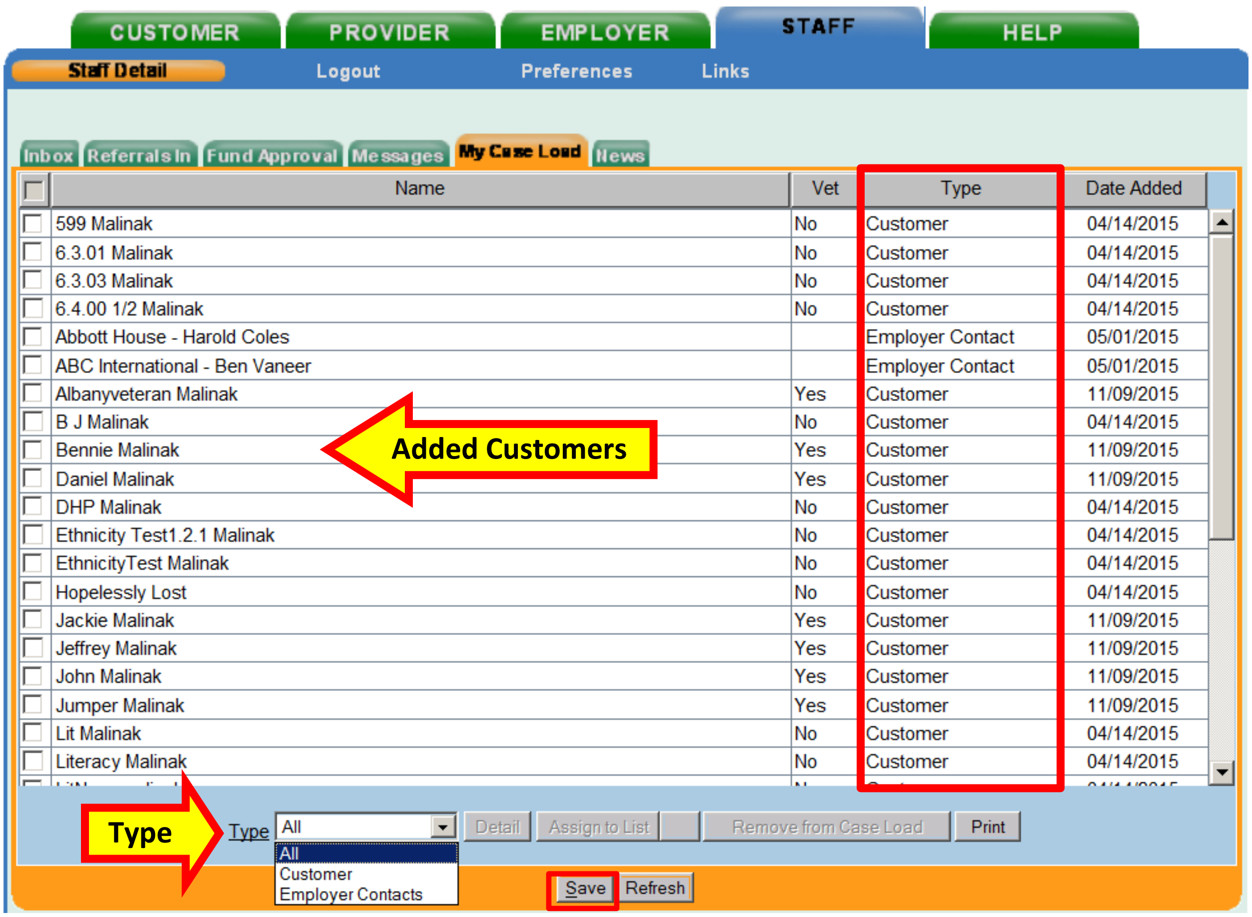
To view the case load, click the **Staff** module, then the **Staff Detail** window, then the **My Case Load** tab. To view the updated list, click the **Refresh** button.



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.



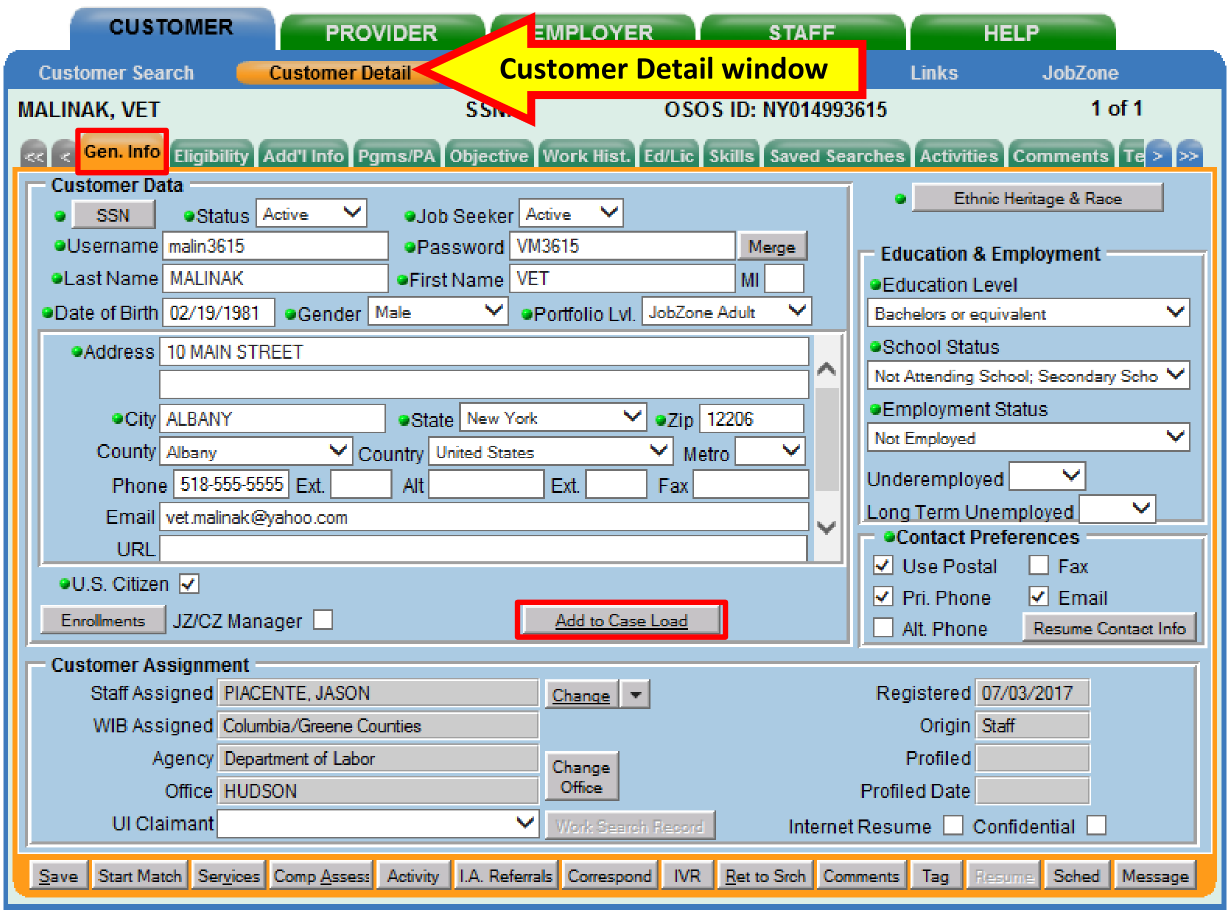
ADDING INDIVIDUAL CUSTOMERS TO MY CASE LOAD

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.

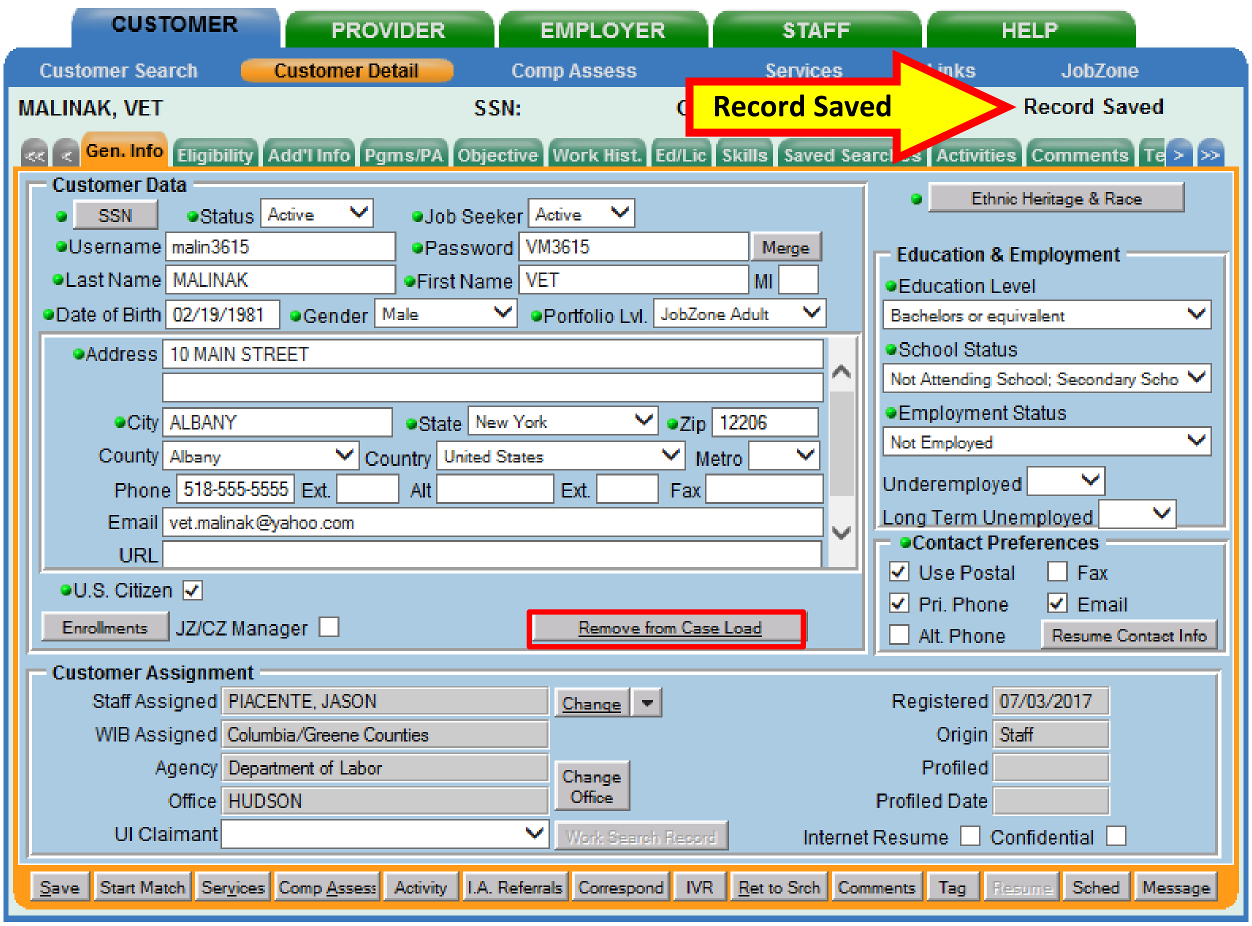
There is no need to save the record.



