# REOS Master Guide

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What is REOS?

REOS is an acronym for Re-Employment Operating System. REOS is used by staff in the NYS Career Centers of the NYS Department of Labor to manage scheduling operations for customers receiving services. REOS is used to schedule appointments (in most cases, mandatory UI appointments) and to send corresponding appointment notices. REOS also contains a “log and control” screen that is updated once per week after staff in the TCC record log notations or control messages on the customer's UI record.
Setting up REOS

You will need to use Internet Explorer (IE) to open and use REOS. However, you may first need to make a few adjustments to the browser to allow all functions of REOS to run properly.

Currently, most DOL users have Internet Explorer version 11 installed on their PC. Some may be using an older version of Internet Explorer (in most cases, IE8). To identify which version you have installed and to learn how to configure the browser, please refer to the guide found on the DOL webpage at:


Opening REOS

The most up-to-date web address link for REOS will be posted on the DOL Intranet at the bottom of the home page, under “Personal Links.” You may bookmark the link, but be mindful that whenever a new version of REOS is released, you will need to use the updated link which will be posted on the DOL Intranet.

http://sdolintranet:81/cookies/cityenter.asp
Logging In

To log in to REOS, enter your user name and password. This is the same user name and password you use to access AOSOS. Most often, the user name is you RACF ID. Click “Login.”
**Note:** When a new OSOS account is created or when a REOS account is added for an existing user, an overnight update is required. For that reason, if your account was created or added today, you will have to wait until the following business day to access REOS.

**Main Menu**

After you successfully login, you will see the main menu. The five items on this menu contain all of the functions of REOS.
Search

The search section consists of nine tabs that can be used individually or in combination with one another to set specific customer search criteria.

Quick Search
Customer ID

To search by this field, type up to ten customer IDs in the space(s) provided by **ID 1 through ID 10**. Please note: You are unable to search for both ID number(s) and SSN number(s) in the same search.

Customer SSN

To search by this field, type up to ten social security numbers (without typing the dashes - the system will automatically enter the dashes) in the space(s) provided by **SSN 1 through SSN 10**. Please note: You are unable to search for both ID number(s) and SSN number(s) in the same search.

Customer Name

To search for a customer by name, type in their first name, middle initial, and last name. Last name is the only required field, so if you do not have the first name or middle initial, you may leave those fields blank. If you do not know the exact spelling of the name, un-check the box next to “Exact Match” and the system will return similar results.

REOS Record Status

To search for individuals with a specific REOS status, click on the **REOS Record Status** drop down box and select a status from the list provided.

Status Changed Date

To search for individuals who have changed statuses for a specific date or range of dates, click on the **Status Changed Date** drop down box and select an option from the list provided.

REOS Create Date

To search for customers by the date their record was downloaded into REOS, click on the **REOS Create Date** drop down box and select an option from the list provided and enter the date or range of dates to search.
**Geographic**

To search by county, click on the **County 1** drop down box and select a county from the list provided. You can search for up to five counties by repeating this process for the additional county drop down boxes.

**City**

To search by city, type the city name in the space provided next to **City 1**. You can search for up to five cities by repeating this process for the additional city boxes.

**Zip Code**

To search by zip code, type the zip code in the space provided next to **Zip Code 1**. You can search for up to five zip codes by repeating this process for the additional zip code boxes.
TCC Office

To search by TCC office, click on the **TCC Office** drop down box and select an office from the list provided.

Region

To search by region, click on the **Region** drop down box and select an option from the list provided.

Reporting Office

To search by reporting office, click on the **Reporting Office 1** drop down box and select an office from the list provided. You can search for up to three reporting offices by repeating this process for the additional reporting office drop down boxes.

LWIA

To search by LWIA, click on the **LWIA** drop down box and select an LWIA from the list provided.

Staff Name

To search by OSOS staff person assigned, click on the **Staff Name** drop down box and select a name from the list provided.
Customer Characteristics

Work Search Required Status

To search by work search required status, click on the Work Search Required Status drop down box and select Yes or No.

599 Status

To search by 599 status, click on the 599 Status drop down box and select Yes or No.

