

Matching from the Job Order to the Customer Record OSOS Guide



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PURPOSE

This guide is intended to help staff understand the basics of how to perform Job Order matches. The guide will walk you through the steps of how to perform a Job Order Search, how to review desired Job Orders, how to search, match and refer customers to a Job Order, and how to enter new job orders for a local business.

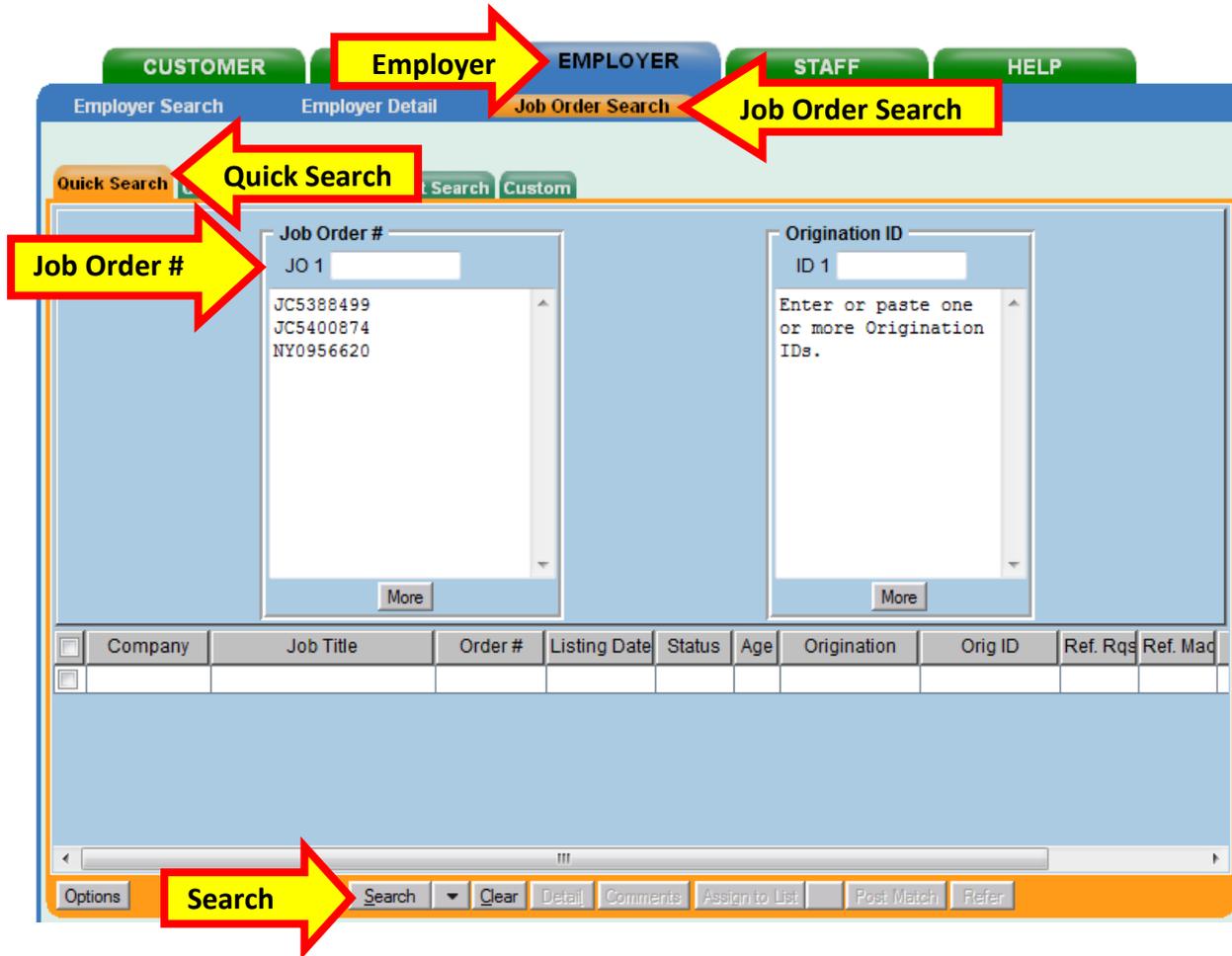
JOB ORDER SEARCH - JOB ORDER

The most common method used to search for a Job Order is by the Job Order Number.