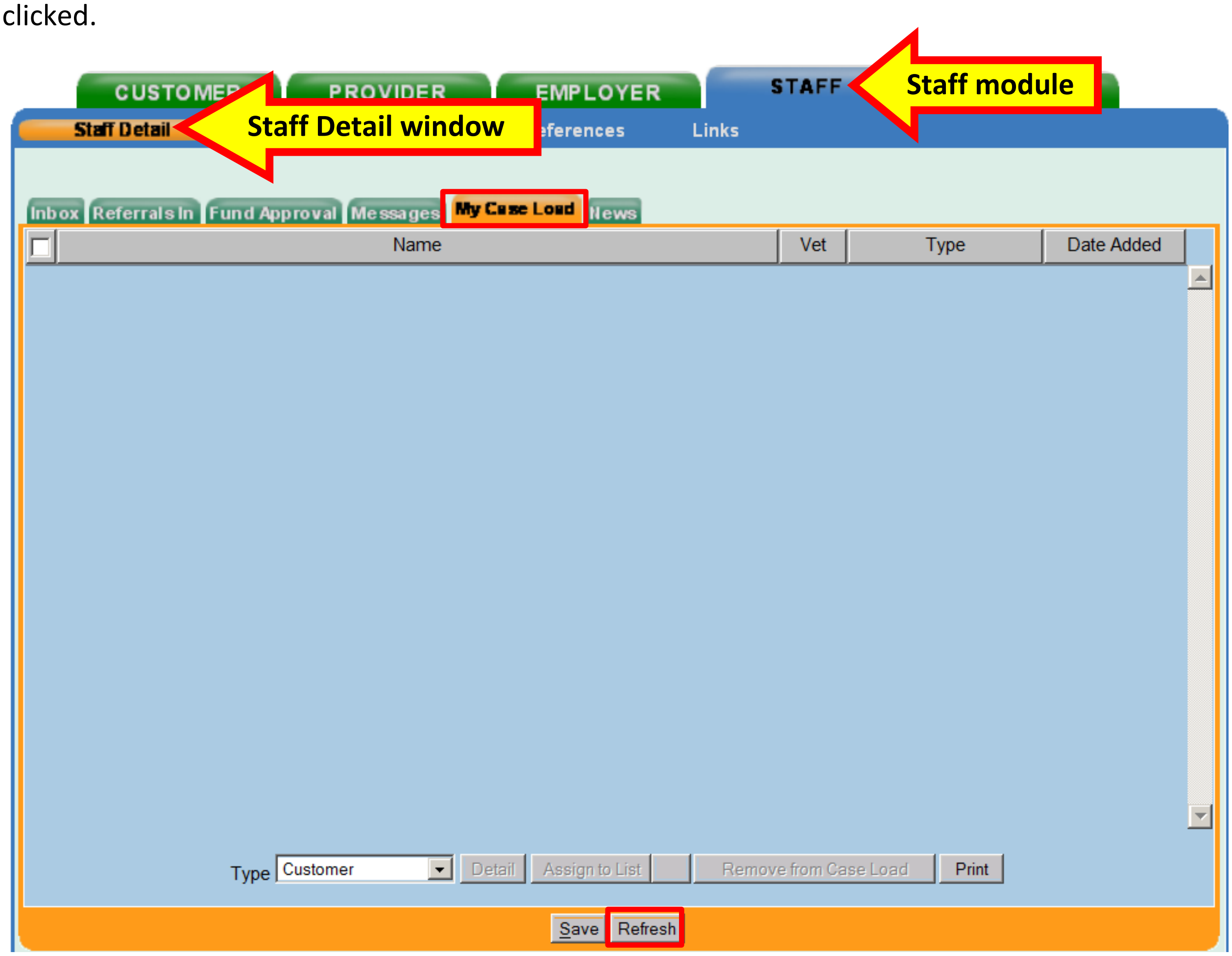
After adding the record to the case load, the "Record Saved" confirmation message will briefly appear in the top right hand corner.

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.

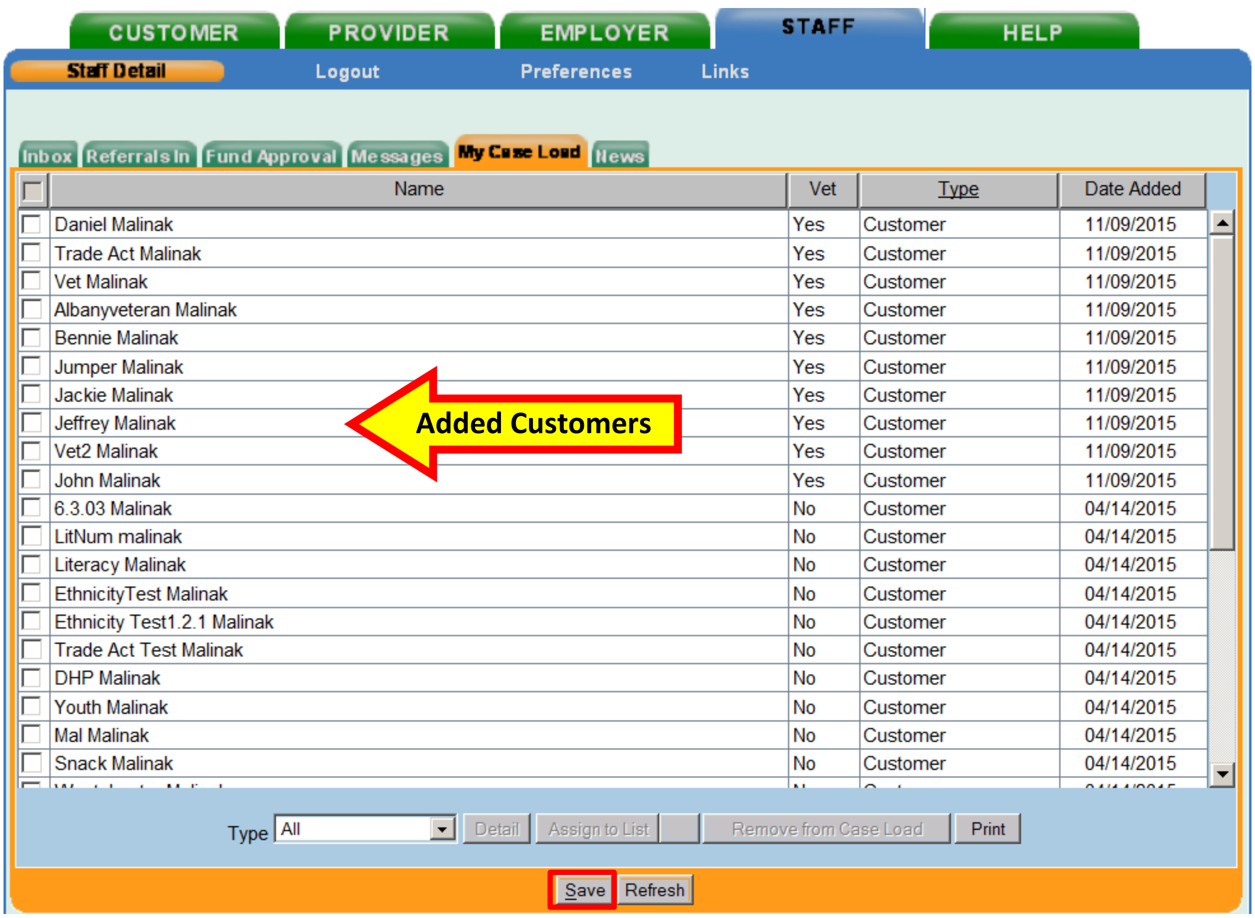


The added records will not be visible in the **My Case Load** tab until the **Refresh** button is clicked.



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

Click the **Save** button when finished.

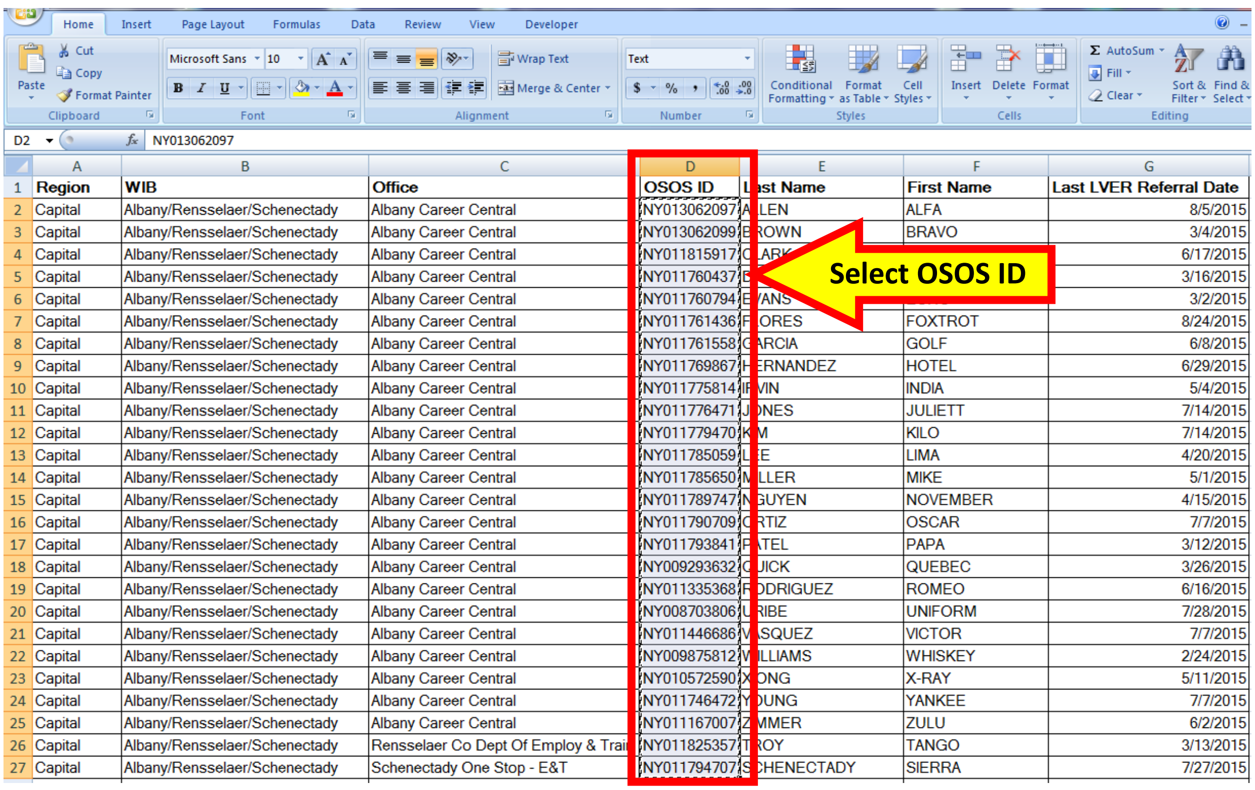


![OSOS One-Stop Operating System]

ADDING MULTIPLE CUSTOMERS TO MY CASE LOAD

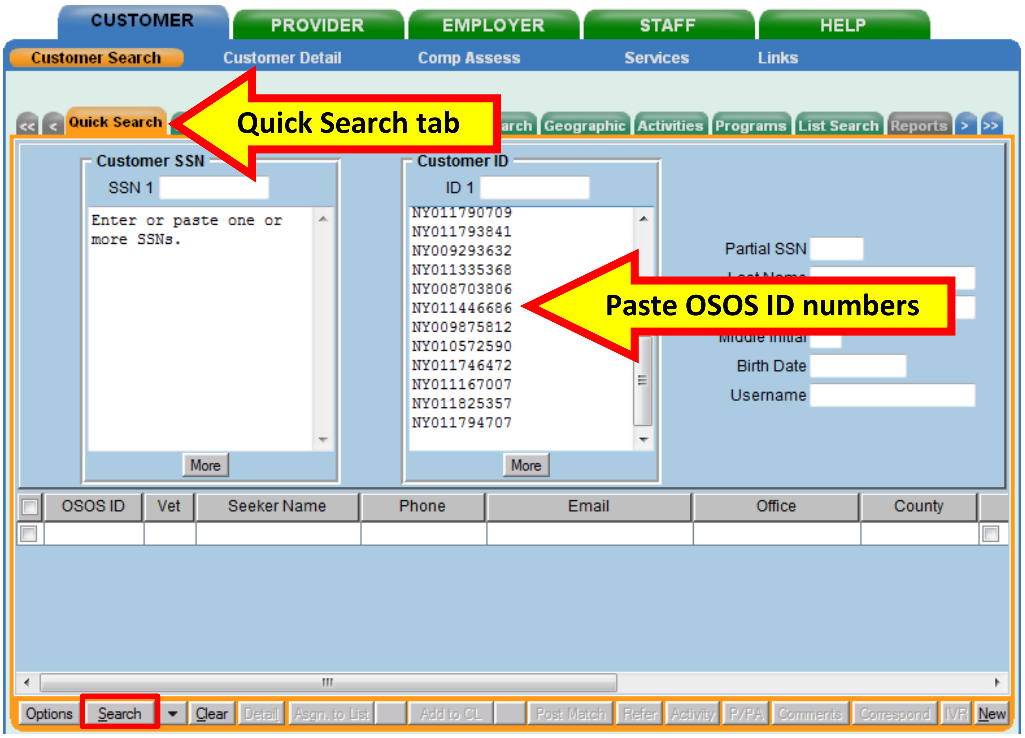
Multiple customers can be added to a case load at one time. For example, a group of customers can be added from a list or spreadsheet containing Social Security or OSOS ID numbers.

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.

