

# **QUEST NDWG Employer Search and New Business Jacket OSOS Guide**



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PURPOSE

In May 2023, the United States Department of Labor announced the availability of funding for the 2023 Quality Jobs, Equity, Strategy, and Training (QUEST) Disaster Recovery National Dislocated Worker Grant (DWG) to increase employer and workforce system customer access to good jobs in the industry sectors most impacted by the COVID-19 pandemic. The New York State Department of Labor (NYSDOL) was awarded \$5 million under the QUEST NDWG and has partnered with CNY Works, Inc to continue the Workforce Forward: Syracuse project, which expands upon existing I-81 initiatives and includes new infrastructure and care economy projects in the Onondaga County Local Workforce Development Area (LWDA). This project aims to achieve QUEST’s goals, including access to good jobs in the infrastructure and care economy sectors, by utilizing pre-employment work readiness programs and expanding career exploration assessments, comprehensive supportive services, business engagement via quality jobs development, community outreach initiatives, and advancing workforce training partnerships.



The project targets local job seekers, including long-term unemployed, underemployed, low-skilled, additional populations with barriers to employment (e.g., veterans, formerly justice-involved, people with disabilities, women, minorities, etc.), and individuals who previously would have been eligible for the Trade Adjustment Assistance (TAA) program.

Currently NYSDOL is partnering with New York State Department of Transportation (NYSDOT) in developing its I-81 project talent pipeline to identify and include more priority “hire ready” job seekers for its Local Hire Incentive referral program. The project will expand existing work readiness programs and job networks to create a greater “hire ready” applicant pool for approved I-81 contractors, subcontractors, and other employers.

This guide provides instructions on how to conduct the OSOS data entry for the QUEST NDWG project and provides staff with the basics of how to perform an Employer Search and create a New Business Jacket for businesses associated with the QUEST NDWG project.

It’s important to do a thorough search so duplicate records are not created.

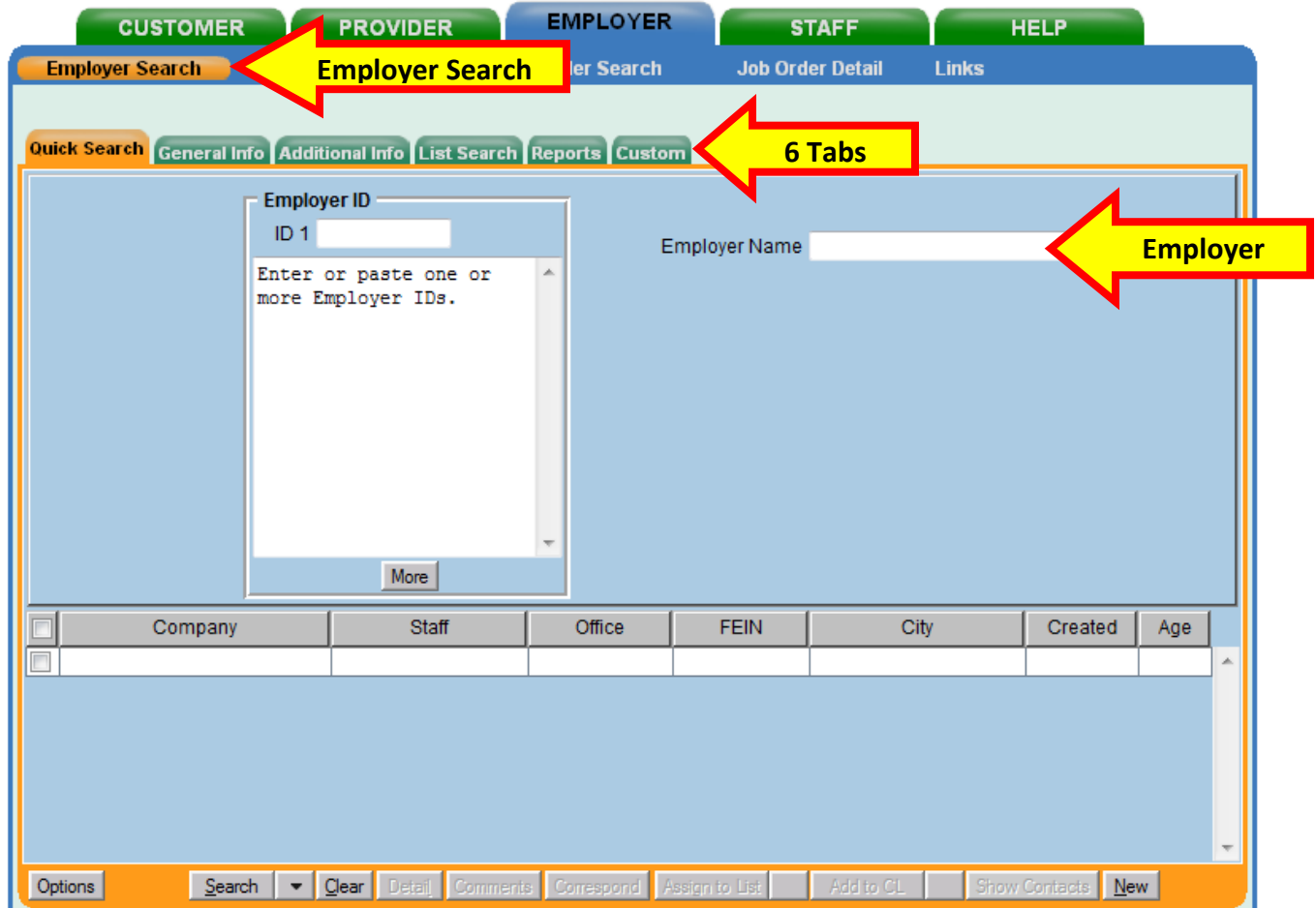
An Employer Search allows you to search for a single employer record or multiple employer records by filling in one or a combination of fields on the Employer Search Screens.

The main reasons to conduct an employer search include:

- Verifying if a particular employer has already been entered into OSOS prior to entering a job order; thus avoiding a duplicate entry
- Search for jobs associated with a particular employer
- Create a business jacket for a job central order to post a match activity

## OSOS DATA ENTRY

To conduct a search, from the OSOS Menu Bar, click Employer, then Employer Search. The Employer Search Window contains six tabs: **Quick Search, General Info, Additional Info, List Search, Reports and Custom**. Quick Search and General Info are the most frequently used.



### EMPLOYER SEARCH-QUICK SEARCH

Using the employer’s NYID number is the most accurate way to search.



*Use the % sign in front of some or the entire Employer/Business name to see all iterations of the Employer Name. Employers may be saved under multiple “versions” of the name. For example, Walmart, Wal Mart or Wal-Mart.*

If a Company has multiple locations there should be ONE Business name for each location.

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

Employer Search    Employer Detail    Job Order Search    Job Order Detail    Links

Quick Search    **Quick Search**    Search    Reports    Custom

Employer ID ID 1    Employer Name %abc

Enter or paste one or more Employer IDs.

More

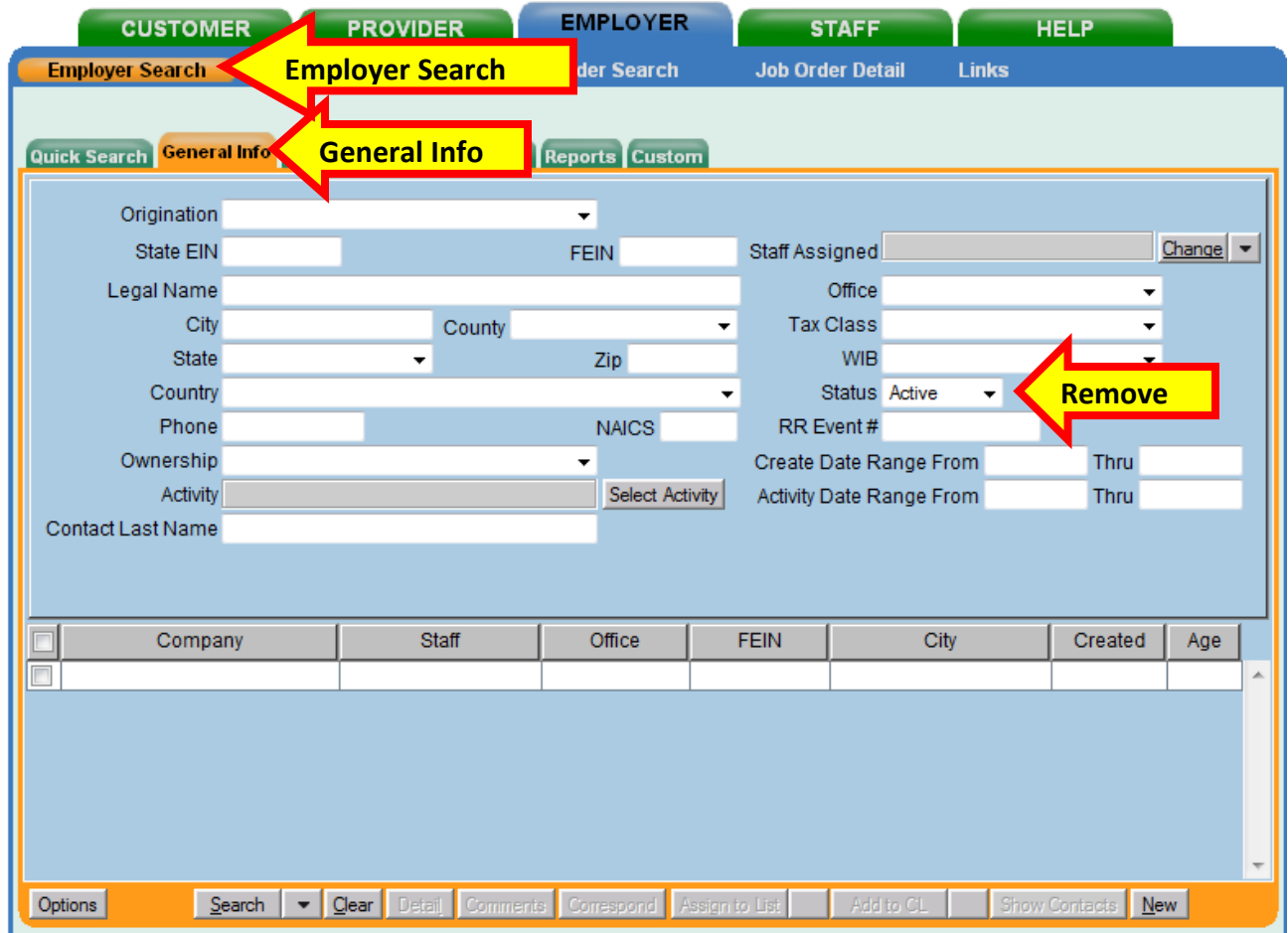
<input type="checkbox"/>	Company	Staff	Office	FEIN	City	Created	Age
<input type="checkbox"/>							

