

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:

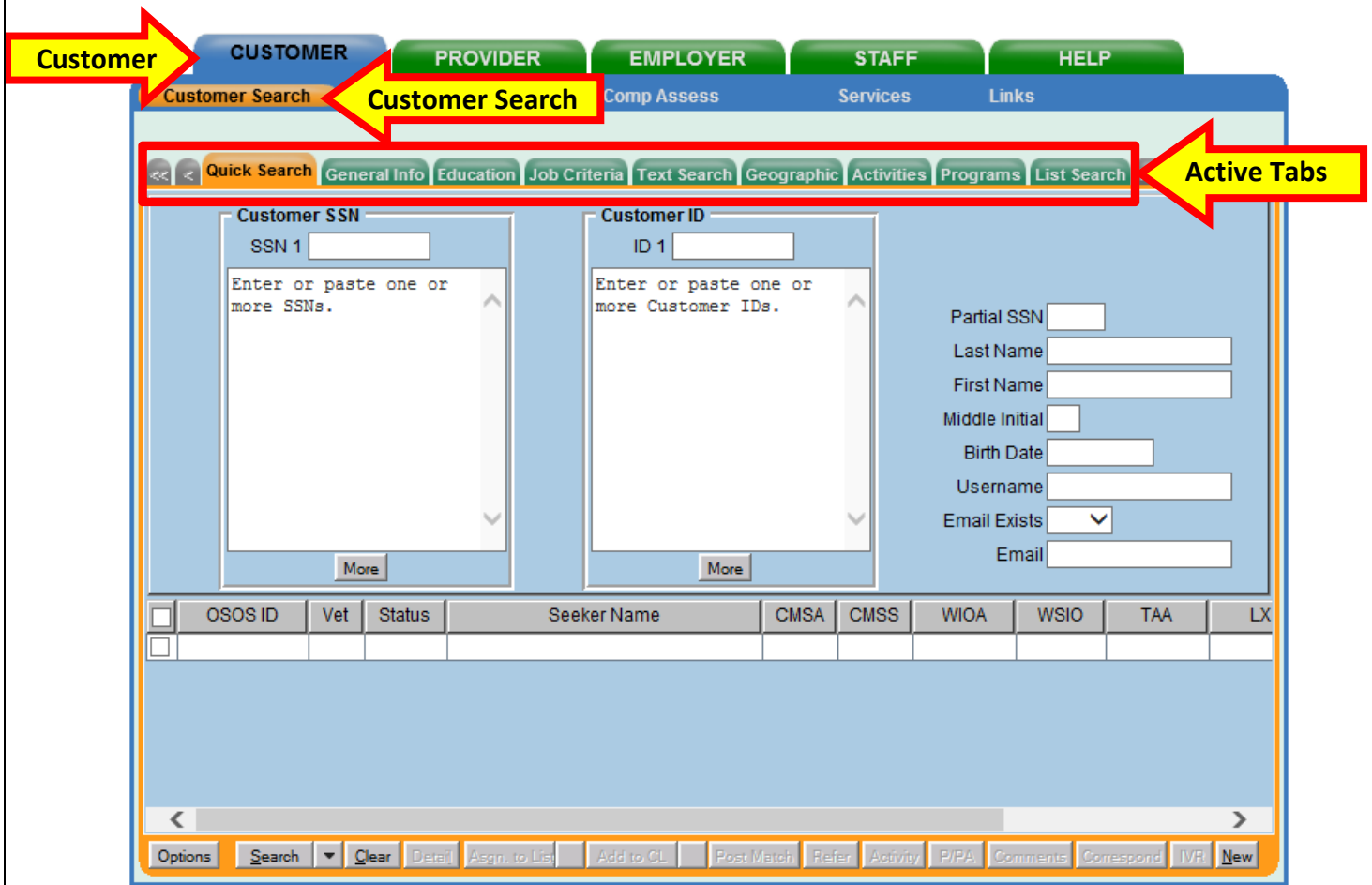
- Using, customizing and saving Search Options
- Searching in the Quick Search tab
- Searching in each of the Customer Search tabs

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.

While searches are most commonly performed from the **Quick Search** tab, any of the active tabs can be used in the search process.



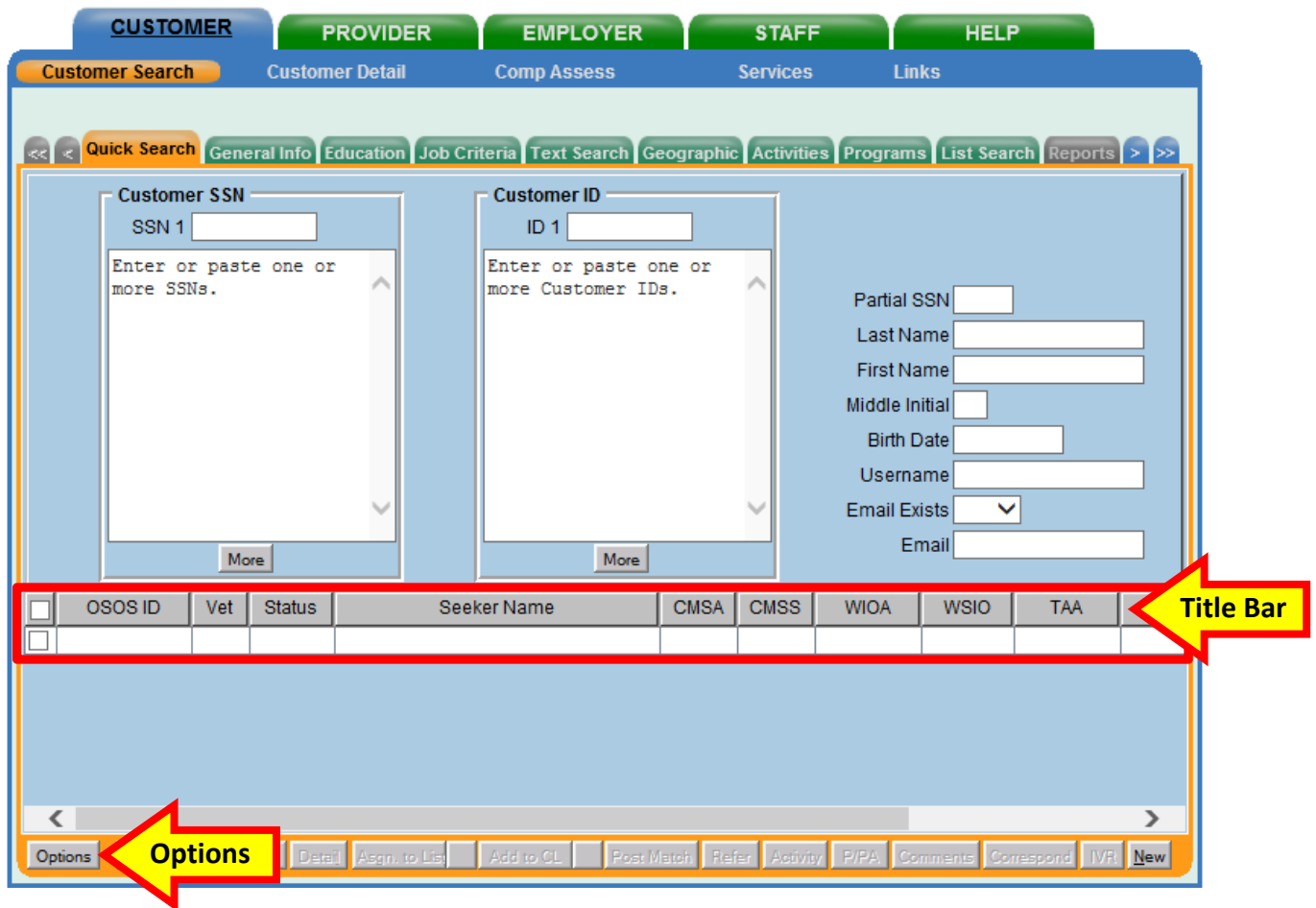
The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: **CUSTOMER**, **PROVIDER**, **EMPLOYER**, **STAFF**, and **HELP**. Below these are sub-tabs: **Customer Search**, **Comp Assess**, **Services**, and **Links**. A yellow arrow points to the **Customer** tab, and another points to the **Customer Search** sub-tab. Below the sub-tabs is a row of search tabs: **Quick Search**, **General Info**, **Education**, **Job Criteria**, **Text Search**, **Geographic**, **Activities**, **Programs**, and **List Search**. A red box highlights these tabs, with a yellow arrow pointing to it labeled **Active Tabs**. The main search area contains two large text input fields: **Customer SSN** (with sub-field **SSN 1**) and **Customer ID** (with sub-field **ID 1**). Below these are smaller input fields for **Partial SSN**, **Last Name**, **First Name**, **Middle Initial**, **Birth Date**, **Username**, **Email Exists** (a dropdown menu), and **Email**. At the bottom, there is a table with columns: **OSOS ID**, **Vet**, **Status**, **Seeker Name**, **CMSA**, **CMSS**, **WIOA**, **WSIO**, **TAA**, and **LX**. Below the table is a search bar with buttons for **Options**, **Search**, **Clear**, **Detail**, **Asgn. to List**, **Add to CL**, **Post Match**, **Refer**, **Activity**, **P/PA**, **Comments**, **Correspond**, **IVR**, and **New**.

SEARCH OPTIONS

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

The gray title bar in the **Customer Search** window 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** button at the bottom left of the screen.



The screenshot shows the OSOS Customer Search window. At the top, there are navigation tabs: CUSTOMER (selected), PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search (selected), Customer Detail, Comp Assess, Services, and Links. A secondary set of tabs includes Quick Search (selected), General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, and Reports. The main search area contains two large text input fields for 'Customer SSN' and 'Customer ID', each with a 'More' button below it. To the right of these fields are several smaller input fields: Partial SSN, Last Name, First Name, Middle Initial, Birth Date, Username, Email Exists (a dropdown menu), and Email. Below the search area is a table with columns: OSOS ID, Vet, Status, Seeker Name, CMSA, CMSS, WIOA, WSIO, and TAA. A red arrow points to the table header with the label 'Title Bar'. At the bottom of the window, there is a row of buttons: Options (highlighted with a red arrow and the label 'Options'), Detail, Assign to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.



The **Customer Search Result Columns** pop-up window displays all the fields that can be added to the title bar. These fields can be selected or de-selected by clicking on the checkbox 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.



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.

However, staff should 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.

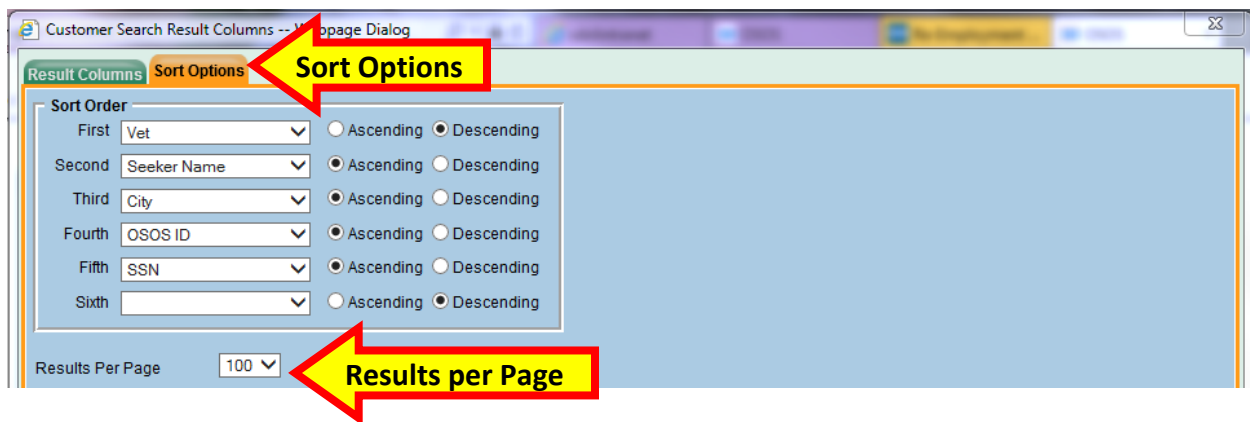
<input type="checkbox"/> Chronic Health	--Employment Objective--
<input type="checkbox"/> Individual With A Disability Received Benefit Planning Services	<input checked="" type="checkbox"/> Empl. Objective 8
<input type="checkbox"/> Individual With A Disability Received Financial Capability / Asset Development Services	<input type="checkbox"/> Desired Job Title
--Military / Selective Service--	<input type="checkbox"/> Add'l Skills Text
<input type="checkbox"/> Service Veteran	<input type="checkbox"/> No Work Hist Info Provided
<input type="checkbox"/> Vet Status	<input type="checkbox"/> No School Info Provided
<input type="checkbox"/> Veteran Era	<input type="checkbox"/> No Lic/Cert Info Provided
<input type="checkbox"/> Service From	<input type="checkbox"/> No Prof Assoc Info Provided
<input type="checkbox"/> Service Thru	--Drivers License--
<input type="checkbox"/> Current Housing	<input checked="" type="checkbox"/> Driver Flag 9
<input type="checkbox"/> Current Housing (2)	<input type="checkbox"/> License Class
<input type="checkbox"/> Service Disability	<input type="checkbox"/> License State
<input type="checkbox"/> Campaign Veteran	<input type="checkbox"/> Air Brakes
<input type="checkbox"/> In Country	<input type="checkbox"/> School Bus
<input type="checkbox"/> Type	<input type="checkbox"/> Motorcycle
<input type="checkbox"/> Branch	<input type="checkbox"/> Doubles/Triples
<input type="checkbox"/> Other Barriers to Employment?	<input type="checkbox"/> Haz. Materials
<input type="checkbox"/> Selective Service?	<input type="checkbox"/> Pass Transport
<input type="checkbox"/> Selective Service #	<input type="checkbox"/> Tank Vehicle
--Employment Preferences--	<input type="checkbox"/> Tank Hazard
<input checked="" type="checkbox"/> Work Week 6	
<input checked="" type="checkbox"/> Duration 7	
<input type="checkbox"/> Salary	
<input type="checkbox"/> Pay Unit	
<input type="checkbox"/> Norm. Salary	
<input type="checkbox"/> Date Available	
<input type="checkbox"/> First Shift	
<input type="checkbox"/> Second Shift	
<input type="checkbox"/> Third Shift	
<input type="checkbox"/> Split Shift	

--Military / Selective Service--
<input type="checkbox"/> Service Veteran
<input checked="" type="checkbox"/> Vet Status 4
<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 5
<input checked="" type="checkbox"/> Other Barriers to Employment? 6
<input type="checkbox"/> Selective Service?
<input type="checkbox"/> Selective Service #

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

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.