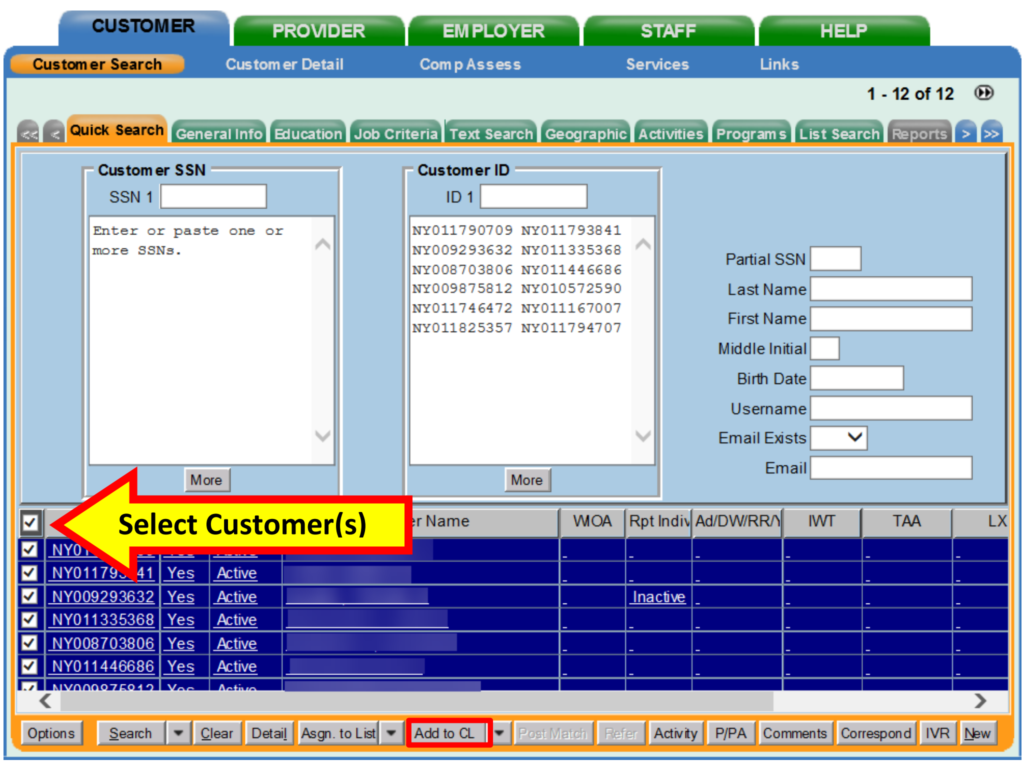


	A	B	C	D	E	F	G
1	Region	WIB	Office	OSOS ID	Last Name	First Name	Last LVER Referral Date
2	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY013062097	ALLEN	ALFA	8/5/2015
3	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY013062099	BROWN	BRAVO	3/4/2015
4	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011815917	CLARK	[illegible]	6/17/2015
5	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011760437	[illegible]	[illegible]	3/16/2015
6	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011760794	EVANS	[illegible]	3/2/2015
7	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011761436	FLORES	FOXTROT	8/24/2015
8	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011761558	GARCIA	GOLF	6/8/2015
9	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011769867	HERNANDEZ	HOTEL	6/29/2015
10	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011775814	IRVIN	INDIA	5/4/2015
11	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011776471	JONES	JULIETT	7/14/2015
12	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011779470	KIM	KILO	7/14/2015
13	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011785059	LEE	LIMA	4/20/2015
14	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011785650	MILLER	MIKE	5/1/2015
15	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011789747	NGUYEN	NOVEMBER	4/15/2015
16	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011790709	ORTIZ	OSCAR	7/7/2015
17	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011793841	PATEL	PAPA	3/12/2015
18	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY009293632	QUICK	QUEBEC	3/26/2015
19	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011335368	RODRIGUEZ	ROMEO	6/16/2015
20	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY008703806	URIBE	UNIFORM	7/28/2015
21	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011446686	VASQUEZ	VICTOR	7/7/2015
22	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY009875812	WILLIAMS	WHISKEY	2/24/2015
23	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY010572590	XIONG	X-RAY	5/11/2015
24	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011746472	YOUNG	YANKEE	7/7/2015
25	Capital	Albany/Rensselaer/Schenectady	Albany Career Central	NY011167007	ZIMMER	ZULU	6/2/2015
26	Capital	Albany/Rensselaer/Schenectady	Rensselaer Co Dept Of Employ & Trai	NY011825357	TROY	TANGO	3/13/2015
27	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.



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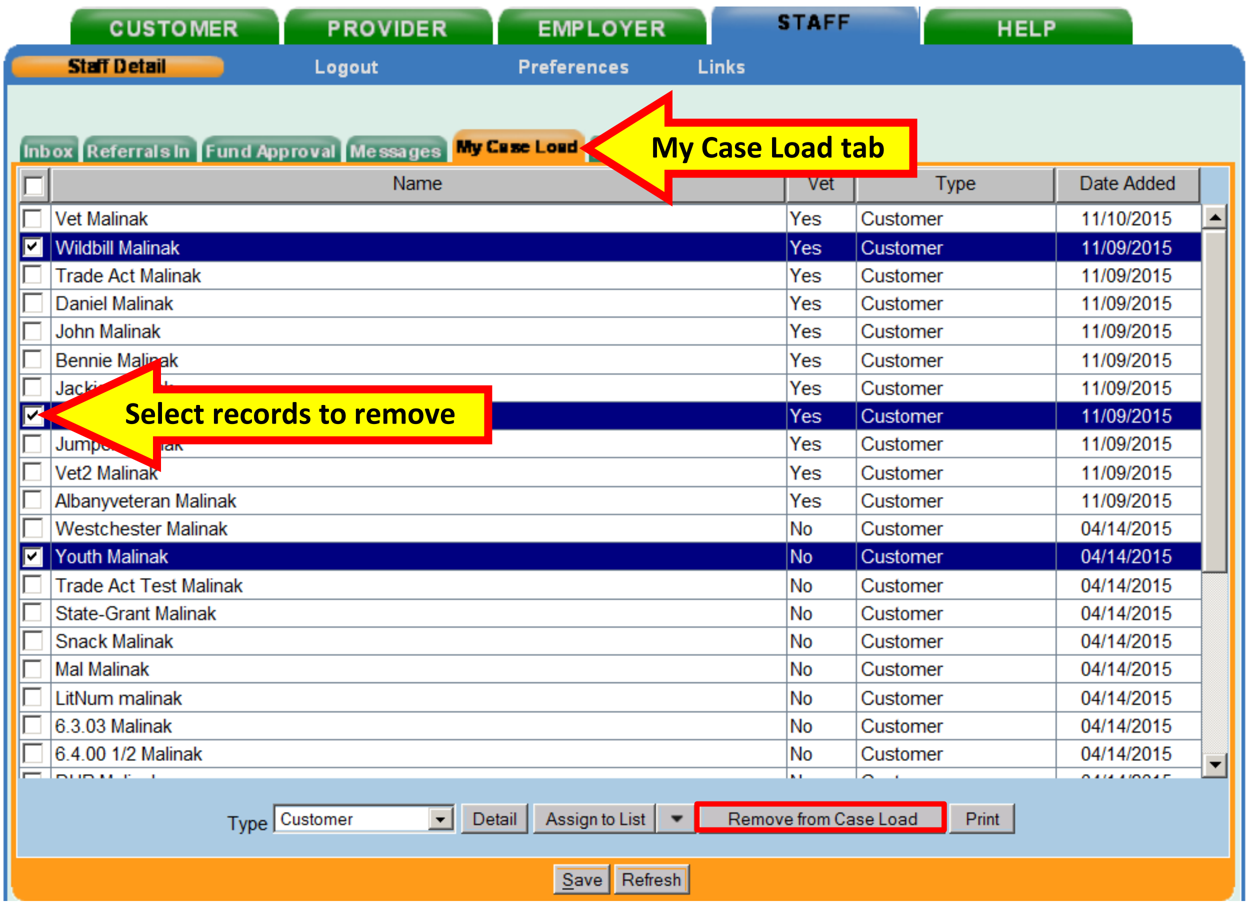
REMOVING CUSTOMERS FROM AN EXISTING CASE LOAD

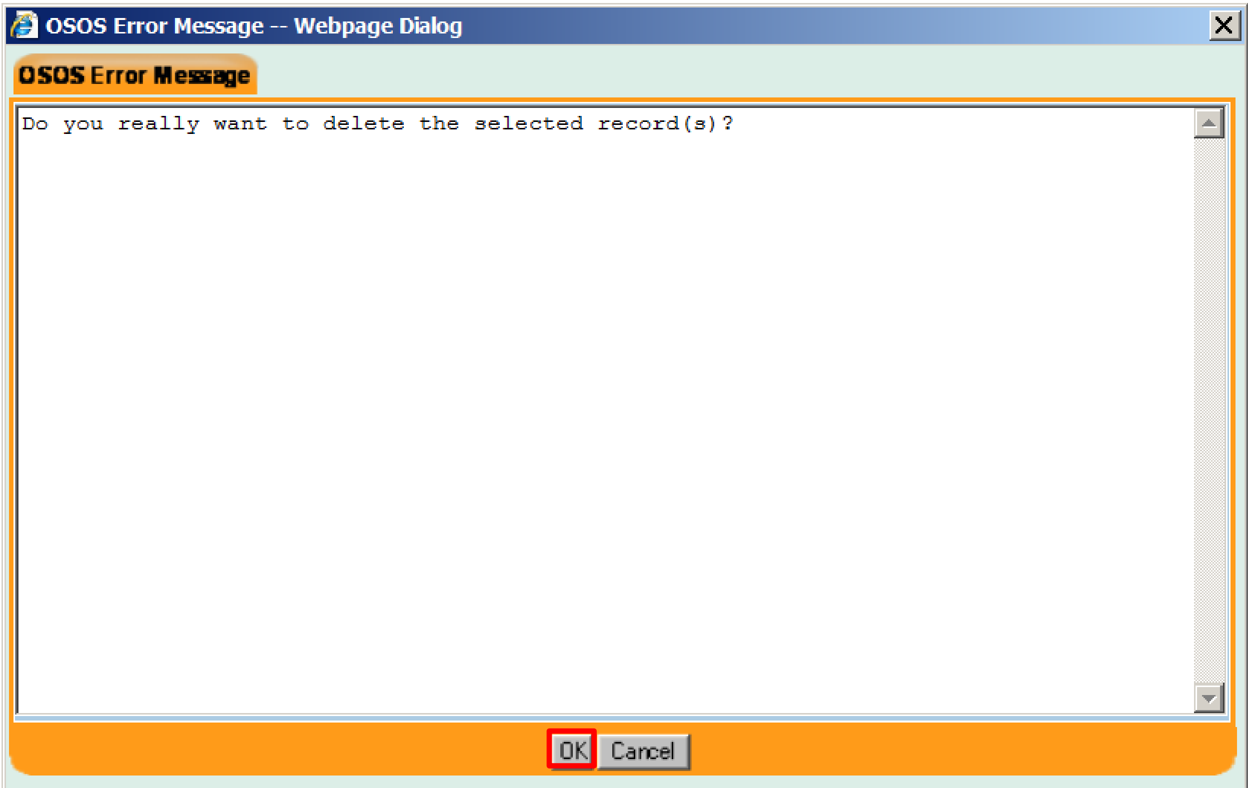
Users may remove records from the case load from the **My Case Load** tab or the **General Info** tab within the **Customer Detail** window.

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



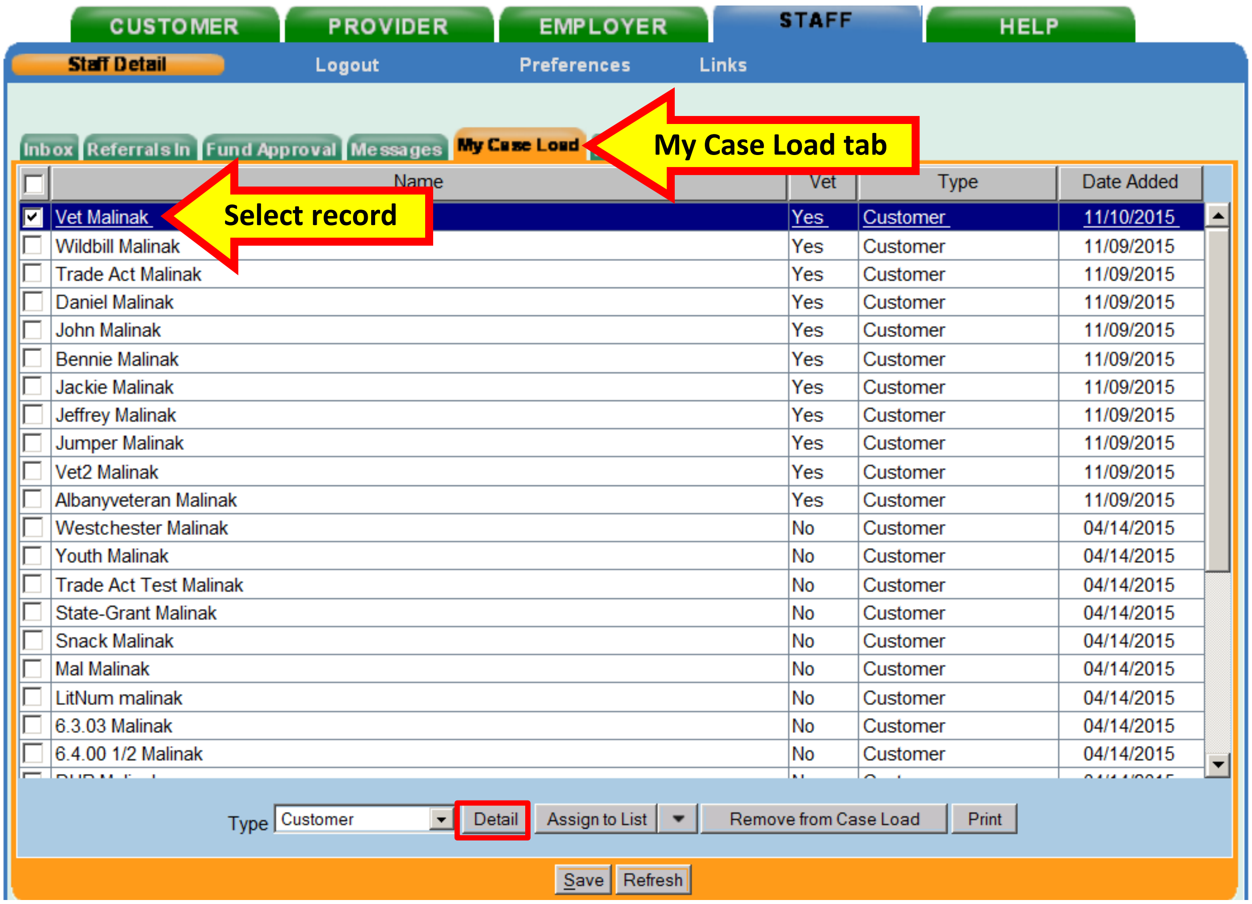
The **OSOS Error Message - - Webpage Dialog** box will appear requesting confirmation to remove the selected record(s) from the case load.

