

# **Matching & Referring from the Job Order to the Customer Record OSOS Guide**



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## **PURPOSE**

This guide is intended to help staff understand the basics of performing job order matching and job referrals. Job matching is a process that compares information on the customer's OSOS record with information on open job orders to determine if the customer's experience and education meets the business' needs/requirements.

Staff should be conducting job matches, with or without the customer present, to identify open job orders that are a good fit for the customer.

The guide will walk through the steps of how to:

- Perform a job order search
- Review desired job orders
- Search, match, and refer customers to a job order

## JOB ORDER SEARCH

### JOB ORDER SEARCH - JOB ORDER NUMBER

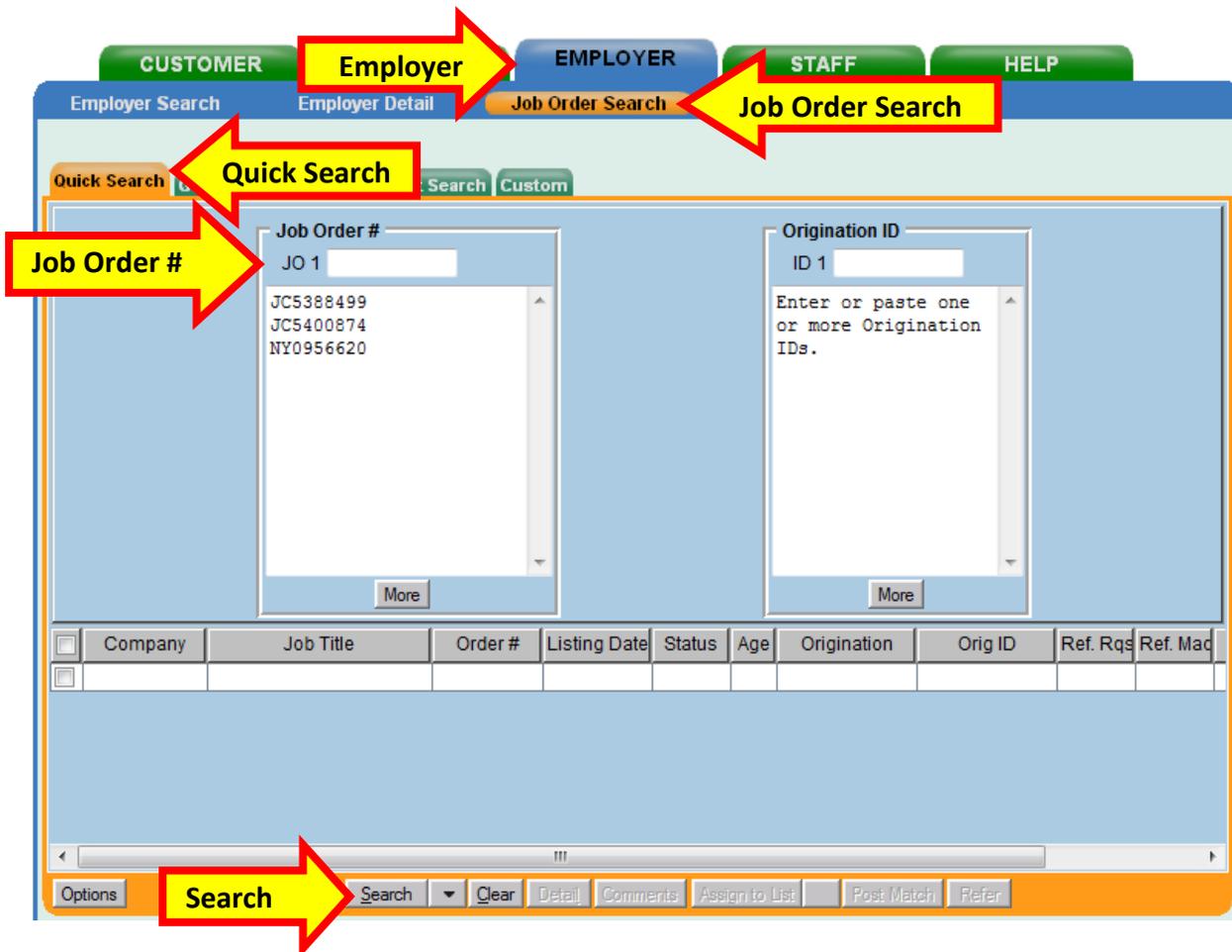
The most common method used to search for a job order is by the job order number.

To perform a job order search, select the **Employer** module, then the **Job Order Search** window, and then use the **Quick Search** tab.

Add the job order number or multiple job order numbers in the **Quick Search** tab.



The job order number search is a standalone search. It is not necessary to add any additional search criteria.



The screenshot shows the OSOS interface for Job Order Search. At the top, there are navigation tabs: CUSTOMER, EMPLOYER, STAFF, and HELP. The EMPLOYER tab is selected, and within it, the Job Order Search window is open. Inside this window, there are sub-tabs: Employer Search, Employer Detail, and Job Order Search. The Job Order Search sub-tab is active, showing a 'Quick Search' section with two input fields: 'Job Order #' and 'Origination ID'. The 'Job Order #' field contains 'JO 1' and a list of job order numbers: JC5388499, JC5400874, and NY0956620. The 'Origination ID' field contains 'ID 1' and a prompt: 'Enter or paste one or more Origination IDs.'. Below these fields is a table with columns: Company, Job Title, Order #, Listing Date, Status, Age, Origination, Orig ID, Ref. Rqs, and Ref. Mac. At the bottom of the window, there is a 'Search' button and several other buttons: Options, Clear, Detail, Comments, Assign to List, Post Match, and Refer.

## JOB ORDER SEARCH - GENERAL INFO TAB

If the job order number is unknown, search by using the **General Info** tab.

When filling out this tab leave the **Order Status** "Open", do not look at closed orders when matching. Enter the **O\*Net Title(s)**, **Job Location (County)** and/or **Company Name** if there is a specific business to match for.

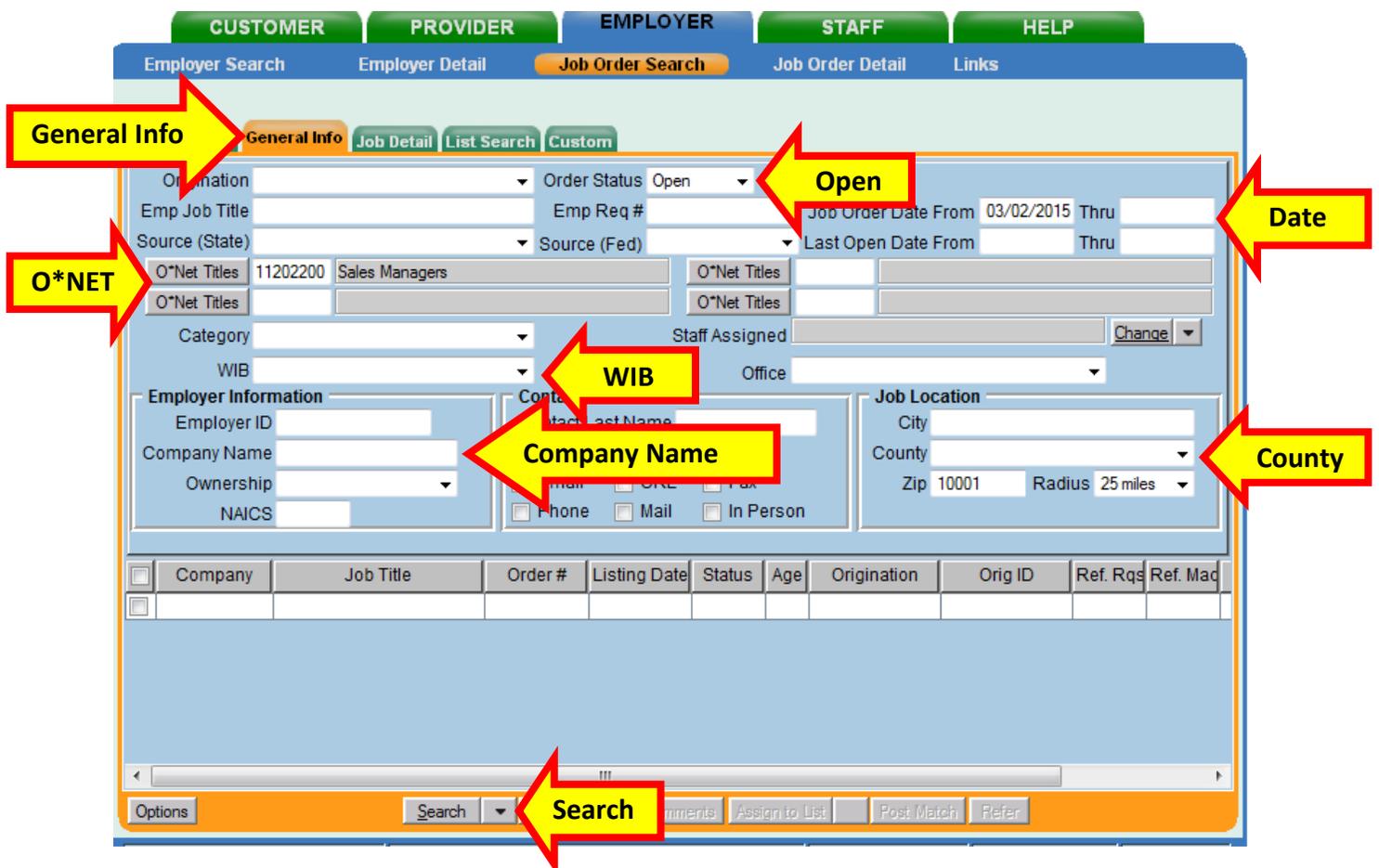


As a best practice, when entering the **Job Order Date** pick a date that is a week before the current date and leave the **Thru** data field blank. This search will yield results for open job orders posted in the last week.

Click the **Search** button on the bottom of the screen to start the search.



Searching by multiple O\*Net Titles will provide one inclusive set of results.



The screenshot shows the 'Job Order Search' interface with the 'General Info' tab selected. Red arrows point to the following fields:

- General Info**: Points to the 'General Info' sub-tab.
- O\*NET**: Points to the 'O\*Net Titles' input fields.
- Open**: Points to the 'Order Status' dropdown menu.
- Date**: Points to the 'Job Order Date From' and 'Thru' date fields.
- WIB**: Points to the 'WIB' dropdown menu.
- Company Name**: Points to the 'Company Name' input field.
- County**: Points to the 'County' dropdown menu.
- Search**: Points to the 'Search' button at the bottom.

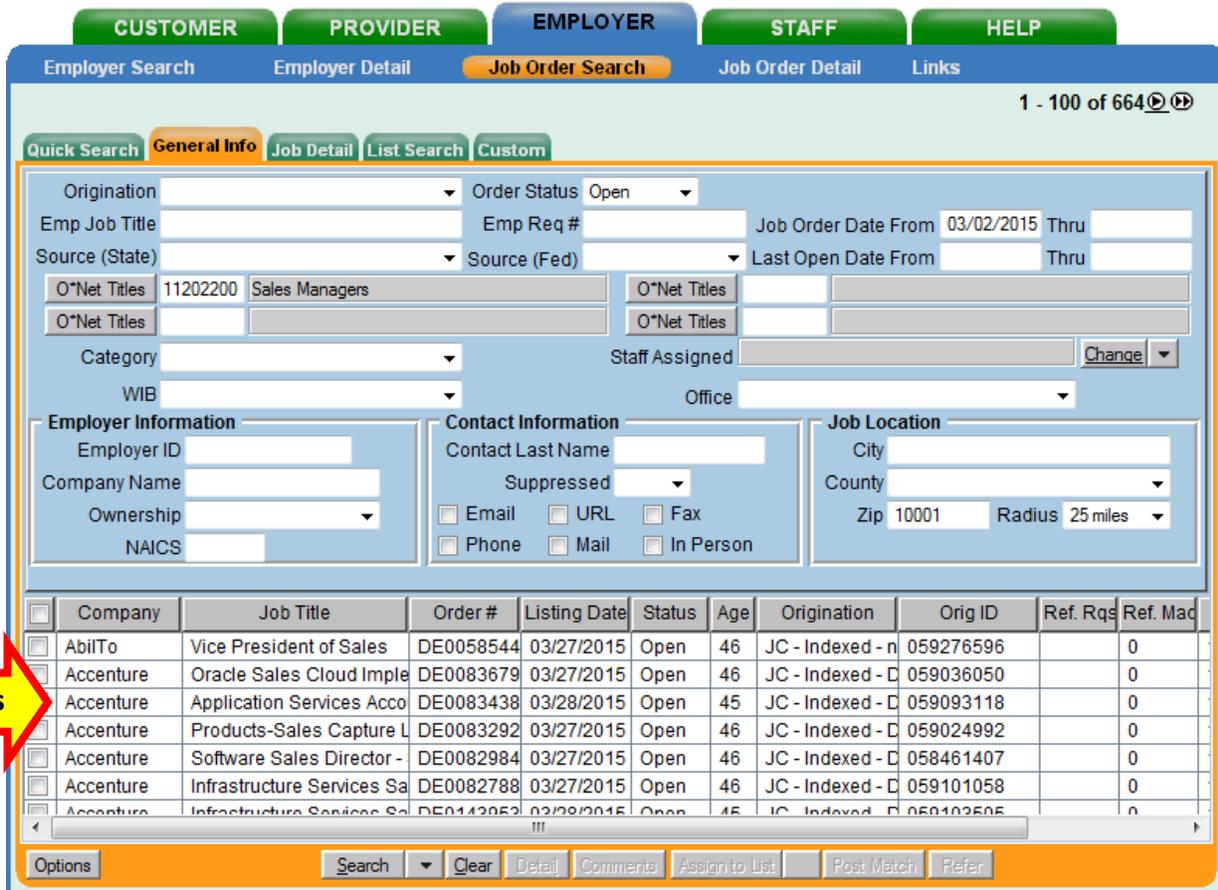
The form includes sections for 'Employer Information' (Employer ID, Company Name, Ownership, NAICS) and 'Job Location' (City, County, Zip, Radius). A table at the bottom lists search results with columns: Company, Job Title, Order #, Listing Date, Status, Age, Origination, Orig ID, Ref. Rqs, and Ref. Mac.

## JOB ORDER SEARCH - RESULTS

Successful search results will be displayed on the bottom of each **Job Order Search** screen.



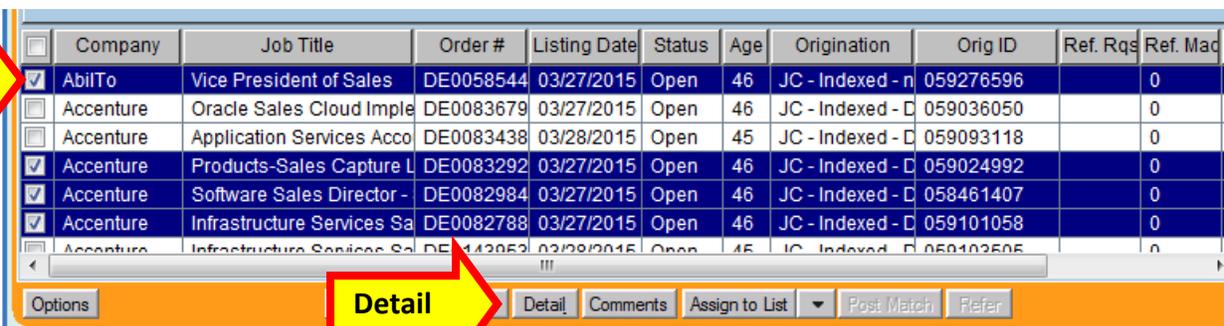
If the WIB is included in the search, the search will only yield staff-entered job orders; the more data fields completed, the narrower the results will be.



The screenshot shows the OSOS Job Order Search 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), Job Order Detail, and Links. The main area contains search filters for Origination, Order Status, Emp Job Title, Emp Req #, Job Order Date, Source, Source (Fed), Last Open Date, O\*Net Titles, Category, Staff Assigned, WIB, Office, Employer Information, Contact Information, and Job Location. Below the filters is a table of search results. A red arrow points to the 'Results' column header in the table.

Company	Job Title	Order #	Listing Date	Status	Age	Origination	Orig ID	Ref. Rqs	Ref. Mac
AbilTo	Vice President of Sales	DE0058544	03/27/2015	Open	46	JC - Indexed - n	059276596		0
Accenture	Oracle Sales Cloud Imple	DE0083679	03/27/2015	Open	46	JC - Indexed - D	059036050		0
Accenture	Application Services Acco	DE0083438	03/28/2015	Open	45	JC - Indexed - D	059093118		0
Accenture	Products-Sales Capture L	DE0083292	03/27/2015	Open	46	JC - Indexed - D	059024992		0
Accenture	Software Sales Director -	DE0082984	03/27/2015	Open	46	JC - Indexed - D	058461407		0
Accenture	Infrastructure Services Sa	DE0082788	03/27/2015	Open	46	JC - Indexed - D	059101058		0
Accenture	Infrastructure Services Sa	DE0142053	03/28/2015	Open	45	JC - Indexed - D	059102505		0

Highlight the job orders to review and click the **Detail** button.



The screenshot shows the same table as above, but with several rows highlighted in blue. A red arrow points to the 'Check' checkbox in the first row, and another red arrow points to the 'Detail' button in the bottom toolbar.

Company	Job Title	Order #	Listing Date	Status	Age	Origination	Orig ID	Ref. Rqs	Ref. Mac
<input checked="" type="checkbox"/>	AbilTo	Vice President of Sales	DE0058544	03/27/2015	Open	46	JC - Indexed - n	059276596	0
<input type="checkbox"/>	Accenture	Oracle Sales Cloud Imple	DE0083679	03/27/2015	Open	46	JC - Indexed - D	059036050	0
<input type="checkbox"/>	Accenture	Application Services Acco	DE0083438	03/28/2015	Open	45	JC - Indexed - D	059093118	0
<input checked="" type="checkbox"/>	Accenture	Products-Sales Capture L	DE0083292	03/27/2015	Open	46	JC - Indexed - D	059024992	0
<input checked="" type="checkbox"/>	Accenture	Software Sales Director -	DE0082984	03/27/2015	Open	46	JC - Indexed - D	058461407	0
<input checked="" type="checkbox"/>	Accenture	Infrastructure Services Sa	DE0082788	03/27/2015	Open	46	JC - Indexed - D	059101058	0
<input type="checkbox"/>	Accenture	Infrastructure Services Sa	DE0142053	03/28/2015	Open	45	JC - Indexed - D	059102505	0



To customize the search results, click the **Options** button to open the Job Search Result Columns dialog box and select the columns and sorting order preferred.

