

Employer Search and New Business Jacket OSOS Guide



Table of Contents

Purpose	1
OSOS Data Entry.....	2
Employer Search-Quick Search	3
Employer Search- General Info tab.....	4
Creating a new employer record (business Jacket)	6
New Business Jacket- General Info	7
New Business Jacket - Additional Info	8
New Business Jacket - Contact Info	9
New Business Jacket - Profile.....	10
New Business Jacket - Activity & Job Order.....	11
Saving your business jacket	12
Adding Comments to a business jacket	13
Entering Business Activities in OSOS	14
Onsite OSOS activities.....	15
Services to businesses OSOS activities	16
Recruiting assistance OSOS activities	17
Resources and Assistance	18

PURPOSE

This guide is intended to help staff understand the basics of how to perform an Employer Search and create a New Business Jacket.

It's important to do a thorough search so duplicate records are not created.

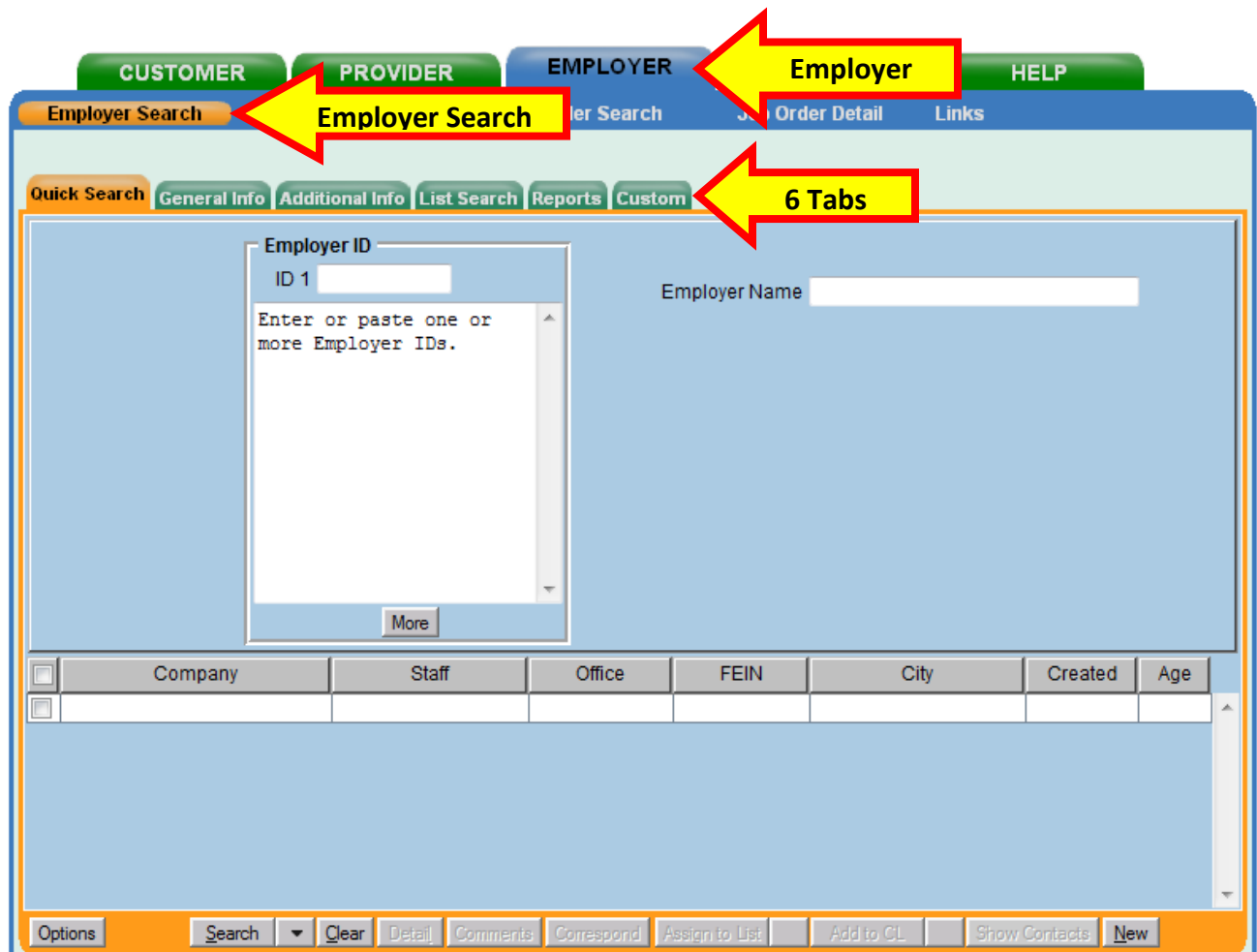
An Employer Search allows you to search for a single employer record or multiple employer records by filling in one or a combination of fields on the Employer Search Screens.

The main reasons to conduct an employer search include:

- Verifying if a particular employer has already been entered into OSOS prior to entering a job order; thus avoiding a duplicate entry
- Search for jobs associated with a particular employer
- Create a business jacket for a job central order to post a match activity

OSOS DATA ENTRY

To conduct a search, from the OSOS Menu Bar, click Employer, then Employer Search. The Employer Search Window contains six tabs: **Quick Search, General Info, Additional Info, List Search, Reports and Custom**. Quick Search and General Info are the most frequently used.



The screenshot shows the OSOS Employer Search window. The top menu bar includes CUSTOMER, PROVIDER, EMPLOYER, and HELP. The EMPLOYER menu is highlighted with a yellow box and labeled "Employer". Below it, the "Employer Search" option is also highlighted with a yellow box and labeled "Employer Search". The main window has six tabs: Quick Search, General Info, Additional Info, List Search, Reports, and Custom. These tabs are highlighted with a yellow box and labeled "6 Tabs". The main content area contains an "Employer ID" field with a sub-field "ID 1" and a text area for entering or pasting multiple IDs. There is also an "Employer Name" field. Below the main content area is a table with columns: Company, Staff, Office, FEIN, City, Created, and Age. At the bottom, there is an "Options" bar with buttons for Search, Clear, Detail, Comments, Correspond, Assign to List, Add to CL, Show Contacts, and New.

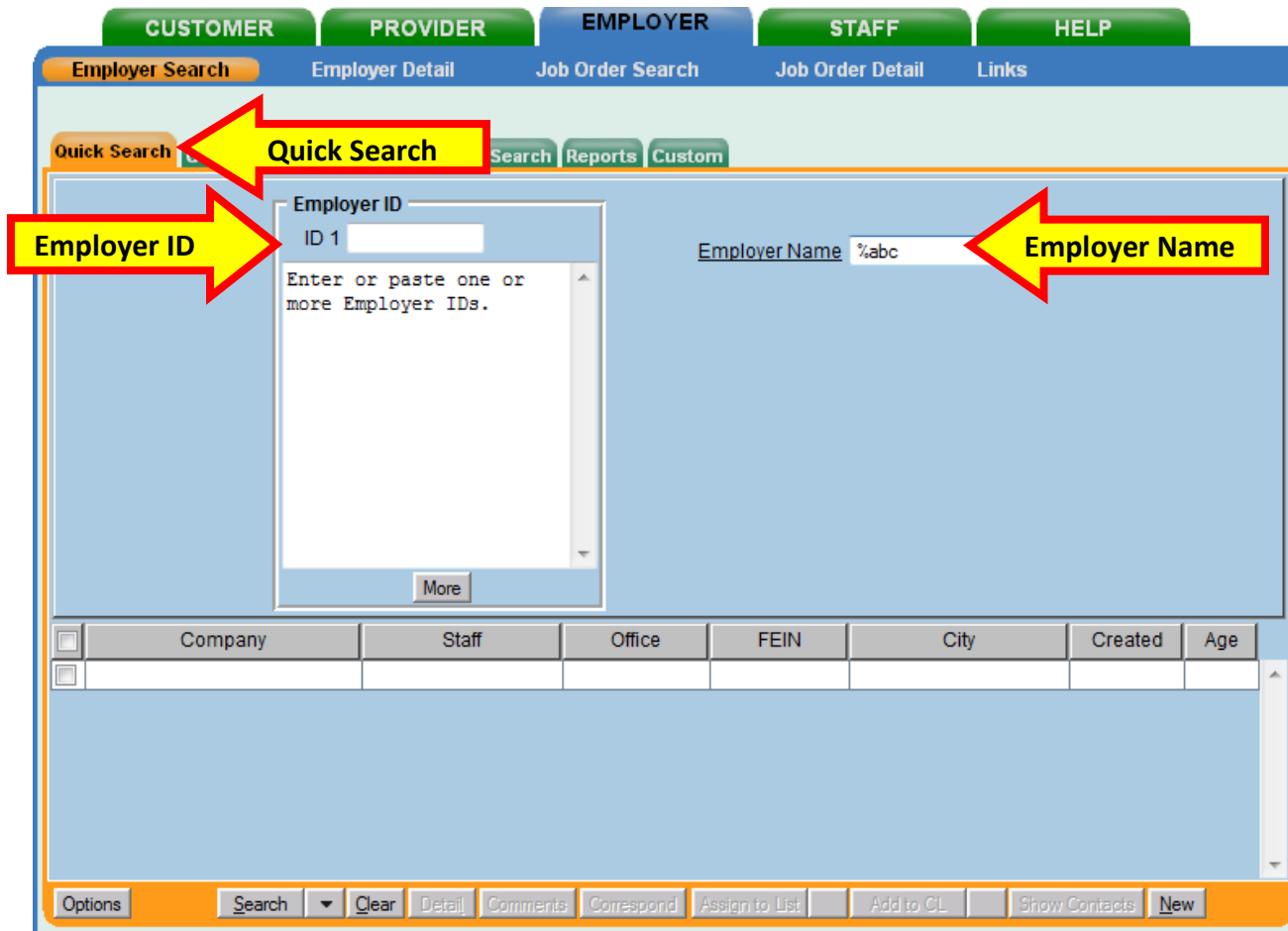
EMPLOYER SEARCH-QUICK SEARCH

Using the employer's NYID number is the most accurate way to search.