Options    Search    Clear    Detail    Comments    Correspond    Assign to List    Add to CL    Show Contacts    New



*Tip: Try searching for the Employer/Business by using the word "The" as it appears as the first word in many Employer Names.*

## EMPLOYER SEARCH- GENERAL INFO TAB



On the General Information Tab remove the “Active” in the Status field - “Less is better.”

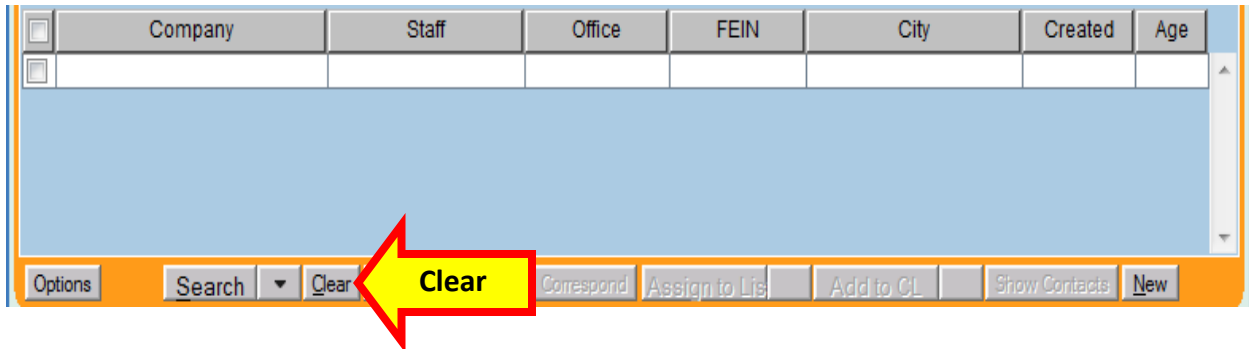
If the desired business is labeled “inactive” change the status to active instead of adding a new Business Jacket. Verify that the Employer's contact information is accurate and update it if necessary.

If search results need to be narrowed search by WIB or City.

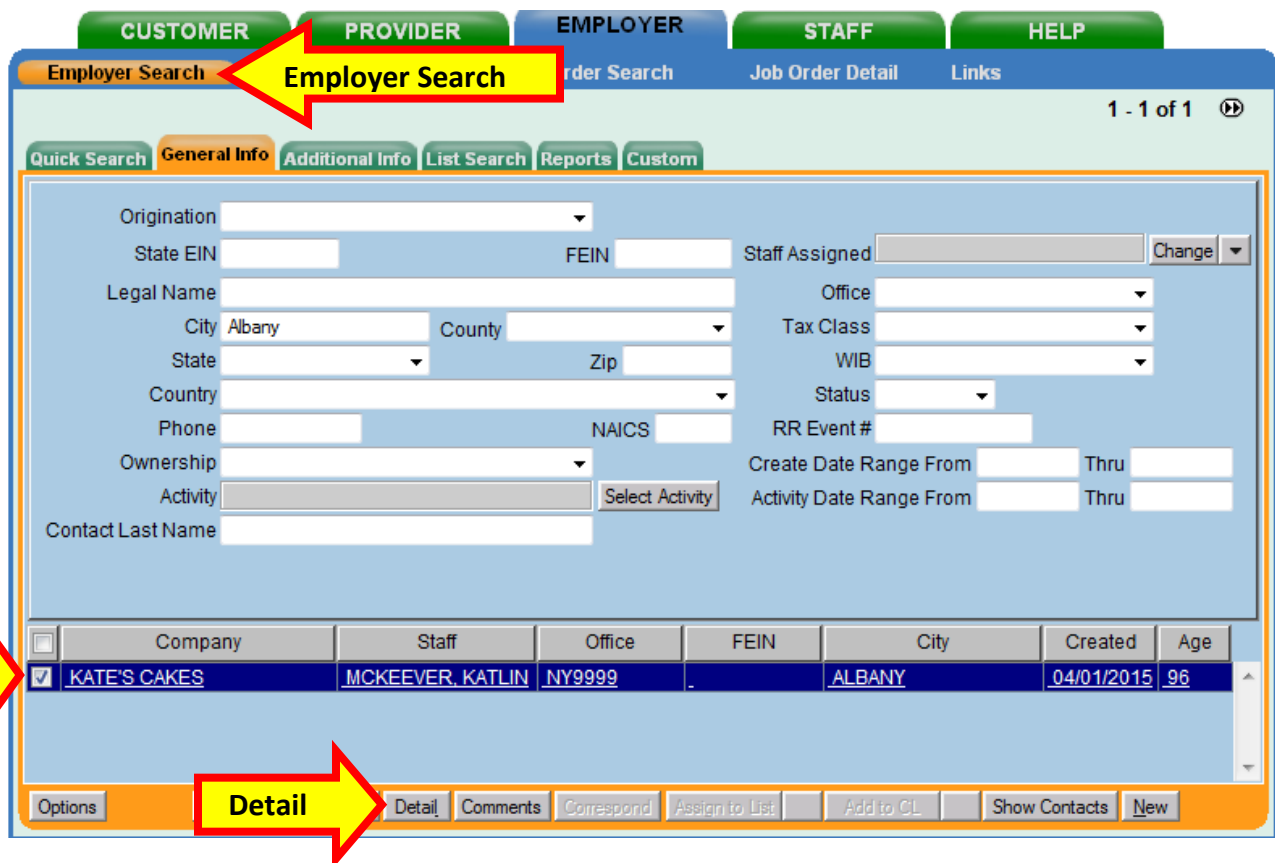


*If a business does not receive a service within 180 days the business will automatically become “inactive.”*

To clear a search and start a new one, click the Clear button located on the bottom of the screen. This clears out ALL information entered and allows for a new search.



*It is not recommended to type over the old information when starting a new search.*



The results of the search will appear in the Search Results pane on the **Employer Search** screen. If the business appears in the search results field, click in the box to the left of the employer name and click the grey **Detail** button on the bottom of the screen to view the record. The Detail button will activate once one or more employers from the search results field are selected.