Job Search Result Columns -- Webpage Dialog

**Result Columns** **Sort Options**

**--Job Information--**

- Job Order 
  - Employer ID
  - Empl Contact ID
  - Status
  - Status Date
  - Last Open Date
  - Order Date
  - Modify Time
  - Access Time
  - O\*Net Title
  - Emp. Job Title
  - Category
  - Source (Fed)
  - Source (State)
  - Affirmative Action
  - Emp Req #
  - Origination Method
  - Origination ID
  - Office
  - Staff Assigned
  - DVOP
  - LVER
- Address 2
- City
- State
- ZIP Code
- County
- Country
- Regional Flag

**--Contact Detail / Methods--**

- Suppress Job
- Job URL
- Email
- URL
- Fax
- Phone
- Mail
- In Person

**--Job Details--**

- Referrals Rqstd
- Referrals Made
- Openings
- Hires
- Duration
- Hours Per Week
- Shift
- Education Reqd
- Norm Educ (Yrs)
- Education String
- Reqd Exp (Mths)
- Keyboard Speed
- Public Transport.
- Req. Lic/Cert/Reg
- Req Deg/Training
- Work Varies Flag
- Mon
- Tue
- Wed
- Thu
- Fri
- Sat
- Sun
- Minimum Salary
- Min Normalized Sal
- Maximum Salary
- Max Normalized Sal
- Salary Unit
- Class
- Tank Vehicle
- Doubles/Triples
- Pass Transport
- Haz. Materials

**--Employer Information--**

- School Bus
- Tank Veh Haz Mat
- Air Brakes
- Motorcycle
- Age
- Job Description
- Company
- Legal Name
- Status
- State EIN
- FEIN
- Location Suffix
- Tax Class
- NAICS
- Ownership
- FCJL Expires
- Federal Flag
- # Employees
- # Seasonal hires

**--Employer Contact--**

- EC Status
- EC Staff Assigned
- Last Name
- First Name
- Contact Title
- Cont. Address 1
- Cont. Address 2
- Cont. City
- Cont. State
- Cont. ZIP Code
- Cont. Country
- Cont. Phone
- Cont. Ext.
- Cont. Alt. Phone
- Cont. Alt. Ext.
- Cont. Fax
- Cont. Email
- Salutation
- Contact Name

Company	Job Title	Order #	Listing	Status	Age	Origination	Orig ID	Ref.	Ref.	Ope
<										>

Set as My Defaults  Save Cancel Show My Defaults Show System Defaults

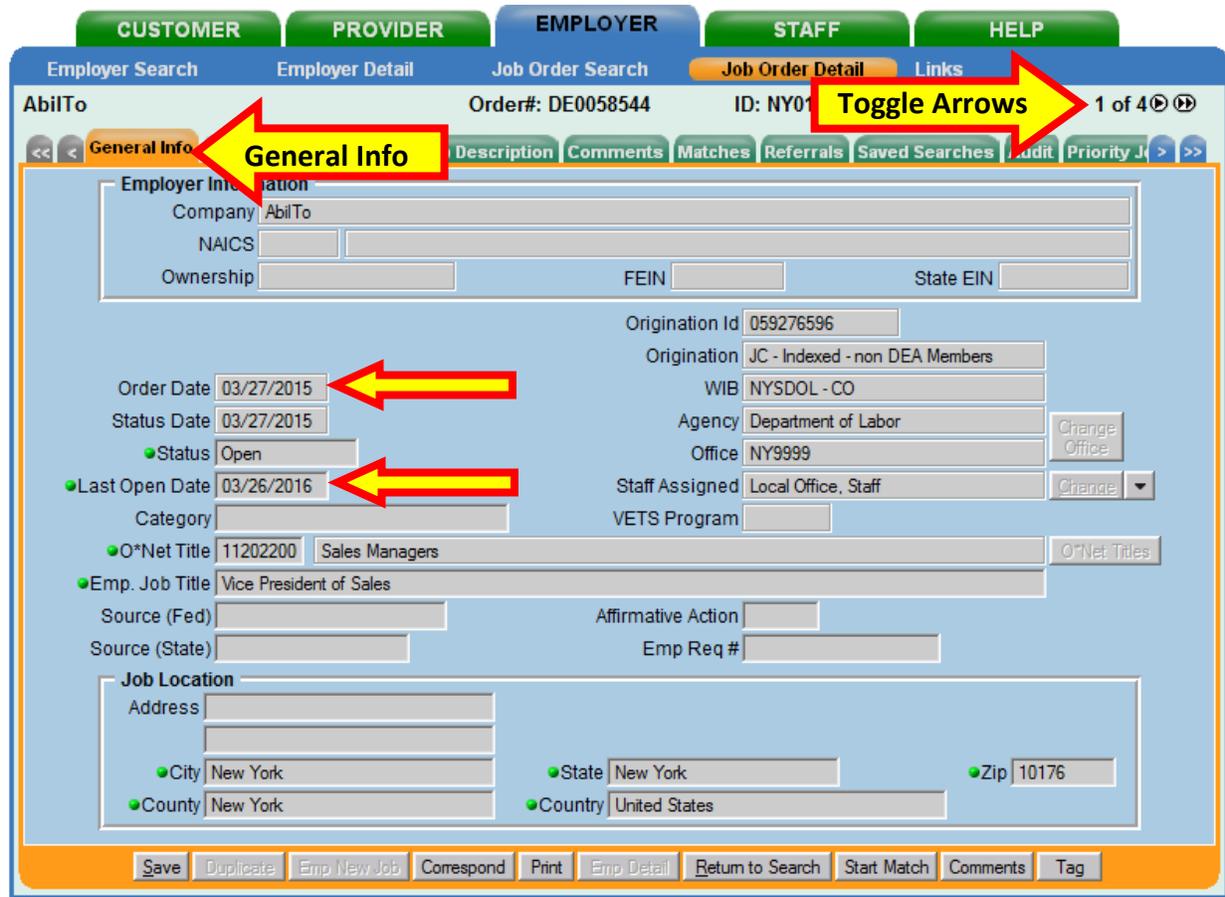
## REVIEWING THE JOB ORDERS

Review the job orders before beginning a match. Review the information in all tabs of the **Job Order Detail** window.

If multiple results are selected, toggle through the job orders using the arrows on the upper right.

In the **General Info** tab, check the **Order Date** data field to see how long the job order has been open. If the date listed in this field is more than 2 months old, research the job order to see if the position is still available. If the job order is current, continue with the matching process.

The **Last Open Date** data field indicates how long the job order will remain open.

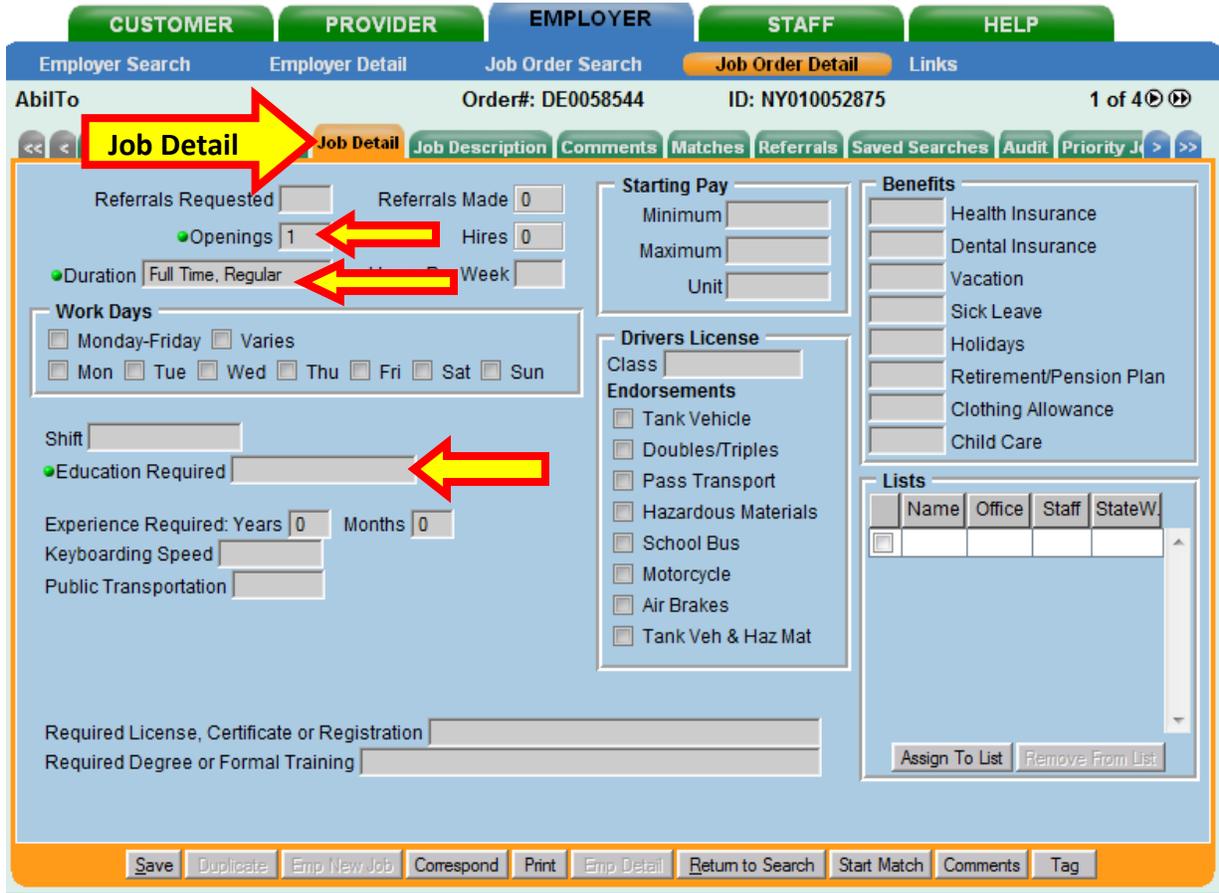


The screenshot shows the OSOS Job Order Detail window for Order# DE0058544. The 'General Info' tab is selected. The 'Order Date' is 03/27/2015 and the 'Last Open Date' is 03/26/2016. The job is for 'Sales Managers' at 'AbilTo' in New York. The status is 'Open'. The 'Toggle Arrows' control is located in the top right corner of the window.

Field	Value
Company	AbilTo
NAICS	
Ownership	
FEIN	
State EIN	
Order Date	03/27/2015
Status Date	03/27/2015
Status	Open
Last Open Date	03/26/2016
Category	
O*Net Title	11202200 Sales Managers
Emp. Job Title	Vice President of Sales
Source (Fed)	
Source (State)	
Affirmative Action	
Emp Req #	
City	New York
County	New York
State	New York
Country	United States
Zip	10176

## JOB DETAIL TAB

The **Job Detail** tab provides information regarding specific details including, the number of **Openings**, **Duration**, and **Education** requirements.



The screenshot shows the 'Job Detail' tab in the OSOS system. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a search bar with 'AbilTo' and 'Order#: DE0058544' and 'ID: NY010052875'. The 'Job Detail' tab is selected, and several fields are highlighted with red arrows:

- Job Detail** (tab)
- Openings**: 1
- Duration**: Full Time, Regular
- Education Required**: [Text Field]

Other visible fields include:

- Referrals Requested: [Text Field]
- Referrals Made: 0
- Hires: 0
- Starting Pay: Minimum [Text Field], Maximum [Text Field], Unit [Text Field]
- Benefits: Health Insurance, Dental Insurance, Vacation, Sick Leave, Holidays, Retirement/Pension Plan, Clothing Allowance, Child Care
- Drivers License: Class [Text Field]
- Endorsements: Tank Vehicle, Doubles/Triples, Pass Transport, Hazardous Materials, School Bus, Motorcycle, Air Brakes, Tank Veh & Haz Mat
- Work Days: Monday-Friday, Varies, Mon, Tue, Wed, Thu, Fri, Sat, Sun
- Shift: [Text Field]
- Experience Required: Years 0, Months 0
- Keyboarding Speed: [Text Field]
- Public Transportation: [Text Field]
- Required License, Certificate or Registration: [Text Field]
- Required Degree or Formal Training: [Text Field]

At the bottom, there is a toolbar with buttons: Save, Duplicate, Emp New Job, Correspond, Print, Emp Detail, Return to Search, Start Match, Comments, Tag.

## JOB DESCRIPTION TAB

The **Job Description** tab contains the specifics of the job. Compare the description to the customer talent bank. This tab should be used to compare the job order requirements to the customer's skills, work history, and qualifications.



The screenshot displays the OSOS interface for the 'Job Description' tab. 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, Job Order Detail (selected), and Links. The main content area shows 'AbilTo' as the employer, with Order#: DE0058544 and ID: NY010052875. A yellow arrow points to the 'Job Description' tab, which is highlighted. The description text reads: 'AbilTo is a venture capital-backed, high growth company in the technology-enabled healthcare field, and as such, there is potential for accelerated meritocratic individual growth, based on results. We are seeking a talented and experienced professional to lead the new sales effort, focusing on the BCBS plans, select employer groups and select national health plans. This position is focused on growing our business and adding new health plans to the portfolio of customers. The responsibilities include: 1. Management of the sales cycle from initial conversation to close, working collaboratively with the AbilTo leadership team 2. Expansion of current client relationships in partnership with the account management team 3. Negotiation of renewals and other commercial agreements 4. Development and management of the sales team including recruiting 5. Sales reporting in partnership with the CFO including revenue reconciliation 6. Effective management of customer on-boarding in partnership with the operations team and account management 1. Bachelor degree from an accredited institution in a related field. Masters level degree a desired plus. 2. Minimum seven years of account management experience in the healthcare industry, with proven knowledge of the business models and organization of health plans, payers and providers. 3. Proven record of sales goals attainment 4. Must be able to develop meaningful relationships, using them to further AbilTo's objectives. 5. Must be able to work in a high performance team environment, including coordinating different areas of both client and AbilTo. 6. Willingness to travel - approximately 40%. In addition to the technical requirements for this specific position, AbilTo seeks candidates who demonstrate: 1. Personal ownership of assignments and responsibilities 2. Ability to plan, execute, check results and improve on a continuing basis 3. Resilience and grit to ensure mission completion even in the face of adversity 4. Discipline and organization to manage multiple tasks'. A 'Spell Check' button is visible below the text. At the bottom, there are buttons for Save, Duplicate, Emp New Job, Correspond, Print, Emp Detail, Return to Search, Start Match, Comments, and Tag.

## MATCHES TAB

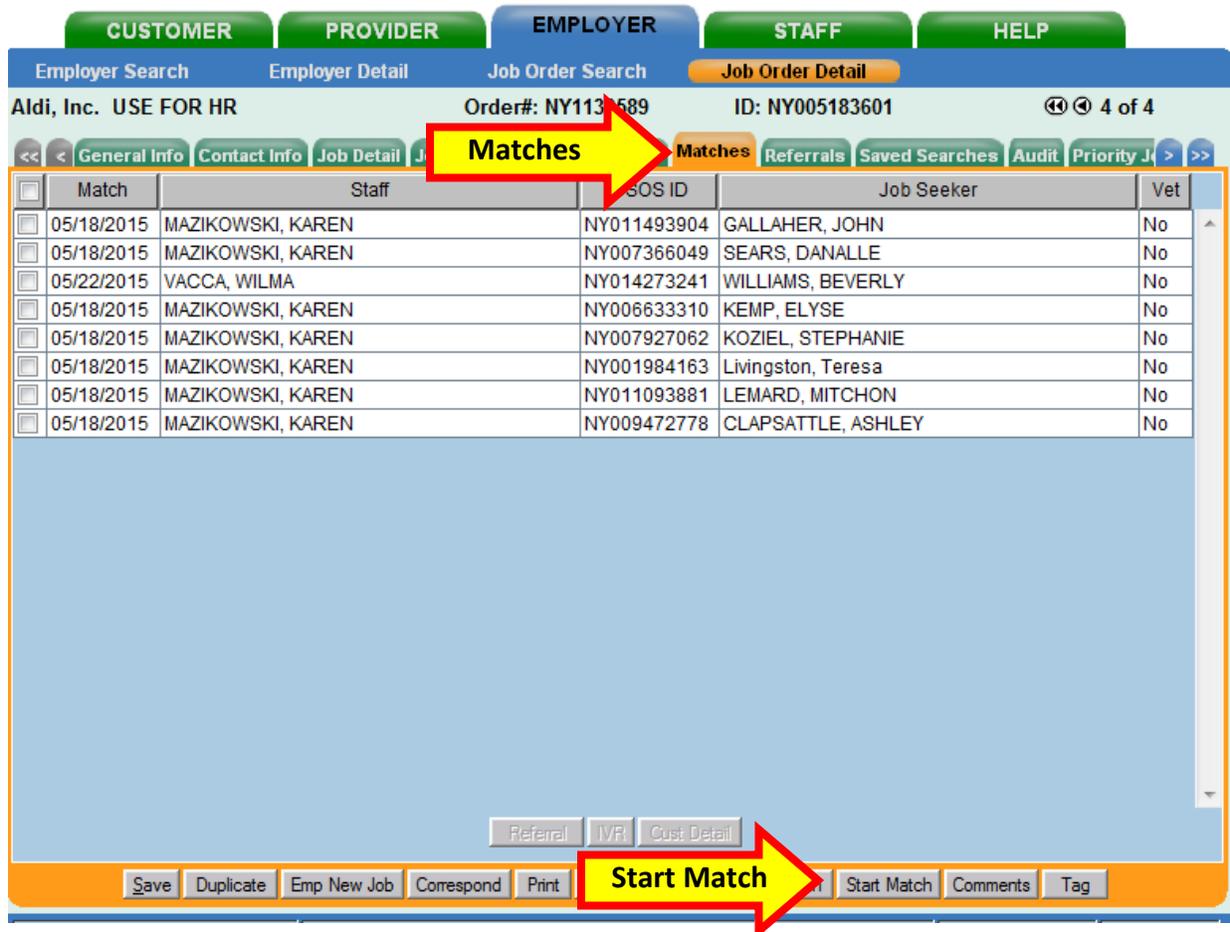
Look in the **Matches** tab. If matching has been completed by another staff member, the results will be displayed here. If matches were completed recently by another staff member, then new match results may be lower than usual.

Look at a few customer records to determine if matching can be expanded, for example by geographic region. If staff previously looked at one specific geographical location expand the search by looking in different geographic locations.

Click the **Start Match** button to start the job matching process.



As a best practice, staff should take in account their local labor market and customer talent pool. Reviewing the business jacket and job order details will help determine if additional matching is necessary.



Navigation: CUSTOMER PROVIDER **EMPLOYER** STAFF HELP

Breadcrumb: Employer Search Employer Detail Job Order Search **Job Order Detail**

Customer: Aldi, Inc. USE FOR HR Order#: NY113589 ID: NY005183601 4 of 4

Sub-tabs: General Info Contact Info Job Detail **Matches** Referrals Saved Searches Audit Priority J

Match	Staff	SOS ID	Job Seeker	Vet
<input type="checkbox"/> 05/18/2015	MAZIKOWSKI, KAREN	NY011493904	GALLAHER, JOHN	No
<input type="checkbox"/> 05/18/2015	MAZIKOWSKI, KAREN	NY007366049	SEARS, DANALLE	No
<input type="checkbox"/> 05/22/2015	VACCA, WILMA	NY014273241	WILLIAMS, BEVERLY	No
<input type="checkbox"/> 05/18/2015	MAZIKOWSKI, KAREN	NY006633310	KEMP, ELYSE	No
<input type="checkbox"/> 05/18/2015	MAZIKOWSKI, KAREN	NY007927062	KOZIEL, STEPHANIE	No
<input type="checkbox"/> 05/18/2015	MAZIKOWSKI, KAREN	NY001984163	Livingston, Teresa	No
<input type="checkbox"/> 05/18/2015	MAZIKOWSKI, KAREN	NY011093881	LEMARD, MITCHON	No
<input type="checkbox"/> 05/18/2015	MAZIKOWSKI, KAREN	NY009472778	CLAPSATTLE, ASHLEY	No

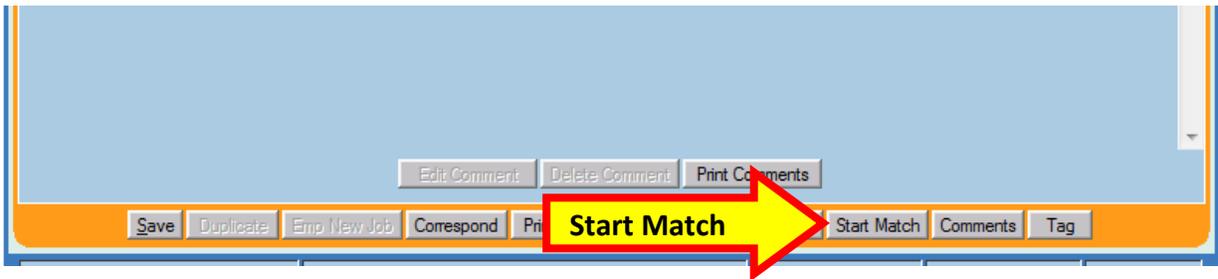
Buttons: Referral IVR Cust Detail Save Duplicate Emp New Job Correspond Print **Start Match** Start Match Comments Tag

## START MATCH

To search for customers whose skills and work history match the job order, click the **Start Match** button to start the job matching process. This will bring up the **Customer Search** window.



