

# **JobZone/OSOS Messaging Guide**



## PURPOSE

With the integration of JobZone as the customer self-service front end of OSOS, staff and customers now have the ability to communicate through the messaging features in JobZone (customers) and OSOS (staff). This guide will demonstrate how staff can use the messaging feature in OSOS, as well

## OSOS DATA ENTRY

### SENDING A MESSAGE TO A CUSTOMER

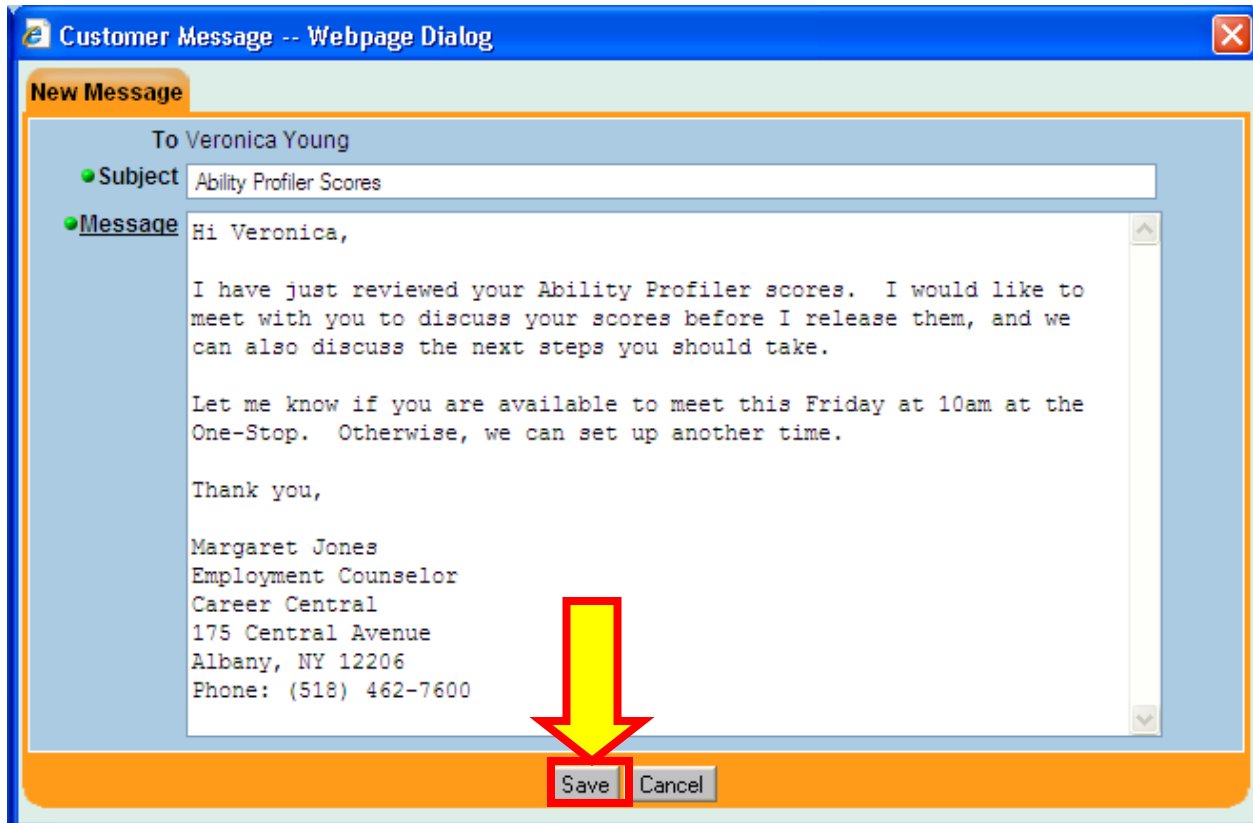
Once you have searched for a customer and have pulled up the record in OSOS, you will be able to see and click on the Message button on any screen in the **Customer Detail** window.

