Good afternoon! My name is Ruth Pillittere and I work in the Business Services Unit here in Albany. Presenting with me today is Brian Suedkamp, the Capital Region Associate Business Services Representative.

We have a lot of information to cover today so we will be holding all questions until the end of the presentation. If you have something you’d like to ask, please submit your question using the Chat Feature.
Today we will walk you through the various steps needed to match a customer to a job order – as well as matching a job order to a customer. We will also walk you through how to post a referral once a match has been made and saved.

But first we will start with the customer record.
Customer Records

- Need to ensure quality information in the customer record.
- Job match is only as good as the information in the customer record.
- Prior work experience and education are key elements for a good job match.

It is very important that you have complete information in the customer’s record in order to have a quality job match.

If you are meeting with a customer and you notice missing fields, ask those questions and enter those fields.

Job Orders often list specifics educational requirements or a required number of years of past experience.

Without a complete record we will be unable to perform quality matches:
• A good person may not come up on your match
• If they do, you will not be able to validate certain data elements to determine if they are really qualified for the position
For today’s training we are using a fictitious record.

General Info
When updating or entering a new customer record in OSOS, always think to yourself “What do I need to add so that we can make quality job matches for this customer?” on the general info tab pay special attention to education, contact information and status. When meeting with the customer ask if their educational status has changed, maybe they completed a degree program from the last time we met with them. You will also need accurate address, phone and email information on the customer. You will also want to make sure that the customer’s status and Job Seeker status in set as active.
Additional Info

Employment Preference is completed – FT work on First Shift at $12 an hour. Make sure this information is current.

We also know that this person is not disable, not a migrant worker and not a veteran
Objective

On the customer’s objective tab we are concerned with correct O*net titles. O*net titles will directly impact a quality match. We suggest having at least two O*Net titles. For more information on how to use the O*Net functions in OSOS please refer to the Using O*net in OSOS guide that is located on the internet under the workforce professionals section.

In this example we see this person is interested in a payroll clerk position.

We also see that they have past experience which is useful information when an order requires a set amount of past experience as a minimum qualification.

Employment Objective: This section is often left blank and it's important to complete it so we really know the type of work the individual is interested in pursuing. Becomes important when a person is changing careers – we don’t want to match to a prior field if no longer interested in that type of work.
Work History

We see two past jobs – one as a payroll clerk and one a receptionist. Remember the objective was to gain employment as a payroll clerk so you should not be matching them for receptionist jobs.

You also get a sense of past job duties so you start to get a picture of their skill sets; salary range and reason for leaving.

Make sure that each job entry is complete with job duties listed. When identifying possible job matches need to look at the typical duties for the position vs. what customer did in past positions.
Education and License:

The Education tab also has a big impact on a match. If the customer’s record indicates that they have an advanced degree such BA, BS or masters listed on their general detail tab, the school section should also be completed.

When a job order required a degree they will generally list the degree areas and study they are looking for. So for instance if we have a customer that is an Engineer that has a BS, we need the School section completed to indicate the actual degree program/course of study. There is a big difference from the civil engineer to the electrical or chemical engineer, and we can not finish the match if we do not know if they meet the minimum quals.
Skills:
The skill section is especially important for our customers that do not have degrees. We need to make sure they have the skills required for the job. This section should list specific tools the customer is skilled in as well. So for instance, in this example our customer does not have a degree but she has experience with key software tools for her occupation of payroll clerk.- Peoplesoft, kronos software
Comments:

With every record you should take a quick look at the comments entered for the customer. This is where important information may be listed that could impact our match and referral. For instance an ex-felon that cannot work with children, or the customer cannot work with money…
The ABCs of Matching
What is Matching? Not a Services, Won’t extend enrollment. 
First step in the process!
Matching is process whereby we compare the information on the customer’s record with information on open job orders to see if we can find a good connection between the person’s part experience and education with the business’s needs / requirements.
When you have a customer at your desk, and you’ve completed the update of their record – you should be running a match to see if there are any current, open job orders in the system that are a good fit for the customer.

Even after the customer has left your desk, you should continue to match the customer to job orders. For example, you may do this a few days after your initial appointment to see if any new job orders were posted to the system that may be a good fit for the person.