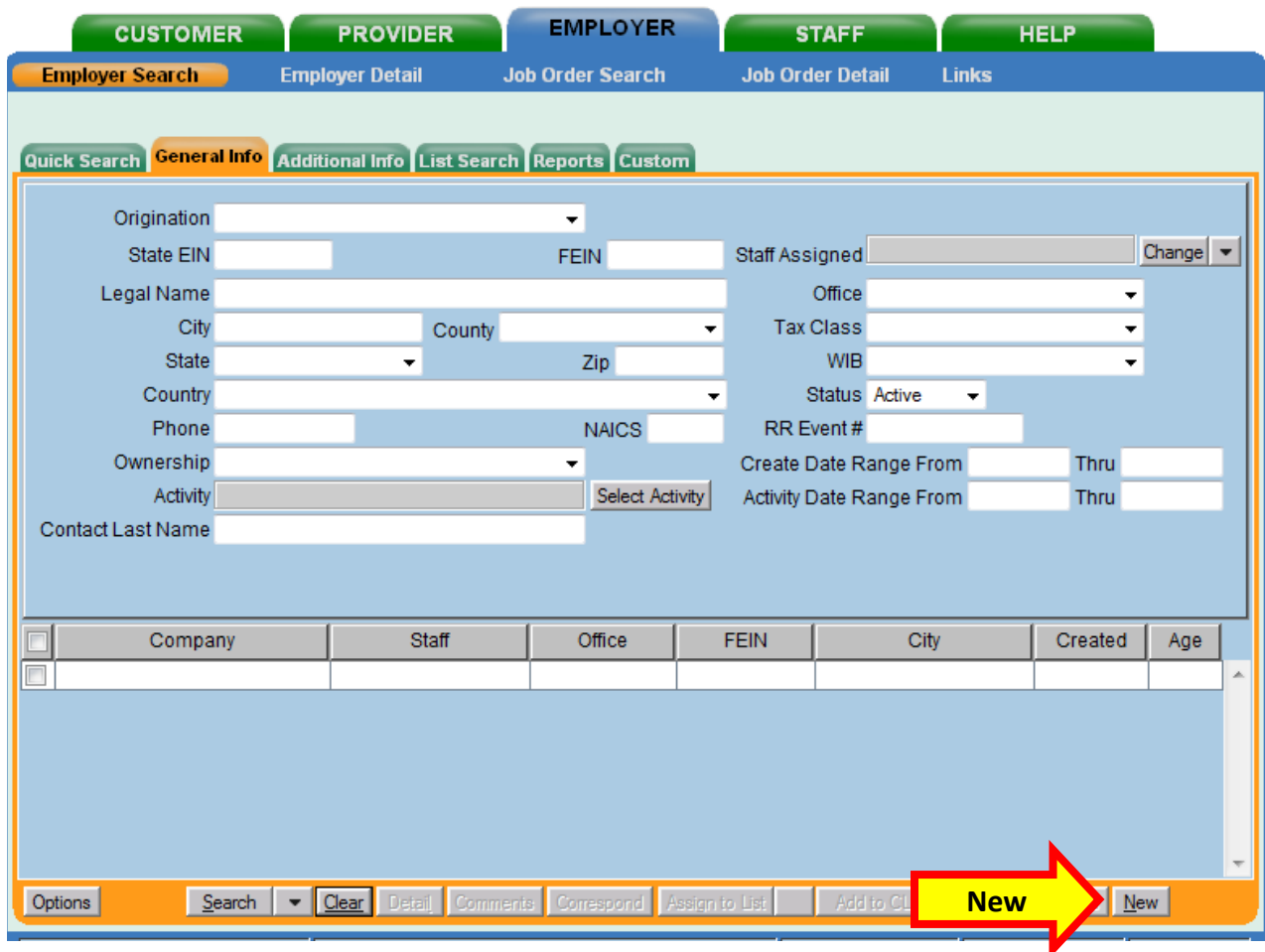
*It is best for customer service reasons not to duplicate a business jacket if the business jacket lists a corporate address. If you have a different contact, you can add the contact person to an existing business jacket. If there is more than one business jacket for a corporate record it will be hard to determine if there has been contact by other staff and customer service can be undermined.*

If no results are found, click the **New** button to create a new employer record.

## CREATING A NEW EMPLOYER RECORD (BUSINESS JACKET)

If an employer does not have a record in OSOS create a new employer record.

A NEW employer record can be created from any Search Window tab by clicking the **New** button at the bottom of the screen.




The screenshot shows the OSOS Employer Search interface. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below this, there are sub-tabs for Employer Search, Employer Detail, Job Order Search, Job Order Detail, and Links. The main content area has sub-tabs for Quick Search, General Info (selected), Additional Info, List Search, Reports, and Custom. The General Info section contains various search criteria fields: Origination (dropdown), State EIN, FEIN, Staff Assigned (dropdown with Change button), Legal Name, City, County (dropdown), Office (dropdown), State (dropdown), Zip, Tax Class (dropdown), Country (dropdown), Zip, WIB (dropdown), Phone, NAICS, Status (dropdown, set to Active), RR Event #, Ownership (dropdown), Create Date Range From/Thru, Activity (dropdown with Select Activity button), Activity Date Range From/Thru, and Contact Last Name. At the bottom, there is a toolbar with buttons for Options, Search, Clear, Detail, Comments, Correspond, Assign to List, Add to CL, and a prominent yellow arrow pointing to a New button.

Clicking the **New** button will bring up the Employer Detail tabs of the Employer Detail Module.



## NEW BUSINESS JACKET- GENERAL INFO

The employers' status must be **Active** to add a new employer. The **Status** data field on the **General Info** screen will be automatically set to **Active** by OSOS for new records.

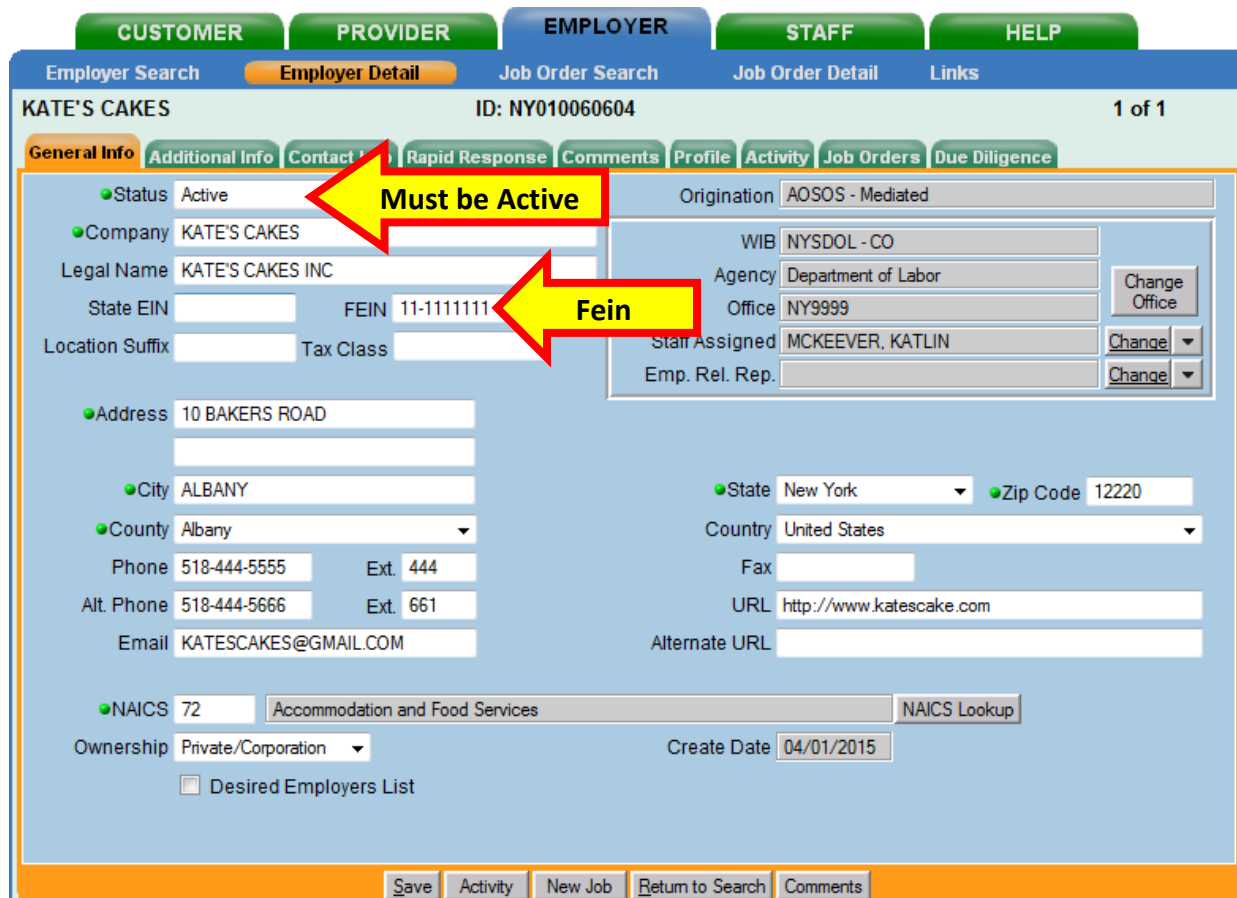
Required information fields are highlighted by a green circle  and must be completed.

The "green circle" required information on the **General Info** and **Contact Info** tabs must be completed in order to save the Business Jacket.

All **FEIN** numbers are mandatory. This is a performance indicator. It is used to track placements for the business and track hires.