The screenshot displays the OSOS Customer Detail window for a customer named Veronica Young. The window is divided into several sections:

- Customer Data:** Includes fields for SSN (000-00-0000), Status (Active), Job Seeker (Active), Username (YouthTester05), Password (summerSYEPjobs), Last Name (Young), First Name (Veronica), MI, Date of Birth (01/01/1997), Gender (Female), Portfolio Lvl. (JobZone Adult), Address (90 Miller Lane), City (Albany), State (New York), Zip (12221), County (Albany), Country (United States), Metro, Phone (518-777-7777), Ext., Alt., Fax, and Email (Veronica.Young34@gmail.com). It also has checkboxes for U.S. Citizen (checked) and JZ/CZ Manager.
- Ethnic Heritage:** Radio buttons for Hispanic or Latino, Not Hispanic or Latino, and Not Disclosed (selected).
- Race:** Checkboxes for Alaskan or American Indian, Asian, Black or African American, Hawaiian or Pacific Islander, White, and Not Disclosed (checked).
- Education & Employment:** Includes Education Level (12 Grade - no Diploma), School Status (Not attending school or H.S. Dropout), and Employment Status (Not Employed).
- Contact Preferences:** Checkboxes for Use Postal, Fax, Pri. Phone (checked), Email (checked), and Alt. Phone.
- Customer Assignment:** Shows Staff Assigned (Jones, Margaret), Registered (06/06/2012), WIB Assigned (Albany/Rensselaer/Schenectady Counties), Origin (Staff), Agency (Department of Labor), Office (ALBANY), Profiled, Profiled Date, and UI Claimant.

At the bottom of the window, there is a row of buttons: Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message. The Message button is highlighted with a red box and a yellow arrow pointing to it.

After clicking on the **Message** button, a pop-up window will appear with your customer's name populated. To send a message, you will need to populate both of the required **Subject** and **Message** fields. When you are finished, click on the **Save** button to send the message.



Customer Message -- Webpage Dialog

**New Message**

To Veronica Young

• **Subject** Ability Profiler Scores

• **Message** Hi Veronica,

I have just reviewed your Ability Profiler scores. I would like to meet with you to discuss your scores before I release them, and we can also discuss the next steps you should take.

Let me know if you are available to meet this Friday at 10am at the One-Stop. Otherwise, we can set up another time.

Thank you,

Margaret Jones  
Employment Counselor  
Career Central  
175 Central Avenue  
Albany, NY 12206  
Phone: (518) 462-7600

Save Cancel



*Once you click **Save**, the message will be sent and the customer will receive a notification email at the email address listed in OSOS that a new message is available to view in JobZone. As a best practice and to ensure customers receive notifications of these messages, be sure to confirm that the customer's email address in OSOS is correct and up-to-date.*

