Opioid Crisis National Dislocated Worker Grant Training OSOS Guide

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PURPOSE

The purpose of the Opioid Crisis National Dislocated Worker Grant (DWG) is to address the economic and workforce related impacts on communities affected by the opioid epidemic. New York State (NYS) will enable eligible applicants to serve or retrain workers in communities impacted by the health and economic effects of widespread opioid use, addiction, and overdose. Through the Opioid Crisis DWG, the New York State Department of Labor will partner with 12 Local Workforce Development Boards (LWDB) in NYS to provide training and support activities to dislocated workers (including displaced homemakers), individuals temporarily or permanently laid off as a consequence of the Opioid Crisis, a long-term unemployed individual, and self-employed individuals who became unemployed or significantly underemployed as a result of the Opioid Crisis; and to provide training that builds the skilled workforce in professions that could impact the causes and treatment of the opioid crisis, including addiction and substance-abuse treatment, mental health treatment, and pain management.

Employment and training activities must follow one or both of the following approaches: Reintegration of eligible participants who volunteer that they have been impacted by the opioid crisis; or, providing career, training, and supportive services to eligible participants aimed at boosting the number of qualified professionals in fields that can have an impact on the crisis.

OSOS is a case management system designed to record a process in which services are provided to jobseekers and employers. This process must detail an assessment of a customer's situation as it pertains to their search for employment. It must then detail a specific plan of action set in place to provide these services and achieve defined goals. Lastly, the outcome of this plan must be documented to measure its success in achieving the desired goals.

This guide will provide detailed instructions on how to conduct the OSOS data entry for the Opioid Crisis DWG.

For additional information on the Opioid Crisis DWG:

https://wdr.doleta.gov/directives/attach/TEGL/TEGL_4-18.pdf

PARTICIPANT DATA ENTRY

ENTER THE PROVIDER

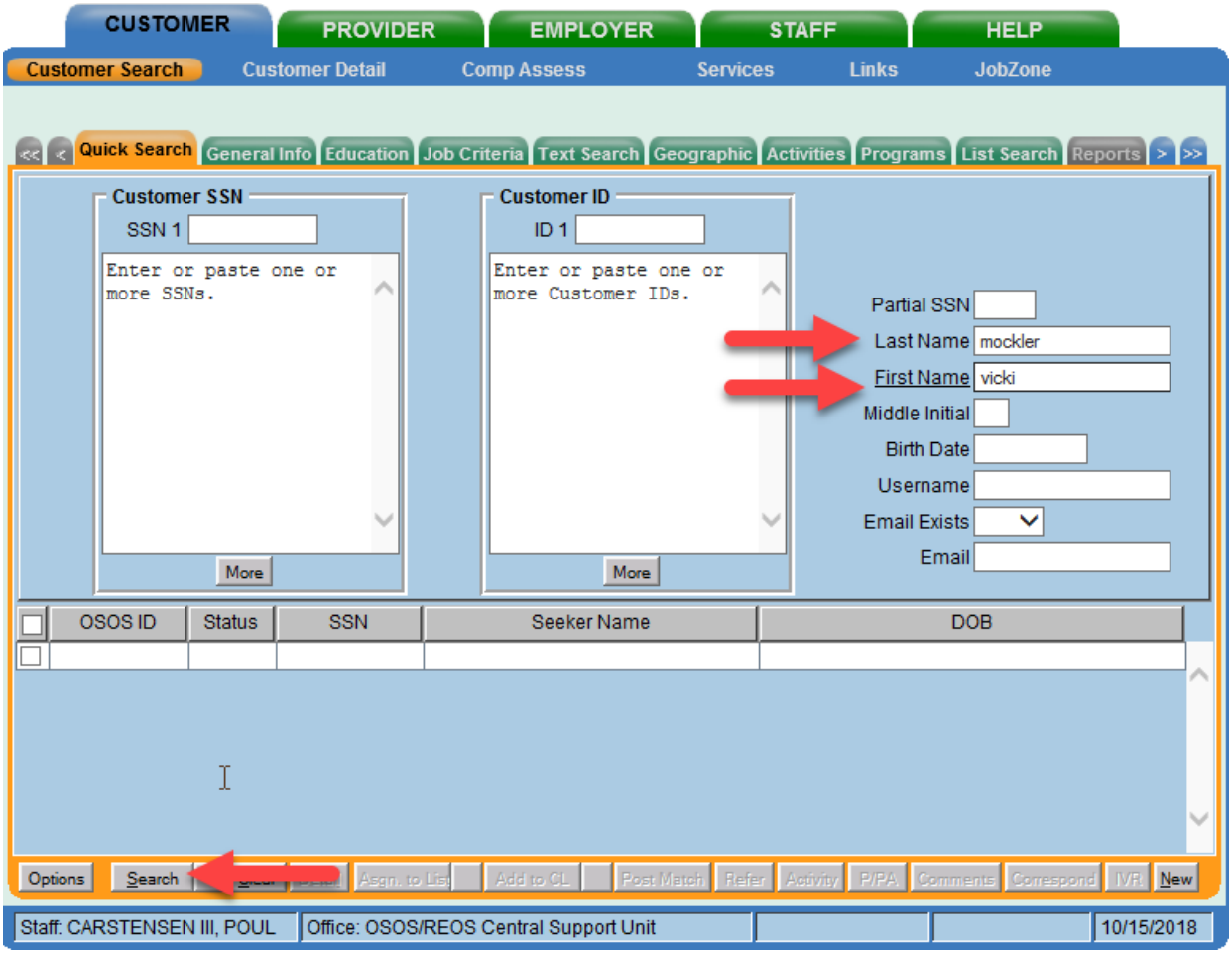
Begin by ensuring that the training provider information is in OSOS. Once this is verified, staff may record participant data relevant to the services being provided. If training provider information is not already in OSOS, it can be entered using the step-by-step instructions found in the OSOS guide located here:

https://labor.ny.gov/workforcenypartners/osos/OSOS-Guide-Creating-Providers-Services-and-Offerings.pdf

CUSTOMER SEARCH

Start by conducting a Customer Search in the **Customer** module, **Customer Search** window, and **Quick Search** tab.

Search for the customer by Last Name and First Name. Once you find the customer's record in OSOS you may use the customer's NY ID number for any subsequent customer search.

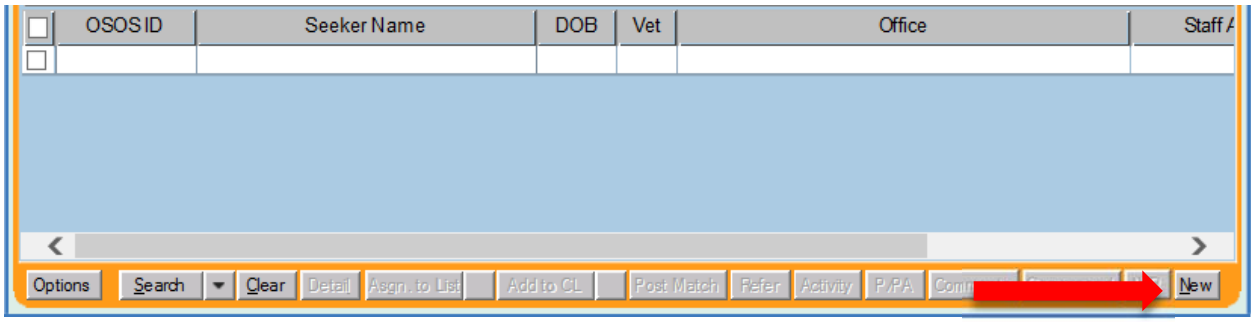


If a customer name search returns multiple records for the same customer, contact the OSOS Help Desk at help.osos@labor.ny.gov or 518-457-6586 to determine which record should be used.

If no matches are found you will need to create a new record for the customer in OSOS, as customers served under this grant must be registered with NYS's Career Centers. Detailed instructions for creating a basic customer record can be found here:

https://labor.ny.gov/workforcenypartners/osos/Creating-a-Basic-Customer-Record-OSOS-Guide-12-10-2018.pdf

To create a new customer record, click **New** at the bottom of the screen and fill in the necessary information in the Customer Detail tabs.



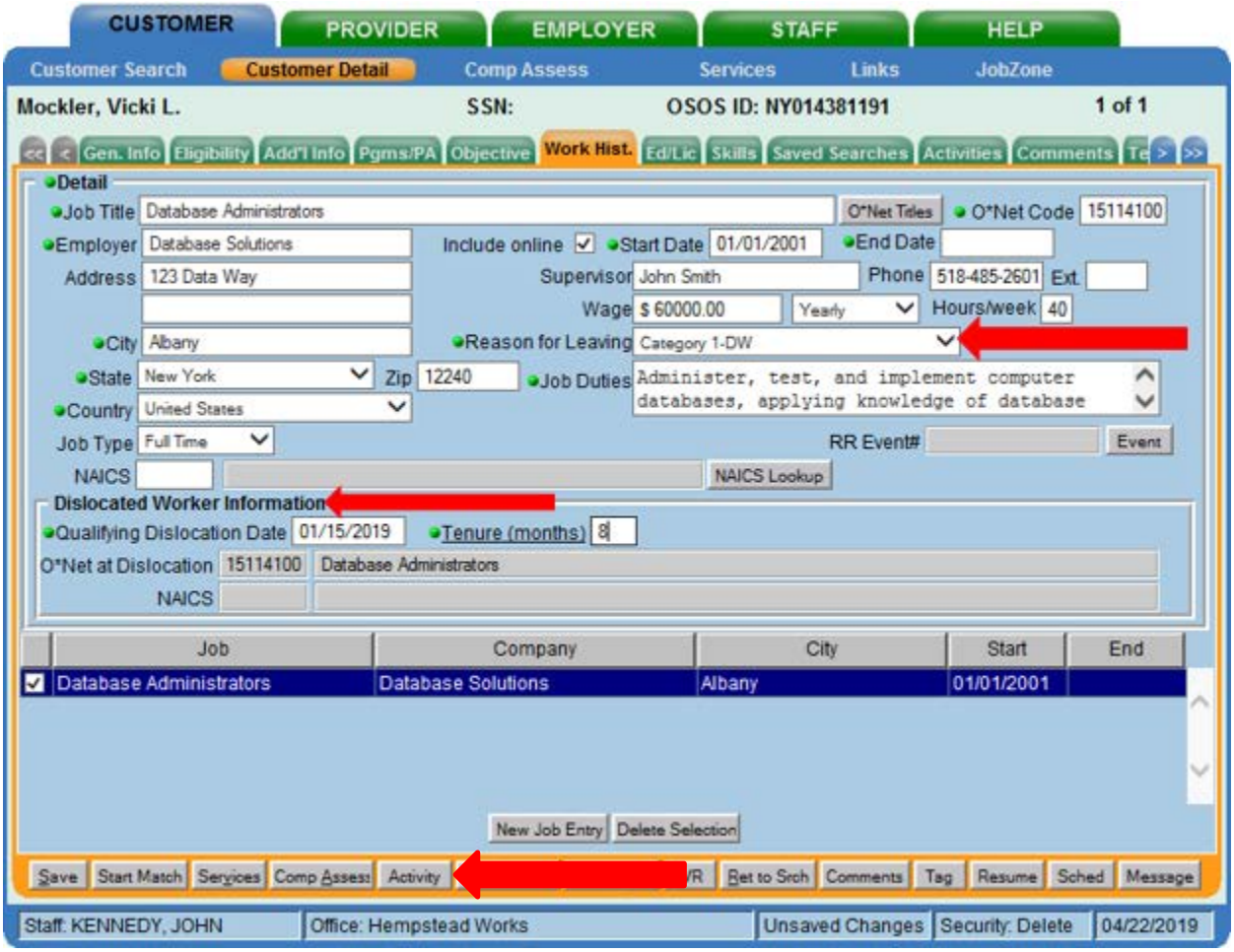
UPDATE THE CUSTOMER RECORD

It is important to note that the services available to customers under this grant are different based on what the customer discloses during their appointment. Customers served under this grant must be dislocated workers. Opioid Crisis DWG funding can only be used to fund trainings in the specific training fields identified to have an impact on the opioid crisis. These fields are as follows: addiction treatment; mental health treatment focused on conditions that can lead to or exacerbate opioid addiction; and pain management services and practices that the applicant demonstrates could help reduce or avoid prescription painkiller addiction. Any dislocated worker can receive training in these fields under this grant.