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



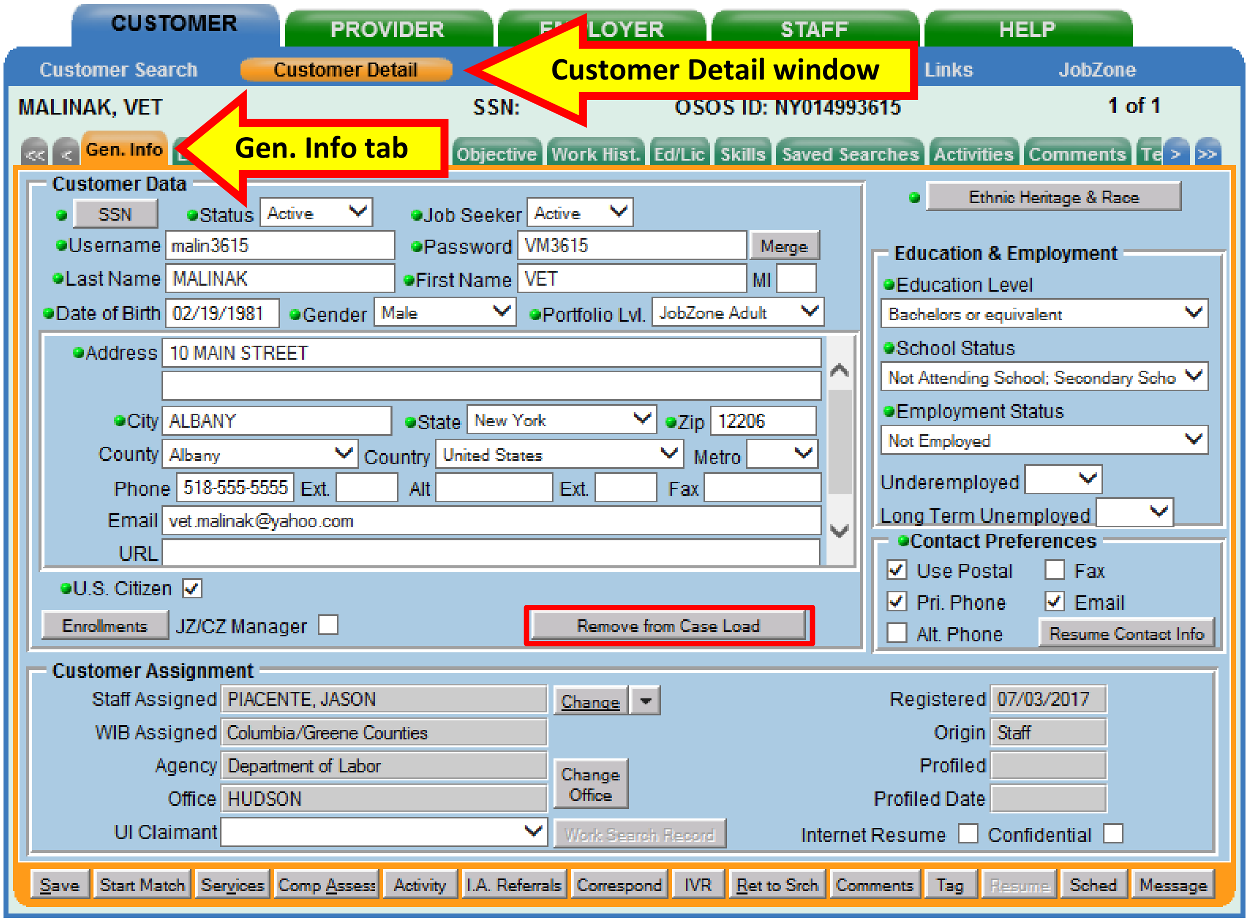
Click the **Save** button when finished.

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



The **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.

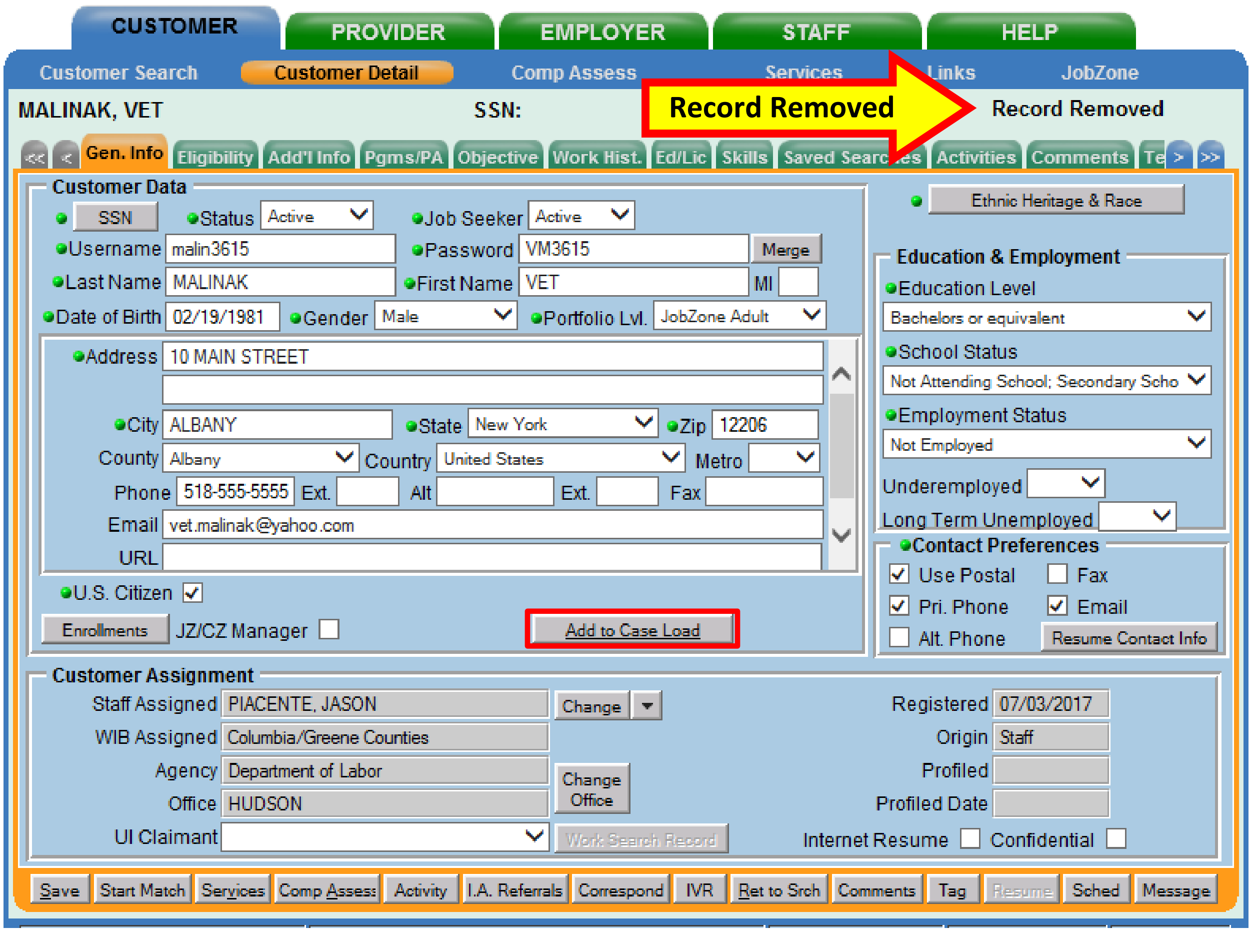
If the customer is not included in the case load, then the button displays as **Add to Case Load**.



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.

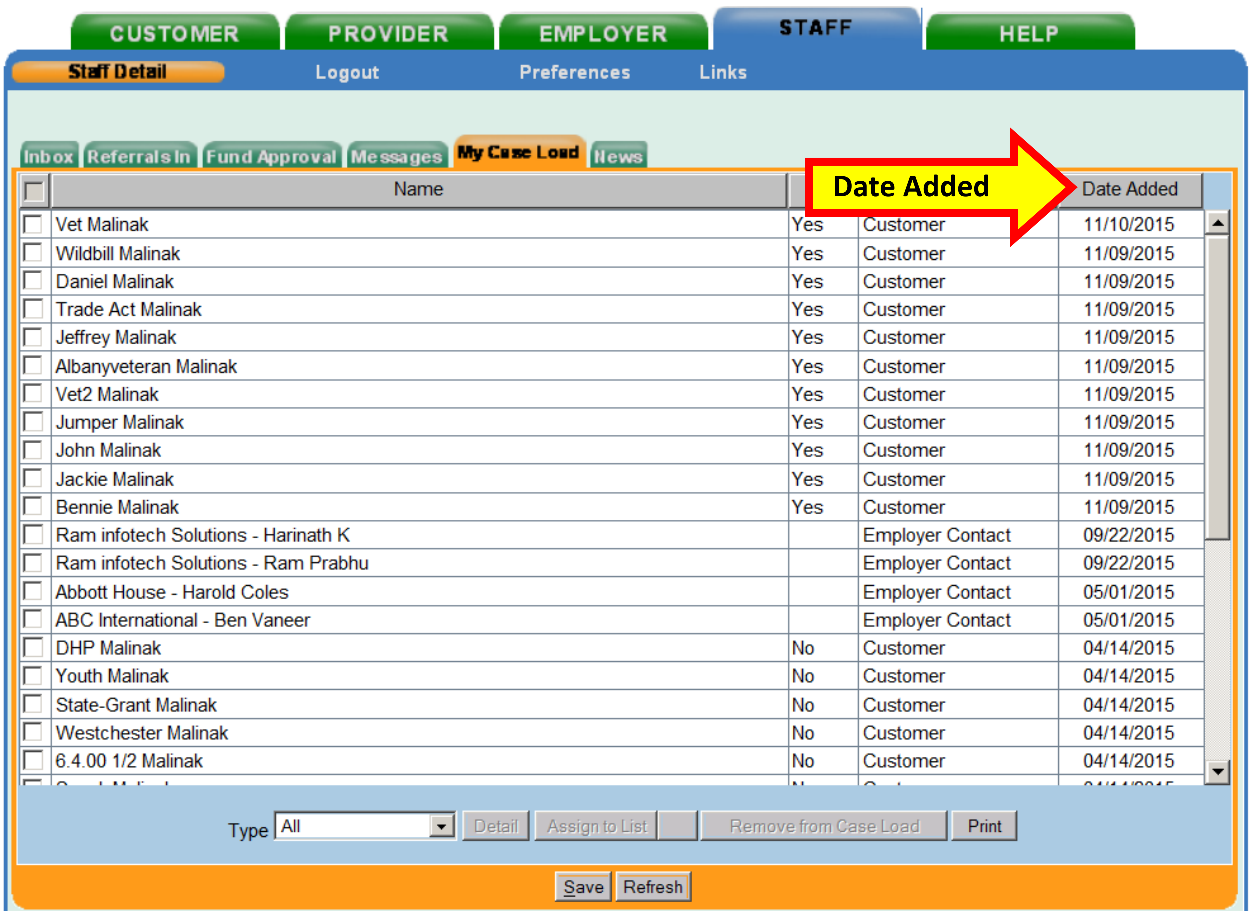
The availability of the **Add to Case Load** button confirms that the customer has been removed from the case load.

There is no need to save the record.