To perform a Job Order Search in the Quick Search tab, select the **Employer module** and then the **Job Order Search window**.

Add the Job Order number or multiple Job Order numbers on the **Quick Search tab**

The Job Order Number search is a standalone search: it is not necessary to add any additional search criteria.



The screenshot shows the OSOS interface for a Job Order Search. At the top, there are navigation tabs: CUSTOMER, EMPLOYER (highlighted with a yellow arrow labeled 'Employer'), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail, and Job Order Search (highlighted with a yellow arrow labeled 'Job Order Search'). The main area has a 'Quick Search' tab (highlighted with a yellow arrow labeled 'Quick Search') and a 'Custom' tab. The 'Job Order #' field is highlighted with a yellow arrow labeled 'Job Order #' and contains the text 'JO 1'. Below this field is a list of job order numbers: JC5388499, JC5400874, and NY0956620. The 'Origination ID' field is empty and contains the text 'Enter or paste one or more Origination IDs.'. Below the search fields is a table with columns: Company, Job Title, Order #, Listing Date, Status, Age, Origination, Orig ID, Ref. Rqs, and Ref. Mac. At the bottom, there is a 'Search' button (highlighted with a yellow arrow labeled 'Search') and other buttons: Options, Clear, Detail, Comments, Assign to List, Post Match, and Refer.

JOB ORDER SEARCH - GENERAL INFO TAB

If the Job Order number is unknown, search by using the **General Info tab**.

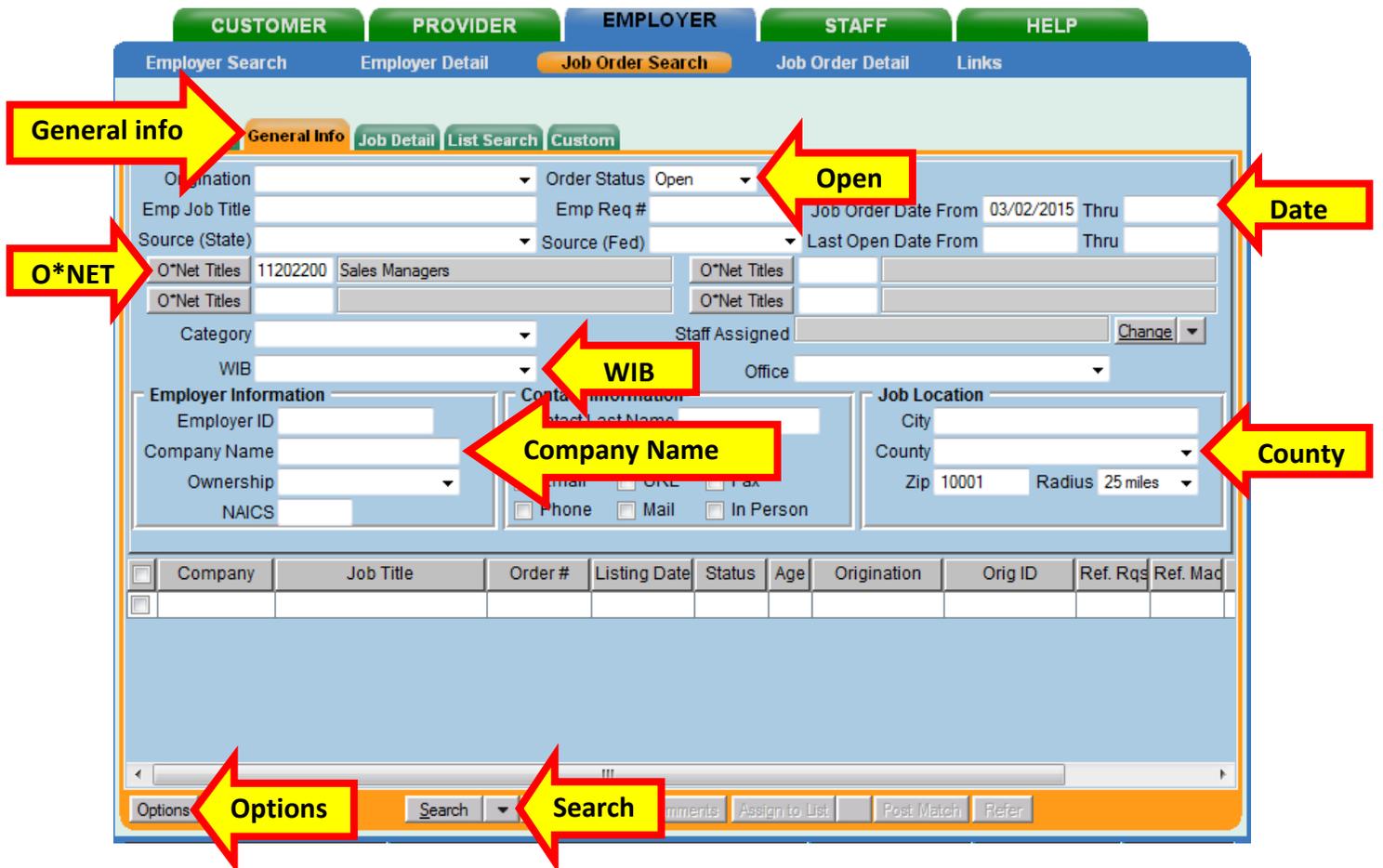
When filling out this tab leave the Order Status **Open**, do not look at closed orders when matching. Enter the O*Net Title(s), Job Location (County) and/or Company Name if there is a specific business to match for.

