

Performing a Customer Search OSOS Guide



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PURPOSE

This guide is intended to help staff understand how to perform and customize a customer search in OSOS. It will cover:

- Using, customizing, and saving Search Options,
- Searching in the Quick Search link,
- And searching in each of the Active Customer Search links



BACKGROUND INFORMATION

To complete their assigned job duties, staff will often need to search for a customer record or records within OSOS.

Searches are performed within the **Customer Search** window, in the **Customer** module on the **Criteria** tab. While searches are most commonly performed from the **Quick Search** link, any of the active links can be used in the search process.

The screenshot shows the OSOS interface with a top navigation bar containing 'CUSTOMER', 'PROVIDER', 'EMPLOYER', and 'STAFF'. Below this is a secondary bar with 'Customer Search' and 'Detail'. A yellow arrow points from 'Customer Search' to the 'Criteria' tab in the next bar. Below that is a search criteria bar with 'Quick Search' highlighted and other options like 'General Info', 'Education', etc. The main area is titled 'Customer Quick Search' and contains three columns of input fields: 'Customer SSN' (with a 'Validate SSN List' button), 'Customer ID' (with a 'Validate Customer ID List' button), and a vertical list of fields including 'Partial SSN', 'Last Name', 'First Name', 'Middle Initial', 'Birth Date', 'Username', 'Email Exists' (dropdown), and 'Email'.



QUICK SEARCH OPTIONS

Before conducting a search, staff should customize their search options.

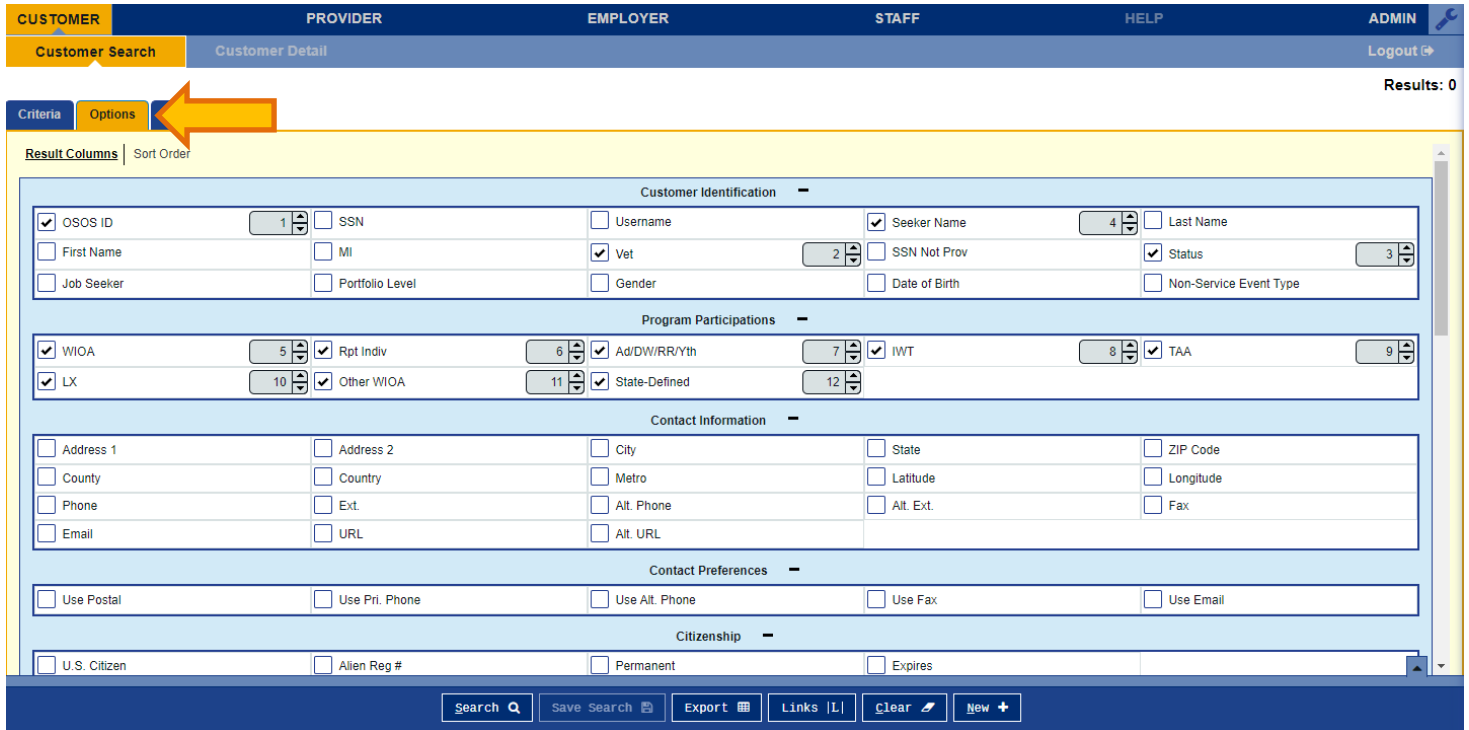
The gray title bar in the **Results** tab shows what information about the customer(s) will be displayed in the initial search results. However, the default settings on this bar may not be relevant to every staff member's job duties. Customizing the fields on this bar helps ensure that the search results are displayed in a way that is efficient and helpful for staff.

To access the search options, click on the **Options** tab at the top left of the screen.

The screenshot displays the OSOS Customer Search interface. At the top, there are three tabs: **CUSTOMER**, **PROVIDER**, and **EMPLOYER**. Below these, there are two sub-tabs: **Customer Search** and **Customer Detail**. The main interface is divided into three sections: **Criteria**, **Options**, and **Results**. The **Criteria** section includes a navigation bar with links for **Quick Search**, **General Info**, **Education**, **Job Criteria**, **Text Search**, **Geographic**, **Activities**, **Programs**, and **List Search**. The **Options** section is titled "Customer Quick Search" and contains three main input areas: "Customer SSN - SSN 1" with a "Validate SSN List" button, "Customer ID - ID 1" with a "Validate Customer ID List" button, and a vertical list of fields including "Partial SSN", "Last Name", "First Name", "Middle Initial", "Birth Date", "Username", "Email Exists" (with a dropdown arrow), and "Email".

The Customer **Search Result** Columns displays all the fields that can be added to the title bar. These fields can be selected or de-selected by clicking on the check box next to them.

The number to the right of the field name indicates the order in which the fields will be displayed on the title bar. Staff can change this order by manually re-numbering the selected fields or by clicking and dragging the sections in the gray preview title bar at the bottom of the pop-up.



The screenshot shows the OSOS Customer Search interface. The 'Options' tab is selected, and the 'Result Columns' section is expanded. The fields are organized into several categories:

- Customer Identification:** OSOS ID (1), SSN, Username, Seeker Name (4), Last Name, First Name, MI, Vet (2), SSN Not Prov, Status (3), Job Seeker, Portfolio Level, Gender, Date of Birth, Non-Service Event Type.
- Program Participations:** WIOA (5), Rpt Indiv (6), Ad/DW/RR/Yth (7), IWT (8), TAA (9), LX (10), Other WIOA (11), State-Defined (12).
- Contact Information:** Address 1, Address 2, City, State, ZIP Code, County, Country, Metro, Latitude, Longitude, Phone, Ext., Alt. Phone, Alt. Ext., Fax, Email, URL, Alt. URL.
- Contact Preferences:** Use Postal, Use Pri. Phone, Use Alt. Phone, Use Fax, Use Email.
- Citizenship:** U.S. Citizen, Alien Reg #, Permanent, Expires.

At the bottom of the interface, there are buttons for Search, Save Search, Export, Links, Clear, and New.

Helpful fields that staff should consider including in their search results are:

- OSOS ID
- Seeker Name
- Status
- Vet
- Date of Birth
- Address
- City and
- Zip Code



Seeker Name and Date of Birth are both important fields to include, as staff can use this information to easily identify potential duplicate OSOS records.



Staff should also consider their assigned job duties and select fields which will best assist them in efficiently identifying customers in the context of their work assignments.

For example, a staff member who routinely matches customers to job orders might want to display fields from **Employment Preferences**, **Employment Objective**, or **Driver's License** to help them quickly identify customers who match the job order specifications. A staff member working primarily with veteran customers may wish to include fields from the **Military/Selective Service** section.