Seeker 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 full 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, staff can use the Results Per Page drop-down menu to set how many results can be returned in a single screen.



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 **Set As My Default** checkbox and then click the **Save** 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

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

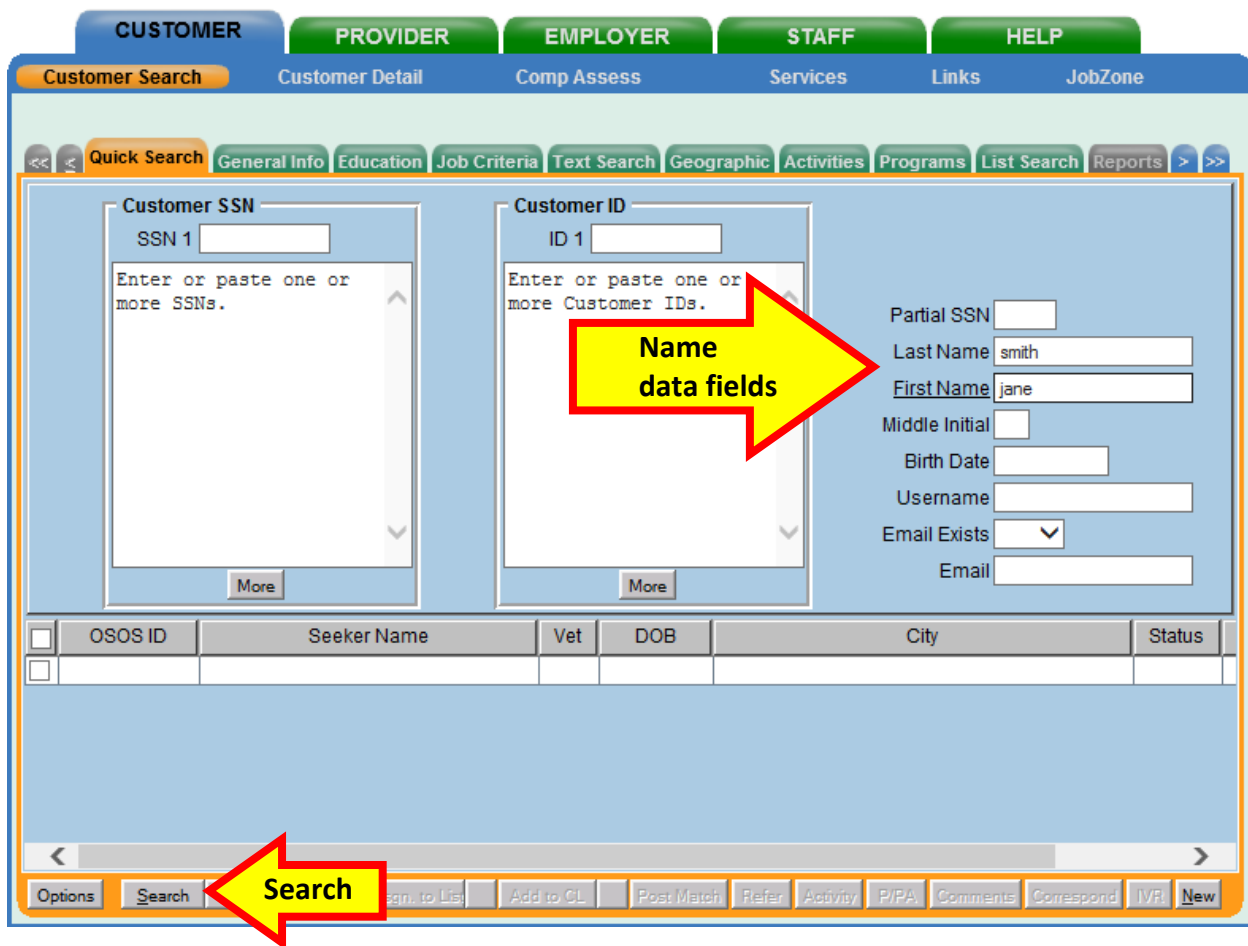
SEARCHING BY NAME

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.



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](#).

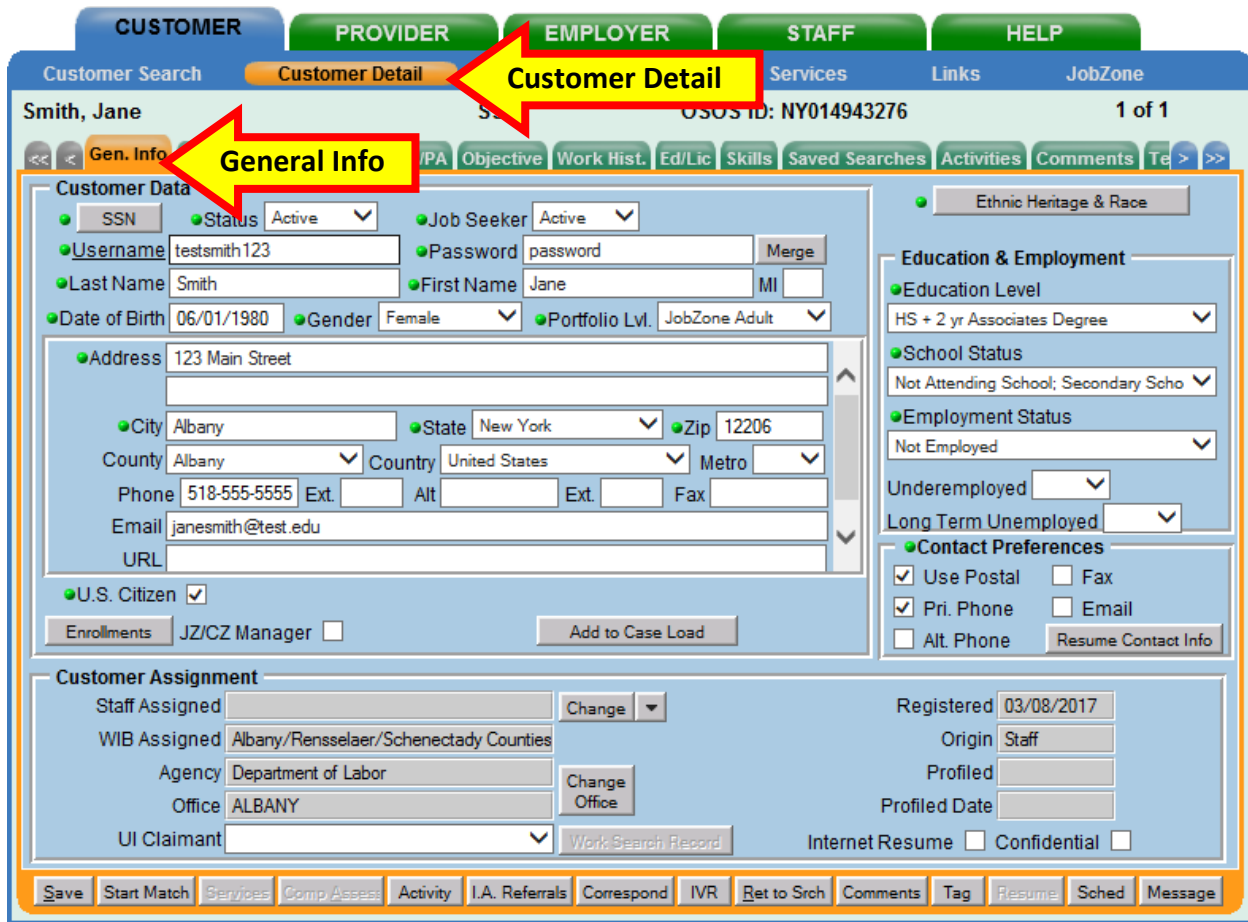
Click the **Search** button.



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 'Quick Search' sub-tab is selected, showing options for General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, and Reports. The main search area contains two large text input fields: 'Customer SSN' (with a sub-field 'SSN 1') and 'Customer ID' (with a sub-field 'ID 1'). Both fields have a 'More' button below them. To the right of these fields are several smaller input fields: 'Partial SSN', 'Last Name' (containing 'smith'), 'First Name' (containing 'jane'), 'Middle Initial', 'Birth Date', 'Username', 'Email Exists' (a dropdown menu), and 'Email'. A red arrow points from the 'Name data fields' label to the 'Last Name' and 'First Name' fields. At the bottom of the interface, there is a 'Search' button, which is also highlighted with a red arrow. Below the search area is a table with columns for OSOS ID, Seeker Name, Vet, DOB, City, and Status. The table is currently empty.

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**

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

Smith, Jane | OSOS ID: NY014943276 | 1 of 1

<< < **Gen. Info** | IPA | Objective | Work Hist. | Ed/Lic | Skills | Saved Searches | Activities | Comments | Te > >>

Customer Data

- SSN: []
- Status: Active
- Job Seeker: Active
- Username: testsmith123
- Password: password
- Last Name: Smith
- First Name: Jane
- Date of Birth: 06/01/1980
- Gender: Female
- Portfolio Lvl.: JobZone Adult
- Address: 123 Main Street
- City: Albany
- State: New York
- Zip: 12206
- County: Albany
- Country: United States
- Phone: 518-555-5555
- Email: janesmith@test.edu
- U.S. Citizen:

Education & Employment

- Education Level: HS + 2 yr Associates Degree
- School Status: Not Attending School; Secondary Scho
- Employment Status: Not Employed
- Contact Preferences:
 - Use Postal: | Fax:
 - Pri. Phone: | Email:
 - Alt. Phone: | Resume Contact Info:

Customer Assignment

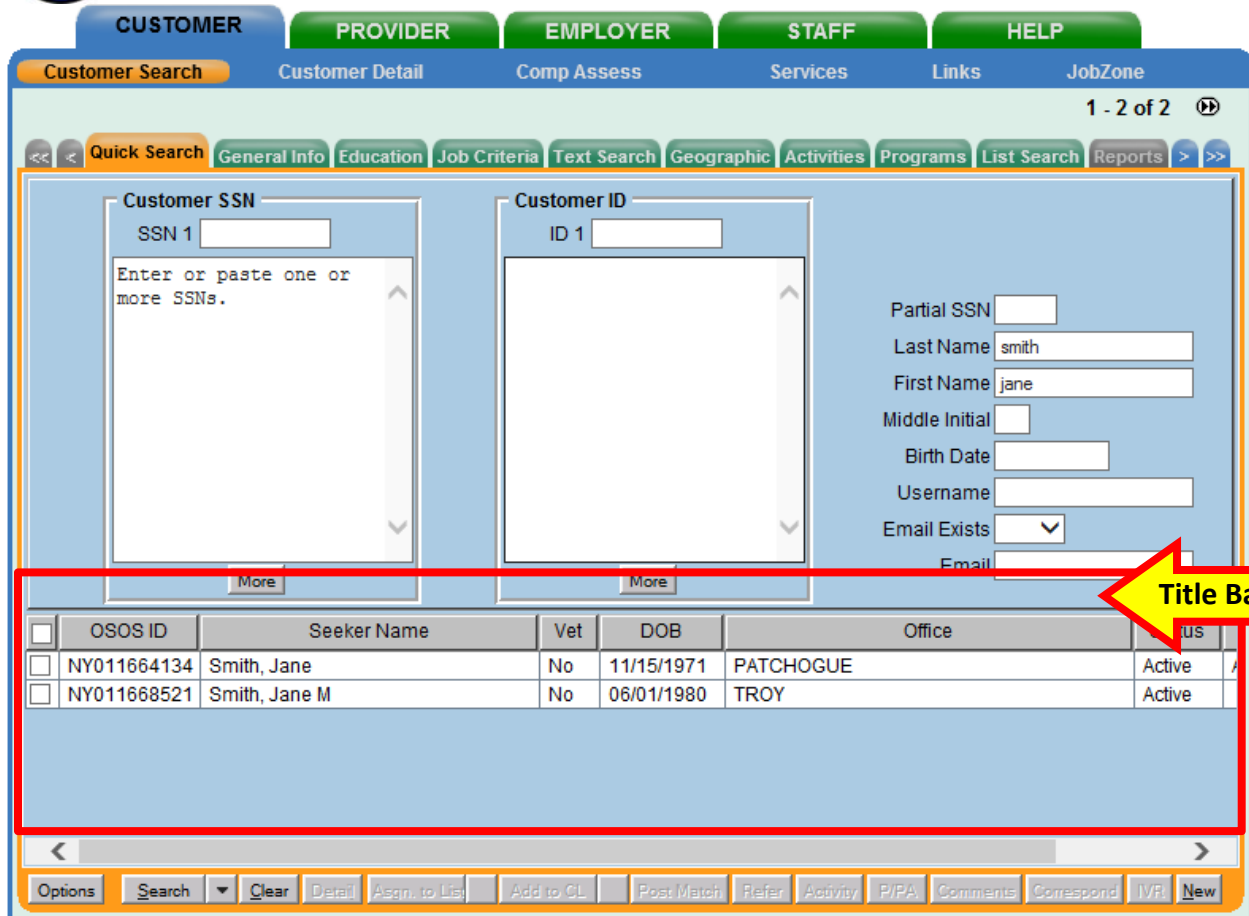
- Staff Assigned: []
- WIB Assigned: Albany/Rensselaer/Schenectady Counties
- Agency: Department of Labor
- Office: ALBANY
- UI Claimant: []
- Registered: 03/08/2017
- Origin: Staff
- Profiled: []
- Profiled Date: []
- Internet Resume: | Confidential:

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

If there is more than one customer record matching the search criteria, the customers' information will be displayed in the window below the data entry fields.