If a customer discloses that they have been personally impacted by the opioid crisis, not only can they enter training in one of the fields identified above but they are also eligible to seek career and training services in other professions including, but not limited to, medical and health professions encompassed in the Opioid Crisis DWG grant. Training and job placement assistance to aid participants in finding and filling jobs in identified emerging or high-demand sectors are also allowed for customers who reveal that they are or have been impacted by the opioid crisis. To maximize the number of customers served under this grant, staff should inquire about the customer's relationship to the opioid crisis during their appointment if the customer displays an interest in training in a field determined to be in-demand that is other than the fields identified to have an impact on the opioid crisis. Customers do not have to disclose this information. However, staff should explain the benefit of disclosure as it relates to funding the training they are interested in.

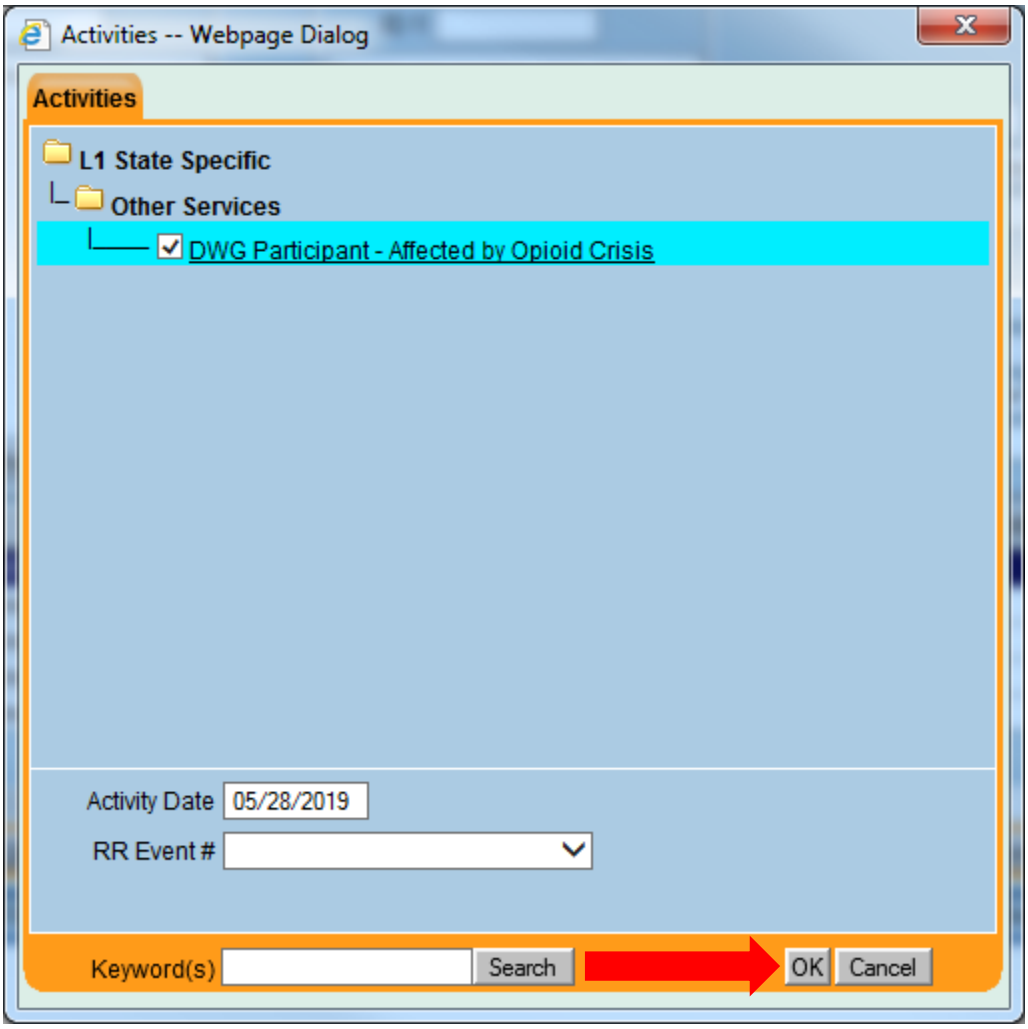
It is imperative that each customer served under the grant be documented as a dislocated worker to receive Opioid Crisis DWG funded services. Following the checklist found at https://labor.ny.gov/workforcenypartners/PDFs/dislocated-worker-osos-checklist.pdf will ensure the customer is eligible. The OSOS fields for documenting Dislocated Worker status can be found in the **Customer** module, **Customer Detail** window, **Work History** tab.

To properly document a dislocated worker, the Work History tab must be completed. Start and end dates must be provided, and Category 2 and Category 6 dislocated workers must have an O*Net code. In addition, each category of dislocated worker will have different required fields depending on the category selected.



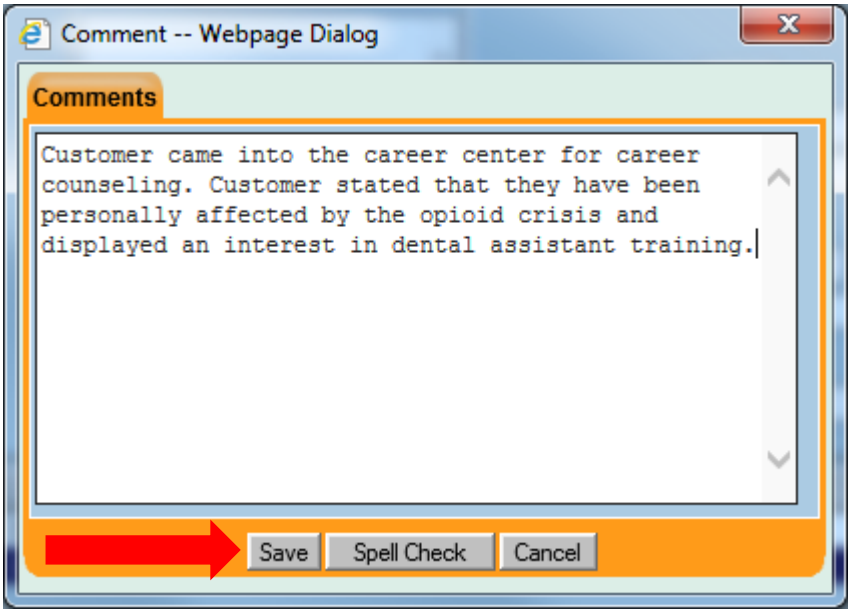
If the customer discloses that they have been personally affected by the opioid crisis, staff must take the DWG Participant- Affected by the Opioid Crisis activity. To select this activity, click on the gray **Activity** button located at the bottom of the screen.

Then select the **L1 State Specific** folder. From here, click on **Other Services** and select **DWG Participant – Affected by Opioid Crisis**. This activity should **only** be taken when the customer reveals that they have been personally affected by the crisis. Now click **OK** at the bottom of the Activities Webpage Dialog box.



Once the Activities Webpage Dialog box closes, click the gray **Save** button located at the bottom of the **Customer Detail** screen.

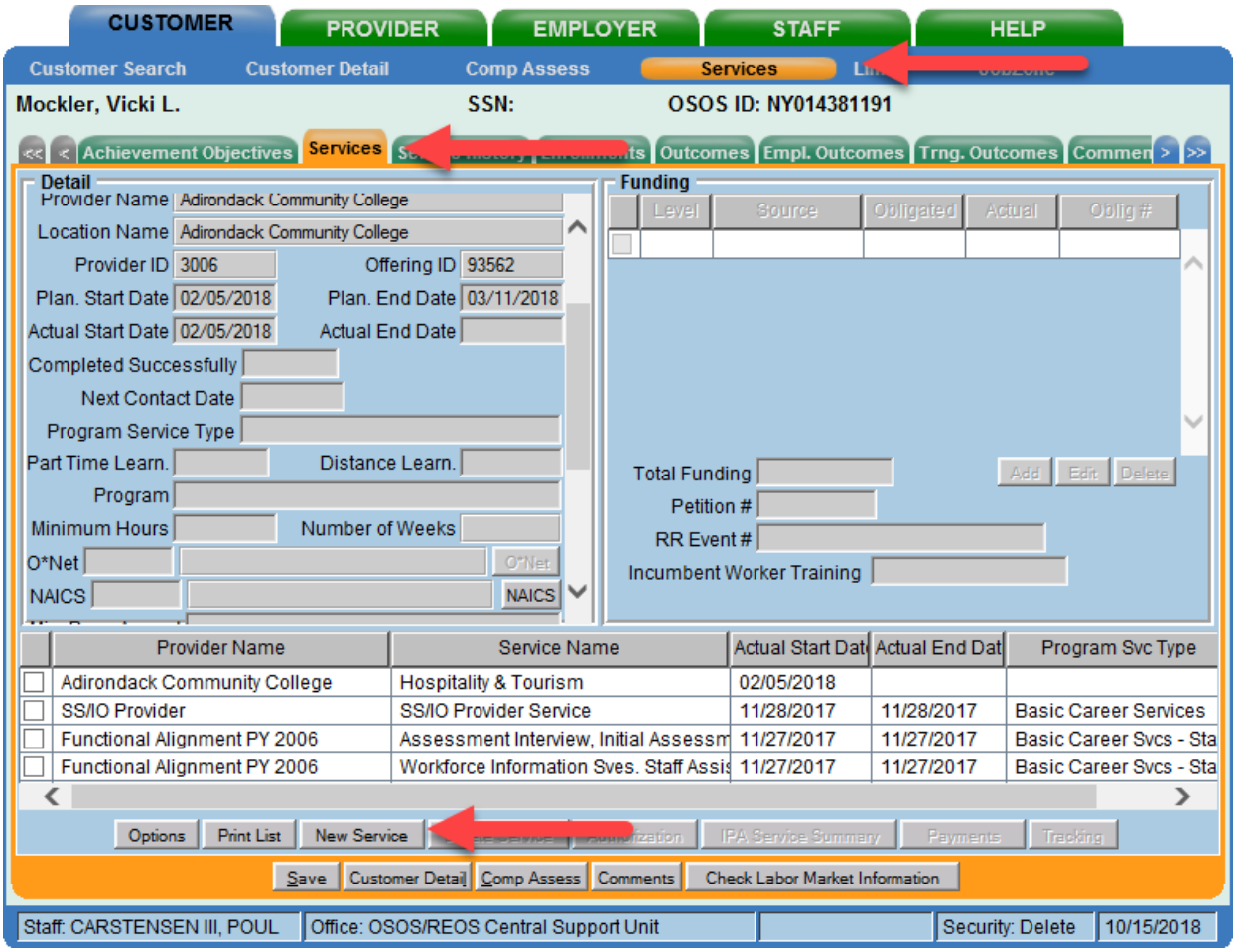
In addition to documenting dislocated worker status in the **Work History** tab and taking the OSOS activity, staff must also record the customer's disclosure of being affected by the opioid crisis in an OSOS comment. This comment should only outline that the customer disclosed they have been affected by the opioid crisis and must not contain any personal or health related information. After recording the comment, click **Save** at the bottom of the screen.



