

Essentials of Job Matching



- Good afternoon! My name is Ruth Pillittere and I work in the Business Services Unit here in Albany. Presenting with me today is Brian Suedkamp, the Capital Region Associate Business Services Representative.
- We have a lot of information to cover today so we will be holding all questions until the end of the presentation. If you have something you'd like to ask, please submit your question using the Chat Feature.



Today we will cover:

- 1. Quality Customer Record**
- 2. Matching from the Customer Record**
- 3. Matching from the Job Order**
- 4. Referrals**

Today we will walk you through the various steps needed to match a customer to a job order – as well as matching a job order to a customer. We will also walk you through how to post a referral once a match has been made and saved.

But first we will start with the customer record.

Customer Records

- Need to ensure quality information in the customer record.
- Job match is only as good as the information in the customer record.
- Prior work experience and education are key elements for a good job match.

It is very important that you have complete information in the customer's record in order to have a quality job match.

If you are meeting with a customer and you notice missing fields, ask those questions and enter those fields.

Job Orders often list specific educational requirements or a required number of years of past experience.

Without a complete record we will be unable to perform quality matches:

- A good person may not come up on your match
- If they do, you will not be able to validate certain data elements to determine if they are really qualified for the position

Quality Customer Record

The screenshot displays the OSOS Quality Customer Record interface for Judy M. Malinak. The interface is organized into several sections:

- Navigation:** Tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Sub-tabs include Customer Search, Customer Detail (active), Comp Assess, Services, and JobZone.
- Customer Information:** Malinak, Judy M., SSN: OSOS ID: NY010623283, 1 of 1.
- General Info Tab:** Contains fields for SSN (N/A), Status (Active), Job Seeker (Active), Username (mal12), Password (mack13), Last Name (Malinak), First Name (Judy), Date of Birth (07/15/1981), Gender (Female), Portfolio Lvl. (JobZone Adult), Address (17 Glen Street), City (Troy), State (New York), Zip (12180), County (Rensselaer), Country (United States), Metro, Phone (518-123-6549), Alt (518-321-6549), Fax, Email (kerry.douglas-duffy@labor.ny.gov), and URL.
- Demographics:** Ethnic Heritage (Hispanic or Latino, Not Hispanic or Latino, Not Disclosed), Race (Alaskan or American Indian, Asian, Black or African American, Hawaiian or Pacific Islander, White, Not Disclosed).
- Education & Employment:** Education Level (HS + 1 yr coll. or voc/tech - no degree), School Status (Not attending school; H.S. Graduate), Employment Status (Employed).
- Contact Preferences:** Use Postal (checked), Fax (unchecked), Pri. Phone (checked), Email (checked), Alt. Phone (checked), Resume Contact Info (checked).
- Customer Assignment:** Staff Assigned (DOUGLAS-DUFFY, KERRY), Change, Registered (08/05/2009), WIB Assigned (NYS DOL - CO), Origin (Staff), Agency (Department of Labor), Change Office, Office (NY9999), Profiled Date, UI Claimant (None (Not Claiming UI)), Internet Resume (unchecked), Confidential (unchecked).
- Enrollments:** JZ/CZ Manager (unchecked).
- Footer:** Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, Message.

For today's training we are using a fictitious record.

General Info

When updating or entering a new customer record in OSOS, always think to yourself "What do I need to add so that we can make quality job matches for this customer?" on the general info tab pay special attention to education, contact information and status. When meeting with the customer ask if their educational status has changed, maybe they completed a degree program from the last time we met with them. You will also need accurate address, phone and email information on the customer. You will also want to make sure that the customer's status and Job Seeker status is set as active.

Quality Customer Record

The screenshot displays the 'Quality Customer Record' interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail (selected), Comp Assess, Services, and JobZone. The customer's name is Malinak, Judy M., with SSN and OSOS ID fields. A navigation bar includes Gen. Info, Add'l Info, Objective, Work Hist., Ed/Lic, Skills, Saved Searches, Activities, Comments, Tests, and Primary Language. The main content area is divided into several sections: Programs (with a dropdown for Public Assistance Selection), Income Status (with dropdowns for Lower Living Standard, Income 70% LLSIL, and Local Priority), Disability Status (radio buttons for Not Disabled, Migrant/Seasonal Worker), Military Service (radio buttons for Service Veteran), Employment Preferences (with dropdowns for Work Week, Duration, Pay Unit, and a text field for Date Available), and Shift Preference (with radio buttons for Work Any Shift and checkboxes for First, Second, Third, Split, and Rotating Shift). A Customer List Participation section on the right has a list name field and Assign To List/Remove buttons. At the bottom, a toolbar contains buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Bet to Srch, Comments, Tag, Resume, Sched, and Message.

Additional Info

Employment Preference is completed – FT work on First Shift at \$12 an hour. Make sure this information is current.

We also know that this person is not disabled, not a migrant worker and not a veteran

Quality Customer Record

The screenshot displays the 'Objective' tab for a customer named Malinak, Judy M. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below the navigation bar, there are tabs for Customer Search, Customer Detail (selected), Comp Assess, Services, and JobZone. The main content area shows the following details:

- Customer Search:** Malinak, Judy M. SSN: OSOS ID: NY010623283 1 of 1
- Objective:** To obtain a position as a payroll clerk (NOT REAL PERSON)
- Desired O*Net:** O*Net Title: 43305100 Payroll and Timekeeping Clerks. Experience: Year(s) 7, Month(s) 0. A table lists O*Net titles and experience in months.
- Acceptable Job Locations:** Maximum Zip Radius: Within 25 miles of ZIP 12180. Options for 'Or Anywhere in the following states' and 'Or outside the United States' are provided.
- Desired Employers:** A table for listing companies.

At the bottom, there is a navigation bar with buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Get to Strch, Comments, Tag, Resume, Sched, and Message.

Objective

On the customer's objective tab we are concerned with correct O*net titles. O*net titles will directly impact a quality match. We suggest having at least two O*Net titles. For more information on how to use the O*Net functions in OSOS please refer to the Using O*net in OSOS guide that is located on the internet under the workforce professionals section.

In this example we see this person is interested in a payroll clerk position.

We also see that they have past experience which is useful information when an order requires a set amount of past experience as a minimum qualification.

Employment Objective: This section is often left blank and it's important to complete it so we really know the type of work the individual is interested in pursuing. Becomes important when a person is changing careers – we don't want to match to a prior field if no longer interested in that type of work.

Quality Customer Record

Customer Search: Malinak, Judy M. SSN: OSOS ID: NY010623283 1 of 1

Customer Detail

Job Title: Payroll Clerk
Employer: Met Life Insurance
Address: 12 Fake St
City: Rensselaer
State: New York
Country: United States
Job Type: Full Time
NAICS: []

Start Date: 10/2002
End Date: 06/2009
Wage: \$ 35000.00
Reason for Leaving: Lack of work
Job Duties: Compile and post employee time and payroll data. Computed employees' time worked.

Job	Company	City	Start	End
<input type="checkbox"/> Payroll Clerk	Met Life Insurance	Rensselaer	10/2002	06/2009
<input type="checkbox"/> Receptionist	ABC Company	Schenectady	08/2009	06/2012

Work History

We see two past jobs – one as a payroll clerk and one a receptionist. Remember the objective was to gain employment as a payroll clerk so you should not be matching them for receptionist jobs.

You also get a sense of past job duties so you start to get a picture of their skill sets; salary range and reason for leaving.

Make sure that each job entry is complete with job duties listed. When identifying possible job matches need to look at the typical duties for the position vs. what customer did in past positions.

Quality Customer Record

The screenshot displays the 'Quality Customer Record' interface for a customer named Malinak, Judy M. The system is currently on the 'Lic' (Licenses) tab, which is highlighted in orange. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below the navigation bar, there are sections for 'Driver License', 'Certificates / Licenses', 'Schools', and 'Professional Associations'. The 'Schools' section is highlighted with a red box. The 'Schools' section contains a table with columns for Course of Study, Degree, Completed, Issuing Institution, State, and Country. Below the table are buttons for 'Add School', 'Edit School', and 'Delete Selection'. The 'Professional Associations' section also contains a table with columns for Association Name, Position, Description, and Date Received, along with buttons for 'Add Association', 'Edit Association', and 'Delete Selection'. At the bottom of the interface, there is a row of buttons for 'Save', 'Start Match', 'Services', 'Comp Assess', 'Activity', 'I.A. Referrals', 'Correspond', 'IVR', 'Ret to Srch', 'Comments', 'Tag', 'Resume', 'Schd', and 'Message'.

Education and License:

The Education tab also has a big impact on a match. If the customer's record indicates that they have an advanced degree such BA, BS or masters listed on their general detail tab, the school section should also be completed.

When a job order required a degree they will generally list the degree areas and study they are looking for. So for instance if we have a customer that is an Engineer that has a BS, we need the School section completed to indicate the actual degree program/course of study. There is a big difference from the civil engineer to the electrical or chemical engineer, and we can not finish the match if we do not know if they meet the minimum quals.

Quality Customer Record

The screenshot displays a web-based interface for a 'Quality Customer Record'. At the top, there are navigation tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, a sub-navigation bar includes Customer Search, Customer Detail (selected), Comp Assess, Services, and JobZone. The main header area shows the customer's name 'Malinak, Judy M.', SSN, OSOS ID: NY010623283, and '1 of 1' records. A secondary navigation bar contains tabs for Gen. Info, Add'l Info, Objective, Work Hist., Ed. Lic., Skills (selected), Saved Searches, Activities, Comments, Tests, and Primary Language. The Skills section is expanded, showing 'Additional Skills Text' with the text: 'Windows XP:MS Word, Excel, Access, Peoplesoft, Kronos software, writing job aids/desk guides, training staff, Notes: college credits in liberal arts from Hudson Valley Community College.' Below this are sections for Honors & Activities, Qualifications, and Awards, each with a table structure for adding, editing, or deleting entries. The bottom of the interface features a toolbar with buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.

Skills:

The skill section is especially important for our customers that do not have degrees. We need to make sure they have the skills required for the job. This section should list specific tools the customer is skilled in as well. So for instance, in this example our customer does not have a degree but she has experience with key software tools for her occupation of payroll clerk.- Peoplesoft, kronos software

Quality Customer Record

The screenshot displays a web-based interface for a 'Quality Customer Record'. At the top, there are navigation tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, a sub-menu includes Customer Search, Customer Detail (selected), Comp Assess, Services, and JobZone. The main header shows the customer name 'Malinak, Judy M.', SSN, OSOS ID: NY010623283, and '1 of 1' records. A secondary menu contains Gen. Info, Add'l Info, Objective, Work Hist., Ed/Lic, Skills, Saved Searches, Activities, Comments (selected), Tests, and Primary Language. The main content area features a table with columns for 'Created', 'Staff Assigned', and 'Comments'. A single record is visible, dated 08/06/2009, assigned to DOUGLAS-DUFFY, KERRY. The comment text reads: 'CDS: Customer stated she would like to redefine her occupational goal prior to job search. K/S/A to support occupation as a Payroll Clerk, occupation not in demand for local labor market. Presented with basic chronological resume lacking skills, responsibilities and accomplishments. Verbally described skills and job duties well during initial assessment. Next Steps: Referred to Advanced Resume Writing Workshop on 7/8/09 2pm & Individual Career Counseling on 7/13/09 9am.' Below the table are buttons for 'Edit Comment', 'Delete Comment', and 'Print Comments'. At the bottom, a row of buttons includes Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.

Created	Staff Assigned	Comments
08/06/2009	DOUGLAS-DUFFY, KERRY	CDS: Customer stated she would like to redefine her occupational goal prior to job search. K/S/A to support occupation as a Payroll Clerk, occupation not in demand for local labor market. Presented with basic chronological resume lacking skills, responsibilities and accomplishments. Verbally described skills and job duties well during initial assessment. Next Steps: Referred to Advanced Resume Writing Workshop on 7/8/09 2pm & Individual Career Counseling on 7/13/09 9am.

Comments:

With every record you should take a quick look at the comments entered for the customer. This is where important information may be listed that could impact our match and referral. For instance an ex-felon that cannot work with children, or the customer cannot work with money...

The ABCs of Matching



A Matching is an administrative process, not a service, **and will not create or extend an enrollment.**

The diagram illustrates the Matching process. On the left, a dark red arrow points right, labeled "Job Order". In the center, the word "Matching" is written in a large, bold, dark red font. To the right of "Matching", a dark red arrow points left, labeled "Customer". Further to the right is the OSOS logo, which consists of the letters "OSOS" in white inside an orange circle.

What is Matching? Not a Services, Won't extend enrollment.
First step in the process!

B

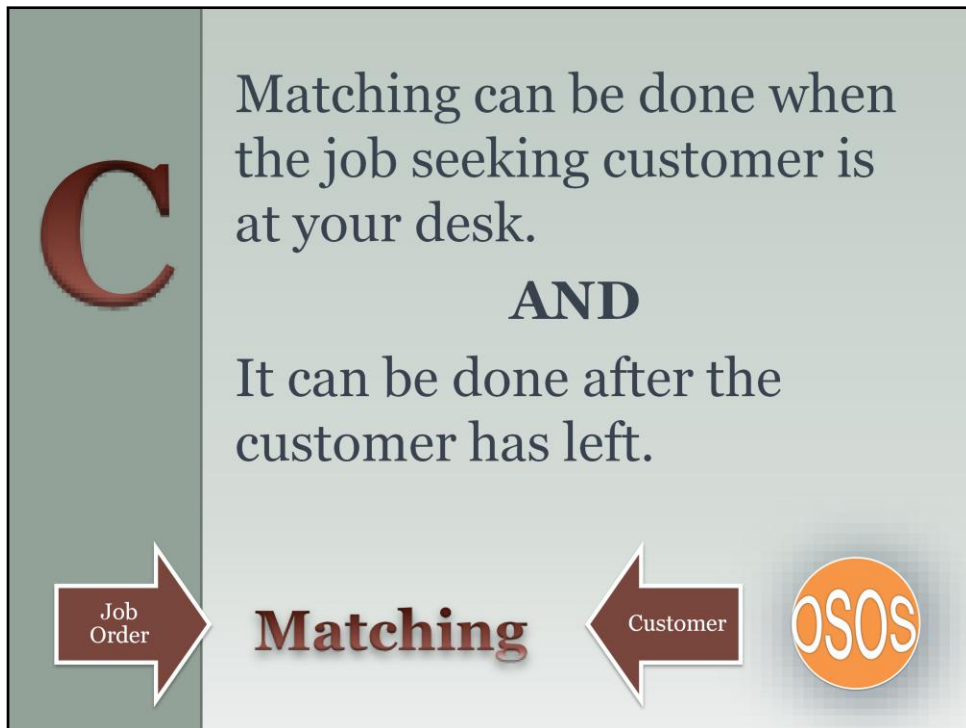
In Matching, specific information is compared between the customer and open job orders.



Matching



Matching is process whereby we compare the information on the customer's record with information on open job orders to see if we can find a good connection between the person's part experience and education with the business's needs / requirements.



When you have a customer at your desk, and you've completed the update of their record – you should be running a match to see if there are any current, open job orders in the system that are a good fit for the customer.