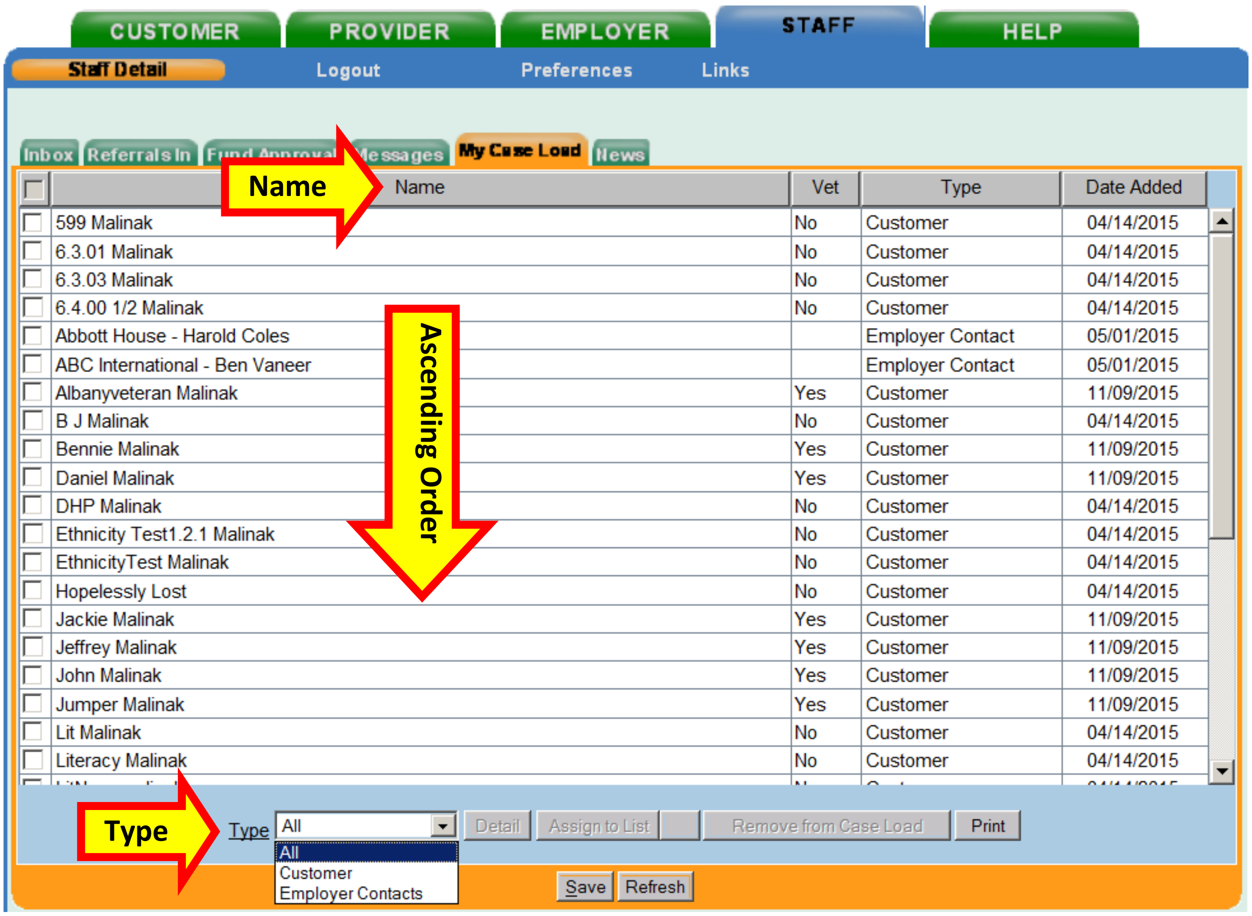


SORTING MY CASE LOAD

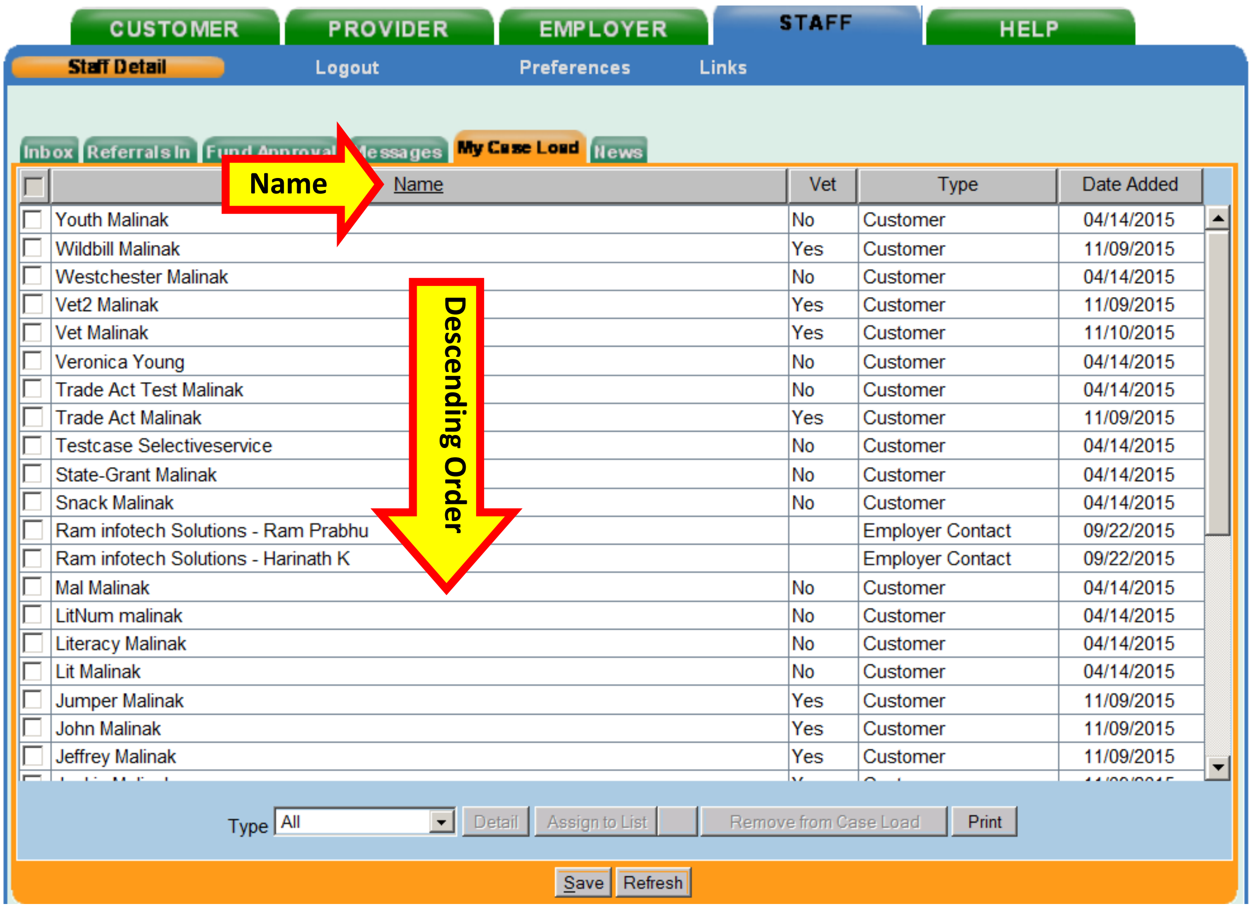
The **My Case Load** tab is automatically sorted by the **Date Added** column.



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.



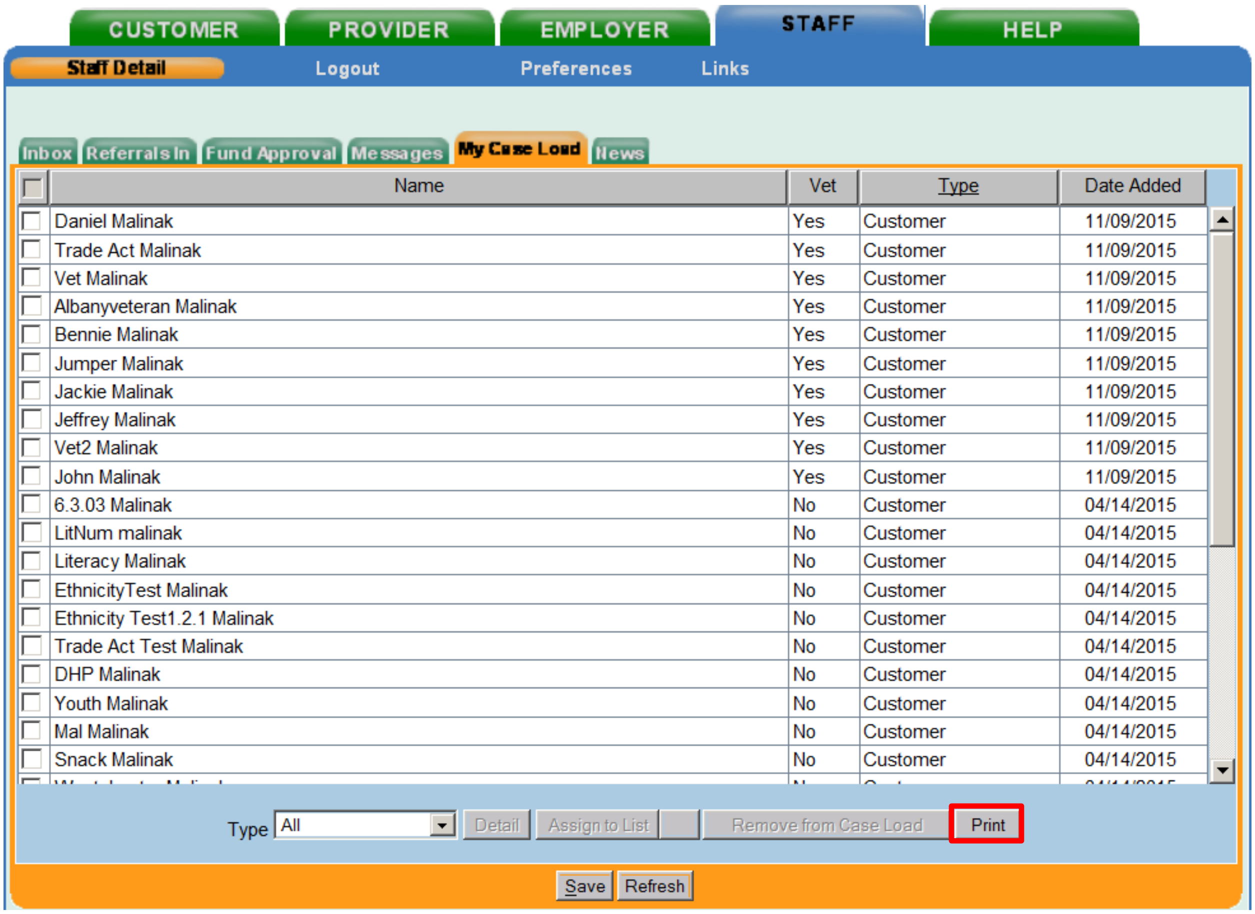
Clicking the **Name** column a second time will reverse the sorting so that it appears in descending order.