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

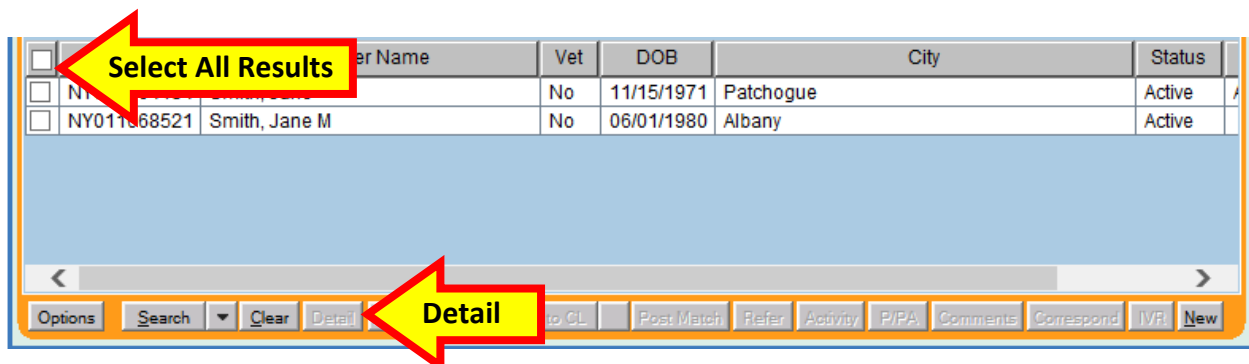


The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The search criteria section includes fields for Customer SSN (SSN 1), Customer ID (ID 1), Partial SSN, Last Name (smith), First Name (jane), Middle Initial, Birth Date, Username, Email Exists, and Email. Below the search criteria is a table with the following data:

<input type="checkbox"/>	OSOS ID	Seeker Name	Vet	DOB	Office	Status
<input type="checkbox"/>	NY011664134	Smith, Jane	No	11/15/1971	PATCHOGUE	Active
<input type="checkbox"/>	NY011668521	Smith, Jane M	No	06/01/1980	TROY	Active

A red box highlights the table's title bar, and a yellow arrow points to it with the label "Title Bar".

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.



The screenshot shows the OSOS Customer Search interface with the results table. The checkbox in the top left corner of the table's title bar is selected. The 'Detail' button at the bottom of the screen is highlighted. A yellow arrow points to the checkbox with the label "Select All Results", and another yellow arrow points to the 'Detail' button with the label "Detail".



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.

The screenshot displays the OSOS Customer Detail interface for Jane Smith. 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 CareerZone. The main header displays the customer's name (Smith, Jane), SSN, and OSOS ID (NY01), along with a 'Toggle Arrows' icon and a page indicator '1 of 4'. A secondary navigation bar contains tabs for Gen. Info, Eligibility, Add'l Info, Pgms/PA, Objective, Work Hist., Ed/Lic, Skills, Saved Searches, Activities, and Comments. The main content area is divided into several sections: Customer Data (with fields for SSN, Status, Job Seeker, Username, Password, Last Name, First Name, Date of Birth, Gender, Portfolio Lvl, Address, City, State, Zip, County, Country, Metro, Phone, Email, and URL), Ethnic Heritage & Race, Education & Employment (with fields for Education Level, School Status, and Employment Status), and Contact Preferences (with checkboxes for Use Postal, Fax, Pri. Phone, Email, and Alt. Phone). Below these sections is the Customer Assignment area, which includes fields for Staff Assigned, WIB Assigned, Agency, Office, and UI Claimant, along with buttons for Change, Change Office, and Work Search Record. At the bottom of the screen, there is a row of buttons for Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.



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 NUMBER

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



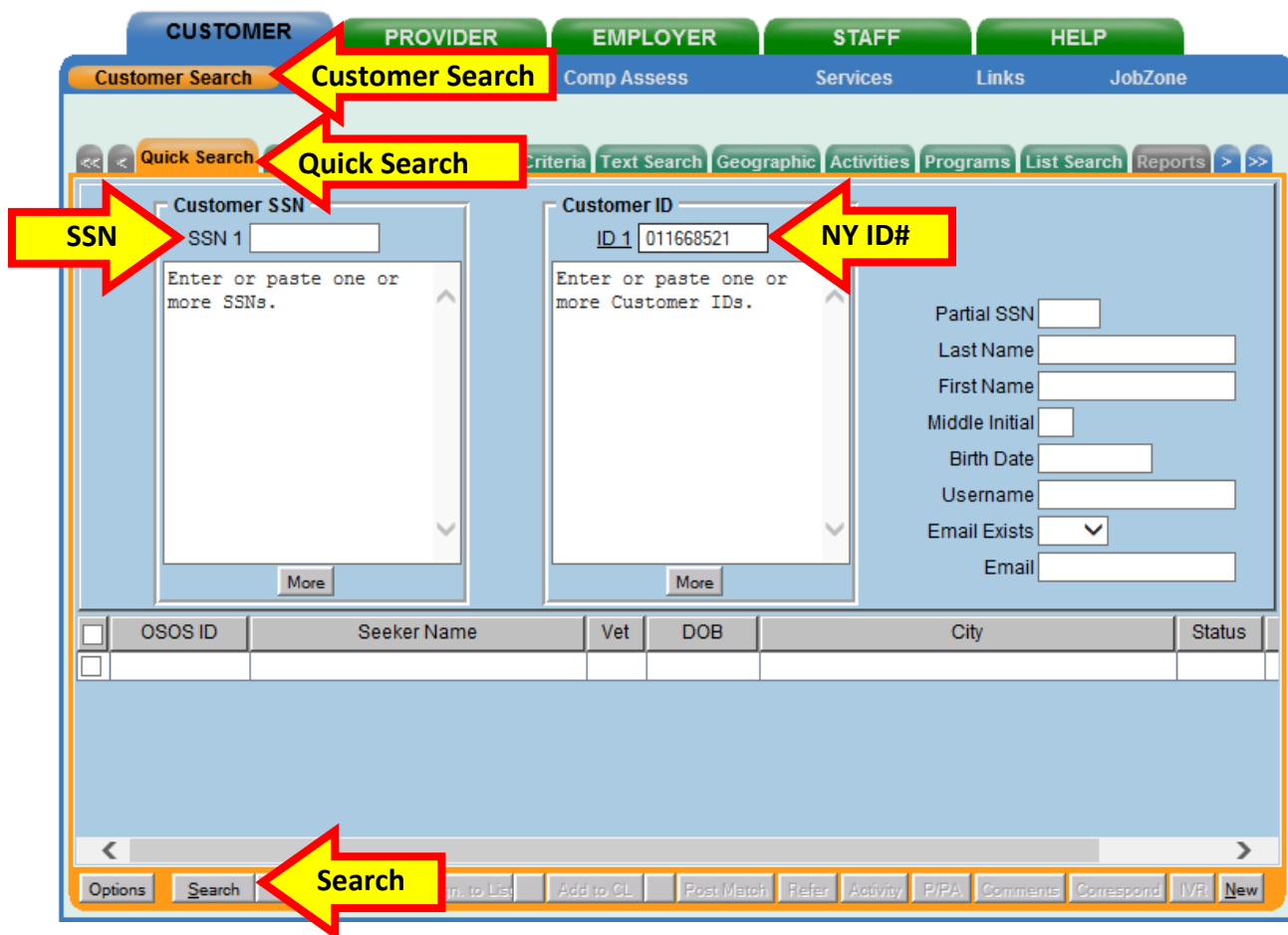
*This should **not** be done the first time staff is searching for a customer record. It may be done subsequently, after a name search has already been performed to check for duplicate records.*

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** box. It is not necessary to include "NY" at the beginning of the number.

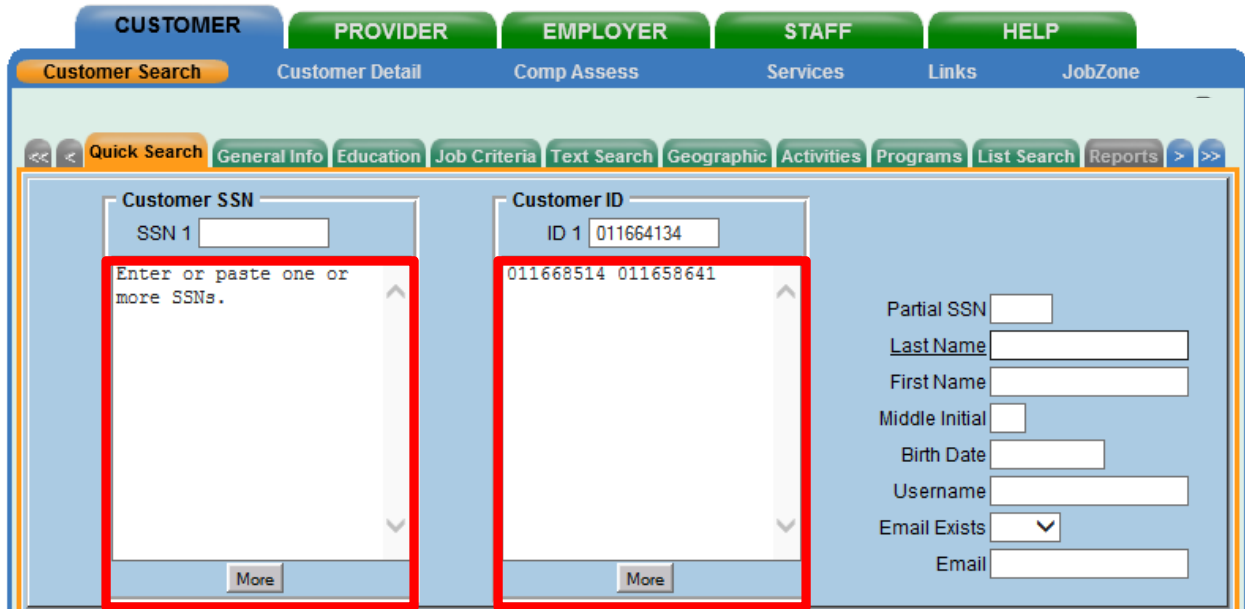
Click the **Search** button at the bottom of the screen or press the Enter button on the keyboard.

If only one ID number has been entered, OSOS will display the customer's record.

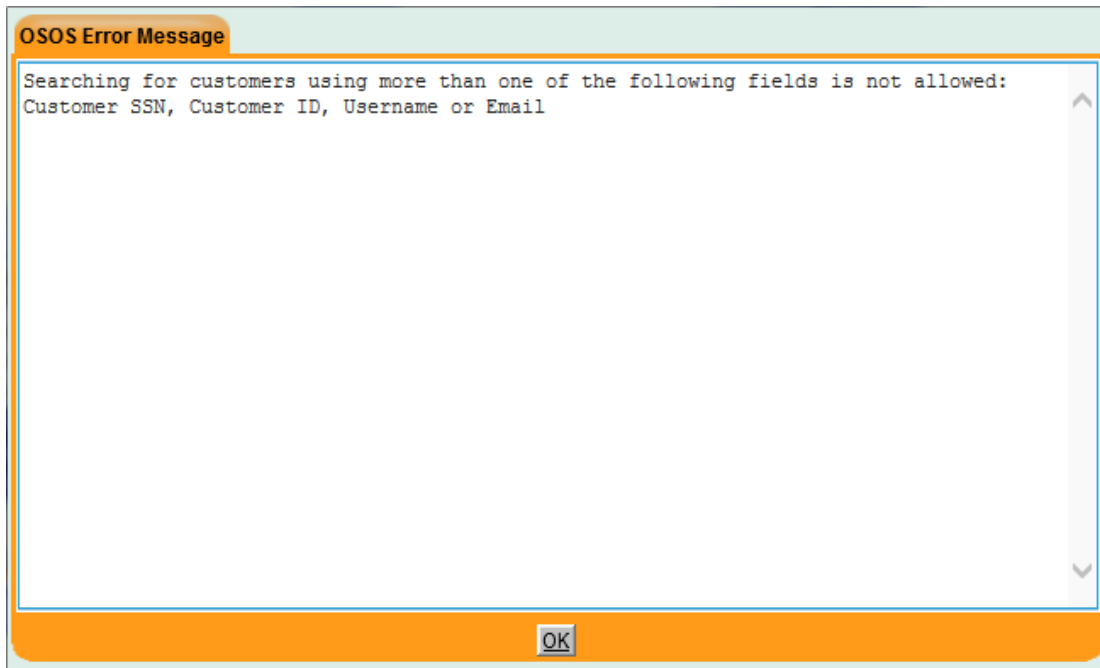


The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Comp Assess, Services, Links, and JobZone. The main search area includes a 'Quick Search' tab and several search criteria: Text Search, Geographic, Activities, Programs, List Search, and Reports. The 'Customer SSN' section has a field for 'SSN 1' with a 'More' button below it. The 'Customer ID' section has a field for 'ID 1' containing the value '011668521' and a 'More' button below it. To the right of these sections are fields for 'Partial SSN', 'Last Name', 'First Name', 'Middle Initial', 'Birth Date', 'Username', 'Email Exists' (a dropdown menu), and 'Email'. At the bottom, there is a table with columns: OSOS ID, Seeker Name, Vet, DOB, City, and Status. Below the table is a 'Search' button and other action buttons like 'Add to CL', 'Post Match', 'Refer', 'Activity', 'P/PA', 'Comments', 'Correspond', 'IVR', and 'New'.