RECORD THE SERVICE

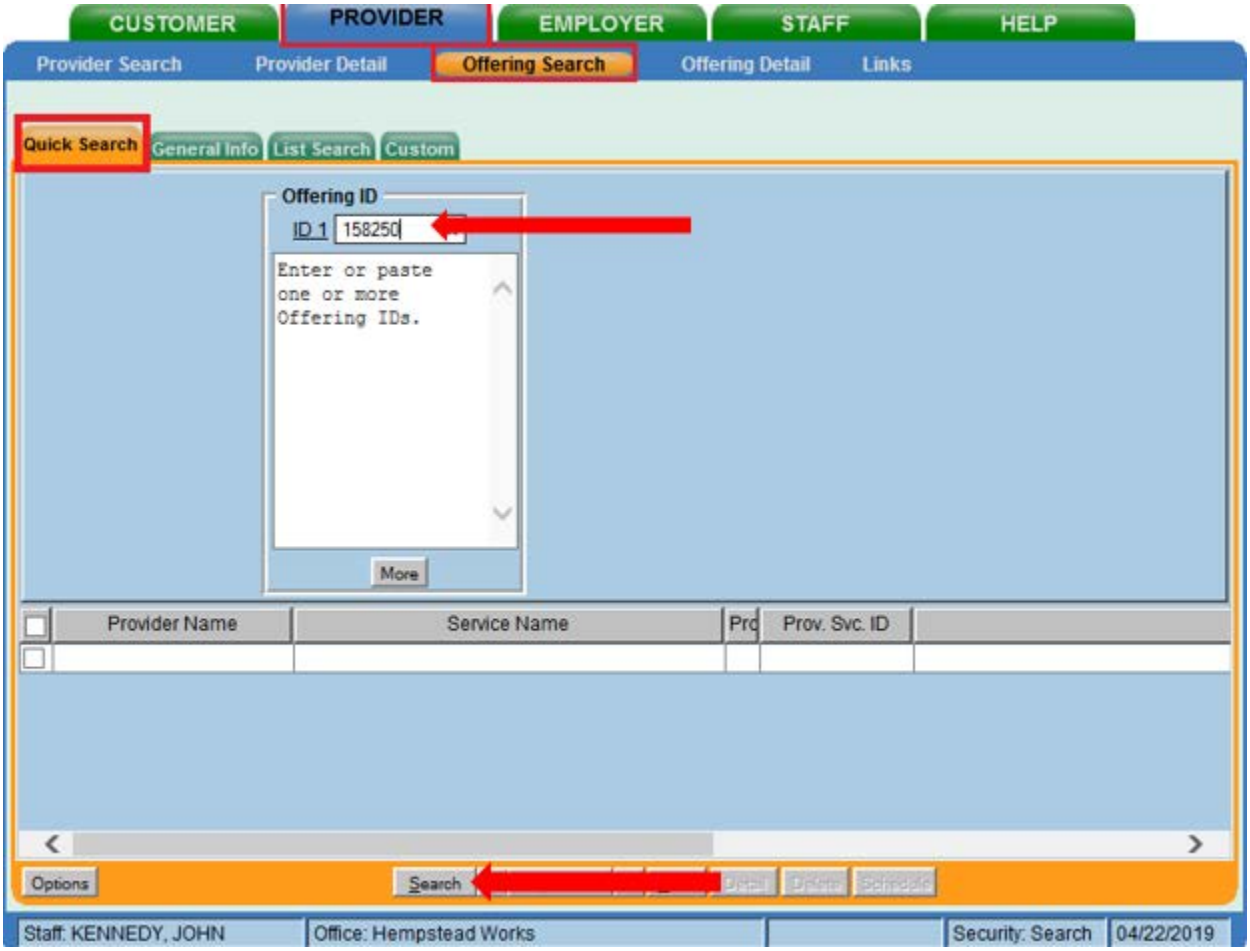
Once you have created/updated the customer's record, documented DW status, and taken the appropriate activity if applicable, proceed to the Services Window to enter services that are being provided to the customer.

Click the **New Service** button at the bottom of the screen.



After you click the **New Service** button, OSOS will automatically navigate to the **Provider** module. Within the **Provider** module, OSOS will navigate to the **Offering Search** window, **Quick Search** tab.

If you know the **Offering ID** number, type it in the search box and click **Search**.

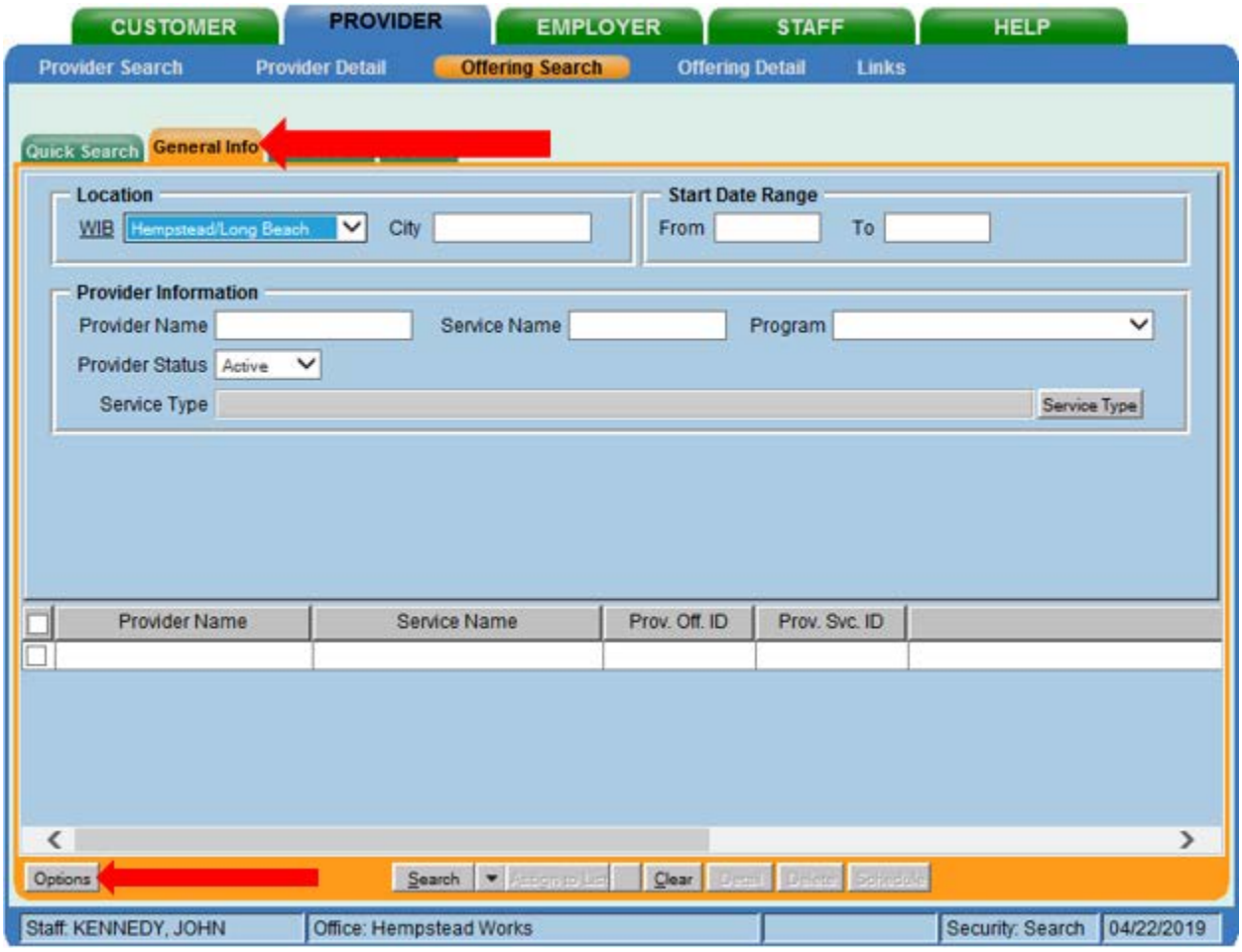


If you do not know the **Offering ID**, click the **General Info** tab to search by other criteria.

For Occupational Skills Training to be funded through the Opioid Crisis DWG, the training provider/service must have been auto-loaded in OSOS from the Eligible Training Provider List (ETPL).