Even after the customer has left your desk, you should continue to match the customer to job orders. For example, you may do this a few days after your initial appointment to see if any new job orders were posted to the system that may be a good fit for the person.

REMEMBER TO SAVE ALL OF YOUR MATCHES!!

You can also match from the Job Order to the Customer but we will cover that later in the presentation.

Best Practices for Job Matching

- ✓ **Determine if your customer is qualified for the position.**
- ✓ **The key to a good customer match is an accurate, up to date OSOS customer record.**
- ✓ **Compare the job order with the customer detail information in OSOS.**



Best Practices for Matching

- an accurate and up to date OSOS customer record is key to a good job match.

Performing Matches from the Customer Module

Customer → Job Order

The screenshot shows the 'Customer Search' interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search (highlighted), Customer Detail, Comp Assess, and Services. A 'Quick Search' button is highlighted with a red box. The main form area contains two columns of input fields: 'Customer SSN' with fields SSN 1 through SSN 9, and 'Customer ID' with fields ID 1 through ID 9. To the right of these are fields for Last Name, First Name, Middle Initial, Birth Date, and Username. Below the form is a table with columns: OSOS ID, Vet, Status, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, LX. At the bottom, there is a toolbar with buttons: Options, Search (highlighted), Clear, Data, Print, Save, Print, Print to PDF, Print Match, Print, Print, Comments, Connect, and New.

Let's start matching a Customer to a Job Order:

- We will begin on the Customer Module, Customer Search, Quick Search tab – so we can locate the individual's record on OSOS.

Best Practice:

- If you do not have the customer's NYOSOS ID # or SSN # -- Use the customer's last and first name. If too many results come up (common with some names, like Smith) add the customer's zip code (found under the Geographic tab).
- If you use the customer's OSOS ID # or SSN # you CANNOT use any other search criteria with it.
- Hit the "Search" button.

Review the customer's information

The screenshot displays a web-based customer information system. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, there are sub-tabs: Customer Search, Customer Detail (selected), Comp Assess, and Services. The main header shows the customer's name, Malinak, Buster, and their OSOS ID: NY000315627. The 'Gen. Info' tab is active, showing various fields for personal and contact information. A red box highlights the 'Status' and 'Job Seeker' dropdown menus, both set to 'Active'. Other sections include Ethnic Heritage, Race, Education & Employment, and Contact Preferences.

- We have found our customer – Buster Malinak.
 - The first thing we want to check is that the customer has an “Active” OSOS Status and an Active Job Seeker Status.
- WHY??** Because this ensures that the person is currently actively engaged in the job seeking process. Do not want to target someone that is not looking for employment.

**Pay special attention
to:**

- ✓ **Education**
- ✓ **Objective**
- ✓ **Work**
- ✓ **History/Experience**
- ✓ **Skills/Abilities**
- ✓ **Location of the job**
- ✓ **Comments**



Best Practice

When reviewing a customer record it's important to review these items to 1) ensure information is current and 2) to give you a preliminary idea of what types of jobs for which the customer may be eligible.

Comments Section is another important tab to review. There may be information there that doesn't fit into the fields on various tabs but it important in finding a quality match. For example, they may have transportation issues, or lifting restrictions, or are unable to work in certain locations.

Add'l Info Tab

The screenshot displays a software interface for customer information. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail (selected), Comp Assess, and Services. The main header shows the customer name 'Malinak, Buster', SSN, and OSOS ID: NY000315627. A secondary navigation bar includes: Gen. Info, Add'l Info (selected), Objective, Work Hist., Ed/Lic, Skills, Saved Searches, Activities, Comments, Tests, and Initial Assessment. The main content area is divided into several sections: 'Programs' with a dropdown for 'Programs/Public Assistance Selection'; 'Income Status' with fields for Lower Living Standard, Income 70% LLSIL, and Local Priority; 'Military Service' with a checked 'Service Veteran' radio button; 'Employment Preferences' with dropdowns for Work Week, Duration, Salary, and Pay Unit, and a text field for Date Available; 'Shift Preference' with radio buttons for 'Work Any Shift' and 'No', and checkboxes for First Shift, Second Shift, Third Shift, Split Shift, and Rotating Shift; and 'Customer List Participation' with a 'List Name' dropdown and 'Assign To List' and 'Remove' buttons. A 'Selective Service' section with a 'Selective Service?' checkbox is also visible. At the bottom, a navigation bar contains buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Return to Srch, Comments, Tag, Resume, and Schedule.

- Moving across the various tabs – Additional Information

- Work Week (Any, Fulltime, Part time), Duration (Regular/Regular or Temporary/ Temporary) and Shift Preference (1st, 3rd) allow you to know person's preferences or limitations (can't do 3rd shift due to child care issues).
- This information will carry over to the job order search.

- Is your customer a Veteran? Mark it here so they can be flagged for any special programs or services.
- You should follow your office's Vet policy and refer them to your Vet staff.

Objective Tab

The screenshot displays the 'Objective Tab' interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, a header bar shows 'Customer Search' and 'Customer Detail' tabs. The main content area is divided into several sections:

- Employment Objective:** A text field containing 'Full time Electrician, Cashier or Electrician's Helper.'
- Desired O*Net:** A section with a table for listing titles and experience. The table has columns for 'O*Net Title' and 'Exp. (Months)'. A green dot is visible next to the section header. Below the table are checkboxes for 'Electricians', 'Cashiers', and 'Helpers--Electricians'. Buttons for 'Add a Job Title', 'Delete Selection', and 'Skills' are present.
- Acceptable Job Locations:** A section with dropdown menus for 'Maximum Zip Radius' (set to 25 miles) and 'of ZIP' (set to 12189). There are also options for 'Or Anywhere in the following states' and 'Or outside the United States'.

The bottom of the screen features a navigation bar with buttons for 'Save', 'Start Match', 'Services', 'Comp Assess', 'Activity', 'I.A. Referrals', 'Correspond', 'IVR', 'Return to Srch', 'Comments', 'Tag', 'Resume', and 'Schedule'.

- Next is the Objective tab – why type of work does this customer say they want to pursue.
- Focus on the red box area: This is where you will list desired titles (usually based on past work history) and an acceptable job location radius. Green dot indicated a required field so these must be populated.
- This information will be automatically brought into the job order search when you start the Match. Specifically the customer's O*Net Title and Maximum Zip Radius information (the distance the customer is willing to travel for a job).
- If a customer has more than one O*Net title listed – Match process will import the first one listed under the Desired O*Net section – in our example, Electrician. If you highlight another title before starting the match process (say the Cashier position), that job title would be carried over to the job order search.

Work History Tab

Customer Search: Malinak, Buster Customer Detail SSN: OSOS ID: NY000315627 2 of 2

Gen. Info Add'l Info Objective **Work Hist.** Edit Info Skills Saved Searches Activities Comments Tests Primary Language

Detail

Job Title: Electricians O*Net Titles O*Net Code: 47211100

Employer: Hawkins Electrical Repair Include online Start Date: 03/2009 End Date: 02/2010

Address: 278 Myrtle Ave Supervisor Phone Ext.

City: Albany Wage: \$ 12.00 Hourly Hours/week

State: New York Reason for Leaving: Lack of work

Country: United States Zip: 12240 Job Duties: Electrical wiring and set up of electrical power boxes.

Job Type: Full Time RR Event # Event

NAICS NAICS Lookup

Job	Company	City	Start	End
<input checked="" type="checkbox"/> Electricians	Hawkins Electrical Repair	Albany	03/2009	02/2010
<input type="checkbox"/> Helpers - Electricians	Ange Electricians	Albany	04/2008	01/2009

New Job Entry Delete Selection

Save Start Match Services Comp Assess Activity I.A. Referrals Correspond IVR Ret to Srch Comments Tag Resume Sched Message

- Next: Work History tab.

- The Work History tab contains the record of the customer’s previous employment. You can see that there are two past jobs listed at the bottom of the screen. The information at the top of the screen is related to the first job – electrician. If you want to see the “Detail” for the “Helpers – Electricians” than you need to select the small white box next to the job title.

- **Why is Work History important?** The job opening that you are looking to place your customer in should be realistic and related to the customer’s work objective and work history.

- We didn’t include slides here but you should continue across all the tabs – Education / Licenses, Skills and Comments – to see if there is other information that would be helpful in finding a quality match.

The Matching Process

The screenshot displays a web application interface for customer matching. The main header includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, there are sub-tabs for Customer Search, Customer Detail (selected), Comp Assess, and Services. The customer's name is Malinak, Buster, with SSN: OSOS ID: NY000315627 and page number 1 of 1. The interface is divided into several sections: Customer Data (SSN, Username, Last Name, Date of Birth, Gender, Address, City, State, Zip, Country, Metro, Phone, Email, URL, U.S. Citizen, Enrollments), Customer Assignment (Staff Assigned, WIB Assigned, Agency, Office, UI Claimant), and various status and preference sections (Ethnic Heritage, Race, Education & Employment, Contact Preferences). A red circle highlights the 'Start Match' button at the bottom left of the form.

- So you've completed your review of the customer's record and you are ready to start matching them to open job orders.
- Click on the **Start Match** button at the bottom of the screen to start the matching process.
- The **Start Match** button is active on all of the Customer Detail tabs we just went through so you can begin this process at any time. But again we strongly encourage you to review all of the customer's information to ensure it is current and you have a good picture of what type of jobs would be appropriate.

Match Mode Process

The screenshot displays two windows from a software application. The left window is titled 'CUSTOMER' and 'PROVIDER' and shows a 'Customer Detail' for 'Malinak, Buster'. It contains various fields for personal information, contact details, and assignments. The 'Start Match' button at the bottom is highlighted with a red box. The right window is titled 'EMPLOYER' and shows a 'Job Order Search' window. The 'Job Order Search' button is circled in red. A large blue arrow points from the 'Start Match' button in the left window to the 'Job Order Search' button in the right window, indicating the transition process.

Clicking on the **Start Match** button in the **Customer Detail Window** will start the matching process and open the **Job Order Search Window**.

- Clicking on the **Start Match** button will leave the Customer Module and move over to the Employer Module -Job Order Search Window.
- You can now begin to search for a job openings that match your customer's qualifications.

Job Order Search Match Mode Process

The screenshot displays the 'Job Order Search' interface. At the top, there are navigation tabs for 'CUSTOMER', 'PROVIDER', 'EMPLOYER' (which is selected and highlighted with a red box), 'STAFF', and 'HELP'. Below these are sub-tabs for 'Employer Search', 'Employer Detail', 'Job Order Search' (also highlighted with a red box), and 'Job Order Detail'. The main content area has a 'Quick Search' tab selected, with other tabs for 'General info', 'Job Detail', 'List Search', and 'Custom'. The 'Quick Search' section contains two vertical lists: 'Job Order #' with entries from JO 1 to JO 9, and 'Origination ID' with entries from ID 1 to ID 9. Below these lists is a table with columns: Company, Job Title, Order #, Listing Date, Status, Age, Origination, Orig ID, Ref. Rqs, and Ref. Mac. The table is currently empty. At the bottom, there is a search bar and a row of buttons: Options, Search, Clear, Detail, Print List, Comment, Save Search, Assign to List, Pool Match, and Refer.

- Here is a full view of the Employer Module – Job Order Search – Quick Search tab.
- Since you don't have specific job order numbers to begin with, this screen will be left blank.
- However, as you move through the other tabs, you will see that some information from the Customer's Record will auto populate here.

Job Order Search General Info Tab

The screenshot displays the 'Job Order Search' application interface, specifically the 'General Info' tab. The interface is organized into several sections:

- Navigation:** Top tabs include CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Employer Search, Employer Detail, Job Order Search (active), and Job Order Detail.
- Search Options:** A secondary set of tabs includes Quick Search, General Info (active), Job Detail, List Search, and Custom.
- Search Fields:** Includes Origination, Emp Job Title, Source (State), O*Net Title (47211100), Category (WIB), Order Status (Open), Emp Req #, Job Order Date (From/Thru), Source (Fed), Last Open Date (From/Thru), Staff Assigned, and Office.
- Employer Information:** Fields for Employer ID, Company Name, Ownership, and NAICS.
- Contact Information:** Fields for Contact Last Name, Suppressed, and checkboxes for Email, URL, Fax, Phone, Mail, and In Person.
- Job Location:** Fields for City, County, Zip (12189), and Radius (25 miles).

Red boxes highlight the O*Net Title field and the Job Location section, indicating that data from the Customer Detail Record has been automatically populated.

- As you can see, we've moved over to the "General Info" tab and the O*Net Title – Electrician – and Job Location (25 mile radius of the customer's home zip code – have been automatically filled in with data from the Customer Detail Record.
- Remember we talked about this back on Slide 13.

Job Order Search Job Detail Tab

The screenshot displays a web application interface for 'Job Order Search'. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail, Job Order Search (highlighted), and Job Order Detail. The main content area has sub-tabs: Quick Search, General Info, Job Detail (highlighted), List Search, and Custom. The 'Job Detail' tab contains several sections: 'Starting Pay' with input fields for Minimum, Maximum, and Unit; 'Benefits' with a list of checkboxes for Health Insurance, Dental Insurance, Vacation, Sick Leave, Holidays, Retirement/Pension Plan, Clothing/Uniform Allowance, and Child Care; 'Hours Per Week' with a dropdown menu; 'Education Required' with a dropdown menu showing 'Less Than or Equal' and 'High School Diploma' (highlighted with a red box); 'Experience Required' with input fields for Years and Months; and 'Public Transportation' with a dropdown menu.

- We continue to move across the tabs to the “Job Detail” tab.
- Education Required will fill in automatically from the Customer Detail Record.