The **Start Match** button is available on all **Job Order Detail** window tabs.

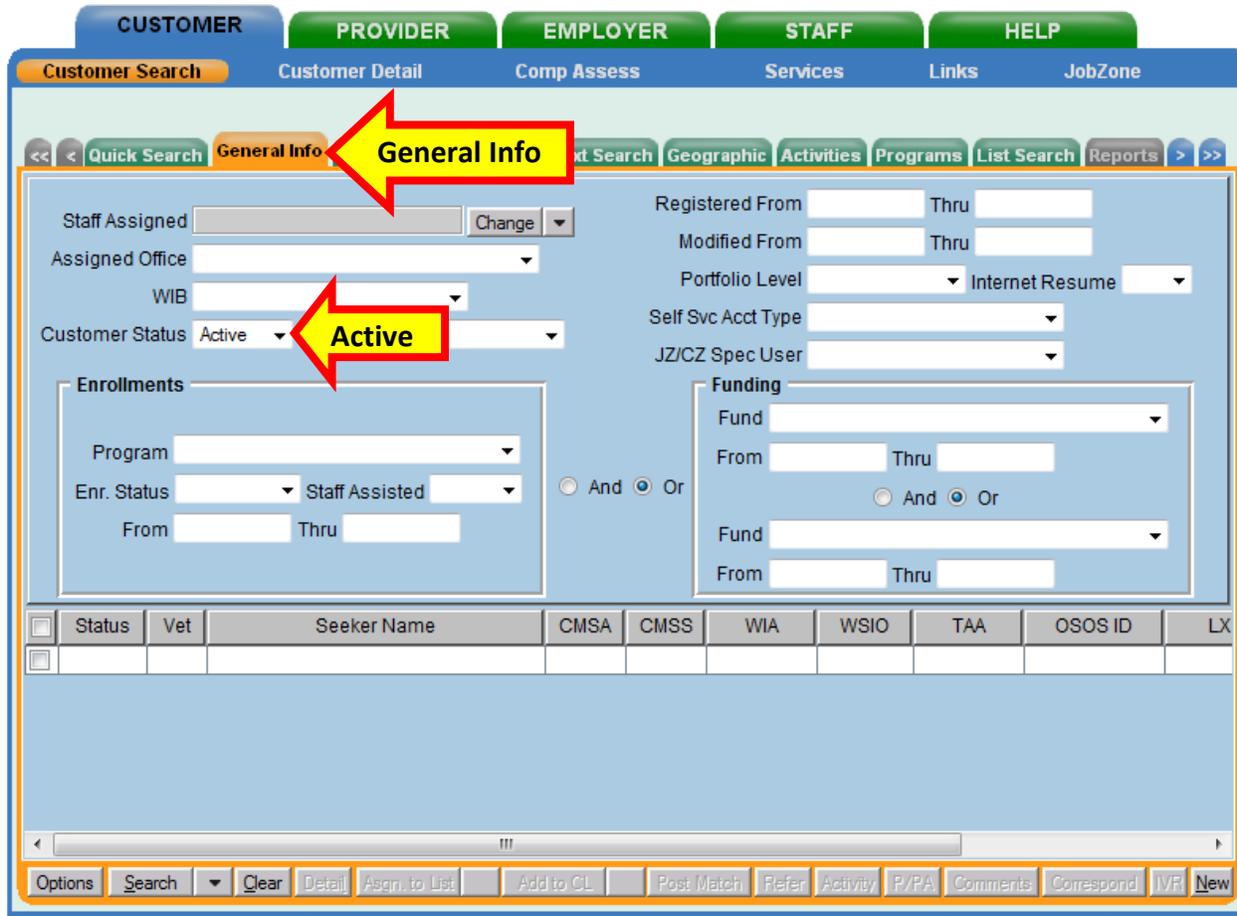


## CUSTOMER SEARCH - GENERAL INFO TAB

In the **General Info** tab input the desired search criteria. Make the **Customer Status** "Active".



Other fields may be used to narrow the search if results are too high.

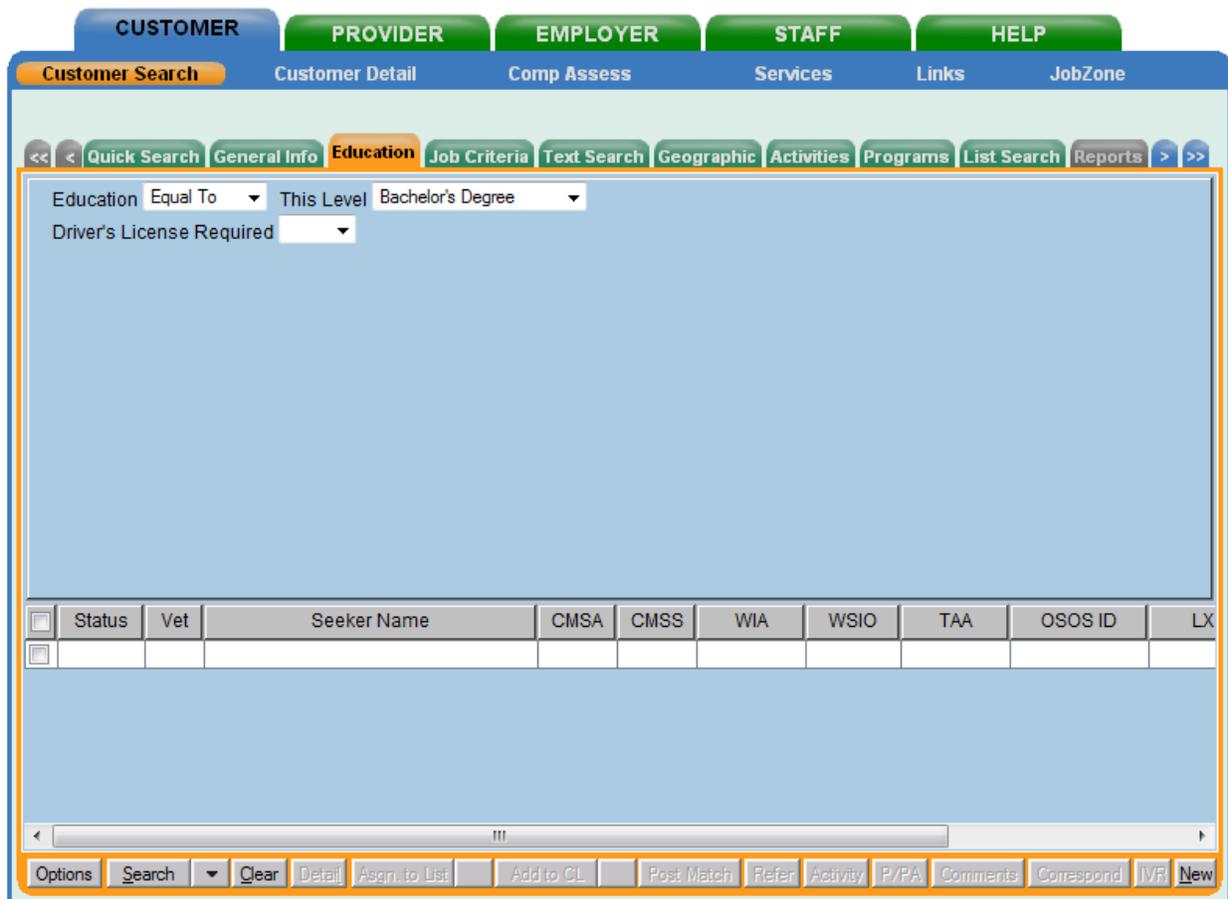


The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The 'General Info' tab is selected and highlighted with a red arrow. The form contains several sections: Staff Assigned (with a Change dropdown), Assigned Office, WIB, Customer Status (set to Active, highlighted with a red arrow), Enrollments (Program, Enr. Status, Staff Assisted, From, Thru), Registered From, Modified From, Portfolio Level, Internet Resume, Self Svc Acct Type, JZ/CZ Spec User, and Funding (Fund, From, Thru). Below the form is a table with columns: Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, and LX. At the bottom, there is a toolbar with buttons: Options, Search, Clear, Detail, Assign to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

## CUSTOMER SEARCH - EDUCATION TAB

When the education level is entered in the **Job Detail** tab of the job order, the data fields in the **Education** tab automatically populate from the job order.

If a job order does not have education information entered, but it is in the job description, enter the education information here. If the education level required by the business is “Less than High School” the field should be made blank. Any other entry should be left in.



The screenshot shows the OSOS Customer Search interface with the Education tab selected. The interface includes a top navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The Education tab is active, showing search criteria for Education (Equal To) and This Level (Bachelor's Degree). Below the search criteria is a table with columns for Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, and LX. The table is currently empty. At the bottom of the interface is a toolbar with buttons for Options, Search, Clear, Detail, Assign to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

## CUSTOMER SEARCH - JOB CRITERIA TAB

The **O\*Net Title** and code, **Work Week**, and **Duration** data fields will automatically populate. Select "Active" in the **Job Seeker Status** drop down field.

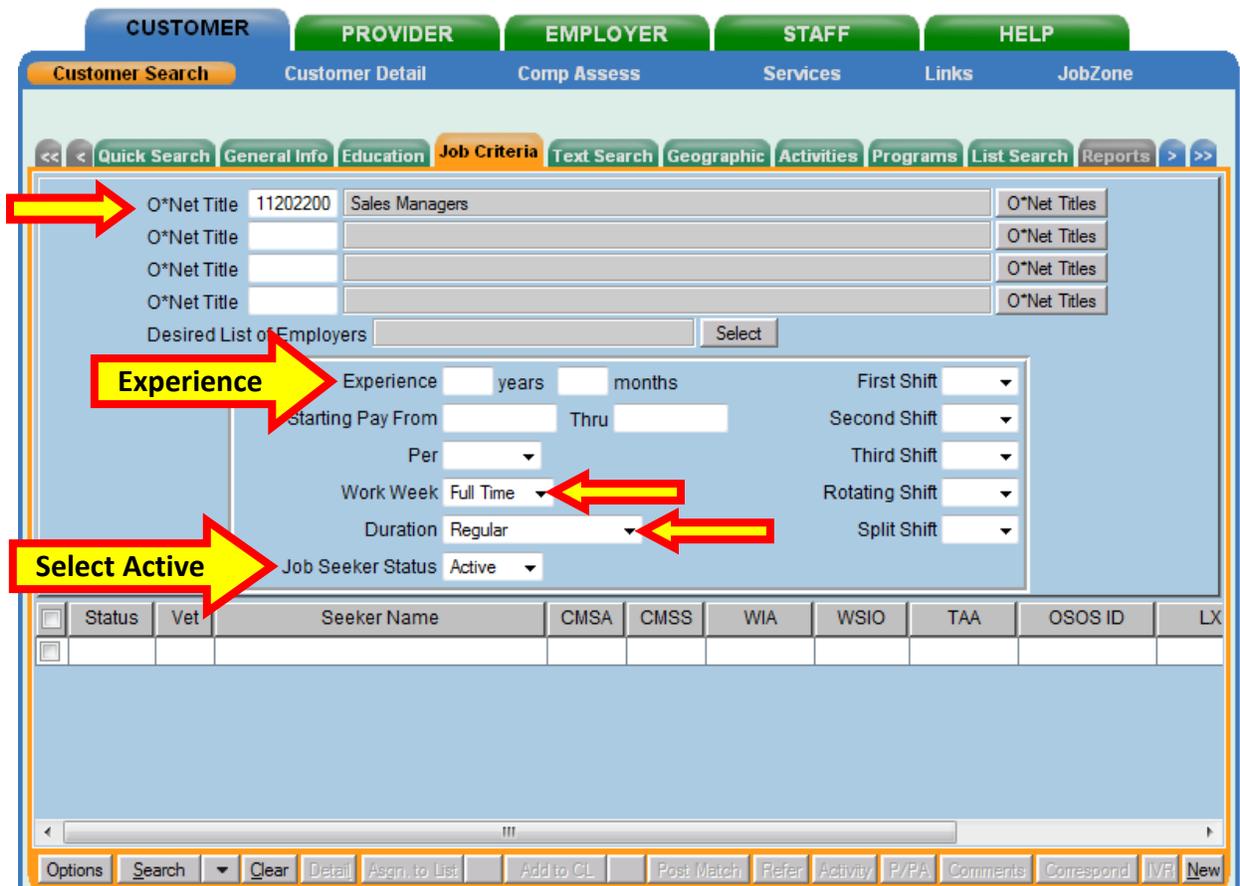


**Job Seeker Status** should always be "Active" to ensure that customers who are "Inactive" (back to work) do not receive any unwanted job matches.

Note: The four O\*Net Title search function will provide results that include any of the titles searched.



If the job order specifies experience as a minimum qualification, staff should complete the **Experience** data field to match the desired work experience.



The screenshot shows the OSOS Customer Search interface with the Job Criteria tab selected. Red arrows highlight the following fields:

- O\*Net Title:** The first field is populated with "11202200" and "Sales Managers".
- Experience:** The "Experience" field is set to "0" years and "0" months.
- Work Week:** The "Work Week" dropdown is set to "Full Time".
- Duration:** The "Duration" dropdown is set to "Regular".
- Job Seeker Status:** The "Job Seeker Status" dropdown is set to "Active".

At the bottom of the form, there is a table with columns: Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, LX. Below the table is a search bar and a row of buttons: Options, Search, Clear, Detail, Assign to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, New.

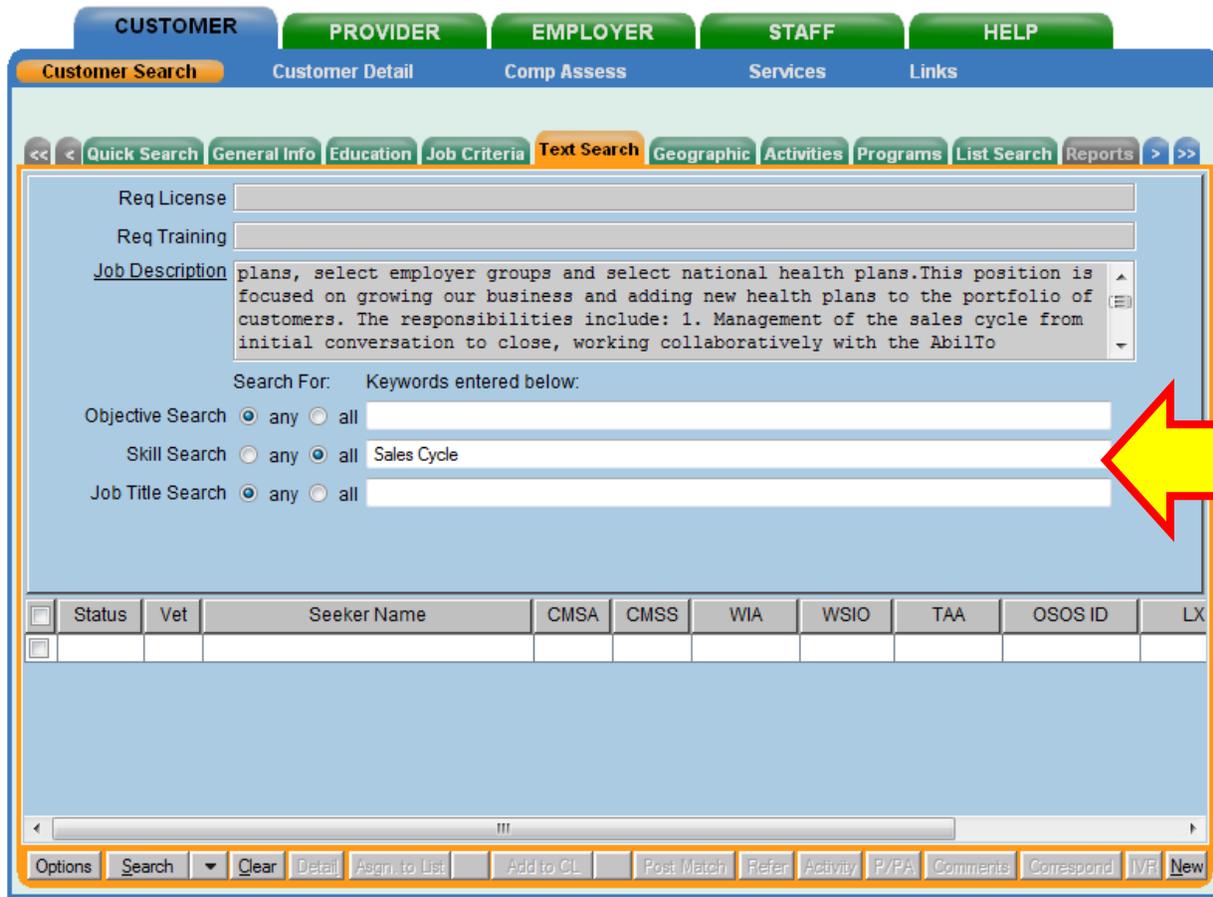
## CUSTOMER SEARCH - TEXT SEARCH TAB

In this section, customize the **Objective Search**, **Skill Search**, and/or **Job Title Search** data fields.

These fields are optional and should be used to filter the search results.



Use keywords from the **Job Description** to fill in these search options.