Use the % sign in front of some or the entire Employer/Business name to see all iterations of the Employer Name. Employers may be saved under multiple "versions" of the name. For example, Walmart, Wal Mart or Wal-Mart.

If a Company has multiple locations there should be ONE Business name for each location.

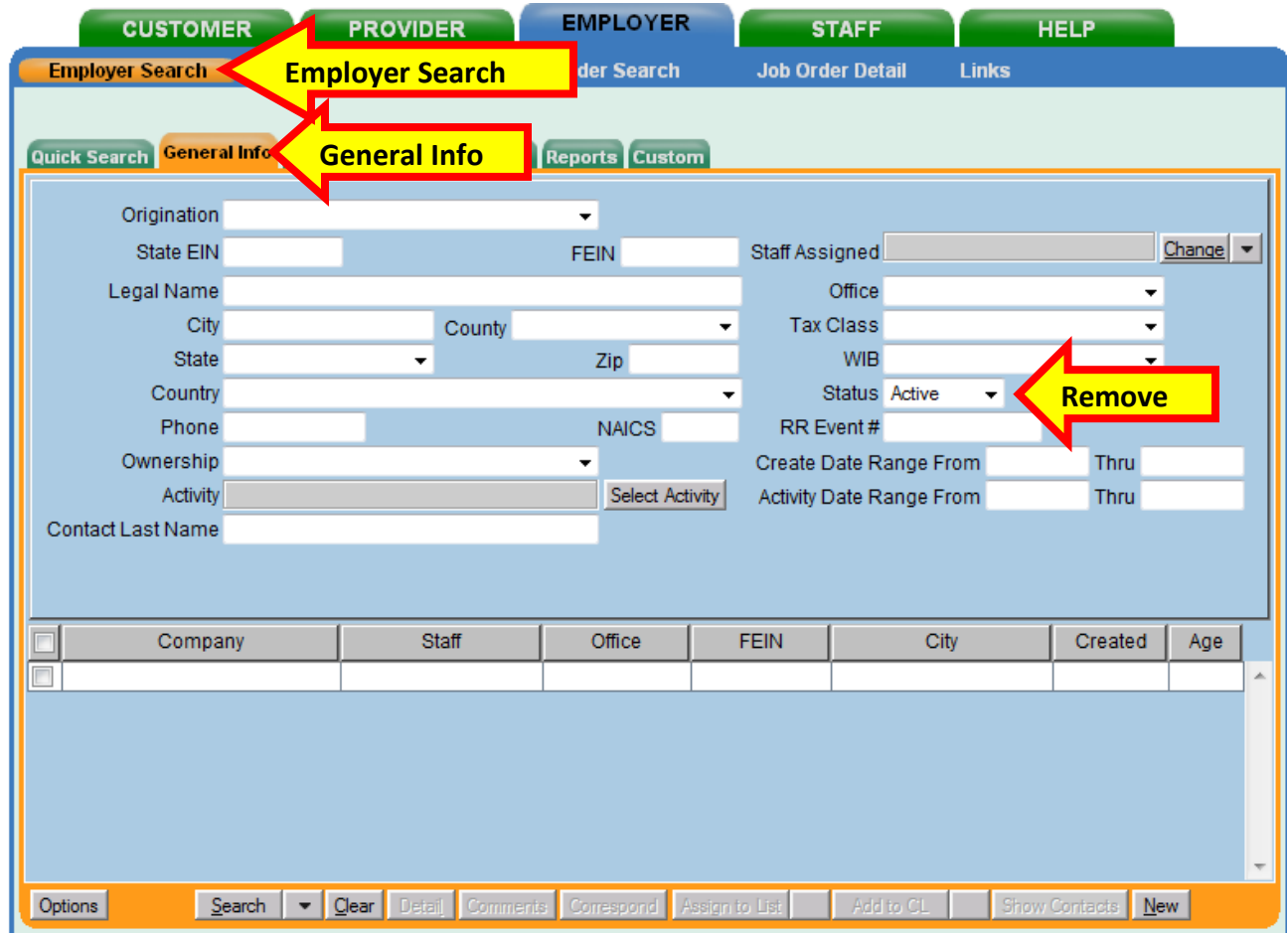


The screenshot shows the OSOS Employer Search interface. At the top, there are navigation tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Employer Search, Employer Detail, Job Order Search, Job Order Detail, and Links. The main search area has a 'Quick Search' tab selected, with sub-tabs for Search, Reports, and Custom. A text input field for 'Employer ID' is labeled 'ID 1' and contains the text 'Enter or paste one or more Employer IDs.' A 'More' button is located below this field. To the right, an 'Employer Name' input field contains the text '%abc'. A table below the search fields has columns for Company, Staff, Office, FEIN, City, Created, and Age. At the bottom, there is an 'Options' section with buttons for Search, Clear, Detail, Comments, Correspond, Assign to List, Add to CL, Show Contacts, and New. Red arrows point to the 'Quick Search' tab, the 'Employer ID' field, and the 'Employer Name' field.



Tip: Try searching for the Employer/Business by using the word "The" as it appears as the first word in many Employer Names.

EMPLOYER SEARCH- GENERAL INFO TAB



On the General Information Tab remove the “Active” in the Status field - “Less is better.”

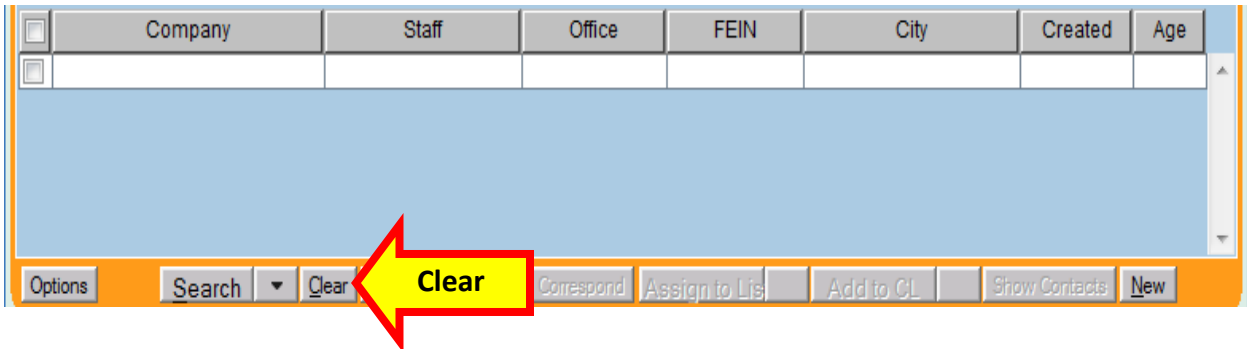
If the desired business is labeled “inactive” change the status to active instead of adding a new Business Jacket. Verify that the Employer's contact information is accurate and update it if necessary.

If search results need to be narrowed search by WIB or City.