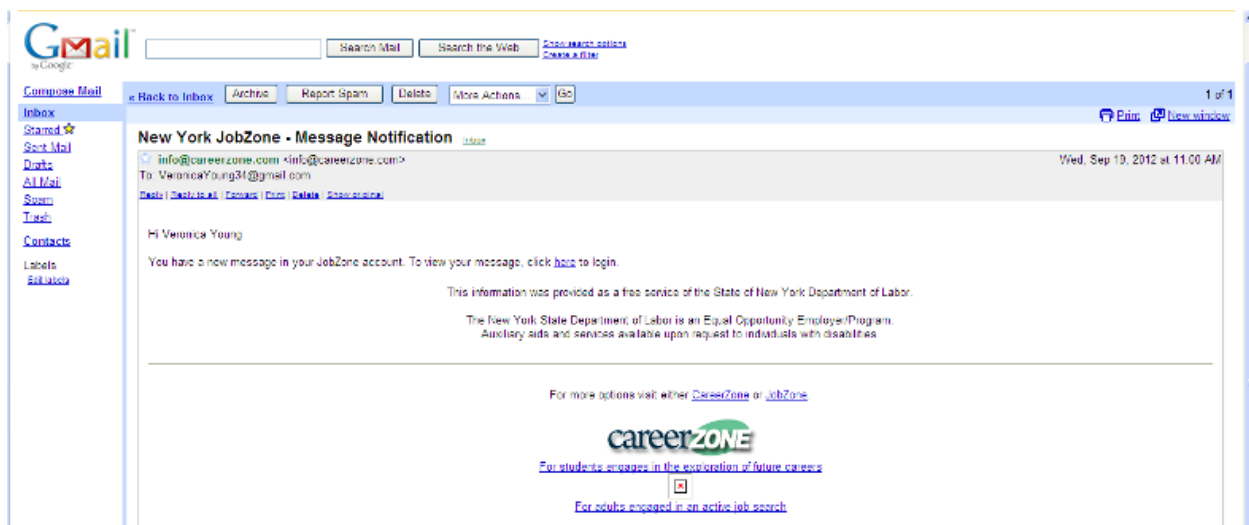


## CUSTOMER NOTIFICATION AND RESPONSE

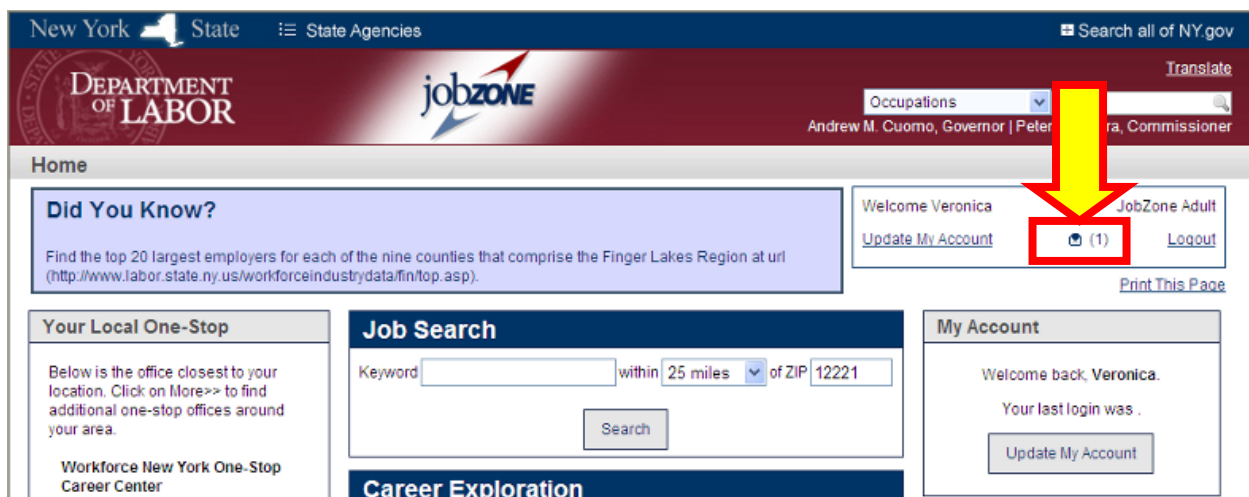
When the message is sent, the customer will receive an email notification message similar to the one below, at the email address listed for the customer in OSOS. The message will state:

*You have a new message in your JobZone account. To access your message, click [here](#) to login.*