To further customize how the search results will be displayed, click on the **Sort Order** link. This link is used to determine how the search results will be ordered when they display.

| Military / Selective Service | | | | | |
|---|---|--|---|---|--|
| <input type="checkbox"/> Service Veteran | <input checked="" type="checkbox"/> Vet Status | 18 | <input type="checkbox"/> Veteran Era | <input type="checkbox"/> Service From | <input type="checkbox"/> Service Thru |
| <input type="checkbox"/> Current Housing | <input type="checkbox"/> Current Housing (2) | | <input type="checkbox"/> Service Disability | <input type="checkbox"/> Campaign Veteran | <input type="checkbox"/> In Country |
| <input type="checkbox"/> Type | <input checked="" type="checkbox"/> Branch | 19 | <input checked="" type="checkbox"/> Other Barriers to Employment? | 20 | <input type="checkbox"/> Selective Service? |
| | | | | | <input type="checkbox"/> Selective Service # |
| Employment Preferences | | | | | |
| <input checked="" type="checkbox"/> Work Week | 13 | <input type="checkbox"/> Duration | <input type="checkbox"/> Salary | <input type="checkbox"/> Pay Unit | <input type="checkbox"/> Norm. Salary |
| <input checked="" type="checkbox"/> Date Available | 14 | <input type="checkbox"/> First Shift | <input type="checkbox"/> Second Shift | <input type="checkbox"/> Third Shift | <input type="checkbox"/> Split Shift |
| <input type="checkbox"/> Rotating Shift | | | | | |
| Employment Objective | | | | | |
| <input checked="" type="checkbox"/> Empl. Objective | 15 | <input type="checkbox"/> Desired Job Title | <input type="checkbox"/> Add'l Skills Text | <input type="checkbox"/> No Work Hist Info Provided | <input type="checkbox"/> No School Info Provided |
| <input type="checkbox"/> No Lic/Cert Info Provided | | <input type="checkbox"/> No Prof Assoc Info Provided | | | |
| Driver's License | | | | | |
| <input type="checkbox"/> Driver Flag | <input checked="" type="checkbox"/> License Class | 17 | <input type="checkbox"/> License State | <input type="checkbox"/> Air Brakes | <input type="checkbox"/> School Bus |
| <input checked="" type="checkbox"/> Motorcycle | 16 | <input type="checkbox"/> Doubles/Triples | <input type="checkbox"/> Haz. Materials | <input type="checkbox"/> Pass Transport | <input type="checkbox"/> Tank Vehicle |
| <input type="checkbox"/> Tank Hazard | | <input type="checkbox"/> Tow Truck | | | |

The option selected from the drop-down menu in the **First** data field will be the initial criteria used to sort and display search results. The selection from the drop-down menu by the **Second** data field will be used to further break down the results. The subsequent drop-down menus will continue to further define how the search results are ordered.

Checking the **Ascending** or **Descending** buttons will determine if the results will be listed in alphabetic (ascending) order or in reverse-alphabetical (descending) order. In the example above, **Vet** has been selected in the **First** data field. Accordingly, OSOS will initially sort the search results based on whether or not the customer is a veteran.

Note that the **Descending** button is selected. This means the results will be displayed in reverse-alphabetical order. Because Yes is alphabetically **after** No, OSOS will list all the customers with the Veteran field marked as Yes before the customers with the Veteran field marked as No.

| | | |
|-----------------|-----------------|-----------------|
| CUSTOMER | PROVIDER | EMPLOYER |
| Customer Search | Customer Detail | |

| | | |
|------------------------------------|----------------|---|
| Criteria | Options | Results |
| Result Columns <u>Sort Order</u> | | |
| First | Vet | <input type="radio"/> Ascending <input checked="" type="radio"/> Descending |
| Second | Last Name | <input checked="" type="radio"/> Ascending <input type="radio"/> Descending |
| Third | First Name | <input checked="" type="radio"/> Ascending <input type="radio"/> Descending |

Last Name is selected in the **Second** data field. This means that after the customers have been sorted as veteran or non-veteran, they will be sorted within those two groups based on their Last name. Because the **Ascending** button is selected, the names will be displayed in alphabetical order.

The resulting search will show veterans listed by name in alphabetical order, followed by non-veterans listed by name in alphabetical order.

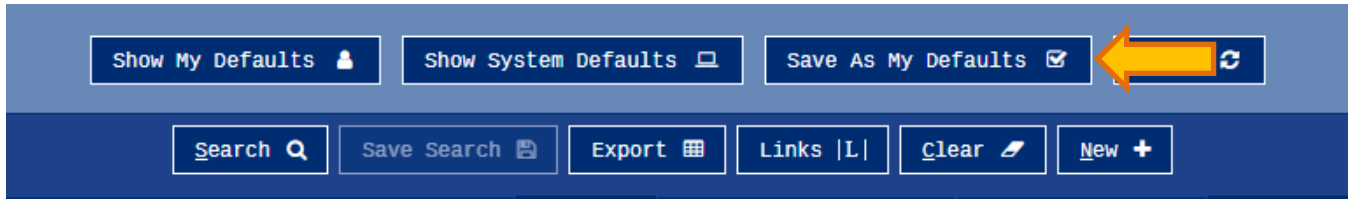
Additionally, on the **Results** tab, staff can use the Results Per Page drop-down menu to set how many results can be returned in a single screen which will appear after your search results.

| | | | | | |
|--------------------------|-----------------|-----------------|----------|---------------|--------|
| CUSTOMER | PROVIDER | EMPLOYER | | | |
| Customer Search | Customer Detail | | | | |
| Criteria | Options | Results | | | |
| <input type="checkbox"/> | OSOS ID ⇅ | Vet ⇅ | Status ⇅ | Seeker Name ⇅ | WIOA ⇅ |
| No search results | | | | | |

Once staff has selected the fields and the display order that will be the most useful to them, they should save the settings.



Click the **Save As My Defaults** button at the bottom of the screen and then click the **Apply** button.



This will ensure that these settings will remain as the default settings used each time that staff member runs a customer search in OSOS. These settings can be changed at any time, either to alter the defaults or to run a single search.

QUICK SEARCH LINK

Once the search options have been customized, a customer search can be performed. A customer search is most frequently performed from the **Quick Search** link in the **Customer Search** window.

SEARCHING BY NAME

Staff may search for a customer record by **full or partial name**. Enter as much information as is known into the Last Name and First Name data fields.

Then click the **Search** button.



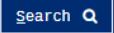
As a best practice, staff should perform a name search for any customer they are working with to determine if duplicate OSOS records exist for the same customer. For more information, please see [Identifying and Reporting Duplicate Records](#).

| CUSTOMER | PROVIDER | EMPLOYER | STAFF |
|-----------------|-----------------|----------|-------|
| Customer Search | Customer Detail | | |

| Criteria | Options | Results |
|---|---------|---------|
| Quick Search General Info Education Job Criteria Text Search Geographic Activities Programs List Search | | |

Customer Quick Search

| | | |
|--|---|---|
| <p>Customer SSN SSN 1</p> <input type="text"/> Enter or paste one or more Customer SSNs <input type="text"/> <input type="button" value="Validate SSN List"/> | <p>Customer ID ID 1</p> <input type="text"/> Enter or paste one or more Customer IDs <input type="text"/> <input type="button" value="Validate Customer ID List"/> | <p>Partial SSN</p> <input type="text"/> <p>Last Name</p> <input type="text" value="Smith"/> <p>First Name</p> <input type="text" value="John"/> <p>Middle Initial</p> <input type="text"/> <p>Birth Date</p> <input type="text"/> <p>Username</p> <input type="text"/> <p>Email Exists</p> <input type="text" value=""/> <p>Email</p> <input type="text"/> |
|--|---|---|

| | | | | | | |
|---|--|---------------------------------------|--|--------------------------------------|--------------------------------------|---------------------------------------|
|  | <input type="button" value="Save Search"/> | <input type="button" value="Export"/> | <input type="button" value="Links L "/> | <input type="button" value="Clear"/> | <input type="button" value="New +"/> | <input type="button" value="Custom"/> |
|---|--|---------------------------------------|--|--------------------------------------|--------------------------------------|---------------------------------------|



If there is only one result returned, OSOS will display the customer's record. It will default to the **General Information** tab of the **Customer Detail** window.

CUSTOMER PROVIDER EMPLOYER STAFF HELP ADMIN

Customer Search **Customer Detail** Logout

Tester, Josh SSN: OSOS ID: NY016790310 1 of 1

General Info Add'l Info Resume Data Planning Comp Assess Programs Outcomes Saved Searches Services Tests Comments Attach

Customer Info

Customer Data

*SSN: Active *Status: Active *Job Seeker: Active *Ethnic Heritage and Race

*Username: Brownbear *Password: 123frog987 Merge

*Last Name: Tester *First Name: Josh MI

*Date of Birth: 05/13/2004 *Gender: Male *Portfolio Level: Young Adult

*Address 1: 123 Testing Lane

Address 2:

*City: Albany *State: New York *ZIP Code: 12205

County: Albany Country: United States Metro:

Phone: Ext. Alt. Phone Ext. Fax

Email: Joshtester@gmail.com URL: Alt. URL

Enrollments JZ/CZ Manager: No Add to Case Load

Citizenship

* U.S. Citizen

Education & Employment

*Education Level: 12 Grade - HS Graduate

*School Status: Not Attending School; Secondary School Graduate/Equivalent

*Employment Status: Not Employed

Underemployed Long Term Unemployed

Contact Preferences

Use Postal Pri. Phone Alt. Phone Fax

Email

Customer Assignment

Staff Assigned: ADMIN, IAM Change WIB Assigned: NYSDOL - CO

Agency: Department of Labor Office: NY9999 Change Office

UI Claimant: Registered: 05/24/2022 Origin: Profiled: Profiled Date:

Internet Resume Confidential Work Search Record

If there is more than one customer record matching the search criteria, the customers' information will be displayed in the **Results** tab on the **Customer Search** window.