Customer Search

Customer Detail    Comp Assess    Services    Links

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

Req License

Req Training

Job Description plans, select employer groups and select national health plans. This position is focused on growing our business and adding new health plans to the portfolio of customers. The responsibilities include: 1. Management of the sales cycle from initial conversation to close, working collaboratively with the AbilTo

Search For:    Keywords entered below:

Objective Search     any     all   

Skill Search     any     all    Sales Cycle

Job Title Search     any     all   

<input type="checkbox"/>	Status	Vet	Seeker Name	CMSA	CMSS	WIA	WSIO	TAA	OSOS ID	LX
<input type="checkbox"/>										

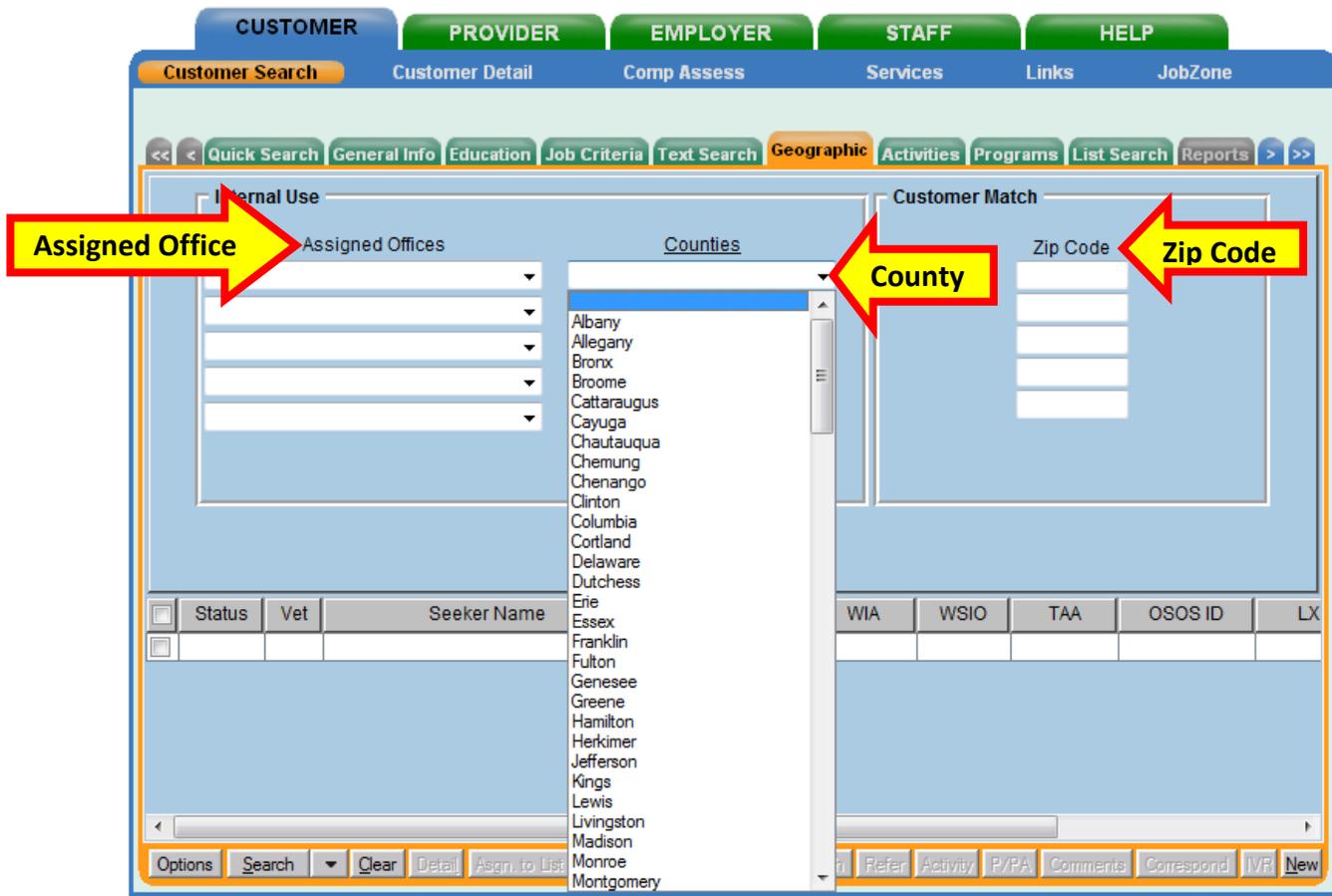
Options    Search    Clear    Detail    Assign to List    Add to CL    Post Match    Refer    Activity    P/PA    Comments    Correspond    IVR    New

## CUSTOMER SEARCH - GEOGRAPHIC TAB

If a WIB was not entered in the **General Info** tab, a county should be added. **Assigned Offices** may be used if the goal is to find a job seeker registered with that office.

When matching for a recruitment, then matching by county will yield the best results (depending upon location).

Searching by **Zip Code** is most effective when seeking results for a specific geographic target.



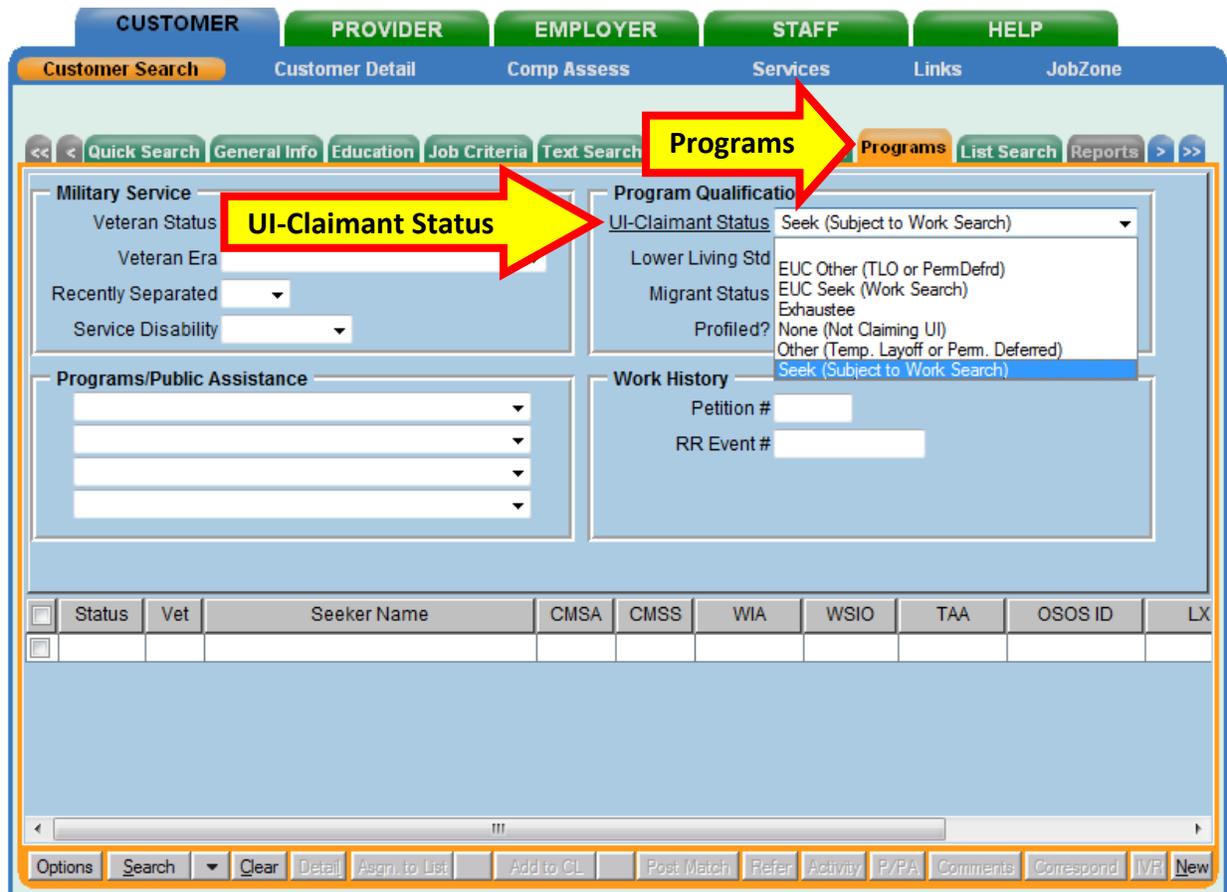
The screenshot displays the OSOS Customer Search interface, specifically the Geographic tab. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, there are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The main search area has a 'Geographic' tab selected, with other options like Quick Search, General Info, Education, Job Criteria, Text Search, Activities, Programs, List Search, and Reports. The search form is divided into two main sections: 'Internal Use' and 'Customer Match'. The 'Internal Use' section has a dropdown for 'Assigned Offices' (indicated by a red arrow) and a list of counties (indicated by a red arrow). The 'Customer Match' section has a 'Zip Code' field (indicated by a red arrow). Below the search form, there are columns for 'Status', 'Vet', 'Seeker Name', 'WIA', 'WSIO', 'TAA', 'OSOS ID', and 'LX'. At the bottom, there are buttons for 'Options', 'Search', 'Clear', 'Detail', 'Assign to List', 'Refer', 'Activity', 'P/PA', 'Comments', 'Correspond', 'IVR', and 'New'.

## CUSTOMER SEARCH – PROGRAMS TAB

In the **Programs** tab under **Program Qualifications** make the **UI-Claimant Status** "Seek (Subject to Work Search)" if the desired result is for UI customers only. If the desired result is for both UI and non-UI customers, leave this field blank.



This field can be edited and/or left blank depending on the desired population.



The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The Programs tab is selected and highlighted with a yellow arrow. The main content area is divided into several sections:

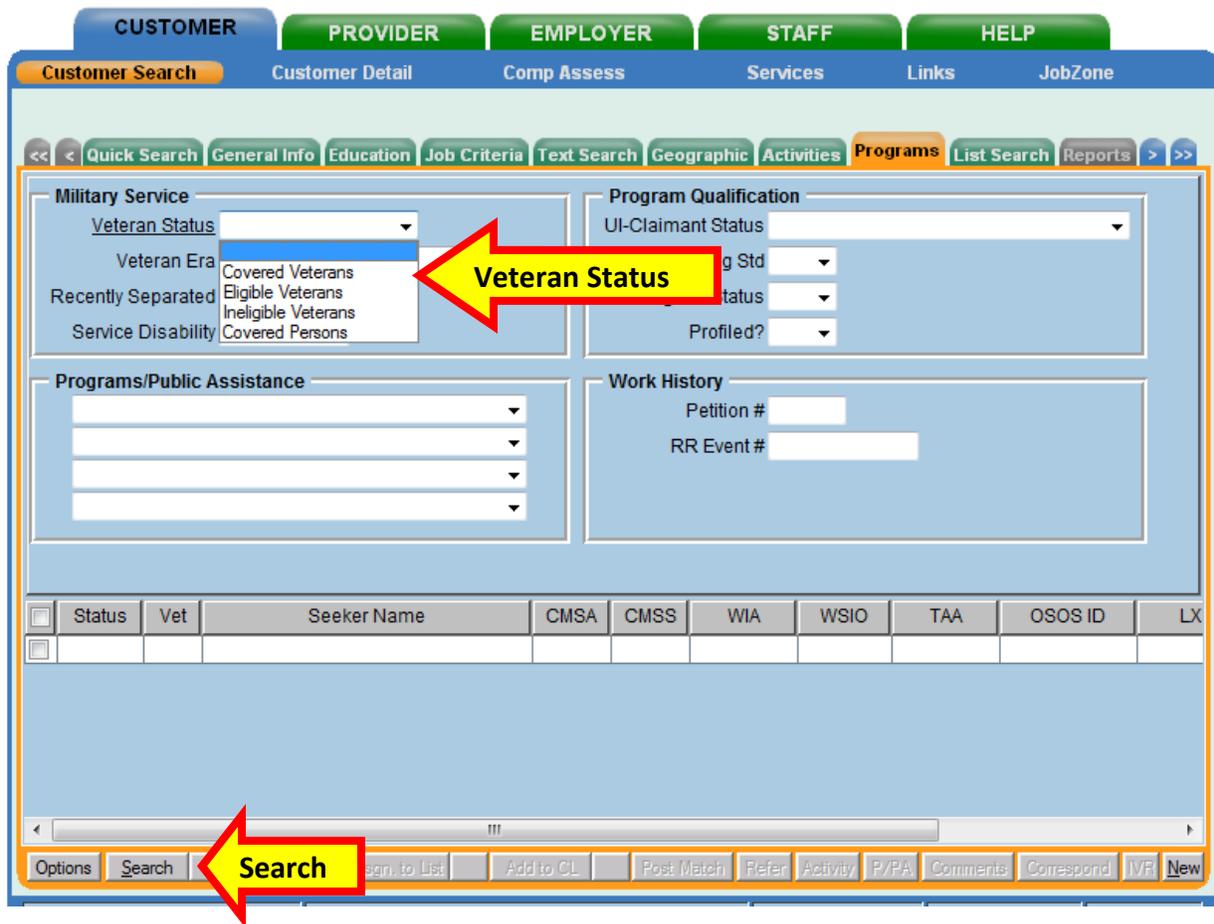
- Military Service:** Includes fields for Veteran Status, Veteran Era, Recently Separated (dropdown), and Service Disability (dropdown).
- Programs/Public Assistance:** A section with multiple dropdown menus.
- Program Qualification:** This section contains the **UI-Claimant Status** dropdown, which is highlighted with a yellow arrow and set to "Seek (Subject to Work Search)". Other options in the dropdown include EUC Other (TLO or PermDefrd), EUC Seek (Work Search), Exhaustee, None (Not Claiming UI), Other (Temp. Layoff or Perm. Deferred), and Seek (Subject to Work Search).
- Work History:** Includes fields for Petition # and RR Event #.

At the bottom of the interface is a table with columns: Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, and LX. Below the table is a search bar and a row of action buttons: Options, Search, Clear, Detail, Asgn. to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

In the **Military Service** section select a **Veteran Status** to match veteran customers. Selecting "Covered Veterans", "Eligible Veterans", or "Covered Persons" will result in these customers being displayed in the results panel.

If a **Veteran Status** is not selected the veteran status will still be indicated in the search results with a "Yes" in the column labeled **Vet**.

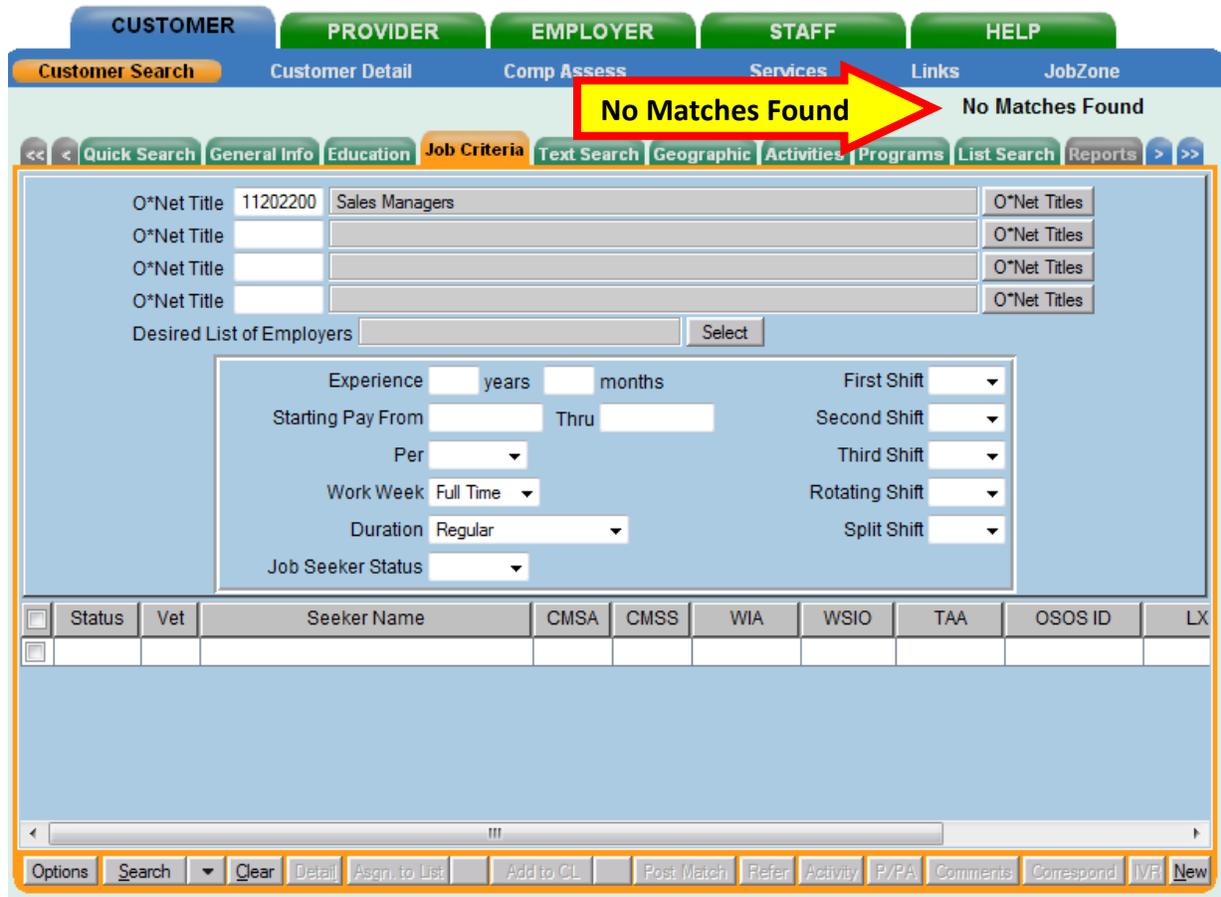
After entering all search criteria click the **Search** button.



The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The main search area includes several sections: Military Service, Program Qualification, Programs/Public Assistance, and Work History. The Military Service section has a dropdown menu for Veteran Status, which is currently open, showing options: Covered Veterans, Eligible Veterans, Ineligible Veterans, and Covered Persons. A red arrow points to this menu with the text "Veteran Status". The Program Qualification section includes fields for UI-Claimant Status, Reg Std, Status, and Profiled?. The Programs/Public Assistance section has three dropdown menus. The Work History section has fields for Petition # and RR Event #. Below the search criteria is a table with columns: Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, and LX. At the bottom, there is a search bar and a row of buttons: Options, Search, Sign to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New. A red arrow points to the Search button.

### CUSTOMER SEARCH RESULTS: NO MATCHES

If a search results in "No Matches Found", the search criteria should be changed.



The screenshot displays the OSOS Customer Search interface. At the top, there are navigation tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The main search area is titled "No Matches Found" and includes a search bar with "O\*Net Title" set to "11202200" and "Sales Managers". A yellow arrow points to the "No Matches Found" text. The search criteria section includes fields for Experience (years and months), Starting Pay From, Per, Work Week (Full Time), Duration (Regular), Job Seeker Status, and shift options (First, Second, Third, Rotating, Split). Below the search criteria is a table with columns: Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, and LX. The table is currently empty. At the bottom, there are buttons for Options, Search, Clear, Detail, Assign to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

## REMOVING THE O\*NET TITLE

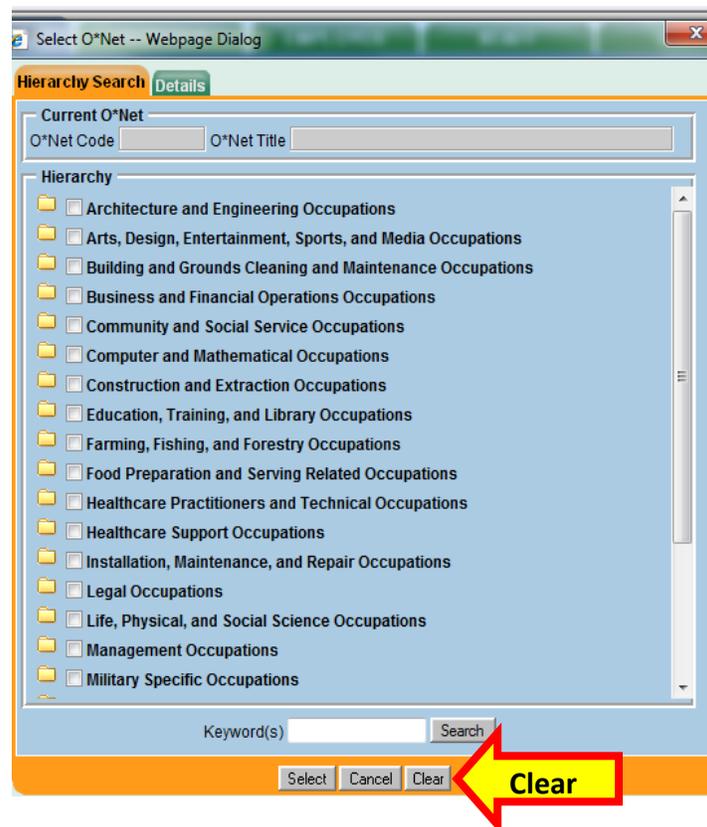
If no matches are found there are several options to improve the results.