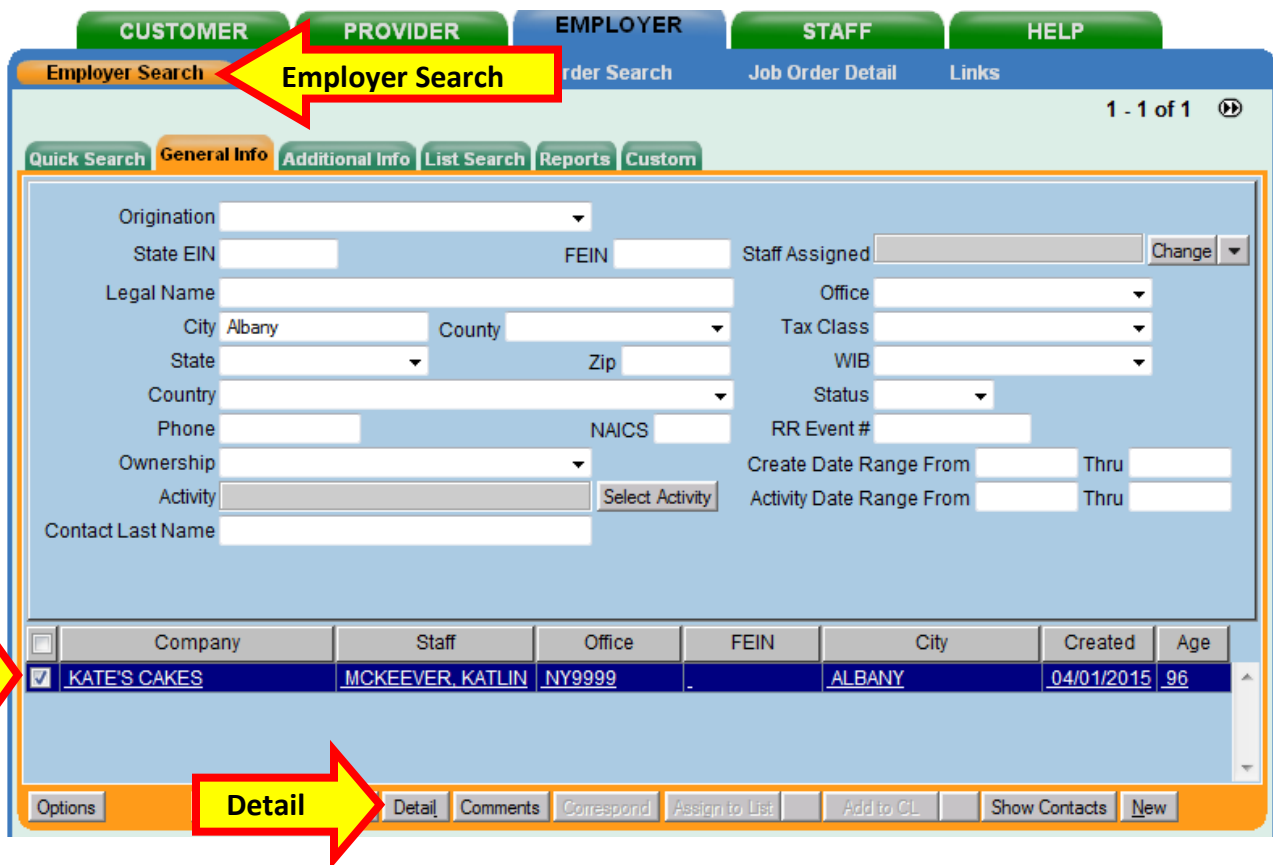


If a business does not receive a service within 180 days the business will automatically become “inactive.”

To clear a search and start a new one, click the Clear button located on the bottom of the screen. This clears out ALL information entered and allows for a new search.



It is not recommended to type over the old information when starting a new search.



The results of the search will appear in the Search Results pane on the **Employer Search** screen. If the business appears in the search results field, click in the box to the left of the employer name and click the grey **Detail** button on the bottom of the screen to view the record. The Detail button will activate once one or more employers from the search results field are selected.



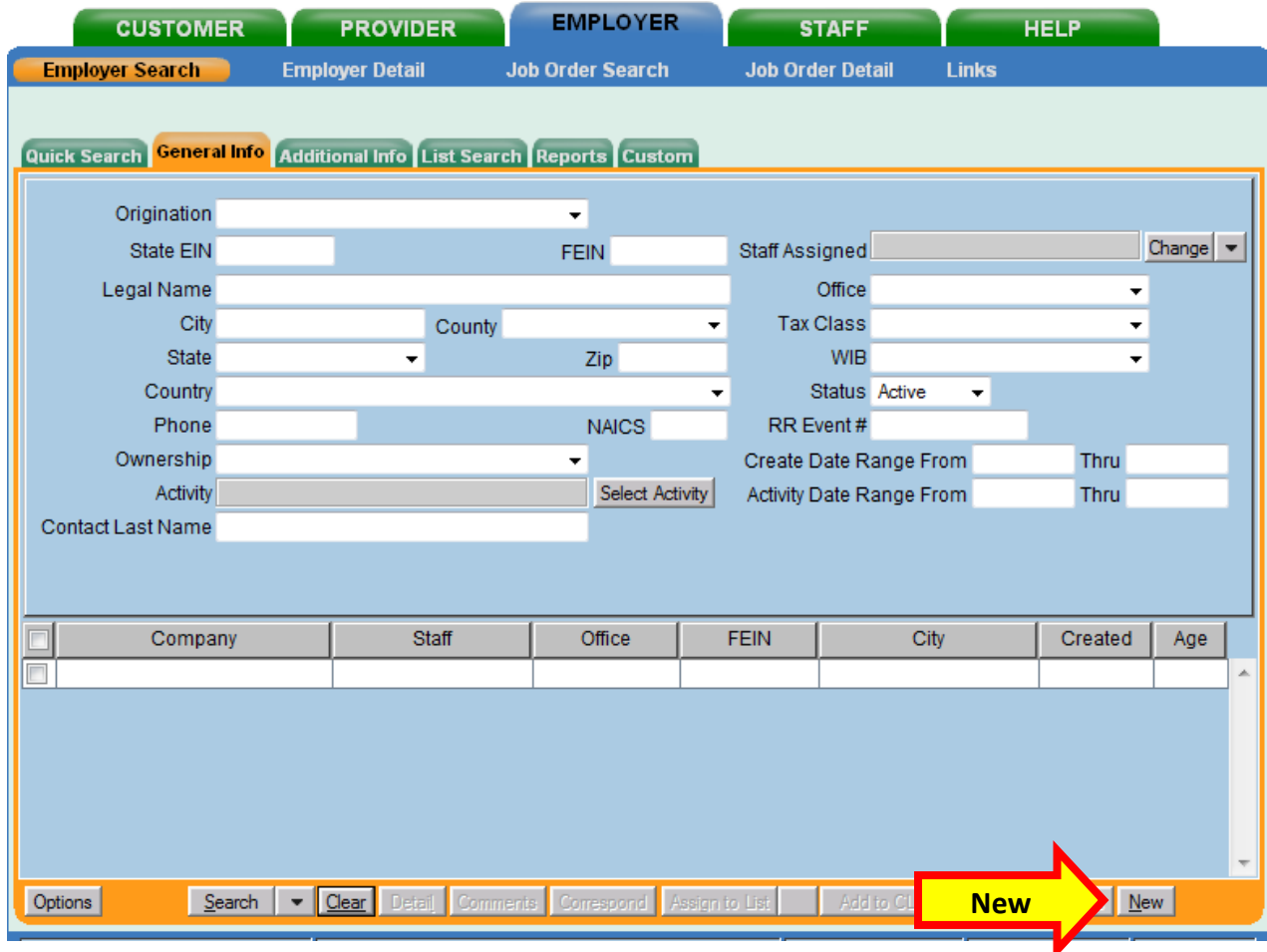
It is best for customer service reasons not to duplicate a business jacket if the business jacket lists a corporate address. If you have a different contact, you can add the contact person to an existing business jacket. If there is more than one business jacket for a corporate record it will be hard to determine if there has been contact by other staff and customer service can be undermined.

If no results are found, click the **New** button to create a new employer record.

CREATING A NEW EMPLOYER RECORD (BUSINESS JACKET)

If an employer does not have a record in OSOS create a new employer record.

A NEW employer record can be created from any Search Window tab by clicking the **New** button at the bottom of the screen.




The screenshot shows the OSOS interface with the following elements:

- Top navigation: CUSTOMER, PROVIDER, **EMPLOYER**, STAFF, HELP
- Sub-navigation: **Employer Search**, Employer Detail, Job Order Search, Job Order Detail, Links
- Search filters: Quick Search, **General Info**, Additional Info, List Search, Reports, Custom
- Form fields:
 - Origination (dropdown)
 - State EIN, FEIN, Staff Assigned (dropdown), Change (dropdown)
 - Legal Name, Office (dropdown)
 - City, County (dropdown), Tax Class (dropdown)
 - State (dropdown), Zip, WIB (dropdown)
 - Country (dropdown), Status (dropdown, set to Active)
 - Phone, NAICS, RR Event #
 - Ownership (dropdown), Create Date Range From/Thru
 - Activity (dropdown), Select Activity, Activity Date Range From/Thru
 - Contact Last Name
- Table with columns: Company, Staff, Office, FEIN, City, Created, Age
- Bottom toolbar: Options, Search (dropdown), Clear, Detail, Comments, Correspond, Assign to List, Add to CL, **New** (highlighted with a yellow arrow), New

Clicking the **New** button will bring up the Employer Detail tabs of the Employer Detail Module.

NEW BUSINESS JACKET- GENERAL INFO

The employers' status must be **Active** to add a new employer. The **Status** data field on the **General Info** screen will be automatically set to **Active** by OSOS for new records.