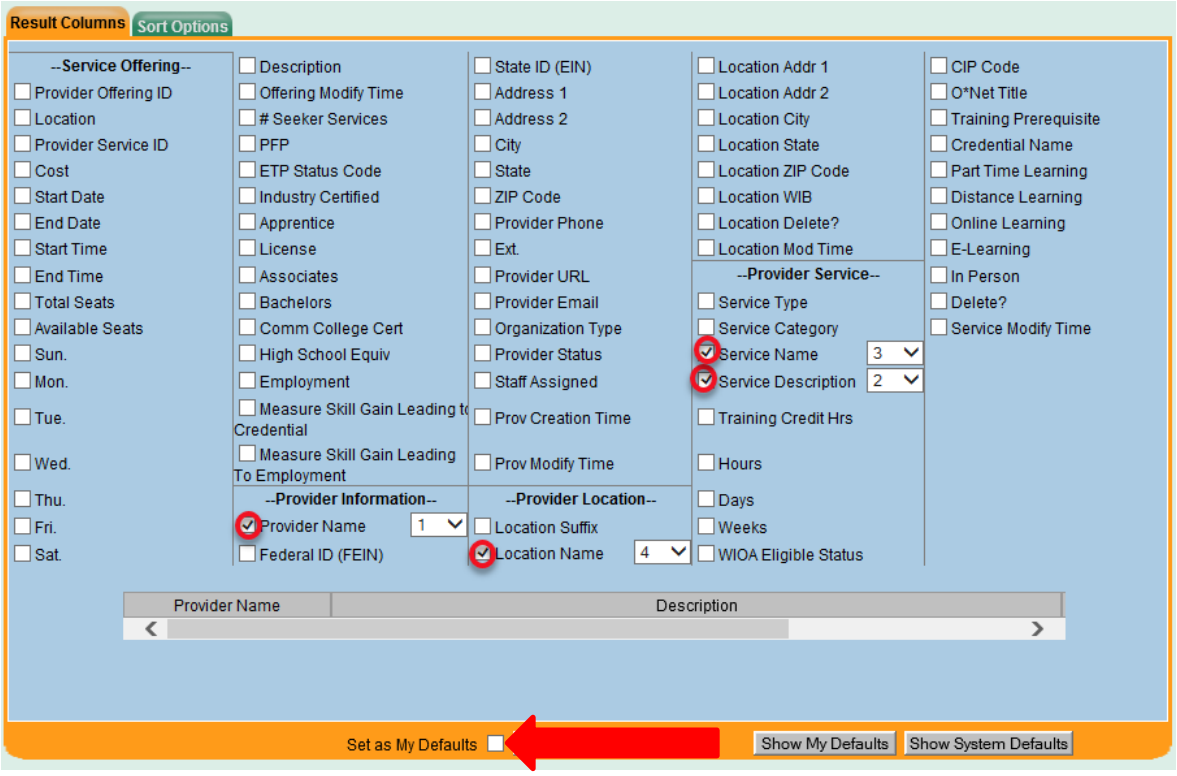
To help you determine whether a provider has been auto-loaded from the ETPL, the search options in OSOS should be adjusted before conducting the search.

To do this, click on **Options** at the bottom of the screen.



A pop-up window will appear containing a list of categories you can choose to display for your search results. Select the following four categories: Provider Name, Service Name, Location Name, and Service Description. The Service Description is especially important because this field will indicate if the service was autoloaded from the ETPL.

Uncheck any other categories that may already be checked and click **Save**.



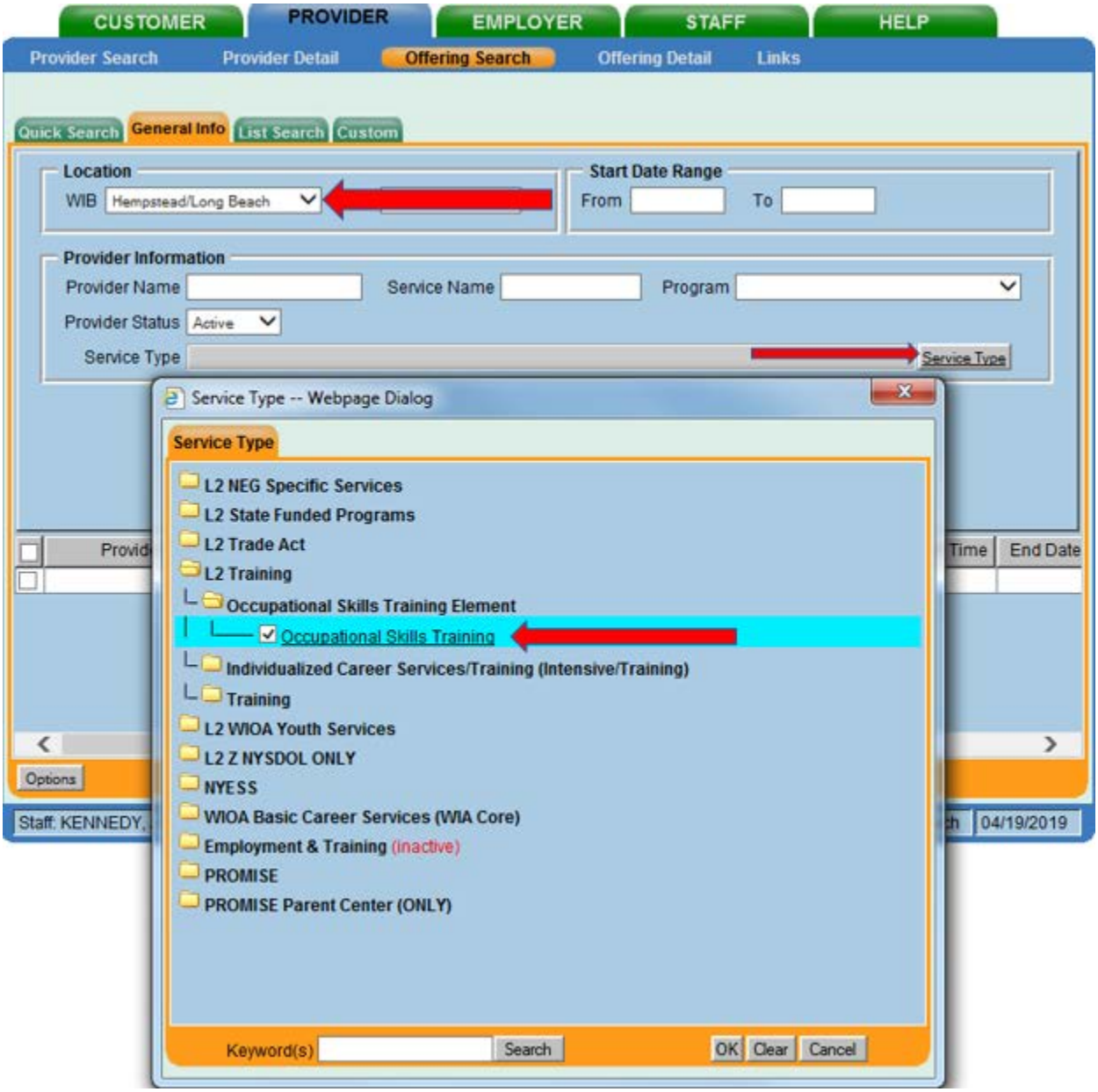
*You can check the box to "**Save My Defaults**" before you save so that you do not have to set these options each time you conduct a search.*

Now that the options have been customized, select the **WIB.**

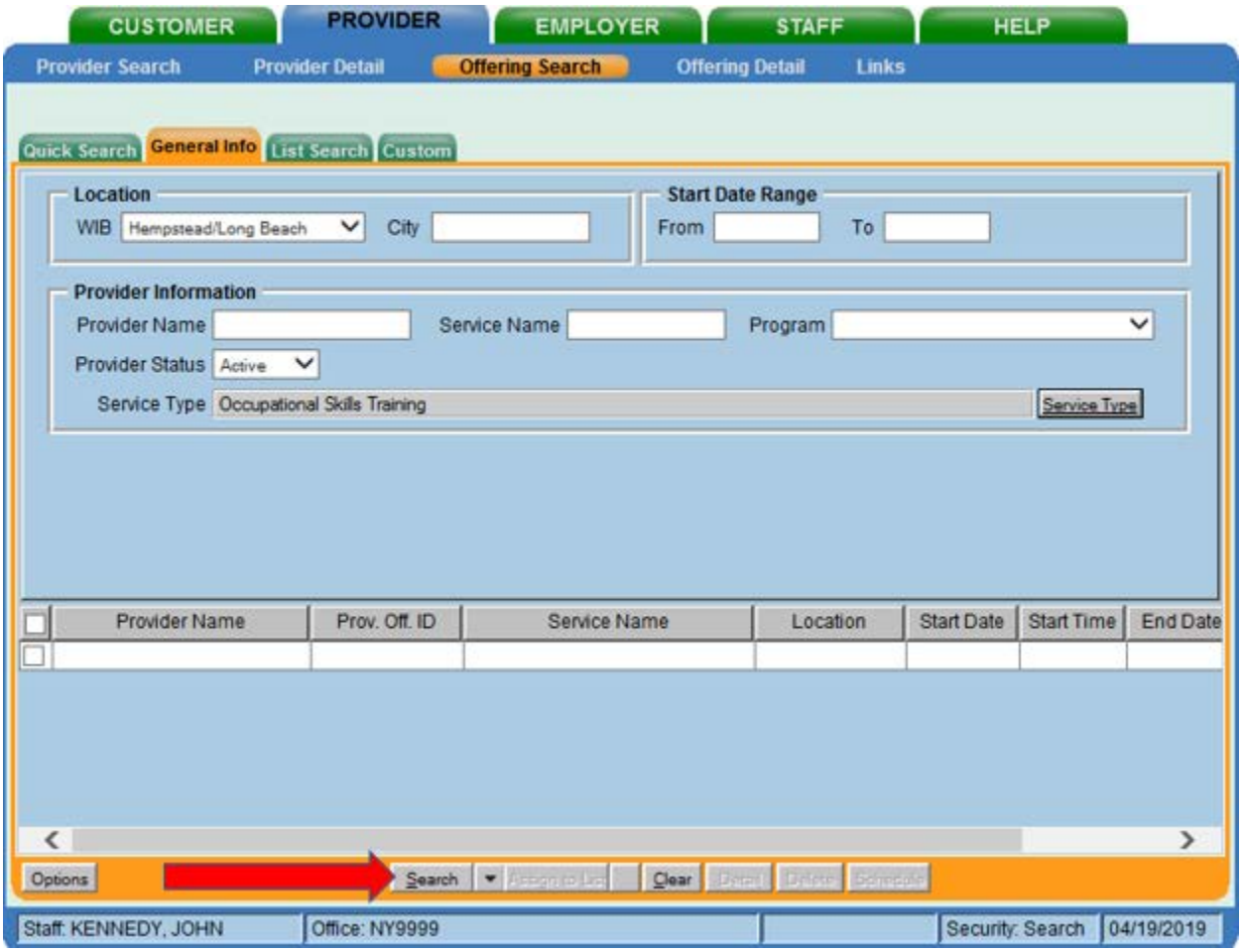
Enter any known information in the available data fields. OSOS will allow you to enter a partial name for the **Provider Name** and **Service Name** fields.

Then, click **Service Type**.