Criteria Options **Results**

1-53 of 53 1 100

| | OSOS ID | Vet | Status | Seeker Name | WIOA | Rpt Indiv | Ad/DW/RR/Yth |
|--------------------------|-------------|-----|----------|--------------|----------|-----------|--------------|
| <input type="checkbox"/> | | | | | | | |
| <input type="checkbox"/> | NY016787980 | Yes | Inactive | test, test | Inactive | Inactive | |
| <input type="checkbox"/> | NY015046328 | Yes | Active | tester, test | Inactive | Inactive | |



Clicking on any column in the gray title bar will re-sort the results based on that field.

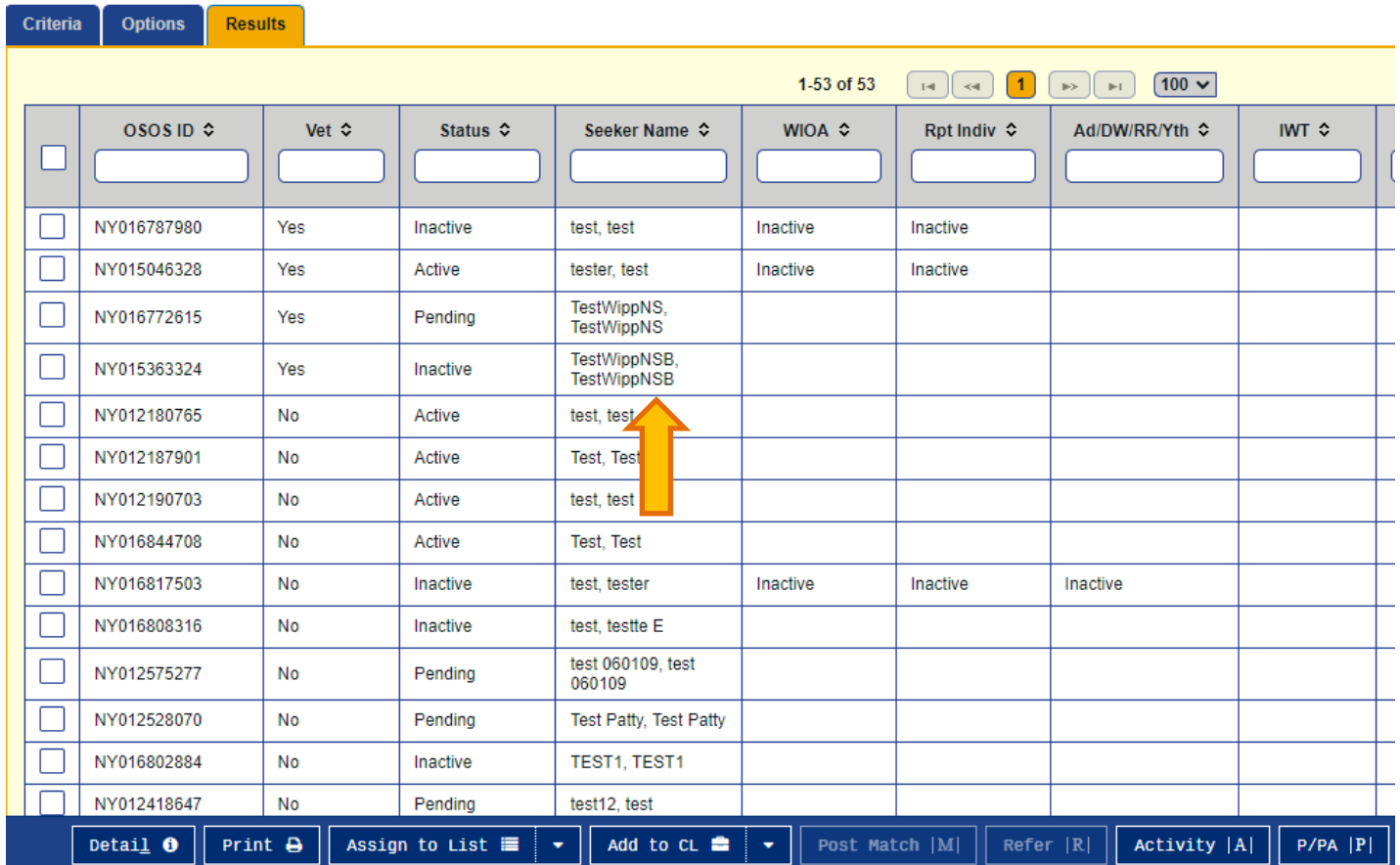
If the search yields more than one result, staff can view all the records by first clicking on the check box in the top left corner of the gray title bar. This will select all the results. Staff can then click on **Detail** at the bottom of the screen to review all selected customer records.



Navigation bar containing buttons: Detail, Assign to List, Add to CL, Post Match |M|, Refer |R|, Activity |A|, P/PA |P|, Comments, Correspond, IVR, Links |L|, Clear, New +.

OSOS will display the customer record of the first customer selected. Use the arrows at the top right corner of the screen to toggle through the customer records.

Staff can review the records to identify the customer they were searching for, as well as to identify potential duplicate records.

Criteria Options Results

1-53 of 53 [Navigation icons] 100

| <input type="checkbox"/> | OSOS ID | Vet | Status | Seeker Name | WIOA | Rpt Indiv | Ad/DW/RR/Yth | IWT |
|--------------------------|-------------|-----|----------|--------------------------|----------|-----------|--------------|-----|
| <input type="checkbox"/> | NY016787980 | Yes | Inactive | test, test | Inactive | Inactive | | |
| <input type="checkbox"/> | NY015046328 | Yes | Active | tester, test | Inactive | Inactive | | |
| <input type="checkbox"/> | NY016772615 | Yes | Pending | TestWippNS, TestWippNS | | | | |
| <input type="checkbox"/> | NY015363324 | Yes | Inactive | TestWippNSB, TestWippNSB | | | | |
| <input type="checkbox"/> | NY012180765 | No | Active | test, test | | | | |
| <input type="checkbox"/> | NY012187901 | No | Active | Test, Test | | | | |
| <input type="checkbox"/> | NY012190703 | No | Active | test, test | | | | |
| <input type="checkbox"/> | NY016844708 | No | Active | Test, Test | | | | |
| <input type="checkbox"/> | NY016817503 | No | Inactive | test, tester | Inactive | Inactive | Inactive | |
| <input type="checkbox"/> | NY016808316 | No | Inactive | test, testte E | | | | |
| <input type="checkbox"/> | NY012575277 | No | Pending | test 060109, test 060109 | | | | |
| <input type="checkbox"/> | NY012528070 | No | Pending | Test Patty, Test Patty | | | | |
| <input type="checkbox"/> | NY016802884 | No | Inactive | TEST1, TEST1 | | | | |
| <input type="checkbox"/> | NY012418647 | No | Pending | test12, test | | | | |

Navigation bar containing buttons: Detail, Print, Assign to List, Add to CL, Post Match |M|, Refer |R|, Activity |A|, P/PA |P|.



If the search yields too many customers for staff to reasonably review, additional search criteria should be used. This can be done in a variety of ways and will be reviewed later in this guide.

SEARCHING BY SOCIAL SECURITY NUMBER OR CUSTOMER NY ID

If the customer's **full social security number** or **NY ID number** is known, it can be entered in the **Quick Search** link to find the customer record.