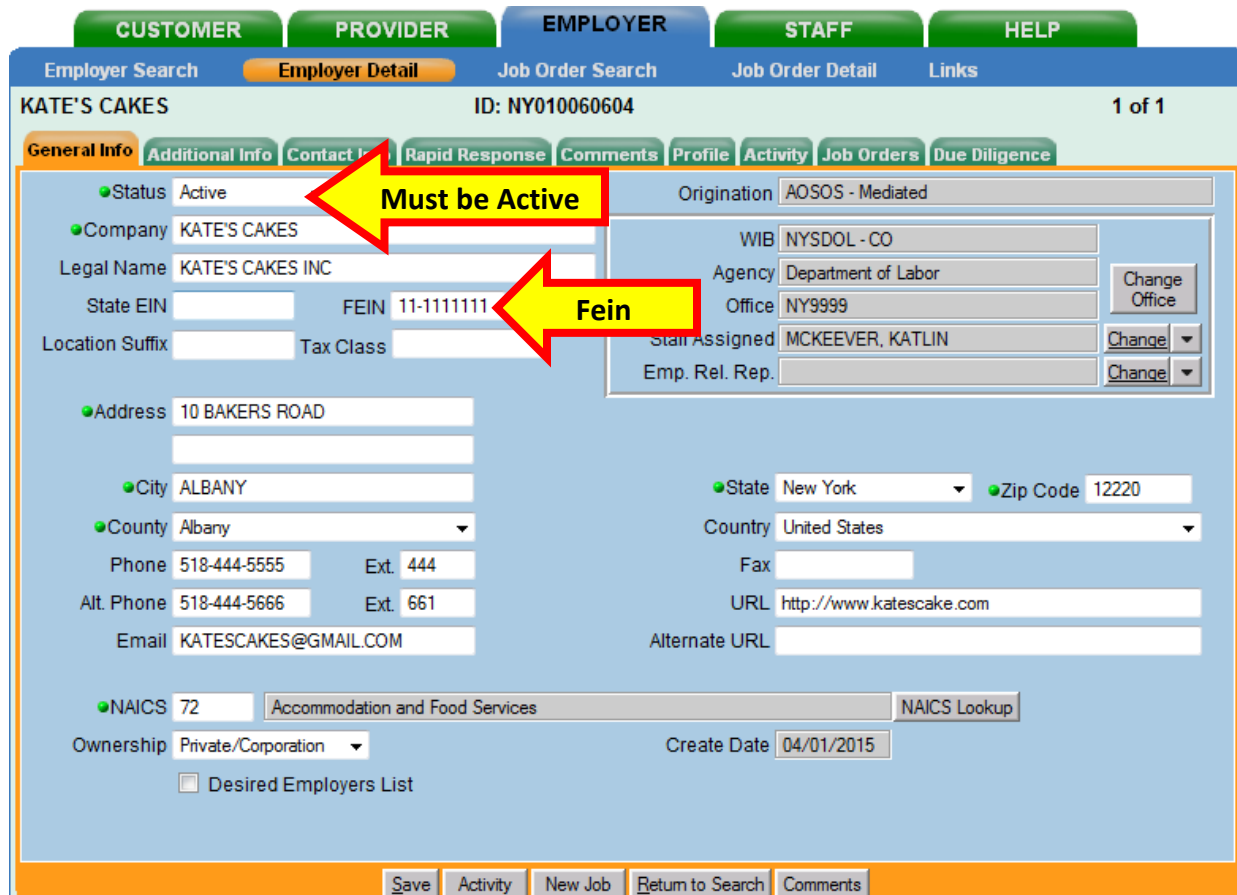
Required information fields are highlighted by a green circle  and must be completed.

The "green circle" required information on the **General Info** and **Contact Info** tabs must be completed in order to save the Business Jacket.

All **FEIN** numbers are mandatory. This is a performance indicator. It is used to track placements for the business and track hires.



If a business does not disclose the FEIN contact Business Services. The FEIN can be acquired through other resources.



The screenshot shows the 'Employer Detail' form for 'KATE'S CAKES' (ID: NY010060604). The 'General Info' tab is active. Two yellow arrows point to specific fields: one to the 'Status' field (set to 'Active') with the text 'Must be Active', and another to the 'FEIN' field (set to '11-1111111') with the text 'Fein'. The form includes various fields for company information, address, contact details, and agency information.

Field	Value
Status	Active
Company	KATE'S CAKES
Legal Name	KATE'S CAKES INC
State EIN	
FEIN	11-1111111
Location Suffix	
Tax Class	
Address	10 BAKERS ROAD
City	ALBANY
County	Albany
Phone	518-444-5555
Ext.	444
Alt. Phone	518-444-5666
Ext.	661
Email	KATESCAKES@GMAIL.COM
NAICS	72 Accommodation and Food Services
Ownership	Private/Corporation
Create Date	04/01/2015
Desired Employers List	<input type="checkbox"/>
Origination	AOSOS - Mediated
WIB	NYSDDL - CO
Agency	Department of Labor
Office	NY9999
Staff Assigned	MCKEEVER, KATLIN
Emp. Rel. Rep.	
State	New York
Zip Code	12220
Country	United States
URL	http://www.katescake.com



Fill in the Phone, Email and URL fields in the General Info tabs. This information can be helpful when researching the business. It will help determine what kind of positions the business is looking to fill, their mission, and their product. Understanding the customer prior to outreach is important!

NEW BUSINESS JACKET - ADDITIONAL INFO

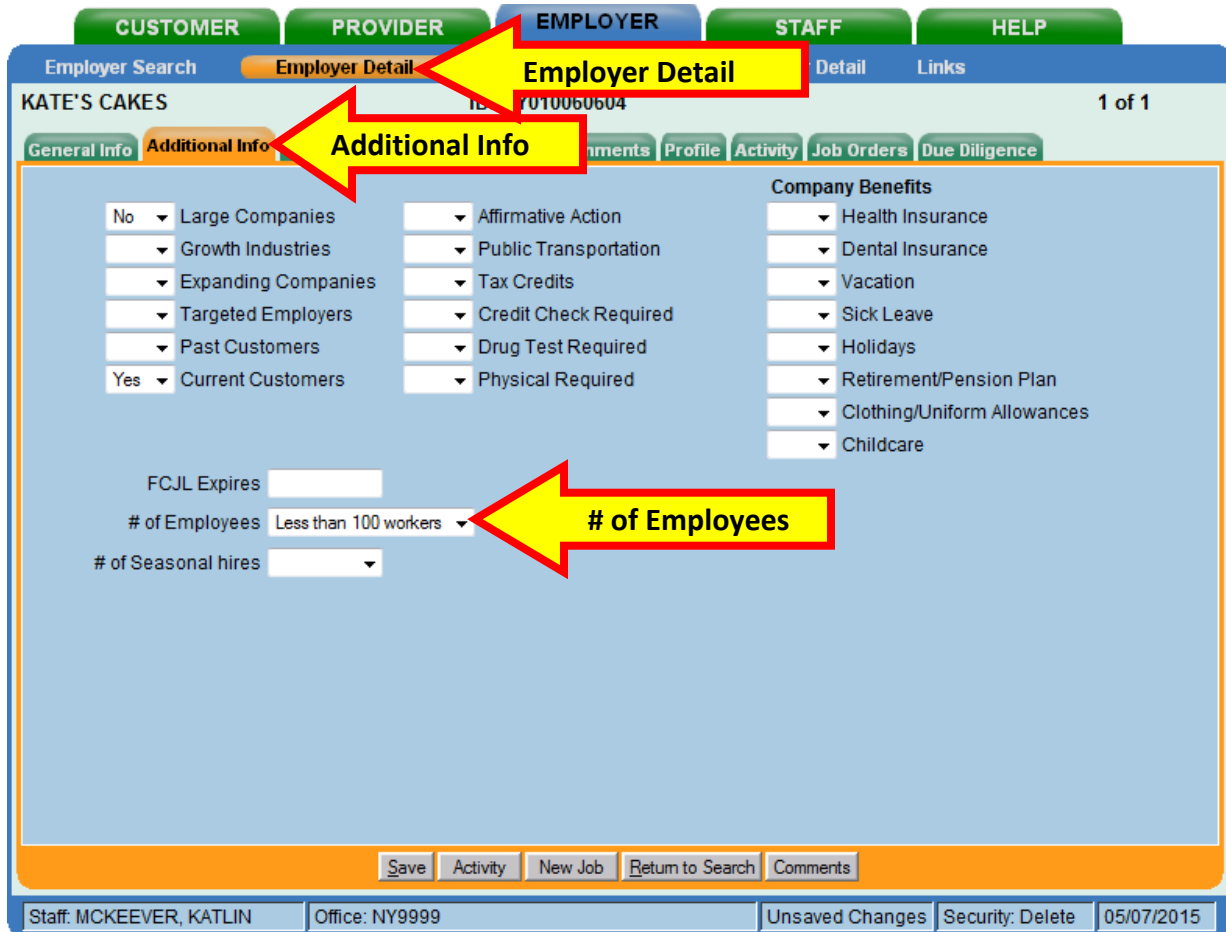
The Additional Info tab has several fields that aren't required to create an employer record but should be marked "Yes" if the information is available.

