To view the full recording, visit https://dews.webex.com. On the right-hand side of the page at the top, click on “View session recordings.” Select: “OSOS Tips and Tricks for Youth Program Entry” then Select “View” for the recording to begin. When prompted, enter “Careers” for the password.

Good morning. Thank you for joining us for the May 2018 Youth Issues Webinar. I am Alyssa with the Youth Team.

We have some exciting topics for you today. Poul from the OSOS Team is here to share tips to help you get the most out of OSOS and Tim from Employment Services is here to give us some great ideas on using JobZone.

A quick note of housekeeping: Don’t worry about taking extensive notes. We will send this presentation out with follow-up resources after the webinar.
Before we get started, I wanted to let you know about a wonderful increase in the New York Youth Jobs Program. The tax credit that a business could receive after hiring and retaining a youth with certain barriers has increased up to $7,500. This is great news for our youth and for you when doing job placement!

If you don’t know about this program, all you must do is get your WIOA youth certified for the New York Youth Jobs Program by completing a simple form and ask the business that is considering hiring the youth to apply for the tax credit. We will send additional information about the program along with the follow-up resources after the webinar.

I really encourage you to learn more about the program if you haven’t already. This is a good way to make youth more desirable to businesses when searching for employment!

Let New York Youth Jobs Program help a business say “Yes” to a youth instead of “No”.

Now, I am going to turn it over to Poul from the OSOS team to talk about OSOS tips.
Thank you, Alyssa.

As many of you know, OSOS is a complex case management system that can, at times, be a bit intimidating. During this webinar, we will provide you with some tips and tricks that will hopefully make data entry easier.

Today we will review:
• how to set your search display options
• helpful functions within the Staff Module for case management
• required data fields for youth eligibility and funding
• youth service exceptions
• how to reset CareerZone passwords and unlock accounts; and
• the features of JobZone
Search Display Options

Now let’s review how to set the customer search display options.
The Options button is located at the bottom of the screen in the Customer module, Customer Search window, Quick Search tab.

The default settings on the title bar may not be relevant to every staff member's job duties. Staff should customize their search display options to provide the most useful information. The gray title bar in the Customer Search window shows what information about the customer(s) will be displayed in the initial search results.

This screen shot shows the system defaults.
To access the display options, click on the Options button at the bottom left of the screen.
The Customer Search Result Columns pop-up window displays all of the fields that can be added to the title bar. These fields can be selected or de-selected by clicking on the checkbox next to them. The number to the right of the field name indicates the order in which the fields will be displayed on the title bar. Staff can change this order by manually re-numbering the selected fields or by clicking and dragging the sections in the gray preview title bar at the bottom of the pop-up.

Helpful fields that staff should consider including in their search results are: OSOS ID, Seeker Name, SSN, Date of Birth, City, Status, Phone, Email. Seeker Name and Date of Birth are important fields to include, as staff can use this information to easily identify potential duplicate OSOS records. However, staff should consider their assigned job duties and select fields which will best assist them in efficiently identifying customers in the context of their work assignments.

Once staff have selected the fields and the display order that will be the most useful to them, they should save the settings. Check the “Set As My Defaults” checkbox and then click Save. This will ensure that these settings will remain as the default settings used each time that staff member runs a customer search in OSOS. These settings can be changed at any time, either to alter the defaults or to run a single search.
As you can see, the search data is now presented in the order of the saved default.
Staff Module Functions

• Next Contact Date

• My Caseload

• Lists

There are functions within the Staff module that may be helpful in managing your customer case load.

Next Contact Date, My Case Load and Lists.

Let’s start with Next Contact Date…
When entering or editing services, the Next Contact Date is a useful field for customer scheduling. While the field is not required for program purposes, entering a date in the **Next Contact Date** field will generate a reminder that will be sent to the Inbox in the Staff Module of OSOS for any service details that require additional attention.
The Staff module, Staff Detail window, **Inbox** tab is the first screen you see upon logging into OSOS. The **Inbox** page provides a list of appointments and event reminders for the currently signed-in staff person. Again, the system generates automatic reminders based on the date from the Next Contact Date field in Services detail.