Customer/Job Matching

Customer/Job Matching

CUSTOMER PROVIDER EMPLOYER STAFF HELP

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

Quick Search **General Info** Job Detail List Search Custom

Origination Order Status: Open

Emp Job Title Emp Req # Job Order Date From Thru

Source (State) Source (Fed) Last Open Date From Thru

O*Net Title: 47211100 Electricians O*Net Titles

Category Staff Assigned Change

WIB Office

Employer Information

Employer ID

Company Name

Ownership

NAICS

Contact Information

Contact Last Name

Suppressed

Email URL Fax

Phone Mail In Person

Job Location

City

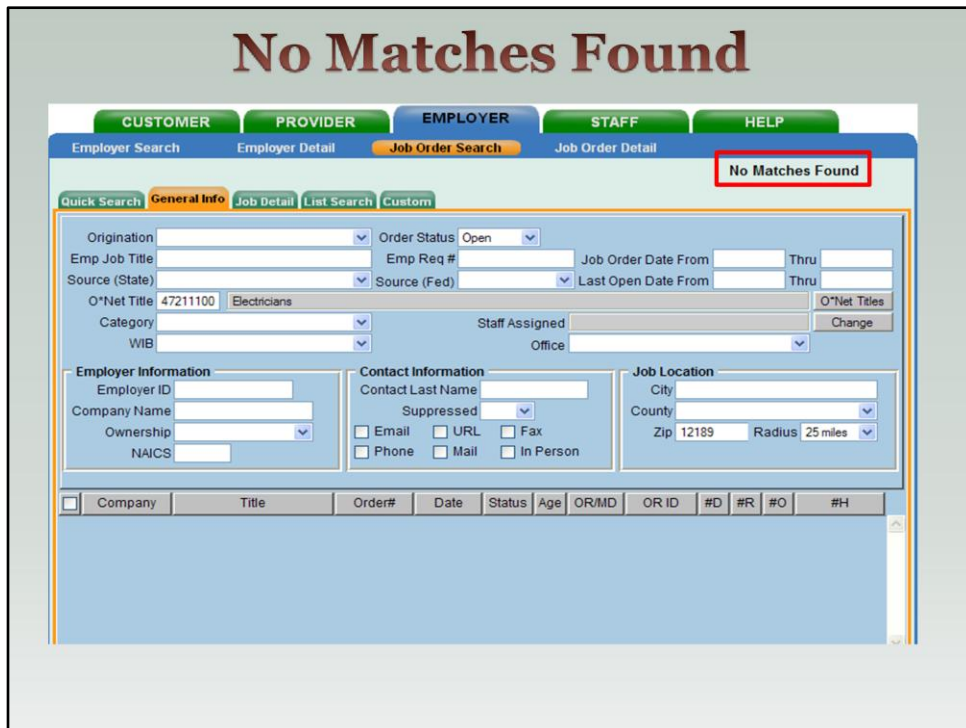
County

Zip: 12189 Radius: 25 miles

<input type="checkbox"/>	Company	Title	Order#	Date	Status	Age	OR/MD	OR ID	#D	#R	#O	#H
<input type="checkbox"/>												

Options Search Clear Detail Print List Comments Save Search Willing to List Stop Match Refer

- After reviewing the General Info and Job Detail tabs to ensure the customer's information moved over correctly, you can begin to look for jobs that match your customer's profile by clicking on the **Search** button in the lower menu bar.



- In this example, we have returned No Matches. If this occurs, you need to go back to the General Info tab and change/remove data in some of their fields. For example, you may need to broaden O*Net Title and/or increase the radius of the job location; and try your search again.
- If no results are returned and the customer hasn't specified that they are only looking for one career field you can try searching for another job title (O*Net Title), listed on the Objective tab of their Customer Detail Record. In this example, if no job matches were found using the customer's primary O*Net title of Electrician you could try to find a job match for the customer using Cashier or Helpers-Electrician. (Slide 13)
- If you continue to return no matches, and the experience field is populated (Slide 13), change the experience field to 0 and/or leave blank. **WHY?** If the person has 3 years of experience but a job states 4 is needed, this person will not come up in your match.

Successful Job Order Search

The screenshot shows a web application interface for a job order search. The main navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, there are sub-tabs for Employer Search, Employer Detail, Job Order Search (which is active), and Job Order Detail. The page number is 1 - 6 of 6.

The search criteria are displayed in a form with the following fields:

- Origination: [Dropdown]
- Order Status: Open [Dropdown]
- Emp Job Title: [Text]
- Emp Req #: [Text]
- Job Order Date From: [Text] Thru: [Text]
- Source (State): [Dropdown]
- Source (Fed): [Dropdown]
- Last Open Date From: [Text] Thru: [Text]
- O*Net Title: 47211100 Electricians [Text]
- Category: [Dropdown]
- Staff Assigned: [Text]
- WIB: [Dropdown]
- Office: [Dropdown]

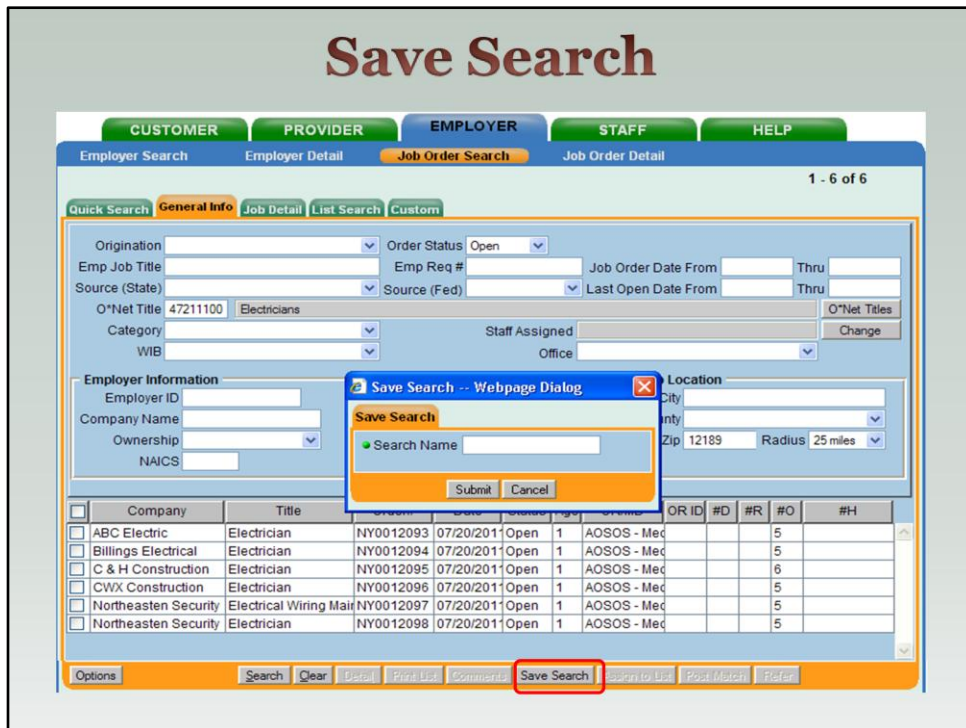
Additional sections include:

- Employer Information:** Employer ID, Company Name, Ownership, NAICS.
- Contact Information:** Contact Last Name, Suppressed, Email, URL, Fax, Phone, Mail, In Person.
- Job Location:** City, County, Zip (12189), Radius (25 miles).

The results table at the bottom displays 6 job orders for Electricians:

<input type="checkbox"/>	Company	Title	Order#	Date	Status	Ag	OR/MD	OR ID	#D	#R	#O	#H
<input type="checkbox"/>	ABC Electric	Electrician	NY0012093	07/20/2011	Open	0	AOSOS - M				5	
<input type="checkbox"/>	Billings Electrical	Electrician	NY0012094	07/20/2011	Open	0	AOSOS - M				5	
<input type="checkbox"/>	C & H Construction	Electrician	NY0012095	07/20/2011	Open	0	AOSOS - M				6	
<input type="checkbox"/>	CWX Construction	Electrician	NY0012096	07/20/2011	Open	0	AOSOS - M				5	
<input type="checkbox"/>	Northeasten Security	Electrical Wiring Ma	NY0012097	07/20/2011	Open	0	AOSOS - M				5	
<input type="checkbox"/>	Northeasten Security	Electrician	NY0012098	07/20/2011	Open	0	AOSOS - M				5	

- This is an example of a successful search: You see at the bottom of the page there are 6 job orders for Electrician displayed.
- The key search parameters in this example were the search criteria of O*Net title (Electrician) & the customer's preference of finding a job within 25 miles of his zip code (12189) so we did not have to modify either of those fields.

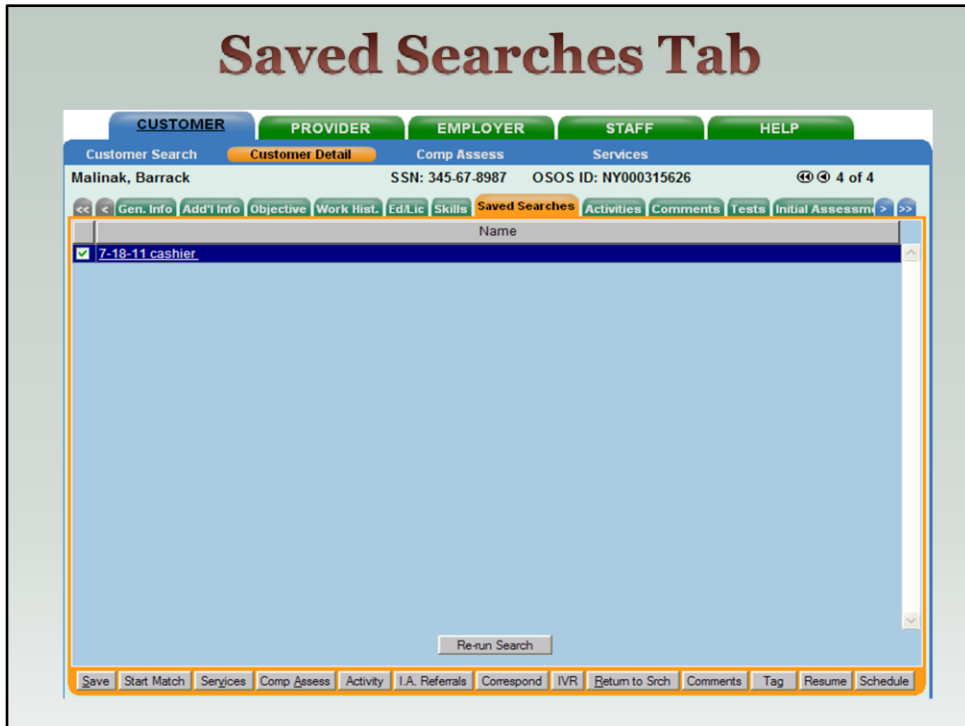


- At this point in the Match operation, if your Job Order Search returns any search results, the Save Search button will become active. This button allows you to save the search parameters used in this Match operation so that the search can be performed again later.

- The saved searches should be used only if you are going to re-run the search in a timely manner because the customer’s objective or job location information can change. Remember earlier we recommended you re-running the search a few days after you meet with the customer to see if any new job orders have come into the system.

- To save your search, click on the Save Search button, name your search in the Save Search Dialog Box & click Submit. All saved searches will be listed on the Saved Searches tab of the customer’s record in the Customer Detail Window for later use.

Saved Searches Tab



▪ Here we are showing you the Saved Searches tab of the customer's record in the Customer Detail Window.

▪ Best Practice: When you name the search - use the date that you saved the search parameters so that if you use the same job order search at a later date you can tell when it was last used.

Reviewing the Job Orders

The screenshot shows a web application interface for reviewing job orders. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail, Job Order Search (selected), and Job Order Detail. The page number '1 - 6 of 6' is displayed in the top right corner.

The main content area is divided into several sections:

- Quick Search:** Includes tabs for General Info, Job Detail, List Search, and Custom.
- Search Filters:** A form with various input fields and dropdown menus for filtering job orders. Fields include Origination, Emp Job Title, Source (State), O*Net Title (47211100), Category, WIB, Order Status (Open), Emp Req #, Job Order Date From/Thru, Source (Fed), Last Open Date From/Thru, Staff Assigned, and Office.
- Employer Information:** Fields for Employer ID, Company Name, Ownership, and NAICS.
- Contact Information:** Fields for Contact Last Name, Suppressed, and checkboxes for Email, URL, Fax, Phone, Mail, and In Person.
- Job Location:** Fields for City, County, Zip (12189), and Radius (25 miles).
- Table of Job Orders:** A table with columns for Company, Title, Order#, Date, Status, Ag, OR/MD, OR ID, #D, #R, #O, and #H. The table contains six rows of data, each with a checkbox in the first column.

<input type="checkbox"/>	Company	Title	Order#	Date	Status	Ag	OR/MD	OR ID	#D	#R	#O	#H
<input type="checkbox"/>	ABC Electric	Electrician	NY0012093	07/20/2011	Open	0	AOSOS - M				5	
<input type="checkbox"/>	Billings Electrical	Electrician	NY0012094	07/20/2011	Open	0	AOSOS - M				5	
<input type="checkbox"/>	C & H Construction	Electrician	NY0012095	07/20/2011	Open	0	AOSOS - M				6	
<input type="checkbox"/>	CWX Construction	Electrician	NY0012096	07/20/2011	Open	0	AOSOS - M				5	
<input type="checkbox"/>	Northeasten Security	Electrical Wiring Ma	NY0012097	07/20/2011	Open	0	AOSOS - M				5	
<input type="checkbox"/>	Northeasten Security	Electrician	NY0012098	07/20/2011	Open	0	AOSOS - M				5	

- Once you've saved the search criteria for a later search (if needed) you need to review the job orders that you found to see which ones are the best fit for the customer.
- Highlight the job orders that you would like to review by clicking on the check box next to the employer's name.
- If you want to highlight all the orders, select the white box in the header line next to Company Name.

Reviewing the Job Orders

The screenshot shows a web application interface for reviewing job orders. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail, Job Order Search (highlighted), and Job Order Detail. The page number "1 - 6 of 6" is displayed in the top right corner.

The main search area includes a "Quick Search" section with tabs for General Info, Job Detail, List Search, and Custom. The "General Info" tab is active, showing various search criteria:

- Origination: [Dropdown]
- Order Status: Open [Dropdown]
- Emp Job Title: [Text]
- Emp Req #: [Text]
- Job Order Date From: [Text] Thru: [Text]
- Source (State): [Dropdown]
- Source (Fed): [Dropdown]
- Last Open Date From: [Text] Thru: [Text]
- O*Net Title: 47211100 Electricians [Text]
- Category: [Dropdown]
- Staff Assigned: [Text]
- O*Net Titles: [Text]
- WIB: [Dropdown]
- Office: [Dropdown]
- Change: [Button]

Below the search criteria are three sections: Employer Information, Contact Information, and Job Location.

- Employer Information:** Employer ID, Company Name, Ownership, NAICS.
- Contact Information:** Contact Last Name, Suppressed [Dropdown], Email, URL, Fax, Phone, Mail, In Person.
- Job Location:** City, County, Zip 12189, Radius 25 miles.

A table of job orders is displayed below the search criteria. The table has columns: Company, Title, Order#, Date, Status, Ag, OR/MD, OR ID, #D, #R, #O, #H. The table contains 6 rows of data, all with "Open" status.

Company	Title	Order#	Date	Status	Ag	OR/MD	OR ID	#D	#R	#O	#H
ABC Electric	Electrician	NY0012093	07/20/2011	Open	0	AOSOS - M				5	
Billings Electrical	Electrician	NY0012094	07/20/2011	Open	0	AOSOS - M				5	
C & H Construction	Electrician	NY0012095	07/20/2011	Open	0	AOSOS - M				6	
CWX Construction	Electrician	NY0012096	07/20/2011	Open	0	AOSOS - M				5	
Northeasten Security	Electrical Wiring	NY0012097	07/20/2011	Open	0	AOSOS - M				5	
Northeasten Security	Electrician	NY0012098	07/20/2011	Open	0	AOSOS - M				5	

At the bottom of the interface, there are several buttons: Options, Search, Clear, Detail (highlighted with a red circle), Print List, Comments, Save Search, Assign to List, Post Match, and Refer.

- Highlighting the job orders will activate the Detail button.
- Click on the Detail button to activate the Job Order Detail Window. The job orders will be placed in the Job Order Detail Window for review.