PRINTING AND EXPORTING MY CASE LOAD LIST

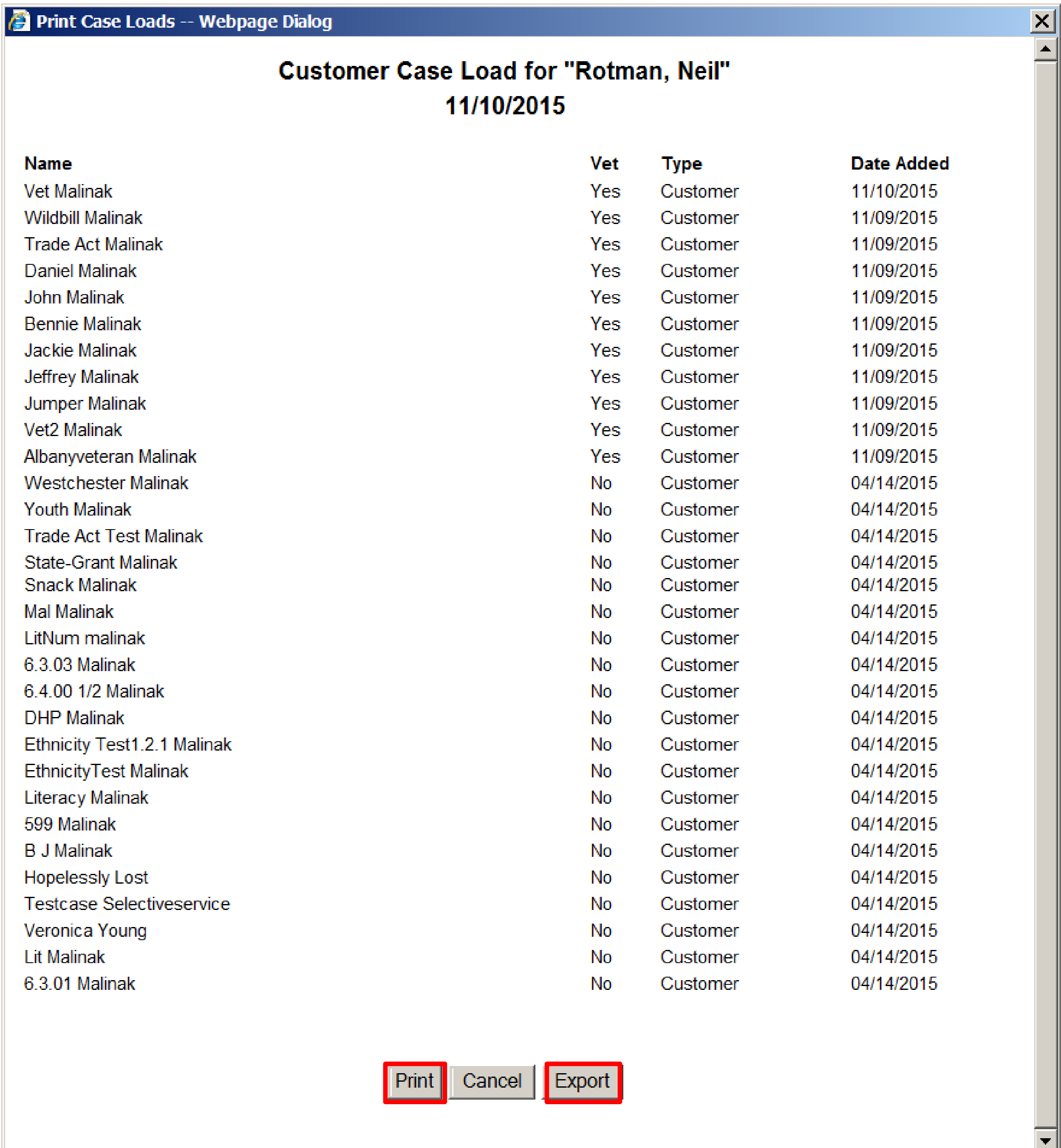
From the **My Case Load** tab, click the **Print** button to either print or export the case load.

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



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

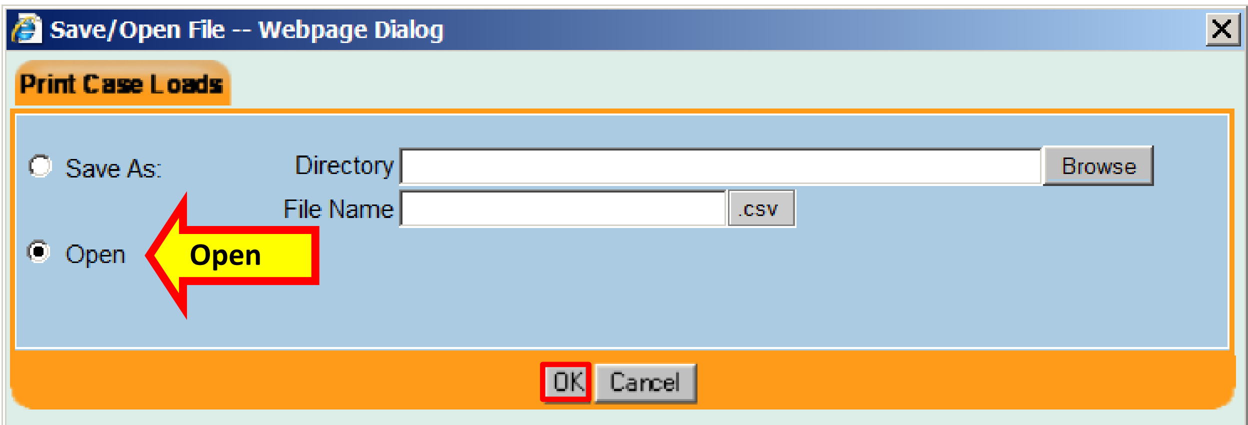
Print Cancel Export

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

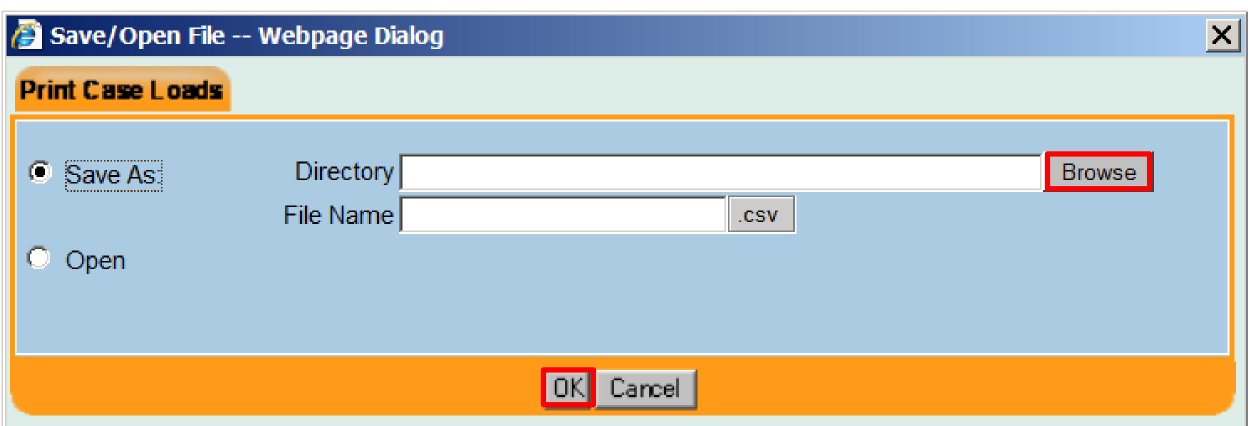
Selecting **Open** and clicking the **OK** button will immediately open the case load in an Excel spreadsheet. Once the Excel spreadsheet is open, it may be saved to the desktop or any preferred folder.



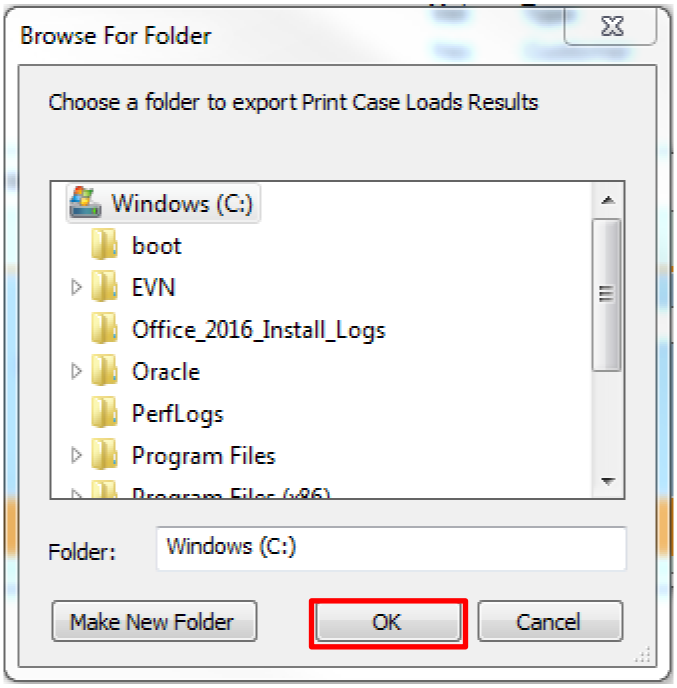
Selecting **Save As** requires the entry of a **Directory** and **File Name**.

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

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

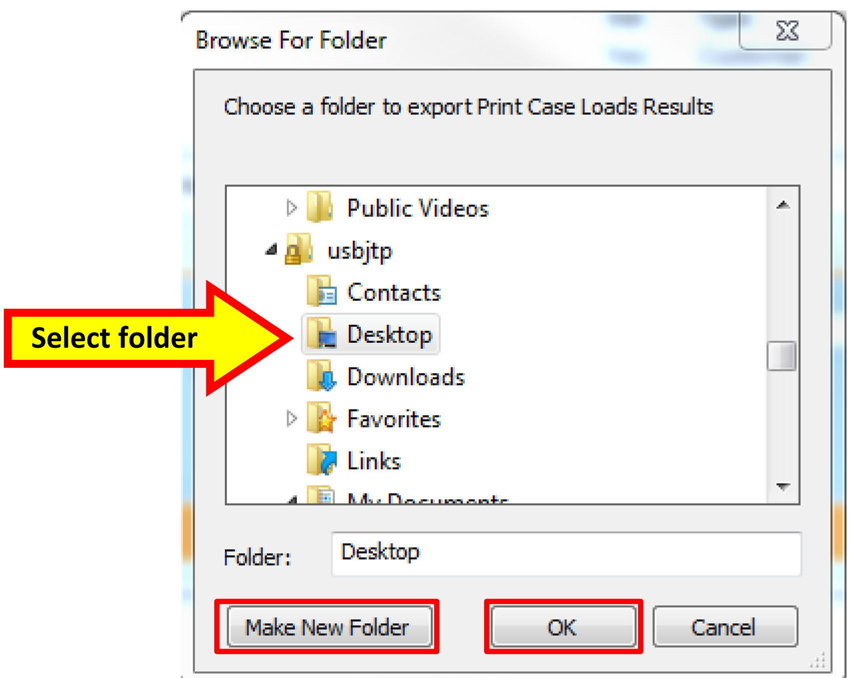


The **Browse For Folder** pop-up will appear

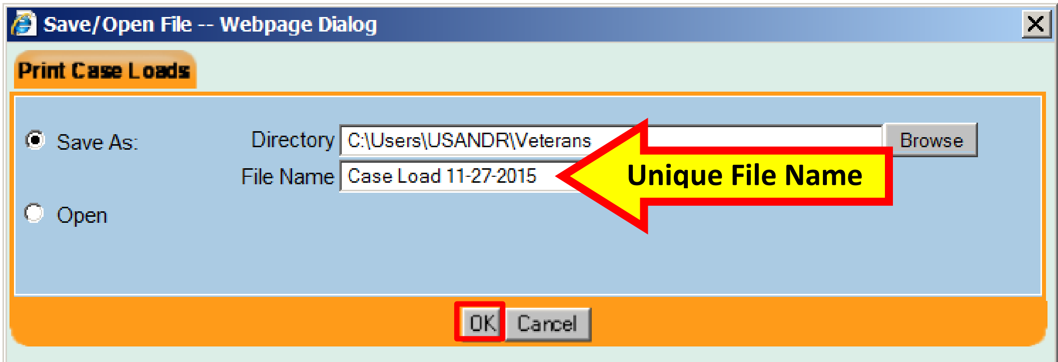


Scroll through the folders and select the preferred folder or create a new folder.

Click the **OK** button.

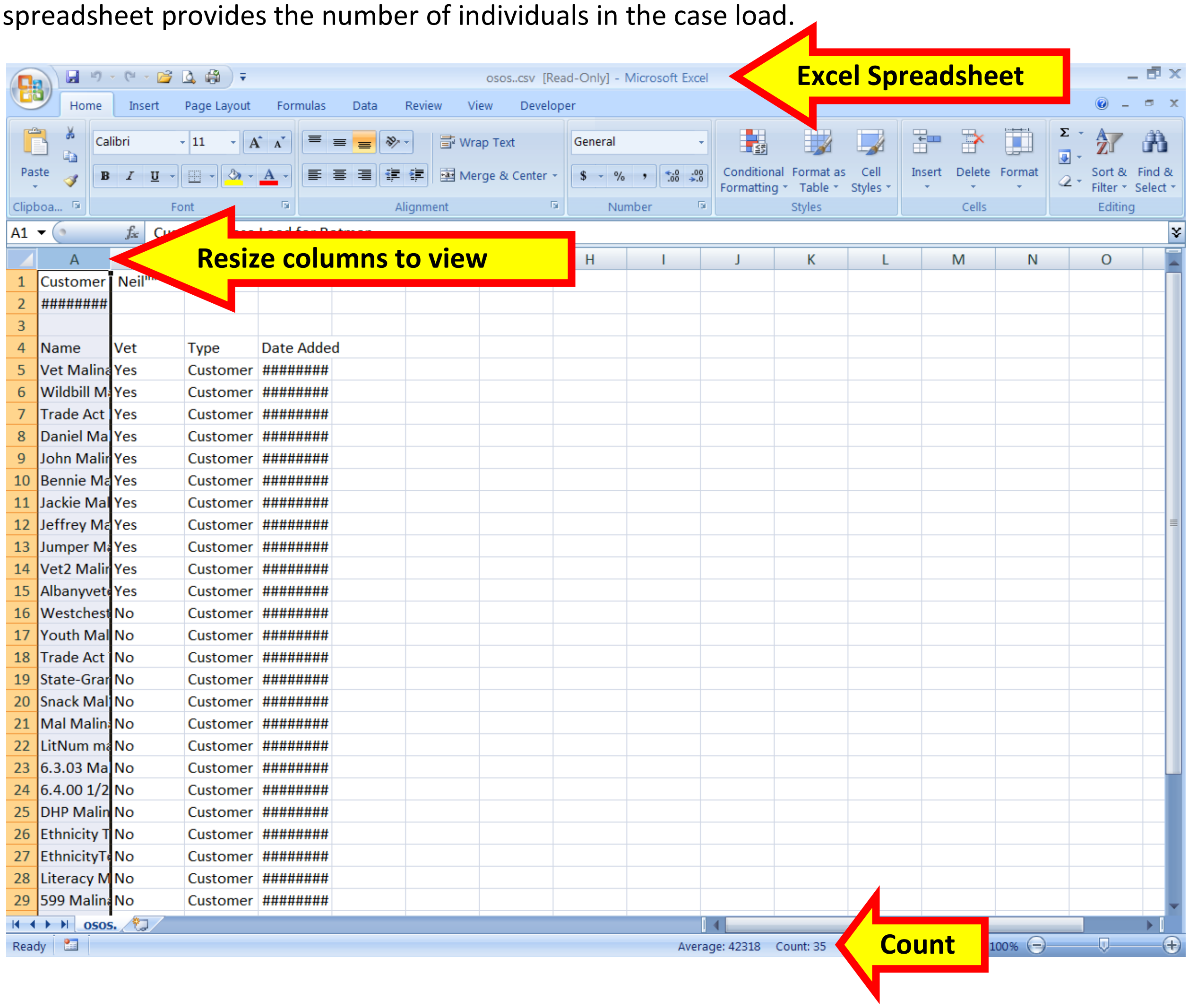


Enter a unique name for the file and click the **OK** button:



