

OSOS Business Services

| STC GRANT (SHORT TIME COMPENSATION) SHARED WORK (SW) SALES TEAMS | | |
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| <u>SERVICE</u> | <u>DEFINITION</u> | <u>COMMENTS</u> |
| SW CUSTOMER INTEREST SOURCE | A lead resulting in staff research identifying that a business should be contacted for possible Shared Work participation and other appropriate services. | Staff should complete advance research before the initial contact with the business to anticipate service needs. |
| SW - Interest Source BI | <p>Enter activity when staff conducts general BI (Business Intelligence) research that identifies a businesses that <i>will likely</i> benefit from Shared Work participation.</p> <p>Note: Examples of sources include, but are not limited to:</p> <ul style="list-style-type: none"> • Alerts through Career Center system • OSOS • Layoff Aversion Dashboard • Company website (About Us webpage, recent press releases, etc.) • Business information websites such as manta.com, glassdoor.com, etc. • Recent online media reports (local/national newswires, local | Record comments regarding this lead source in the COMMENTS tab, but not in the Activity's Comments section. |

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| | <p>Chambers of Commerce newsletter, etc.)</p> <ul style="list-style-type: none"> • Google • Social media • Partner agency • Business association • Chamber of Commerce | |
| SW - Interest Source D & B Report | Enter activity when lead researched through the confidential monthly D&B (Dun & Bradstreet) Layoff Aversion monthly report. | <p>Do not record comments regarding this lead source in the COMMENTS tab or in the Activity's Comments section.</p> <p>Note: Informally maintain date of research, source(s) and preliminary information.</p> |
| SW – Interest Source EW Report | Enter activity when lead researched through confidential EW (Early Warning Report) weekly report. | <p>Do not record comments regarding this lead source in the COMMENTS tab or in the Activity's Comments section.</p> <p>Note: Informally maintain date of research, source(s) and preliminary information.</p> |
| SW - Interest Source Mass Mailing | Enter activity when lead resulted from NYSDOL quarterly postcard mailing (two sided - Shared Work & Business Services) targeting industry sectors. | Record comments regarding this lead source in the COMMENTS tab, but not in the Activity's Comments section. |
| SW - Interest Source Info Phone# | <p>Enter activity when lead referred from Shared Work sales phone number (518) 549-0495.</p> <p>Note: Phone number appears in post card and Shared Work webpage. Activity should not be taken if post card is the lead source.</p> | Record comments regarding this lead source in the COMMENTS tab, but not in the Activity's Comments section. |

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| <p>SW - Interest Source Email Box</p> | <p>Enter activity when lead referred from Shared Work sales email box sharedworkinfo@labor.ny.gov.</p> <p>Note: Appears in post card and Shared Work webpage. Activity should not be taken if post card is the lead source.</p> | <p>Record comments regarding this lead source in the COMMENTS tab, but not in the Activity's Comments section.</p> |
| <p>SW – Interest Source Other Referral</p> | <p>Enter activity used when the received lead does not meet the definition of the other 6 options in this category.</p> | <p>Record comments regarding this lead source in the COMMENTS tab, but not in the Activity's Comments section.</p> |
| <p>SW SALES CONTACT</p> | <p>Staff initial telephone or interim outreach to a business considering the Shared Work Program. Interim outreach may be via telephone, email or field visit.</p> | |
| <p>SW - Initial Contact (Telephone)</p> | <p>Enter this activity when a meaningful discussion occurs with a business newly interested in Shared Work.</p> <p>Note: Develop a new Business Jacket if one does not already exist.</p> | <p>In the COMMENTS tab, record date of contact, name/job title of business representative, concise summary of initial discussion and presented services selectively offered. Indicate interest resulting, e.g., Shared Work, information materials sent and next step follow up.</p> <p>If business is considering expansion, document referring matter to Associate Business Services Representative for follow up and timely involvement with Career Center system, e.g. Shared Work interest, posting of job order(s); customized recruitment(s); NYS Job Bank; On-the-Job</p> |