Reviewing the Job Orders

The screenshot shows a software interface for reviewing job orders. At the top, there are navigation buttons: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are search filters: Employer Search (ABC Electric), Employer Detail, Job Order Search (Order#: NY0012093), and Job Order Detail (ID: NY000010253). A '1 of 6' indicator is in the top right corner. The main content area has tabs: General Info, Contact Info, Job Detail, Job Description, and Comments. The 'General Info' tab is selected, showing fields for Employer Information (Company: ABC Electric, NAICS: 238210, Ownership: Private/Corporation, FEIN: 64-6522065, State EIN: 32165165-74), Order Date (07/20/2011), Status (Open), Last Open Date (09/18/2011), Category (Regular), O*Net Title (47211100), Emp. Job Title (Electrician), Source (Fed/State), Affirmative Action, Emp Req #, and Job Location (Address, City: Albany, State: New York, Country: United States, Zip: 12240). At the bottom, there are buttons: Save, Duplicate, Emp New Job, Correspond, Print, Emp Detail, Return to Search, Start Match, Comments, and Tag.

- As you scroll through the job order records you can tag the job orders that are the best fit for your customer. Review the information on the first 5 tabs.
- You can navigate between the Job Order Detail Window and the Customer Detail Window in the Match Mode process to review both the job order and the customer qualifications.
- If you decide to match a job order after reviewing it in the Job Order Detail Window you click the Tag button at the bottom of the Window. This will make it easier for you to keep track of multiple job orders.
- The Tag button label will change to UnTag. To deselect the job order, click the UnTag button.
- Click the Return to Search button after you are finished reviewing the job orders.

Reviewing the Job Orders

CUSTOMER
PROVIDER
EMPLOYER
STAFF
HELP

Employer Search Employer Detail Job Order Search Job Order Detail

ABC Electric Order#: NY0012093 ID: NY000010253 1 of 6

General Info
Contact Info
Job Detail
Job Description
Comments
Matches
Referrals
Saved Searches
Audit

Referrals Requested Referrals Made

Openings Hires

Duration: ● Full Time, Regular Hours Per Week:

Work Days

Monday-Friday Varies

Mon Tue Wed Thu Fri Sat Sun

Shift:

Education Required:

Experience Required: Years Months

Keyboarding Speed:

Public Transportation:

Required License, Certificate or Registration:

Required Degree or Formal Training:

Starting Pay

Minimum: \$

Maximum: \$

Unit:

Drivers License

Class:

Endorsements

Tank Vehicle

Doubles/Triples

Pass Transport

Hazardous Materials

School Bus

Motorcycle

Air Brakes

Tank Veh & Haz Mat

Benefits

Yes Health Insurance

Yes Dental Insurance

Yes Vacation

Yes Sick Leave

Yes Holidays

Yes Retirement/Pension Plan

Yes Clothing Allowance

Yes Child Care

Lists

Name	Office	Staff	StateW

Save
Duplicate
Emp New Job
Correspond
Print
Emp Detail
Return to Search
Start Match
Comments
Tag

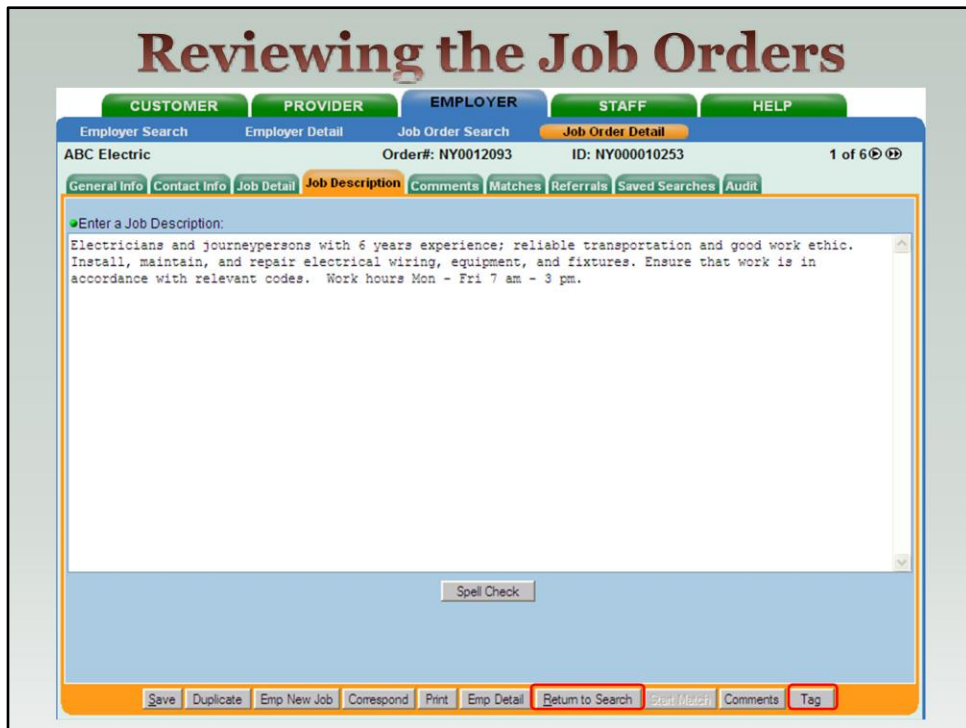
- As you scroll through the job order records you can tag the job orders that are the best fit for your customer. Review the information on the first 5 tabs.

- You can navigate between the Job Order Detail Window and the Customer Detail Window in the Match Mode process to review both the job order and the customer qualifications.

- If you decide to match a job order after reviewing it in the Job Order Detail Window you click the Tag button at the bottom of the Window. This will make it easier for you to keep track of multiple job orders.

- The Tag button label will change to UnTag. To deselect the job order, click the UnTag button.

- Click the Return to Search button after you are finished reviewing the job orders.



- As you scroll through the job order records you can tag the job orders that are the best fit for your customer. Review the information on the first 5 tabs.
- You can navigate between the Job Order Detail Window and the Customer Detail Window in the Match Mode process to review both the job order and the customer qualifications.
- If you decide to match a job order after reviewing it in the Job Order Detail Window you click the Tag button at the bottom of the Window. This will make it easier for you to keep track of multiple job orders.
- The Tag button label will change to UnTag. To deselect the job order, click the UnTag button.
- Click the Return to Search button after you are finished reviewing the job orders.

Reviewing the Job Orders

The screenshot shows a web application interface for reviewing job orders. The main navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, there are sub-tabs for Employer Search, Employer Detail, Job Order Search (which is active), and Job Order Detail. The page number '1 - 6 of 6' is displayed in the top right corner.

The search form is divided into several sections:

- Quick Search:** Includes tabs for General Info, Job Detail, List Search, and Custom.
- Search Filters:**
 - Origination: [Dropdown]
 - Order Status: Open [Dropdown]
 - Emp Job Title: [Text]
 - Emp Req #: [Text]
 - Job Order Date From: [Text] Thru: [Text]
 - Source (State): [Dropdown]
 - Source (Fed): [Dropdown]
 - Last Open Date From: [Text] Thru: [Text]
 - O*Net Title: 47211100 Electricians [Text]
 - Category: [Dropdown]
 - Staff Assigned: [Text]
 - WIB: [Dropdown]
 - Office: [Dropdown]
 - O*Net Titles: [Text]
 - Change: [Button]
- Employer Information:**
 - Employer ID: [Text]
 - Company Name: [Text]
 - Ownership: [Dropdown]
 - NAICS: [Text]
- Contact Information:**
 - Contact Last Name: [Text]
 - Suppressed: [Dropdown]
 - Email URL Fax
 - Phone Mail In Person
- Job Location:**
 - City: [Text]
 - County: [Dropdown]
 - Zip: 12189 [Text] Radius: 25 miles [Dropdown]

Below the search form is a table of search results:

<input type="checkbox"/>	Company	Title	Order#	Date	Status	Age	OR/MD	OR ID	#D	#R	#O	#H
<input checked="" type="checkbox"/>	ABC Electric	Electrician	NY0012093	07/20/2011	Open	1	AOSOS - Mec				5	
<input type="checkbox"/>	Billings Electrical	Electrician	NY0012094	07/20/2011	Open	1	AOSOS - Mec				5	
<input checked="" type="checkbox"/>	C & H Construction	Electrician	NY0012095	07/20/2011	Open	1	AOSOS - Mec				6	
<input type="checkbox"/>	CWX Construction	Electrician	NY0012096	07/20/2011	Open	1	AOSOS - Mec				5	
<input type="checkbox"/>	Northeasten Security	Electrical Wiring Maint	NY0012097	07/20/2011	Open	1	AOSOS - Mec				5	
<input checked="" type="checkbox"/>	Northeasten Security	Electrician	NY0012098	07/20/2011	Open	1	AOSOS - Mec				5	

- Clicking on the Return to Search button will return you to the Job Order Search Window. You will still be in Match mode. If you tagged any job orders in their Job Order Detail Windows, their search result list entries will be highlighted like in the example above.

- Make sure the jobs orders that you have matched to your customer are highlighted. If you didn't "tag" the job orders as you scroll through to review them the job orders in the search results listing will not be highlighted. You will need to highlight the job orders that you find are good job matches before posting a match.

Posting a Match

The screenshot shows a software interface for posting a match. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Employer Search, Employer Detail, Job Order Search (selected), and Job Order Detail. The page number '1 - 6 of 6' is in the top right. A 'Quick Search' section includes fields for Origination, Emp Job Title, Source (State), O*Net Title (47211100), Category, WIB, Order Status (Open), Emp Req #, Source (Fed), Job Order Date From/Thru, Last Open Date From/Thru, Staff Assigned, Office, O*Net Titles, and a Change button. Below this are sections for Employer Information (Employer ID, Company Name, Ownership, NAICS), Contact Information (Contact Last Name, Suppressed, Email, URL, Fax, Phone, Mail, In Person), and Job Location (City, County, Zip 12189, Radius 25 miles). A table of job orders is shown below, with the 'Post Match' button highlighted by a red arrow.

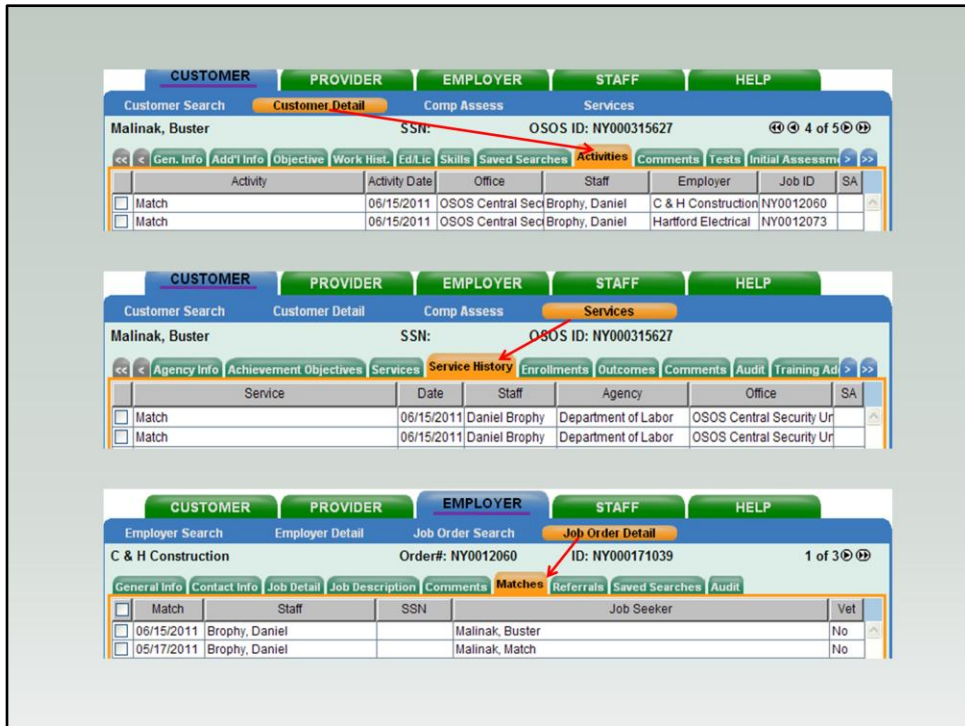
<input type="checkbox"/>	Company	Title	Order#	Date	Status	Age	OR/MD	OR ID	#D	#R	#O	#H
<input checked="" type="checkbox"/>	ABC Electric	Electrician	NY0012093	07/20/2011	Open	1	AOSOS - Mec				5	
<input type="checkbox"/>	Billings Electrical	Electrician	NY0012094	07/20/2011	Open	1	AOSOS - Mec				5	
<input checked="" type="checkbox"/>	C & H Construction	Electrician	NY0012095	07/20/2011	Open	1	AOSOS - Mec				6	
<input type="checkbox"/>	CWX Construction	Electrician	NY0012096	07/20/2011	Open	1	AOSOS - Mec				5	
<input type="checkbox"/>	Northeasten Security	Electrical Wiring Ma	NY0012097	07/20/2011	Open	1	AOSOS - Mec				5	
<input checked="" type="checkbox"/>	Northeasten Security	Electrician	NY0012098	07/20/2011	Open	1	AOSOS - Mec				5	

Options Search Clear Detail Print List Save Srch Assign to List **Post Match** Refer Activity Comments Correspond IVZ New

Post Match ↑

▪ In the Job Order Search Window the list entries that you tagged will be highlighted. Click the **Post Match** button. A “Job Matched” message will appear briefly in the upper right corner of the window.

▪ Write down the Job Order # of each matched job. You will need to locate the job order to print the job order summary information to send to the customer.



- A successful Match (after you click on the Post Match button), will be posted in the Customer's record on the Customer Detail Window under the *Activities* tab and on the Services Window under the *Service History* tab.
- It will also be recorded in the Employer – Job Order Detail Window under the *Matches* tab.
- If you have a customer sitting at your desk, and they state that they are interested in applying for the position, you would then record the match as a referral. We will explain this process later in this presentation.