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.



ADDITIONAL SEARCH CRITERIA IN THE QUICK SEARCH TAB

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

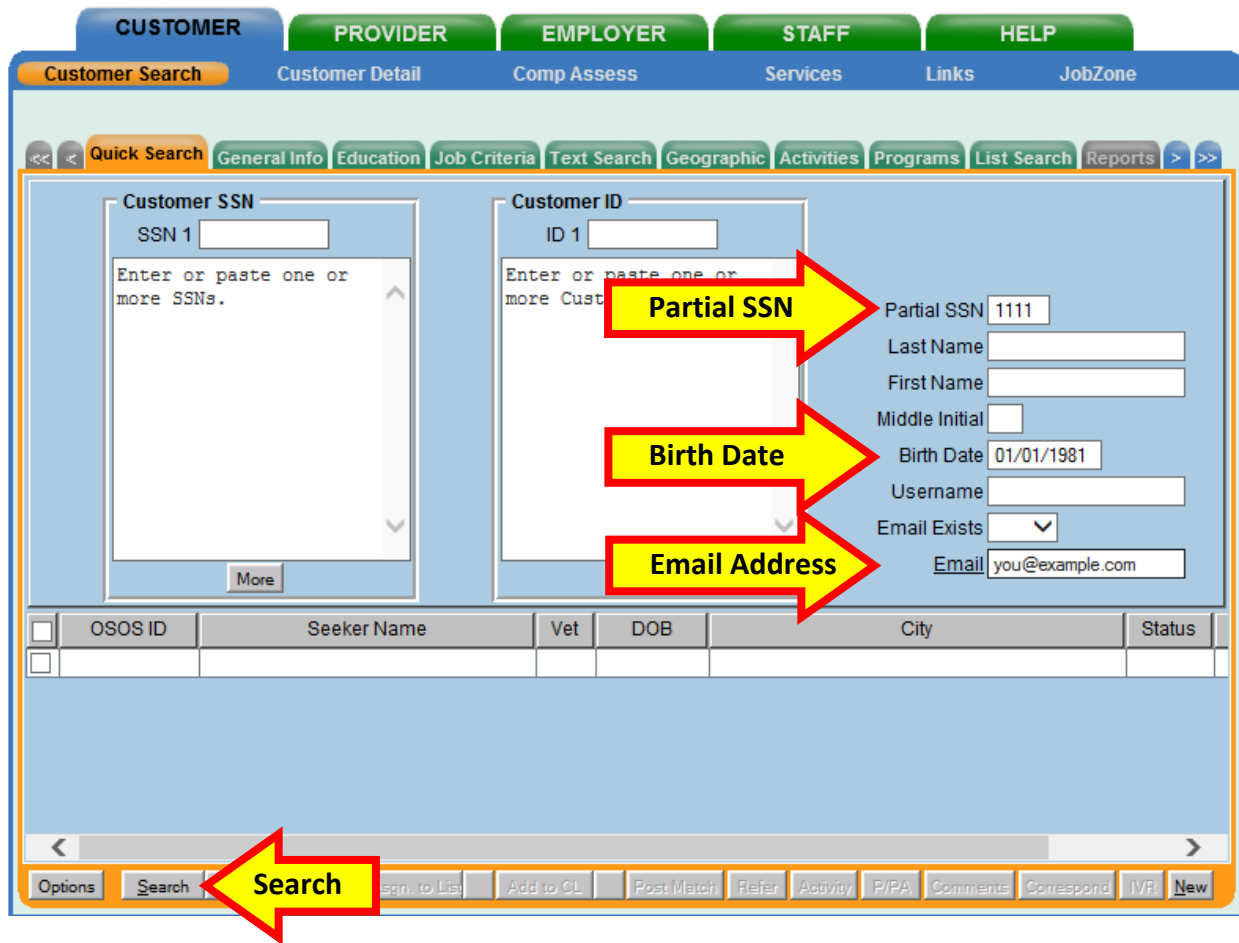
Birth date, email and partial social security number are all information commonly used to help narrow down search results.



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).



The screenshot shows the OSOS Quick Search interface. At the top, there are navigation tabs: CUSTOMER (selected), PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search (selected), Customer Detail, Comp Assess, Services, Links, and JobZone. The main search area has a 'Quick Search' tab selected, with other tabs like General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, and Reports. The search form includes fields for Customer SSN (SSN 1), Customer ID (ID 1), Partial SSN (1111), Last Name, First Name, Middle Initial, Birth Date (01/01/1981), Username, Email Exists (dropdown), and Email (you@example.com). A table below the form has columns for OSOS ID, Seeker Name, Vet, DOB, City, and Status. At the bottom, there is a 'Search' button highlighted with a red arrow, along with other buttons like Options, Search, Add to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

SEARCHING IN THE CUSTOMER SEARCH TABS

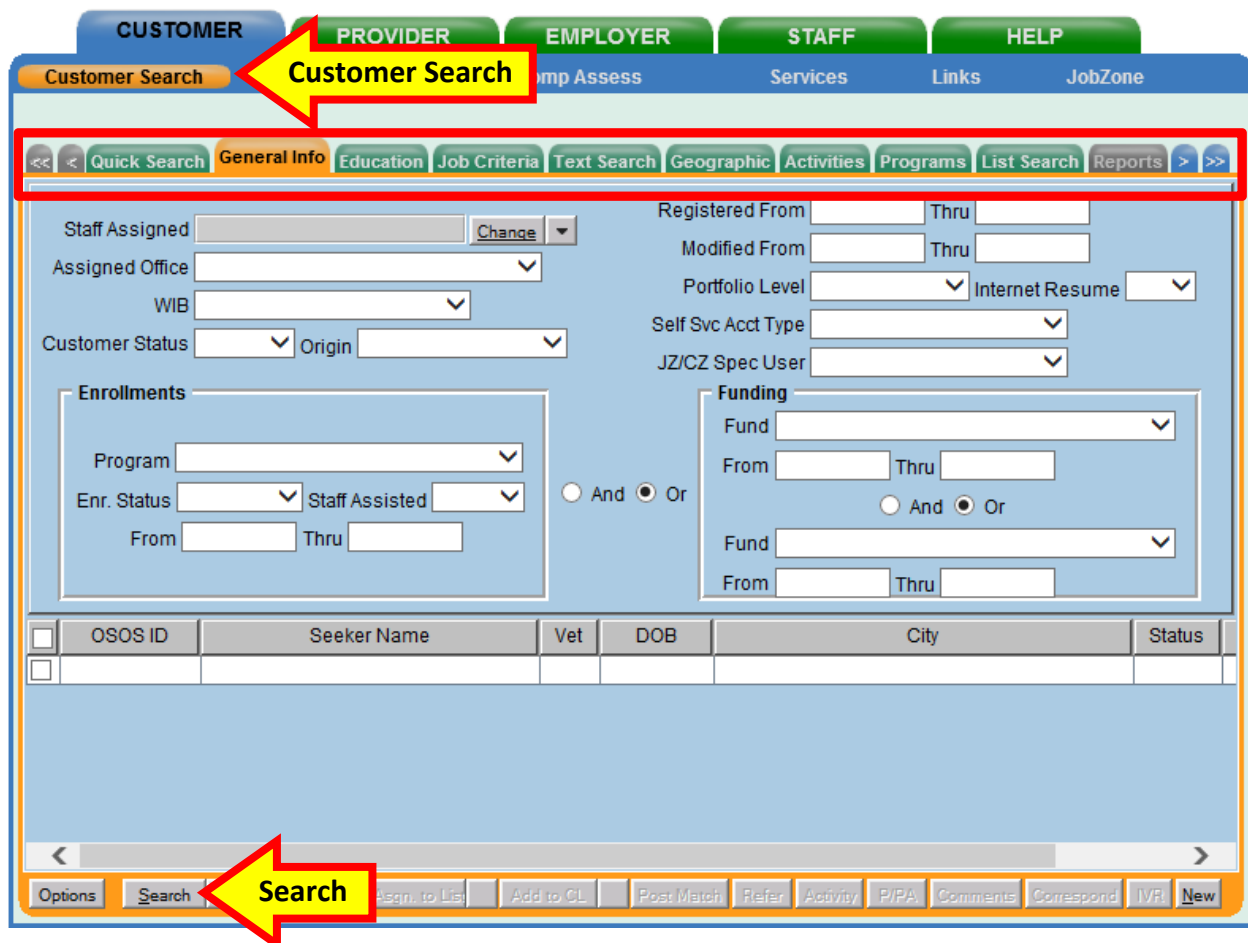
The other tabs in the **Customer Search** window can be used in conjunction with the data fields in the **Quick Search** tab to narrow down broad search results. They can also be used in conjunction with each other to perform more detailed searches.



These tabs 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** tab to perform a search. If information has been inputted in more than one tab, the data from multiple tabs will be combined in a single search.

If the other tabs are left blank, the data fields in any tab can be used to run an independent search.



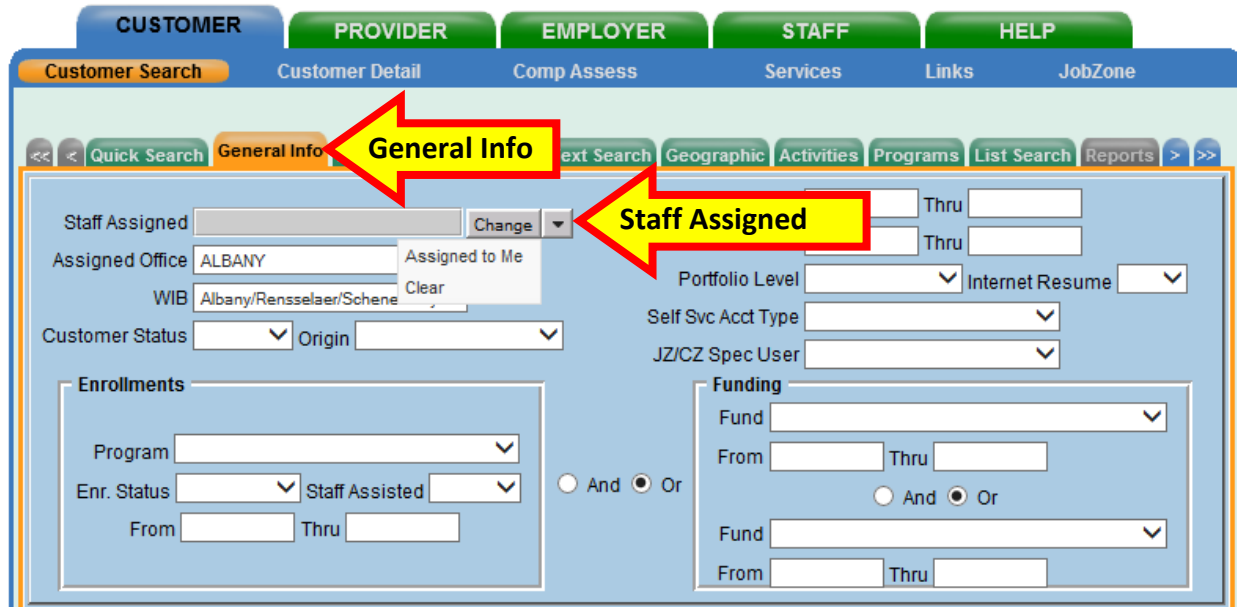
The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The CUSTOMER tab is active, and a yellow arrow points to the 'Customer Search' label. Below the tabs, there are sub-tabs: Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, and Reports. A red box highlights the Quick Search sub-tab and its associated search fields. The search fields include: Staff Assigned (with a Change dropdown), Assigned Office (dropdown), WIB (dropdown), Customer Status (dropdown), Origin (dropdown), Registered From (date field) Thru (date field), Modified From (date field) Thru (date field), Portfolio Level (dropdown), Internet Resume (dropdown), Self Svc Acct Type (dropdown), JZ/CZ Spec User (dropdown), Enrollments (Program dropdown, Enr. Status dropdown, Staff Assisted dropdown, From date field, Thru date field), and Funding (Fund dropdown, From date field, Thru date field). Below the search fields is a table with columns: OSOS ID, Seeker Name, Vet, DOB, City, and Status. At the bottom, there is a Search button highlighted with a yellow arrow, and other buttons: Options, Sign. to LIS, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

SEARCHING IN THE GENERAL INFO TAB

This tab allows staff to perform customer searches using less specific information.