Click the dropdown arrow next to each field to update & select "Yes."

When the fields are selected "Yes" on the business profile, the benefits will show on all future job orders. Confirm that the benefits are offered for the job order that is being inputted. Be aware that Businesses don't always offer the same benefits for every position.



Enter the Number of Employees and Seasonal Employees (if applicable). It is important to know the number of employees for grant reimbursement rates.



EMPLOYER

Employer Search | **Employer Detail** | Detail | Links

KATE'S CAKES | ID: 010060604 | 1 of 1

General Info | **Additional Info** | Documents | Profile | Activity | Job Orders | Due Diligence

Additional Info

No	Large Companies		Affirmative Action		Health Insurance
	Growth Industries		Public Transportation		Dental Insurance
	Expanding Companies		Tax Credits		Vacation
	Targeted Employers		Credit Check Required		Sick Leave
	Past Customers		Drug Test Required		Holidays
Yes	Current Customers		Physical Required		Retirement/Pension Plan
					Clothing/Uniform Allowances
					Childcare

FCJL Expires:

of Employees:

of Seasonal hires:

of Employees

Save | Activity | New Job | Return to Search | Comments

Staff: MCKEEVER, KATLIN | Office: NY9999 | Unsaved Changes | Security: Delete | 05/07/2015

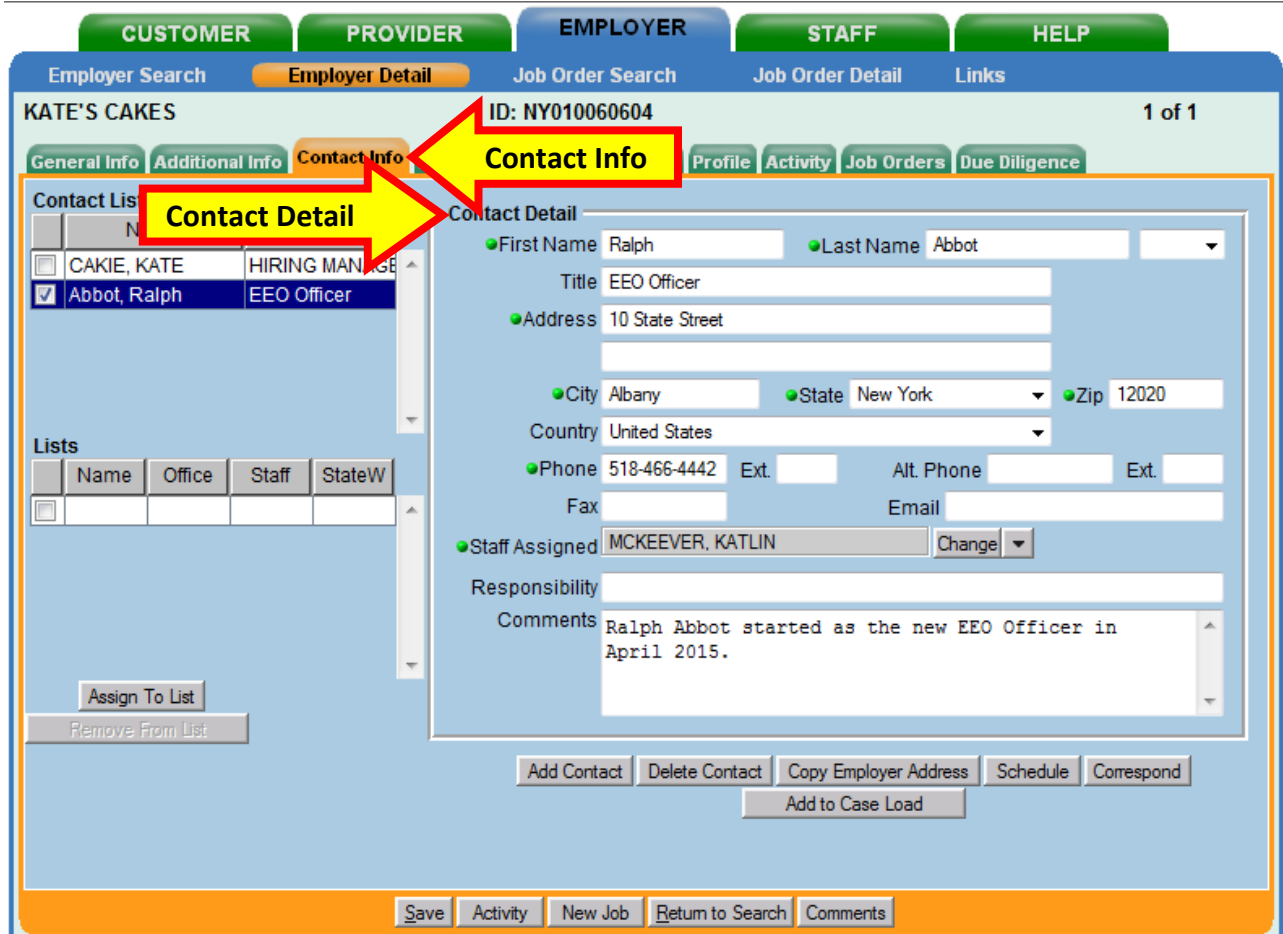
NEW BUSINESS JACKET - CONTACT INFO

At least one employer contact person is required. If multiple contacts are created, the first contact will be the default contact. The contact information is carried over into job orders' associated with the employer.

Enter all required fields in the contact detail section. The **Title** field is not required but recommended for future reference. (i.e. hiring manager, HR manager etc)



For LVER staff an EEO Officer is a valuable contact



OSOS
One-Stop Operating System

CUSTOMER PROVIDER **EMPLOYER** STAFF HELP

Employer Search **Employer Detail** Job Order Search Job Order Detail Links

KATE'S CAKES ID: NY010060604 1 of 1

General Info Additional Info **Contact Info** Profile Activity Job Orders Due Diligence

Contact Info

Contact Detail

Name	Office	Staff	StateW
<input type="checkbox"/> CAKIE, KATE	HIRING MANAGER		
<input checked="" type="checkbox"/> Abbot, Ralph	EEO Officer		

Lists

Name	Office	Staff	StateW
<input type="checkbox"/>			

Assign To List
Remove From List

Contact Detail

First Name: Ralph Last Name: Abbot
 Title: EEO Officer
 Address: 10 State Street
 City: Albany State: New York Zip: 12020
 Country: United States
 Phone: 518-466-4442 Ext. Alt. Phone Ext.
 Fax Email
 Staff Assigned: MCKEEVER, KATLIN Change
 Responsibility
 Comments: Ralph Abbot started as the new EEO Officer in April 2015.

Add Contact Delete Contact Copy Employer Address Schedule Correspond
 Add to Case Load

Save Activity New Job Return to Search Comments

NEW BUSINESS JACKET - PROFILE

Enter the Business Type, Mission, Business Description and Business interests on the Profile tab.



The screenshot displays the OSOS interface for an employer profile. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail (selected), Job Order Search, Job Order Detail, and Links. The main header shows "KATE'S CAKES" with ID: NY0100606 and "1 of 1". A secondary set of tabs includes General Info, Additional Info, Contact Info, Rapid, Profile (selected), Activity, Job Orders, and Due Diligence. The Profile tab contains four sections: Mission (text: "TO PROVIDE CUSTOMERS WITH GREAT BAKED GOODS WHILE PROVIDING THE BEST CUSTOMER SERVICE."), Business Type (dropdown menu showing "Accommodation and Food Service"), Business Description (text: "BAKERY"), and Business Interests (text: "BUSINESS IS LOOKING TO EXPAND AND IS LOOKING TO HIRE VETERANS"). At the bottom, there are buttons for Save, Activity, New Job, Return to Search, and Comments.

Although this information is not required to save the new business jacket, information recorded here can be helpful for staff to identify businesses that have indicated a preference for hiring veterans; federal contractors etc.



Refer to the business's website when filling out the Profile tab

Listing past titles hired will be helpful for future Job Development leads.



NEW BUSINESS JACKET - ACTIVITY & JOB ORDER

The Activity tab will record any OSOS activities provided to the employer by staff after the business jacket is created.

The screenshot shows the OSOS interface for 'KATE'S CAKES' with ID: NY010060604. The 'EMPLOYER' tab is selected. The 'Activity' tab is highlighted with a yellow arrow. The table below shows one activity record.