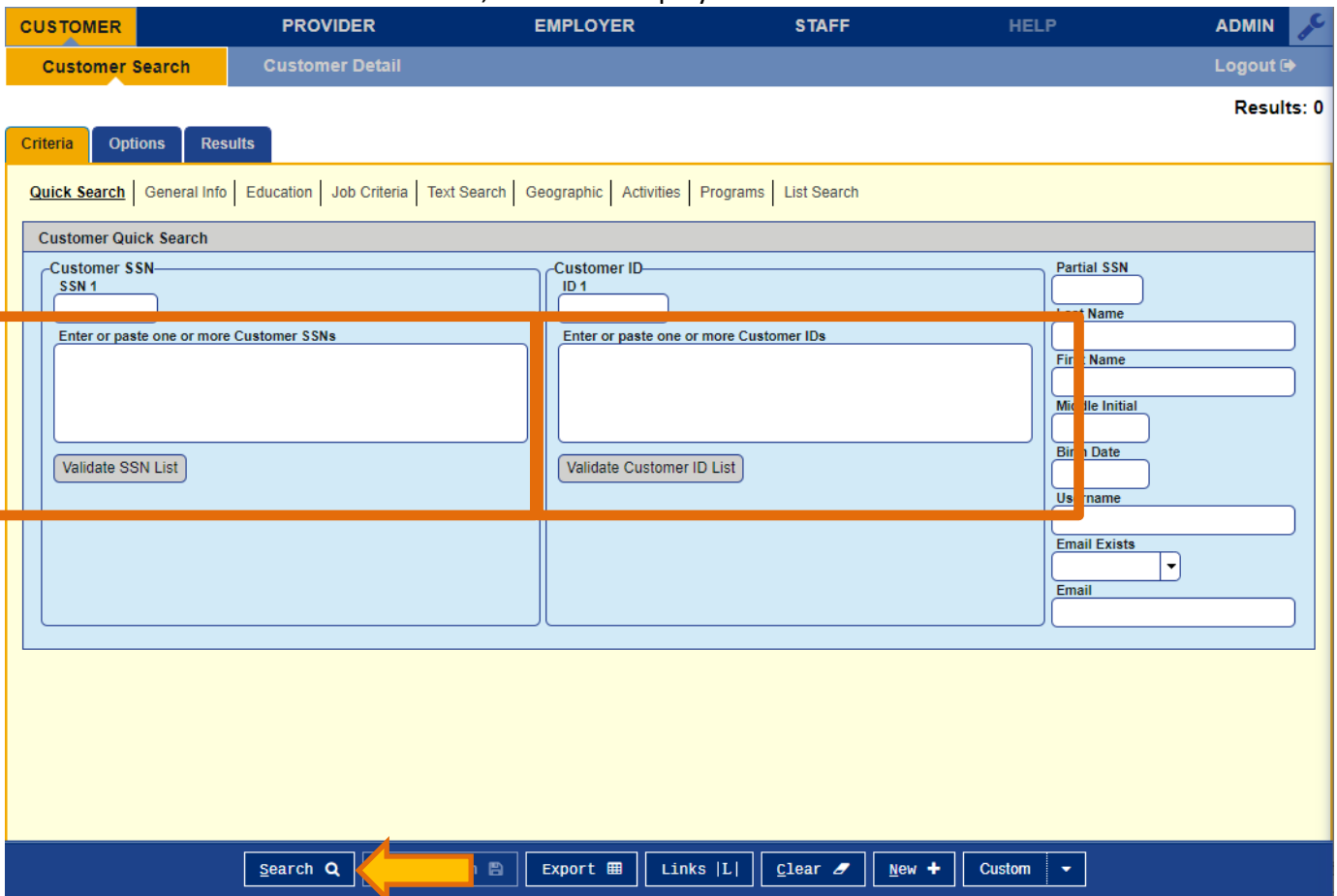


This should not be done the first-time staff is searching for a customer record. It may be done subsequently, after a name search has already been performed to check for duplicate records.

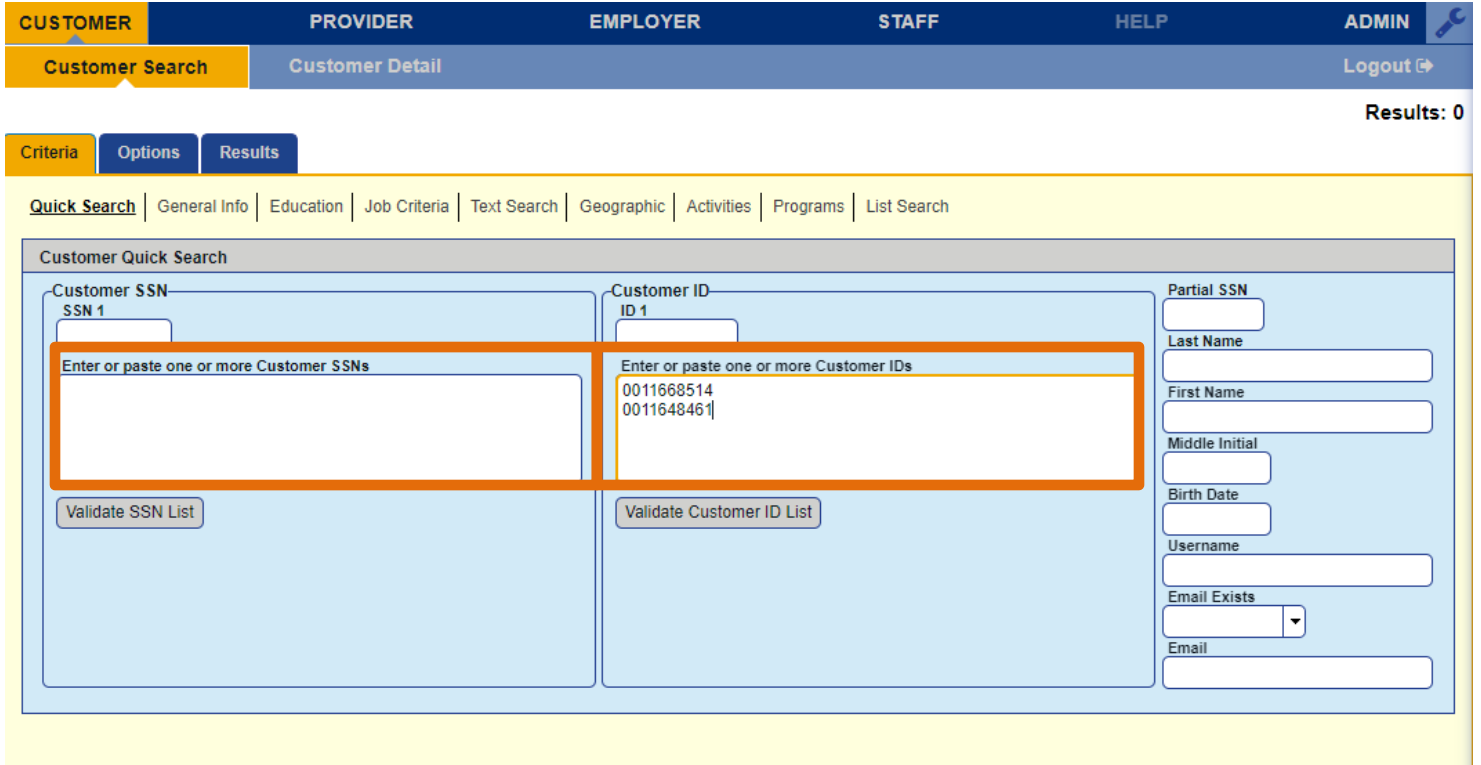
To search by **social security number**, enter the entire number in the **SSN 1** data field within the **Customer SSN** section. Do not include dashes.

To search by **ID number**, enter the customer's NY ID number in the **ID 1** data field within the **Customer ID** section. It is not necessary to include "NY" at the beginning of the number.

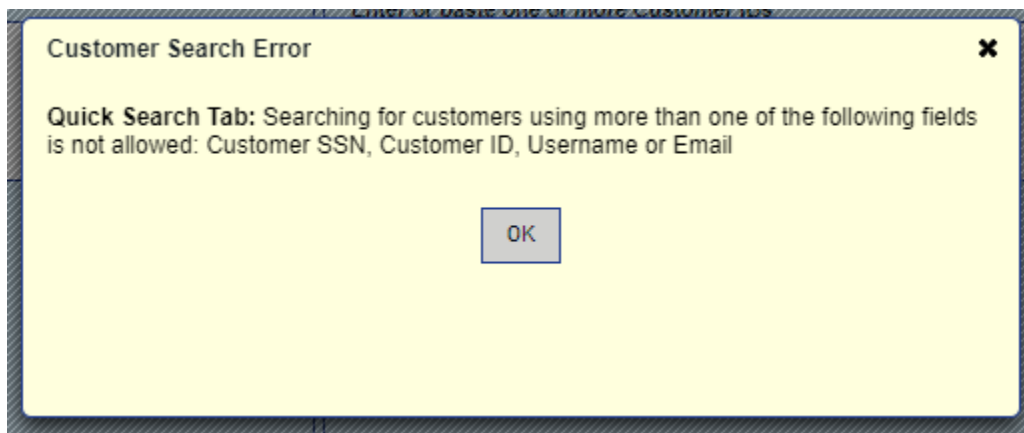
Click the **Search** button at the bottom of the screen or press the **Enter** on the keyboard. If only one ID number has been entered, OSOS will display the customer's record.



To pull up a list of customers, additional social security numbers or NY ID numbers can be typed into the large data windows in the **Customer SSN** or **Customer ID** section.




*The search can be based on either **SSN** or **ID number**, but it cannot be based on both. Including data in both the Customer SSN field and the Customer ID field will result in an error message.*



Staff may know more than just the name of the customer they are searching for. Entering additional information in the **Quick Search** link can help narrow down search results.