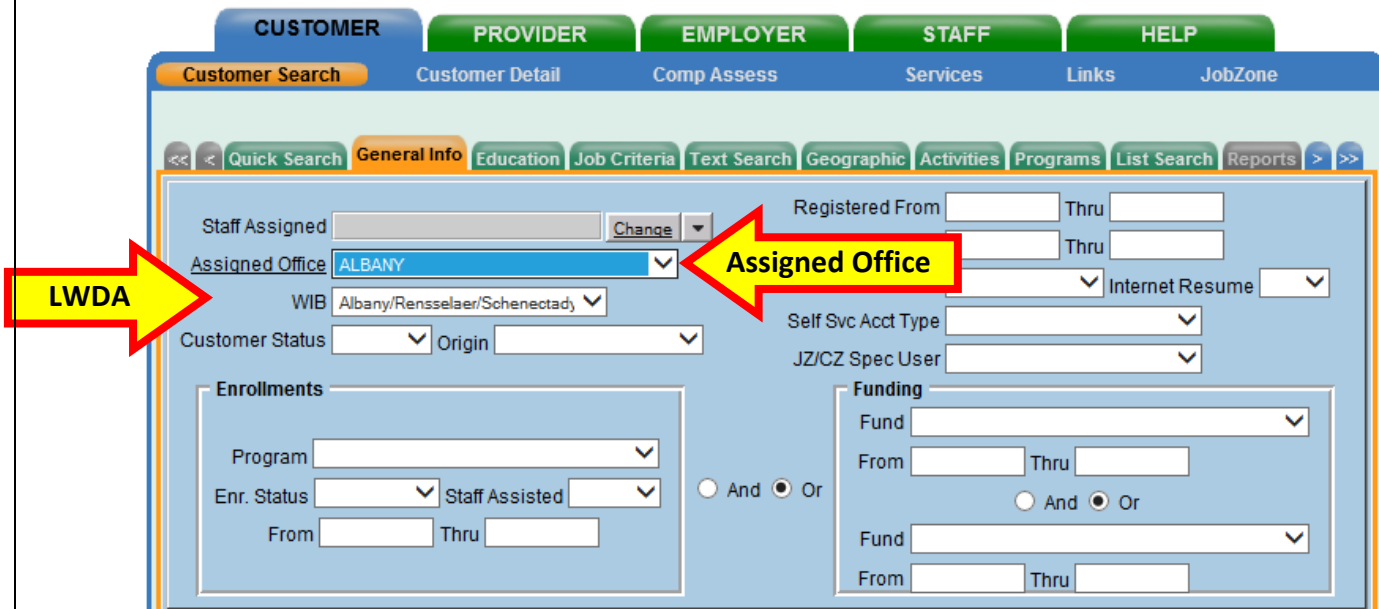
To identify customers by the staff member assigned to their record, click the Change button by the **Staff Assigned** data field and select the appropriate staff member from the pop-up.

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."



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 has a 'Quick Search' tab selected, with 'General Info' highlighted. A red arrow points to the 'General Info' tab. Below the tabs, there are several data fields: Staff Assigned (with a 'Change' button), Assigned Office (ALBANY), WIB (Albany/Rensselaer/Schenectady), Customer Status, Origin, Portfolio Level, Internet Resume, Self Svc Act Type, JZ/CZ Spec User, and two Funding sections. A yellow arrow points to the 'Staff Assigned' field.

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.

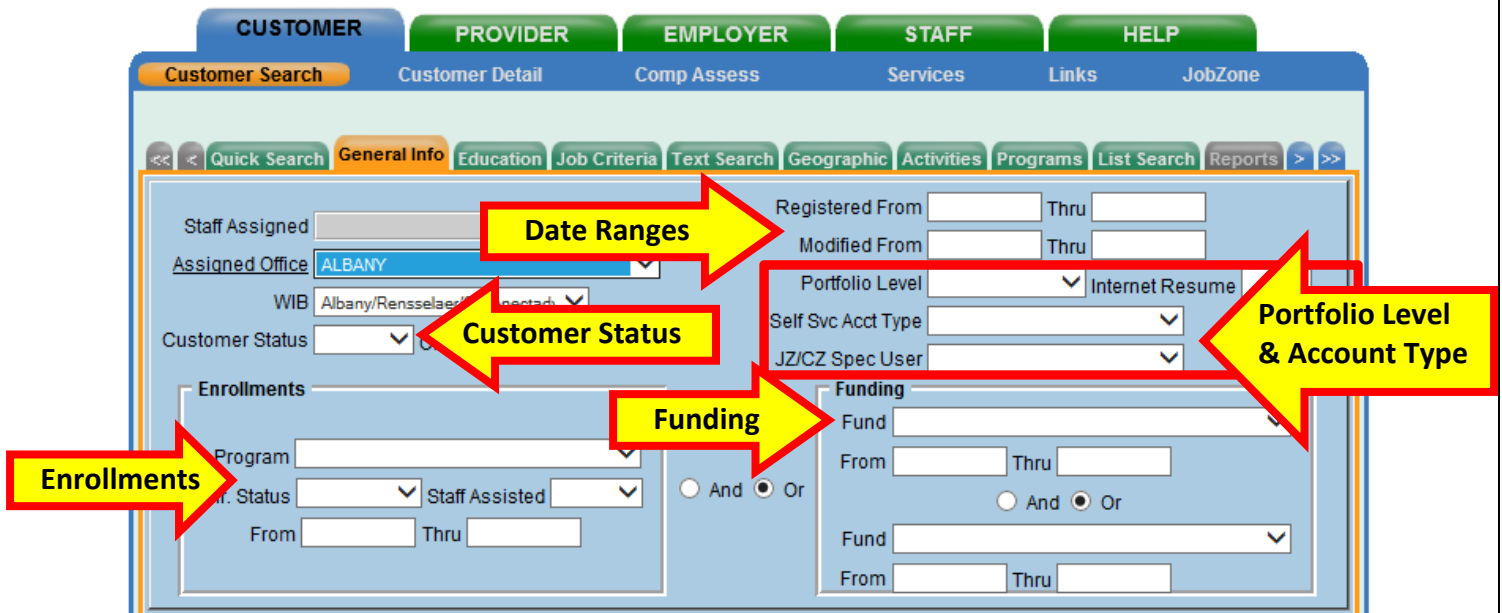


The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The main search area has a 'Quick Search' tab selected, with 'General Info' highlighted. A red arrow points to the 'Assigned Office' field. Below the tabs, there are several data fields: Staff Assigned (with a 'Change' button), Assigned Office (ALBANY), WIB (Albany/Rensselaer/Schenectady), Customer Status, Origin, Registered From, Internet Resume, Self Svc Act Type, JZ/CZ Spec User, and two Funding sections. A yellow arrow points to the 'LWDA' label.

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

These include:

- dates 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 shows the OSOS Customer Search interface. The top navigation bar includes 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 is divided into several sections:

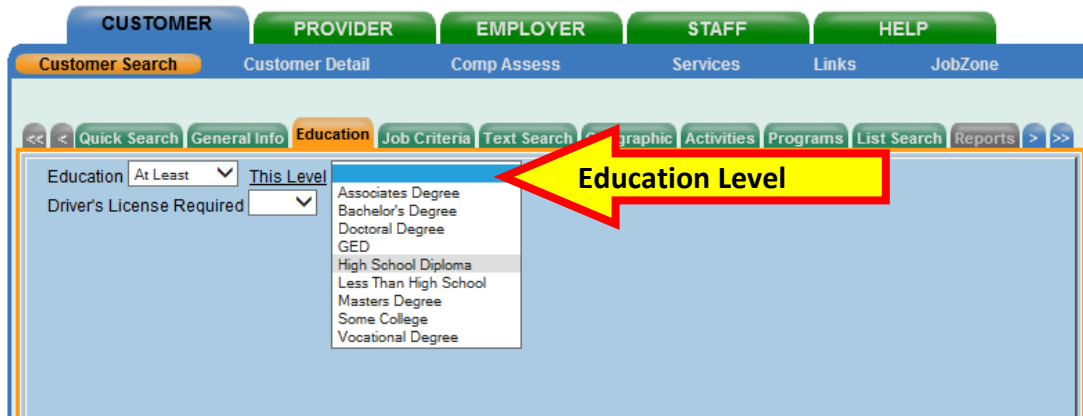
- General Info:** Contains fields for Staff Assigned, Assigned Office (ALBANY), WIB (Albany/Rensselaer), Customer Status, and Enrollment details (Program, Status, Staff Assisted, From/Thru dates).
- Date Ranges:** Fields for Registered From/Thru and Modified From/Thru.
- Portfolio Level & Account Type:** Fields for Portfolio Level (Internet Resume), Self Svc Acct Type, and JZ/CZ Spec User.
- Funding:** Fields for Fund, From/Thru dates, and And/Or options.

Yellow callout boxes with red arrows point to these specific sections: "Date Ranges", "Customer Status", "Enrollments", "Funding", and "Portfolio Level & Account Type".

SEARCHING IN THE EDUCATION TAB

This tab 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.

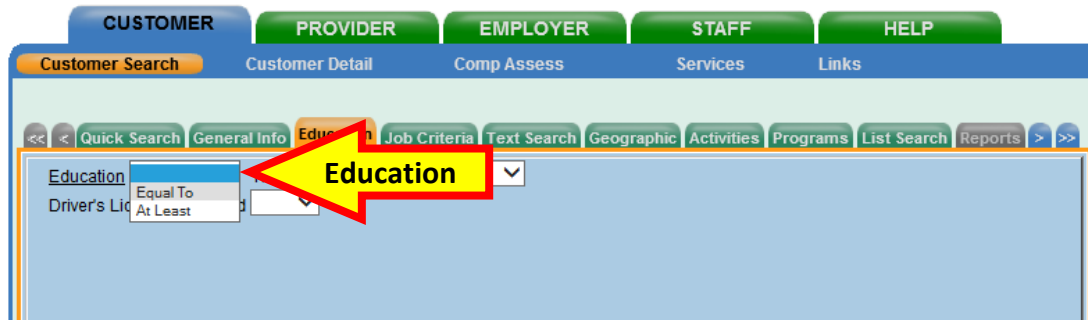
Click the down-drop arrow by the **This Level** data field and select the appropriate level of education.



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.

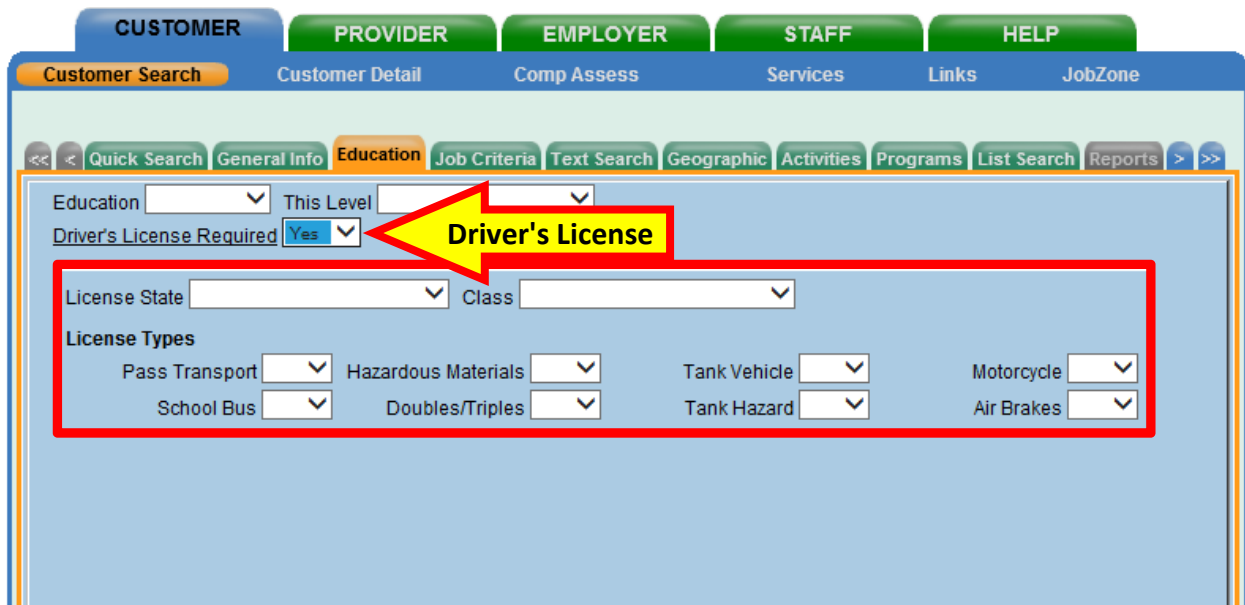
Selecting **At Least** will include all customers who have that level of education or higher. For example, a search for **At Least** an Associates Degree would also include customers with a Bachelor's Degree.



To limit the search to customers possessing a driver's license, select Yes in the drop-down menu by Driver's License Required.

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.