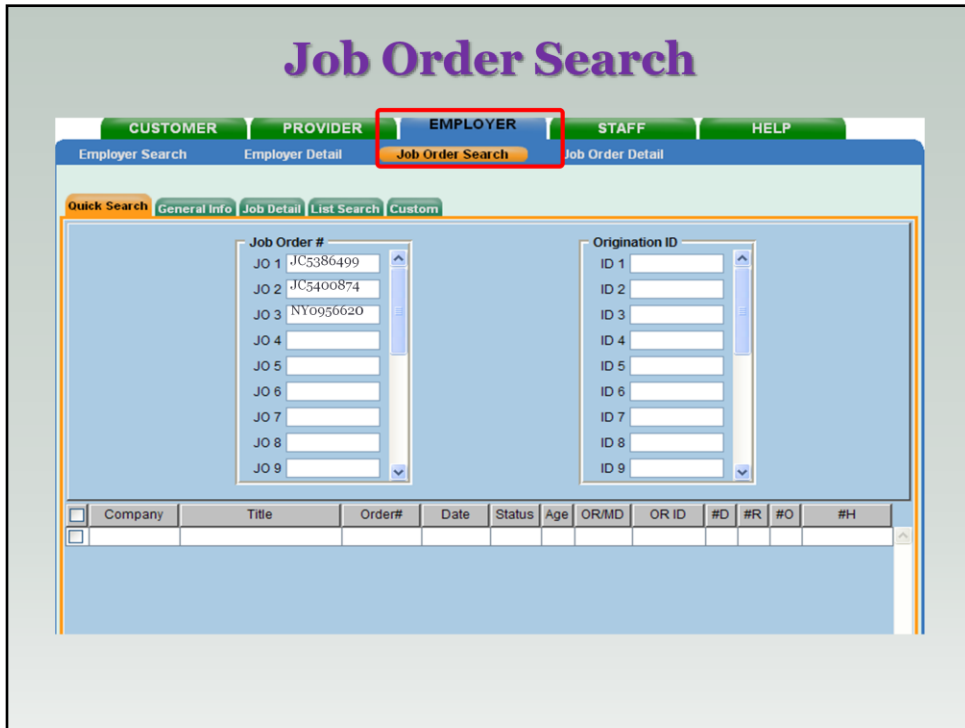
Performing Matches from the Employer Module Job Order → Customer

The screenshot displays the 'EMPLOYER' module interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search (selected), Employer Detail, Job Order Search, and Job Order Detail. The main content area has a 'Quick Search' section with tabs for General Info, Additional Info, List Search (selected), Reports, and Custom. The 'List Search' view shows a form with 'Employer ID' (ID 1 through ID 9) and 'Employer Name' fields. Below the form is a table with columns: Company, Staff, Office, SEIN, City, Created, and Age. At the bottom, there are buttons: Options, Search, Clear, Detail, Print List, Comments, Correspond, Assign to List, Show Contacts, and New.

We've just covered how to match a customer record to a job order. Now we are going to cover how to match a job order to a customer(s).

ALL CC STAFF PERMISSIONS ALLOW FOR MATCHING FROM BOTH THE CUSTOMER RECORD AND THE JOB ORDER.

Job Order matching starts at the Employer Module & comparing **specific information** between open job orders and customers.



- Job Order Search Window.
- The most common method is to use the Job Order #. You can add multiple Job Order numbers on the Quick Search tab.
- Using the Job Order # search is a stand alone search, you don't need to add any more search criteria.

Job Order Search – General Info Tab

The screenshot displays the 'Job Order Search – General Info Tab' interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail, Job Order Search (selected), and Job Order Detail. The main search area is divided into several sections:

- Search Filters:** Includes fields for Origination, Emp Job Title, Source (State), O*Net Title, Category, and WIB. A dropdown menu for 'Order Status' is open, showing options: Open, Pending, Referred, Suspend, Archived, Closed, and Filled.
- Employer Information:** Fields for Employer ID, Company Name, Ownership, and NAICS.
- Contact Information:** Fields for Contact Last Name, Suppressed, and checkboxes for Email, URL, Fax, Phone, Mail, and In Person.
- Job Location:** Fields for City, County, Zip, and Radius.

Below the search filters is a table with the following columns: Company, Job Title, Order #, Listing Date, Status, Age, Origination, Orig ID, Ref. Rq, and Ref. Mad. The table is currently empty. At the bottom of the interface, there are buttons for Options, Search, Clear, Detail, Print List, Comments, Save Search, Assign to List, Post Match, and Refer.

- If you don't have a job order number to start with, you will need to do a General Search.
- Fields to complete include:
 - ✓ Order Status – Open
 - ✓ Employer Job Title , WIB, Job Location, Company Name (if known).
 - ✓ Zip and Radius fields are extremely helpful.
 - ✓ Job order date From/Thru can be helpful if you know the approximate date the order was posted.
- Click on the **Search** button to start your search.

Job Order Search Results

CUSTOMER
PROVIDER
EMPLOYER
STAFF
HELP

Employer Search
Employer Detail
Job Order Search
Job Order Detail

1 - 5 of 5

Quick Search
General Info
Job Detail
List Search
Custom

Origination

Emp Job Title

Source (State)

O*Net Title

Category

WIB

Order Status

Emp Req #

Source (Fed)

Staff Assigned

Office

Job Order Date From Thru

Last Open Date From Thru

O*Net Titles

Change

Employer Information

Employer ID

Company Name

Ownership

NAICS

Contact Information

Contact Last Name

Suppressed

Email URL Fax

Phone Mail In Person

Job Location

City

County

Zip Radius

<input type="checkbox"/>	Company	Title	Order#	Date	Status	Age	OR/MD	OR ID	#D	#R	#O	#H
<input type="checkbox"/>	Ace Hardware	Cashier	NY0012103	07/22/2011	Open	26	AOSOS-			0	5	
<input type="checkbox"/>	Blatt Electrical	Cashier	NY0013104	08/11/2011	Open	6	AOSOS-				5	
<input type="checkbox"/>	Kmart	Cashier	NY0013107	08/11/2011	Open	6	AOSOS-			1	6	
<input type="checkbox"/>	Tri-City AutoP	Cashier	NY0013105	08/11/2011	Open	6	AOSOS-				6	
<input type="checkbox"/>	Wendy's	Cashier	NY0013106	08/11/2011	Open	6	AOSOS-			2	6	

Options
Search
Clear
Detail
Print List
Comments
Save Search
Assign to List
Post Match
Refer

- Successful search results will be displayed on the Search Results Listing screen.

- In this example we have 5 job orders using the search criteria of Emp. Job Title/WIB & Order Status Open.

Note: WIB will only yield staff entered job orders; use Job Location to include all (job central/jobs express) and a Zip Code search yields more results than using County or City.

- Highlight the job orders you wish to review & this will activate the grey Detail button.

Reviewing the Job Orders

The screenshot shows a web application interface for reviewing job orders. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (highlighted with a red box), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail, Job Order Search, and Job Order Detail (highlighted with a red box). The main content area displays details for a job order from 'Ace Hardware' with Order# NY0012103 and ID: NY000171030. A '1 of 5' indicator with left and right arrows is in the top right. A 'General Info' tab is selected, showing fields for Company (Ace Hardware), NAICS (444130), Hardware Stores, Ownership, FEIN, State EIN, Order Date (07/22/2011), Status Date (07/22/2011), Status (Open), Last Open Date (09/20/2011, highlighted with a red box), Category (Regular), O*Net Title (41201100), Emp. Job Title (Cashier), Source (Fed/State), Affirmative Action, and Job Location (Address: 12 Campus Club Drive, City: Albany, State: New York, Country: United States, Zip: 12240). A grey arrow points to the '1 of 5' indicator.

- For multiple results you can toggle through the job orders using the arrows on the upper right.
- Review Job Orders – Job Detail, Contact Info, Job Description, Comments tab. We can only job match one job order at a time.
- Check last open date – how long is the job order open for? WHY DO WE DO THIS? If the order has been open for longer than 30 days, it is possible that the position has been filed and the business hasn't had the chance to close the order. If you want to move forward the match / referral, be aware that the position may no longer be open. You should verify the status of the order with the business services staff to see if they know if its open. Highly competitive environment. Business overwhelmed with applications. Orders close quickly. Need to move quickly on orders b/c order could be "stale" after 2-3 weeks.

Job Detail Tab

CUSTOMER
PROVIDER
EMPLOYER
STAFF
HELP

Employer Search
Employer Detail
Job Order Search
Job Order Detail

Ace Hardware Order#: NY0012103 ID: NY000171030 1 of 5

General Info
Job Detail
Job Description
Comments
Matches
Referrals
Saved Searches
Audit

Referrals Requested Referrals Made

Openings Hires

Duration: Hours Per Week:

Work Days

Monday-Friday Varies

Mon Tue Wed Thu Fri Sat Sun

Shift:

Education Required:

Experience Required: Years Months

Keyboarding Speed:

Public Transportation:

Required License, Certificate or Registration:

Required Degree or Formal Training:

Starting Pay

Minimum:

Maximum:

Unit:

Drivers License

Class:

Endorsements

Tank Vehicle

Doubles/Triples

Pass Transport

Hazardous Materials

School Bus

Motorcycle

Air Brakes

Tank Veh & Haz Mat

Benefits

Yes Health Insurance

Dental Insurance

Yes Vacation

Sick Leave

Holidays

Retirement/Pension Plan

Yes Clothing Allowance

Child Care

Lists

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

- Check # of Openings, Duration, Education etc. on the Job Detail tab.
- In this example the employer has specified that the company provides health insurance, vacation time, a clothing allowance & is on a public transportation line.
- WHY IS THIS INFO IMPORTANT? This information is the minimum requirements of the business and sending someone who doesn't meet these is not a quality match. Also check job description to see if there are other needed items – like a DL. Benefits are also a selling point to a job seeker that may not be sure if they are really interested in the position.

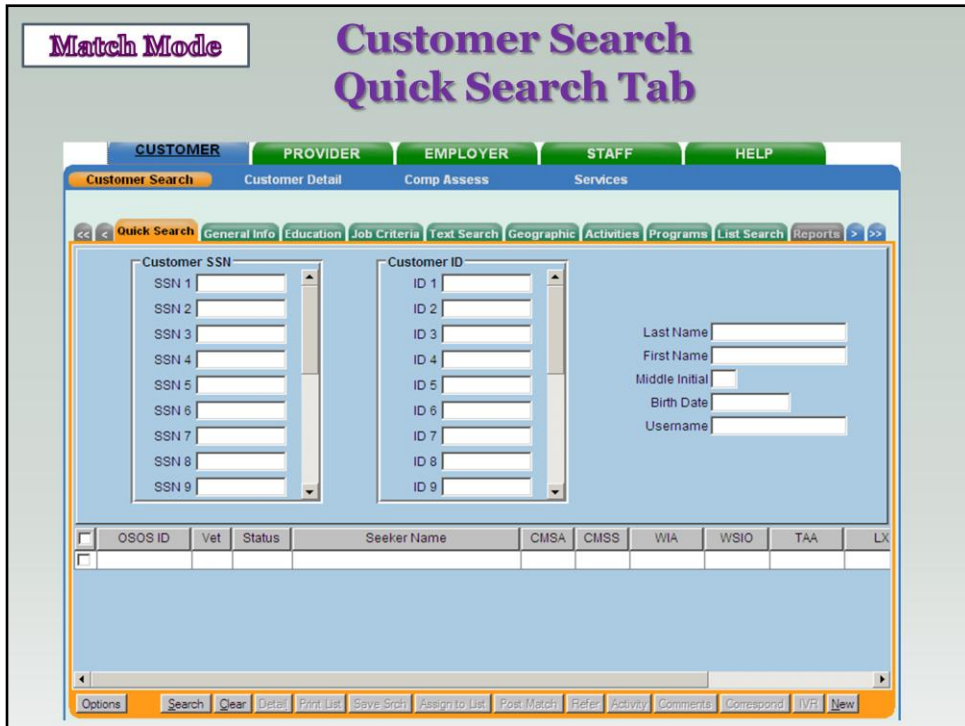


- The job description contains the specifics of the job that we can compare to our customer talent bank.
- REVIEW TO SEE IF THERE ARE ANY REQUIREMENTS LISTED HERE – EXAMPLE: DL OR EDUCATION – THAT ARE NOT ON THE JOB SETAIL TAB THAT ARE IMPORTANT TO MEET MIN QUAL FOR GOOD MATCH
- We are comparing the job order requirements to the customer’s skills and work history.
- Identify any skills keywords that you could use in your customer search.
- Check Comments Tab to see if there is any additional information that would be helpful in determining a quality match. Ex. May have a comment that they are interested in hiring veterans or ex-offenders.

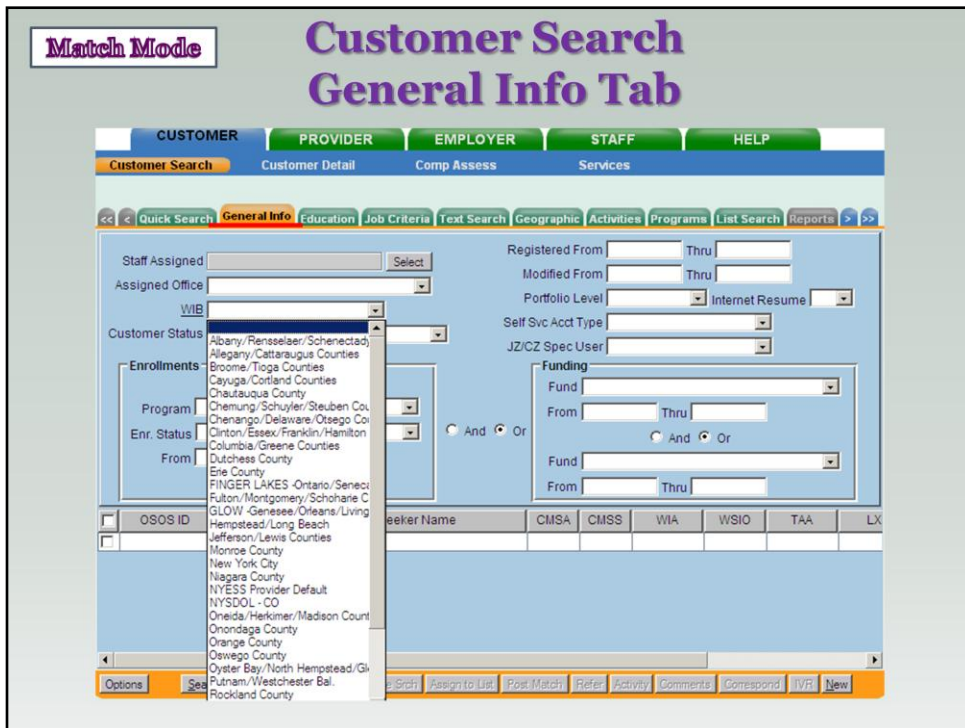


The Start Match button is available on all the Job Order Detail Window tabs.

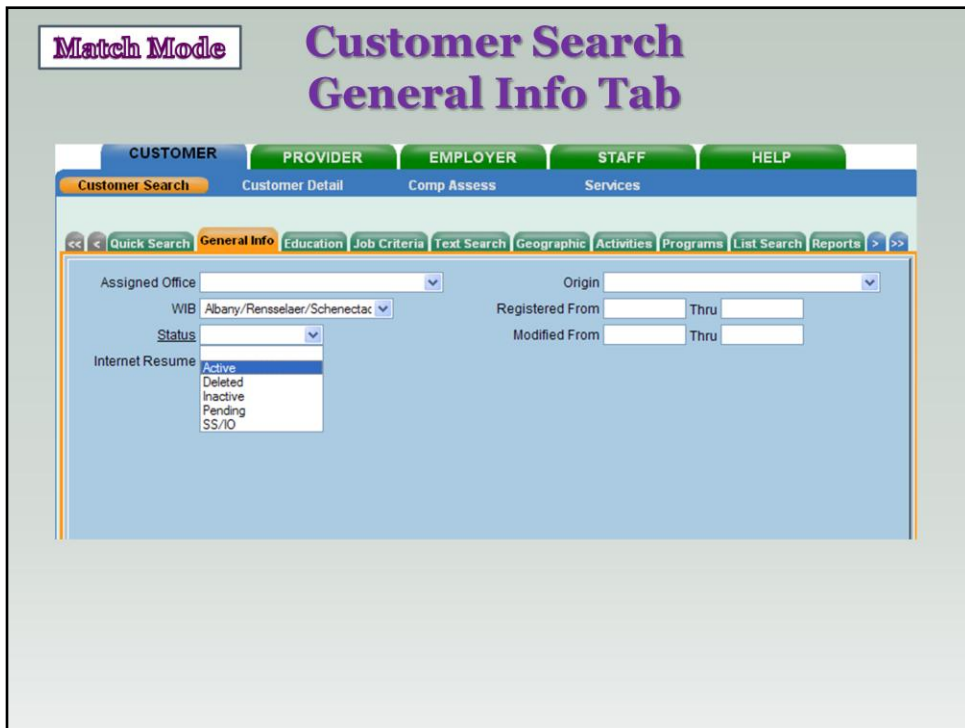
Click on the **Start Match** button to start the job matching process to search for customers whose skills & work history match the job order. This will bring up the Customer Search Window.