*If a business does not disclose the FEIN contact Business Services. The FEIN can be acquired through other resources.*



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

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

KATE'S CAKES ID: NY010060604 1 of 1

**General Info** Additional Info Contact Info Rapid Response Comments Profile Activity Job Orders Due Diligence

Status Active **Must be Active** Origination AOSOS - Mediated  
 Company KATE'S CAKES  
 Legal Name KATE'S CAKES INC  
 State EIN FEIN 11-1111111 **Fein**  
 Location Suffix Tax Class  
 WIB NYSODL - CO  
 Agency Department of Labor Change Office  
 Office NY9999  
 Staff Assigned MCKEEVER, KATLIN Change  
 Emp. Rel. Rep. Change

Address 10 BAKERS ROAD  
 City ALBANY  
 County Albany  
 Phone 518-444-5555 Ext. 444  
 Alt. Phone 518-444-5666 Ext. 661  
 Email KATESCAKES@GMAIL.COM  
 State New York  
 Zip Code 12220  
 Country United States  
 Fax  
 URL http://www.katescake.com  
 Alternate URL

NAICS 72 Accommodation and Food Services NAICS Lookup  
 Ownership Private/Corporation  
 Create Date 04/01/2015  
 Desired Employers List

Save Activity New Job Return to Search Comments



*Fill in the Phone, Email and URL fields in the General Info tabs. This information can be helpful when researching the business. It will help determine what kind of positions the business is looking to fill, their mission, and their product.*

*Understanding the customer prior to outreach is important!*

## NEW BUSINESS JACKET - ADDITIONAL INFO

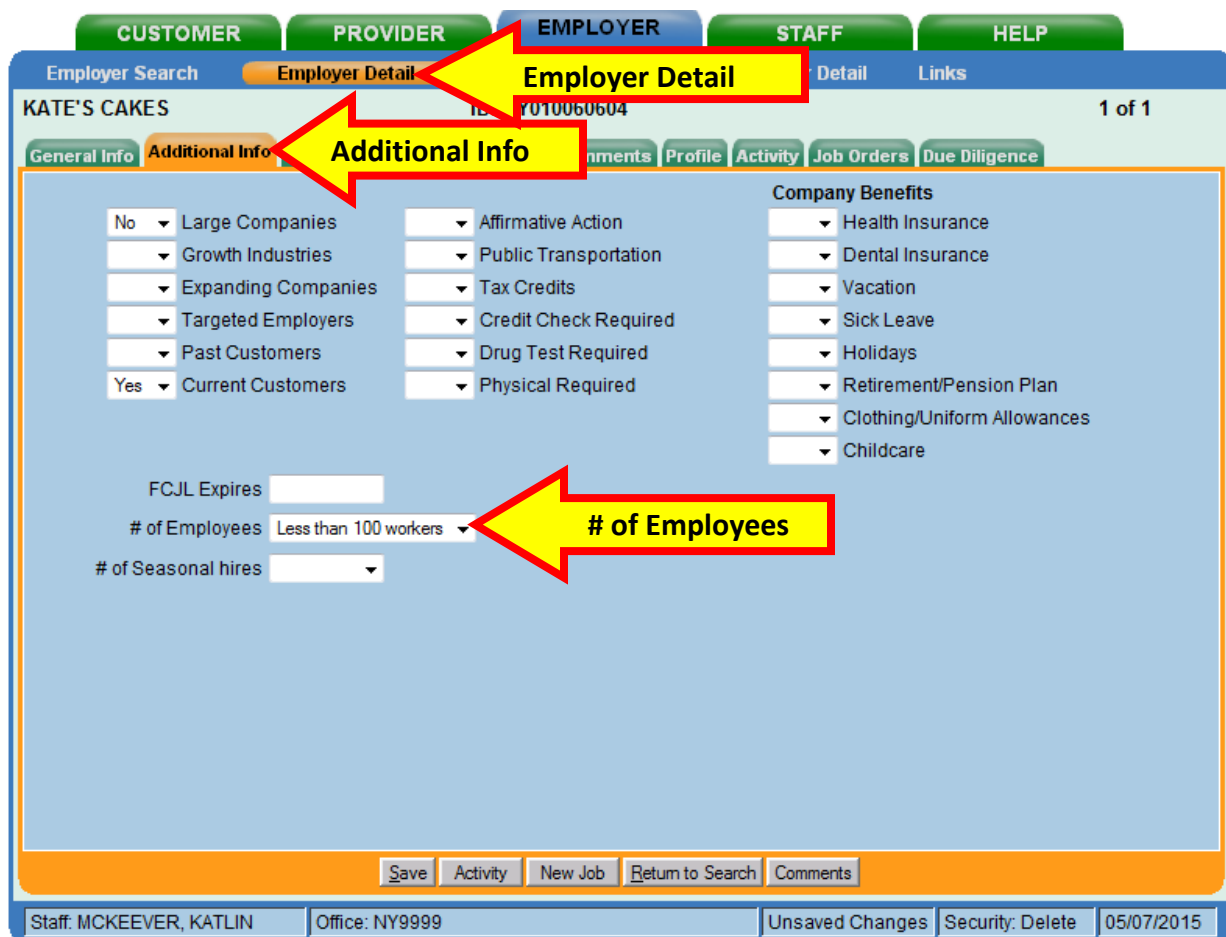
The Additional Info tab has several fields that aren't required to create an employer record but should be marked "Yes" if the information is available.

Click the dropdown arrow next to each field to update & select "Yes."

When the fields are selected "Yes" on the business profile, the benefits will show on all future job orders. Confirm that the benefits are offered for the job order that is being inputted. Be aware that Businesses don't always offer the same benefits for every position.



*Enter the Number of Employees and Seasonal Employees (if applicable). It is important to know the number of employees for grant reimbursement rates.*



The screenshot shows the 'EMPLOYER' tab selected in the top navigation bar. The main content area is titled 'Employer Detail' and shows the profile for 'KATE'S CAKES' with ID 'NY010060604'. The 'Additional Info' tab is highlighted, and a red arrow points to it. Below this, there are several dropdown menus for company characteristics, including 'Large Companies', 'Growth Industries', 'Expanding Companies', 'Targeted Employers', 'Past Customers', 'Current Customers', 'Affirmative Action', 'Public Transportation', 'Tax Credits', 'Credit Check Required', 'Drug Test Required', and 'Physical Required'. A 'Company Benefits' section lists options like 'Health Insurance', 'Dental Insurance', 'Vacation', 'Sick Leave', 'Holidays', 'Retirement/Pension Plan', 'Clothing/Uniform Allowances', and 'Childcare'. At the bottom, there are input fields for 'FCJL Expires', '# of Employees' (set to 'Less than 100 workers'), and '# of Seasonal hires'. A red arrow points to the '# of Employees' dropdown. At the bottom of the page, there are buttons for 'Save', 'Activity', 'New Job', 'Return to Search', and 'Comments', and a status bar showing 'Staff: MCKEEVER, KATLIN', 'Office: NY9999', 'Unsaved Changes', 'Security: Delete', and '05/07/2015'.

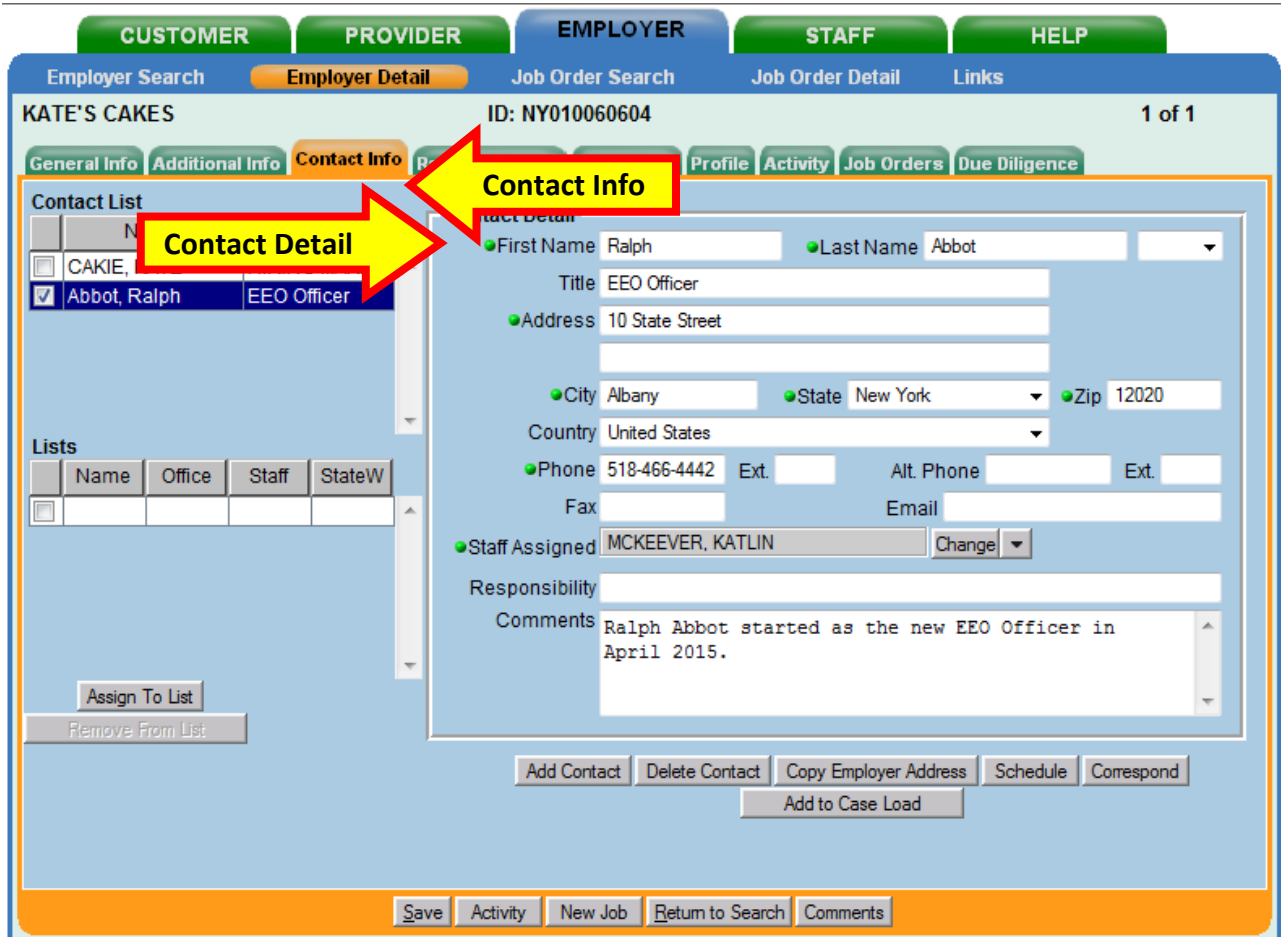
## NEW BUSINESS JACKET - CONTACT INFO

At least one employer contact person is required. If multiple contacts are created, the first contact will be the default contact. The contact information is carried over into job orders' associated with the employer.