REMEMBER TO SAVE ALL OF YOUR MATCHES!!

You can also match from the Job Order to the Customer but we will cover that later in the presentation.
**Best Practices for Matching**

- Determine if your customer is qualified for the position.
- The key to a good customer match is an accurate, up to date OSOS customer record.
- Compare the job order with the customer detail information in OSOS.
Let’s start matching a Customer to a Job Order:

- We will begin on the Customer Module, Customer Search, Quick Search tab – so we can locate the individual’s record on OSOS.

**Best Practice:**

- If you do not have the customer’s NYOSOS ID # or SSN # -- Use the customer’s last and first name. If too many results come up (common with some names, like Smith) add the customer’s zip code (found under the Geographic tab).

- If you use the customer’s OSOS ID # or SSN # you CANNOT use any other search criteria with it.

- Hit the “Search” button.
We have found our customer – Buster Malinak.

The first thing we want to check is that the customer has an “Active” OSOS Status and an Active Job Seeker Status.

WHY?? Because this ensures that the person is currently actively engaged in the job seeking process. Do not want to target someone that is not looking for employment.
Best Practice

When reviewing a customer record it’s important to review these items to 1) ensure information is current and 2) to give you a preliminary idea of what types of jobs for which the customer may be eligible.

Comments Section is another important tab to review. There may be information there that doesn’t fit into the fields on various tabs but it important in finding a quality match. For example, they may have transportation issues, or lifting restrictions, or are unable to work in certain locations.
Moving across the various tabs – Additional Information

- Work Week (Any, Fulltime, Part time), Duration (Regular/Regular or Temporary/Temporary) and Shift Preference (1st, 3rd) allow you to know person’s preferences or limitations (can’t do 3rd shift due to child care issues).
- This information will carry over to the job order search.

- Is you customer a Veteran? Mark it here so they can be flagged for any special programs or services.
- You should follow your office’s Vet policy and refer them to your Vet staff.
Next is the Objective tab – why type of work does this customer say they want to pursue.

Focus on the red box area: This is where you will list desired titles (usually based on past work history) and an acceptable job location radius. Green dots indicated a required field so these must be populated.

This information will be automatically brought into the job order search when you start the Match. Specifically the customer’s O*Net Title and Maximum Zip Radius information (the distance the customer is willing to travel for a job).

If a customer has more than one O*Net title listed – Match process will import the first one listed under the Desired O*Net section – in our example, Electrician. If you highlight another title before starting the match process (say the Cashier position), that job title would be carried over to the job order search.
Next: Work History tab.

- The Work History tab contains the record of the customer’s previous employment. You can see that there are two past jobs listed at the bottom of the screen. The information at the top of the screen is related to the first job – electrician. If you want to see the “Detail” for the “Helpers – Electricians” than you need to select the small white box next to the job title.

**Why is Work History important?** The job opening that you are looking to place your customer in should be realistic and related to the customer’s work objective and work history.

- We didn’t include slides here but you should continue across all the tabs – Education / Licenses, Skills and Comments – to see if there is other information that would be helpful in finding a quality match.
- So you’ve completed your review of the customer’s record and you are ready to start matching them to open job orders.

- Click on the **Start Match** button at the bottom of the screen to start the matching process.

- The **Start Match** button is active on all of the Customer Detail tabs we just went through so you can begin this process at any time. But again we strongly encourage you to review all of the customer’s information to ensure it is current and you have a good picture of what type of jobs would be appropriate.
- Clicking on the **Start Match** button will leave the Customer Module and move over to the Employer Module - Job Order Search Window.
- You can now begin to search for a job openings that match your customer’s qualifications.
Here is a full view of the Employer Module – Job Order Search – Quick Search tab.

Since you don’t have specific job order numbers to begin with, this screen will be left blank.

However, as you move through the other tabs, you will see that some information from the Customer’s Record will auto populate here.
As you can see, we’ve moved over to the “General Info” tab and the O*Net Title – Electrician – and Job Location (25 mile radius of the customer’s home zip code – have been automatically filled in with data from the Customer Detail Record.