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

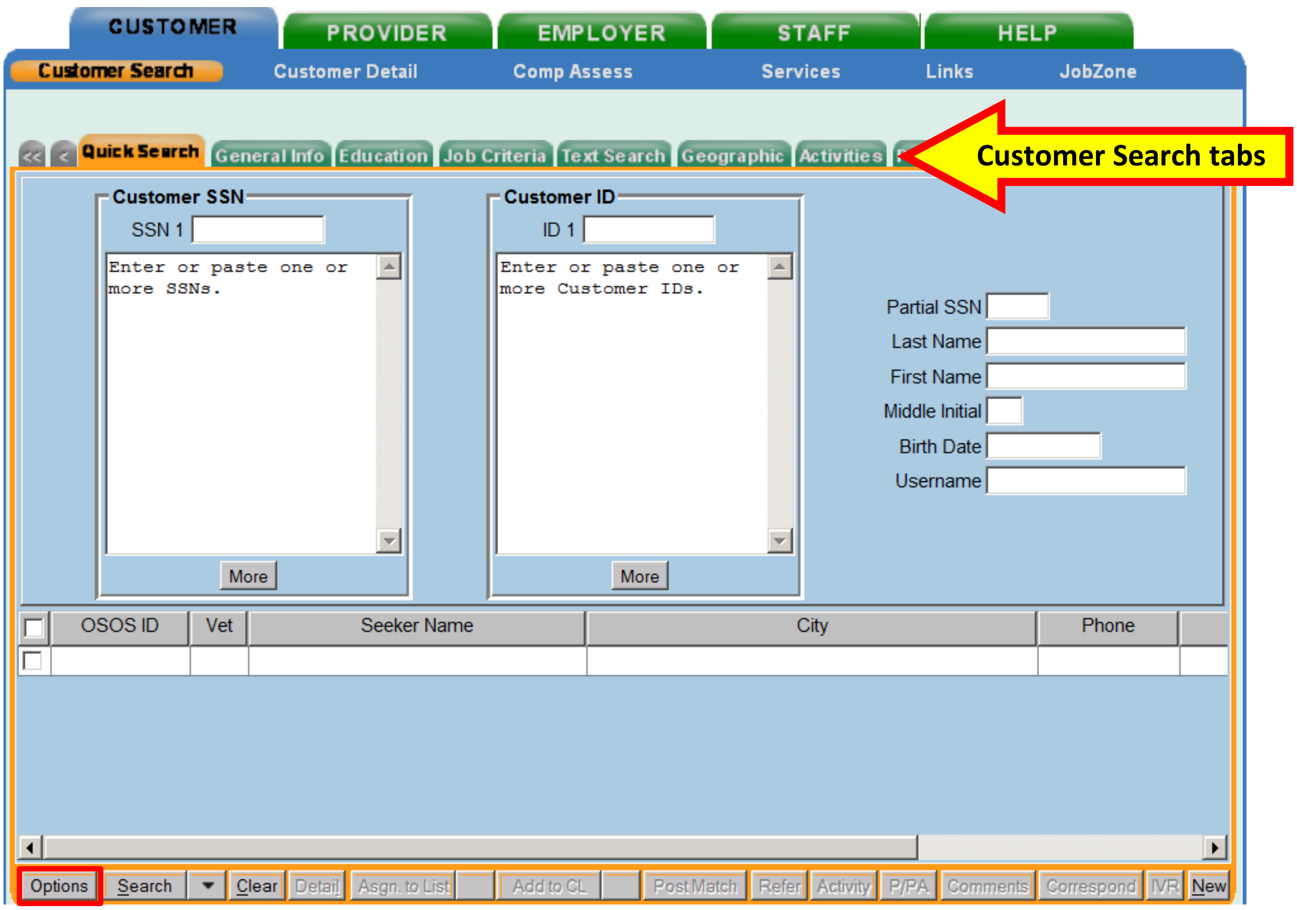
The columns will need to be resized to view the data. The **Count** at the bottom of the spreadsheet provides the number of individuals in the case load.



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.

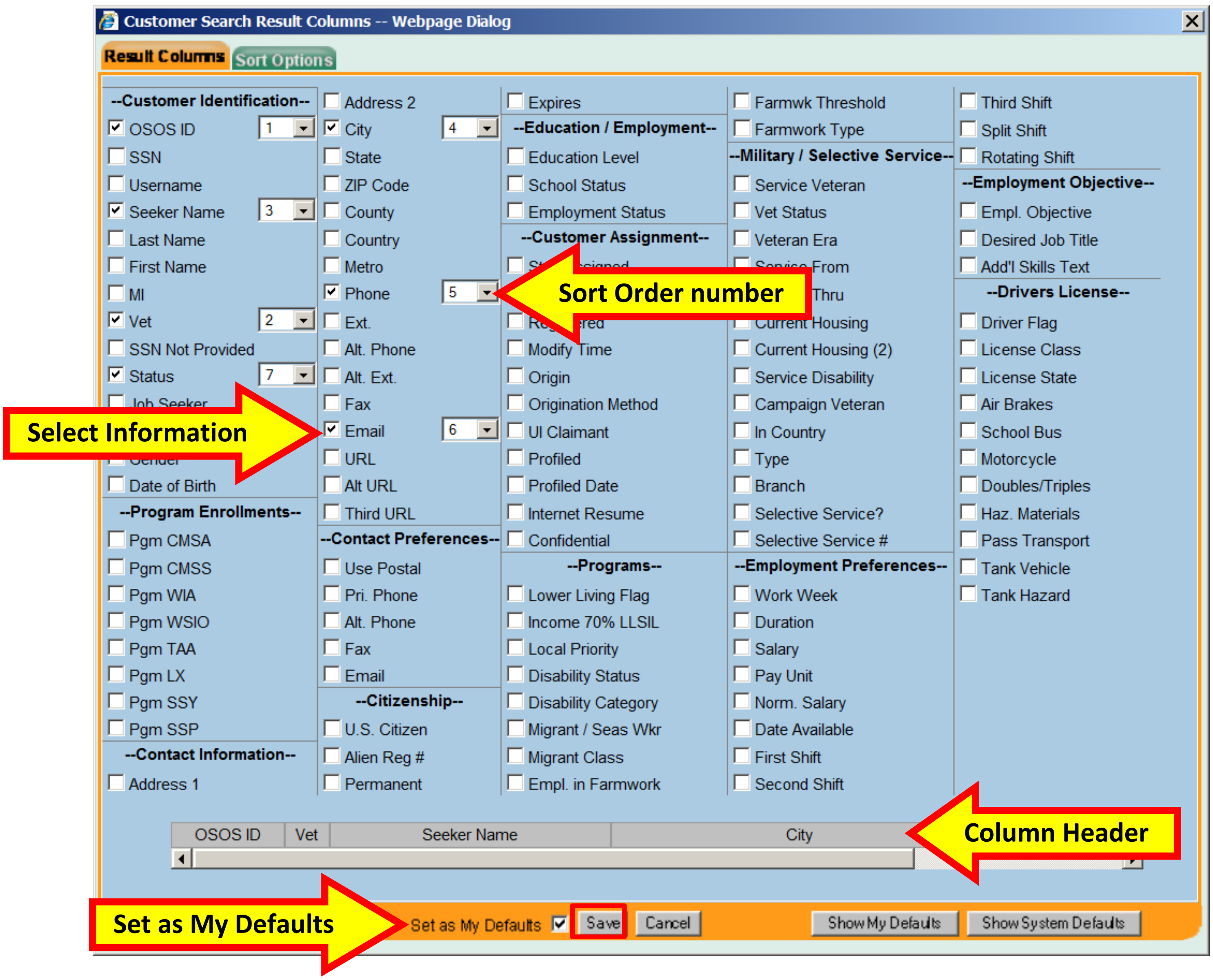


Select the information for the spreadsheet by checking the box next to the desired data.

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.

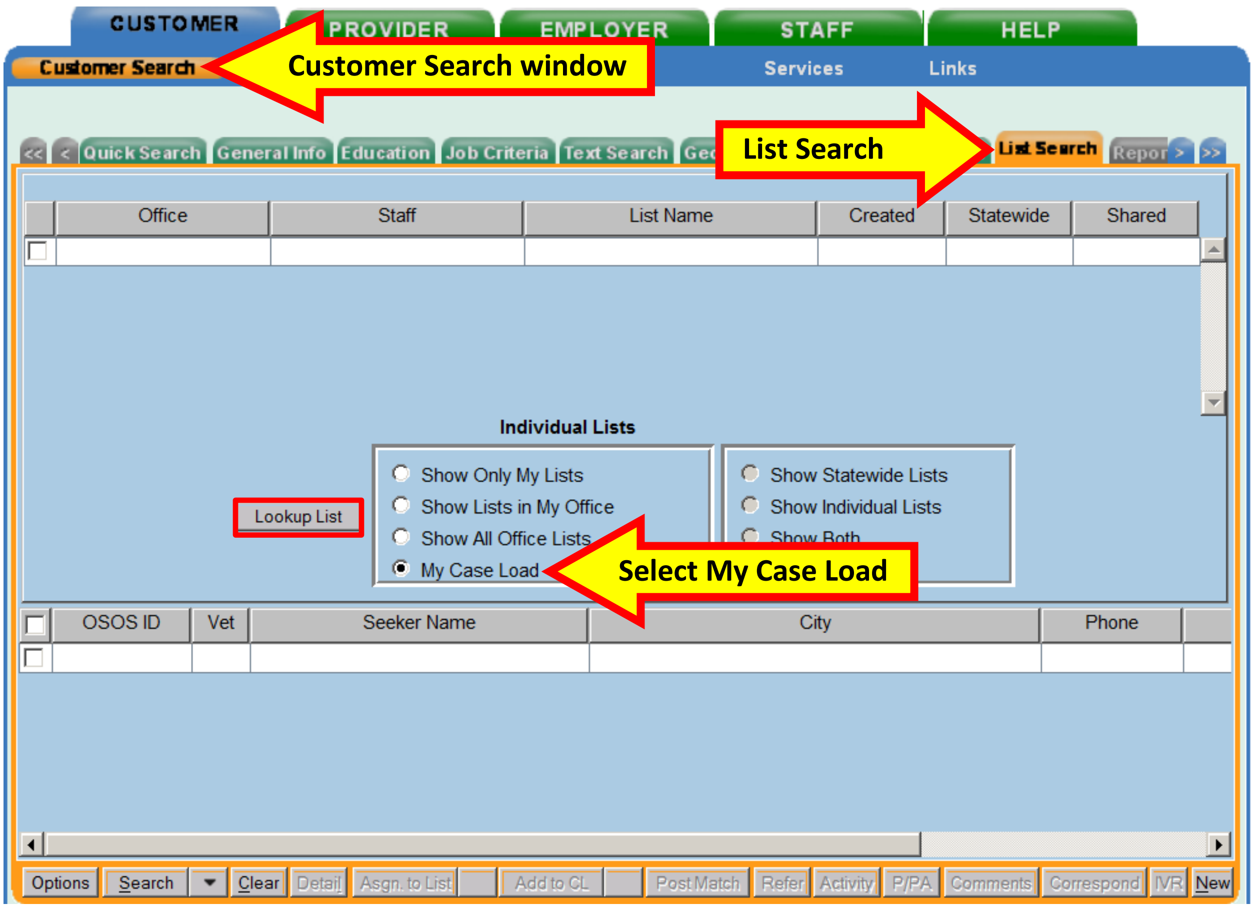
As the information and order are selected, it will appear in the column header.