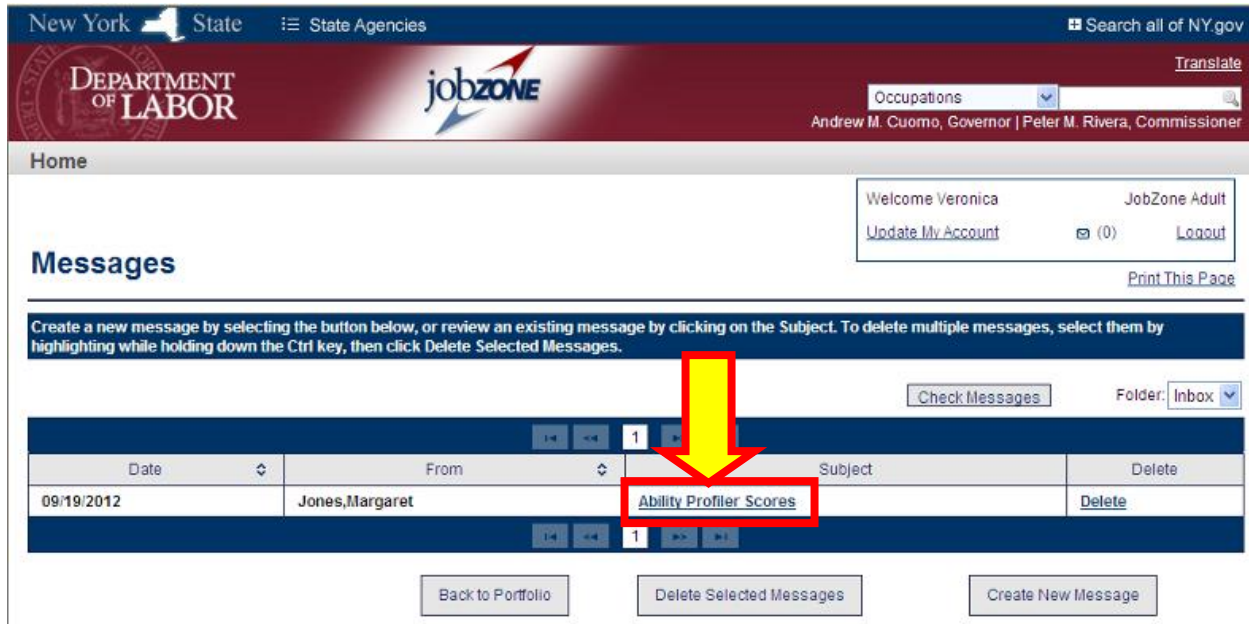
The customer can then click on the link to navigate to Jobzone. Be sure to inform your customers that the notification emails will be sent from [info@careerzone.com](mailto:info@careerzone.com), and will have a subject line of *New York JobZone - Message Notification*, so that they can adjust their email settings and be prepared to receive these messages.