Shared Work Status

To search by shared work status, click on the Shared Work Status drop down box and select Yes or No.

SEAP Status

To search by SEAP status, click on the SEAP Status drop down box and select Yes or No.

Union Status

To search by union status, click on the Union Status drop down box and select Yes or No.
Temporary Layoff

To search by temporary layoff status, click on the Temporary Layoff drop down box and select Yes or No. Click on the drop down menu next to TLO RTW DT to enter a specific date or date range.

Education Level

To search by the customer's education level, select the Education Level drop down menu and choose the appropriate option.

Seasonal

To search by seasonal status, click on the Seasonal drop down box and select Yes or No. Click on the drop down menu next to Seasonal RTW DT to enter a specific date or date range.

REA Status

To search by the customer's REA status, select the REA Status drop down menu and choose the appropriate option.

Primary Language

To search by primary language, click on the Primary Language 1 drop down box and select a language from the list provided. You can search for up to three primary languages by repeating this process for the additional primary language drop down boxes.

Veteran Status

To search by veteran status, click on the Veteran Status drop down box and select Yes or No.

Veteran Disabled

To search by veteran disabled status, click on the Veteran Disabled Status drop down box and select an option from the list provided.

Profile Status

To search for individuals that have a profile score equal to a specific score or range of scores, click on the Profile Score drop down box and select an option from the list provided. Type the score in the first space provided. If you selected Between from the Profile Score drop down box, you will need to type a score in the second space provided. This gives you the option of selecting a range of scores.
OSOS Record Status

To search by OSOS record status, click on the OSOS Record Status drop down box and select a status from the list provided.

OSOS Job Seeker Status

To search by OSOS job seeker status, click on the OSOS Job Seeker Status drop down box and select a status from the list provided.

Rapid Response

To search by rapid response status, click on the Rapid Response drop down box and select Yes or No.

NY.Gov Account

To search by customers who do or do not have an NY.Gov Account, click on the NY.Gov Account drop down box and select Yes or No.
OSOS Desired O*NET Title

To search by the OSOS desired O*NET title, select the **OSOS Desired O*NET Title** option, click on the first **Category** drop down box and select a category from the list provided. Click on the **Title Desired** drop down box and select a title from the list provided. You can choose to search for up to three of the category and title combinations. You can choose to search for titles that are statewide or regional demand occupations by clicking on the **Demand Occupation** drop down box and selecting an option from the list provided. Please note: When searching by demand occupations, statewide is the default option. If you would like to search for regional demand occupations you need to select the Regional option before you begin your search.

OSOS Coded UI Job Title

To search by the O*NET coded UI job title, select the **O*NET Coded UI Job Title** option, click on the first **Category** drop down box and select a category from the list provided. Click on the **Title Desired** drop down box and select a title from the list provided. You can choose to search for up to three of the category and title combinations. You can choose to search for titles that are statewide or regional demand occupations by clicking on the **Demand Occupation** drop down box and selecting an option from the list provided. Please note: When searching by demand occupations statewide is the default option. If you would like to search for regional demand occupations, you need to select the Regional option before you begin your search.
UI Job Title

To search by the UI job title, type the title in the space provided next to **UI Job Title**. Please note: If you are not sure of the exact title name, you can search similar spellings by clicking on the box to the left of Exact match. This will remove the check mark from the box.

Work Experience

To search for individuals that have a specific number of months experience or range of experience, click on the Work Experience drop down box and select an option from the list provided. Type the number of months experience in the first space provided. If you selected Between from the Work Experience drop down box, you will need to type a number in the second space provided. This gives you the option of selecting a range of experience.

UI Eligibility

![UI Eligibility](image)

**Effective Days Used**

To search for individuals that have used a specific number of effective days or range of effective days, click on the **Effective Days Used** drop down box and select an option from the list provided. Type the number of effective days in the first space provided. If you selected Between from the Effective Days Used drop down box, you will need to type a number in the second space provided. This gives you the option of selecting a range of effective days used.