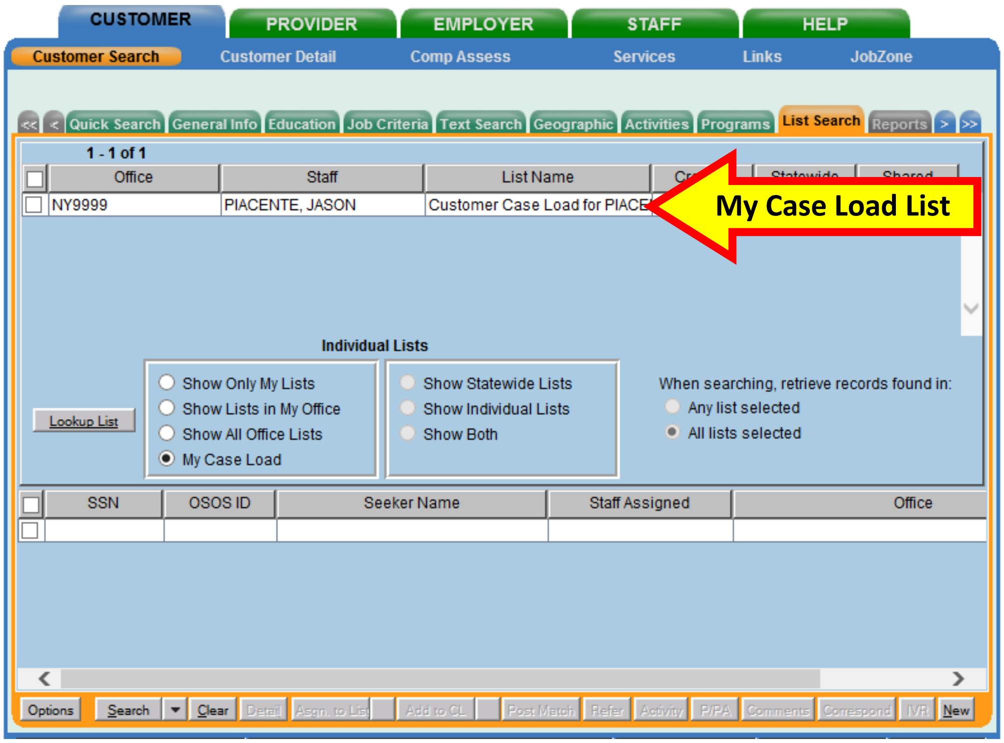
Navigate to the **Customer Search** window and the **List Search** tab.

Select the **My Case Load** option.

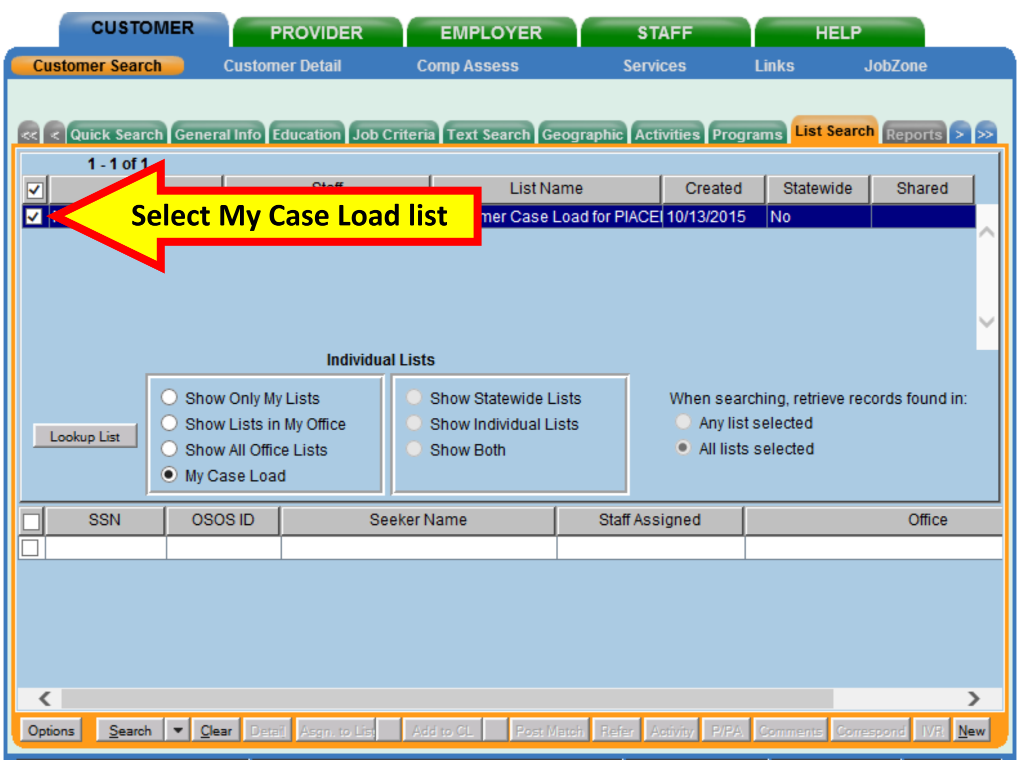
Click the **Lookup List** button.



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



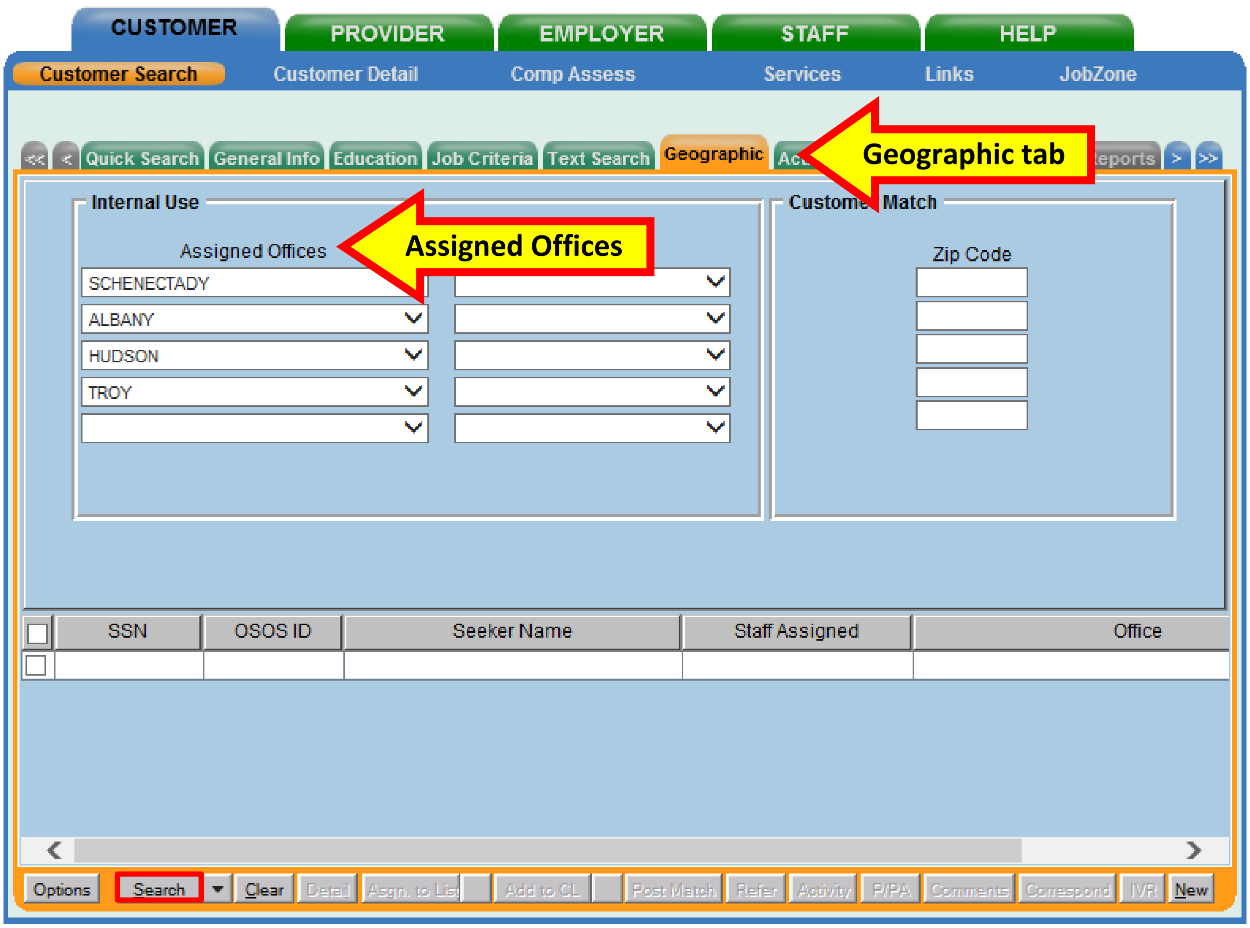
Select the list.



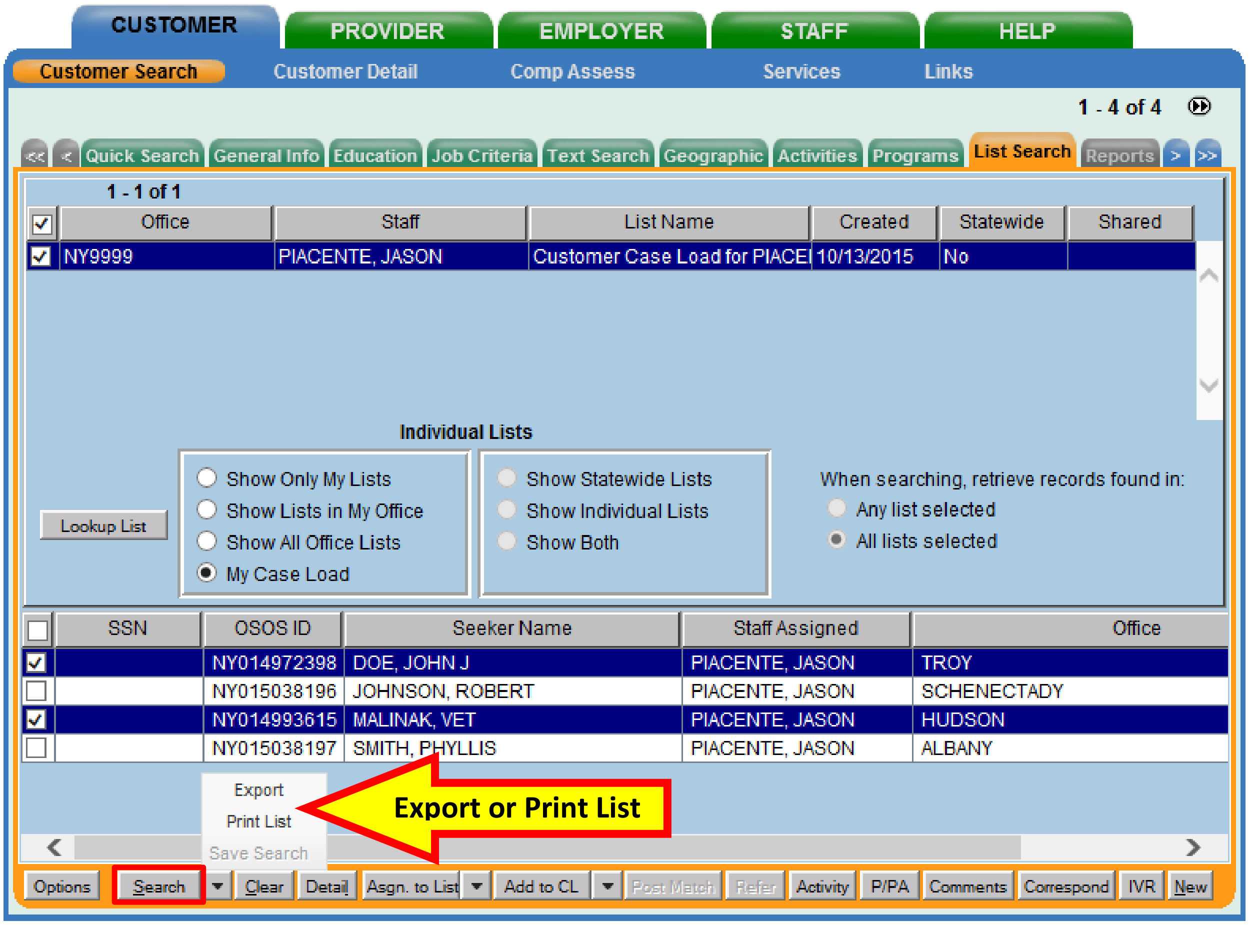
Additional search criterion may be added to reduce the results to a portion of the records in **My Case Load**.

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.



OSOS
One-Stop Operating System



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