Remember we talked about this back on Slide 13.
We continue to move across the tabs to the “Job Detail” tab.
Education Required will fill in automatically from the Customer Detail Record.
After reviewing the General Info and Job Detail tabs to ensure the customer’s information moved over correctly, you can begin to look for jobs that match your customer’s profile by clicking on the Search button in the lower menu bar.
In this example, we have returned No Matches. If this occurs, you need to go back to the General Info tab and change/remove data in some of their fields. For example, you may need to broaden O*Net Title and/or increase the radius of the job location; and try your search again.

If no results are returned and the customer hasn’t specified that they are only looking for one career field you can try searching for another job title (O*Net Title), listed on the Objective tab of their Customer Detail Record. In this example, if no job matches were found using the customer’s primary O*Net title of Electrician you could try to find a job match for the customer using Cashier or Helpers-Electrician. (Slide 13)

If you continue to return no matches, and the experience field is populated (Slide 13), change the experience field to 0 and/or leave blank. **WHY?** If the person has 3 years of experience but a job states 4 is needed, this person will not come up in your match.
This is an example of a successful search: You see at the bottom of the page there are 6 job orders for Electrician displayed.

The key search parameters in this example were the search criteria of O*Net title (Electrician) & the customer’s preference of finding a job within 25 miles of his zip code (12189) so we did not have to modify either of those fields.
At this point in the Match operation, if your Job Order Search returns any search results, the Save Search button will become active. This button allows you to save the search parameters used in this Match operation so that the search can be performed again later.

The saved searches should be used only if you are going to re-run the search in a timely manner because the customer’s objective or job location information can change. Remember earlier we recommended you re-running the search a few days after you meet with the customer to see if any new job orders have come into the system.

To save your search, click on the Save Search button, name your search in the Save Search Dialog Box & click Submit. All saved searches will be listed on the Saved Searches tab of the customer’s record in the Customer Detail Window for later use.
Here we are showing you the Saved Searches tab of the customer’s record in the Customer Detail Window.

Best Practice: When you name the search - use the date that you saved the search parameters so that if you use the same job order search at a later date you can tell when it was last used.
Once you’ve saved the search criteria for a later search (if needed) you need to review the job orders that you found to see which ones are the best fit for the customer.

Highlight the job orders that you would like to review by clicking on the check box next to the employer’s name.

If you want to highlight all the orders, select the white box in the header line next to Company Name.
- Highlighting the job orders will activate the Detail button.

- Click on the Detail button to activate the Job Order Detail Window. The job orders will be placed in the Job Order Detail Window for review.
As you scroll through the job order records you can tag the job orders that are the best fit for your customer. Review the information on the first 5 tabs.

You can navigate between the Job Order Detail Window and the Customer Detail Window in the Match Mode process to review both the job order and the customer qualifications.

If you decide to match a job order after reviewing it in the Job Order Detail Window you click the Tag button at the bottom of the Window. This will make it easier for you to keep track of multiple job orders.

The Tag button label will change to UnTag. To deselect the job order, click the UnTag button.

Click the Return to Search button after you are finished reviewing the job orders.
As you scroll through the job order records you can tag the job orders that are the best fit for your customer. Review the information on the first 5 tabs.

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Click the Return to Search button after you are finished reviewing the job orders.
Clicking on the Return to Search button will return you to the Job Order Search Window. You will still be in Match mode. If you tagged any job orders in their Job Order Detail Windows, their search result list entries will be highlighted like in the example above.

Make sure the jobs orders that you have matched to your customer are highlighted. If you didn’t “tag” the job orders as you scroll through to review them the job orders in the search results listing will not be highlighted. You will need to highlight the job orders that you find are good job matches before posting a match.
In the Job Order Search Window the list entries that you tagged will be highlighted. Click the Post Match button. A “Job Matched” message will appear briefly in the upper right corner of the window.

Write down the Job Order # of each matched job. You will need to locate the job order to print the job order summary information to send to the customer.
A successful Match (after you click on the Post Match button), will be posted in the Customer’s record on the Customer Detail Window under the **Activities tab** and on the Services Window under the **Service History tab**.