**UI Rate**

To search for individuals that have a specific UI benefit rate or range of UI benefit rates, click on the **UI Rate** drop down box and select an option from the list provided. Type the UI benefit rate in the first space provided. If you selected Between from the UI Rate drop
down box, you will need to type another UI benefit rate in the second space provided. This gives you the option of selecting a range of UI benefit rates.

**Benefit Year Ending Date**

To search for individuals that have a benefit year ending date equal to a specific date or range of dates, click on the **Benefit Year Ending Date** drop down box and select an option from the list provided.

**Last Certification Date**

To search for individuals that have a last certification date equal to a specific date or range of dates, click on the **Last Certification Date** drop down box and select an option from the list provided.

**Effective Claim Date**

To search for individuals that have an effective claim date equal to a specific date or range of dates, click on the **Effective Claim Date** drop down box and select an option from the list provided.

**Additional Claim Date**

To search for individuals that have an effective claim date equal to a specific date or range of dates, click on the **Additional Claim Date** drop down box and select an option from the list provided.

**Reopened Claim Date**

To search for individuals that have an effective claim date equal to a specific date or range of dates, click on the **Reopened Claim Date** drop down box and select an option from the list provided.

**Migration Date**

To search for individuals that have an effective claim date equal to a specific date or range of dates, click on the **Migration Date** drop down box and select an option from the list provided.

**UCX Indicator**

To search for individuals with or without a UCX status, click on the **UCX Indicator** drop down menu and select Yes or No.
Scheduled Appointment

Appointment Purpose

To search by appointment purpose, click on the **Appointment Purpose** drop down box and select an appointment purpose from the list provided.

Appointment Date

To search for individuals that have an appointment date equal to a specific date or range of dates, click on the **Appointment Date** drop down box and select an option from the list provided.
Appointment Time

To search by appointment time, type the time of the appointment you are searching for in HH:MM format in the space provided next to Appointment Time, click the drop down box to the right and select AM or PM.

Appointment Location

To search by appointment location, click on the Appointment Location drop down box and select an appointment location from the list provided. Please note: This feature cannot be used in combination with the Geographic tab. Therefore, when using this feature you will only be able to search for individuals with a reporting office equal to the office you are currently signed into.

Scheduled By

To search by the staff person who scheduled the appointment, click on the Scheduled By drop down box and select a staff person from the list provided.

Scheduled On

To search for individuals that had an appointment scheduled date equal to a specific date or range of dates, click on the Scheduled On drop down box and select an option from the list provided.

Attended

To search by appointment attendance results, click on the Attended drop down box and select Yes (attended), No (did not attend) or Neither (no appointment result was recorded).

Reason Not Attended

To search by reason not attended, click on the Reason Not Attended drop down box and select a reason from the list provided.

Letter Type

To search by letter type, click on the Letter Type drop down box and select a letter type from the list provided. Please note: This feature cannot be used in combination with the Geographic tab. Therefore, when using this feature you will only be able to search for individuals with a reporting office equal to the office you are currently signed into.

Letter Date

To search for individuals that have a letter date (date the appointment was scheduled) equal to a specific date or range of dates, click on the Letter Date drop down box and select an option from the list provided.
Tools

To search by which pool a customer might be in, click the radio button next to either RSO Pool or Reschedule Pool. Next, select a status from the Status drop down menu and set a pool date from the Pool Date drop down menu.

Activities

Last Served Date

To search for individuals that have a last served date (date of the individual’s last service) equal to a specific date or range of dates, click on the Last Served Date drop down box and select an option from the list provided. Please note: When searching by last served date you are limited to searching for individuals that are assigned to the office you are currently signed into and search date(s) within 90 days.

Category

To search by an activity category, click on the Category 1 drop down box and select an activity category from the list provided. Once you have selected your category, narrow down your search by adding information the Activity Type, Created On, Created By, Due Date, and/or Staff Assigned fields. You can do this for up to two different categories.
Employment History

Employer

To search by employer name, type the employer name in the space provided next to **Employer**. Please note: If you are not sure of the exact name and spelling of the employer, you can search similar spellings by un-checking the box next to “Exact Match”.

Employer FEIN

To search by the employer’s FEIN number, type the FEIN in the space provided next to **Employer FEIN**.