Enter all required fields in the contact detail section. The **Title** field is not required but recommended for future reference. (i.e. hiring manager, HR manager etc)



*For LVER staff an EEO Officer is a valuable contact*



**CONTACT INFO**

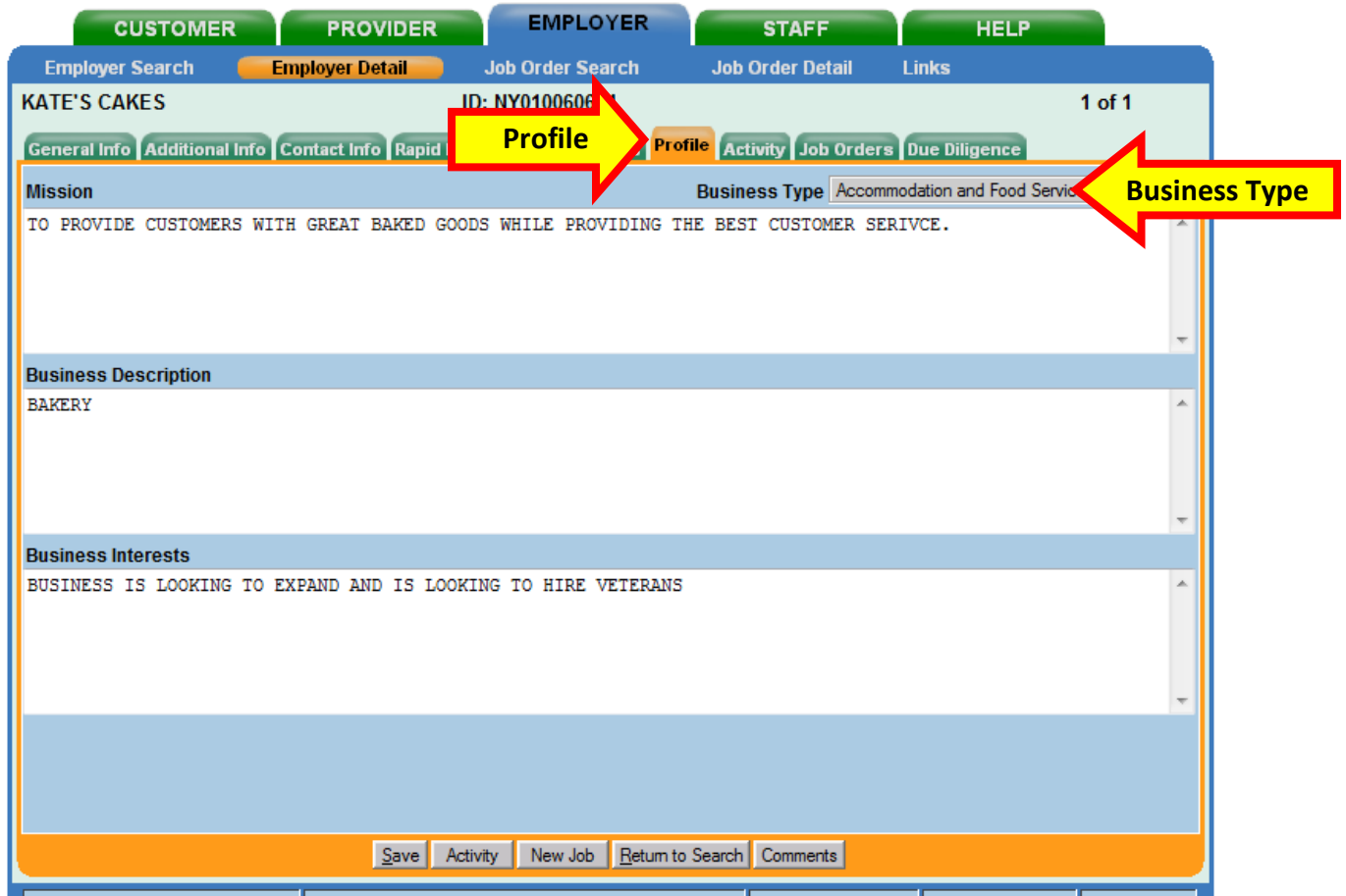
**Contact Detail**

First Name: Ralph  
 Last Name: Abbot  
 Title: EEO Officer  
 Address: 10 State Street  
 City: Albany  
 State: New York  
 Zip: 12020  
 Country: United States  
 Phone: 518-466-4442  
 Fax:   
 Email:   
 Staff Assigned: MCKEEVER, KATLIN  
 Responsibility:   
 Comments: Ralph Abbot started as the new EEO Officer in April 2015.

Name	Office	Staff	StateW
Abbot, Ralph	EEO Officer		

## NEW BUSINESS JACKET - PROFILE

Enter the Business Type, Mission, Business Description and Business interests on the Profile tab.



The screenshot shows the OSOS interface for an employer profile. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail (selected), Job Order Search, Job Order Detail, and Links. The main content area is for 'KATE'S CAKES' with ID: NY0100606. A 'Profile' tab is highlighted with a red arrow. Other tabs include General Info, Additional Info, Contact Info, Rapid, Profile (selected), Activity, Job Orders, and Due Diligence. The 'Business Type' field is set to 'Accommodation and Food Service' and is also highlighted with a red arrow. The 'Mission' field contains the text: 'TO PROVIDE CUSTOMERS WITH GREAT BAKED GOODS WHILE PROVIDING THE BEST CUSTOMER SERVICE.'. The 'Business Description' field contains 'BAKERY'. The 'Business Interests' field contains 'BUSINESS IS LOOKING TO EXPAND AND IS LOOKING TO HIRE VETERANS'. At the bottom, there are buttons for Save, Activity, New Job, Return to Search, and Comments.

Although this information is not required to save the new business jacket, information recorded here can be helpful for staff to identify businesses that have indicated a preference for hiring veterans; federal contractors etc.



*Refer to the business's website when filling out the Profile tab*

Listing past titles hired will be helpful for future Job Development leads.

## NEW BUSINESS JACKET - ACTIVITY & JOB ORDER

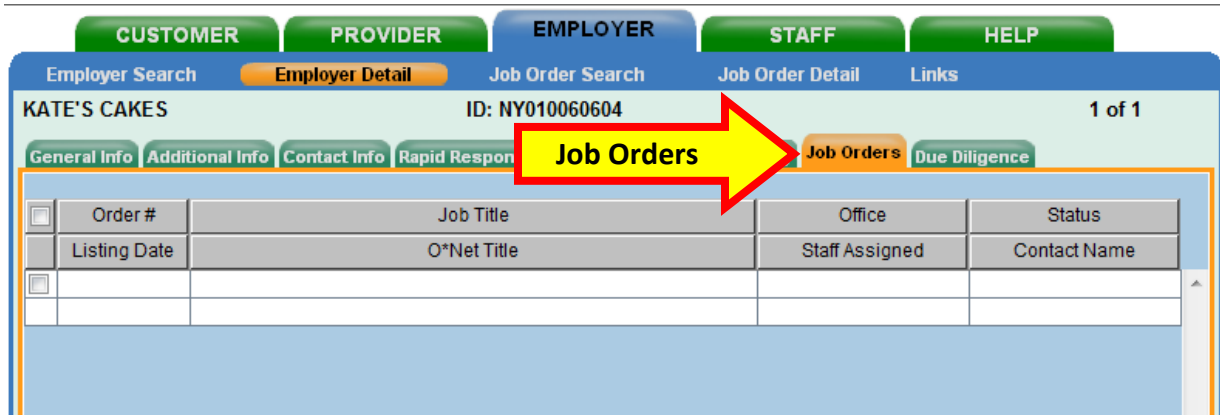
The Activity tab will record any OSOS activities provided to the employer by staff after the business jacket is created



The screenshot shows the OSOS interface with the 'EMPLOYER' tab selected. The employer name is 'KATE'S CAKES' and the ID is 'NY010060604'. The 'Activity' tab is highlighted with a yellow arrow. Below the tabs is a table with the following data:

Date	Activity	Employer Rep.	Emp. Cont.	Staff	VETS	Comments
04/01/2015	Employer Company Prof		CAKIE, KATE	MCKEEVER, KATI		

The Job Order tab will contain all the staff entered job orders which will be indicated by an **NY**.