From here, you can directly access the customer record.
Highlight the desired appointment and click Detail.
You are now in the Customer Detail window for the selected customer.
To delete the reminder from the list, highlight the desired reminder for removal and click Delete Message.
You will receive another prompt to verify that you would like to delete the message from your inbox. Click OK.
The selected reminder has been deleted from the inbox list. Click Save.

Now we will review the My Case Load functionality.
My Case Load is a tool that is used to assign a customer to your specific caseload. This is done from the customer record in the Customer module, Customer Detail window in the General Info tab as shown. It is not available in the Services window.

To add a customer to your case load, click the **Add to Case Load** button located in the middle of the screen.

There is no need to save the record for the purpose of adding the Customer to your Case Load.
To view your total case load, navigate to the Staff module > Staff Detail window > My Case Load tab.

The My Case Load page provides the roster of customers assigned to the staff member’s Case Load.
To remove a Customer from My Case Load, highlight the customer and click Remove from Case Load.

A prompt will appear to verify that you do want to delete the selected record. Click Ok.
The customer is now removed from My Case Load.
A youth customer can also be removed from the Case Load directly from the Customer Record.

In the Gen. Info tab click Remove from Case Load in the center of the screen. The youth customer is now removed from My Case Load.

Now, let’s talk about Lists!
OSOS provides the option to assign a customer a self-prescribed list.

To add a customer to a list, go to the Add'l Info tab of the customer record.

In the Customer List Participation section, click Assign to List.
The List Management Webpage Dialog will appear. Click Lookup List.
Your active lists will display. Highlight the desired list and click Select.
The customer is now assigned to the List Name: Youth.

Note that a customer can be assigned to multiple lists.
To view your Lists, navigate to the Staff module > Staff Detail window > Lists tab.

Your Lists will be displayed.

To view the customers assigned to a list, highlight that List and click Search.
The list of customers assigned to that list are then displayed.

To enter a customer record, highlight the specific customer and click Detail.
You are now brought to the Customer Detail window for the selected customer.
One way to remove a Customer from a List, is to go to the Add'l Info tab of the customer record.

Check the desired List Name and click Remove and Save.
The customer is now removed from the list.

As you can see, The Case Load and Lists functions can provide different ways to organize your customer records.

There are OSOS Guides available for more in-depth instruction and the links will be available in the material being sent out after the webinar.
Now we will review the data entry fields in the customer record that are required to enter a youth service and attach appropriate funding.
OSOS requires certain data entry fields to be complete within the customer record to be able to enter a youth service and attach appropriate funding.

On the General Info tab, the DOB and Gender are required.
On the Eligibility tab, the Income Information and Disability Information are the categories that affect youth eligibility.

For Income Info you must choose one option from the dropdown menu for each required field. If the youth meets the low-income requirements, either Lower Living Standard or Income 70% LLSIL must be yes however both cannot be yes. High Poverty Area is also required.

**Here is a helpful Tip:**
Complete the Disability Info field first.

If the youth customer has a disability, then the Youth’s *individual income* is used in the Income Info section as opposed to family or household income. For ISY with a disability, ensure that they meet one of the low-income criteria. "Family of one" does not always make an individual low-income.

While we are not going to review the Income Eligibility Guidelines for the purposes of this webinar, we encourage you to review low-income as it pertains to In-School Youth and Out-of-School Youth. The Income Eligibility Guidelines link will be included in the material being sent out after the webinar and can be reviewed on the Programs and Tools page of the NYSDOL website at: [https://labor.ny.gov/workforcenypartners/tools.shtm](https://labor.ny.gov/workforcenypartners/tools.shtm).

The Migrant Info is required for the customer record and needs to be completed, but is not a youth eligibility field.
On the Add'l Info tab, Service Veteran status and the Selective Service information are required.

If the customer is a male born after Dec 30th 1959, which would be true for all male youth participants, selective service must be entered for those 18 and over.