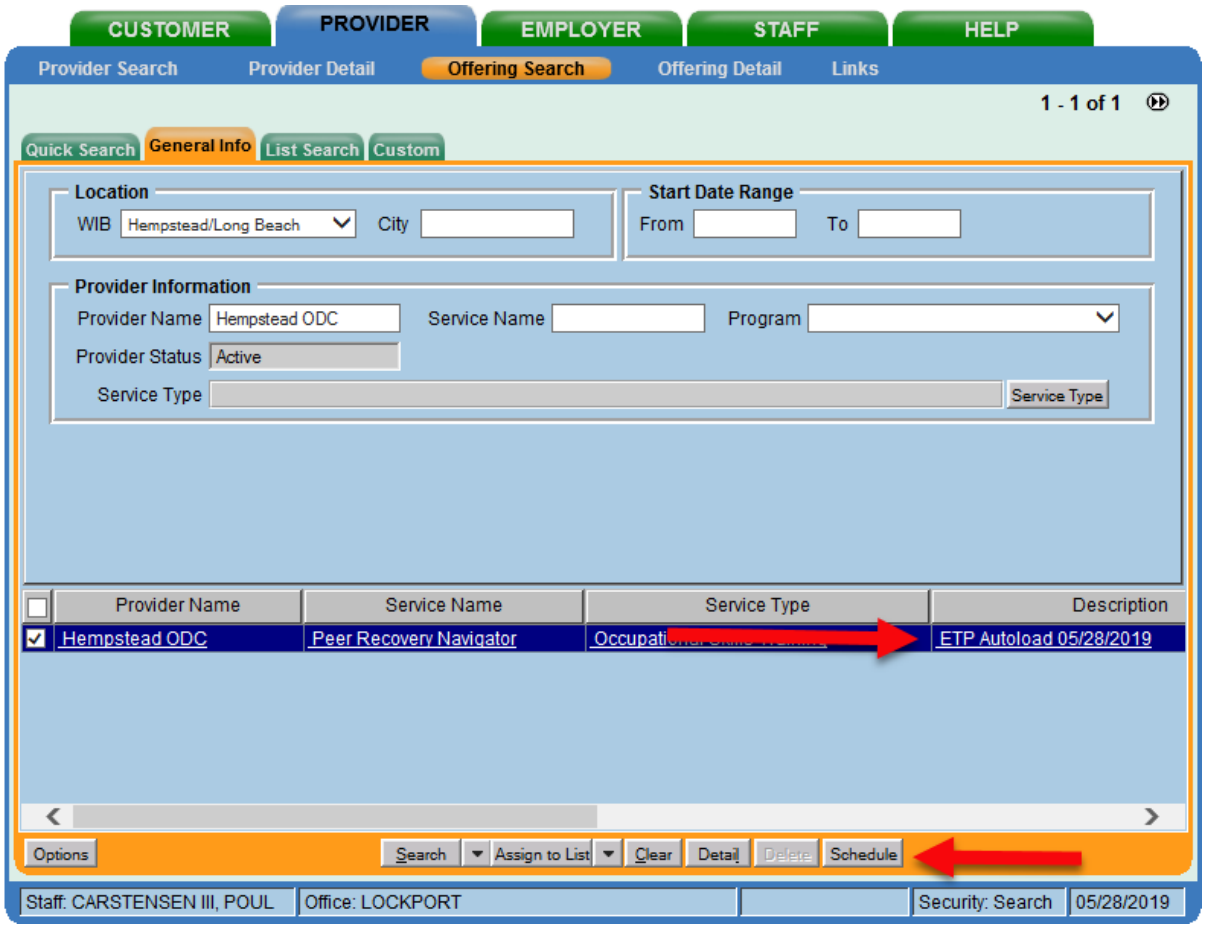
Select the appropriate **Service Type** from the pop-up dialog box. Click **OK.**



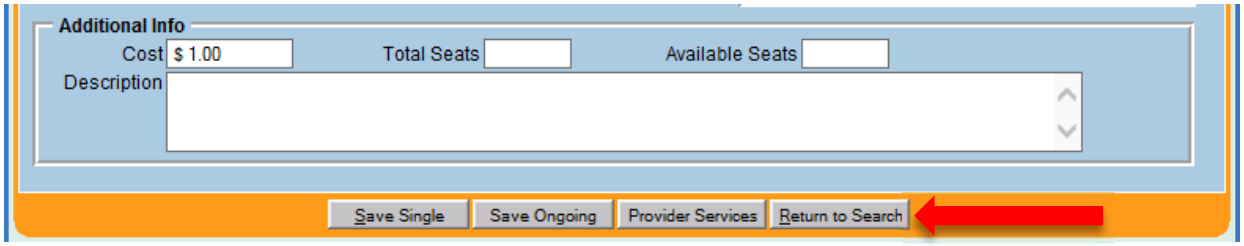
Once the search criteria have been entered, click **Search**.



The results will display in the bottom half of the screen. Select the appropriate Provider/Service from the results and click **Schedule.**

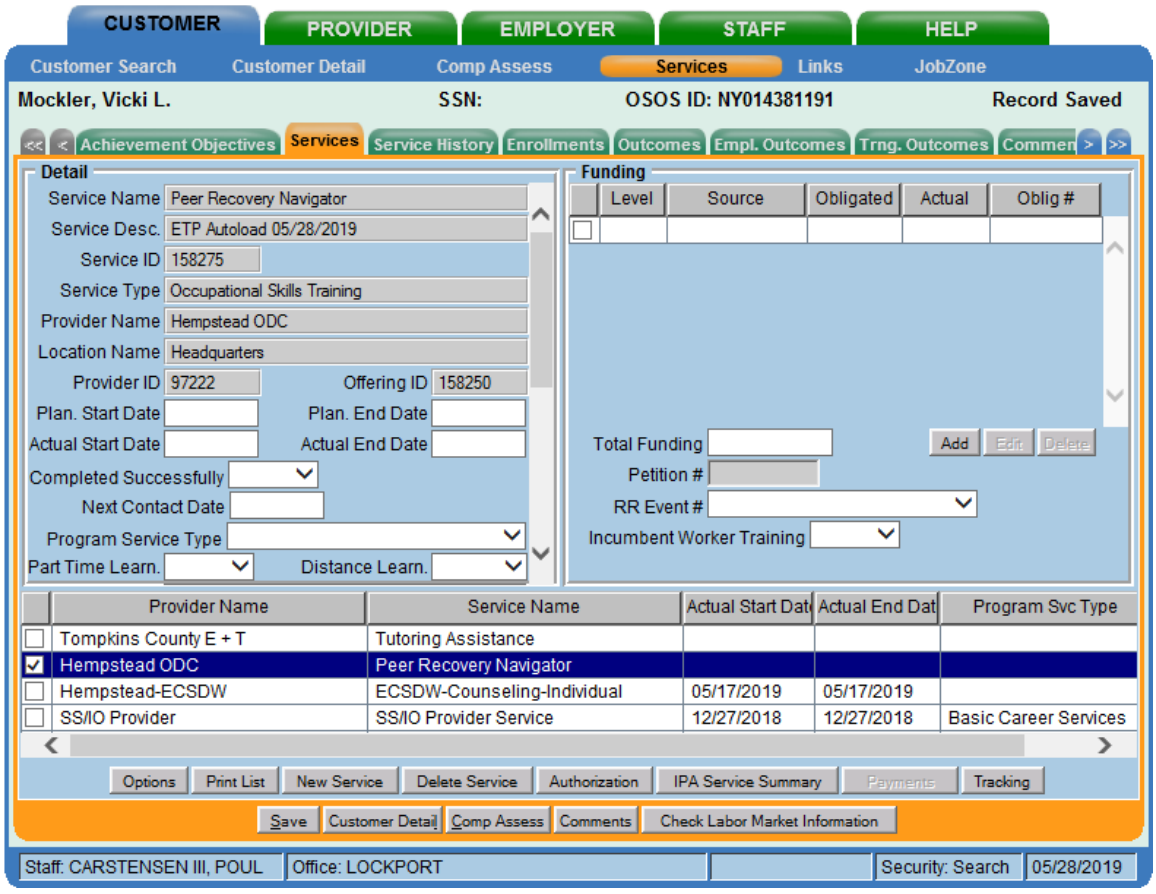


*If your search only returns one result, OSOS will navigate directly to the **Offering Detail** window for that provider. Click the **Return to Search** button at the bottom of the screen to navigate back to the **General Info** tab. This will allow you to schedule the service.*



By clicking **Schedule**, the service will be added to the customer's record, and OSOS will automatically navigate to the **Services** tab.

Select the service from the list in the bottom half of the screen and complete the following data entry in the **Detail** window (left hand side).



Plan. Start Date – Enter the date on which the service is planned to begin.

Plan. End Date – Enter the date on which the service is planned to end. Enter the same date you entered for Plan. Start Date if it is a one-day service.

Actual Start Date – Enter the date on which the service began

Actual End Date – This field can be left blank until the service ends. If the service is a one-day service, enter the same date that you entered in the Actual Start Date field.

Next Contact Date – Enter a date on which to follow up with the participant. This date should be within 90 days of the first service to verify the program status and prevent the participant from exiting the enrollment.

Program Service Type – Select the appropriate program service type corresponding to the type of service.

O*NET – The O*Net code must be entered for a training service. If you do not know the O*NET code, refer to O*NET Titles in OSOS Guide.

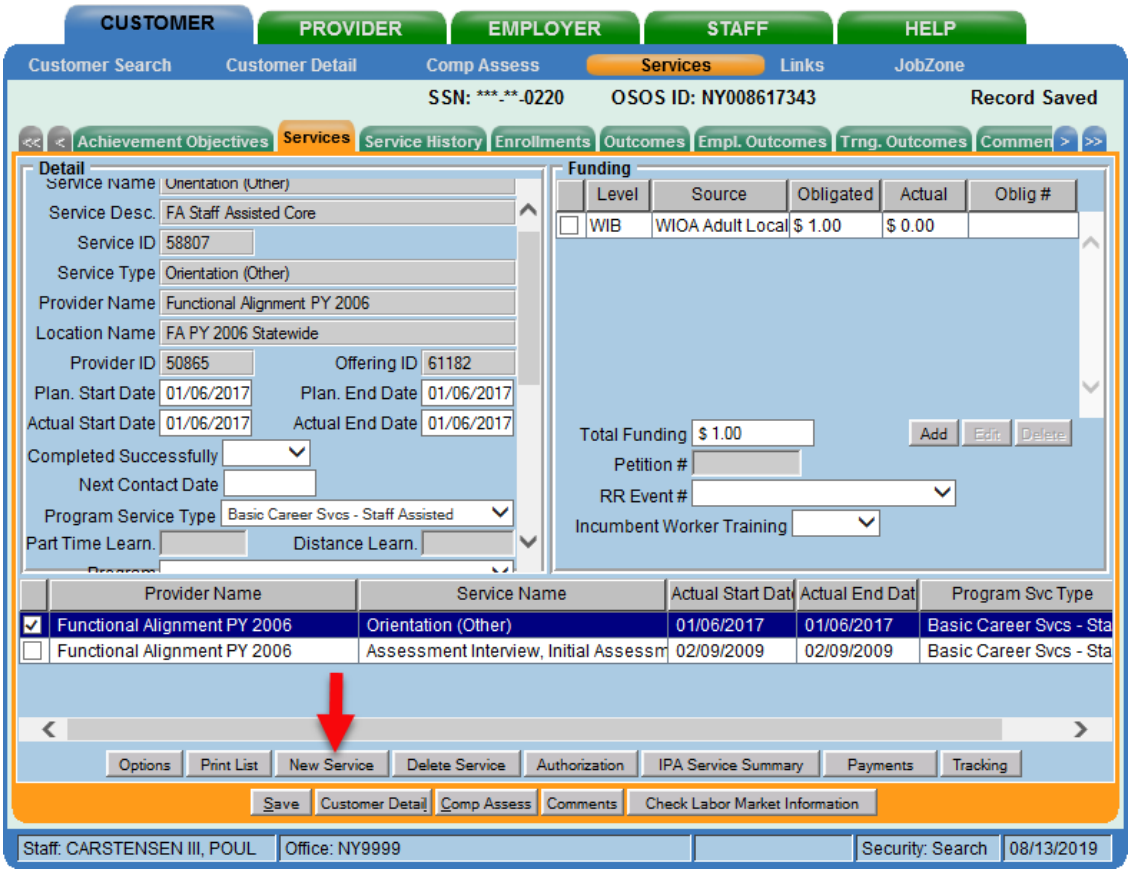
Staff Assigned—Click the "**Change**" button to enter the staff assigned to this participant. You may choose the down arrow and select "Assign to Me" if you are the staff member assigned to this participant.