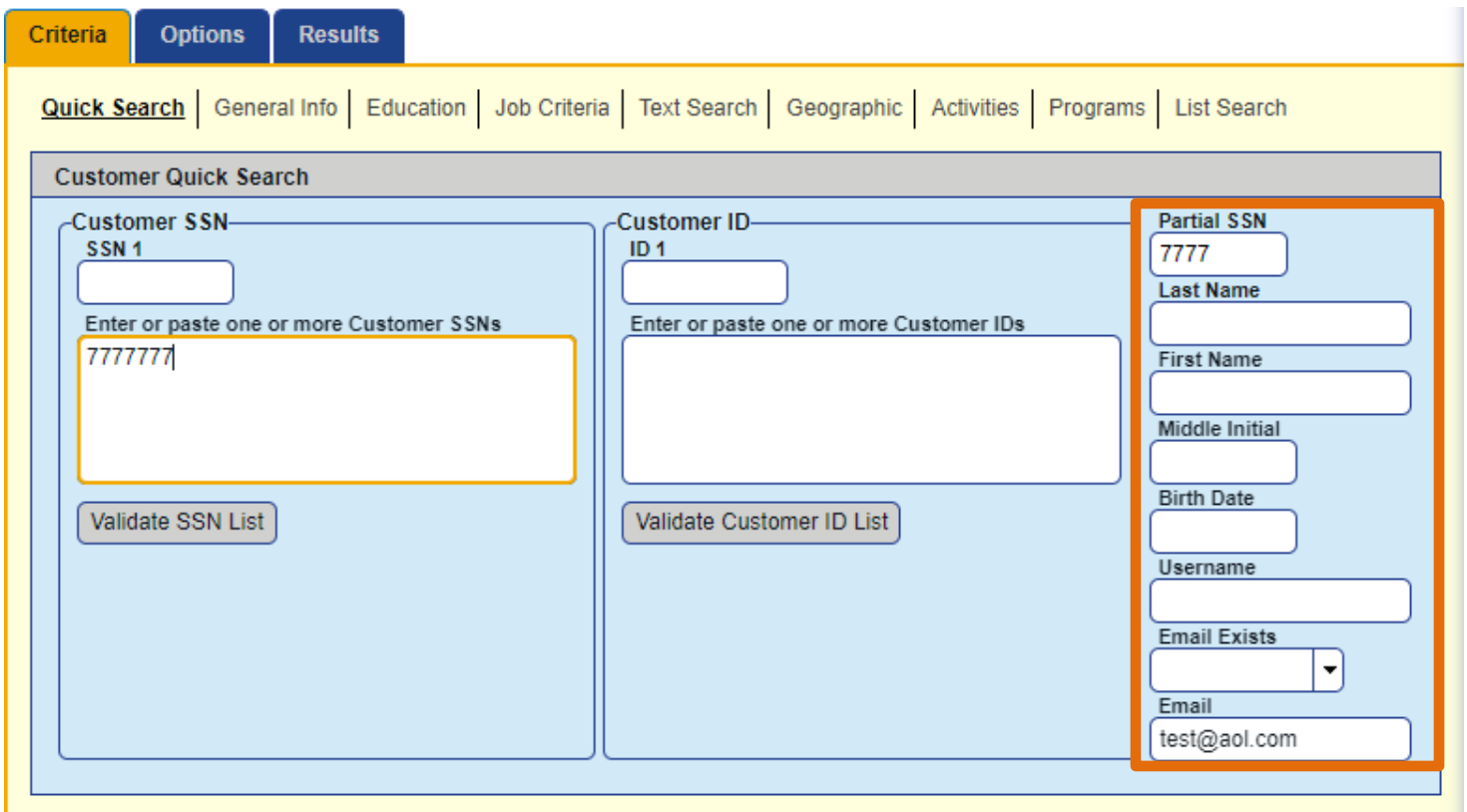
Birth date, email and partial social security number are all information commonly used to help narrow down search results.



*A **partial social security number** can be entered in the **Partial SSN** field, but staff should be aware that using this as a search criteria will prevent them from identifying a duplicate record associated with the same customer. Accordingly, this should not be a common practice.*

Each data field can be used by itself in a single criteria search. Information can be entered in more than one data field to narrow the search and provide one inclusive set of results.

After search criteria has been entered, click the **Search** button to view the result(s).



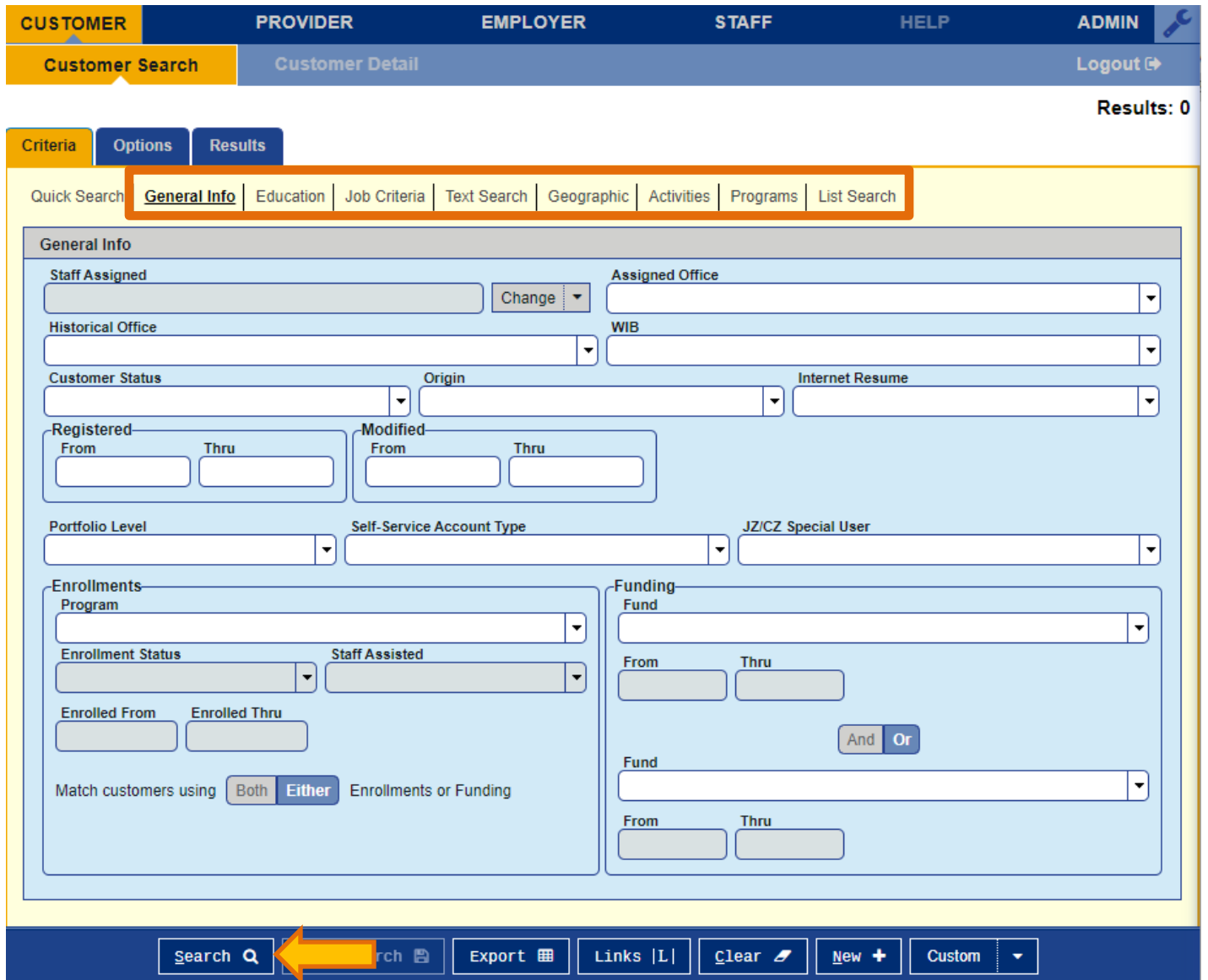

SEARCHING FOR A CUSTOMER USING THE CUSTOM SEARCH LINKS

The other links in the **Customer Search** window can be used in conjunction with the data fields in the **Quick Search** link to narrow down broad search results. They can also be used in conjunction with each other to perform more detailed searches.



These links are especially useful when staff wish to create a list of customer records all meeting specific criteria, such as customers being served by a certain office or working with a specific staff member.

The **Search** button can be clicked from any **Customer Search** link to perform a search. If information has been inputted in more than one link, the data from multiple links will be combined in a single search. If the other links are left blank, the data fields in any links can be used to run an independent search.



The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP, and ADMIN. Below these are sub-tabs: Customer Search and Customer Detail. The main content area is titled 'Results: 0' and has three sub-tabs: Criteria, Options, and Results. Under 'Criteria', there are several search links: Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, and List Search. The 'General Info' link is highlighted with an orange border. Below the links is a form with various fields for searching, including Staff Assigned, Assigned Office, Historical Office, WIB, Customer Status, Origin, Internet Resume, Registered (From/Thru), Modified (From/Thru), Portfolio Level, Self-Service Account Type, JZ/CZ Special User, Enrollments (Program, Enrollment Status, Staff Assisted, Enrolled From/Thru), and Funding (Fund, From/Thru). At the bottom, there is a search bar with a 'Search' button, which is highlighted with a yellow arrow. Other buttons include 'Export', 'Links |L|', 'Clear', 'New +', and 'Custom'.

GENERAL INFO LINK

This link allows staff to perform customer searches using less specific information. To identify customers by the staff member assigned to their record, click the **Change** button by the **Staff Assigned** data field and select the appropriate staff member from the pop-up.

To identify a customer or customers assigned to the staff member logged in, click on the **drop-down** area for the **Staff Assigned data** field and then select **Assigned to Me**.

To identify customers based on the **local office** or **Local Workforce Development Area (LWDA)** serving them, use the **drop-down arrow** on the **Assigned Office** or **WIB** data fields and select the desired location.

| CUSTOMER | PROVIDER | EMPLOYER | STAFF |
|-----------------|-----------------|----------|-------|
| Customer Search | Customer Detail | | |

Criteria Options Results

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

General Info

Staff Assigned **Change**

Historical Office WIB

Customer Status Origin

Registered From Thru Modified From Thru

Portfolio Level Self-Service Account Type JZ/CZ Sp

Enrollments Program Enrollment Status Staff Assisted

Enrolled From Enrolled Thru

Match customers using Both Either Enrollments or Funding

Funding Fund From Thru

Fund From Thru

Criteria Options Results

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

General Info

Staff Assigned **Assigned Office**

Historical Office WIB

Customer Status Origin Internet Resume



Staff can also use the **General Info** link to start a search or narrow search results based on several other criteria.