If the customer does not know their Selective Service registration number, the Register/Lookup button can be used to find the number. The number will not auto populate and must be manually entered.
The **Comp Assess** (Comprehensive Assessment) window of the **Customer Module** is where much of the Youth eligibility information is recorded. Not all tabs within the **Comp Assess** window will be used to determine youth eligibility but always complete as many fields as possible when entering the customer into OSOS. This way, the profile is as robust as possible and no program eligibility options are missed.

Youth Eligibility Fields in Comp Assess window include:

- Youth Needing Additional Assistance
- Is Customer parenting youth? If female, Is customer pregnant?
- Offender Status
- And
- Current Housing

Remember that youth eligibility is determined at the time of enrollment so be sure to enter ALL barriers that the youth has at the time of enrollment.
Now let’s review Exceptions for Youth Service data entry. Almost all youth services will have similar data entry elements, however, there are two occasions when data entry of youth services will be documented differently. The first being occupational skills training (OST).
For Occupational Skills Training, the word youth is not in parenthesis. The reason for this is because all occupational skills trainings must be from the Eligible Training Providers List (ETPL). The ETPL does not and cannot distinguish between youth and adult. Therefore, all occupational skills trainings must be entered in the same way into OSOS.

For OST Services, selected the Program Service Type of youth services. Because OST is not designated specifically as a youth service, the Youth ITA waiver must be selected in the Program field.

It is also important to mention that an Achievement Objective must be selected when entering all youth services.
Once the service details have been entered, youth funding can now be attached to the service. Enter $1.00 in Total Funding and click Add.
From the Funding tab, enter $1.00 in Obligated Amount and select the WIOA Youth Local funding for the appropriate program year. Click OK.
This is what the screen will look like after we have entered a youth service and funded the service with WIOA Youth Funds. Then, at the bottom of the screen, click Save.
Youth Services
Exceptions: Follow-Up

The second exception when entering youth services is Follow-Up.
Staff are required to provide follow-up services to youth for a minimum of one year after the last service is provided. Under WIOA, there are five allowable service elements that can be provided to youth as Follow-up Services. OSOS includes the five allowable elements under Follow-up as Service Types. In addition, WIOA allows for a provision of Follow-up that is not included under one of the 5 allowable elements. The Service Type entitled, “Follow-up Non-Element,” is for staff to record a concrete Follow-up Service that was provided outside of the five allowable elements.

For example, contacting the youth’s School Counselor would be a valid “Follow-up Non-Element (Youth)

An example of when it is NOT appropriate to use the Follow-Up Non-Element (Youth) would be contacting the youth to update information in OSOS such as address, phone number or email.

Please remember that even though contact may not result in a follow-up element, any contact or attempted contact must always be documented in the Comments section of the customer's OSOS record.

Now, to attach a Follow-up service, select the “Follow-up Services Element” folder, in the L2 WIOA youth services folder, then select the Follow-up Service Type that most accurately reflects the Follow-up service that was provided to the youth. Click OK.
Upon selecting the correct Service Type, and entering the other necessary data, you will select **Follow Up** from the **Program Service Type** drop-down.

This is selected because providing Follow-up services does not create or extend an enrollment.

**Do not select Youth Services as the Program Service Type to record a Follow-up service.**

**This is the only time you will not select Youth Services as the Program Service Type.**

Also, the Youth Unit previously presented a webinar on Follow Up Services. That webinar will be included in the material sent out after this presentation. If you have any other questions regarding Follow-up services, you can reach out to the Youth Unit.
Let's now talk about the Portfolio Level data field of the customer record.
The Youth Unit has received a number of questions from youth providers regarding youth whose OSOS account is connected to JobZone. Many youth providers have inquired about changing job zone back to career zone. Unfortunately, this cannot be done. OSOS auto generates the customer’s portfolio level based on certain criteria on the customer record. The Portfolio Level designates whether the customer has a JobZone or Career Zone account. This cannot and should not be changed.