One option is to remove the O\*Net Title.

To remove the O\*Net Title go to the **Job Criteria** tab, click on **O\*Net Titles**. The O\*Net dialog box will appear. Click the **Clear** button.



Note: The O\*Net Title was cleared by bringing up the O\*Net dialog box and not by using the **Clear** button at the bottom of the screen. **Do not** use the **Clear** button at the bottom of the screen.



## TEXT SEARCH TAB

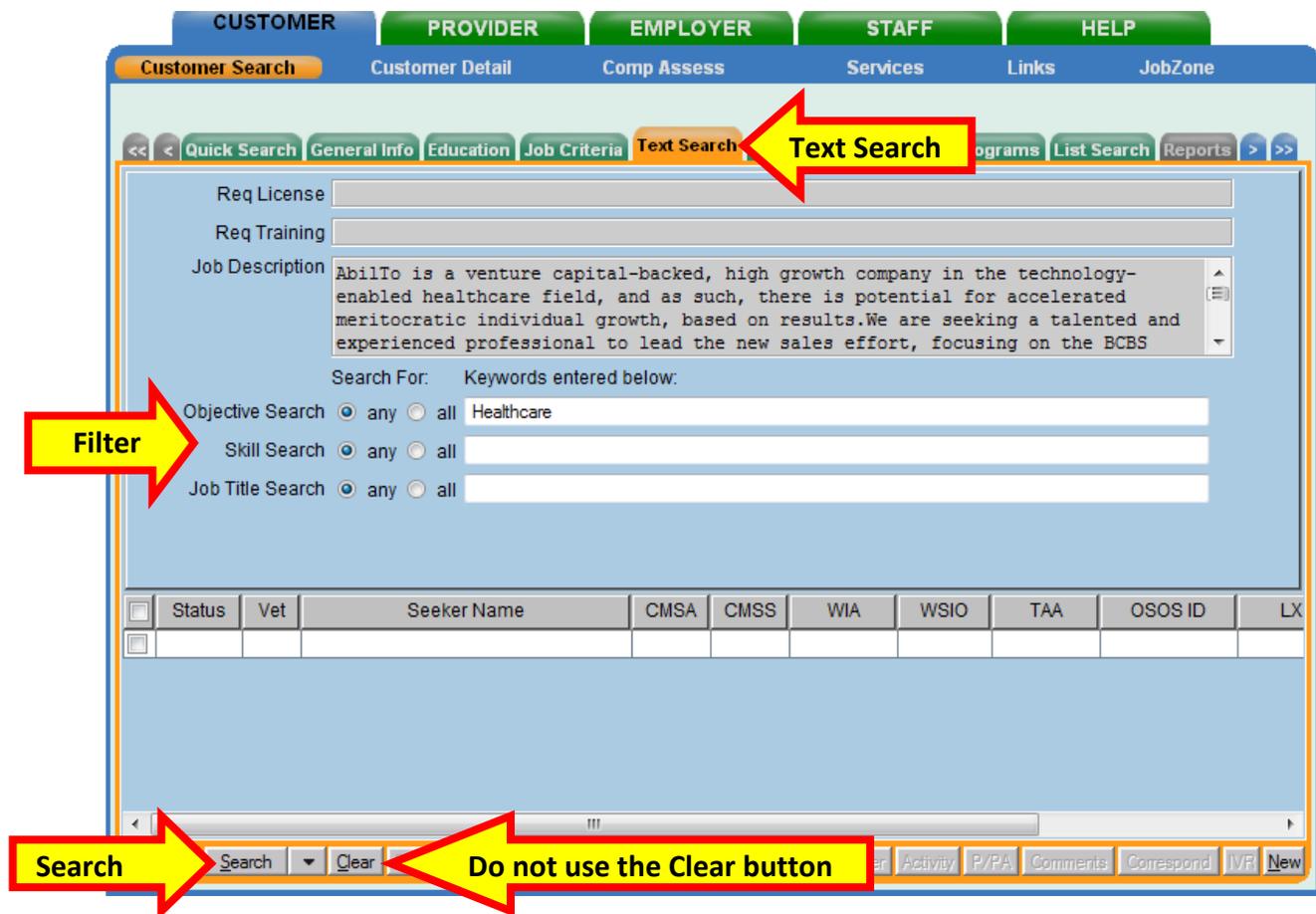
After the O\*Net Title is removed, search within the **Text Search** tab.

In the **Text Search** tab, you can search by **Objective**, **Skill**, or **Job Title**.



The **Job Description** is automatically carried into this tab. Scroll through the **Job Description** to identify keywords.

Use the search fields to filter the results. Click the **Search** button at the bottom of the screen to view the results.



The screenshot shows the OSOS interface with the **Text Search** tab selected. The interface includes a navigation bar with tabs for **CUSTOMER**, **PROVIDER**, **EMPLOYER**, **STAFF**, and **HELP**. Below this is a sub-navigation bar with **Customer Search**, **Customer Detail**, **Comp Assess**, **Services**, **Links**, and **JobZone**. The **Text Search** tab is highlighted in the sub-navigation bar. The main content area contains search fields for **Req License**, **Req Training**, and **Job Description**. The **Job Description** field contains the text: "AbilTo is a venture capital-backed, high growth company in the technology-enabled healthcare field, and as such, there is potential for accelerated meritocratic individual growth, based on results. We are seeking a talented and experienced professional to lead the new sales effort, focusing on the BCBS". Below the search fields are three search filters: **Objective Search**, **Skill Search**, and **Job Title Search**. Each filter has radio buttons for **any** and **all**, and a text input field. The **Objective Search** field contains the text "Healthcare". At the bottom of the interface is a **Search** button and a **Clear** button. A table with columns for **Status**, **Vet**, **Seeker Name**, **CMSA**, **CMSS**, **WIA**, **WSIO**, **TAA**, **OSOS ID**, and **LX** is visible below the search filters. Annotations include a red arrow pointing to the **Text Search** tab, a yellow arrow pointing to the **Filter** section, a red arrow pointing to the **Search** button, and a yellow arrow pointing to the **Clear** button with the text "Do not use the Clear button".

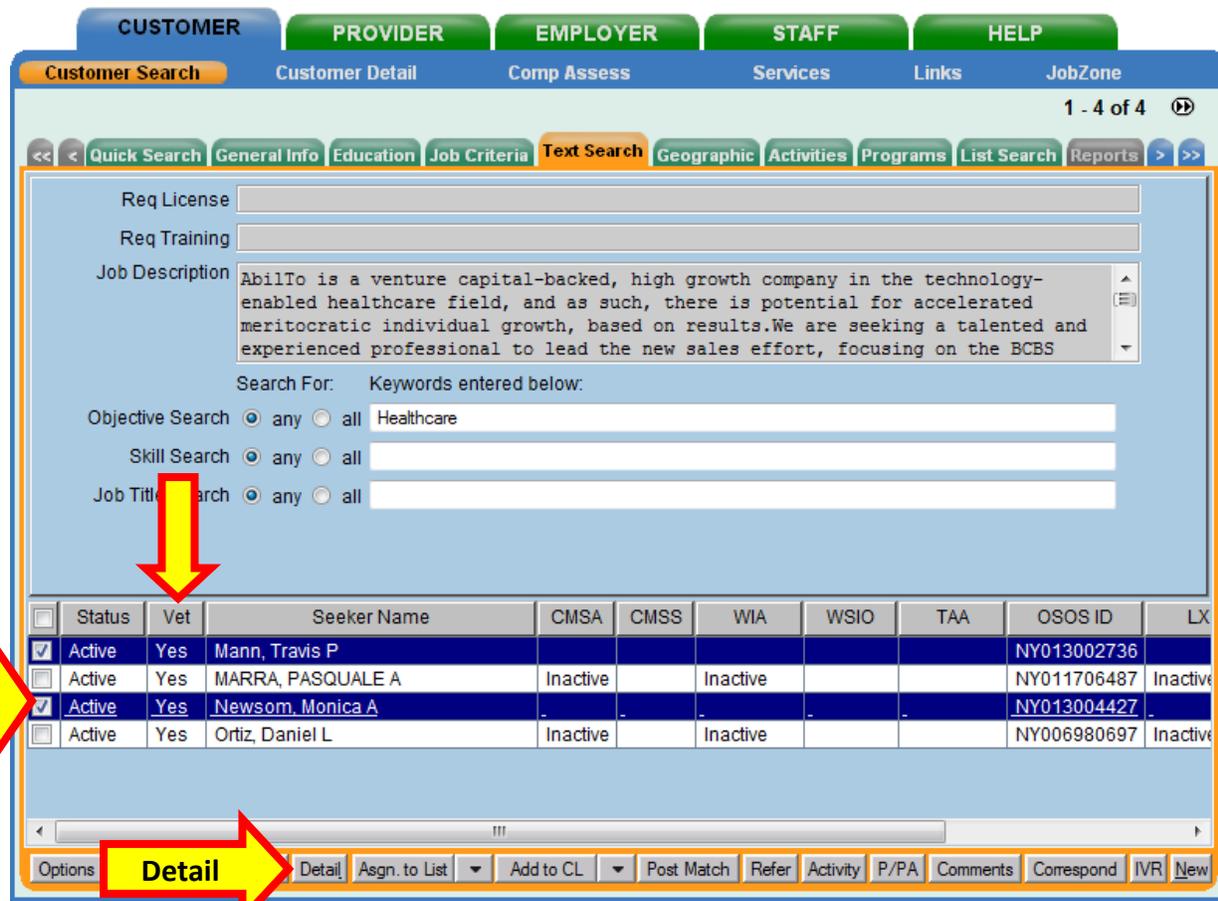
## CUSTOMER SEARCH RESULTS

The potential matches will show at the bottom of the **Customer Search** window.

Any veteran customers matched to the job order appear in the **Vet** column reading "Yes". Sorting for veterans can be done by clicking **Vet** in the title bar. These customers would have been isolated if **Veteran Status** was selected in the **Programs** tab.

Highlight the customer records to review by checking the white check box in the first column. Or highlight all the records by clicking on the check box in the grey title bar.

After selecting the customers, click the **Detail** button. This will place the highlighted customers in the **Customer Detail Window**.



The screenshot shows the OSOS Customer Search window. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search (selected), Customer Detail, Comp Assess, Services, Links, and JobZone. A search bar shows '1 - 4 of 4' results. The search criteria include Req License, Req Training, and Job Description. The Job Description text reads: 'AbilTo is a venture capital-backed, high growth company in the technology-enabled healthcare field, and as such, there is potential for accelerated meritocratic individual growth, based on results. We are seeking a talented and experienced professional to lead the new sales effort, focusing on the BCBS'. Search filters for Objective Search, Skill Search, and Job Title Search are set to 'any' with 'Healthcare' entered in the Objective Search field. Below the search filters is a table of search results:

<input type="checkbox"/>	Status	Vet	Seeker Name	CMSA	CMSS	WIA	WSIO	TAA	OSOS ID	LX
<input checked="" type="checkbox"/>	Active	Yes	Mann, Travis P						NY013002736	
<input type="checkbox"/>	Active	Yes	MARRA, PASQUALE A	Inactive		Inactive			NY011706487	Inactive
<input checked="" type="checkbox"/>	Active	Yes	Newsom, Monica A						NY013004427	
<input type="checkbox"/>	Active	Yes	Ortiz, Daniel L	Inactive		Inactive			NY006980697	Inactive

At the bottom of the window, there is an 'Options' menu with a 'Detail' button highlighted by a yellow arrow. Other buttons include 'Asgn. to List', 'Add to CL', 'Post Match', 'Refer', 'Activity', 'P/PA', 'Comments', 'Correspond', 'IVR', and 'New'.

## NAVIGATING BETWEEN THE CUSTOMER AND EMPLOYER MODULES

Navigate between the **Customer Module** and **Employer Module** in the Match Mode Process to compare the job order information with the customer information.



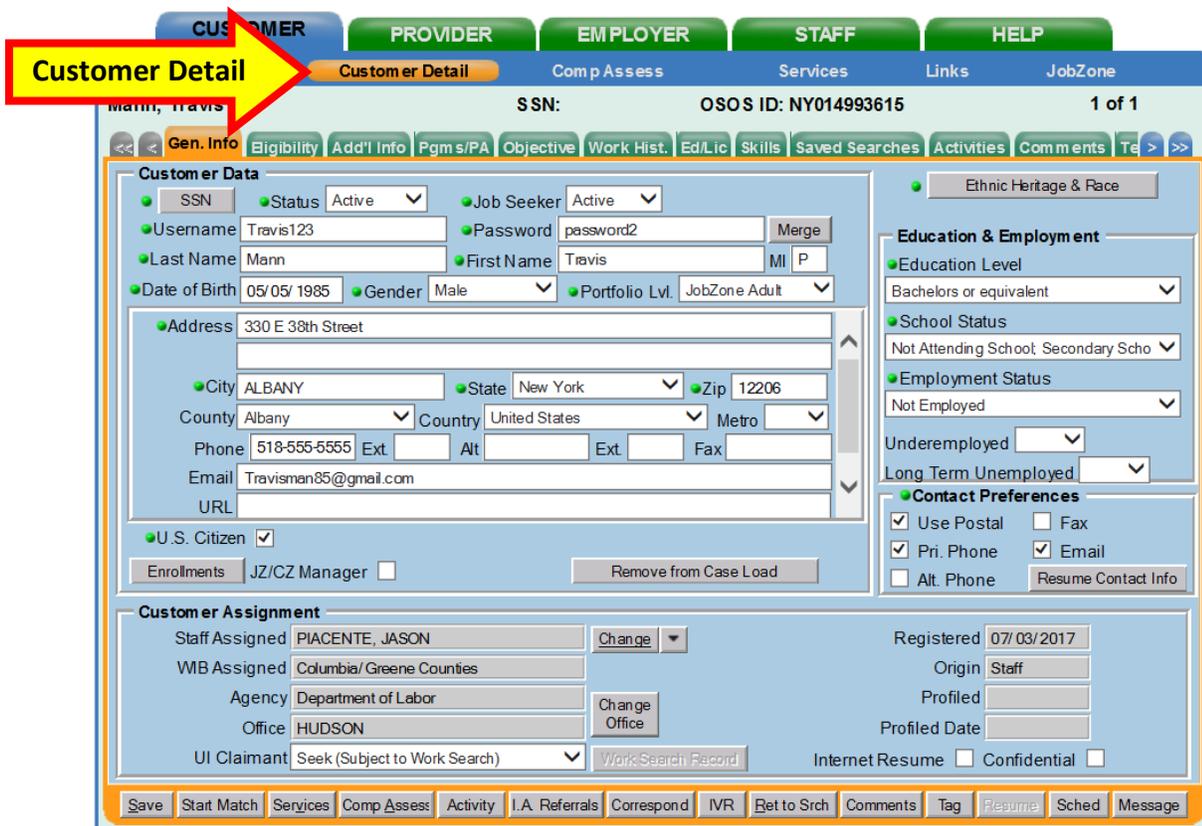
As a best practice, print the job order to reference and highlight the requirements of the position for easy comparison.



## REVIEWING POSSIBLE MATCHES

To ensure quality job matching, staff are required to compare specific information between open job orders and customer records. When reviewing the customer record items such as objective, work history, skill/abilities, education/licenses, and the **Comments** tab of OSOS need to be reviewed to confirm a good match with the business' needs/requirements.

Tab through the **Add'l Info**, **Objective**, **Work History**, **Ed/Lic**, **Skills**, and **Comments** tabs to review the customer's record.



**Customer Detail**

SSN: OSOS ID: NY014993615 1 of 1

Gen. Info | Eligibility | Add'l Info | Pgm s/PA | Objective | Work Hist. | Ed/Lic | Skills | Saved Searches | Activities | Comments | Te | >>

**Customer Data**

- SSN: [ ] Status: Active Job Seeker: Active
- Username: Travis123 Password: password2 Merge
- Last Name: Mann First Name: Travis MI P
- Date of Birth: 05/05/1985 Gender: Male Portfolio Lvl: JobZone Adult
- Address: 330 E 38th Street
- City: ALBANY State: New York Zip: 12206
- County: Albany Country: United States Metro: [ ]
- Phone: 518-555-5555 Ext: [ ] Alt: [ ] Ext: [ ] Fax: [ ]
- Email: Travidman85@gmail.com
- URL: [ ]
- U.S. Citizen:
- Enrollments: JZ/CZ Manager  Remove from Case Load

**Education & Employment**

- Education Level: Bachelors or equivalent
- School Status: Not Attending School Secondary Scho
- Employment Status: Not Employed
- Underemployed: [ ]
- Long Term Unemployed: [ ]
- Contact Preferences:
  - Use Postal  Fax
  - Pri. Phone  Email
  - Alt. Phone Resume Contact Info

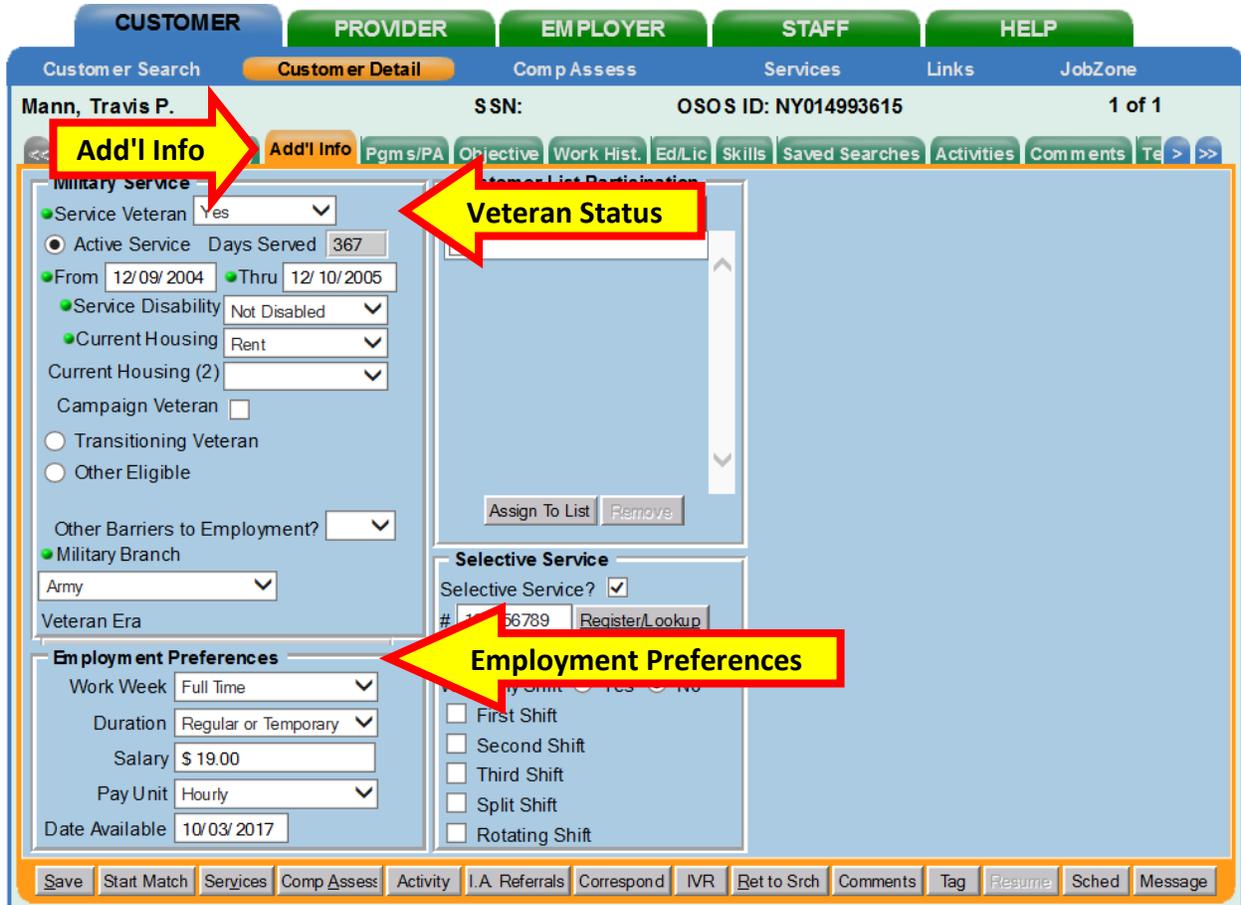
**Customer Assignment**

- Staff Assigned: PIACENTE, JASON Change
- WB Assigned: Columbia/ Greene Counties
- Agency: Department of Labor Change Office
- Office: HUDSON
- UI Claimant: Seek (Subject to Work Search) Work Search Record
- Registered: 07/03/2017
- Origin: Staff
- Profiled: [ ]
- Profiled Date: [ ]
- Internet Resume:  Confidential:

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

## ADD'L INFO TAB

View the **Add'l Info** tab to review the customer's **Employment Preferences** and veteran status.