Date	Activity	Employer Rep.	Emp. Cont.	Staff	VETS	Comments
04/01/2015	Employer Company Prof		CAKIE, KATE	MCKEEVER, KATI		

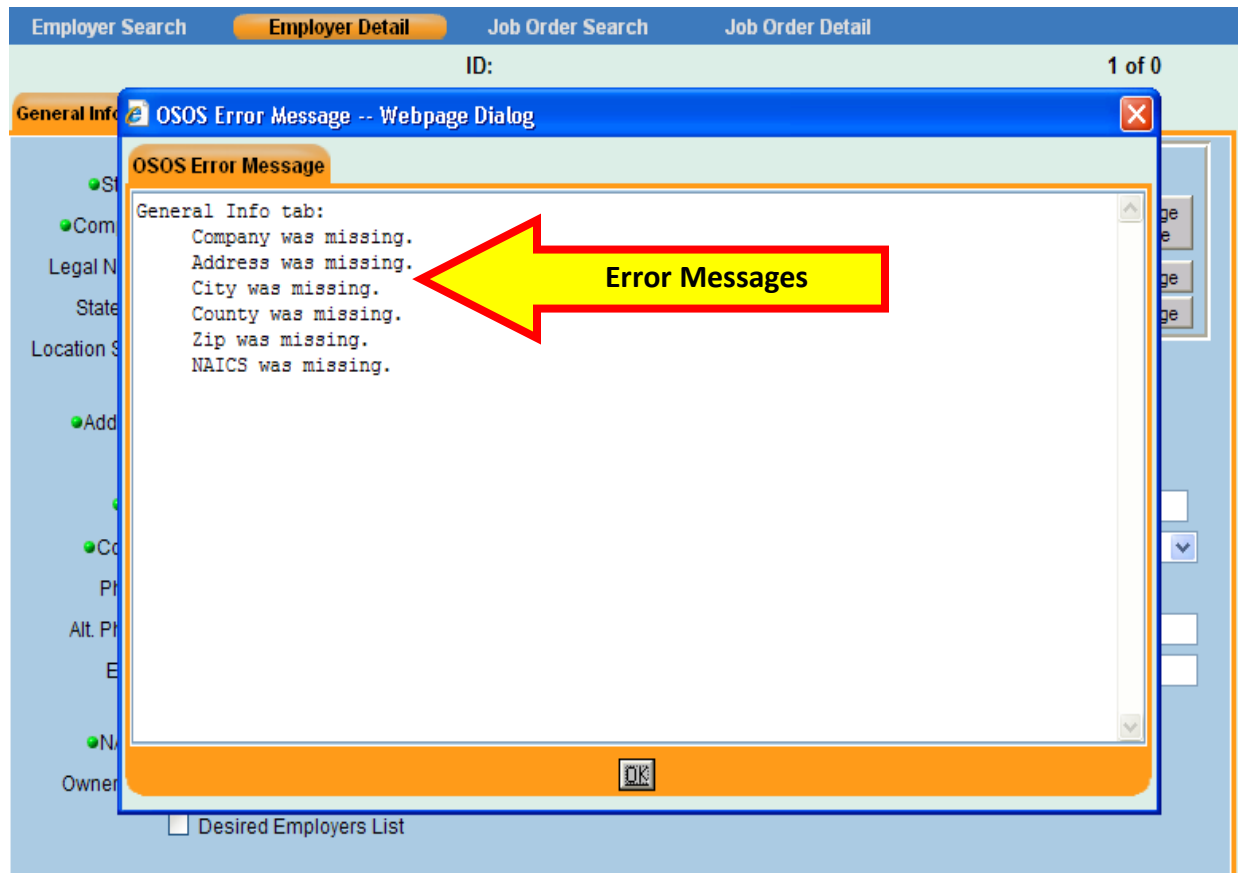
The Job Order tab will contain all the staff entered job orders which will be indicated by an **NY**.

The screenshot shows the OSOS interface for 'KATE'S CAKES' with ID: NY010060604. The 'EMPLOYER' tab is selected. The 'Job Orders' tab is highlighted with a yellow arrow. The table below shows job order details.

Order #	Job Title	Office	Status
Listing Date	O*Net Title	Staff Assigned	Contact Name

SAVING YOUR BUSINESS JACKET

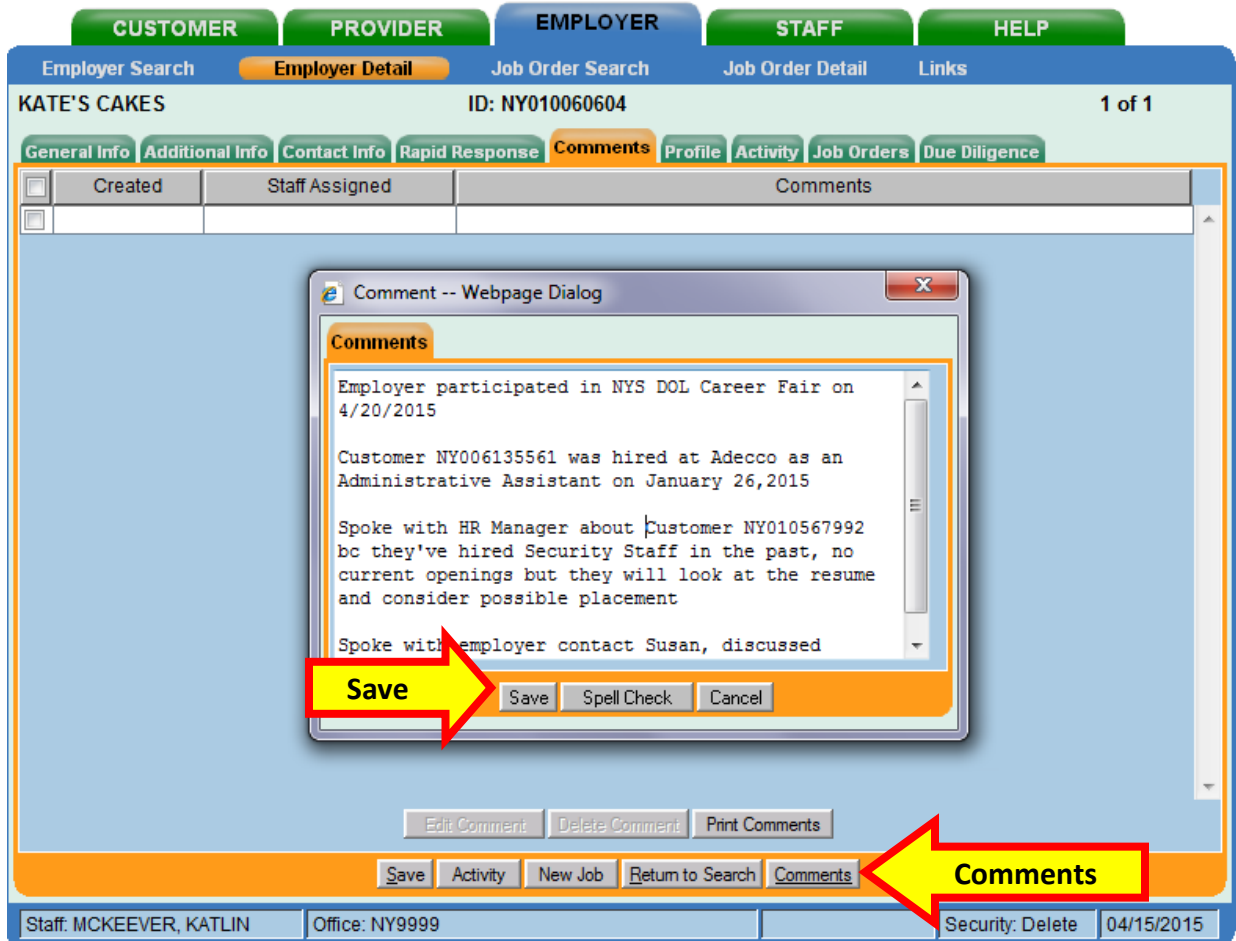
A new employer record cannot be saved until all of the required information is completed. An error pop-up message will appear if any required information has not been entered.



ADDING COMMENTS TO A BUSINESS JACKET

Be sure to include comments when any services or information is provided to a business.

Recording comments will improve communication between staff to prevent any overlapping of outreach.



The screenshot displays the OSOS web application interface. At the top, there are navigation tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, a sub-navigation bar includes Employer Search, Employer Detail (selected), Job Order Search, Job Order Detail, and Links. The main header shows 'KATE'S CAKES' with ID: NY010060604 and '1 of 1' results. A secondary navigation bar contains General Info, Additional Info, Contact Info, Rapid Response, Comments (selected), Profile, Activity, Job Orders, and Due Diligence. A table with columns 'Created', 'Staff Assigned', and 'Comments' is visible. A 'Comment -- Webpage Dialog' window is open, containing the following text: 'Employer participated in NYS DOL Career Fair on 4/20/2015', 'Customer NY006135561 was hired at Adecco as an Administrative Assistant on January 26,2015', 'Spoke with HR Manager about Customer NY010567992 bc they've hired Security Staff in the past, no current openings but they will look at the resume and consider possible placement', and 'Spoke with employer contact Susan, discussed'. A red arrow points to the 'Save' button in the dialog. Below the dialog, there are buttons for 'Edit Comment', 'Delete Comment', and 'Print Comments'. At the bottom of the application, there are buttons for 'Save', 'Activity', 'New Job', 'Return to Search', and 'Comments' (highlighted with a red arrow). The footer shows 'Staff: MCKEEVER, KATLIN', 'Office: NY9999', 'Security: Delete', and '04/15/2015'.