The customer will need to log in to JobZone to access the message. In the upper right hand of the customer's JobZone homepage, the number in parentheses next to the envelope icon will indicate the number of new messages the customer has received (e.g., in this example, the customer has one new message). The customer should click here to review the messages.



This will bring the customer to the **Messages** page of their JobZone account. For all messages the customer has received, it will display the date the message was received, who sent the message and the subject of the message. The customer can click on the message subject under **Subject** to open the message.



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Home

Welcome Veronica JobZone Adult  
[Update My Account](#) (0) [Logout](#)

**Messages** [Print This Page](#)

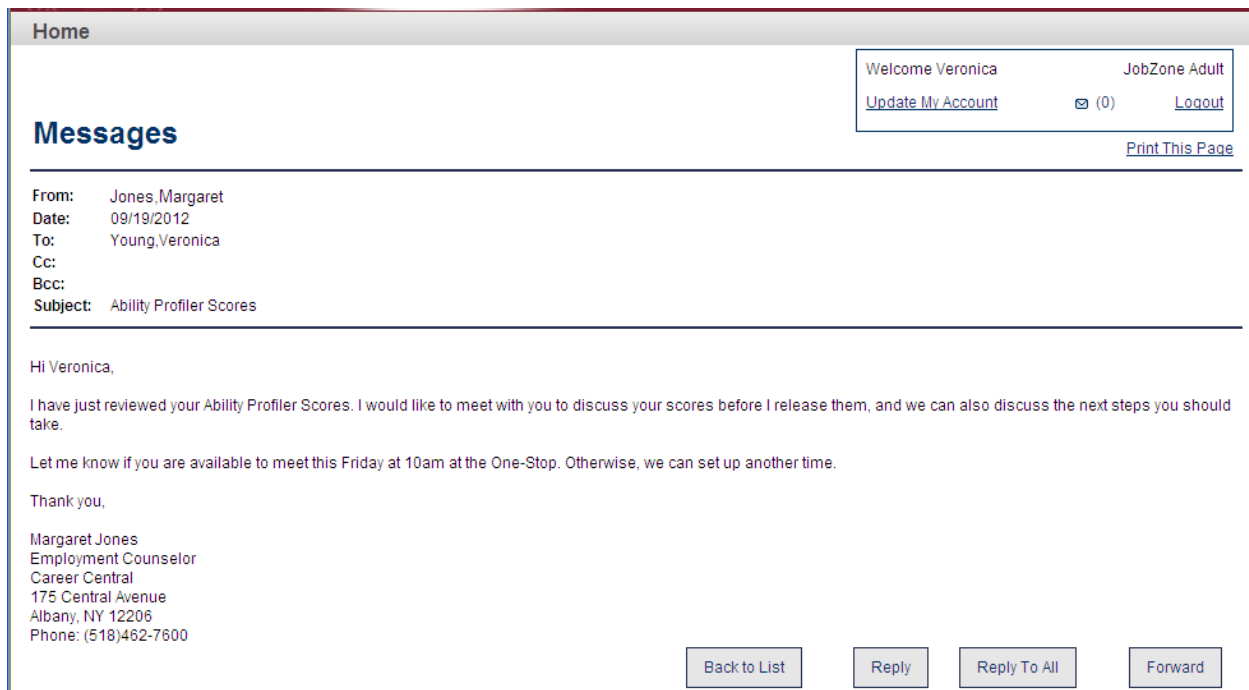
Create a new message by selecting the button below, or review an existing message by clicking on the Subject. To delete multiple messages, select them by highlighting while holding down the Ctrl key, then click Delete Selected Messages.