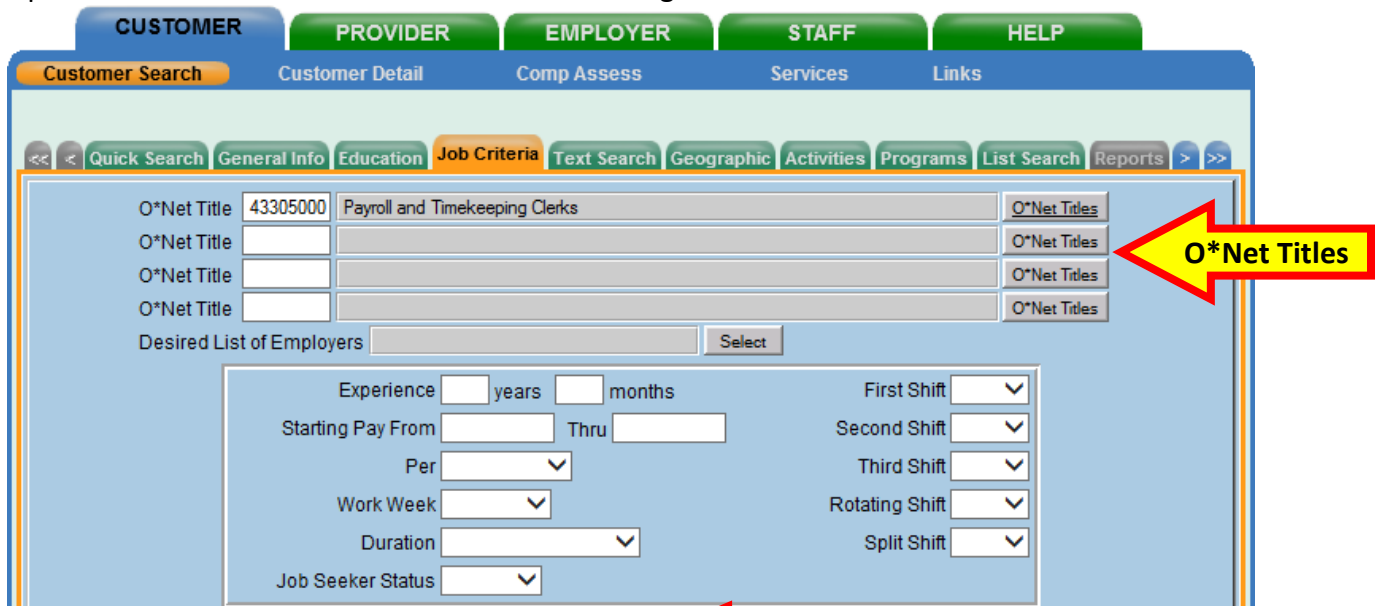
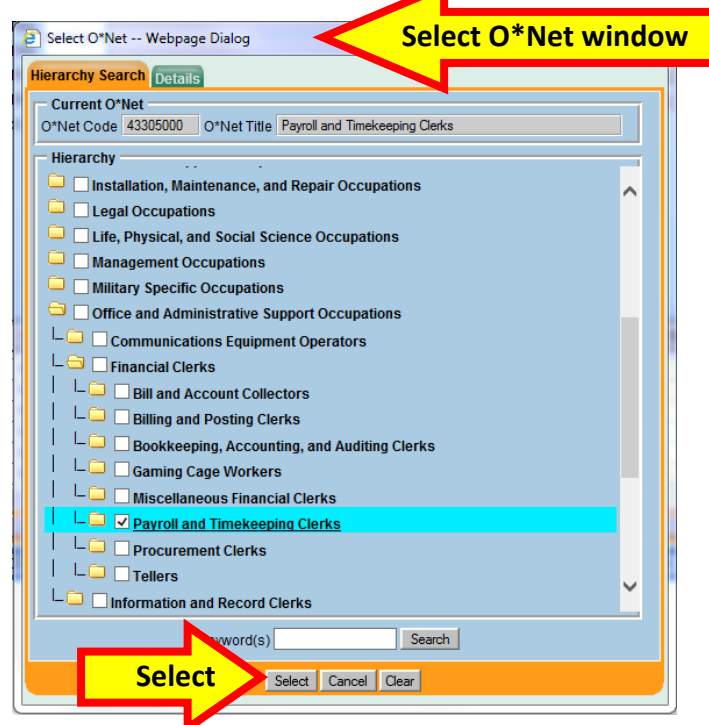


The screenshot shows the OSOS Customer Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The main search area has several filters: Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, Activities, Programs, List Search, and Reports. The Education filter is selected, and the Driver's License Required dropdown is set to Yes. A red arrow points to this dropdown with the text "Driver's License". Below this, a red-bordered box highlights the expanded license options, which include License State, Class, and License Types (Pass Transport, School Bus, Hazardous Materials, Doubles/Triples, Tank Vehicle, Tank Hazard, Motorcycle, and Air Brakes).

SEARCHING IN THE JOB CRITERIA TAB

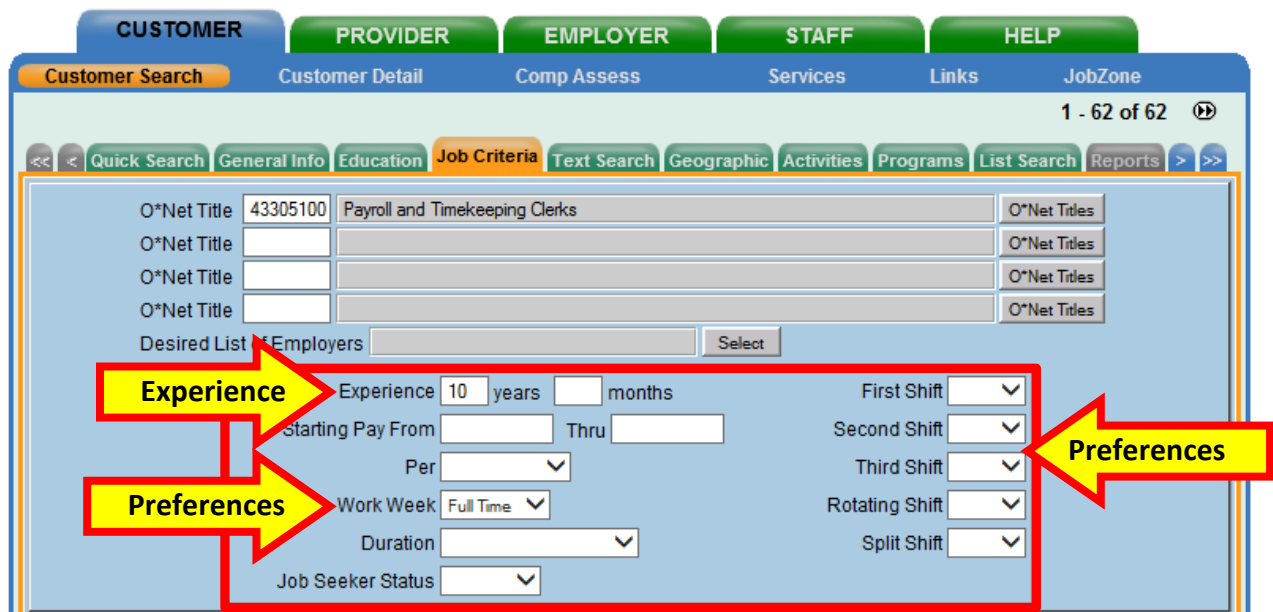
Adding O*Net titles into the upper portion of the **Job Criteria** tab will limit search results to customers with that job title(s) indicated in the **Objective** tab of their OSOS customer record. To add titles, click on the **O*Net Titles** button and select the desired title from the **Select O*Net** 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.

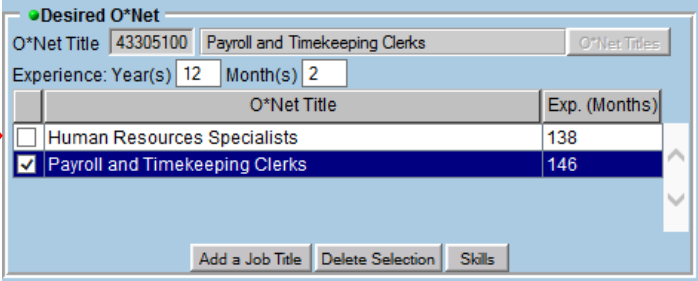
The lower portion of the **Job Criteria** tab displays a box where additional employment history information can be added to the search. Adding years or months into the **Experience** data field will limit the search to customers with at least that amount of employment experience indicated in the **Objective** 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.



The screenshot shows the OSOS interface with the **Job Criteria** tab selected. A red box highlights the search criteria fields. A yellow arrow labeled **Experience** points to the 'Experience' field (10 years, 0 months). Another yellow arrow labeled **Preferences** points to the 'First Shift' dropdown menu. Other fields include O*Net Title (43305100), Starting Pay From, Per, Work Week (Full Time), Duration, Job Seeker Status, and shift options (Second Shift, Third Shift, Rotating Shift, Split Shift).

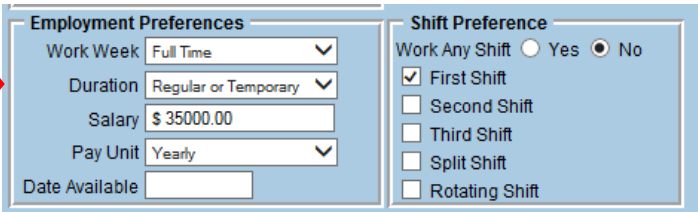
Employment Experience in the Objective tab



The 'Desired O*Net' dialog box shows the O*Net Title '43305100 Payroll and Timekeeping Clerks'. Experience is set to 12 Year(s) and 2 Month(s). A table lists selected O*Net titles:

O*Net Title	Exp. (Months)
<input type="checkbox"/> Human Resources Specialists	138
<input checked="" type="checkbox"/> Payroll and Timekeeping Clerks	146

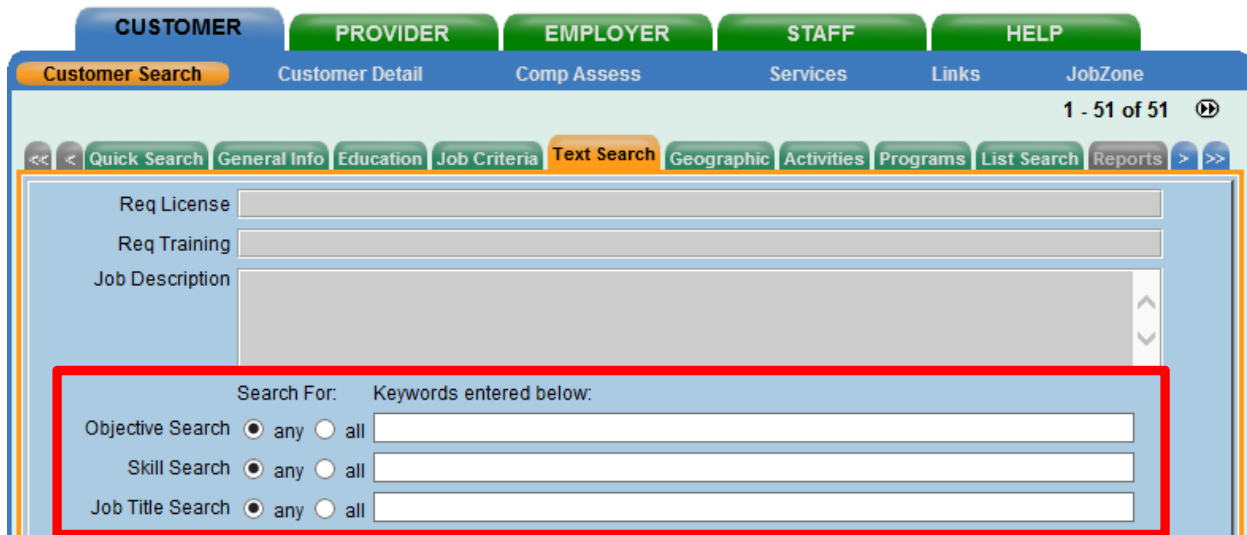
Preferences in the Add'l Info tab



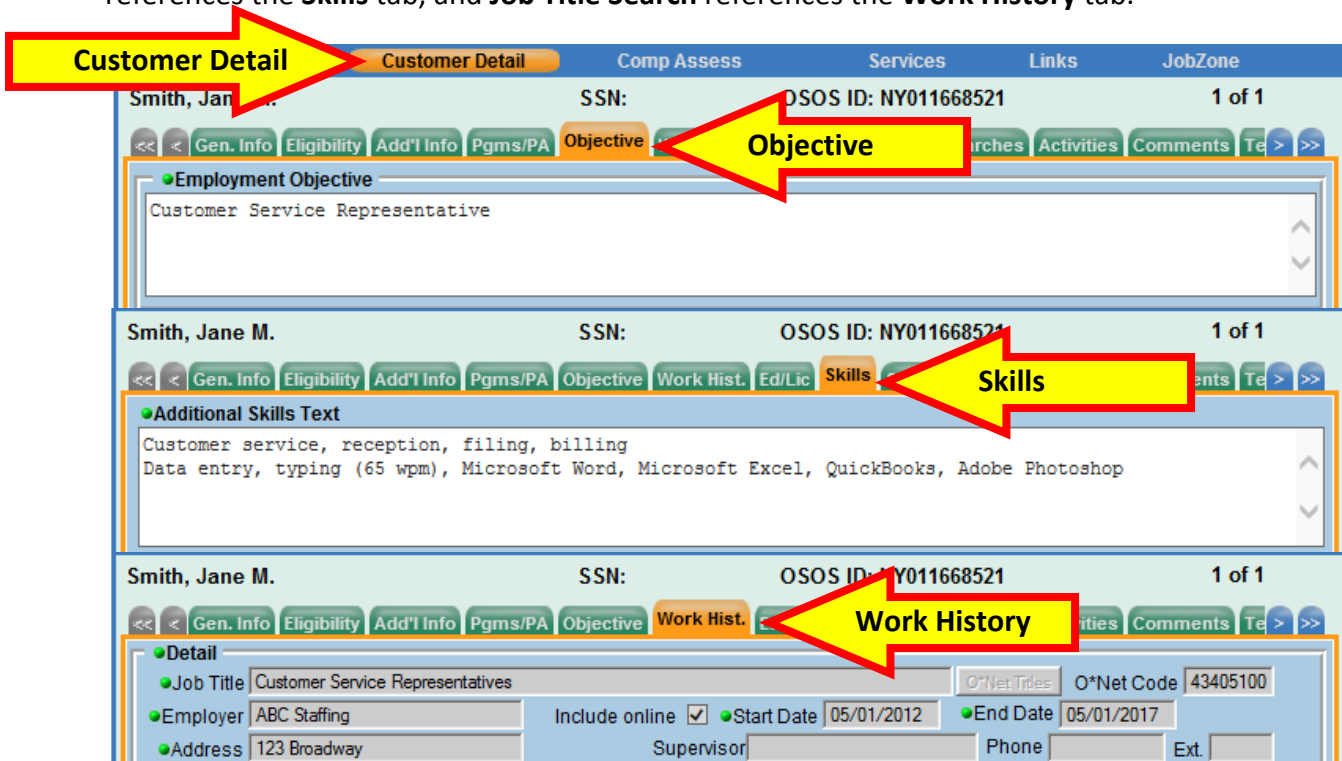
The 'Employment Preferences' dialog box shows: Work Week (Full Time), Duration (Regular or Temporary), Salary (\$ 35000.00), Pay Unit (Yearly), and Date Available. The 'Shift Preference' dialog box shows: Work Any Shift (Yes), and selected shifts (First Shift, Second Shift, Third Shift, Split Shift, Rotating Shift).