Suggestion: When entering the Job Order Date pick a date a week before the current date and leave "Thru" blank. This search will yield results from a week ago to the current date.

If you want to sort or print the search results, be sure to click the **Options** button and select the columns and sorting order preferred.

Click on **Search** on the bottom of the screen to start your search.

*Searching by multiple O*Net Titles will provide one inclusive set of results.*



The screenshot shows the 'Job Order Search' interface with the 'General Info' tab selected. Red arrows point to the following elements:

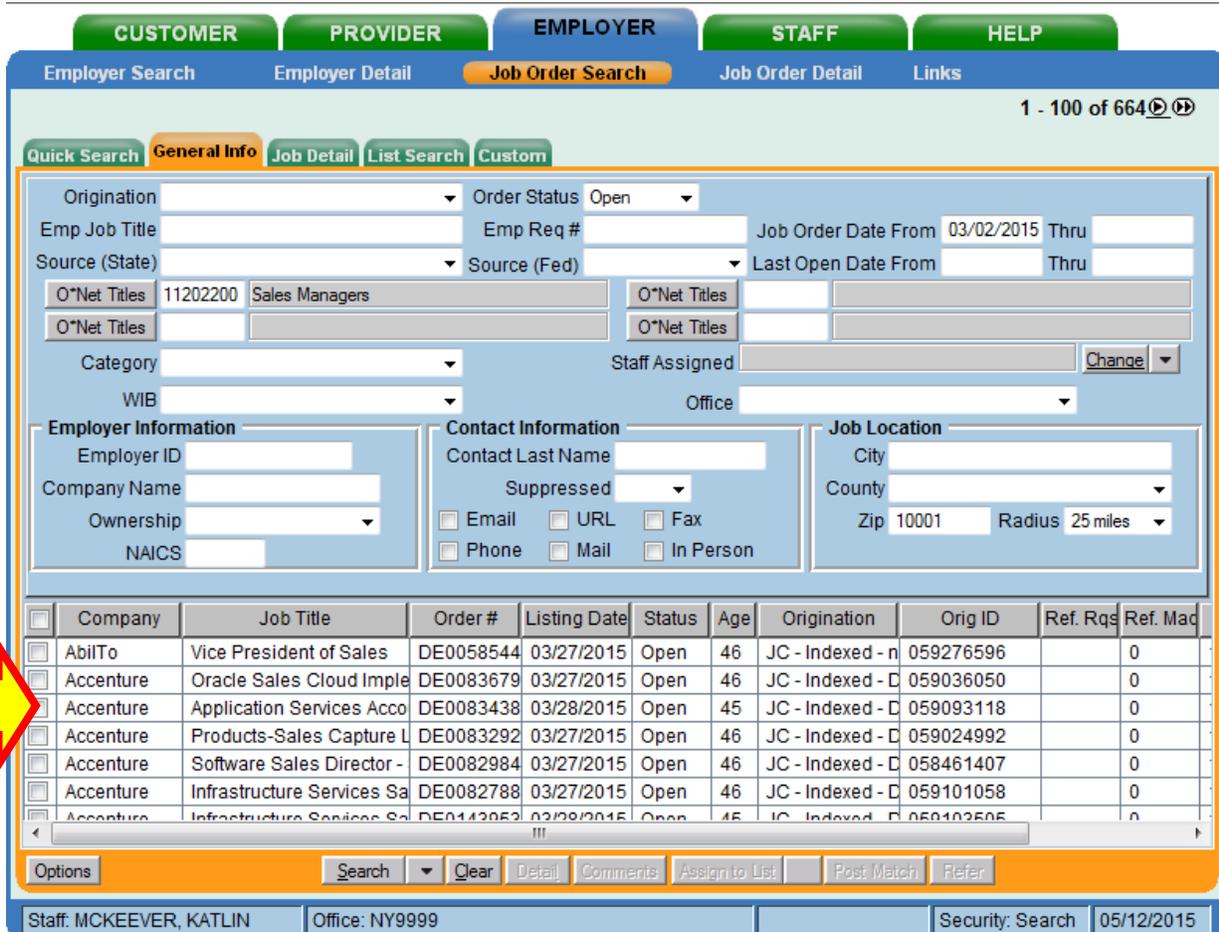
- General info**: Points to the 'General Info' sub-tab.
- O*NET**: Points to the 'O*Net Titles' input fields.
- Open**: Points to the 'Order Status' dropdown menu.
- Date**: Points to the 'Job Order Date From' and 'Thru' date range fields.
- WIB**: Points to the 'WIB' dropdown menu.
- Company Name**: Points to the 'Company Name' input field.