Job Zone is connected to ny.gov and removing job zone from a customer’s OSOS account will cause issues with the customer’s ny.gov account and may affect their ability to use Unemployment Insurance online services. This is why it is very important that this field should not be manipulated. Juie and her team did a recent webinar on the similar features of JZ and CZ and later in this presentation, Tim will talk about JZ in further detail.

Once again, please do not manipulate the information in the Portfolio Level field.
For those customers who do have a CareerZone account, providers have the ability to assist them with updating their CZ passwords and unlocking their accounts. This is only for CareerZone. Please note that JobZone passwords need to be reset through the ny.gov application.

We are now going to walk you through how to update passwords and unlock CZ accounts.
Staff can update a customer's CareerZone password in two places. This information can be updated in the Customer module, Customer Detail window, General Info tab by changing the username and password fields, and click Save as highlighted on the screen.

This will update the customer’s CZ sign-in information. This update is applicable only to CareerZone. This does not work for JobZone accounts.

The other method that can be used to update a customer’s username and password information in CareerZone is to go into their account through manager mode.

To do this, click on the Career Zone window in the top right corner of the screen.
Click OK on the Welcome prompt.
You have now entered the customer’s CZ account in Manager Mode on the customer’s behalf, as indicated by the Orange Manager Mode. From here, click Update My Account to access the customer’s account information.
Select the Account Info tab on the left side of the screen.

The password update fields will be in the center of the accounts screen. If you would like, the OSOS Help Desk can also perform this task.

After the New Password and Verify Password fields have been updated, click Save.

Then click Logout to exit the customer’s Career Zone account.
The customer may also reset their password.

From the CareerZone sign on screen, click Forgot your Password
Forgot Password

Enter your user name and click Submit.

User Name: [Blank]  Submit

Enter the User Name and click Submit.
The customer is now required to answer the challenge questions that were completed when the account was created.
If the customer correctly answers the questions, the password will be updated and an email sent directly to the customer.
A customer has three attempts while trying reset their password.

An error message with a warning banner will appear if the information entered is not correct.
After the third unsuccessful attempt, the account will lock and the error message will display notifying the customer to contact an administrator for assistance.
Also, if the customer attempts to log in while the account is locked, they will receive an error message on the log in page.

The good news is that staff can unlock the account through Manager Mode.

In fact, manager mode is the only way to unlock the account. We will now review the steps for unlocking a customer’s Career Zone account.
Go to the customer record and click CareerZone.
Verify you have entered the account in Manager Mode and click Update My Account.
Form the Account Info tab, click Unlock Account located on the right-hand side of the screen.

The only time the unlock account option is available is when the account is locked.
The account is now unlocked.

And you will notice, the Unlock Account option is no longer displayed.
The password can now be reset by entering new data in the New Password and Verify Password fields. Click Save.

It is also important to note here that the reason the customer was locked out of their CareerZone account was because they entered incorrect information for the Challenge Questions. When unlocking a customer’s account, this would be a good opportunity to work with the youth to select challenge questions that he/she know the answers to.
The account update will be verified by the message shown.

Then click Logout to exit the account.
OSOS now displays the updated password. The customer will also receive an email with the updated information.

We hope all of you found this information to be useful. There will be time for questions at the end of the presentation.

But now, I would like to introduce Tim to talk with us about JobZone.
JobZone manager mode is a great way to introduce your youth customers to the JobZone Website and the many resources available on JobZone.

All of the features of JobZone manager mode I will cover are also available to your youth customers when they are logged into their JobZone account. The tools can be used Independently by your youth customers or with guidance from you.

Using manager mode with your customer at your desk makes a great introduction or could be a way to offer reasonable accommodations to those that may need it, such as reading the questions of an assessment to your youth customer. Lastly, Manager Mode offers us a portal to view the work a customer is doing on their own JobZone account, such as assessments, job searching or building resumes. Let's get started!
To access a youth’s JobZone account through Manager Mode select the JobZone button from the customer’s OSOS record.
Select OK at the Welcome screen.
You can verify you are accessing the youth customer’s account, in Manager Mode by the identifying orange banner that shows the customer’s name and the system mode.
First, I'll highlight the job search features in JobZone.
If your youth customer is looking for work, you can use the Keyword Search feature to search for jobs. Type in a job title or key word and click search.
Your search results will be listed in the search results field. Results are filtered by date; the most recent posts show at the top of the list.