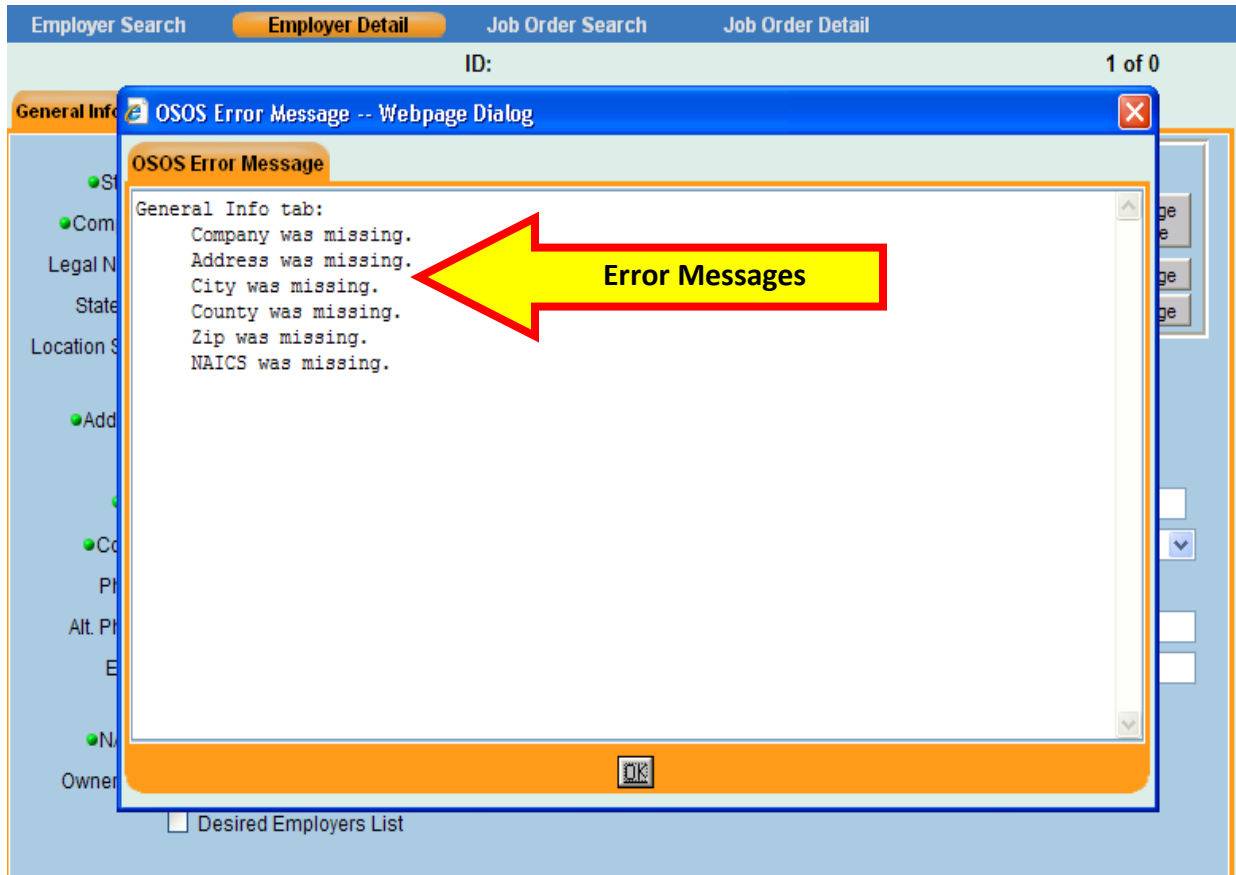


The screenshot shows the OSOS interface with the 'EMPLOYER' tab selected. The employer name is 'KATE'S CAKES' and the ID is 'NY010060604'. The 'Job Orders' tab is highlighted with a yellow arrow. Below the tabs is a table with the following data:

Order #	Job Title	Office	Status
Listing Date	O*Net Title	Staff Assigned	Contact Name

## SAVING YOUR BUSINESS JACKET

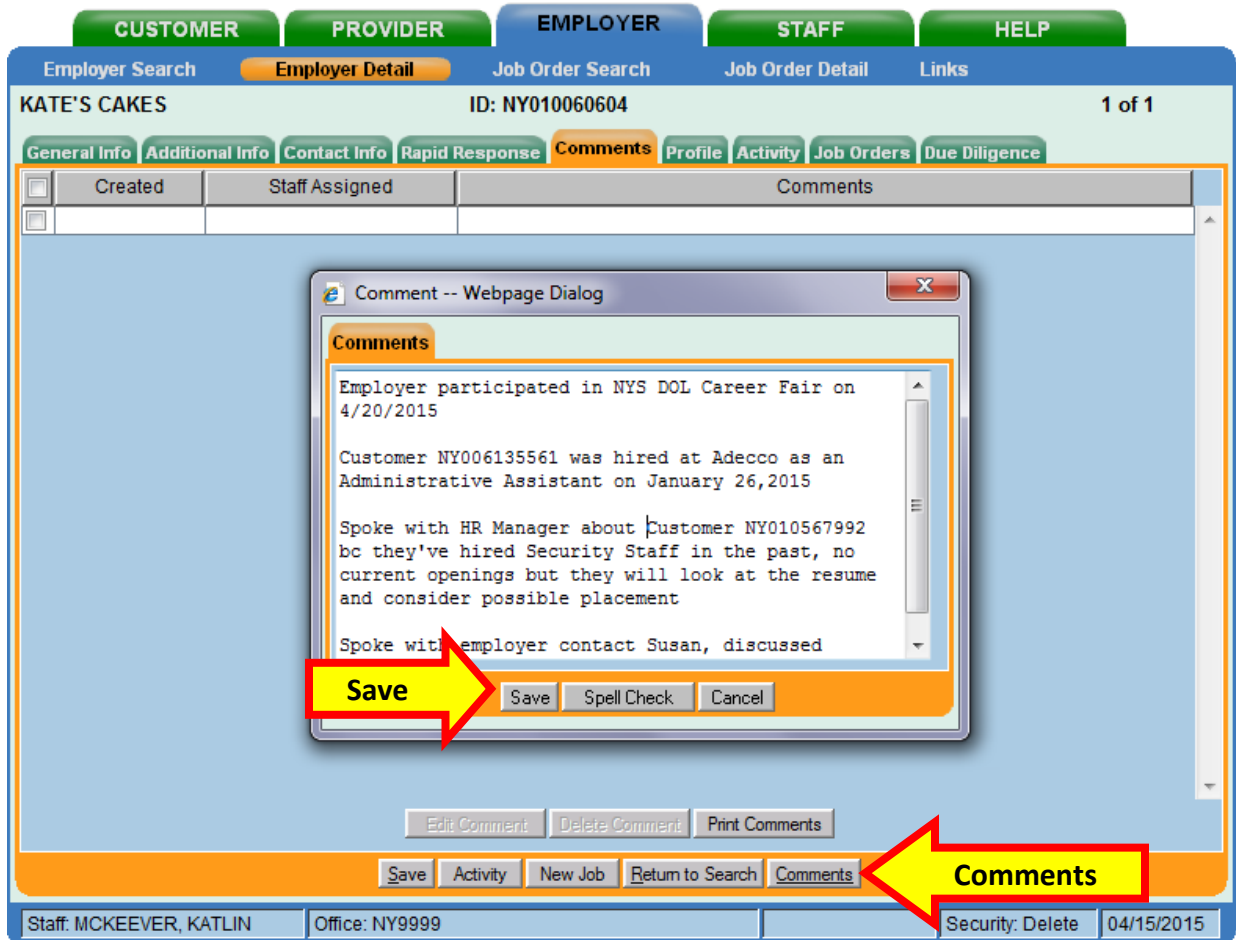
A new employer record cannot be saved until all of the required information is completed. An error pop-up message will appear if any required information has not been entered.



## ADDING COMMENTS TO A BUSINESS JACKET

Be sure to include comments when any services or information is provided to a business.

Recording comments will improve communication between staff to prevent any overlapping of outreach.