WIB Assigned, Agency, Office – These fields will auto load information attached to the service. If the information is incorrect, click the **Change Office** button to update.

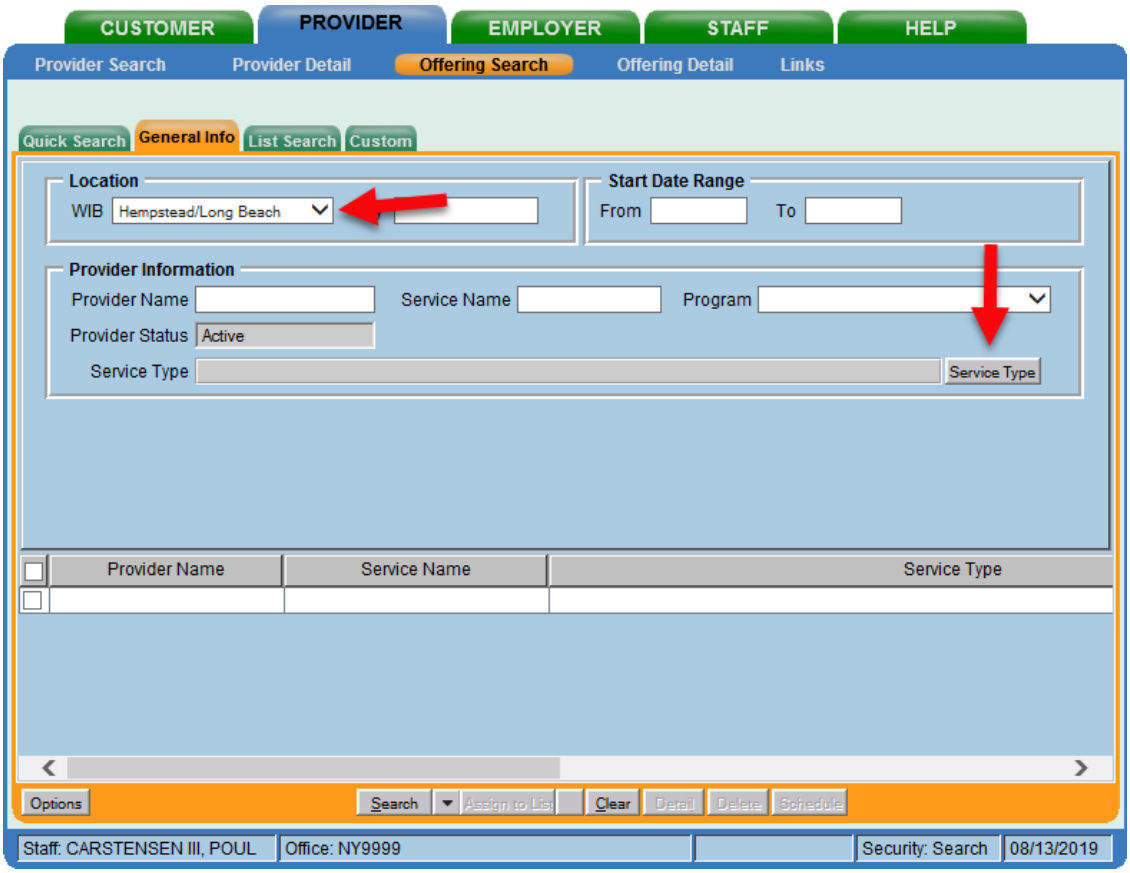
TEMPORARY DISASTER EMPLOYMENT

If a customer is placed in employment that is the result of temporary disaster relief in combating the opioid crisis, staff should enter the service as follows:

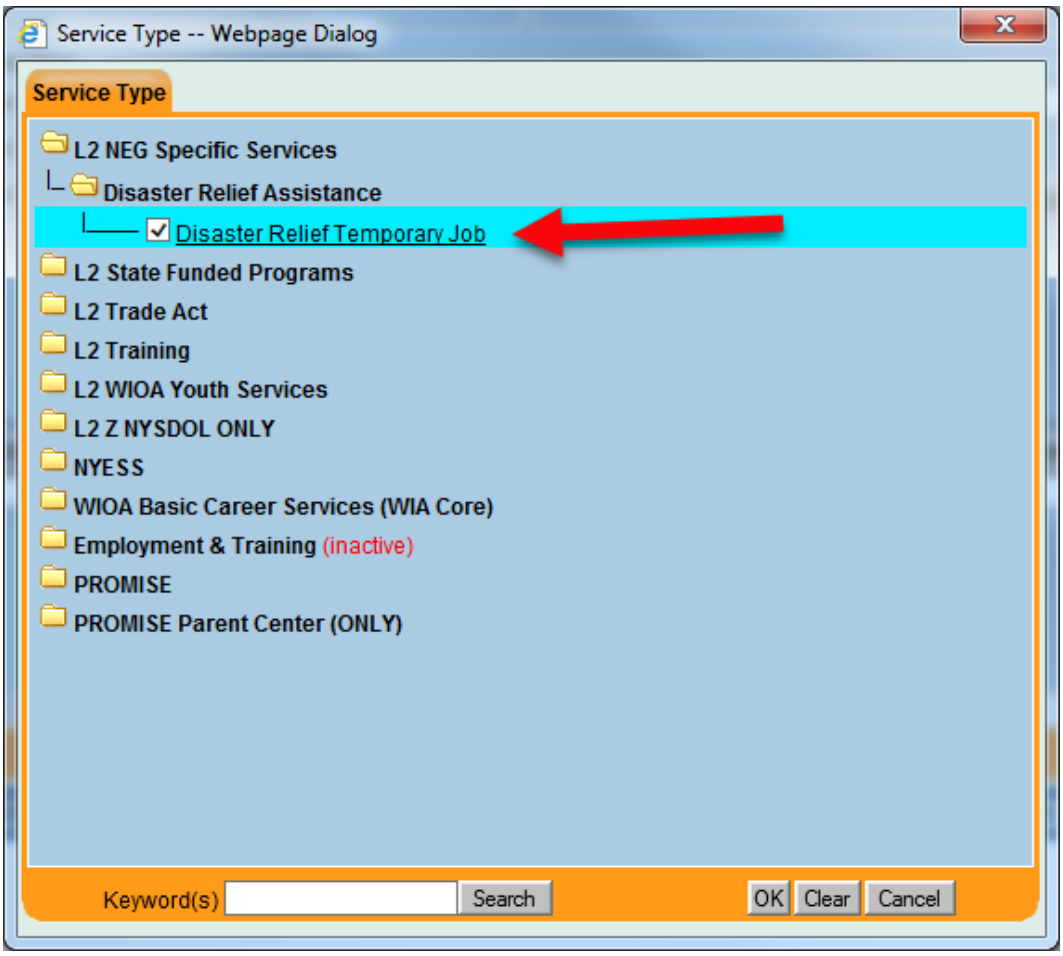
Start the scheduling process by clicking the **New Service** button at the bottom of the **Services** tab.

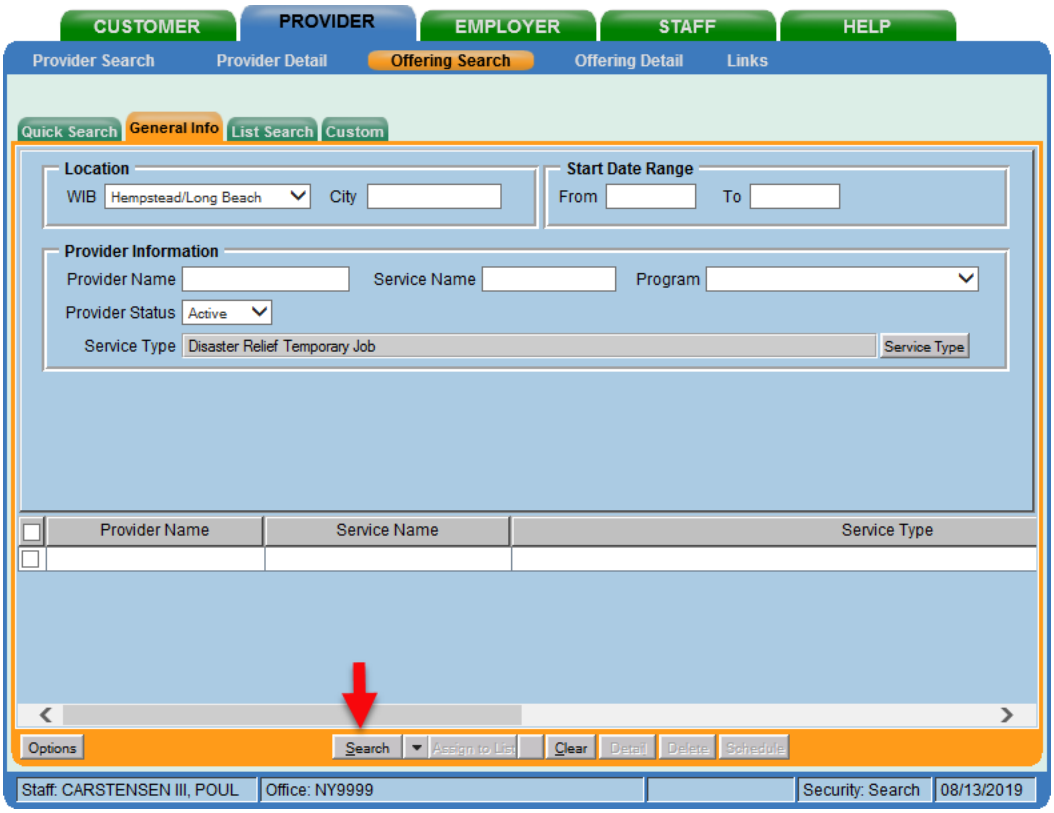


In the **Offering Search** screen, select the proper WIB and click the **Service Type** button.