**CUSTOMER** | PROVIDER | EMPLOYER | STAFF | HELP

Customer Search | **Customer Detail** | Comp Assess | Services | Links | JobZone

Mann, Travis P. | SSN: | OSOS ID: NY014993615 | 1 of 1

<< **Add'l Info** Pgm s/PA Objective Work Hist. Ed/Lic Skills Saved Searches Activities Comments Te >>

**Military Service**

- Service Veteran Yes
- Active Service Days Served 367
- From 12/09/2004 Thru 12/10/2005
- Service Disability Not Disabled
- Current Housing Rent
- Current Housing (2)
- Campaign Veteran
- Transitioning Veteran
- Other Eligible
- Other Barriers to Employment?
- Military Branch Army
- Veteran Era

**Selective Service**

- Selective Service?
- # 56789 Register/Lookup
- First Shift
- Second Shift
- Third Shift
- Split Shift
- Rotating Shift

**Employment Preferences**

- Work Week Full Time
- Duration Regular or Temporary
- Salary \$ 19.00
- Pay Unit Hourly
- Date Available 10/03/2017

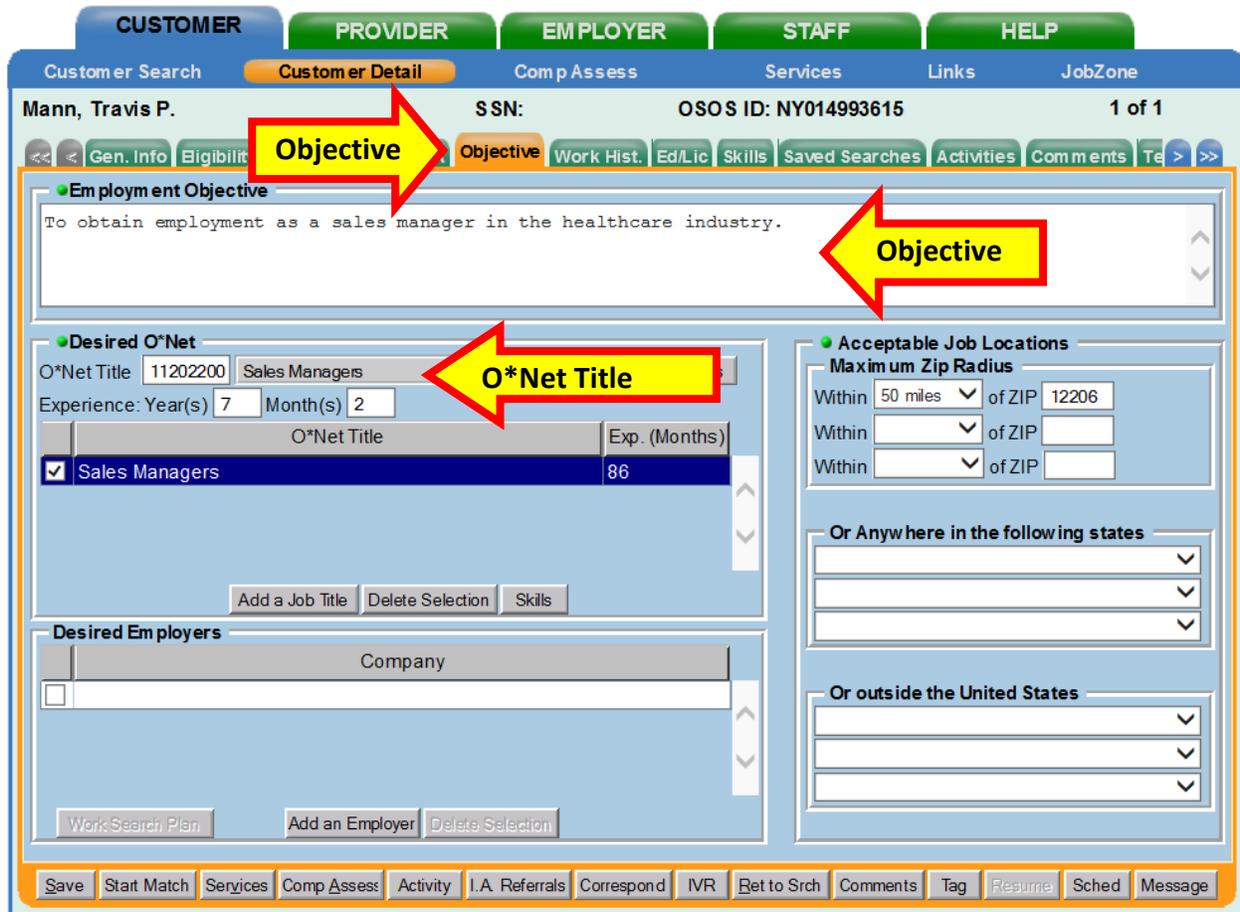
Assign To List Remove

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

## OBJECTIVE TAB

Within the **Objective** tab, review the customer's **Desired O\*Net Title** and **Employment Objective**.

The customer's **Employment Objective** will most likely be related to their past work history. Compare the two when reviewing the customer's record.



The screenshot displays the OSOS system interface for a customer record. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this, a secondary navigation bar shows options like Customer Search, Customer Detail (selected), Comp Assess, Services, Links, and JobZone. The main content area is for customer 'Mann, Travis P.' with SSN and OSOS ID. The 'Objective' tab is active, showing an 'Employment Objective' text field and a 'Desired O\*Net' section with a table of job titles and experience. A 'Maximum Zip Radius' section and a 'Desired Employers' list are also visible. Red arrows point to the 'Objective' tab, the 'Employment Objective' text, and the 'Desired O\*Net' table.

O*Net Title	Exp. (Months)
<input checked="" type="checkbox"/> Sales Managers	86

## WORK HISTORY TAB

When reviewing the **Work History** tab, review the information to determine if the customer's employment objective is appropriate based on their work history.

[CUSTOMER](#) [PROVIDER](#) [EMPLOYER](#) [STAFF](#) [HELP](#)

[Customer Search](#) [Customer Detail](#) [Comp Assess](#) [Services](#) [Links](#) [JobZone](#)

Mann, Travis P.      SN:      OSOS ID: NY014993615      1 of 1

[Gen. Info](#) [Eligibility](#) [Ac](#) **Work History** [Work Hist.](#) [Ed/Lic](#) [Skills](#) [Saved Searches](#) [Activities](#) [Comments](#) [Te](#) >>

**Detail**

Job Title: Sales Managers      O\*Net Titles      O\*Net Code: 11202200  
 Employer: Healthcare Corp.      Include online       Start Date: 07/01/2014      End Date: 09/24/2047  
 Address: 100 32nd Street      Supervisor:      Phone:      Ext.:  
 City: ALBANY      Wage: \$ 33.00      Hourly      Hours/week: 40  
 State: New York      Zip:      Reason for Leaving: Lack of work  
 Country: United States      Job: Developing new sales plans, managing associates  
 Job Type: Full Time      Duties:      RR Event#:      Event:  
 NAICS:      NAICS Lookup      Individual w/Disability

Job	Company	City	Start	End
<input type="checkbox"/> Sales Managers	Healthcare Corp.	ALBANY	07/01/2014	09/24/2047

[New Job Entry](#) [Delete Selection](#)

[Save](#) [Start Match](#) [Services](#) [Comp Assess](#) [Activity](#) [I.A. Referrals](#) [Correspond](#) [IVR](#) [Ret to Srch](#) [Comments](#) [Tag](#) [Resume](#) [Schd](#) [Message](#)

## EDUCATION/LICENSE TAB

If the job order requires a certain license, certificate, or degree, check the **Education/License** tab to review the customer's credentials.

**CUSTOMER**   **PROVIDER**   **EMPLOYER**   **STAFF**   **HELP**

Customer Search   **Customer Detail**   Comp Assess   Services   Links   JobZone

Mann, Travis P.   SSN:   OSOS ID: NY014993615   1 of 1

Gen. Info   Eligibility   Add'l Info   Pgm s/PA   Objective   Work Hist.   **Ed/Lic**   Activities   Comments   Te >>

**Driver License**

Yes    No    Class: Class D (Operator)   State: New York

Pass Transport    Hazardous Materials    Tank Vehicle    Motorcycle  
 School Bus    Doubles/Triples    Tank Hazard    Air Brakes

**Certificates / Licenses**

	Certificate/License	Issue Date	Issuing Organization	State	Country
<input type="checkbox"/>					

No Information Provided   Add Cert/Lic   Edit Cert/Lic   Delete Selection

**Schools**

	Course of Study	Degree	Completed	Issuing Institution	State	Country
<input type="checkbox"/>	Business Management	Bachelors		SUNY Albany	New York	United States

Add School   Edit School   Delete Selection

**Professional Associations**

	Association Name	Position	Description	Date Received
<input type="checkbox"/>				

No Information Provided   Add Association   Edit Association   Delete Selection

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

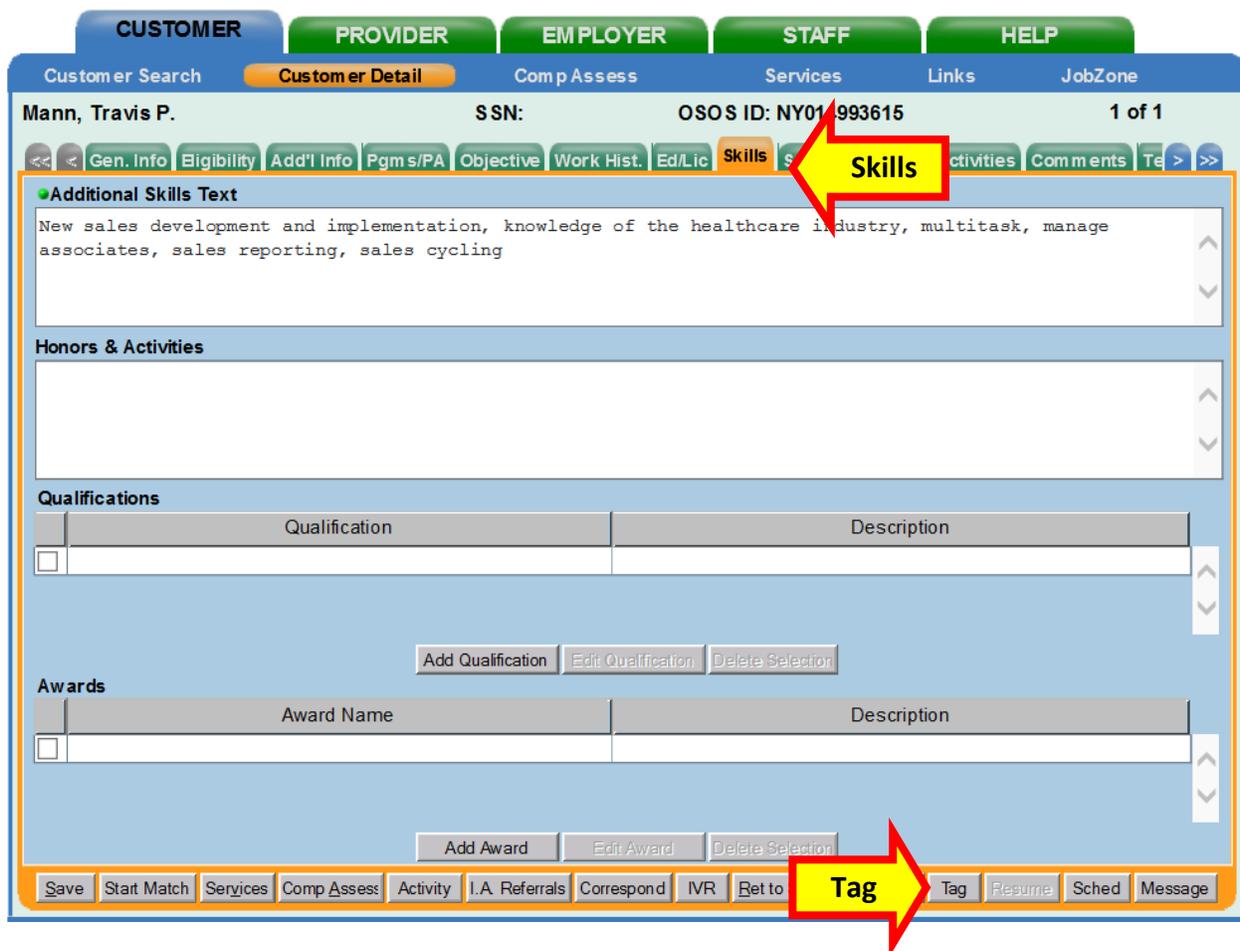
## SKILLS TAB

Review the **Skills** tab to determine if the customer's skills are relevant to the job order.

**Tag** the customer record for future reference after reviewing both the customer record and the job order to identify that the customer meets the job opening requirements. The **Tag** button is located on the bottom of the screen.



As a best practice, **Tag** the records while toggling through them.



The screenshot shows the OSOS Customer Detail page for Travis P. Mann. The Skills tab is selected and highlighted with a red arrow. The Skills section contains the following text:

**Additional Skills Text**  
New sales development and implementation, knowledge of the healthcare industry, multitask, manage associates, sales reporting, sales cycling

**Honors & Activities**

**Qualifications**

Qualification	Description
<input type="checkbox"/>	

Buttons: Add Qualification, Edit Qualification, Delete Selection

**Awards**

Award Name	Description
<input type="checkbox"/>	

Buttons: Add Award, Edit Award, Delete Selection

At the bottom of the page, the **Tag** button is highlighted with a red arrow. Other buttons include Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to, Resume, Sched, and Message.

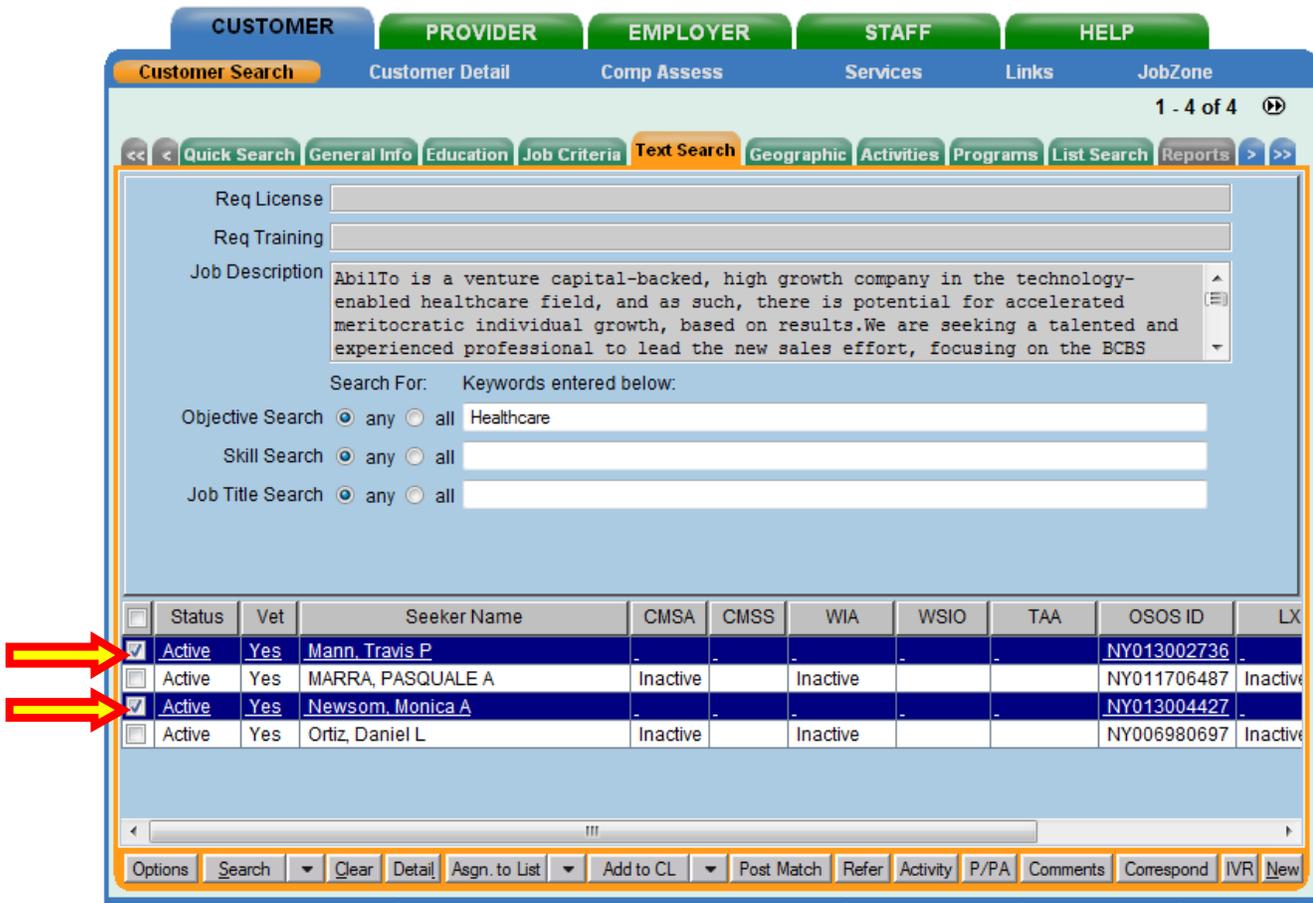
## RETURN TO SEARCH LISTING

After all the selected customer records have been reviewed in the **Customer Detail** window, click the **Return to Search** button at the bottom of the screen.