[Check Messages](#) Folder:

| Date       | From            | Subject                        | Delete                 |
|------------|-----------------|--------------------------------|------------------------|
| 09/19/2012 | Jones, Margaret | <b>Ability Profiler Scores</b> | <a href="#">Delete</a> |

[Back to Portfolio](#) [Delete Selected Messages](#) [Create New Message](#)

The customer can review the message and has the options to print, reply to or forward the message.



Home

Welcome Veronica JobZone Adult  
[Update My Account](#) (0) [Logout](#)

**Messages** [Print This Page](#)

From: Jones, Margaret  
 Date: 09/19/2012  
 To: Young, Veronica  
 Cc:  
 Bcc:  
 Subject: Ability Profiler Scores

Hi Veronica,

I have just reviewed your Ability Profiler Scores. I would like to meet with you to discuss your scores before I release them, and we can also discuss the next steps you should take.

Let me know if you are available to meet this Friday at 10am at the One-Stop. Otherwise, we can set up another time.

Thank you,

Margaret Jones  
 Employment Counselor  
 Career Central  
 175 Central Avenue  
 Albany, NY 12206  
 Phone: (518)462-7600

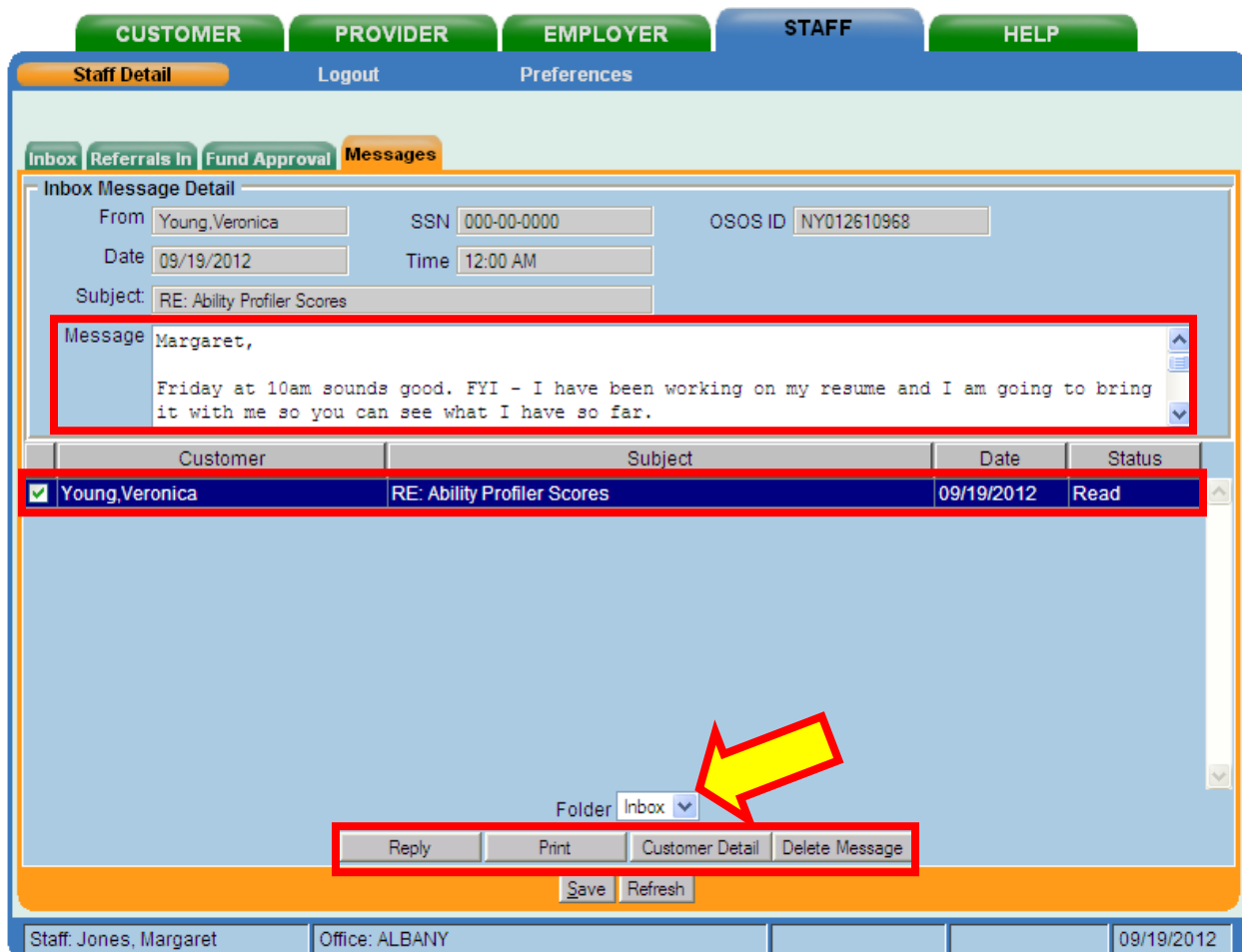
[Back to List](#) [Reply](#) [Reply To All](#) [Forward](#)