These include:

- date ranges that the customer was registered with or last served by the Workforce Development system;
- status of the customer's OSOS record;
- portfolio level and account type;
- customer enrollments and dates;
- and funding sources and dates.

The screenshot displays the OSOS Customer Search interface. At the top, there is a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, HELP, and ADMIN. Below this is a sub-navigation bar with 'Customer Search' and 'Customer Detail' tabs, and a 'Logout' link. The main content area is titled 'Results: 0' and has tabs for 'Criteria', 'Options', and 'Results'. Under 'Criteria', there is a 'Quick Search' section with links for 'General Info', 'Education', 'Job Criteria', 'Text Search', 'Geographic', 'Activities', 'Programs', and 'List Search'. The 'General Info' section is expanded, showing various search criteria:

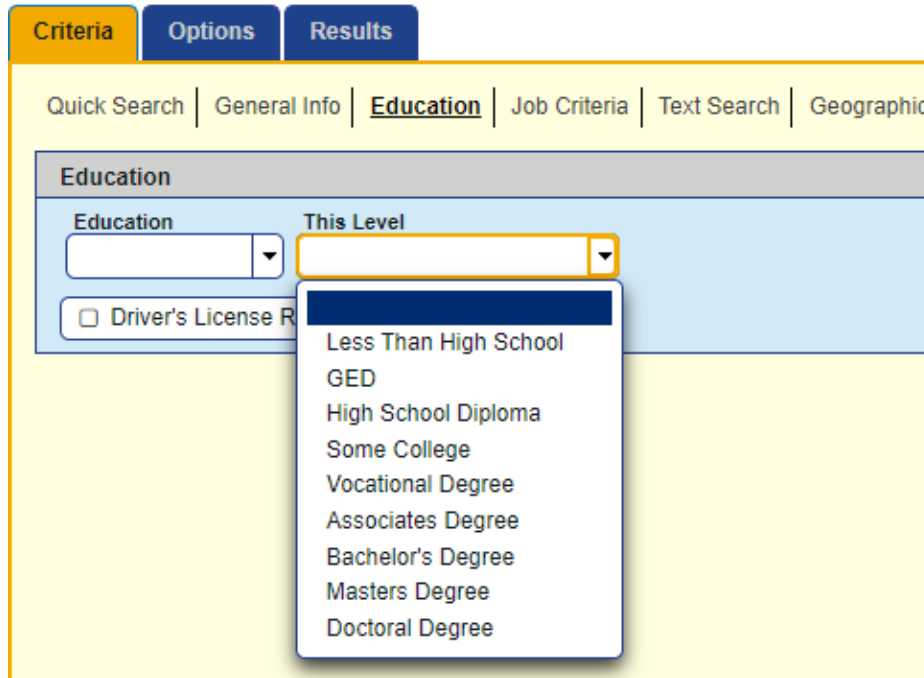
- Staff Assigned:** A text input field with a 'Change' dropdown.
- Assigned Office:** A dropdown menu.
- Historical Office:** A dropdown menu.
- Customer Status:** A dropdown menu, highlighted with an orange arrow.
- Origin:** A dropdown menu.
- Internet Resume:** A dropdown menu.
- Registered:** Two date range fields (From/Thru).
- Modified:** Two date range fields (From/Thru), highlighted with an orange arrow.
- Portfolio Level:** A dropdown menu.
- Self-Service Account Type:** A dropdown menu.
- JZ/CZ Special User:** A dropdown menu, highlighted with an orange arrow.
- Enrollments:** A section containing:
 - Program:** A dropdown menu, highlighted with an orange arrow.
 - Enrollment Status:** A dropdown menu.
 - Staff Assisted:** A dropdown menu.
 - Enrolled From/Thru:** Two date range fields.
- Funding:** A section containing:
 - Fund:** A dropdown menu.
 - From/Thru:** Two date range fields.
 - And/Or:** Two buttons.
 - Fund:** A second dropdown menu.
 - From/Thru:** A second set of date range fields.

At the bottom of the 'General Info' section, there is a 'Match customers using' section with radio buttons for 'Both' and 'Either', and the text 'Enrollments or Funding'.

SEARCHING IN THE EDUCATION LINK

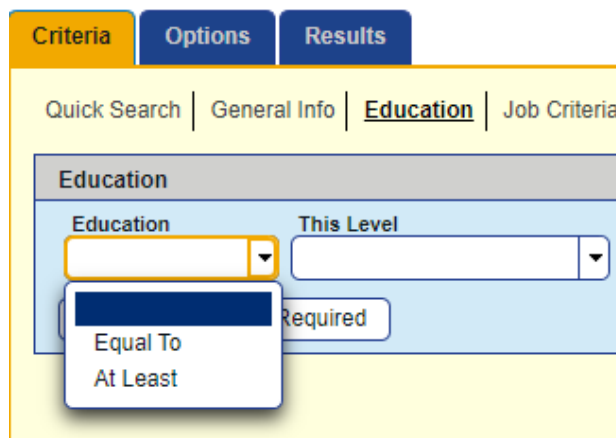
This link allows search results to be narrowed by the level of education which the customer possesses, based on the information in the customer's OSOS record.

Click the **down-drop arrow** by the This Level data field and select the appropriate level of education.



The screenshot shows the OSOS search interface with the 'Criteria' tab selected. The 'Education' section is highlighted, and the 'This Level' dropdown menu is open, displaying the following options: Less Than High School, GED, High School Diploma, Some College, Vocational Degree, Associates Degree, Bachelor's Degree, Masters Degree, and Doctoral Degree.

Click the **drop-down arrow** by the Education data field and select either **Equal To** or **At Least**. Selecting **Equal To** will narrow the search to customers with only the level of education selected. Selecting **At Least** will include all customers who have that level of education or higher. For example, a search for **At Least** an associate degree would also include customers with a bachelor's degree.



The screenshot shows the OSOS search interface with the 'Criteria' tab selected. The 'Education' section is highlighted, and the 'Education' dropdown menu is open, displaying the following options: Equal To and At Least.



To limit the search to customers possessing a driver's license, check the **Driver's License Required** box.

Once this is selected, a new box with optional data fields will appear below it.

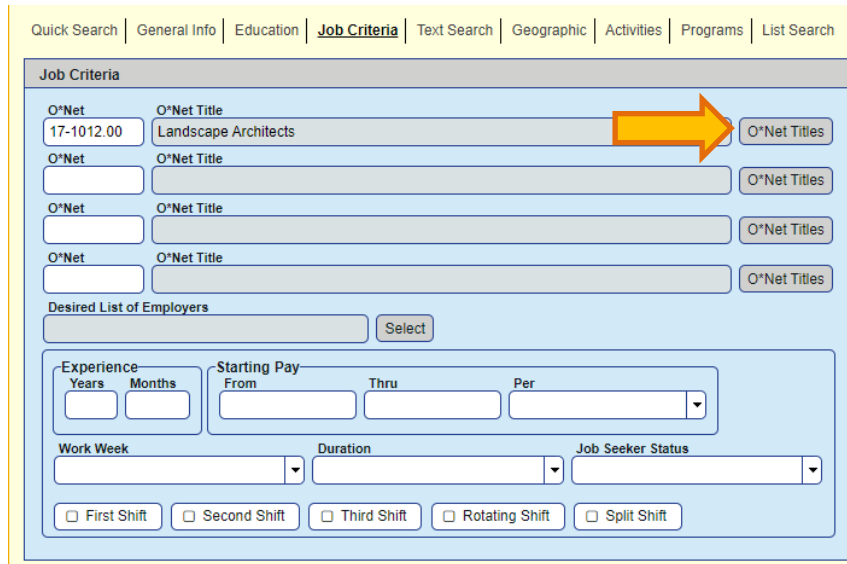
In this box, staff can specify what type of driver's license they wish to include in the search. If license details are not specified, the search will include customers possessing any driver's license class or type from any state.

The screenshot shows the 'Criteria' tab selected in the OSOS search interface. The 'Education' section is active, displaying several fields and options. A yellow arrow points to the 'This Level' dropdown menu. Below the 'Education' section, the 'Driver's License Required' checkbox is checked and highlighted with a yellow box. Underneath, there are fields for 'License State' and 'Class'. The 'Endorsements' section includes several checkboxes: 'Pass. Transport', 'Hazardous Materials', 'Tank Vehicle', 'Motorcycle', 'School Bus', 'Doubles/Triples', 'Tank Hazard', 'Air Brakes', and 'Tow Truck'.

SEARCHING IN THE JOB CRITERIA LINK

Adding **O*Net titles** into the upper portion of the **Job Criteria** link will limit search results to customers with that job title(s) indicated in the **Objective** link of their OSOS customer record.

To add titles, click on the **O*Net Titles** button and select the desired title from the **Select O*Net pop-up** window. Then click on the **Select** button at the bottom of the pop-up window to add that title. Up to four titles can be added for inclusion in a single search.