Employer NAICS

To search by the employer’s NAICS number, type the NAICS in the space provided next to **Employer NAICS**.

Work Location

To search by the individual’s work location, type the work location in the space provided next to **Work Location**.
Salary

To search for individuals that have a specific salary or range of salaries, click on the Salary drop down box and select an option from the list provided. Type the salary in the first space provided. If you selected Between from the Salary drop down box, you will need to type another salary amount in the second space provided. This gives you the option of selecting a range of salaries. Click on the Unit drop down box and select an option from the list provided.

Advanced Options

This screen gives you the option of displaying additional fields to your search results. To add an available field(s), make a selection from the Available Fields list under Display Results and click on the Add >> button. You can also remove a selection from the list of displayed fields by selecting the field you would like to remove from the Displayed Fields list provided and click on the Remove << button. You will need to repeat this process for each selection you would like displayed or removed.

You can choose up to two of your criteria to sort your search results by (this is optional). Select them from the drop down menus under Sort Result.

When all of your search criteria are set, click on Search at the bottom.
Search Results

Search results will display as a list of customers with (at a minimum) Customer ID, Last Name, and First Name. Additional display result categories can be added by going to the Advanced Options screen before the search is conducted. From this screen, you can View Follow Ups, Create Follow Up, view Customer Detail, conduct a new or revised Search, Add a Comment, conduct a Group Update or return to the Main Menu.

If your search returns no results based on the criteria entered, you will see this screen.
**Group Update**

The Group Update feature allows you to update any of the following features for multiple customers at once:

- Primary Language
- Reporting Office
- Union Status and Union ID
- TLO Status and RTW Date
- Seasonal Status and Seasonal RTW Date

The Group Update feature is accessed from the Search Results screen.
To update any of the fields for the selected group, either choose from the drop down menu or type a value into the text box and click "Save."
Follow Ups

The Follow Up section of the Main Menu only allows you to view, edit, remove and/or print follow up appointments.

To create a follow up, you must click the “Follow Up” button on the Customer Detail screen or at the bottom of the search results screen.

When you click on the “Follow Ups” button on either one of these screens, you can choose to View Follow Ups or Create Follow Up from the drop down menu.
View Follow Ups

Once you are on this screen, you can filter the list of Follow Ups by any combination of Due Date, Assigned To, SSN, and/or Purpose. Once you have entered your filter criteria, click on the Filter button and only the follow ups that meet the filter criteria will be displayed.

From this screen you have options to view Customer Detail, Edit Follow Ups, Remove Follow Ups, and/or Print Follow Ups. Click the box to the left of the customer you wish to perform any of these options for. You can also select or deselect all follow ups by clicking the "Check All" or "Uncheck All" button at the bottom.
Create Follow Up

To create a follow up, choose the follow up date, choose your name from the drop down menu next to “Assigned To” (optional), choose a type of follow up from the “Purpose” drop down menu, enter a comment about the follow up (optional), and click Save.
Schedule

The "Schedule" selection will bring you to the Scheduling Menu. Here you can go to view/edit existing appointments, add new appointment slots, enter appointment results, schedule the weekly office download, and maintain your office's contact and address information.

View/Print Appts

To view and/or print already-scheduled appointments, select the radio button next to either "By Appointment" or "By Date(s)". The "By Appointment" drop down menu will list all scheduled appointments. The "By Date(s)" option allows you to find appointments scheduled for a specific date or time period. Once a list of appointments appears, you will have an option to "Print List" at the bottom of the screen.
By Appointment

Select an appointment

A list of customers will appear here

By Date(s)

Enter a date or date range

Click "View"

A list of customers will appear here
Add/Edit Appointments

This section displays the list of appointments scheduled for the office you are currently signed in to. From this screen you have the option to add, delete, or edit an appointment.

Add appointment

To add an appointment, choose an appointment purpose, set a date and time, and add the maximum number of appointment slots for that specific appointment. Click “Add” and the appointment will appear in the list above.
Delete an appointment

To delete an appointment, check the box next to the appointment you wish to delete and click "Delete Appt."