This button will be active on all **Customer Detail** screens during the match process.



The customer records that were tagged will be highlighted.



A screenshot of the OSOS Customer Search interface. The 'Text Search' tab is selected. The search results table shows four records. The first and third records are highlighted in blue, indicating they are tagged. Two red arrows point to the checkboxes in the first and third rows of the table.

	Status	Vet	Seeker Name	CMSA	CMSS	WIA	WSIO	TAA	OSOS ID	LX
<input checked="" type="checkbox"/>	Active	Yes	<a href="#">Mann, Travis P</a>	-	-	-	-	-	NY013002736	-
<input type="checkbox"/>	Active	Yes	MARRA, PASQUALE A	Inactive	-	Inactive	-	-	NY011706487	Inactive
<input checked="" type="checkbox"/>	Active	Yes	<a href="#">Newsom, Monica A</a>	-	-	-	-	-	NY013004427	-
<input type="checkbox"/>	Active	Yes	Ortiz, Daniel L	Inactive	-	Inactive	-	-	NY006980697	Inactive

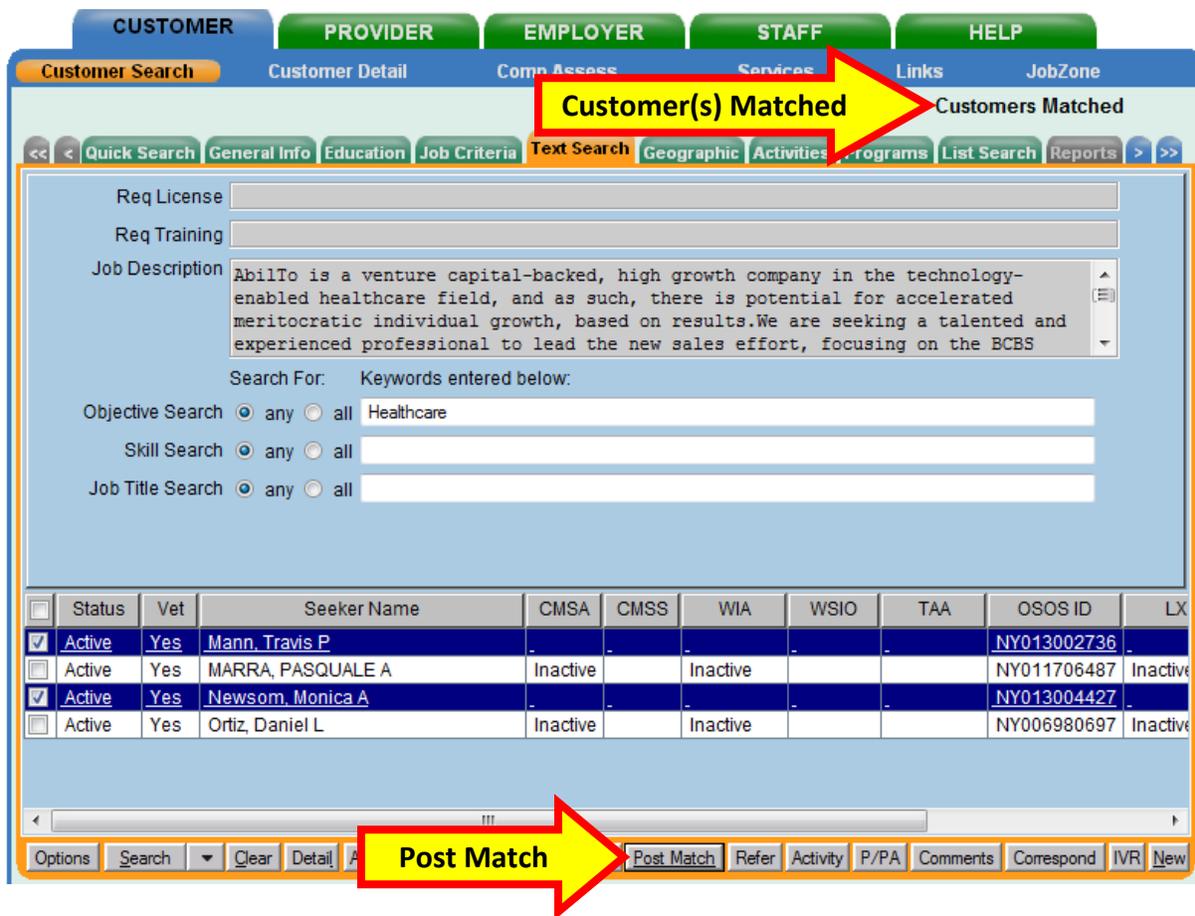
## POSTING THE MATCH

Once the customers are tagged and highlighted, click the **Post Match** button at the bottom of the screen.

A "Customer(s) Matched" message will appear briefly in the upper right of the window to confirm the match was posted.



After the **Post Match** button is clicked, the Match Mode Process is exited.



The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. A red arrow points to a yellow message box that says "Customer(s) Matched". Below this are search filters for Req License, Req Training, Job Description, and Search For (Keywords entered below: Healthcare). There are also radio buttons for Objective Search, Skill Search, and Job Title Search, each with "any" and "all" options. At the bottom, there is a table of search results and a "Post Match" button highlighted with a red arrow.

Status	Vet	Seeker Name	CMSA	CMSS	WIA	WSIO	TAA	OSOS ID	LX
<input checked="" type="checkbox"/>	Active	Yes	Mann, Travis P					NY013002736	
<input type="checkbox"/>	Active	Yes	MARRA, PASQUALE A	Inactive		Inactive		NY011706487	Inactive
<input checked="" type="checkbox"/>	Active	Yes	Newsom, Monica A					NY013004427	
<input type="checkbox"/>	Active	Yes	Ortiz, Daniel L	Inactive		Inactive		NY006980697	Inactive



After a customer(s) has been matched to a job order, the match will automatically show in three places in OSOS:

1. In the **Employer** module, **Job Order Detail** window, **Matches** tab.

The screenshot shows the 'Employer' module with the 'Job Order Detail' window open. The 'Matches' tab is selected. Red arrows point to the 'Employer' tab, the 'Job Order Detail' window title, and the 'Matches' tab. The table below shows the match results:

Match	Staff	OSOS ID	Job Seeker	Vet
<input type="checkbox"/>	05/12/2015 MCKEEVER, KATLIN	NY013002736	Mann, Travis	Yes
<input type="checkbox"/>	05/12/2015 MCKEEVER, KATLIN	NY013004427	Newsom, Monica	Yes

2. In the **Customer** module, **Customer Detail** window, **Activities** tab.

The screenshot shows the 'Customer' module with the 'Customer Detail' window open. The 'Activities' tab is selected. Red arrows point to the 'Customer' tab, the 'Customer Detail' window title, and the 'Activities' tab. The table below shows the activity history:

Match	Activity	Activity Date	Office	Staff	Employer	Job ID	SA	FA
<input type="checkbox"/>	Match	05/12/2015	NY9999	MCKEEVER, KATL	AbilTo	DE0058544	No	
<input type="checkbox"/>	New Job Seeker - Staff Assisted	05/11/2015	NY9999	MCKEEVER, KATL			No	

3. In the **Customer** module, **Services** window, **Service History** tab.

The screenshot shows the 'Customer' module with the 'Services' window open. The 'Service History' tab is selected. Red arrows point to the 'Customer' tab, the 'Service History' tab, and the 'Services' window title. The table below shows the service history:

Match	Service	Date	Staff	Agency	Office	SA
<input type="checkbox"/>	Match	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999	
<input type="checkbox"/>	New Job Seeker - Staff Assisted	05/11/2015	KATLIN MCKEEVER	Department of Labor	NY9999	

Once the match has been made, contact the customer via mail, email (preferred), or phone to identify if the customer(s) is interested in the position.



As a best practice, staff should notify the LVER when a match has been made to a veteran customer so that she/he can follow up with the customer to provide additional assistance.

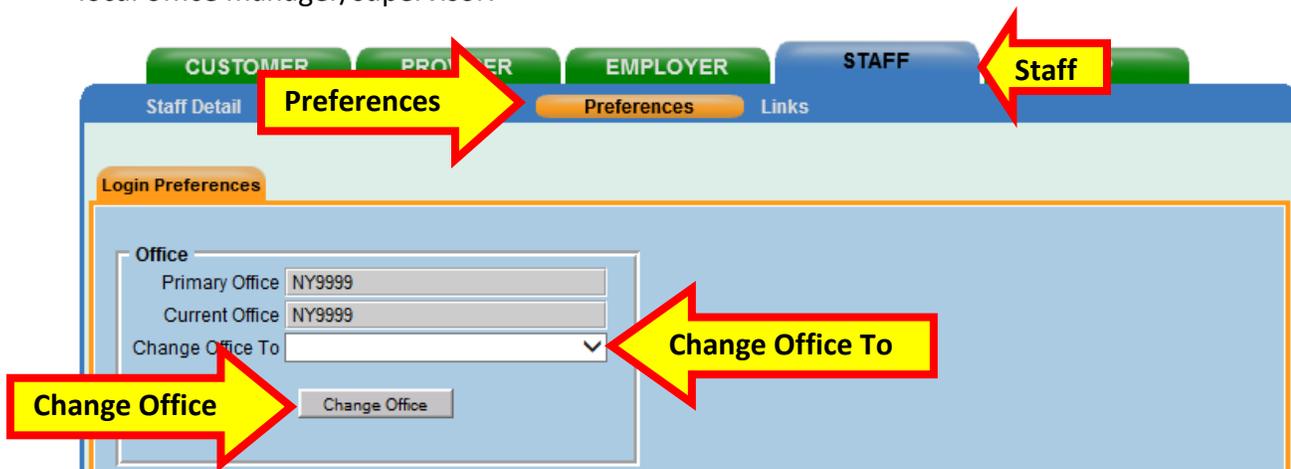
## ADDING REFERRALS

A referral service matches the customer's talents to the specific hiring needs of a business. To ensure quality job referrals, staff should refer customers only when appropriate job qualifications are met.

A referral is a service to the customer that will create or extend an enrollment. **Staff will post referrals in OSOS only when a customer has indicated they have applied to the position.**



When making a referral, staff must be logged into the same office the customer is assigned to (i.e. a Troy customer will need to be referred under the Troy office). To change offices, select the **Staff** module, then the **Preferences** window. In the **Office** section, select the desired office from the **Change Office To** drop-down menu and click the **Change Office** button. To request access for multiple offices, staff must contact their local office manager/supervisor.



The screenshot shows the OSOS interface with the following elements and annotations:

- Navigation Bar:** Includes tabs for CUSTOMER, PROVIDER, EMPLOYER, and STAFF. A red arrow labeled "Staff" points to the STAFF tab.
- Sub-Menu:** Below the STAFF tab are links for Staff Detail, Preferences, and Links. A red arrow labeled "Preferences" points to the Preferences link.
- Login Preferences Section:**
  - Office section with input fields for Primary Office (NY9999) and Current Office (NY9999).
  - A "Change Office To" dropdown menu with a downward arrow. A red arrow labeled "Change Office To" points to this dropdown.
  - A "Change Office" button. A red arrow labeled "Change Office" points to this button.



### FROM THE EMPLOYER MODULE MATCHES TAB

For customers that have been matched to job orders in OSOS and need to be updated to a referral:

Select the customer and click the **Referral** button to update to a referral.

The screenshot shows the OSOS Employer Module interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail, Job Order Search, Job Order Detail (selected), and Links. The main header displays 'AbilTo', 'Order#: DE0058544', 'ID: NY010052875', and '1 of 1'. A secondary set of tabs includes General Info, Contact Info, Job Detail, Job Description, Comments, Matches (selected), Referrals, Saved Searches, Audit, and Priority J. A table with the following data is visible:

Match	Staff	OSOS ID	Job Seeker	Vet
<input checked="" type="checkbox"/>	05/12/2015 MCKEEVER, KATLIN	NY013002736	Mann, Travis	Yes
<input type="checkbox"/>	05/12/2015 MCKEEVER, KATLIN	NY013004427	Newsom, Monica	Yes

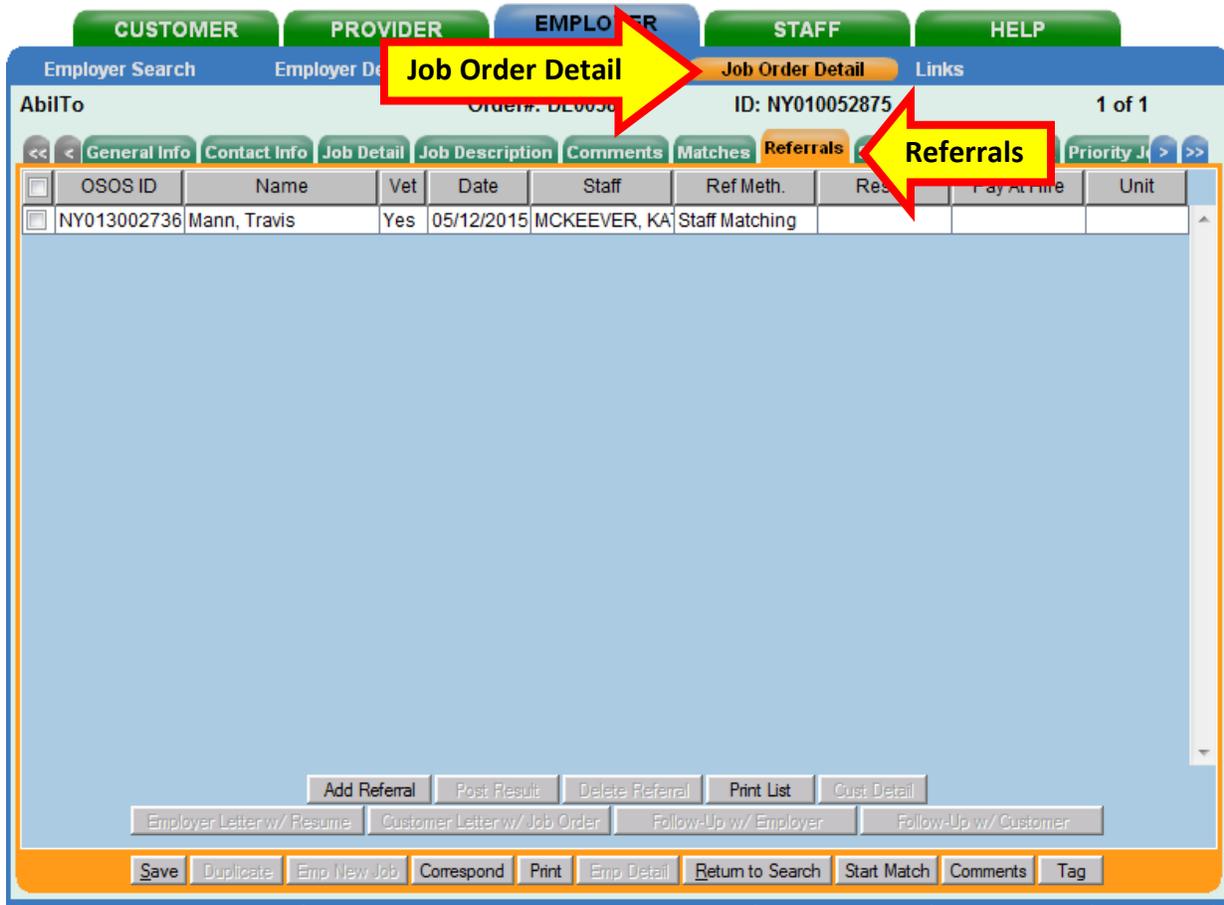
A red arrow labeled 'Select' points to the first row of the table. At the bottom of the window, there are buttons for Referral, IVR, and Cust Detail. A red arrow labeled 'Referral' points to the 'Referral' button. Other buttons at the bottom include Save, Duplicate, Emp New Job, Respond, Print, Emp Detail, Return to Search, Start Match, Comments, and Tag.

A "Customer Referred" message will appear briefly in the upper right of the window and the customer will be posted on the **Referrals** tab.

The screenshot shows the OSOS Employer Module interface after a referral action. The 'EMPLOYER' tab is still selected. The sub-tab 'Referrals' is now selected, and a yellow box with the text 'Customer Referred' is overlaid on the top right of the window. The 'Matches' tab is also visible. The table from the previous screenshot is still present, showing the same two matches.

FROM THE EMPLOYER MODULE REFERRALS TAB

The referral is posted to the **Employer** module, **Job Order Detail** window, **Referrals** tab.



The screenshot displays the 'Job Order Detail' window for Job Order ID: NY010052875. The 'Referrals' tab is active, showing a table with the following data:

OSOS ID	Name	Vet	Date	Staff	Ref Meth.	Res	Pay At Hire	Unit
NY013002736	Mann, Travis	Yes	05/12/2015	MCKEEVER, KA	Staff Matching			

At the bottom of the window, there are several action buttons: Add Referral, Post Result, Delete Referral, Print List, Cust Detail, Employer Letterw/ Resume, Customer Letterw/ Job Order, Follow-Up w/ Employer, Follow-Up w/ Customer, Save, Duplicate, Emp New Job, Correspond, Print, Emp Detail, Return to Search, Start Match, Comments, and Tag.