SEARCHING IN THE TEXT SEARCH TAB

Staff can type in keywords in the **Text Search** tab 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 **Objective** tab, **Skills Search** references the **Skills** tab, and **Job Title Search** references the **Work History** tab.



Customer Detail → Customer Detail | Comp Assess | Services | Links | JobZone

Smith, Jane M. | SSN: | OSOS ID: NY011668521 | 1 of 1

Gen. Info | Eligibility | Add'l Info | Pgms/PA | **Objective** | Searches | Activities | Comments | Te > >>

• Employment Objective

Customer Service Representative

Smith, Jane M. | SSN: | OSOS ID: NY011668521 | 1 of 1

Gen. Info | Eligibility | Add'l Info | Pgms/PA | Objective | Work Hist. | Ed/Lic | **Skills** | ents | Te > >>

• Additional Skills Text

Customer service, reception, filing, billing
Data entry, typing (65 wpm), Microsoft Word, Microsoft Excel, QuickBooks, Adobe Photoshop

Smith, Jane M. | SSN: | OSOS ID: NY011668521 | 1 of 1

Gen. Info | Eligibility | Add'l Info | Pgms/PA | Objective | **Work Hist.** | ities | Comments | Te > >>

• Detail

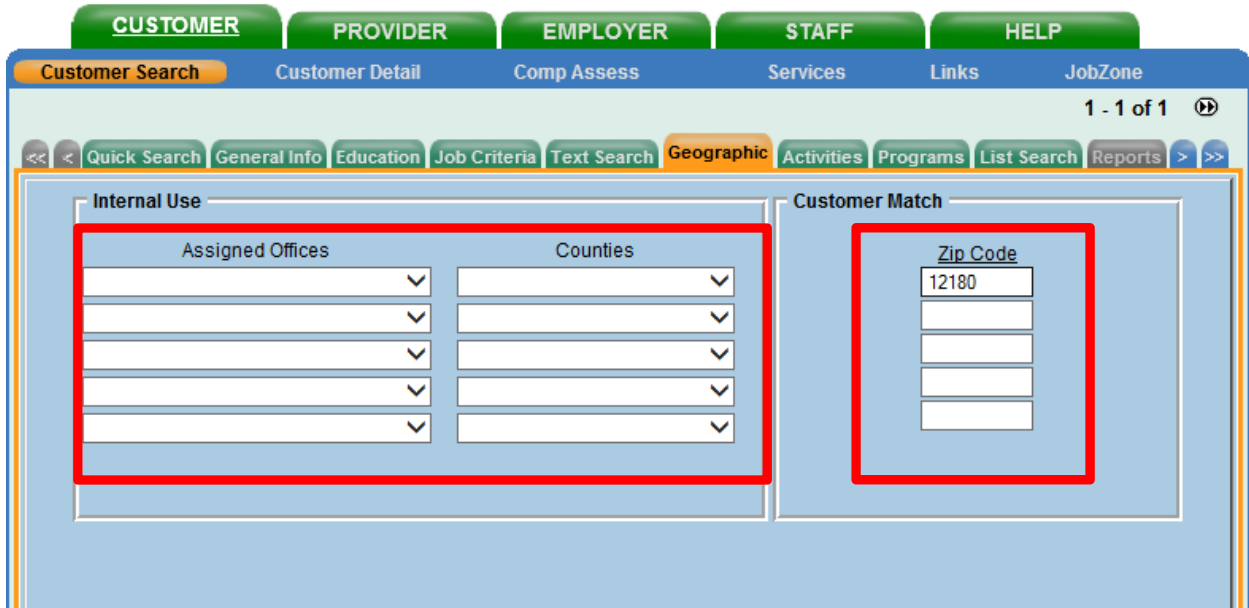
• Job Title Customer Service Representatives | O*Net Title | O*Net Code 43405100

• Employer ABC Staffing | Include online | • Start Date 05/01/2012 | • End Date 05/01/2017

• Address 123 Broadway | Supervisor | Phone | Ext.

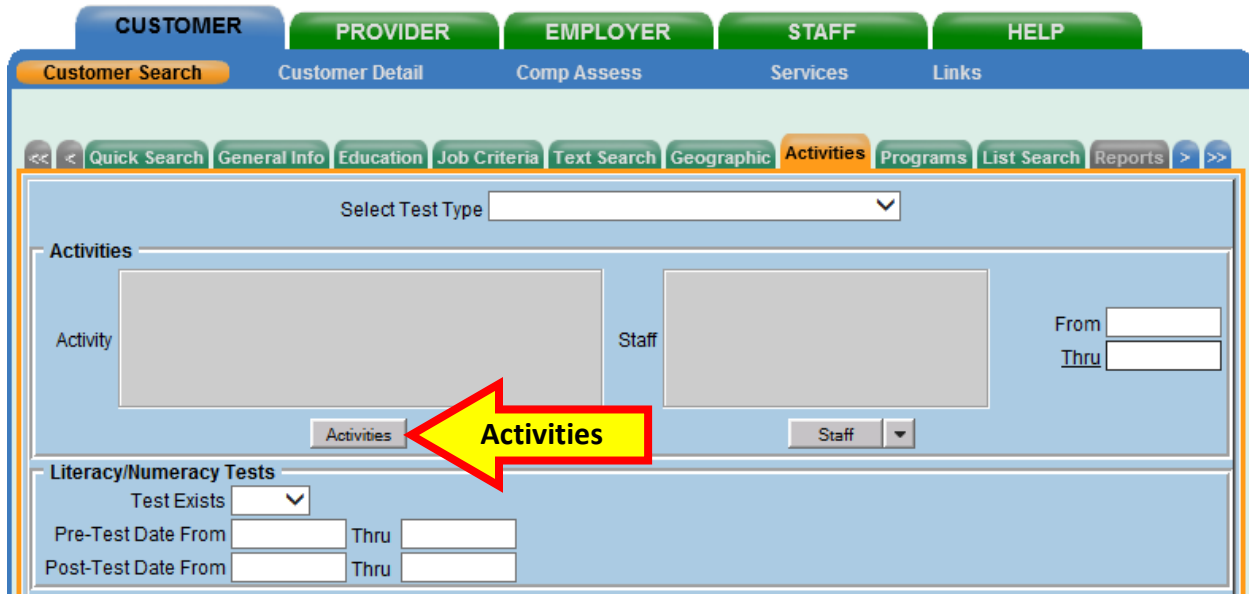
SEARCHING IN THE GEOGRAPHIC TAB

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.



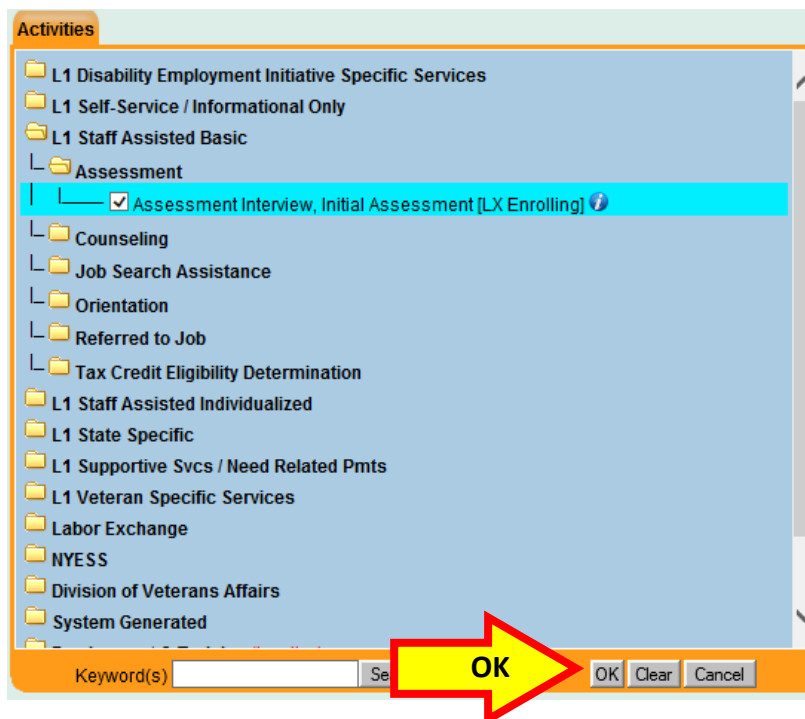
SEARCHING IN THE ACTIVITIES TAB

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



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, and Links. The main navigation bar includes Quick Search, General Info, Education, Job Criteria, Text Search, Geographic, **Activities**, Programs, List Search, and Reports. The Activities section is active, showing a 'Select Test Type' dropdown, an 'Activities' label, and two input fields for 'Activity' and 'Staff'. A yellow arrow points to the 'Activities' button. Below these fields are 'Literacy/Numeracy Tests' options, including 'Test Exists', 'Pre-Test Date From', 'Post-Test Date From', and 'Thru' fields.

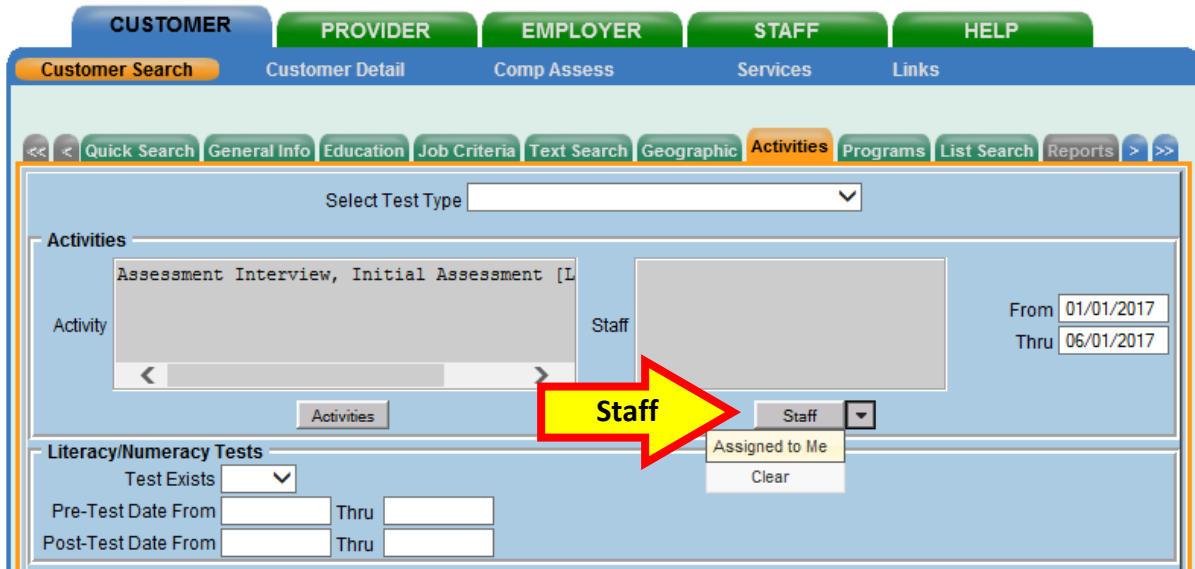
First, select the activity. Click on **Activities** and then select one or more activities from the **Activities** pop up. Then click **OK**.