- We are now in the Match Mode or Matching process.
- Before we start our search we need to refine our search so that we can locate our local customers that fit the job order requirements.
- We're not going to add anything to the Quick Search Screen.



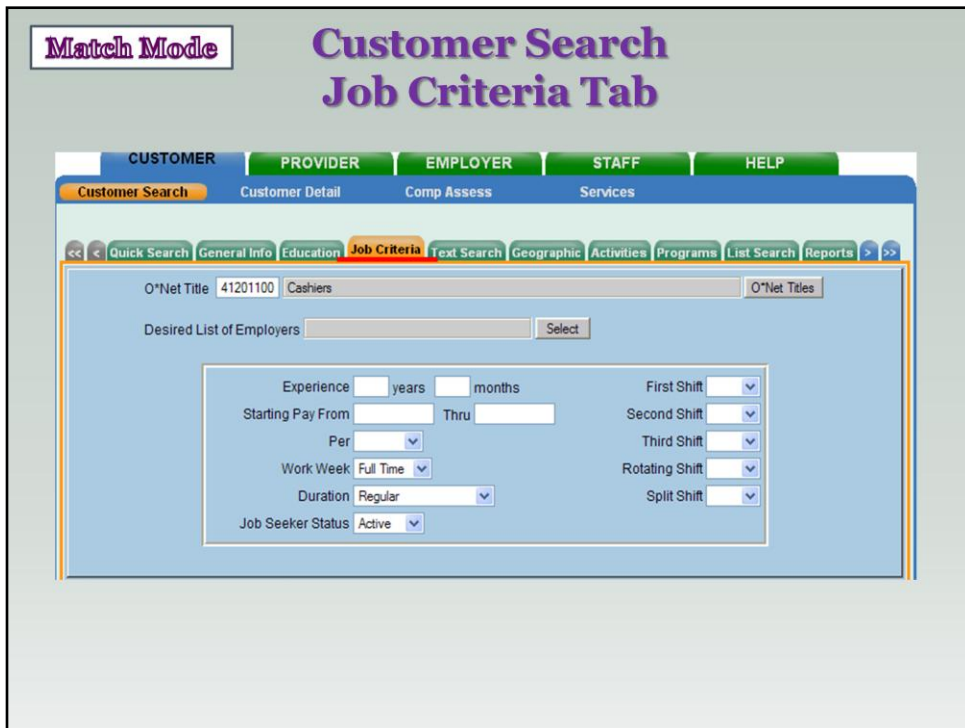
- **General Info tab.** Start search by selecting your local WIB. This grabs the largest population of local customers to start. Depending on the results, we may come back to this screen and modify the selection to a single office to reduce the number OR remove the selection entirely to pull from a larger radius.



- Still on General Info tab. Moving to the Status Button – selecting Active to ensure we'll pulling customers that are actively looking for work.



- Moving from General Info Tab to Education Tab
- Education Tab fills in automatically from the job order.



- Next move over to the Job Criteria Tab.
- O*Net, Work Week & Duration fill in automatically. Make Job Seeker field “Active”.
- If pay range was also listed on job order, that information will also populate here. If your search comes back with few to no matches, you may want to delete this information so it can draw from a larger group of job seekers.
- For example, if the order pays \$11 but a candidates made \$15 in the past, they will not come up in the match.
- This is also true for the Years of Experience. If the order states 5 yrs, it will draw someone with 6+ but don't pull someone with 4 yrs exp. This is a problem b/c business may consider someone will less experience especially if they are packaged with OJT.

- Text Search Tab used to narrow down results of search if population is too large or to search for special groups of candidates
- This screen is needed for the WFS = Work For Success and NYYW = New York Youth Works programs to identify the targeted populations for those specific programs.
- Could also be helpful with specific computer skills or to fine tune the positions – warehouse clerk vs. office clerk.
- CLEAN UP THE CUSTOMER RECORD – SKILLS TAB
- If you're getting manageable results than this may not be needed. But if your pull yields 100s it's another way to narrow down the pull.

- This tab helps you search for candidates that are under specific programs – like EUC – or who could fit programs - like OJT which targets LTU
- However, if you don't need to include those limitations, you should leave it blank to draw in more candidates.
- This will enable to you to also draw in candidates that may already be working but are the best fit for the business.
- Programs tab – make UI-Claimant Status “Seek” (Subject to Work Search).
- Click on the **Search** button to start your customer search to match our job order to a talent bank customer.
- The Search button is active on all of the Customer Search Window tabs.

Match Mode

Customer Search Results

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Customer Search Customer Detail Comp Assess Services

1 - 15 of 15

Quick Search General Info Education Job Criteria Text Search Geographic Activities Programs List Search Reports

Military Service

Veteran Status

Veteran Era

Recently Separated

Service Disability

Program Qualification

UI-Claimant Status

Lower Living Std

Migrant Status

Profiled?

Programs/Public Assistance

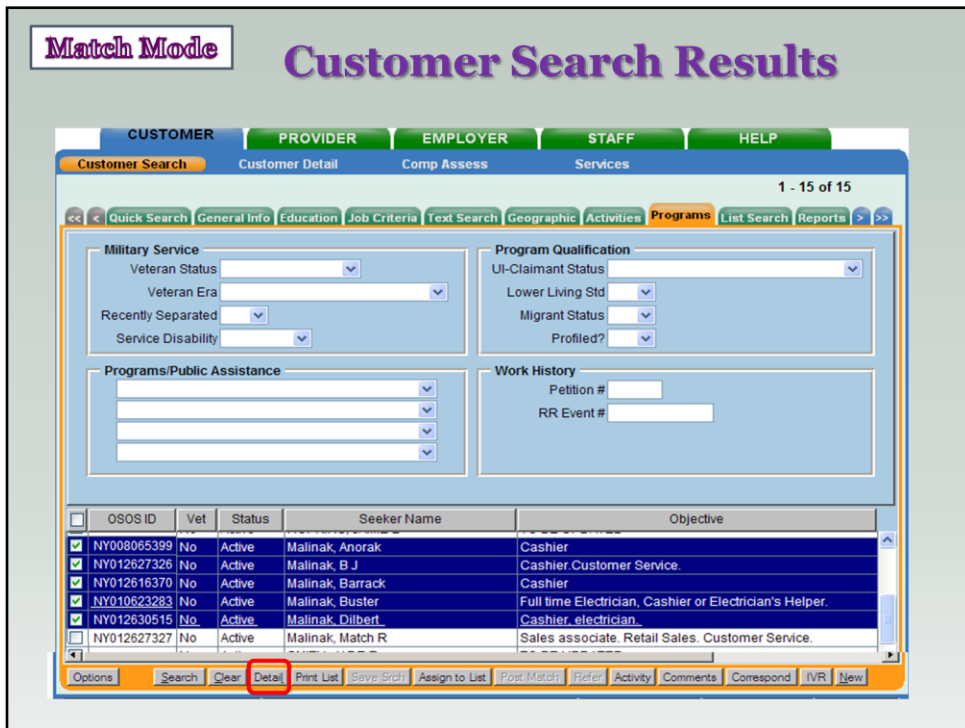
Work History

Petition #

RR Event #

<input type="checkbox"/>	OSOS ID	Vet	Status	Seeker Name	Objective
<input type="checkbox"/>	NY008065399	No	Active	Malinak, Anorak	Cashier
<input type="checkbox"/>	NY012627326	No	Active	Malinak, B J	Cashier.Customer Service.
<input type="checkbox"/>	NY012616370	No	Active	Malinak, Barrack	Cashier
<input type="checkbox"/>	NY010623283	No	Active	Malinak, Buster	Full time Electrician, Cashier or Electrician's Helper.
<input type="checkbox"/>	NY012630515	No	Active	Malinak, Dilbert	Cashier, electrician.
<input type="checkbox"/>	NY012627327	No	Active	Malinak, Match R	Sales associate. Retail Sales. Customer Service.

- This search returned 15 customer records.
- If you return no search results or limited research results you can take out some of the search criteria.
- The less search criteria you use the more results you will get back.



- Highlight the customer records that you would like to review by checking the white check box next to their names.
- You can highlight all the records by clicking on the check box on the grey header row next to OSOS ID.
- Click on the **Detail** button - this will place the highlighted customers in the Customer Detail Window.
- You can highlight all the records by clicking on the check box on the grey header row next to OSOS ID.
- Click on the **Detail** button - this will place the highlighted customers in the Customer Detail Window.

Match Mode

Reviewing Possible Matches

The screenshot displays a web application interface for reviewing customer matches. The main header includes navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, a sub-header shows 'Customer Search' and 'Customer Detail' (highlighted in red). The customer's name is 'Malinak, B J', with SSN: 123-87-3434 and OSOS ID: NY000315696. The interface is divided into several sections:

- Customer Data:** Includes fields for SSN (123-87-3434), Username (768TUYTU), Last Name (Malinak), Date of Birth (05/07/1975), Gender (Male), Address (8784 Malinak Way), City (Albany), State (New York), Zip (12240), Phone (755-757-4777), and Email (bjmalinak@msn.com).
- Customer Assignment:** Shows Staff Assigned (Brophy, Dan), WIB Assigned (Albany/Rensselaer/Schenectady Counties), Agency (Department of Labor), Office (ALBANY), and UI Claimant (Seek (Subject to Work Search)).
- Personal Information:** Includes Status (Active), Job Seeker (Active), Password (867UTRIK), First Name (B J), and MI (MI).
- Enrollment:** JZ/CZ Manager (unchecked).
- Education & Employment:** Education Level (12 Grade - HS Graduate), School Status (Not attending school; H.S. Graduate), and Employment Status (Not Employed).
- Contact Preferences:** Includes checkboxes for Use Postal, Pri. Phone, Alt. Phone, Fax, and Email, along with a 'Resume Contact Info' button.

At the bottom, there is a navigation bar with buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.

- We've selected 5 customer records to review. These customer's will be your possible matches.
- Review customer records – General Info, Add'l Info, Objective, Work History, Ed/Lic, Skills & Comments tabs.

Match Mode

Add'l Info Tab

CUSTOMER	PROVIDER	EMPLOYER	STAFF	HELP
----------	----------	----------	-------	------

Customer Search
Customer Detail
Comp Assess
Services

Malinak, B J
SSN: 123-87-3434
OSOS ID: NY000315696
2 of 5

Gen. Info
Add'l Info
Objective
Work Hist.
Edit Info
Skills
Saved Searches
Activities
Comments
Tests
Initial Assessm

Programs

Programs/Public Assistance Selection

Income Status

Lower Living Standard: N/A

Income 70% LLSIL: N/A

Local Priority: N/A

Disability Status: Not Disabled

Migrant / Seasonal Worker: Yes No

Military Service

Service Veteran

Customer List Participation

List Name

Assign To List Remove

Employment Preferences

Work Week:

Duration:

Salary:

Pay Unit:

Date Available:

Shift Preference

Work Any Shift: Yes No

First Shift

Second Shift

Third Shift

Split Shift

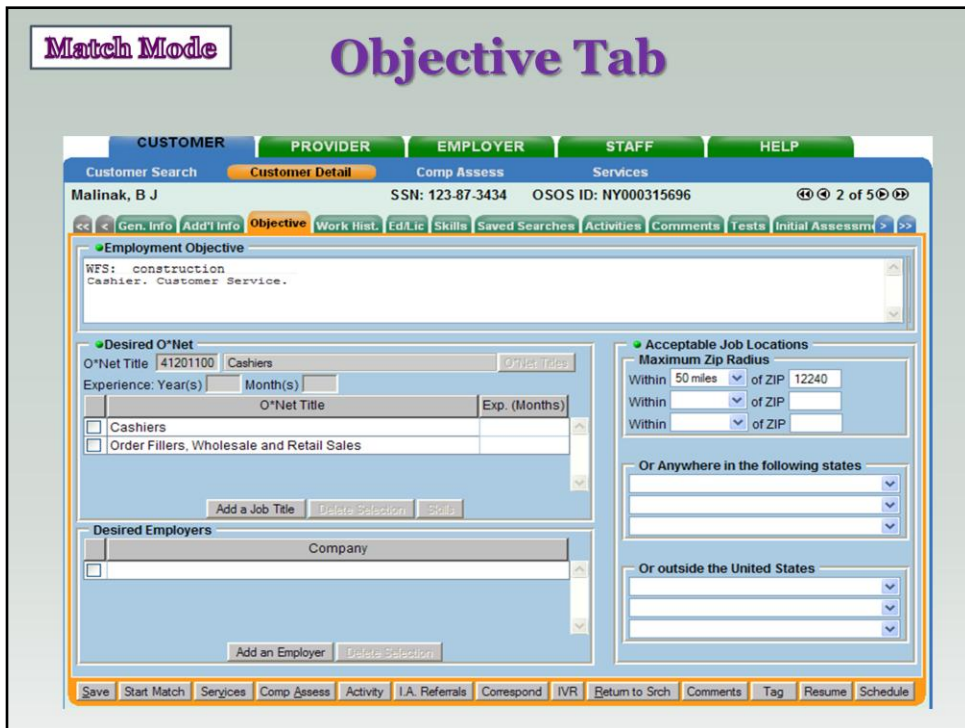
Rotating Shift

Selective Service

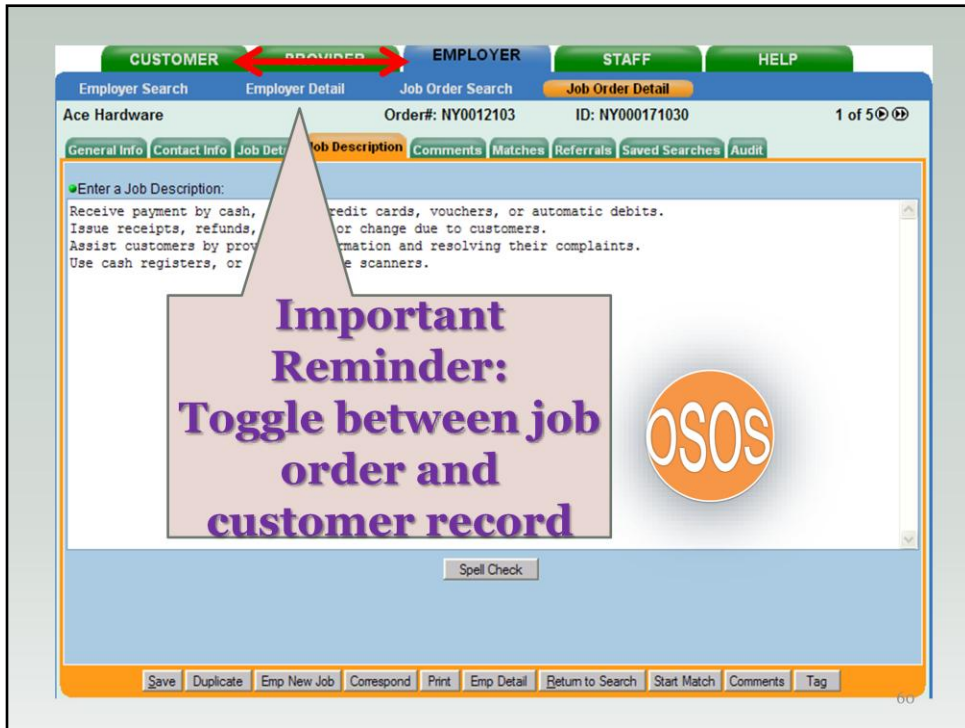
Selective Service?