If you see a job posting that is appropriate for the youth, click on the job title to display the job details and instructions on how to apply for the position.
You can upload a youth customer’s resume, or create a resume for your youth using the resume features in JobZone.
To upload a customer’s resume, scroll down to the Resume and Letter Preparation box in the center of the screen. Then click on ‘Upload a Resume Now’.
A dialog box will appear, Select Upload Resume. Browse and select the resume you wish to upload from your computer and click attach. Once attached you can close the dialog box.
Once a resume is uploaded it is stored in the Resume Builder—the resume will be available for the youth to access, download, and revise the resume from their JobZone account.

The resume will also be listed in the dropdown box within the Job Search tool box. You’ll be able to select the resume from the drop down in this section and search for jobs based on the information in the resume.
Once you complete a resume based job search, you will be directed to the search results screen. Explore these results with the youth.

From the search results page you can also set up a Job Scout. A Job Scout allows the youth to receive job leads directly to their email.

Scroll down the page to the saved search options. Name and save your search, then use the job scout Options button and complete the Job Scout options and click save.

Be sure to remind the youth customer to check their email on a regular basis to view the most up to date job leads being sent to their email.
If your youth customer doesn’t have a resume to upload it’s easy to create one in JobZone. From the home screen scroll down to the Resume and Letter Preparation box and click on Resume.
From the resume builder page choose the resume type you want to create, Full or Quick, and select the Create New Resume button.
Tutorial videos can be found at the Department of Labor’s Website. Choose ‘Find a job’ then choose ‘Career Exploration for Adults’
By scrolling down to the Resume and Letter Preparation section you will find tutorial videos for both the Quick and Full resume building tools in JobZone.
Assessments are a great tool to assist youth in identifying what their skills and interests are.
As a case manager you can review assessments that the youth has completed in their JobZone account by clicking on, ‘Report’ in the self-exploration tool box.

The report feature will combine the information from the assessments and display potential jobs or careers you and your youth customer should explore.
On the report page you can see the results of the different assessments the youth has completed. The star matching shows the strength of the customers match to careers and jobs based on their responses to assessment questions.
What to Avoid in Manager Mode

While you are in JobZone manager mode you will not need to access or change the customer’s account setting.
Changing this password does **not** change the youth’s login information.

As Poul stated earlier, JobZone is connected to NY.gov, and the username and password shown here are not connected to the youths NY.gov login information.

This screen is a little misleading, it appears that you could change a password from this screen by entering or changing information here but in fact changing this information **does not** affect the youth customers username and password used to log into JobZone.

You should not change any information on this screen.

If you need to change contact information or other job search data you should do so in OSOS.
JobZone Manager Mode

To recap:

- Use JobZone manager mode to introduce your youth customers to the JobZone website.

- All of the features I went over are also available to your youth customers when they’re logged into their JobZone account.

- Manager Mode could be a way to offer reasonable accommodations to those that may need it.

- Manager Mode offers us a portal to view the work a customer may be doing such as assessments, job searching or building resumes.

- DO NOT use manager mode to attempt to change Username or Password login information.
Accessing JobZone

To access the JobZone website the youth will need to log into their NY.gov account.
The **only** way the youth can access their JobZone account is through the NY.gov portal. If the youth knows their login information they would enter their username and password here.

If the youth cannot remember either piece of their login information (username or password), BUT knows the email address they used to create the account AND has access to the email account they can reset the username or password by clicking on the Username or Password link (highlighted by the red box).

If the customer forgot both the username and password these two fields will need to be reset independently from each other.
The youth customer will need to enter their name, email address and Captcha to reset the information, clicking continue will automatically send the youth an email with either the username or temporary password (depending on what was requested).
There is a new process that can be followed when working with a youth customer who is locked out of their NY.gov Account. In the past, the youth was instructed to call the Department of Labor Contact Center for account resets. However, Contact Center wait times can be extensive causing frustration for the youth and the provider.