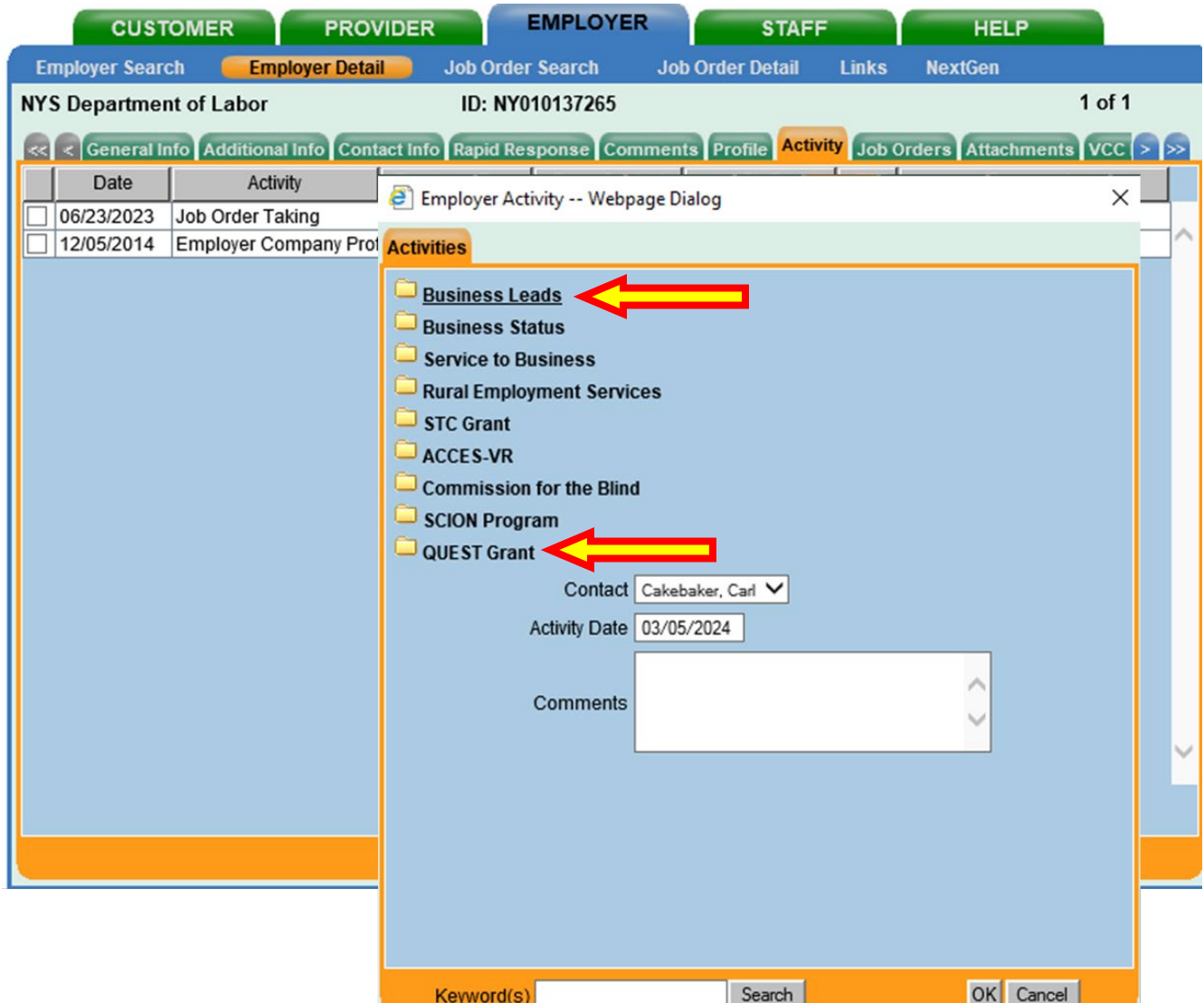
The screenshot displays the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail (selected), Job Order Search, Job Order Detail, and Links. The main content area shows the business jacket for "KATE'S CAKES" with ID: NY010060604. The "Comments" tab is selected, showing a table with columns for "Created", "Staff Assigned", and "Comments". A dialog box titled "Comment -- Webpage Dialog" is open, containing a text area with the following text: "Employer participated in NYS DOL Career Fair on 4/20/2015", "Customer NY006135561 was hired at Adecco as an Administrative Assistant on January 26,2015", "Spoke with HR Manager about Customer NY010567992 bc they've hired Security Staff in the past, no current openings but they will look at the resume and consider possible placement", and "Spoke with employer contact Susan, discussed". A red arrow points to the "Save" button in the dialog box. At the bottom of the dialog box, there are buttons for "Save", "Spell Check", and "Cancel". Below the dialog box, there are buttons for "Edit Comment", "Delete Comment", and "Print Comments". At the bottom of the main content area, there are buttons for "Save", "Activity", "New Job", "Return to Search", and "Comments". A red arrow points to the "Comments" button. The footer of the application shows "Staff: MCKEEVER, KATLIN", "Office: NY9999", "Security: Delete", and "04/15/2015".

## ENTERING BUSINESS ACTIVITIES IN OSOS UNDER THE QUEST GRANT

For help with recording business activities see:

<https://dol.ny.gov/system/files/documents/2021/06/osos-guide-employer-search-and-employer-jacket.pdf>

The activities related to the QUEST Grant can be found in the Business Leads and Quest Grant folders.



The screenshot shows the OSOS interface for an Employer. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below this, there are sub-tabs for Employer Search, Employer Detail (selected), Job Order Search, Job Order Detail, Links, and NextGen. The main header displays "NYS Department of Labor" and "ID: NY010137265". A secondary navigation bar includes tabs for General Info, Additional Info, Contact Info, Rapid Response, Comments, Profile, Activity (selected), Job Orders, Attachments, and VCC. A table lists activities with columns for Date and Activity. Two activities are shown: "06/23/2023 Job Order Taking" and "12/05/2014 Employer Company Prof". A dialog box titled "Employer Activity -- Webpage Dialog" is open, showing a tree view of activity categories. Two red arrows point to "Business Leads" and "QUEST Grant". Below the tree view, there are fields for Contact (Cakemaker, Carl), Activity Date (03/05/2024), and a Comments text area. At the bottom of the dialog, there are fields for Keyword(s), Search, OK, and Cancel.

Date	Activity
06/23/2023	Job Order Taking
12/05/2014	Employer Company Prof

- Business Leads
- Business Status
- Service to Business
- Rural Employment Services
- STC Grant
- ACCES-VR
- Commission for the Blind
- SCION Program
- QUEST Grant

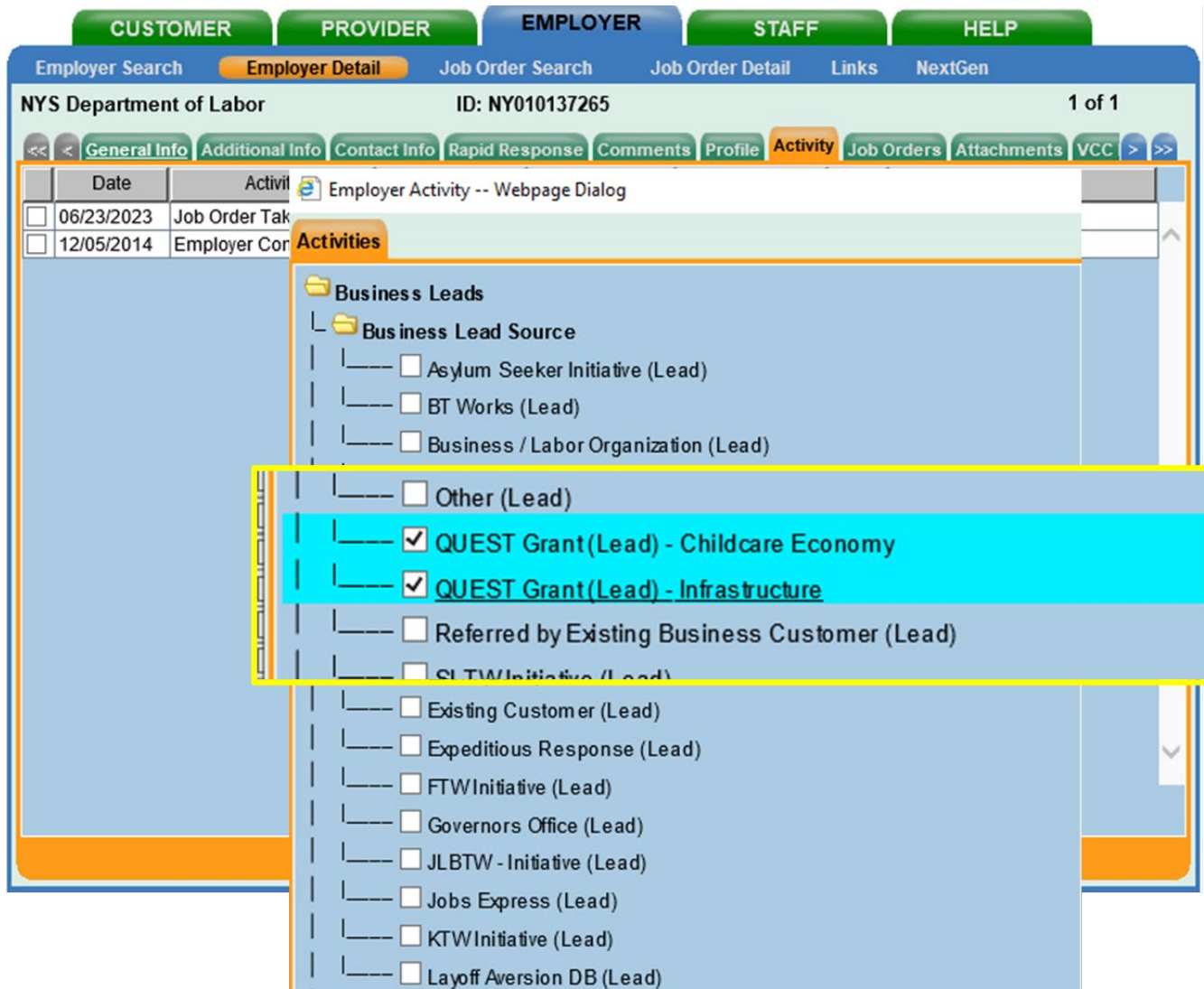
Contact: Cakemaker, Carl  
Activity Date: 03/05/2024  
Comments: [Text Area]



## ENTERING BUSINESS LEAD SOURCE ACTIVITIES IN OSOS

Click the Business Leads folder to view the Business Lead Source folder.