Save
Start Match
Services
Comp Assess
Activity
I.A. Referrals
Correspond
IVR
Return to Srch
Comments
Tag
Resume
Schedule

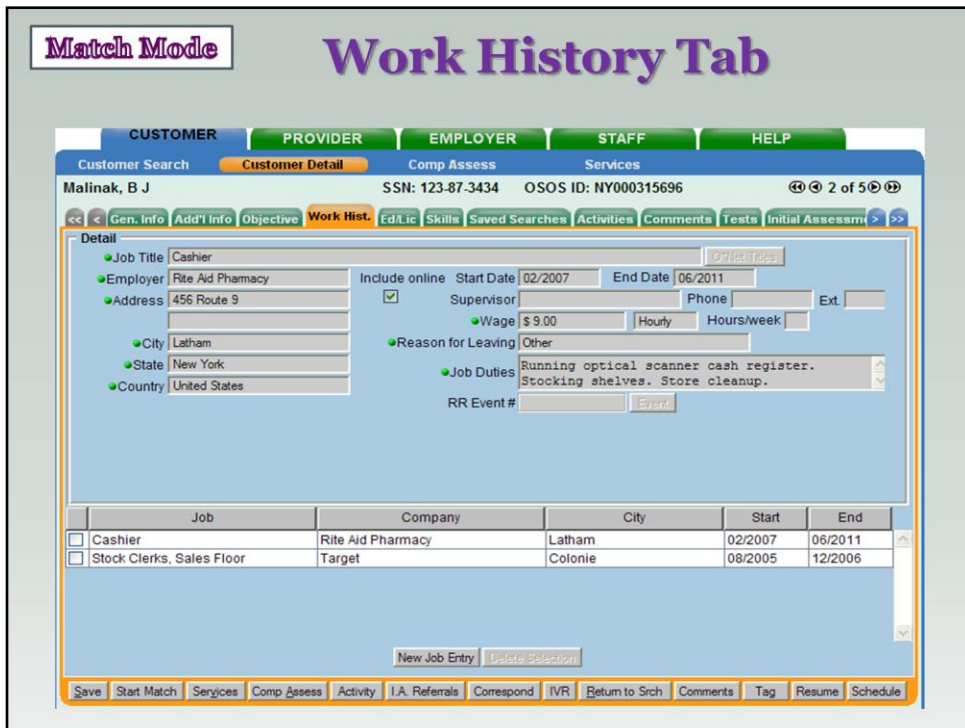
- Is the customer a Veteran? If yes, follow your office's policy for Veteran's.



- O*Net Title & Objective- we want to make sure that the customers experience/employment objective matches with the job order.
- Notice our example doesn't include # month experience next to O*Net titles. This information is pulled from the customer records so if it's blank, it's because it was never recorded. If this job order required 5 years exp we would not be able to confirm this customer was a good match b/c that information is missing. I make the point to reiterate the importance of getting a completed customer record when you meet with the individual.
- NOTE: When searching from the job order side, OSOS will search all the O*Net Title' listed on a customer's record – as opposed to searching from the customer record, OSOS will only search the first O*Net Title listed on the customer's Objective tab. If you don't get the results you were hoping for, you should highlight a specific O*Net Title before starting your search.



- Sometimes you may say, “Hey wait a minute! What was in the job description again?”
- Guess what!
- You can navigate between the Customer and Employer Module in the Match Mode Process to compare the job order information with the customer information.



- Take a look at the Work History. This will give you a better understanding if the customer's experience relates to the job description. Sometimes there is information in the work history that may not be related to the O*Net code but does relate to the job order.
- Useful for folks interested in a career change: you can look at the transferable skills listed in the work history tab.
- Is the customer's employment objective just reviewed realistic based on their work and educational history.
- NOTE: Remember the previous slide – no yrs exp next to O'Net code? Yrs experience may be listed here instead. If so, could validate required experience that way. If you see that however, remember to go back later and update those fields in the customer record.

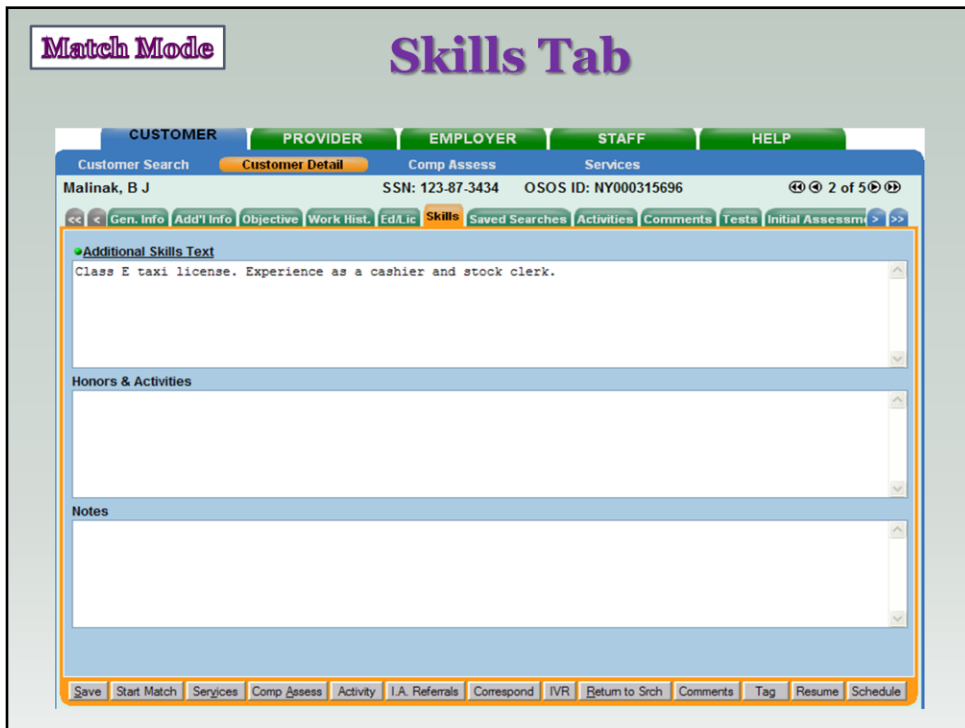
Match Mode

Ed/Lic Tab

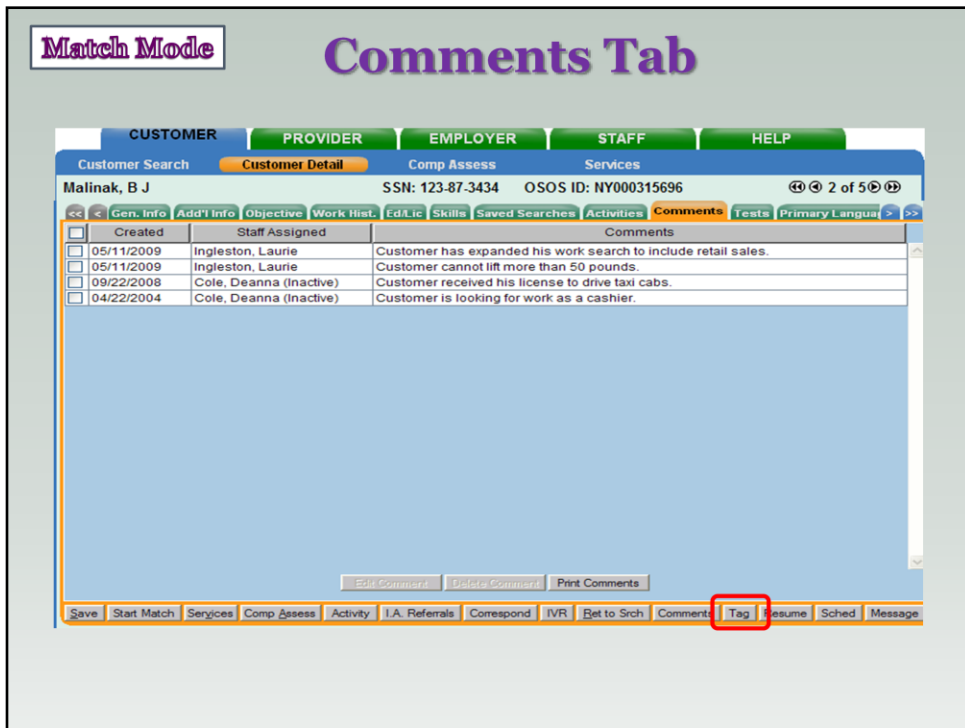
The screenshot displays a software interface for managing customer information. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these, a navigation bar includes Customer Search, Customer Detail (selected), Comp Assess, and Services. The main content area shows customer details for Malinak, B J, including SSN: 123-87-3434 and OSOS ID: NY000315696. The 'Ed/Lic' tab is active, showing a 'Driver License' section with radio buttons for 'Yes' (selected) and 'No', a dropdown for 'Class' (Class E (Tax/Livery)), and a dropdown for 'State'. Below this are checkboxes for various endorsements: Pass Transport, Hazardous Materials, Tank Vehicle, Motorcycle, School Bus, Doubles/Triples, Tank Hazard, and Air Brakes. The 'Certificates / Licenses' section is an empty table with columns for Certificate/License, Issue Date, Issuing Organization, State, and Country. Below it are buttons for 'Add Cert/Lic', 'Edit Cert/Lic', and 'Delete Selection'. The 'Schools' section is also an empty table with columns for Course of Study, Degree, Completed, Issuing Institution, State, and Country. Below it are buttons for 'Add School', 'Edit School', and 'Update Selection'. At the bottom, a menu bar contains buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Return to Srch, Comments, Tag, Resume, and Schedule.

Education/License: Used when a job requires a specific type of driver's license and/or endorsement or when a particular certification or professional license is required. Schools refer to High School, vocational or higher educational institutions.

Notice how nothing shows up under schools? This is where, if your customer has a degree, you would add what type of degree your customer has.

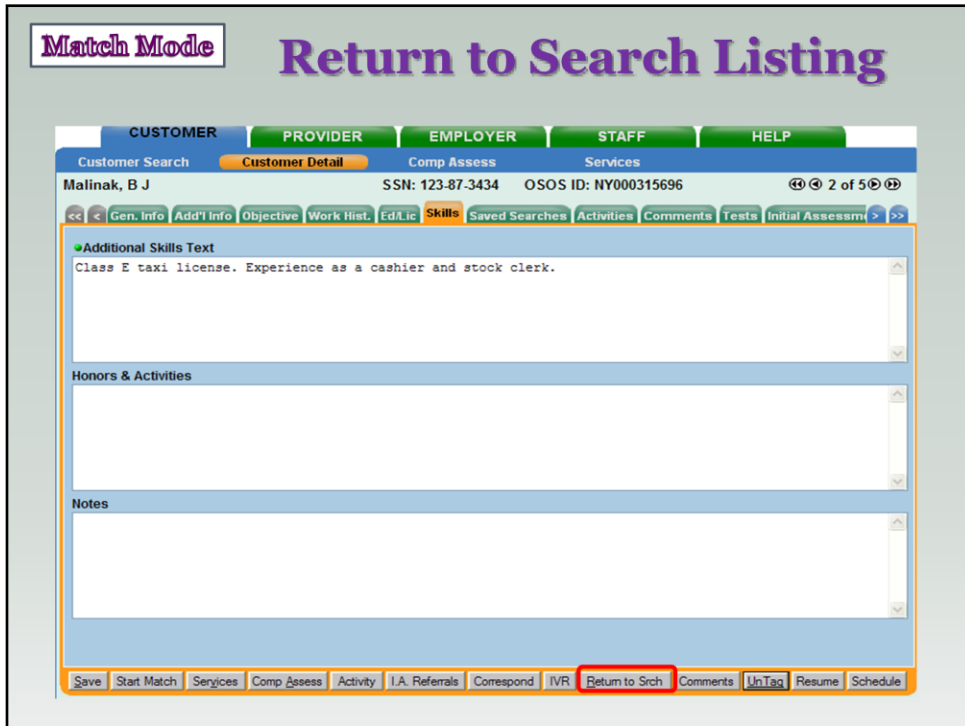


- Additional Skills can be helpful if a Job Order's O*Net was pulled, but the customer doesn't list corresponding work experience. Perhaps they possess a certain skill set from other jobs not listed on their OSOS record or from training.
- Remember when we used the skills info to help tailor previous matches- this is where skills information is helpful.



Comments matter- there might be work restrictions listed (can't work near children or lifting restrictions), a poor work history with specific businesses, etc. Either way, take a moment to review the comments tab.

If we see a customer that we think is a good fit for the job opening as we review both the customer record & the job order we can **Tag** the customer record for future reference. This way you can see all of the customers you believed were a good fit. You can find tag on every screen.



- After all customer records have been reviewed in the Customer Detail Window click on the **Return to Search** button.
- This button will be active on all Customer Detail screens during the match process.

The screenshot shows a web application interface with a navigation bar at the top containing tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with tabs for Customer Search, Customer Detail, Comp Assess, and Services. The main content area is titled '1 - 15 of 15' and features a search interface with various filters and a results table.

The search interface includes fields for 'Req License', 'Req Training', and 'Job Description'. Below these are search options for 'Objective Search', 'Skill Search', and 'Job Title Search', each with radio buttons for 'any' and 'all'. A 'Search For:' field is also present.