Edit an existing appointment

To edit an existing appointment, check the box next to the appointment to edit, change the necessary information, and click "Update Appt."
Record Appt Results

You can record appointment results on an individual customer record, or you can look up and result appointments scheduled for the entire office.

Appointment results for individual

Search for the customer in REOS. Under the Appointments/Correspondence tab, select “Yes” or “No” from the menu under “Attend”. If the customer did not attend, select the reason the customer did not attend from the menu under “Reason Not Attended.”

Note: When a customer (or multiple customers) are certifying for UI benefits and are resulted as “No” for attending and “FTR” for Reason Not Attended, you will receive a confirmation that you want to place this/these customers on hold. Confirm that you wish to place the hold by clicking “Yes.”
Appointment results by office

To result customer appointments by office, select the radio button next to "By Appointment". Select the appointment type from the menu. Select "Yes" or "No" in the "Attend" field for each customer. The "No" result requires a reason the customer did not attend. Choose an option in the menu, under "Reason (IF N)". Click "Proceed" after all results have been recorded. Clicking "Proceed" will trigger the FTR Hold confirmation page, where you will have to confirm that you wish to place an FTR hold on the customer's UI benefits.

To result customer appointments by date(s), select the radio button next to "By Date(s)" and click "View." Follow the same procedures as above to result customer appointments.
**Pools**

The Pools section will allow you to navigate to either the **RSO Pool** or the **Reschedule Pool**. These pools are simply lists of customers that need to be scheduled for a specific type of appointment at the Career Center. From this screen, you can also navigate to the **Schedule Menu** or the **Main Menu**.
RSO Pool

The RSO Pool will be populated each Friday with customers from the weekly UI download.

Reschedule Pool

When customers do not attend a scheduled appointment and are resulted as "No," REOS will ask if you would like to add them to the Reschedule Pool.

Selecting the radio button and clicking "Proceed" will add them to the Reschedule Pool. To access the Reschedule Pool, you will need to navigate to the Pools section of the Schedule Menu.

Once in the Reschedule Pool, select the radio button next to the category to schedule/view. Select either Detail View, Delete From Pool, or Schedule.
Detail View

Detail View will take you to this screen. Here you can add or remove categories to the list view of customers. Customer ID, Last Name, and First Name are default categories that cannot be removed.

Delete From Pool

When you click Delete From Pool, you will receive a confirmation window. Click "OK" to delete all customers in the chosen category from the Reschedule Pool. Click cancel if you do not wish to delete these customers.
To schedule appointments with an appointment letter, select the radio button next to "Schedule Appointments with Appointment Letter" from the **Select One Group Function** section. Choose an appointment purpose and letter type. Set a date, time, and max number of appointment slots. Click "Add."

After you click "Add," the appointment will appear under "Appointments Available for Select Purpose". You can add multiple appointments in this manner. Check the box next to the appointment you wish to schedule and click "Proceed."
Review the customers scheduled and ensure that all of the appointment information is correct. Click "Complete Scheduling."

Choose "Confirm and Finalize." You will be prompted to save the file. Please refer to the Letter Generator Instructions to import and print the appointment notices.
Edit Office

The Edit Office section allows you to

1. Change the office address
2. Add, edit, or delete office locations (i.e. conference room numbers)
3. Add, edit, or delete letter types

Change the office address

To change the office address, add the new address information into the corresponding fields and click "Update."

Add, edit, or delete office locations

1. To add an appointment location, select the radio button and enter the location name in the corresponding text field at the bottom left. Click "Add."
2. To edit an appointment location, select the radio button next to the appointment location you wish to edit. The text box will allow data entry after the button is selected. Make the appropriate changes and then click "Edit."
3. To delete an appointment location, select the radio button next to the appointment location you wish to delete. Click "Delete."

Add, edit, or delete letter types

1. To add letter types, click on the radio button next to the blank text box under “Letter Type.” Type in the name of the letter **exactly** how it appears in the REOS Letter Generator/Letters folder. Briefly describe the letter in the “Letter Description” field. The name you choose here will appear in the drop down menu when scheduling. Click "Add."
Note: For letters written in Spanish, please see this additional step.