- County**: Points to the 'County' dropdown menu in the 'Job Location' section.
- Options**: Points to the 'Options' button at the bottom left.
- Search**: Points to the 'Search' button at the bottom center.

The interface includes a top navigation bar with 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP' tabs. Below this is a sub-navigation bar with 'Employer Search', 'Employer Detail', 'Job Order Search', 'Job Order Detail', and 'Links'. The main form contains various input fields for search criteria, a table for search results, and a bottom toolbar with buttons for 'Options', 'Search', 'Comments', 'Assign to List', 'Post Match', and 'Refer'.

JOB ORDER SEARCH RESULTS:

Successful search results will be displayed on the bottom of each Job Order Search screen.

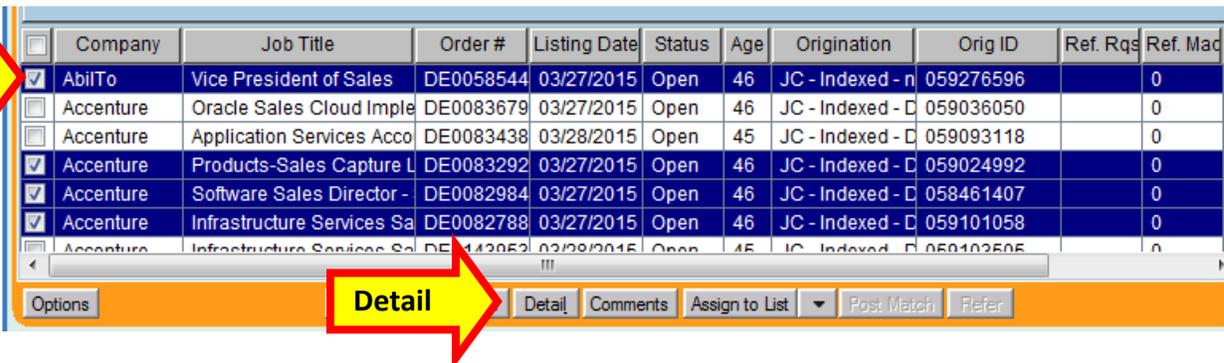
If the WIB is included in the search, the search will only yield staff-entered job orders; the more fields you enter the narrower the results will be.