Record the Business Lead Source when working with a new business, or defining a business as a lead for the Quest Grant Initiative related to Infrastructure or the Childcare Economy.



The screenshot shows the OSOS interface for an Employer Detail page. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below this, there are sub-tabs for Employer Search, Employer Detail (selected), Job Order Search, Job Order Detail, Links, and NextGen. The main header displays "NYS Department of Labor" and "ID: NY010137265".

The "Activity" tab is selected, showing a table with columns for Date and Activity. Below the table, a list of Business Lead Source options is displayed, with two options checked:

- QUEST Grant (Lead) - Childcare Economy
- QUEST Grant (Lead) - Infrastructure

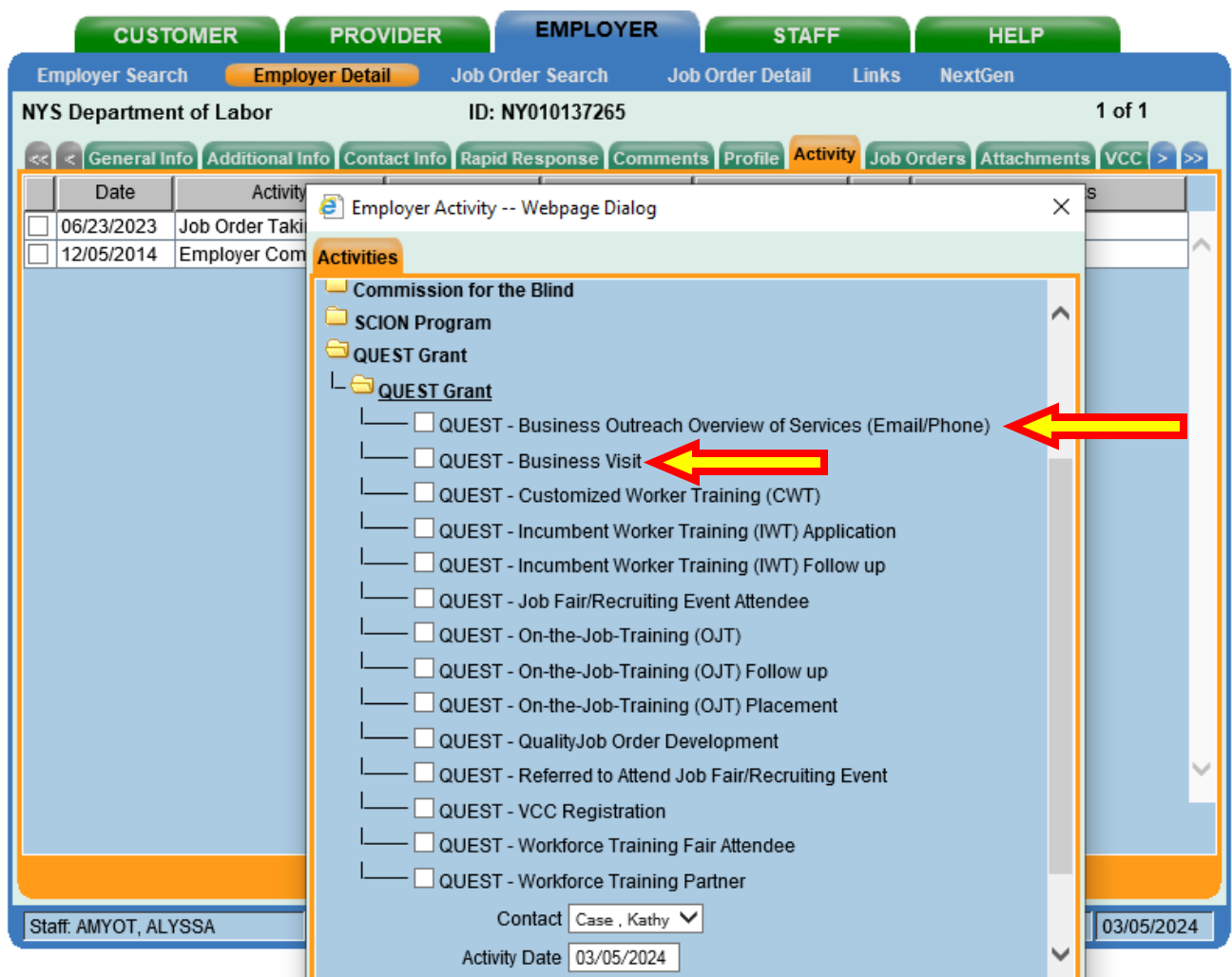
Other options in the list include: Asylum Seeker Initiative (Lead), BT Works (Lead), Business / Labor Organization (Lead), Other (Lead), Referred by Existing Business Customer (Lead), SLTW Initiative (Lead), Existing Customer (Lead), Expeditious Response (Lead), FTW Initiative (Lead), Governors Office (Lead), JLBTW - Initiative (Lead), Jobs Express (Lead), KTW Initiative (Lead), and Layoff Aversion DB (Lead).

## ENTERING BUSINESS OUTREACH ACTIVITIES IN OSOS

As Business Outreach occurs track the following items on the business jacket.

For the QUEST Grant, when business outreach occurs track the following items on the business jacket.

Click the QUEST Grant folder to select the Business Outreach Overview of Services (E-mail/Phone) or Select the Business Visit when meeting the Business Onsite.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail (selected), Job Order Search, Job Order Detail, Links, and NextGen. The main header displays 'NYS Department of Labor' and 'ID: NY010137265'.

The 'Activity' tab is active, showing a list of activities. A table on the left lists activities with columns for 'Date' and 'Activity':

Date	Activity
06/23/2023	Job Order Taki
12/05/2014	Employer Com

The main content area shows a tree view of folders and activities. The 'QUEST Grant' folder is expanded, revealing a list of activities with checkboxes:

- QUEST - Business Outreach Overview of Services (Email/Phone)
- QUEST - Business Visit
- QUEST - Customized Worker Training (CWT)
- QUEST - Incumbent Worker Training (IWT) Application
- QUEST - Incumbent Worker Training (IWT) Follow up
- QUEST - Job Fair/Recruiting Event Attendee
- QUEST - On-the-Job-Training (OJT)
- QUEST - On-the-Job-Training (OJT) Follow up
- QUEST - On-the-Job-Training (OJT) Placement
- QUEST - QualityJob Order Development
- QUEST - Referred to Attend Job Fair/Recruiting Event
- QUEST - VCC Registration
- QUEST - Workforce Training Fair Attendee
- QUEST - Workforce Training Partner

At the bottom, there is a 'Contact' dropdown menu set to 'Case, Kathy' and an 'Activity Date' input field set to '03/05/2024'. A staff member 'AMYOT, ALYSSA' is listed at the bottom left.





*Quality outreach is speaking to someone from the business. Leaving a message does not count as an outreach activity.*

## SERVICES TO BUSINESSES OSOS ACTIVITIES UNDER THE QUEST GRANT

- Customized Worker Training
- Incumbent Worker Training
- Job Fair/Recruiting Event Attendee
- On-the-job Training
- Quality Job Order Development
- Referred to Attend Job Fair/Recruiting Event
- VCC Registration
- Workforce Training Fair Attendee
- Workforce Training Partner

The screenshot displays the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail (selected), Job Order Search, Job Order Detail, Links, and NextGen. The main header shows "NYS Department of Labor" and "ID: NY010137265". A secondary set of tabs includes General Info, Additional Info, Contact Info, Rapid Response, Comments, Profile, Activity (selected), Job Orders, Attachments, and VCC. The main content area is a table with columns for Date and Activity. A modal window titled "Employer Activity -- Webpage Dialog" is open, showing a tree view of activities under the "QUEST Grant" category. The activities listed are:

- Commission for the Blind
- SCION Program
- QUEST Grant
  - QUEST - Business Outreach Overview of Services (Email/Phone)
  - QUEST - Business Visit
  - QUEST - Customized Worker Training (CWT)
  - QUEST - Incumbent Worker Training (IWT) Application
  - QUEST - Incumbent Worker Training (IWT) Follow up
  - QUEST - Job Fair/Recruiting Event Attendee
  - QUEST - On-the-Job-Training (OJT)
  - QUEST - On-the-Job-Training (OJT) Follow up
  - QUEST - On-the-Job-Training (OJT) Placement
  - QUEST - Quality Job Order Development
  - QUEST - Referred to Attend Job Fair/Recruiting Event
  - QUEST - VCC Registration
  - QUEST - Workforce Training Fair Attendee
  - QUEST - Workforce Training Partner

At the bottom of the modal, there is a "Contact" dropdown menu set to "Case, Kathy" and an "Activity Date" field set to "03/05/2024".



*If a business contact expresses interest in other services direct them to a Business Services Representative.*

## **RESOURCES AND ASSISTANCE**

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

<http://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)