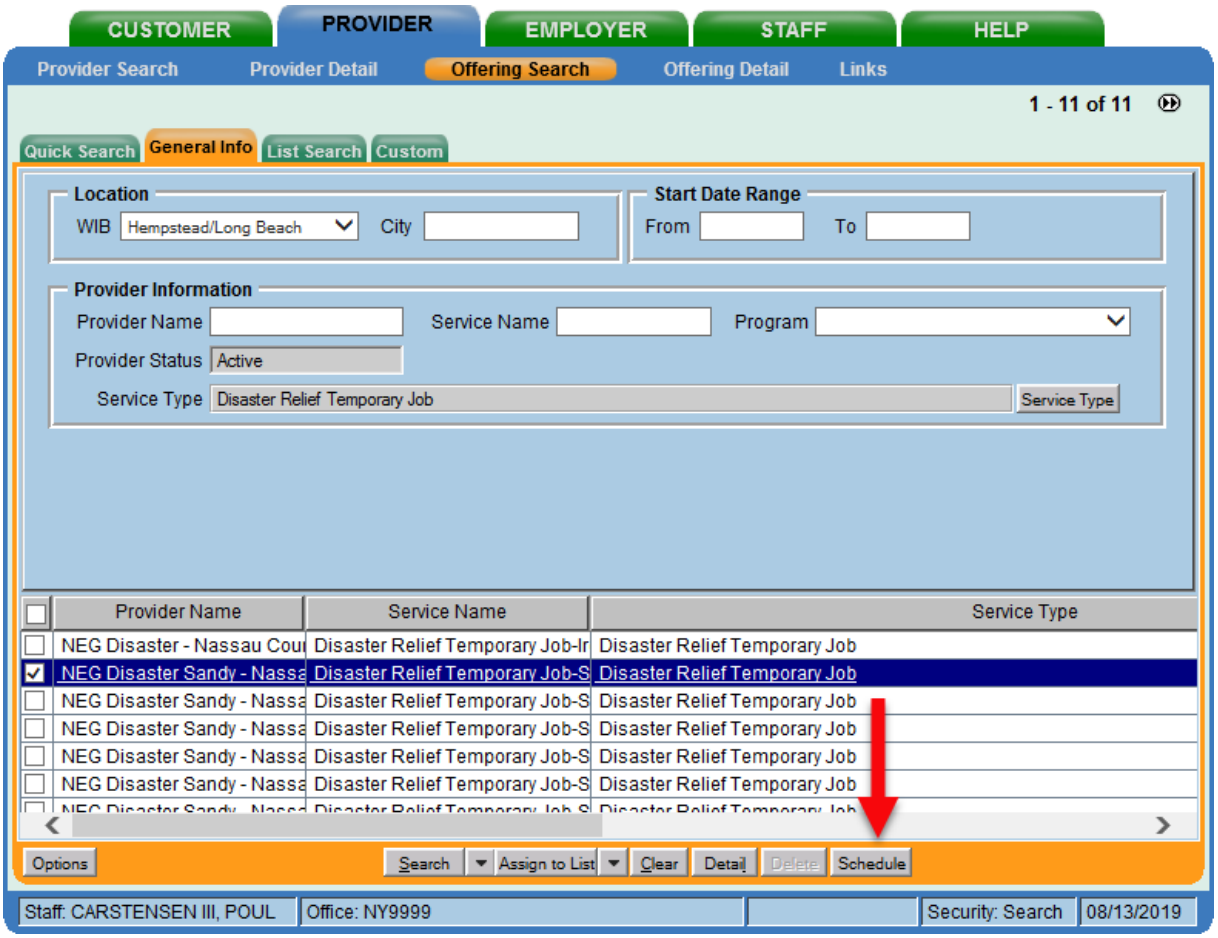


From the **L2 NEG Specific Services** category, select the **Disaster Relief Assistance** folder and check the **Disaster Relief Temporary Job** service type. Hit Search to return results.


Service Type -- Webpage Dialog
Service Type
L2 NEG Specific Services
Disaster Relief Assistance
Disaster Relief Temporary Job
L2 State Funded Programs
L2 Trade Act
L2 Training
L2 WIOA Youth Services
L2 Z NYSDOL ONLY
NYESS
WIOA Basic Career Services (WIA Core)
Employment & Training (inactive)
PROMISE
PROMISE Parent Center (ONLY)
Keyword(s)
Search
OK
Clear
Cancel



Choose the correct offering and hit **Schedule.** This will bring OSOS back to the **Customer** module.

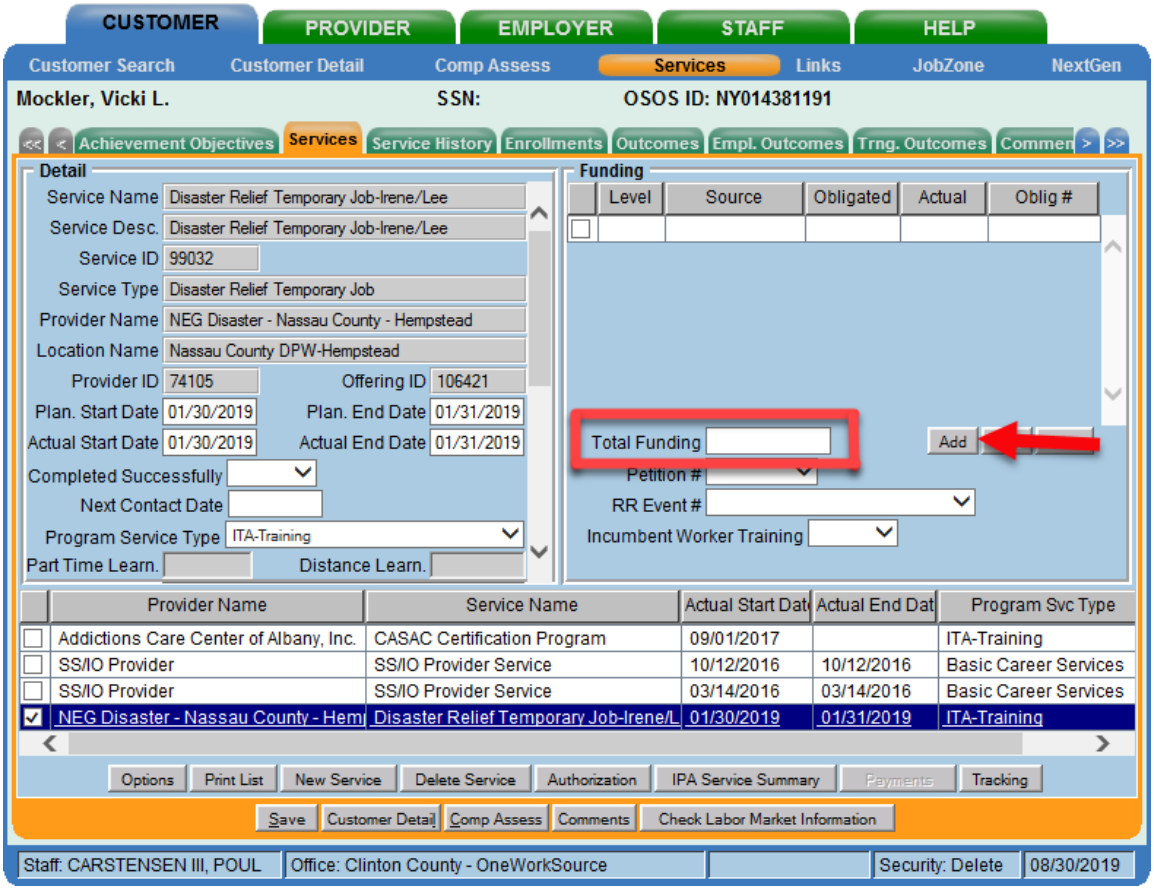


ADD FUNDING

Next, complete the **Funding** section (right hand side) for the service.

Please note that if activities were previously documented and now appear in OSOS as functionally aligned services, staff are not required to reenter them as a new service to attach Opioid Crisis funding. Rather, staff should remove the Dislocated Worker funding associated with the functionally aligned service and replace it with Opioid Crisis DWG 2018 funding.

To do this, enter $1.00 in the **Total Funding** field.

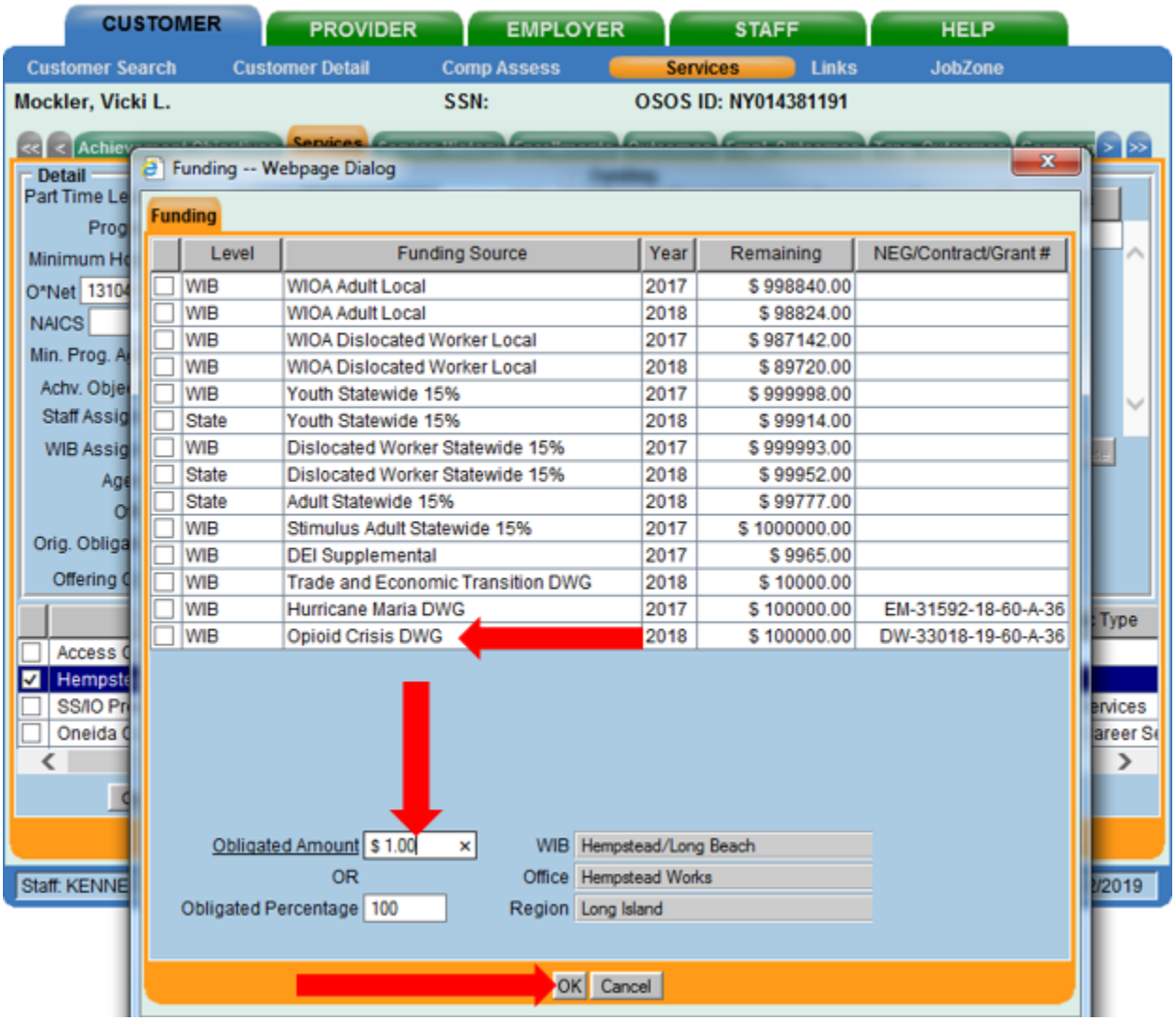


Click the **Add** button.