The screenshot shows the OSOS Job Order Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail, Job Order Search (selected), Job Order Detail, and Links. The main search area includes various filters such as Origination, Order Status, Emp Job Title, Emp Req #, Job Order Date, Source (State), Source (Fed), Last Open Date, O*Net Titles, Category, Staff Assigned, and Office. There are also sections for Employer Information (Employer ID, Company Name, Ownership, NAICS) and Contact Information (Contact Last Name, Suppressed, Email, URL, Fax, Phone, Mail, In Person). Job Location details include City, County, Zip, and Radius. At the bottom, there is a table of search results with columns: Company, Job Title, Order #, Listing Date, Status, Age, Origination, Orig ID, Ref. Rqs, and Ref. Mad. A yellow arrow labeled 'Result' points to the first row of the table.

Company	Job Title	Order #	Listing Date	Status	Age	Origination	Orig ID	Ref. Rqs	Ref. Mad
AbilTo	Vice President of Sales	DE0058544	03/27/2015	Open	46	JC - Indexed - n	059276596		0
Accenture	Oracle Sales Cloud Imple	DE0083679	03/27/2015	Open	46	JC - Indexed - D	059036050		0
Accenture	Application Services Acco	DE0083438	03/28/2015	Open	45	JC - Indexed - D	059093118		0
Accenture	Products-Sales Capture L	DE0083292	03/27/2015	Open	46	JC - Indexed - D	059024992		0
Accenture	Software Sales Director -	DE0082984	03/27/2015	Open	46	JC - Indexed - D	058461407		0
Accenture	Infrastructure Services Sa	DE0082788	03/27/2015	Open	46	JC - Indexed - D	059101058		0
Accenture	Infrastructure Services Sa	DE0142952	03/28/2015	Open	45	JC - Indexed - D	059102505		0

Highlight the job orders you wish to review and click on **Detail** at the bottom of the screen.



This screenshot shows the same results table as above, but with checkboxes in the first column of the table. A yellow arrow labeled 'Check' points to the first row's checkbox. Below the table, a yellow arrow labeled 'Detail' points to the 'Detail' button in the action bar.

Company	Job Title	Order #	Listing Date	Status	Age	Origination	Orig ID	Ref. Rqs	Ref. Mad
<input checked="" type="checkbox"/>	AbilTo	Vice President of Sales	DE0058544	03/27/2015	Open	46	JC - Indexed - n	059276596	0
<input type="checkbox"/>	Accenture	Oracle Sales Cloud Imple	DE0083679	03/27/2015	Open	46	JC - Indexed - D	059036050	0
<input type="checkbox"/>	Accenture	Application Services Acco	DE0083438	03/28/2015	Open	45	JC - Indexed - D	059093118	0
<input checked="" type="checkbox"/>	Accenture	Products-Sales Capture L	DE0083292	03/27/2015	Open	46	JC - Indexed - D	059024992	0
<input checked="" type="checkbox"/>	Accenture	Software Sales Director -	DE0082984	03/27/2015	Open	46	JC - Indexed - D	058461407	0
<input checked="" type="checkbox"/>	Accenture	Infrastructure Services Sa	DE0082788	03/27/2015	Open	46	JC - Indexed - D	059101058	0
<input type="checkbox"/>	Accenture	Infrastructure Services Sa	DE0142952	03/28/2015	Open	45	JC - Indexed - D	059102505	0