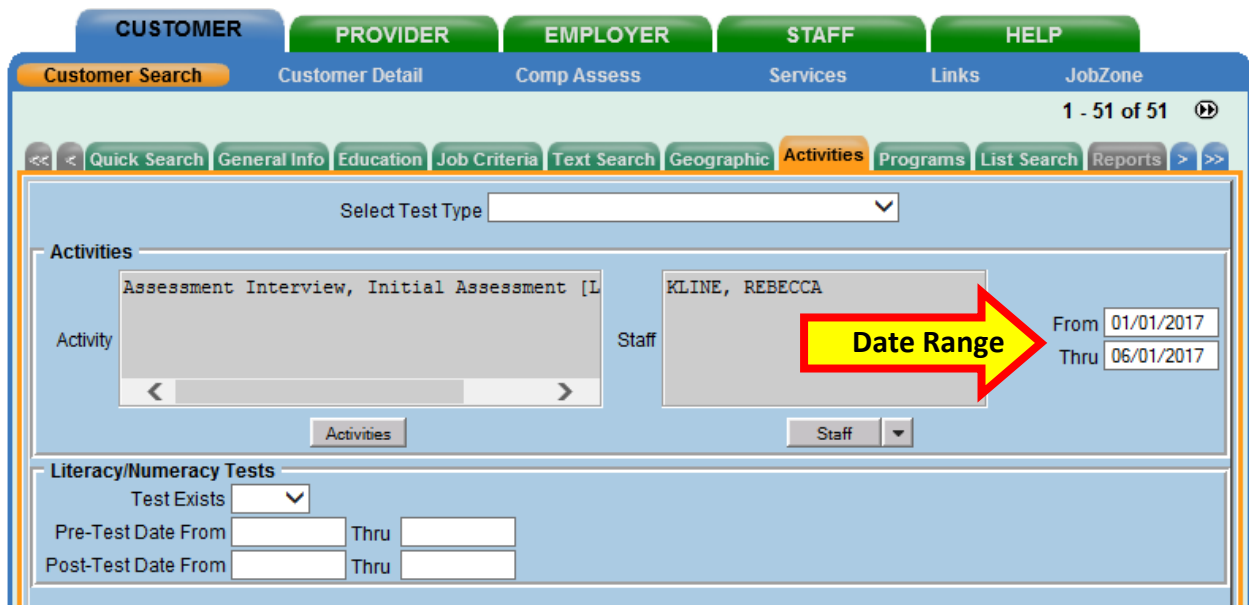
The screenshot shows the OSOS Activities pop-up window. It displays a list of activities under the 'Activities' tab. The list includes: L1 Disability Employment Initiative Specific Services, L1 Self-Service / Informational Only, L1 Staff Assisted Basic, Assessment (with a sub-item 'Assessment Interview, Initial Assessment [LX Enrolling]' selected), Counseling, Job Search Assistance, Orientation, Referred to Job, Tax Credit Eligibility Determination, L1 Staff Assisted Individualized, L1 State Specific, L1 Supportive Svcs / Need Related Pmts, L1 Veteran Specific Services, Labor Exchange, NYESS, Division of Veterans Affairs, and System Generated. A yellow arrow points to the 'OK' button at the bottom of the window.

Next, click the down-drop arrow by the **Staff** button. Then click **Assigned to Me** 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.





SEARCHING IN THE PROGRAMS TAB

The **Programs** tab 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.

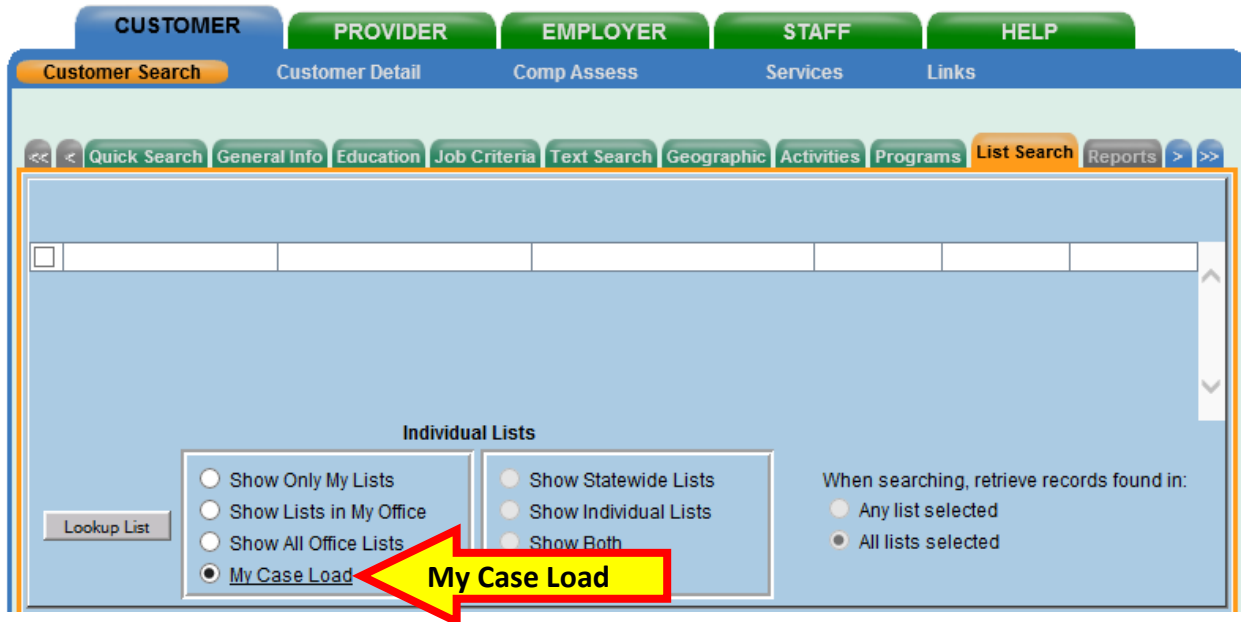
The data fields in the **Programs/Public Assistance** section can be used to search based on what programs the customer is enrolled in and/or which public assistance programs the customer is receiving.

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.

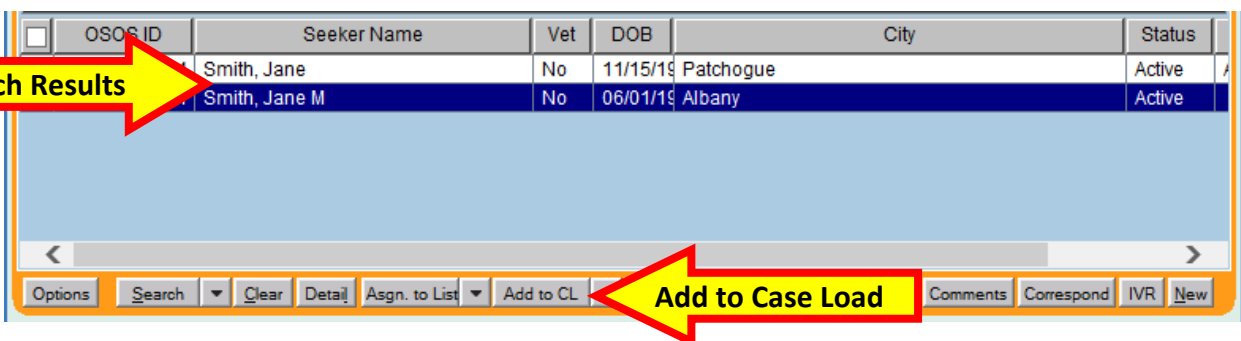
The screenshot shows the OSOS web interface with the 'Programs' tab selected. The interface includes a top navigation bar with 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP' buttons. Below this is a secondary navigation bar with 'Customer Search', 'Customer Detail', 'Comp Assess', 'Services', and 'Links'. The main content area features a search filter bar with options like 'Quick Search', 'General Info', 'Education', 'Job Criteria', 'Text Search', 'Geographic', 'Activities', 'Programs', 'List Search', and 'Reports'. The 'Programs' section is divided into four sub-sections: 'Military Service' (with fields for Veteran Status, Veteran Era, Recently Separated, and Service Disability), 'Program Qualification' (with fields for UI-Claimant Status, Lower Living Std, Migrant Status, and Profiled?), 'Programs/Public Assistance' (with a dropdown menu), and 'Work History' (with fields for Petition # and RR Event #). Red callout boxes with yellow text and arrows point to each of these four sub-sections.

SEARCHING IN THE LIST SEARCH TAB

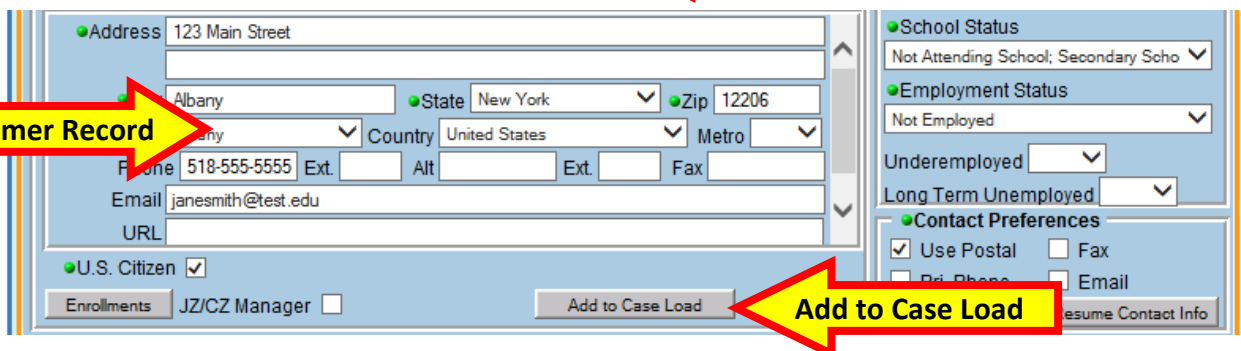
In the **List Search** tab, staff can choose to limit their search to customers who have already been added to an OSOS list. The most common use of this tab is the **My Case Load** button.



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.



OSOS ID	Seeker Name	Vet	DOB	City	Status
	Smith, Jane	No	11/15/19	Patchogue	Active
	Smith, Jane M	No	06/01/19	Albany	Active

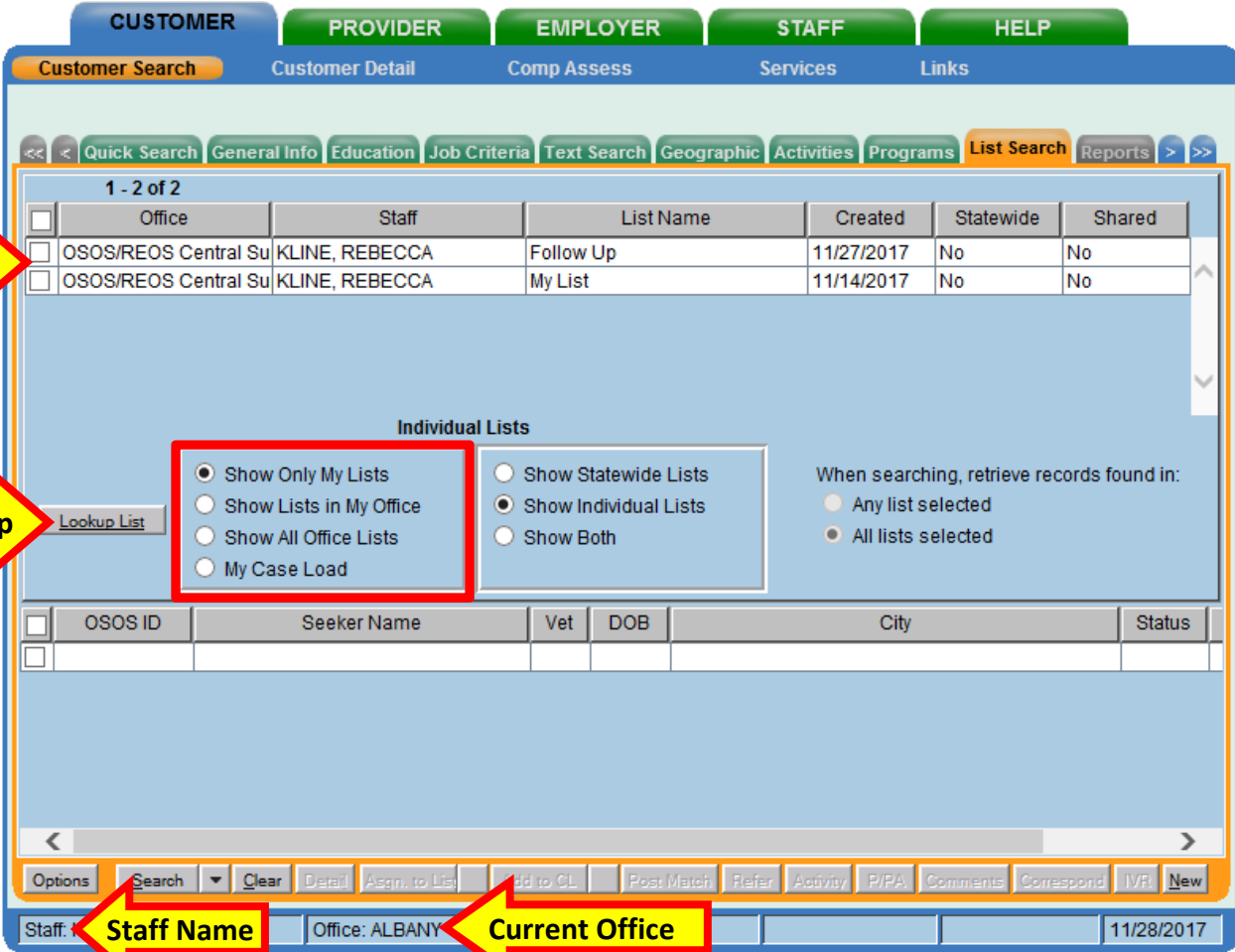


Staff can also view and select other lists to be utilized in their search.

Select **Show Only My Lists** and click on **Lookup List**. 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 and click on **Lookup List**. 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 checkboxes 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.



Lists →

<input type="checkbox"/>	Office	Staff	List Name	Created	Statewide	Shared
<input type="checkbox"/>	OSOS/REOS Central Su	KLINE, REBECCA	Follow Up	11/27/2017	No	No
<input type="checkbox"/>	OSOS/REOS Central Su	KLINE, REBECCA	My List	11/14/2017	No	No

Lookup →

Individual Lists

- Show Only My Lists
- Show Lists in My Office
- Show All Office Lists
- My Case Load
- Show Statewide Lists
- Show Individual Lists
- Show Both

When searching, retrieve records found in:

- Any list selected
- All lists selected

Staff Name →

Current Office →

11/28/2017



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