The results table below has the following columns: OSOS ID, Vet, Status, Seeker Name, and Objective. Three rows are highlighted in blue, indicating the best possible matches:

OSOS ID	Vet	Status	Seeker Name	Objective
NY012627331	No	Active	HOPKINS, JAMIE L	TO BE UPDATED
NY010444763	No	Active	Malinak, Anorak	Cashier
NY012627310	No	Active	Malinak, B J	Cashier, Customer Service
NY012627306	No	Active	Malinak, Barrack	Cashier
NY010442388	No	Active	Malinak, Buster	Full time Electrician, Cashier or Electrician's Helper.
NY012616366	No	Active	Malinak, Dilbert	Cashier, electrician
NY005719389	No	Active	Malinak, Match R	Sales associate, Retail Sales, Customer Service.
	No	Active	SMITH, JADE R	TO BE UPDATED

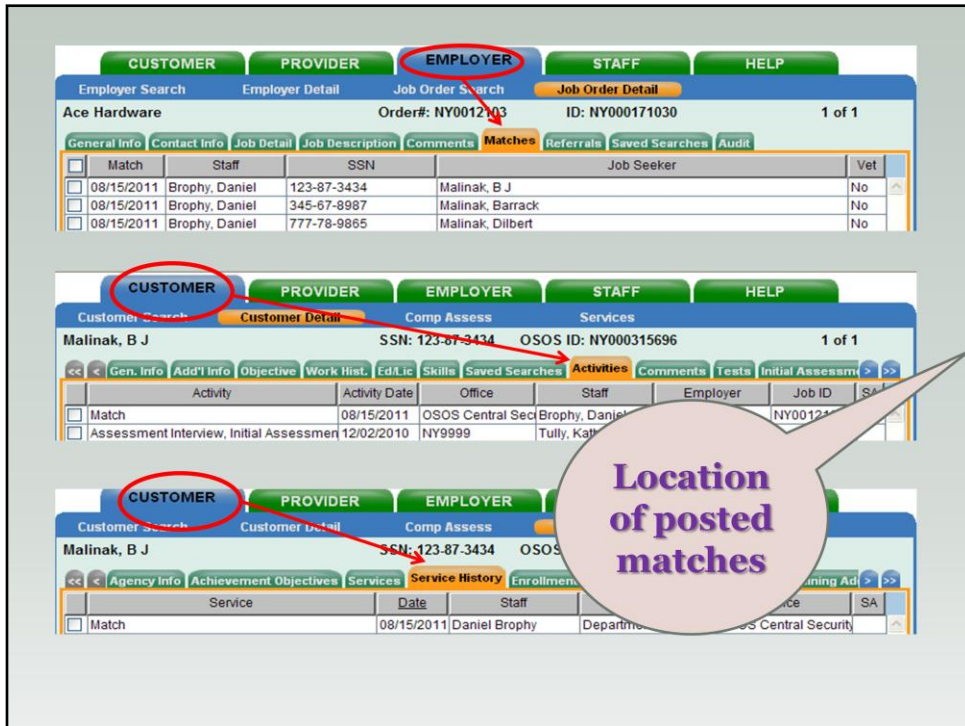
- After selecting “Return to Search,” we’re returned to the Customer Search tab.
- All of the customer records that we just Tagged during our review are now highlighted in blue on this screen.
- These 3 candidates are the best possible matches for the job order.

Posting the Match

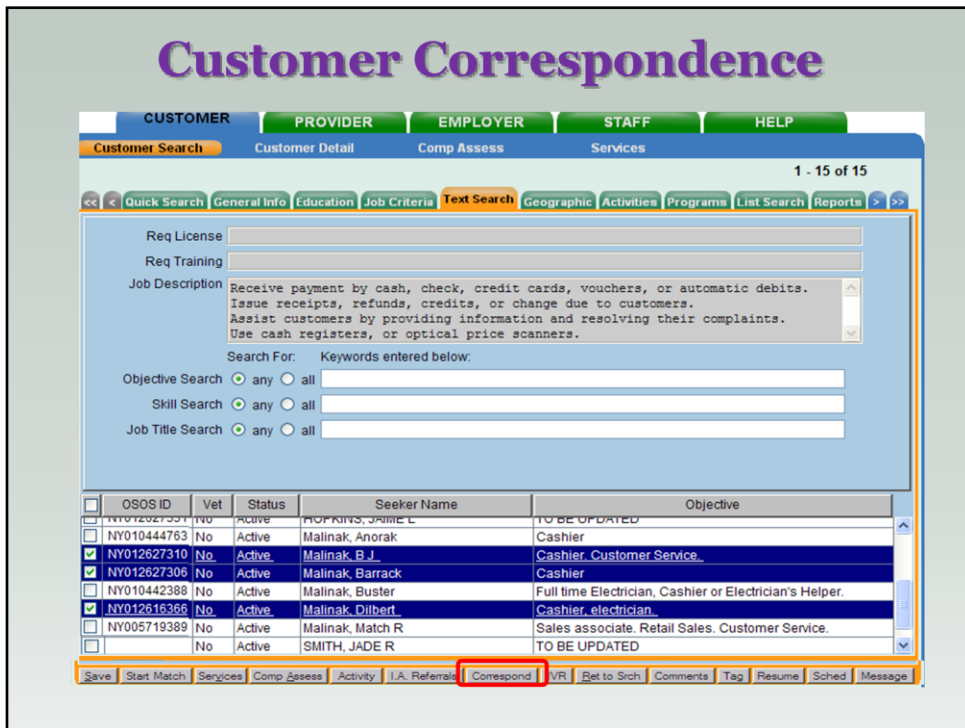
The screenshot shows a software interface with a menu bar (CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP) and a sub-menu (Customer Search, Customer Detail, Comp Assess, Services). The 'Text Search' tab is active. Below the search criteria, there is a table of search results. The table has columns: OSOS ID, Vet, Status, Seeker Name, and Objective. Three rows are checked, indicating matches. The 'Post Match' button is highlighted in red.

OSOS ID	Vet	Status	Seeker Name	Objective
NY012627301	No	Active	HOPKINS, JAMIE L	TO BE UPDATED
NY010444763	No	Active	Malinak, Anorak	Cashier
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Malinak, B J	Cashier, Customer Service
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Malinak, Barrack	Cashier
NY010442388	No	Active	Malinak, Buster	Full time Electrician, Cashier or Electrician's Helper.
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Malinak, Dilbert	Cashier, electrician
NY005719389	No	Active	Malinak, Match R	Sales associate, Retail Sales, Customer Service.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SMITH, JADE R	TO BE UPDATED

- Now that we have identified 3 customer's that best meet the job order's qualifications – or 3 Matches – we want to Post the Match.
- Click on the Post Match button. A Customer Matched message will appear briefly in the upper right of the window.
- No longer in the Match Mode Process.



- When a Customer is Matched to an order, the Match will be recorded in 3 places:
 - OSOS will automatically update the following tabs:
 - Employer Module – Matches tab
 - Customer Module – Activities tab
 - Customer Module – Service History
- At this time you are going to contact customers to see if they are interested in the position
 - DO WE SAY THAT WE WANT TO COLLECT A RESUME TO BE SHARED WITH BUSINESS SERVICES TO SHARE WITH BUSINESS OR NOT YET?
- Candidates should be encouraged to apply. The job order will say how the business wants to be contacted – email, phone, web - unless it's a suppressed job order. If suppressed, all information should be forwarded to the staffer listed on the order.
- Suppressed orders are job orders where the business contact information has been removed and replaced with a DOL contact so we can review all candidates before forwarding only the best fits to the business for consideration.



- To notify the customer about the job opening, you can contact them via phone, email or snail mail.
- If you chose to send something in writing (email or snail mail) you can use the OSOS Correspondence function on this screen.
- Click on the Correspond button to start OSOS Correspondence to generate a match letter to send to your customer or to do a mailing to multiple customers. (Check with your supervisors for the appropriate match letter to use).
- There is a separate OSOS user manual on Correspondence that can be found **WHERE??? VICKI???**



- This is the part of the Match process where you'd send correspondence to the customer. There is an OSOs User Guide on using Correspondence that you can reference. We do strongly encourage you to use Email instead of Snail Mail b/c our experience has been that we get a much better response rate from emails than from letters. It's also faster and less expensive (paper, postage, etc.).

Posting a Referral



We've shown you how to match a customer to a job order AND how to match a job order to a customer.

Once a match is made (and you've reached out to the customers) hopefully you'll start to get responses.

For those customers who say "YES!" they are interested in the job, you will need to record the match as a referral in OSOS.

1

A Referral is a service to the customer and will create or extend an enrollment.



Referrals



What is a Referral? A referral is ...

2

A referral service matches the customer's talents to the hiring needs of an employer.



Referrals



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What is a Referral? A referral will ...

3

A referral is usually done when the job seeking customer is at your desk and has agreed to pursue a particular lead

OR

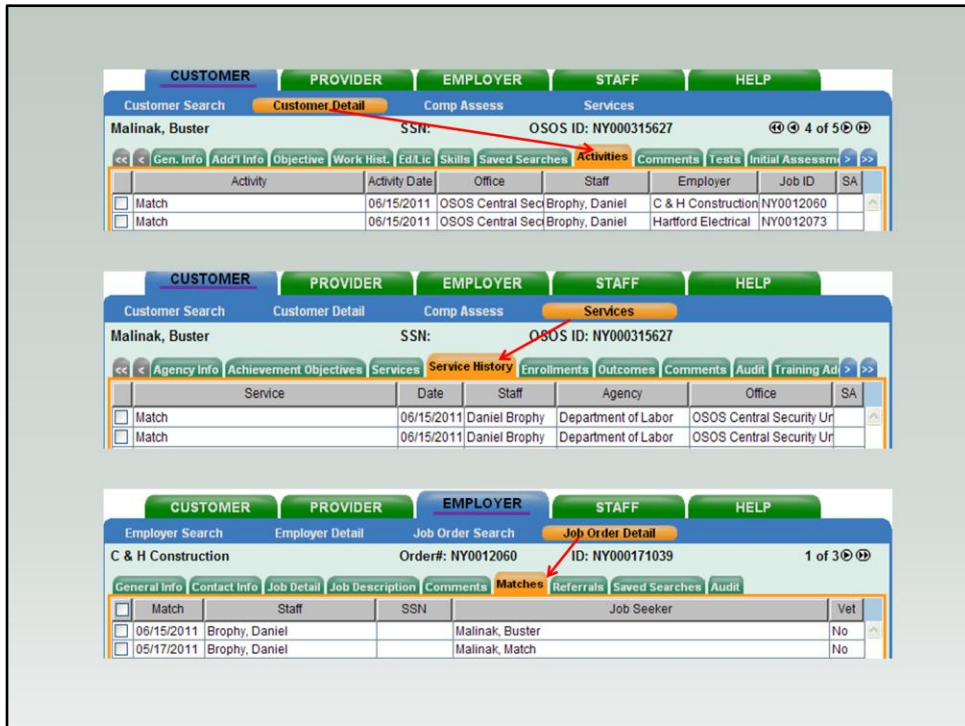
has returned correspondence indicating that they have applied to a particular job.



Referrals

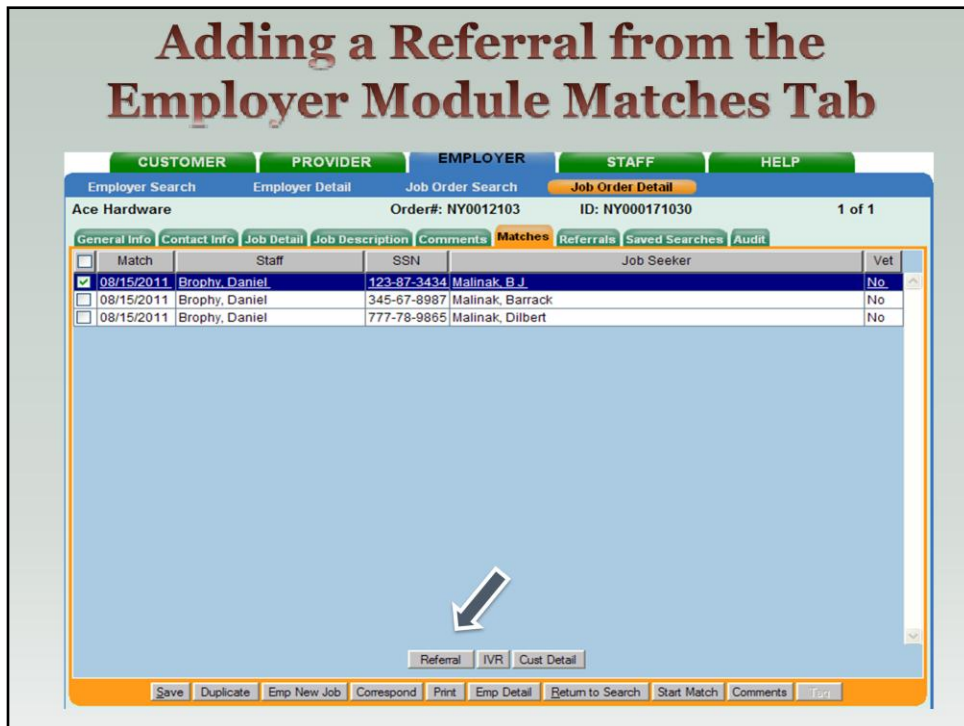


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- Remember when we showed you the match process from the customer record to the job order – these are the three places the match was recorded.
- The last one – the Employer Record – Job Order Detail – Matches tab – is where you need to start so you can record the referral.
- You need to start here regardless if you're matching from the customer to the order OR from the order to the customer.

Adding a Referral from the Employer Module Matches Tab



- Here is a close up view of the Employer Record – Job Order Detail – Match tab.
- Highlight the customer that you would like refer to the position and click on the Referral button.
- A “Customer Referred” message will appear briefly in the upper right of the window and the customer will be posted on the Referrals Tab

EMPLOYER

Wendy's
Order#: NY0013106 ID: NY000171035 5 of 5

SSN	Name	Vet	Date	Staff	Ref Meth.	Result	Pay At Hire	Unit
	Malinak, Match	No	08/17/2011	Brophy, Daniel	Staff Matching			

CUSTOMER

Malinak, Match R. SSN: OSOS ID: NY000339366 1 of 1

Activity	Activity Date	Office	Staff	Employer	Job ID	SA
Referred to Job FT Regular (Over 150 Day	08/17/2011	OSOS Central Sect	Brophy, Daniel	Wendy's	NY0013106	
Labor Exchange Enrollment	08/17/2011	OSOS Central Sect	Brophy, Daniel			Yes
Common Measures Enrollment	08/17/2011	OSOS Central Sect	Brophy, Daniel			

CUSTOMER

Malinak, Match R. SSN: OSOS ID: NY

Service	Date	Staff	Agency
Referred to Job FT Regular (Over 150 Days)	08/17/2011	Daniel Brophy	Department of Labor

Location of posted referrals

- Just like with the Job Match, the Referral it will be recorded in OSOS in 3 locations:
 - Employer Records – Job Order Detail – Referral tab
 - Customer Record – Customer Detail – Activities tab
 - Customer Records – Services – Services History tab



Best Practices

- ✓ **If you work in multiple offices, be sure to log-in to the proper office.**
- ✓ **Communicate with Labor Market Analysts and Business Services Team Members (gathering labor market intelligence), to discover employment opportunities outside the OSOS system.**
- ✓ **To protect customer confidentiality be careful when using a customer's Social Security Number; use the customer's OSOS ID whenever possible.**

To protect customer confidentiality be careful when using a customer's Social Security Number; use the customer's OSOS ID whenever possible.

- Never say the customer's SSN number out loud because it could be overheard.
- Do not leave papers with SSN numbers on your desk.
- Do not email SSN numbers.



Questions ?

NYOSOS data entry questions:

Help.OSOS@labor.ny.gov

**Phone: OSOS Help Desk
(518) 457-6586**

Thanks