OSOS is not used as a financial tracking system. It is only used to track programmatic services provided. For this reason, the $1.00 entry acts as a placeholder so that the system will designate a funding source to be attached to the service. This allows the system to track services provided under this grant.

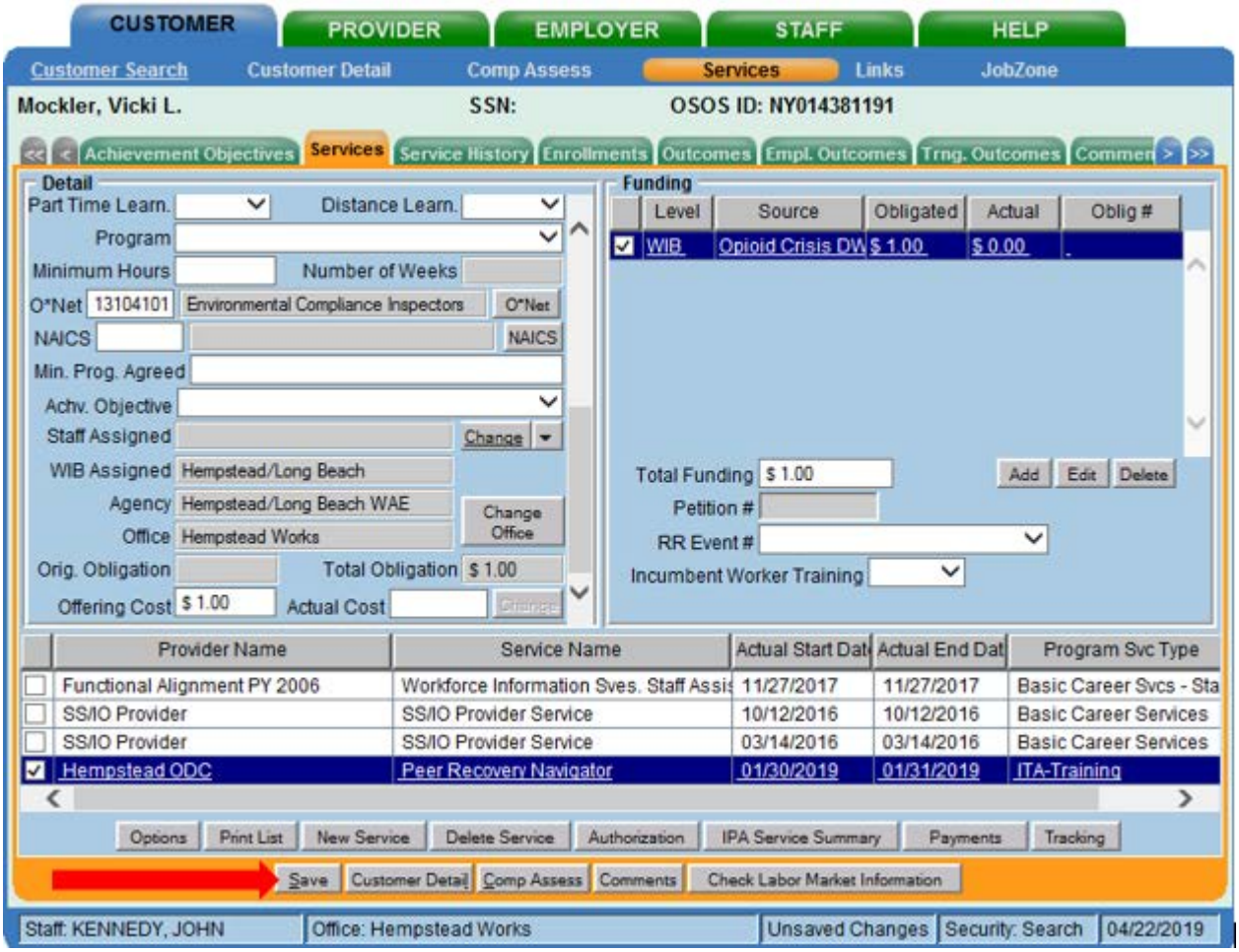
After you click **Add**, a pop-up window will appear with a list of funding sources.

Check the box next to **Opioid Crisis DWG** to select that funding source. Enter **$1.00** in the **Obligated Amount** field and click **OK.**



The funding will now appear in the **Funding** section on the right-hand side of the screen.

Click **Save** at the bottom of the screen.



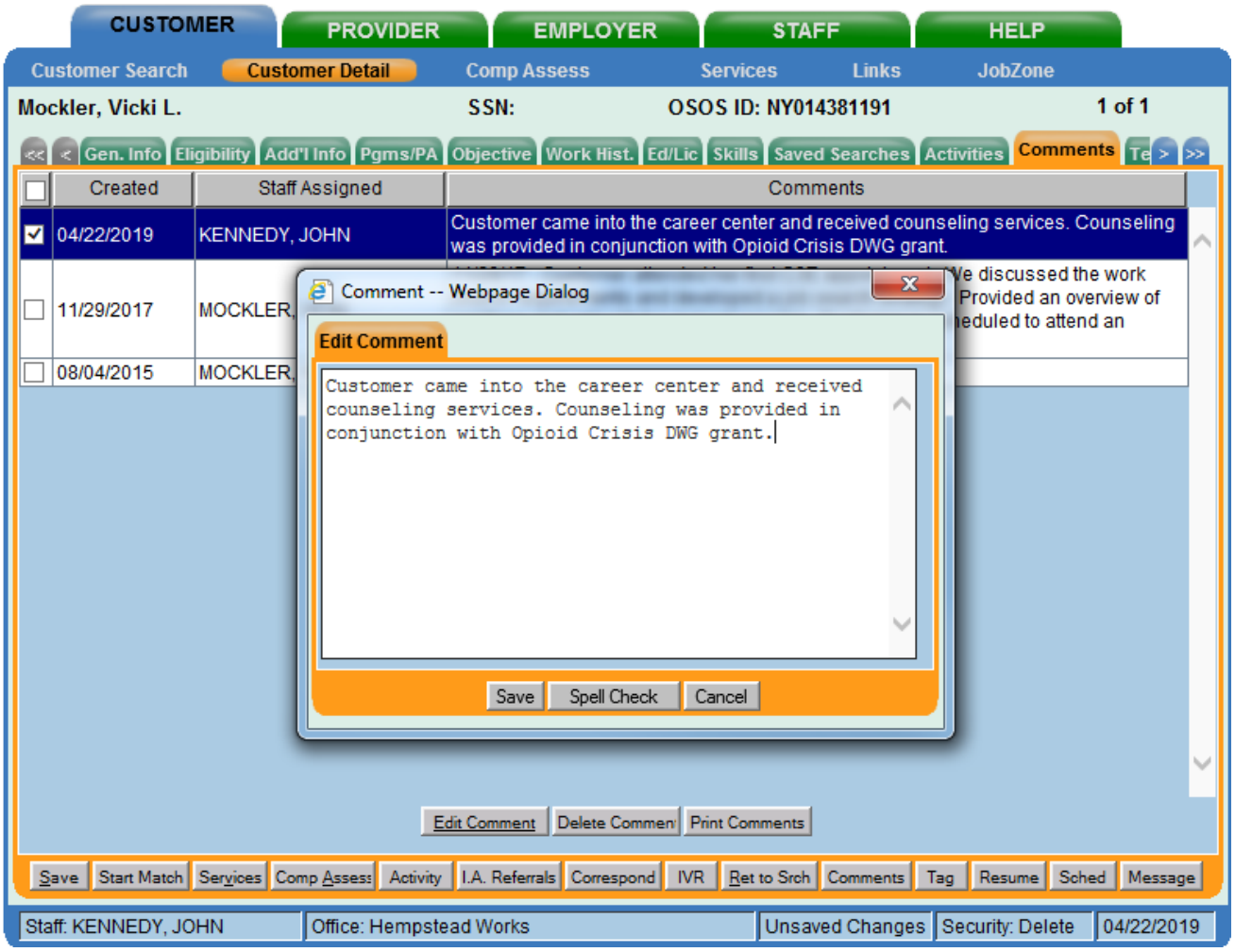
*The service must be closed when it has ended. To close a service, navigate to the **Customer** module, **Services** window, **Services** tab. Select the service that must be closed. Then enter the end date for the training service and click **Save**. The service is now closed.*

ENTER COMMENTS

Comments are used to record case management notes. All users should record comments, details about services, and case notes that concern the customer being served.

Click on the **Comments** button at the bottom of the **Customer Detail** window. The **Comment Webpage Dialog** box will appear. Enter the comment and click the **Save** button on the Webpage Dialog box.

The comment will then appear listed on the **Comments** tab next to the date the comment was entered. Remember to save the entire customer record when you are finished entering comments.



ENTER OUTCOMES

When working with customers and providing services under the Opioid Crisis DWG, training and employment data entry must be completed in the same manner as it is entered for WIOA customers receiving funded services. All training and employment outcomes must be documented in the Training and Employment Outcomes tabs.

Guidance on entering Training and Employment outcomes can be found at https://labor.ny.gov/workforcenypartners/osos/WIOA-Performance-Measures-and-Outcomes-Guide.pdf

RESOURCES AND ASSISTANCE

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

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

Dislocated Worker Checklist

https://labor.ny.gov/workforcenypartners/PDFs/dislocated-worker-osos-checklist.pdf

OSOS Guide: Creating a Basic Customer Record

https://labor.ny.gov/workforcenypartners/osos/Creating-a-Basic-Customer-Record-OSOS-Guide-12-10-2018.pdf

OSOS Guide: Creating Providers Services and Offerings

https://labor.ny.gov/workforcenypartners/osos/OSOS-Guide-Creating-Providers-Services-and-Offerings.pdf

OSOS Guide: WIOA Performance Measures and Outcomes

https://labor.ny.gov/workforcenypartners/osos/WIOA-Performance-Measures-and-Outcomes-Guide.pdf

TEGL 4- 18 :

https://wdr.doleta.gov/directives/attach/TEGL/TEGL_4-18.pdf

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: help.osos@labor.ny.gov