ENTERING BUSINESS ACTIVITIES IN OSOS

For help with recording business activities see:

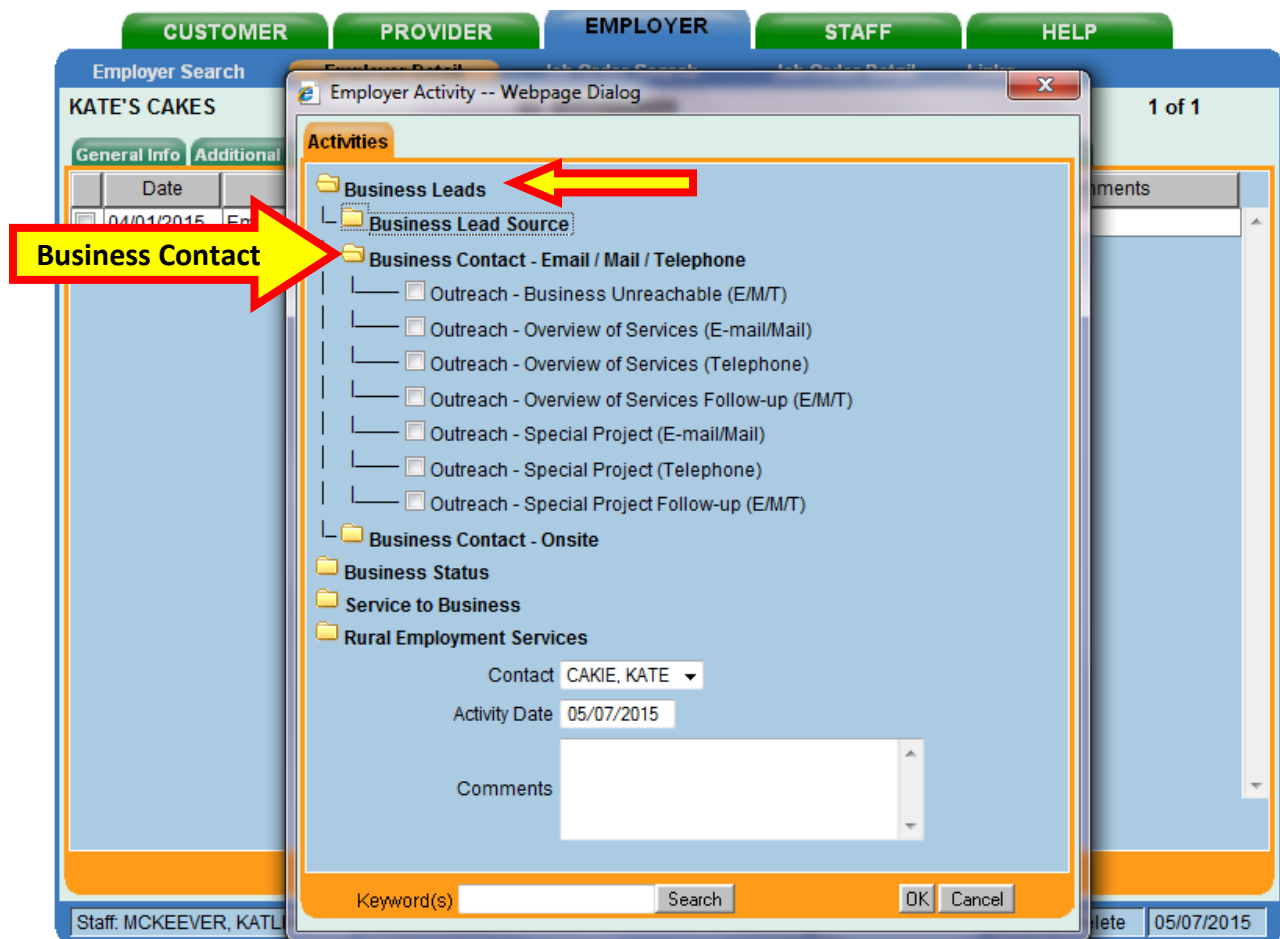
<http://labor.ny.gov/workforcenypartners/osos/OSOS-Employer-Services.pdf>

As Business Outreach occurs track the following items on the business jacket.

Click the Business Leads folder to view the Business Contact Email/ Mail/ Telephone folder.

In the Business Contact – E/M/T (Email/Mail/Telephone) folder record your method of contact.

Most initial outreach will be an overview of services.



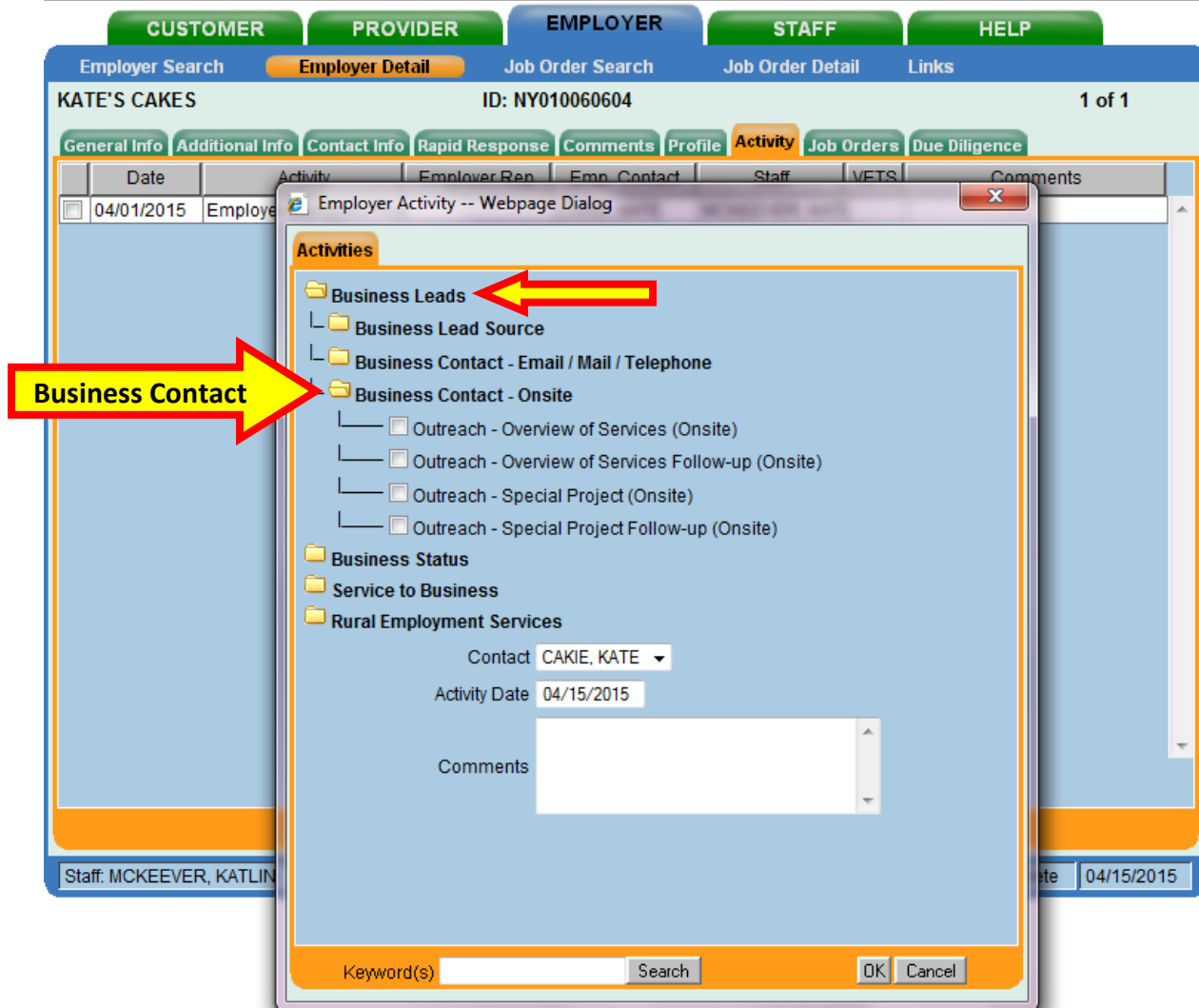
Quality outreach is speaking to someone from the business. Leaving a message does not count as an outreach activity. To track these outreach efforts record the Outreach-Business unreachable activity.

ONSITE OSOS ACTIVITIES

Record these activities from onsite outreach.

Click the Business Leads folder to view the Business Contact- Onsite folder

Field visits need to be approved in advance and need to be strategic – plan multiple visits on one day in an area to make the trip as productive as possible.

