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.
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 **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.
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.*

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![Image of OSOS interface showing the Set As My Defaults and Save buttons]
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.
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.
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.*

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.
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.

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.
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).
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.
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."

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.
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.
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.
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.
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.
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.

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