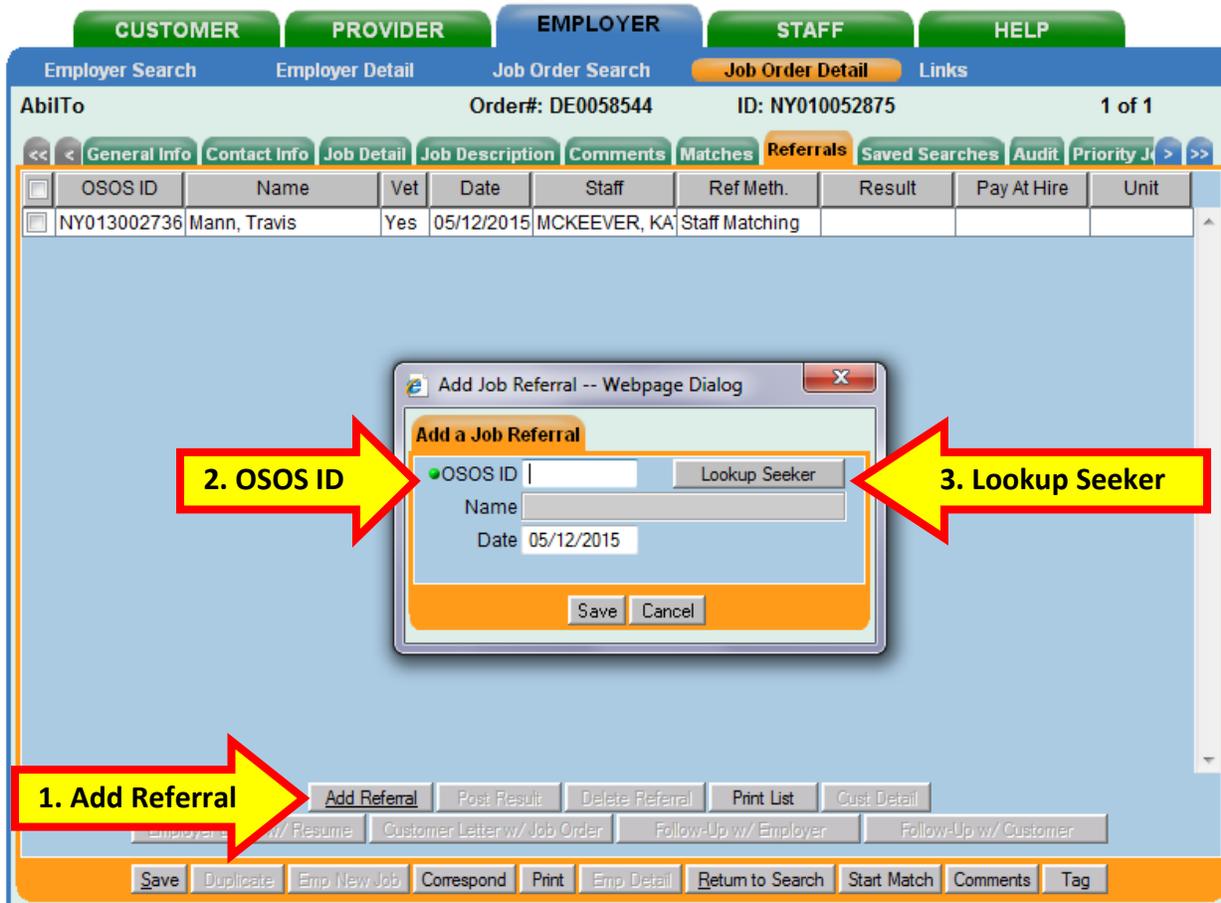
### ADDING A DIRECT REFERRAL

If a customer has not been previously matched, the user can add a customer referral to a job order in OSOS.

 A direct referral is often done when staff is working with the customer in person and the customer has confirmed that they intend to apply to the job.

Click the **Add Referral** button in this tab. The date data field populates automatically.

Enter the customer's **OSOS ID** number in the Add Job Referral dialog box and click the **Lookup Seeker** button.



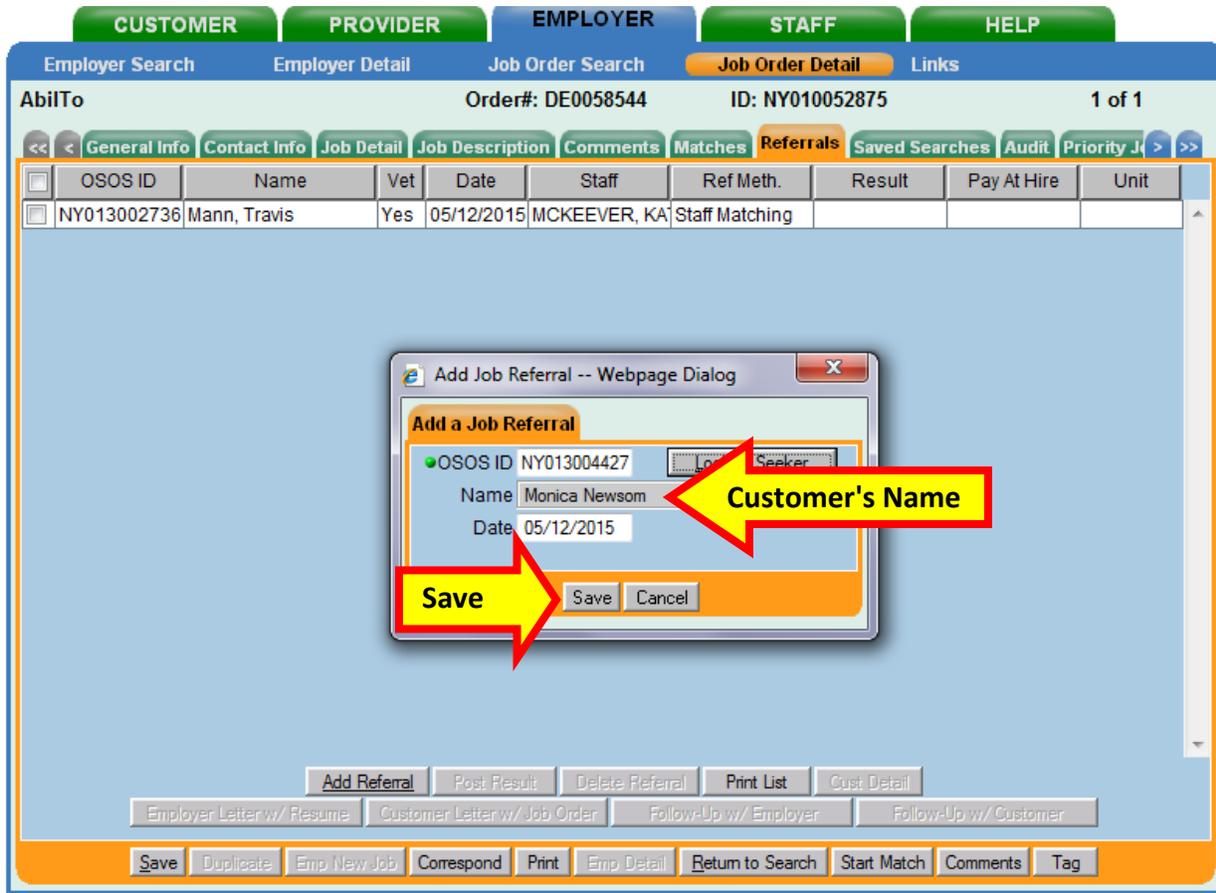
The screenshot shows the OSOS interface with the 'Job Order Detail' tab selected. A table lists job order details, including OSOS ID, Name, Vet, Date, Staff, Ref Meth., Result, Pay At Hire, and Unit. A dialog box titled 'Add Job Referral -- Webpage Dialog' is open, containing the following fields and buttons:

- OSOS ID**: A text input field with a 'Lookup Seeker' button next to it.
- Name**: A text input field.
- Date**: A text input field containing '05/12/2015'.
- Buttons**: 'Save' and 'Cancel' buttons at the bottom.

Red arrows with yellow text labels indicate the following steps:

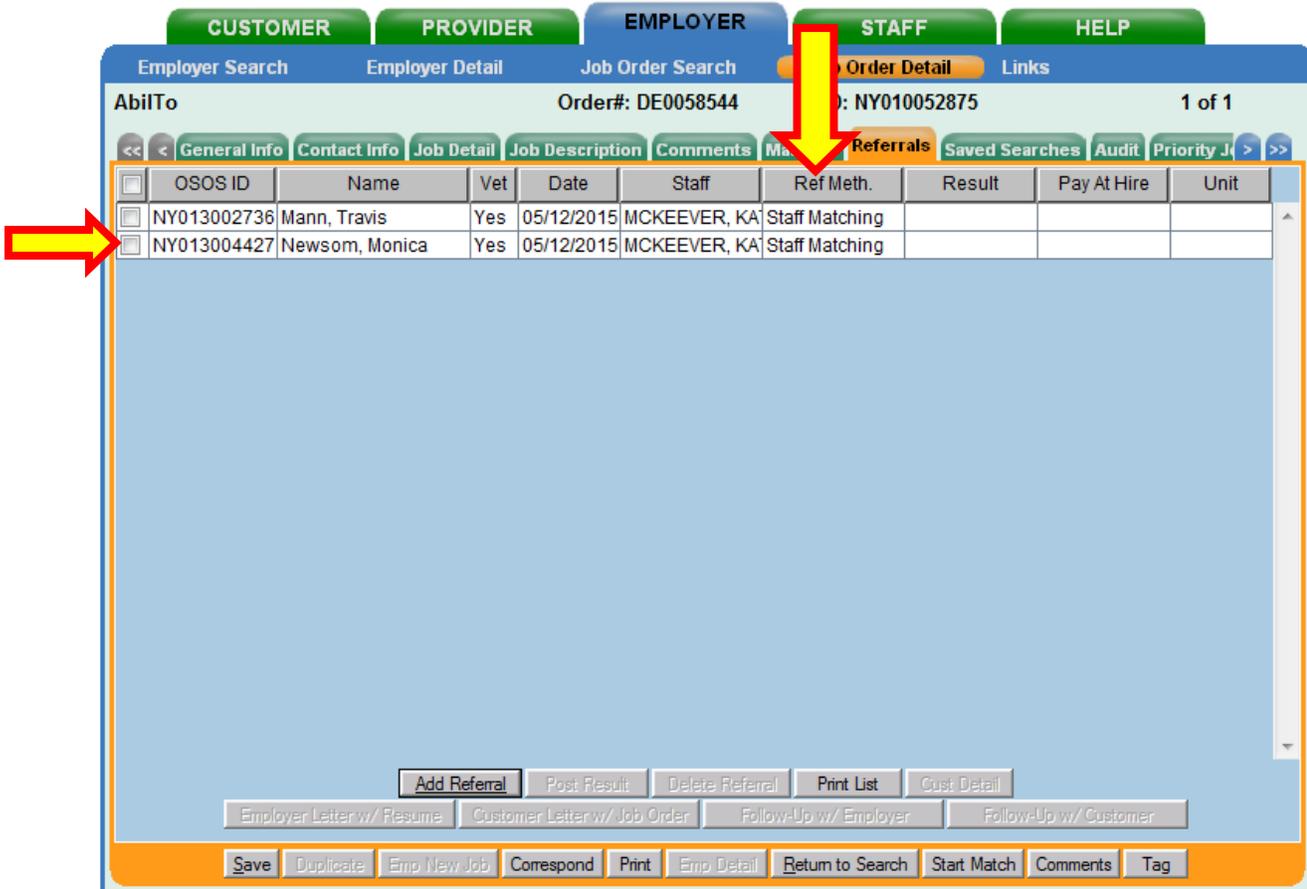
- 1. Add Referral**: Points to the 'Add Referral' button in the main interface.
- 2. OSOS ID**: Points to the 'OSOS ID' input field in the dialog box.
- 3. Lookup Seeker**: Points to the 'Lookup Seeker' button in the dialog box.

The customer's name will appear in the dialog box. Click the **Save** button.



The screenshot displays the OSOS web application interface. 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, Job Order Detail (selected), and Links. The main header shows 'AbilTo' with 'Order#: DE0058544' and 'ID: NY010052875' (1 of 1). A table lists job orders, with one entry for 'Mann, Travis' (OSOS ID: NY013002736). A dialog box titled 'Add Job Referral -- Webpage Dialog' is open, showing 'Add a Job Referral' with fields for OSOS ID (NY013004427), Name (Monica Newsom), and Date (05/12/2015). A red arrow points to the Name field with the text 'Customer's Name', and another red arrow points to the Save button with the text 'Save'. At the bottom of the dialog are 'Save' and 'Cancel' buttons. The main application footer contains various action buttons like 'Add Referral', 'Post Result', 'Delete Referral', 'Print List', 'Cost Detail', 'Employer Letter w/ Resume', 'Customer Letter w/ Job Order', 'Follow-Up w/ Employer', 'Follow-Up w/ Customer', 'Save', 'Duplicate', 'Emp New Job', 'Correspond', 'Print', 'Emp Detail', 'Return to Search', 'Start Match', 'Comments', and 'Tag'.

The customer will be added as a referral.



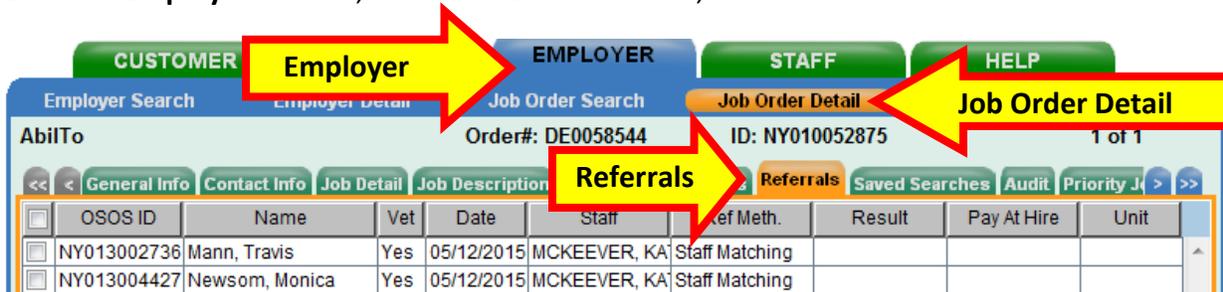
The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail, Job Order Search, Order Detail (highlighted), and Links. The main content area displays 'AbilTo' with 'Order#: DE0058544' and 'NY010052875'. A yellow arrow points to the 'Referrals' tab. Below the tabs is a table with the following data:

<input type="checkbox"/>	OSOS ID	Name	Vet	Date	Staff	Ref Meth.	Result	Pay At Hire	Unit
<input type="checkbox"/>	NY013002736	Mann, Travis	Yes	05/12/2015	MCKEEVER, KA	Staff Matching			
<input type="checkbox"/>	NY013004427	Newsom, Monica	Yes	05/12/2015	MCKEEVER, KA	Staff Matching			

At the bottom of the interface, there are several buttons: Add Referral, Post Result, Delete Referral, Print List, Cust Detail, Employer Letter w/ Resume, Customer Letter w/ Job Order, Follow-Up w/ Employer, Follow-Up w/ Customer, Save, Duplicate, Emp New Job, Correspond, Print, Emp Detail, Return to Search, Start Match, Comments, and Tag.

After the referral is saved it will be recorded in 3 locations in OSOS.

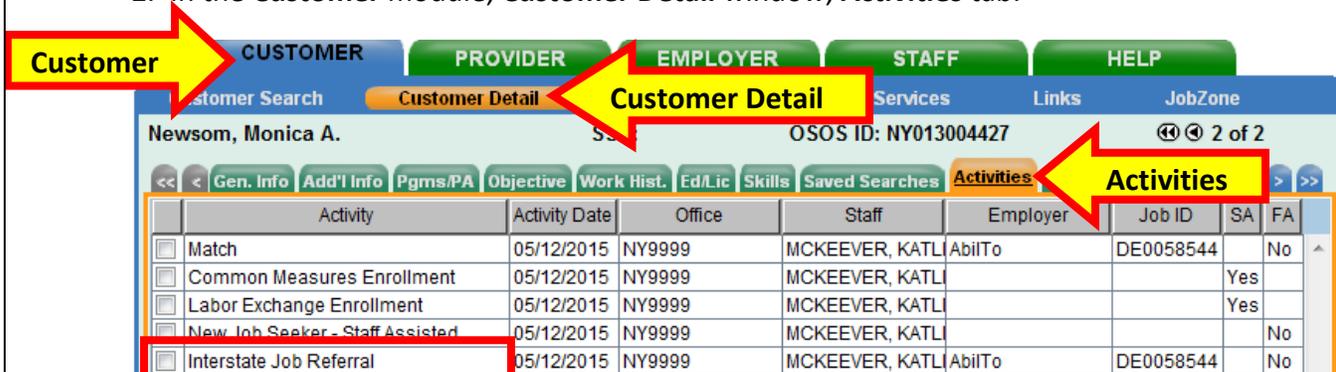
1. In the **Employer** module, **Job Order Detail** window, **Referrals** tab.



The screenshot shows the 'EMPLOYER' module with the 'Job Order Detail' window open. The 'Referrals' tab is selected. Red arrows point to the 'Employer' button, the 'Job Order Detail' window title, and the 'Referrals' tab. The table below shows two referrals:

OSOS ID	Name	Vet	Date	Staff	Ref Meth.	Result	Pay At Hire	Unit
NY013002736	Mann, Travis	Yes	05/12/2015	MCKEEVER, KATL	Staff Matching			
NY013004427	Newsom, Monica	Yes	05/12/2015	MCKEEVER, KATL	Staff Matching			

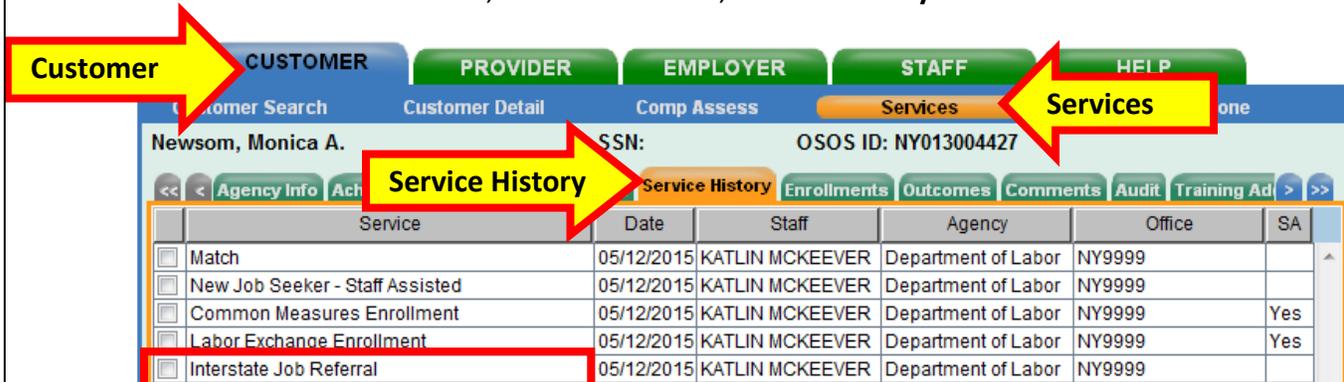
2. In the **Customer** module, **Customer Detail** window, **Activities** tab.



The screenshot shows the 'CUSTOMER' module with the 'Customer Detail' window open. The 'Activities' tab is selected. Red arrows point to the 'Customer' button, the 'Customer Detail' window title, and the 'Activities' tab. The table below shows several activities, with 'Interstate Job Referral' highlighted in red:

Activity	Activity Date	Office	Staff	Employer	Job ID	SA	FA
Match	05/12/2015	NY9999	MCKEEVER, KATL	AbilTo	DE0058544	No	
Common Measures Enrollment	05/12/2015	NY9999	MCKEEVER, KATL			Yes	
Labor Exchange Enrollment	05/12/2015	NY9999	MCKEEVER, KATL			Yes	
New Job Seeker - Staff Assisted	05/12/2015	NY9999	MCKEEVER, KATL				No
Interstate Job Referral	05/12/2015	NY9999	MCKEEVER, KATL	AbilTo	DE0058544		No

3. In the **Customer** module, **Services** window, **Service History** tab.



The screenshot shows the 'CUSTOMER' module with the 'Services' window open. The 'Service History' tab is selected. Red arrows point to the 'Customer' button, the 'Service History' tab, and the 'Services' window title. The table below shows several services, with 'Interstate Job Referral' highlighted in red:

Service	Date	Staff	Agency	Office	SA
Match	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999	
New Job Seeker - Staff Assisted	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999	
Common Measures Enrollment	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999	Yes
Labor Exchange Enrollment	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999	Yes
Interstate Job Referral	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999	



As a best practice, staff should notify the LVER when a referral has been added for a veteran customer so that she/he can follow up with the business to provide additional services.



## RESOURCES AND ASSISTANCE

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

<https://labor.ny.gov/workforcenypartners/osos.shtm>

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

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