- It will also be recorded in the Employer – Job Order Detail Window under the **Matches tab**.

- If you have a customer sitting at your desk, and they state that they are interested in applying for the position, you would then record the match as a referral. We will explain this process later in this presentation.
We’ve just covered how to match a customer record to a job order. Now we are going to cover how to match a job order to a customer(s).

ALL CC STAFF PERMISSIONS ALLOW FOR MATCHING FROM BOTH THE CUSTOMER RECORD AND THE JOB ORDER.

Job Order matching starts at the Employer Module & comparing specific information between open job orders and customers.
- Job Order Search Window.

- The most common method is to use the Job Order #. You can add multiple Job Order numbers on the Quick Search tab.

- Using the Job Order # search is a stand alone search, you don’t need to add any more search criteria.
If you don’t have a job order number to start with, you will need to do a General Search.

Fields to complete include:

- Order Status – Open
- Employer Job Title, WIB, Job Location, Company Name (if known).
- Zip and Radius fields are extremely helpful.
- Job order date From/Thru can be helpful if you know the approximate date the order was posted.

- Click on the **Search** button to start your search.
- Successful search results will be displayed on the Search Results Listing screen.

- In this example we have 5 job orders using the search criteria of Emp. Job Title/WIB & Order Status Open. Note: WIB will only yield staff entered job orders; use Job Location to include all (job central/jobs express) and a Zip Code search yields more results than using County or City.

- Highlight the job orders you wish to review & this will activate the grey Detail button.
- For multiple results you can toggle through the job orders using the arrows on the upper right.

- Review Job Orders – Job Detail, Contact Info, Job Description, Comments tab. We can only job match one job order at a time.

- Check last open date – how long is the job order open for? WHY DO WE DO THIS? If the order has been open for longer than 30 days, it is possible that the position as been filed and the business hasn’t had the chance to close the order. If you want to move forward the match / referral, be aware that the position may no longer be open. You should verify the status of the order with the business services staff to see if they know if its open. Highly competitive environment. Business overwhelmed with applications. Orders close quickly. Need to move quickly on orders b/c order could be “stale” after 2-3 weeks.
Check # of Openings, Duration, Education etc. on the Job Detail tab.

In this example the employer has specified that the company provides health insurance, vacation time, a clothing allowance & is on a public transportation line.

WHY IS THIS INFO IMPORTANT? This information is the minimum requirements of the business and sending someone who doesn’t meet these is not a quality match. Also check job description to see if there are other needed items – like a DL. Benefits are also a selling point to a job seeker that may not be sure if they are really interested in the position.
The job description contains the specifics of the job that we can compare to our customer talent bank.

- REVIEW TO SEE IF THERE ARE ANY REQUIREMENTS LISTED HERE – EXAMPLE: DL OR EDUCATION – THAT ARE NOT ON THE JOB DETAIL TAB THAT ARE IMPORTANT TO MEET MIN QUAL FOR GOOD MATCH
- We are comparing the job order requirements to the customer’s skills and work history.

- Identify any skills keywords that you could use in your customer search.

- Check Comments Tab to see if there is any additional information that would be helpful in determining a quality match. Ex. May have a comment that they are interested in hiring veterans or ex-offenders.
The Start Match button is available on all the Job Order Detail Window tabs.

Click on the **Start Match** button to start the job matching process to search for customers whose skills & work history match the job order. This will bring up the Customer Search Window.
- We are now in the Match Mode or Matching process.

- Before we start our search we need to refine our search so that we can locate our local customers that fit the job order requirements.

- We're not going to add anything to the Quick Search Screen.
- General Info tab. Start search by selecting your local WIB. This grabs the largest population of local customers to start. Depending on the results, we may come back to this screen and modify the selection to a single office to reduce the number OR remove the selection entirely to pull from a larger radius.
Still on General Info tab. Moving to the Status Button – selecting Active to ensure we’ll pulling customers that are actively looking for work.
- Moving from General Info Tab to Education Tab
- Education Tab fills in automatically from the job order.
Next move over to the Job Criteria Tab.