If you are working with a youth customer who has been locked out of their NY.gov account, please call the OSOS help desk at, 518-457-6586.

The OSOS help desk will contact the NYSDOL Contact center for you and put you or the youth in direct communication with a representative at the NYSDOL contact center to assist with resetting the youth’s login information.

This new process will eliminate extensive wait times when calling the contact center directly.
Once the youth customer has logged into their NY.gov account they can access all JobZone features. Some features we’d like to highlight include, assessments, occupational information, budgeting tools, and apprenticeship opportunities.
First assessments, the Self Exploration section of JobZone is where the youth customer can take the different assessments to gain focus on their job search or career and educational aspirations.

<table>
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<th><strong>Self Exploration</strong></th>
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<tr>
<td><strong>Assess Yourself</strong> - Use a simple combination of the six areas of interests to determine a list of occupations that suit you best.</td>
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<tr>
<td><strong>Career Interests</strong> - Need to know what career might be right for you? Enter some activities, and get suggestions of occupations to explore.</td>
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<tr>
<td><strong>Work Values</strong> - What do you need to be happy at work? Rate the importance of various job characteristics, and we’ll recommend occupations you may find rewarding.</td>
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<tr>
<td><strong>Skills Survey</strong> - Find occupations that match the skills you already have, and learn about other skills you may need to obtain.</td>
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<tr>
<td><strong>Work Context Survey</strong> - Explore occupations based on the nature of the work as well as your personal characteristics.</td>
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<tr>
<td><strong>Report</strong> - View a combined summary report of all your assessments.</td>
</tr>
<tr>
<td><strong>Career Advisor</strong> - How well do you match up to occupations? Compare results for multiple assessments and then take the next step.</td>
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</tbody>
</table>
Some of your youth customers may not have extensive work histories or work experience, if this is the case I would recommend the Career Interest Survey to start. The results of this 60-question survey will identify our customers strongest interest areas and recommend job or career fields where those strengths are used based on real data from real people working in these areas.
The assessment is easy to complete and as stated earlier, you could assist your youth by reading questions out loud if they need a reasonable accommodation.
Another useful assessment is the Work Values. It is important to note that an individual should have work experience for the Work values tool to deliver a valid outcome. The tool could still be useful to foster a discussion with your youth customers one-on-one or in a group. It is possible and likely that your youth customers are aware of things they do and don't like.
In addition to the assessments in JobZone the youth customer may also want to explore Occupations.
Information on occupations can be accessed in the Career Exploration box at the bottom of the web page.
Clicking on occupations will allow the youth to search occupations by keyword or complete an advanced search. The youth can narrow search results by selecting options in the fields such as education options or career pathways.
Additional Features: Budgeting Tools
The youth can use the Budget tool in the tool box to help them determine the amount of money they would need to make to support the lifestyle they want.

This budgeting tool is also available in the occupational details page on the left-hand side of the page.
The youth will be asked several questions regarding how much they spend on utilities, food, entertainment etc. the tool will generate a monthly budget based on their answers.
Additional Features: Apprenticeship Opportunities

Apprenticeship opportunities can give youth who are 18 and older the opportunity to learn a trade while earning wages and completing both on-the-job training and classroom training.
Local apprenticeship opportunities will be displayed in the box on the right-hand side of the page.

For additional information on apprenticeships the youth can click the more button which will direct them to a more extensive list of apprenticeship opportunities in their area.
Clicking on the apprenticeship name will display the details and how to apply for the apprenticeship.
Questions about OSOS Tips?

Thank you, Tim!

Now, we would like to open it up to take questions. Please type your questions in chat or unmute the lines to ask live.

See the recording to hear questions and answers.
Thank you for joining us to learn tips about OSOS and JobZone. Please reach out to us for any technical assistance you may need.

Thank you all.