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

Job Criteria

O*Net: 17-1012.00 | O*Net Title: Landscape Architects | **O*Net Titles**

O*Net: | O*Net Title: | O*Net Titles

O*Net: | O*Net Title: | O*Net Titles

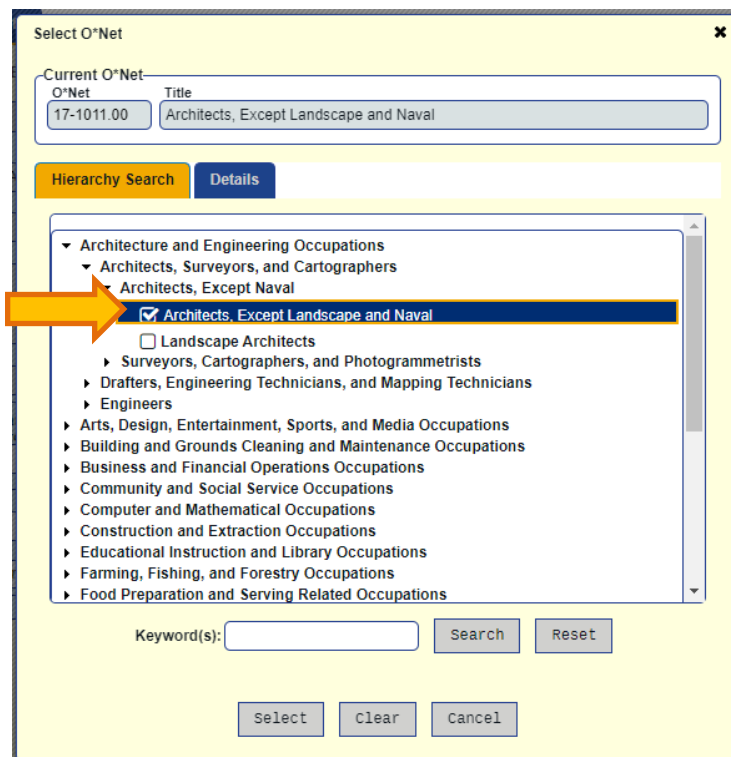
O*Net: | O*Net Title: | O*Net Titles

Desired List of Employers: | **Select**

Experience: Years: | Months: | Starting Pay: From: | Thru: | Per: |

Work Week: | Duration: | Job Seeker Status: |

First Shift | Second Shift | Third Shift | Rotating Shift | Split Shift



Select O*Net

Current O*Net: O*Net: 17-1011.00 | Title: Architects, Except Landscape and Naval

Hierarchy Search | **Details**

- ▼ Architecture and Engineering Occupations
 - ▼ Architects, Surveyors, and Cartographers
 - Architects, Except Naval
 - Architects, Except Landscape and Naval
 - Landscape Architects
 - ▶ Surveyors, Cartographers, and Photogrammetrists
 - ▶ Drafters, Engineering Technicians, and Mapping Technicians
 - ▶ Engineers
 - ▶ Arts, Design, Entertainment, Sports, and Media Occupations
 - ▶ Building and Grounds Cleaning and Maintenance Occupations
 - ▶ Business and Financial Operations Occupations
 - ▶ Community and Social Service Occupations
 - ▶ Computer and Mathematical Occupations
 - ▶ Construction and Extraction Occupations
 - ▶ Educational Instruction and Library Occupations
 - ▶ Farming, Fishing, and Forestry Occupations
 - ▶ Food Preparation and Serving Related Occupations

Keyword(s): | **Search** | **Reset**

Select | **Clear** | **Cancel**



The lower portion of the **Job Criteria** link displays a box where additional employment history information can be added to the search. Adding years or months into the **Experience** data field will limit the search to customers with at least that amount of employment experience indicated in the **Objective** link under the **Planning** tab of their OSOS record. This can be used in conjunction with the selected O*Net titles to search for customers with experience in specific job titles. If no O*Net titles have been selected, OSOS will search for customers with the specified years of employment history, regardless of what job titles they have held.

The other data fields in this box will narrow search results based on the employment and shift preferences that have been indicated in the **Add'l Info** tab of their OSOS customer record.

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

Job Criteria

O*Net: 17-1012.00 O*Net Title: Landscape Architects O*Net Titles

O*Net: O*Net Title O*Net Titles

O*Net: O*Net Title O*Net Titles

O*Net: O*Net Title O*Net Titles

Desired List of Employers: Select

Experience
 Years: Months: Starting Pay: From: Thru: Per: [v]
 Work Week: Duration: Job Seeker Status: [v]
 First Shift Second Shift Third Shift Rotating Shift Split Shift

* Desired O*Net

O*Net: 17-1012.00 O*Net Title: Landscape Architects O*Net Titles

Experience Years: 2 Experience Months:

| O*Net Title | Exp. (Months) |
|---|---------------|
| <input checked="" type="checkbox"/> Landscape Architects | 24 |
| <input type="checkbox"/> Surveyors | 24 |
| <input type="checkbox"/> Forest and Conservation Workers | 24 |
| <input type="checkbox"/> Fence Erectors | 24 |
| <input type="checkbox"/> First-Line Supervisors of Landscaping, Lawn Services, and Groundskeeping | 24 |

Add a Job Title Delete Selection Skills Custom [v]

Employment Preferences

Work Week: Full Time Duration: Regular

Salary: \$ 45000.00 Pay Unit: Yearly Date Available: 07/05/2024



SEARCHING IN THE TEXT SEARCH LINK

Staff can type in keywords in the **Text Search** link to refine search results. OSOS will cross-check with customer OSOS records to find records which include the keywords.

This search references customer record information from the **Customer Detail** window of the customer's OSOS record. **Objective Search** references the **Planning tab**, **Skills Search** references the **Skills** link on the **Resume Data** tab, and **Job Title Search** references the **Work History** link.

Job Information

| | | | |
|-----------------------------------|-------------------------------------|--|-----------|
| Job Data | | Employer Data | |
| *Job Title Landscape Architect | | *Employer New York State Office of Landscape Design | |
| O*Net Code 17-1012.00 | O*Net Title Landscape Architects | *Address 1220 Washington Ave. | Address 2 |

SEARCHING IN THE GEOGRAPHIC LINK

Staff can limit their search by entering one or more **office names, counties, or zip codes** into the **Assigned Offices, Counties, or Zip Code** data fields.

Criteria | Options | Results

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

Geographic

| | | | |
|---------------------|----------|-----------------------|--|
| Internal Use | | Customer Match | |
| Assigned Office 1 | County 1 | ZIP Code 1 | |
| Assigned Office 2 | County 2 | ZIP Code 2 | |
| Assigned Office 3 | County 3 | ZIP Code 3 | |
| Assigned Office 4 | County 4 | ZIP Code 4 | |
| Assigned Office 5 | County 5 | ZIP Code 5 | |

SEARCHING IN THE ACTIVITIES LINK

Entering Activities and Staff Name into the **Activities** section on the **Activities** link will result in a list of customers who have received a particular service from a particular staff member.

Quick Search | General Info | Education | Job Criteria | Text Search | Geographic | **Activities** | Search

Activities

Test Type: [Dropdown] Test From: [Text] Test Thru: [Text]

| | | | |
|-------------------|-------------------|--------------|--------------|
| Activities | Staff | From: [Text] | Thru: [Text] |
| [Large Empty Box] | [Large Empty Box] | | |

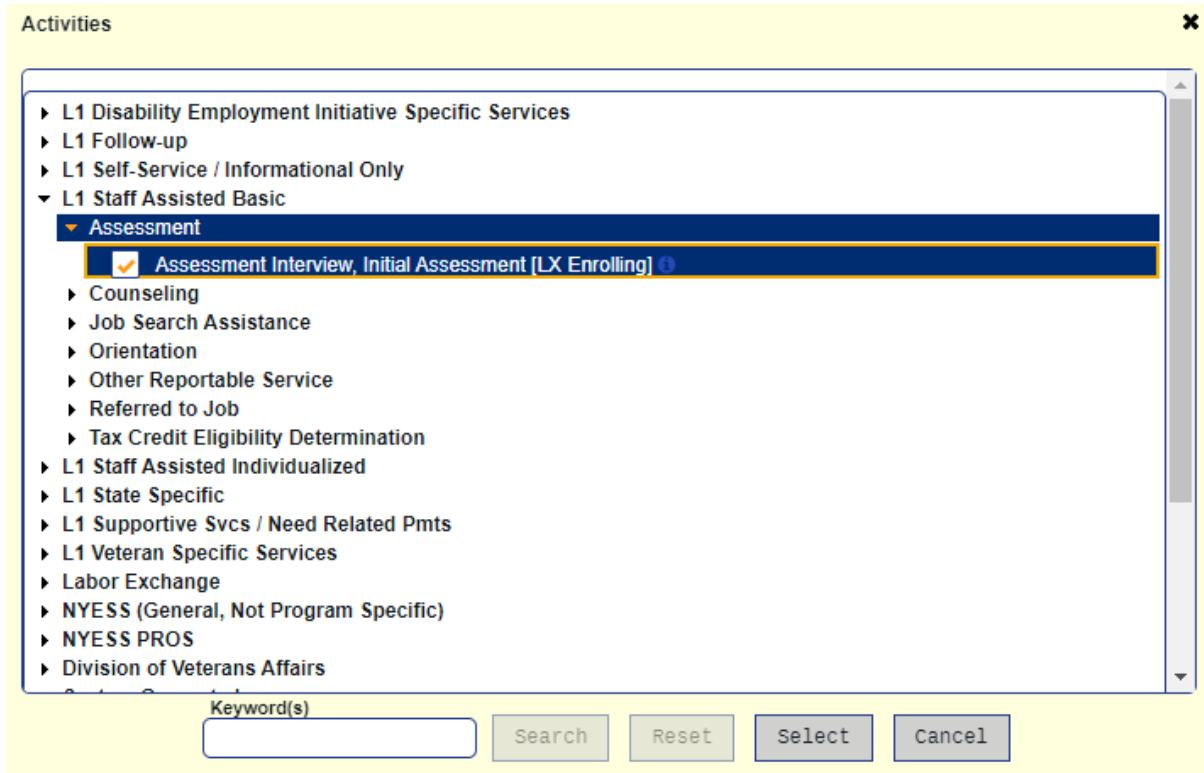
Activities [Clear] Staff [Assigned to Me] [Clear]