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| | | <p>Training grant(s), tax credit(s), human resource consultation, etc..</p> <p>If business is considering layoffs, document referring matter to regional Rapid Response coordinator for follow up and planning early job placement (inclusive of appropriate training grant options) service before layoffs occur.</p> |
| SW - Interim Contact (Telephone) | Enter activity when scheduled to follow up (via telephone) with the business to check on the status of considering/applying for Shared Work. | In the COMMENTS tab, record date of contact, name/job title of business representative, concise summary of Shared Work consideration status. |
| SW - Interim Contact (Email) | Enter activity when scheduled to follow up (via email) with the business to check on the status of considering/applying for Shared Work. | In the COMMENTS tab, record date of contact, name/job title of business representative, concise summary of Shared Work consideration status. |
| SW - Interim Contact (Field Visit) | Enter activity when scheduled to follow up (via field visit if requested by the business customer) to check on the status of considering/applying for Shared Work. | In the COMMENTS tab, record date of contact, name/job title of business representative, concise summary of Shared Work consideration status. |
| SW – Response Contact Info Phone #/Email Box | <p>Enter this activity after discussion with a business generated through the Shared Work sales phone number or Shared Work sales email box.</p> <p>Note: develop a new business jacket if one does not already exist.</p> | In the COMMENTS tab, record date of contact, name/job title of business representative, concise summary of discussion and presented services selectively offered. Indicate to which Shared Work sales member the business information was |

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| | | forwarded to for regional initial contact. |
| SW FIELD VISIT | Staff conducting a field visit to further explain Shared Work to management, labor union (if attached) and/or employees. | |
| Field Visit – Business Organizations | Enter activity when conducting onsite to explain Shared Work to business organizations, e.g, chamber of commerce, human resource association, business/industry associations, etc. | In the COMMENTS tab, record date of visit, name of the organization, describe the audience’s general response and planned next steps. |
| Field Visit – Management/Union Presentation | Enter activity when conducting onsite to explain Shared Work to management and/or union representation. | In the COMMENTS tab, record date of visit, describe business’ general response and planned next steps. |
| Field Visit - Employee Presentation | Enter activity when conducting onsite visit to explain Shared Work to employees (prospective or current claimants). | In the COMMENTS tab, record date of visit, describe employee’s general response, number of attendees and planned next steps. |
| SW APPLICATION STATUS | Stage of business’ Shared Work | |

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| | application status. | |
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| SW - Application Approved | Enter activity when Shared Work application has been approved by Liability & Determination (L&D) Unit. | In the COMMENTS tab, record date that the application was approved. |
| SW ADVISORY ASSISTANCE | Staff answering questions by businesses/unions or employees applying/participating in Shared Work and employees. | |
| SW - General Assistance to Business (Telephone) | Enter activity when answering (via telephone) standard/technical questions from a business regarding the application process or existing participation in Shared Work. | In the COMMENTS tab, record date of contact, name/job title of business representative, concise summary of question(s) and assistance provided. |
| SW - General Assistance to Business (Email) | Enter activity when answering (via email) standard/technical questions from a business regarding the application process or existing participation in Shared Work. | In the COMMENTS tab, record date of contact, name/job title of business representative, concise summary of question(s) and assistance provided. |
| SW - Referral for Assistance (Business – L&D Unit) | Enter activity when a referral is made to L&D Unit for in-depth assistance to a business in the application process or currently participating in | Do not record in COMMENTS tab. Note: Informally maintain date of contact, name/job title of business representative, concise summary of question(s) and |

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| | Shared Work. | name/job title of L&D staff person receiving the referral. Follow up with the customer for quality assurance. |
| SW - General Assistance to Employee (Telephone) | Enter this activity when answering (via telephone) standard/technical claimant questions from an employee currently participating in Shared Work | In the COMMENTS tab, record date of contact, name/job title of employee, concise summary of question(s) and assistance provided. |
| SW - General Assistance to Employee (Email) | Enter activity when answering (via email) standard/technical claimant questions from an employee currently participating in Shared Work | In the COMMENTS tab, record date of contact, name/job title of employee, concise summary of question(s) and assistance provided. |
| SW - Referral for Assistance (Employee – Shared Work Benefits Unit) | Enter activity when a referral is made to the Shared Work Benefits Unit for in-depth assistance to a claimant currently participating in Shared Work. | Do not record in the COMMENTS tab. Note: Informally date of contact, name/job title of business representative, concise summary of question(s) and name/job title of Shared Work Benefits Unit staff person receiving the referral. Follow up with the customer for quality assurance. |
| SW - Referral of Assistance (Business Services) | Enter activity when a referral is made to Business Services for assistance, e.g., recruitments, training grants, tax | In the COMMENTS tab, record date of contact, name and job title of the business representative, a concise summary of the service request and name and job title of the |

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| | credits, etc. | Business Services staff person receiving the referral. |
| SW - Referral of Assistance (Rapid Response) | Enter activity when a referral is made to Rapid Response for early job placement assistance involving planned layoffs/closures. | In the COMMENTS tab, record date of contact, name and job title of the business representative, a concise summary of the service request and name and job title of the Rapid Response staff person receiving the referral. |