- O*Net, Work Week & Duration fill in automatically. Make Job Seeker field “Active”.
- If pay range was also listed on job order, that information will also populate here. If your search comes back with few to no matches, you may want to delete this information so it can draw from a larger group of job seekers.
- For example, if the order pays $11 but a candidate made $15 in the past, they will not come up in the match.
- This is also true for the Years of Experience. If the order states 5 yrs, it will draw someone with 6+ but don’t pull someone with 4 yrs exp. This is a problem b/c business may consider someone with less experience especially if they are packaged with OJT.
- Text Search Tab used to narrow down results of search if population is too large or to search for special groups of candidates
  - This screen is needed for the WFS = Work For Success and NYYW = New York Youth Works programs to identify the targeted populations for those specific programs.
- Could also be helpful with specific computer skills or to fine tune the positions – warehouse clerk vs. office clerk.
- CLEAN UP THE CUSTOMER RECORD – SKILLS TAB
- If you’re getting manageable results than this may not be needed. But if your pull yields 100s it’s another way to narrow down the pull.
• This tab helps you search for candidates that are under specific programs – like EUC – or who could fit programs - like OJT which targets LTU
• However, if you don’t need to include those limitations, you should leave it blank to draw in more candidates.
• This will enable you to also draw in candidates that may already be working but are the best fit for the business.

• Programs tab – make UI-Claimant Status “Seek” (Subject to Work Search).

• Click on the Search button to start your customer search to match our job order to a talent bank customer.

• The Search button is active on all of the Customer Search Window tabs.
- This search returned 15 customer records.

- If you return no search results or limited research results you can take out some of the search criteria.

- The less search criteria you use the more results you will get back.
Highlight the customer records that you would like to review by checking the white check box next to their names.

You can highlight all the records by clicking on the check box on the grey header row next to OSOS ID.

Click on the **Detail** button - this will place the highlighted customers in the Customer Detail Window.

You can highlight all the records by clicking on the check box on the grey header row next to OSOS ID.

Click on the **Detail** button - this will place the highlighted customers in the Customer Detail Window.
We’ve selected 5 customer records to review. These customer’s will be your possible matches.

- Is the customer a Veteran? If yes, follow your office’s policy for Veteran’s.
O*Net Title & Objective - we want to make sure that the customers experience/employment objective matches with the job order.

Notice our example doesn’t include # month experience next to O*Net titles. This information is pulled from the customer records so if it’s blank, it’s because it was never recorded. If this job order required 5 years exp we would not be able to confirm this customer was a good match b/c that information is missing. I make the point to reiterate the importance of getting a completed customer record when you meet with the individual.

NOTE: When searching from the job order side, OSOS will search all the O*Net Title’ listed on a customer’s record – as opposed to searching from the customer record, OSOS will only search the first O*Net Title listed on the customer’s Objective tab. If you don’t get the results you were hoping for, you should highlight a specific O*Net Title before starting your search.
Sometimes you may say, “Hey wait a minute! What was in the job description again?”

- Guess what!
- You can navigate between the Customer and Employer Module in the Match Mode Process to compare the job order information with the customer information.
Take a look at the Work History. This will give you a better understanding if the customer’s experience relates to the job description. Sometimes there is information in the work history that may not be related to the O*Net code but does relate to the job order.

Useful for folks interested in a career change: you can look at the transferable skills listed in the work history tab.

Is the customer’s employment objective just reviewed realistic based on their work and educational history.

NOTE: Remember the previous slide – no yrs exp next to O’Net code? Yrs experience may be listed here instead. If so, could validate required experience that way. If you see that however, remember to go back later an update those fields in the customer record.
Education/License: Used when a job requires a specific type of driver's license and/or endorsement or when a particular certification or professional license is required. Schools refer to High School, vocational or higher educational institutions.

Notice how nothing shows up under schools? This is where, if your customer has a degree, you would add what type of degree your customer has.
Additional Skills can be helpful if a Job Order’s O*Net was pulled, but the customer doesn’t list corresponding work experience. Perhaps they possess a certain skill set from other jobs not listed on their OSOS record or from training.