Literacy/Numeracy Tests

Test Exists

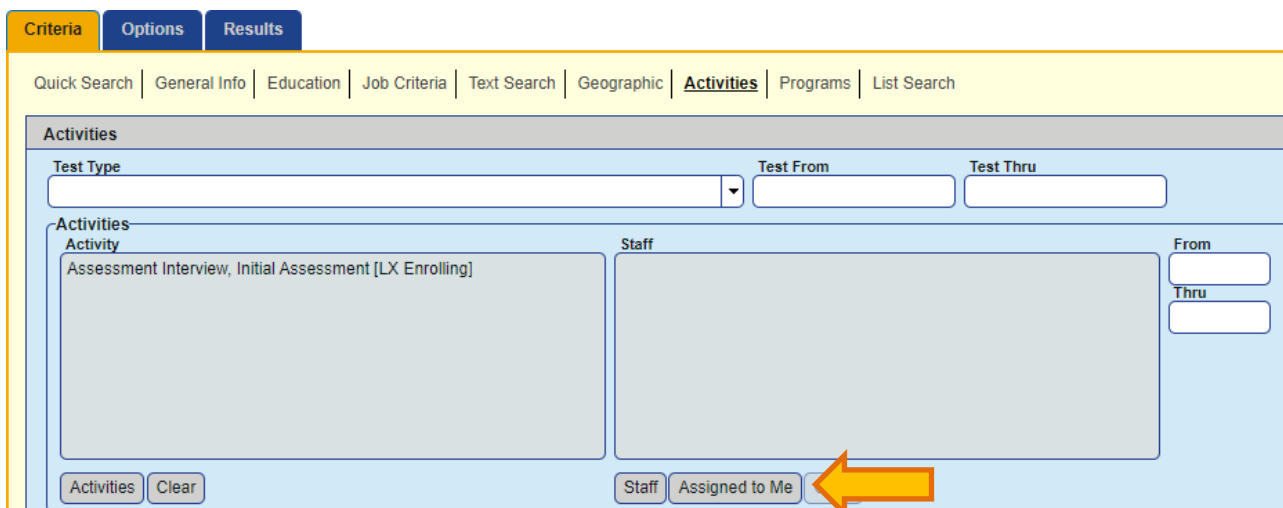
Pre-Test Date: From [Text] Thru [Text] Post-Test Date: From [Text] Thru [Text]

First, select the **activity**. Click on **Activities** and then select one or more activities from the **Activities** pop-up. Then click **Select**.



Next, click **Assigned to Me** or **Staff** to select the staff member currently logged into OSOS.

To choose a different staff member, click on the **Staff** button and select the staff member from the **Staff Assigned** pop-up window.





This search can be limited by entering the range of dates during which the activities were recorded.

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

Activities

Test Type: [Dropdown] Test From: [Text] Test Thru: [Text]

Activities: Assessment Interview, Initial Assessment [LX Enrolling]

Staff: PETITTO, FRANCIS

From: 06/24/2024
Thru: 06/24/2024

Activities [Clear] Staff [Assigned to Me] [Clear]

SEARCHING IN THE PROGRAMS LINK

The **Programs** link provides four additional sections to limit or create a search, based on the customer's OSOS record.

The data fields in the **Military Service** section can be used to add veteran-specific criteria to the search. The data fields in the **Program Qualifications** section can be used to search based on the customer's Unemployment Insurance claim status, their lower living standard status, their migrant status and/or their profile score. The data fields in the **Programs/Public Assistance** section can be used to search based on what programs the customer is enrolled in and/or which public assistance programs the customer is receiving. The data fields in the **Work History** section can be used to search for customers included in a specific Rapid Response event or Trade Adjustment Assistance petition.

Criteria | Options | Results

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

Programs

Military Service
Veteran Status: [Dropdown] Veteran Era: [Dropdown]
 Recently Separated Service Disability: [Dropdown]

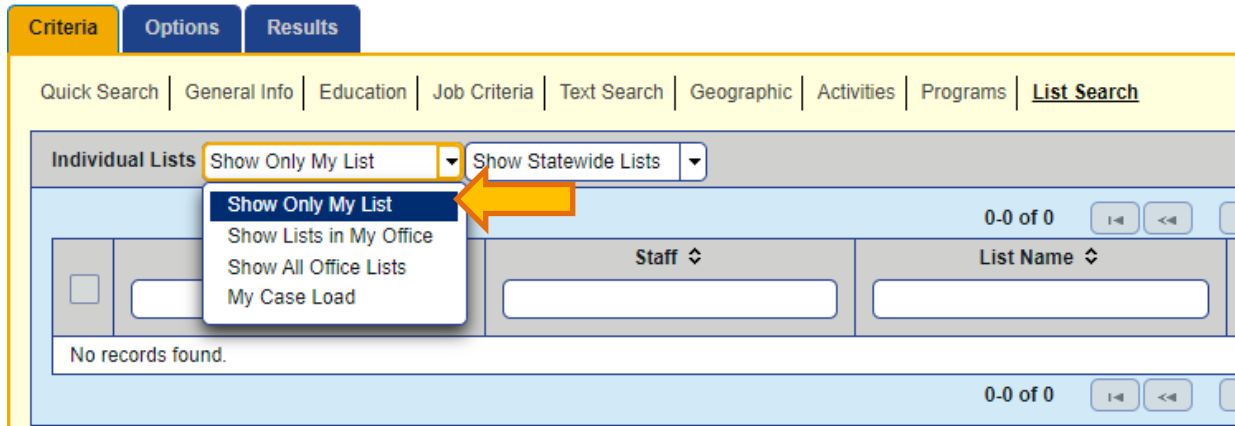
Program Qualification
UI Claimant Status: [Dropdown]
Lower Living Std: [Dropdown] Migrant Status Profiled?: [Dropdown]

Work History
Petition #: [Text]
RR Event #: [Text]

Programs/Public Assistance
Program 1: [Dropdown]
Program 2: [Dropdown]
Program 3: [Dropdown]
Program 4: [Dropdown]

SEARCHING IN THE LIST SEARCH LINK

In the **List Search** link, staff can choose to limit their search to customers who have already been added to an OSOS list. The most common use of this link is the **My Case Load** button from the drop-down menu.



Selecting this option will include only customers who have already been assigned to the staff member's OSOS case load through the use of the Add to Case Load button. This button is found in both the search results screen and in each customer's record.





Staff can also view and select other lists to be utilized in their search.

Select **Show Only My Lists**. All lists created by the staff member currently logged into OSOS will populate at the top of the screen or, select **Show Lists in My Office** instead. This will display all lists created by any staff member in the current office, which is displayed at the bottom of the screen.

Select one or more lists to be used in the search by clicking on the check boxes to the left of the list information. This will cause the search to be limited to the customers who are included in the selected lists.

The screenshot displays the OSOS List Search interface. At the top, there are tabs for 'Criteria', 'Options', and 'Results'. Below these are navigation links: 'Quick Search', 'General Info', 'Education', 'Job Criteria', 'Text Search', 'Geographic', 'Activities', 'Programs', and 'List Search'. The 'List Search' section includes two dropdown menus: 'Individual Lists' (set to 'Show Lists in My Office') and 'Show Statewide Lists'. A pagination bar shows '1-1 of 1' records, with a search count of '1' and a limit of '500'. The main table has columns for 'Office', 'Staff', 'List Name', and 'Modified'. One record is shown: 'OSOS/REOS Central Support Unit' for staff member 'NELSON, JORDAN' with a 'Training Test' list, modified on '02/09/2024'. A 'Yes' checkbox is visible in the final column. A second pagination bar is also present. At the bottom, a footer indicates 'When searching, retrieve records found in Any List(s) selected' and provides buttons for 'Search', 'Save Search', 'Export', 'Links |L|', 'Clear', 'New +', and 'Cust'.

| | Office | Staff | List Name | Modified | |
|--------------------------|--------------------------------|----------------|---------------|------------|-----|
| <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | OSOS/REOS Central Support Unit | NELSON, JORDAN | Training Test | 02/09/2024 | Yes |



RESOURCES AND ASSISTANCE

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: help.osos@labor.ny.gov