REOS has a letter-naming convention that is required in order to trigger Spanish day-of-week and month fields:

In order for REOS to provide the Spanish wording for the day-of-week and month fields, the “letter type” name must contain the string “_S_”. For example "1stRESEA_S_".

The name of the letter in the REOS Letter Generator/Letters folder should already include the "_S_". If it does not, you can rename the letter template file in the folder by right-clicking on the letter and choosing "Rename" from the menu.
From here, you can follow the normal procedures to **add, edit, or delete letter types to REOS**.

2. To edit a letter type, click on the radio button next to the letter that you wish to edit. Once selected, the text boxes will become editable. Make the appropriate changes and click "Edit."
3. To delete a letter type, click on the radio button next to the letter that you wish to deleted and click "Delete."
Change Office

This selection allows you to login to a specific office that you have access to. Select the radio button next to the office you wish to sign in to, and click “Change Office” at the bottom.

Logout

When you click “Logout”, you will see this message appear. Click “OK” to log out of REOS or “Cancel” to remain logged in to REOS. REOS will automatically log you out if it has been idle for a period of time. However, it is good practice to logout manually when you are done using the system.
Customer Detail

Customer Detail is displayed when you search for only one customer, or when you choose the "Detail" option from the Search Results screen. It is a detailed account of the customer's REOS record and contains the following seven tabs:

General Info

The General Info Tab is divided into two primary sections: Customer Data and UI Eligibility Info. It displays the customer's contact information such as their SSN, address, telephone number, and email address. It also displays some basic information about their UI claim. Any box that is white (opposed to gray) indicates a changeable field. These include "Primary Language," "Sign Lang Required," "Reporting Office," "Union," "TLO" and "Seasonal" fields. There is also a link that can be clicked in the to view the customer's address history.

Note: Whenever a change is made to the record, you must click "Save" at the bottom of the page to commit the changes.
Customer Activity

The Customer Activity tab displays comments entered on the customers REOS and OSOS records. It also displays OSOS activities that have been entered on the customers OSOS record.

**Note:** Changes to a customer's OSOS record take an overnight update to appear in REOS.

You can use the drop down menu to chose a category to filter the customer activity.

Appointments/Correspondence

The Appointments/Correspondence screen displays any scheduled appointments or correspondence for the individual customer. From this screen you can record appointment results, add a comment, and add or delete an appointment or correspondence.
Note: To add a comment to the customer's REOS record, click the “Add Comment” button on the Appointments/Correspondence tab. Type in the comment and click “Save.”
Work History

The Work History tab displays information about the customer's previous employer or employers and their employment details. As with the General Info, any of the white text boxes can be updated.

**Note:** Whenever a change is made to the record, you must click "Save" at the bottom of the page to commit the changes.
UI Issues

The UI Issues tab displays any UI Issues that were reported to the UI division through REOS. It also displays the dates of held payments associated with any UI Issues. Staff can report a UI Issue from this screen.

**Note:** If there is a UI hold placed (such as an FTR hold) in error, it can be removed from this screen, but only on the same day the hold was placed.
Log and Control

The Log and Control tab displays information from the customer's UI record including any holds on payment and log notations made by representatives at the TCC. The hold information on the left indicates what kind of hold and when it was placed. The information on the right indicates the time frame in which UI benefits will be placed on hold.
**Status History**

The Status History screen displays about the customer's current and previous REOS status (if one exists) and when the status changed.
REOS Letter Generator

The REOS Letter Generator and all associated files and folders, are stored on a shared DOL server called DEWS-BEWO-Field. To see if your PC is mapped to the correct server, click on the My Computer Icon, and see if it is listed under “Network Location.” If you do not see the server listed, follow the instructions in this guide.

Once you are mapped to the correct drive, open the folder for your office and then the sub folder that will have the name of your office followed by _REOS Letter Generation. The REOS Letter Generation folder will look similar to this:

Right click on the “Letter Generation” shortcut and select “Copy.” Paste the shortcut to your desktop for quick access to the Letter Generator.

REOS Help Desk

If you need help setting up the REOS Letter Generator or with any other REOS related issues, please email the REOS help desk at help.reos@labor.ny.gov.