Remember when we used the skills info to help tailor previous matches- this is where skills information is helpful.
Comments matter- there might be work restrictions listed (can’t work near children or lifting restrictions), a poor work history with specific businesses, etc. Either way, take a moment to review the comments tab.

If we see a customer that we think is a good fit for the job opening as we review both the customer record & the job order we can **Tag** the customer record for future reference. This way you can see all of the customers you believed were a good fit. You can find tag on every screen.
After all customer records have been reviewed in the Customer Detail Window click on the **Return to Search** button.

This button will be active on all Customer Detail screens during the match process.
After selecting “Return to Search,” we’re returned to the Customer Search tab.
All of the customer records that we just Tagged during our review are now highlighted in blue on this screen.
These 3 candidates are the best possible matches for the job order.
Now that we have identified 3 customer’s that best meet the job order’s qualifications – or 3 Matches – we want to Post the Match.

Click on the Post Match button. A Customer Matched message will appear briefly in the upper right of the window.

No longer in the Match Mode Process.
When a Customer is Matched to an order, the Match will be recorded in 3 places:
- OSOS will automatically update the following tabs:
  - Employer Module – Matches tab
  - Customer Module – Activities tab
  - Customer Module – Service History

At this time you are going to contact customers to see if they are interested in the position.

DO WE SAY THAT WE WANT TO COLLECT A RESUME TO BE SHARED WITH BUSINESS SERVICES TO SHARE WITH BUSINESS OR NOT YET?

Candidates should be encouraged to apply. The job order will say how the business wants to be contacted – email, phone, web - unless it’s a suppressed job order. If suppressed, all information should be forwarded to the staffer listed on the order.

Suppressed orders are job orders where the business contact information has been removed and replaced with a DOL contact so we can review all candidates before forwarding only the best fits to the business for consideration.
To notify the customer about the job opening, you can contact them via phone, email or snail mail.

If you chose to send something in writing (email or snail mail) you can use the OSOS Correspondence function on this screen.

Click on the Correspond button to start OSOS Correspondence to generate a match letter to send to your customer or to do a mailing to multiple customers. (Check with your supervisors for the appropriate match letter to use).

There is a separate OSOS user manual on Correspondence that can be found WHERE??? VICKI???
This is the part of the Match process where you’d send correspondence to the customer. There is an OSOs User Guide on using Correspondence that you can reference. We do strongly encourage you to use Email instead of Snail Mail b/c our experience has been that we get a much better response rate from emails than from letters. It’s also faster and less expensive (paper, postage, etc.).
We’ve shown you how to match a customer to a job order AND how to match a job order to a customer.

Once a match is made (and you’ve reached out to the customers) hopefully you’ll start to get responses.

For those customers who say “YES!” they are interested in the job, you will need to record the match as a referral in OSOS.
What is a Referral? A referral is ...

A Referral is a service to the customer and will create or extend an enrollment.
What is a Referral? A referral will ...
A referral is usually done when the job seeking customer is at your desk and has agreed to pursue a particular lead OR has returned correspondence indicating that they have applied to a particular job.
• Remember when we showed you the match process from the customer record to the job order – these are the three places the match was recorded.
• The last one – the Employer Record – Job Order Detail – Matches tab – is where you need to start so you can record the referral.
• You need to start here regardless if you’re matching from the customer to the order OR from the order to the customer.
Here is a close up view of the Employer Record – Job Order Detail – Match tab.

Highlight the customer that you would like refer to the position and click on the Referral button.

A “Customer Referred” message will appear briefly in the upper right of the window and the customer will be posted on the Referrals Tab.
Just like with the Job Match, the Referral it will be recorded in OSOS in 3 locations:

- Employer Records – Job Order Detail – Referral tab
- Customer Record – Customer Detail – Activities tab
- Customer Records – Services – Services History tab
To protect customer confidentiality be careful when using a customer’s Social Security Number; use the customer’s OSOS ID whenever possible.

- Never say the customer’s SSN number out loud because it could be overheard.
- Do not leave papers with SSN numbers on your desk.
- Do not email SSN numbers.
NYOSOS data entry questions:

Help.OSOS@labor.ny.gov

Phone: OSOS Help Desk
(518) 457-6586

Thanks