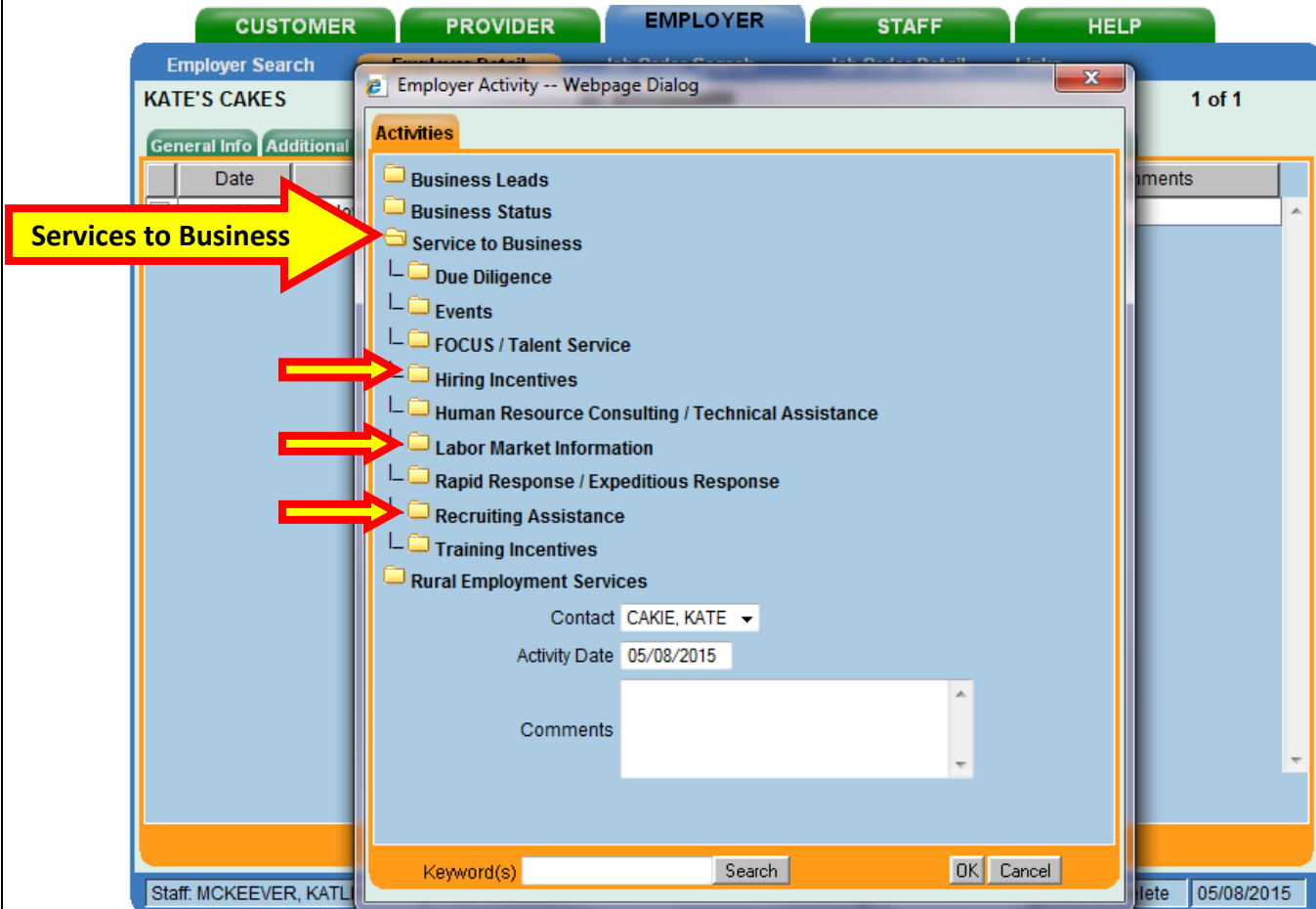


The screenshot displays the OSOS interface for an employer named "KATE'S CAKES" (ID: NY010060604). The "Activity" tab is selected, and an "Employer Activity -- Webpage Dialog" is open. The dialog shows a tree view of activities, with "Business Leads" and "Business Contact - Onsite" highlighted by red arrows. The "Business Contact - Onsite" folder is expanded, showing sub-items like "Outreach - Overview of Services (Onsite)". The dialog also includes fields for "Contact" (CAKIE, KATE), "Activity Date" (04/15/2015), and a "Comments" text area.

SERVICES TO BUSINESSES OSOS ACTIVITIES

Under Services to Businesses focus on:

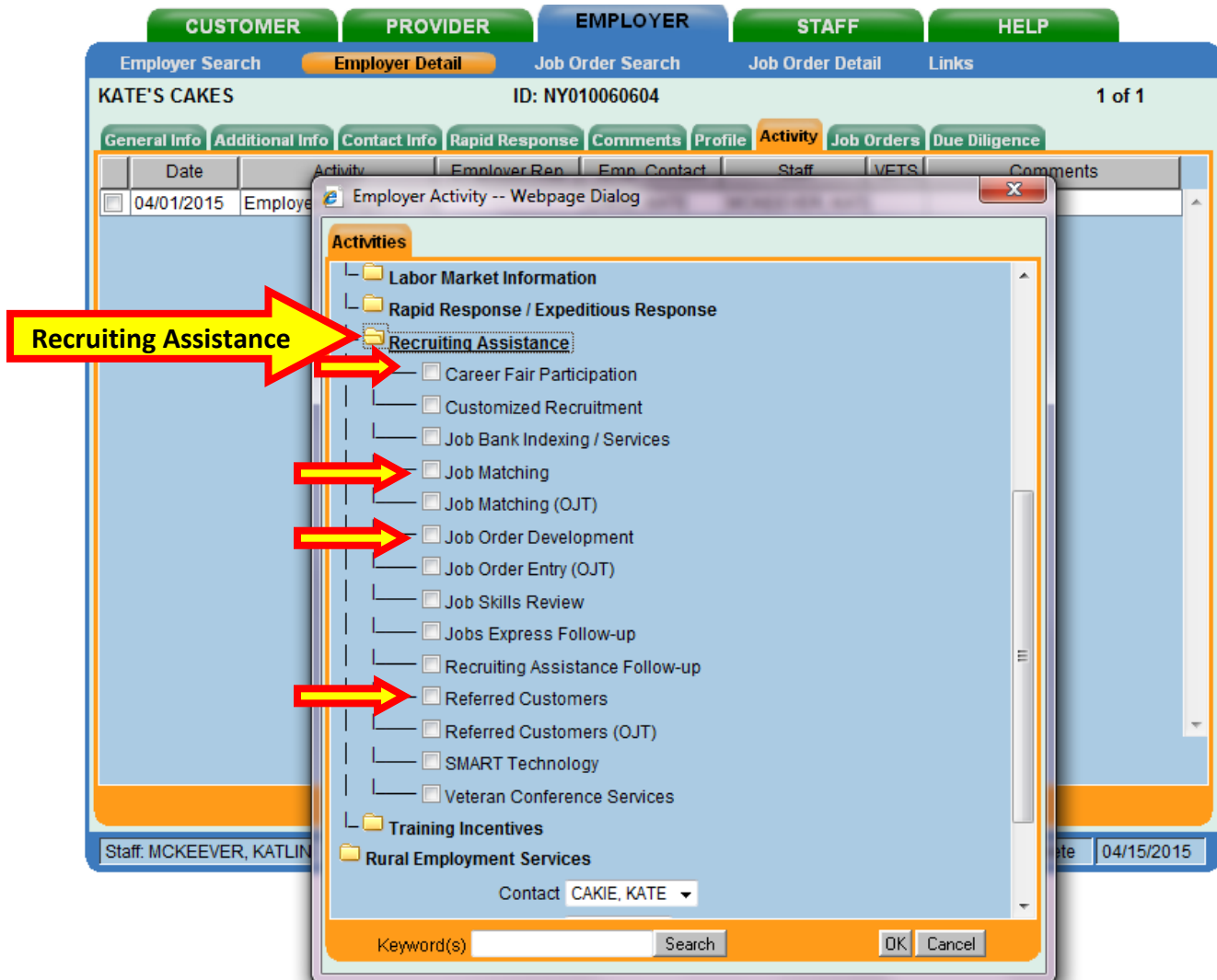
- Hiring Incentives
- Labor Market Information
- Recruiting Assistance



RECRUITING ASSISTANCE OSOS ACTIVITIES

Under Recruiting Assistance focus upon:

- Career Fair Participation
- Job Matching
- Job Order Development
- Referred Customer



Recruiting Assistance

- Recruiting Assistance
 - Career Fair Participation
 - Customized Recruitment
 - Job Bank Indexing / Services
 - Job Matching
 - Job Matching (OJT)
 - Job Order Development
 - Job Order Entry (OJT)
 - Job Skills Review
 - Jobs Express Follow-up
 - Recruiting Assistance Follow-up
 - Referred Customers
 - Referred Customers (OJT)
 - SMART Technology
 - Veteran Conference Services



If a business contact expresses interest in other services direct them to a Business Services Representative.



RESOURCES AND ASSISTANCE

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

<http://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