## STAFF MESSAGES TAB - INBOX FOLDER

Once the customer has responded in JobZone, you will be able to view the customer's reply in OSOS on the **Messages** tab of the **Staff Detail** window in the **Staff** module. By default, you are in the *Inbox* folder of the tab (messages received). When the customer's message is selected in the list, you will be able to view the customer's message - you may need to scroll down to read the entire message.

For the selected message, you will have the following options available as buttons at the bottom of the screen.

- **Reply:** This brings up the pop-up messaging window containing the entire messaging thread between you and your customer, and you can send a reply
- **Print:** This will format the message in a printer-friendly format in a new window and you can print the customer's message
- **Customer Detail:** This will take you to the **Gen. Info** tab of the customer's record
- **Delete Message:** This will bring up a pop-up window with the text: *Do you really want to delete the selected Message(s)?* - you can click **OK** to delete the message



The screenshot shows the OSOS Staff Detail window with the Messages tab selected. The message details are as follows:

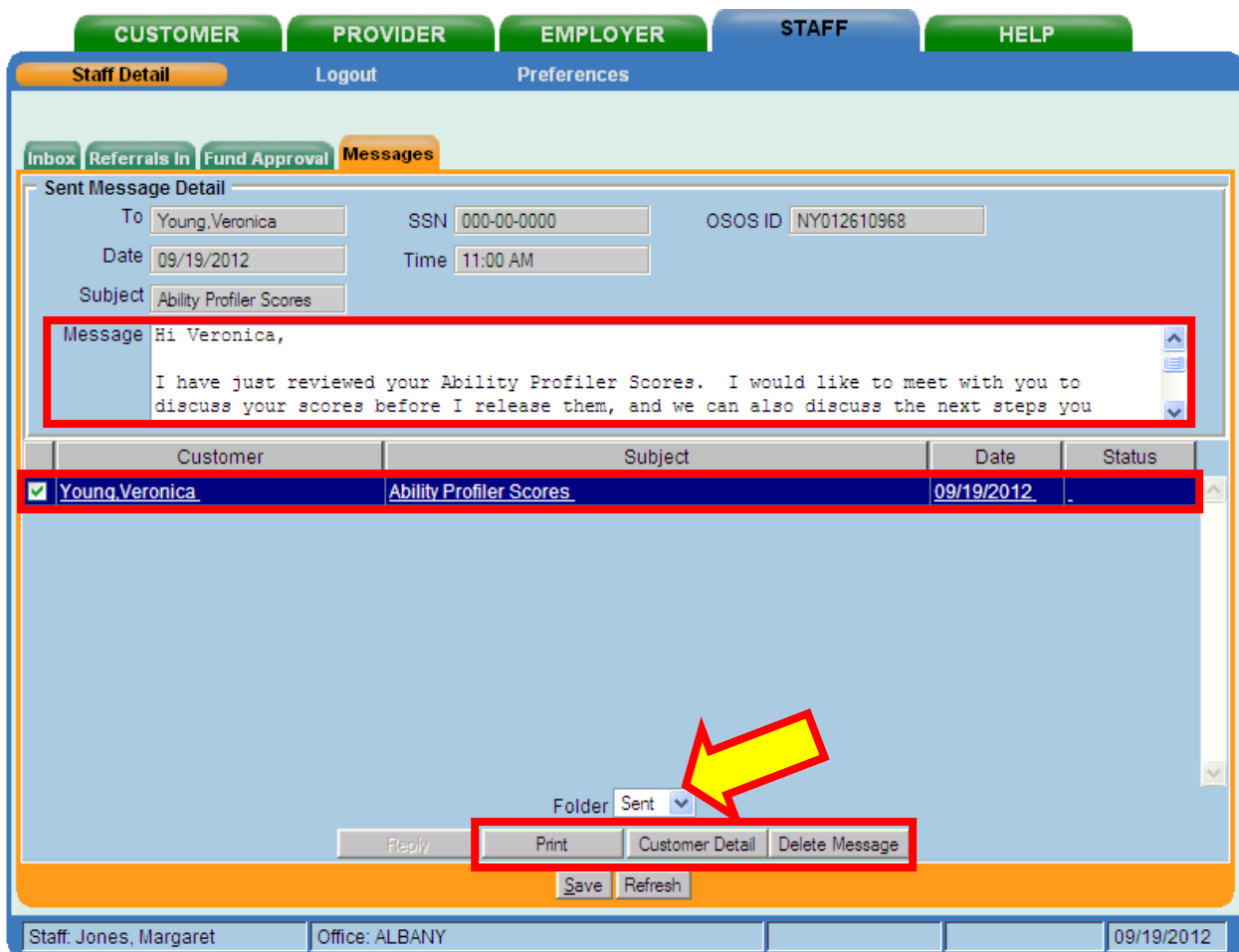
| Customer  | Subject                     | Date       | Status |
|---|-----------------------------|------------|--------|
| <input checked="" type="checkbox"/> Young, Veronica | RE: Ability Profiler Scores | 09/19/2012 | Read   |

At the bottom of the window, the following buttons are visible: Reply, Print, Customer Detail, Delete Message, Folder (Inbox), Save, and Refresh.

## STAFF MESSAGES TAB - SENT FOLDER

To view your sent messages, you can click on the **Folder** drop-down field and switch from *Inbox* to *Sent*. You will then be able to view all of the messages you have sent to customers.

Similarly to the *Inbox* folder, you may need to scroll through to read a selected message. Notice that the **Reply** button is inactivated, but the **Print**, **Customer Detail** and **Delete Message** buttons are still active.



The screenshot shows the OSOS Staff Messages interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF (selected), and HELP. Below these are buttons for Staff Detail, Logout, and Preferences. The Messages tab is active, showing a list of messages. The selected message is displayed in a detail view, and a table below it lists the message details.

| Customer   | Subject                 | Date       | Status |
|--|-------------------------|------------|--------|
| <input checked="" type="checkbox"/> Young,Veronica | Ability Profiler Scores | 09/19/2012 | .      |

At the bottom of the interface, there is a Folder dropdown menu set to 'Sent'. Below it are buttons for Reply, Print, Customer Detail, and Delete Message. The Print, Customer Detail, and Delete Message buttons are highlighted with a red box. A yellow arrow points to the Folder dropdown menu.



*For both the Inbox and Sent folders of the Staff **Messages** tab, if a message has just been sent or received, it is possible that the message will not display immediately. If this is the case, you can click the **Refresh** button at the bottom of the screen to refresh the data and all of the received/sent messages should then display.*



## **RESOURCES AND ASSISTANCE**

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

<http://labor.ny.gov/workforcenypartners/tools.shtm>

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: [help.osos@labor.ny.gov](mailto:help.osos@labor.ny.gov)