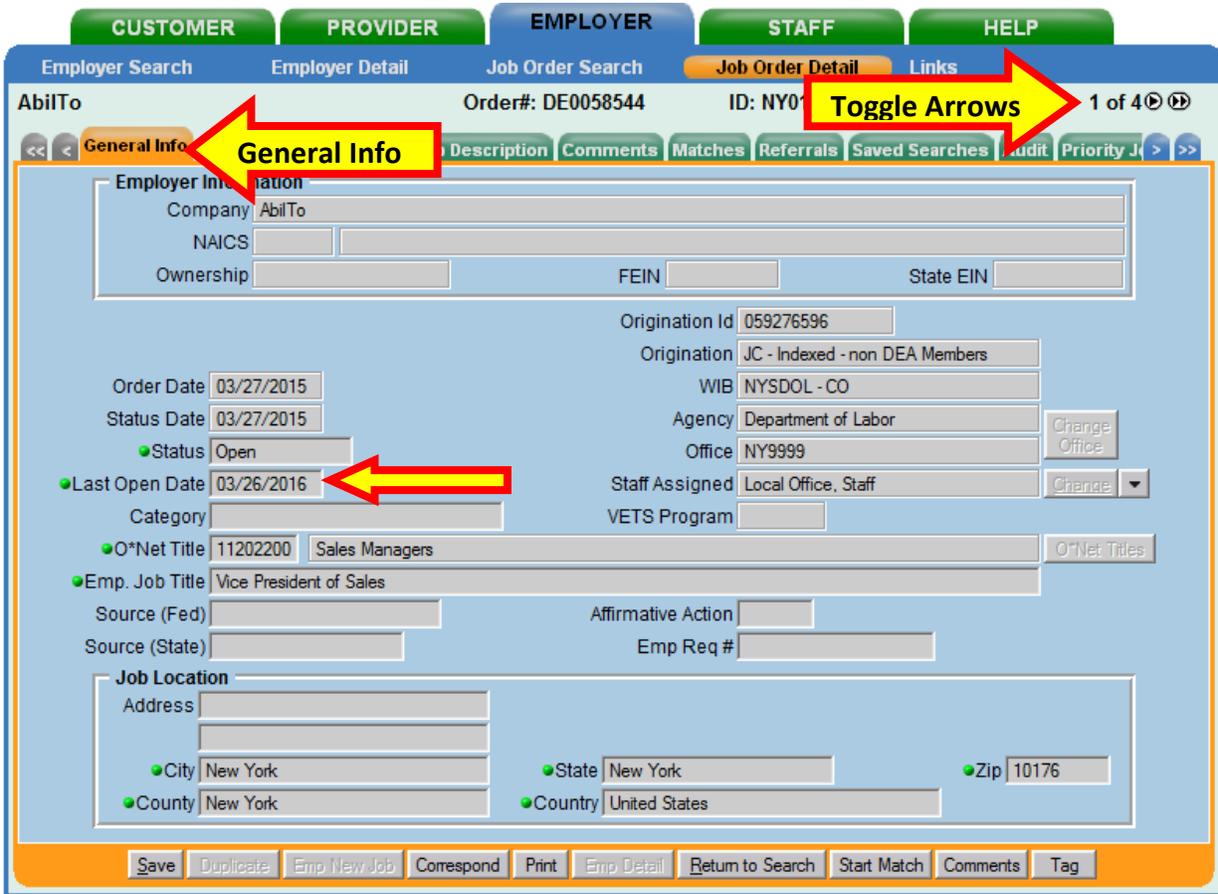
REVIEWING THE JOB ORDERS

Review the Job Orders before beginning a match. Review the information in all of the tabs in the Job Order Detail window.

If multiple results are selected, toggle through the job orders using the arrows on the upper right.

On the **General Info tab** check the Order Date field to see how long the job order has been open. If the date listed in this field is old, research the job order to see if the position is still available. If the Job Order is current you can match to it.

The **Last Open Date** field indicates how long the Job Order will remain open.



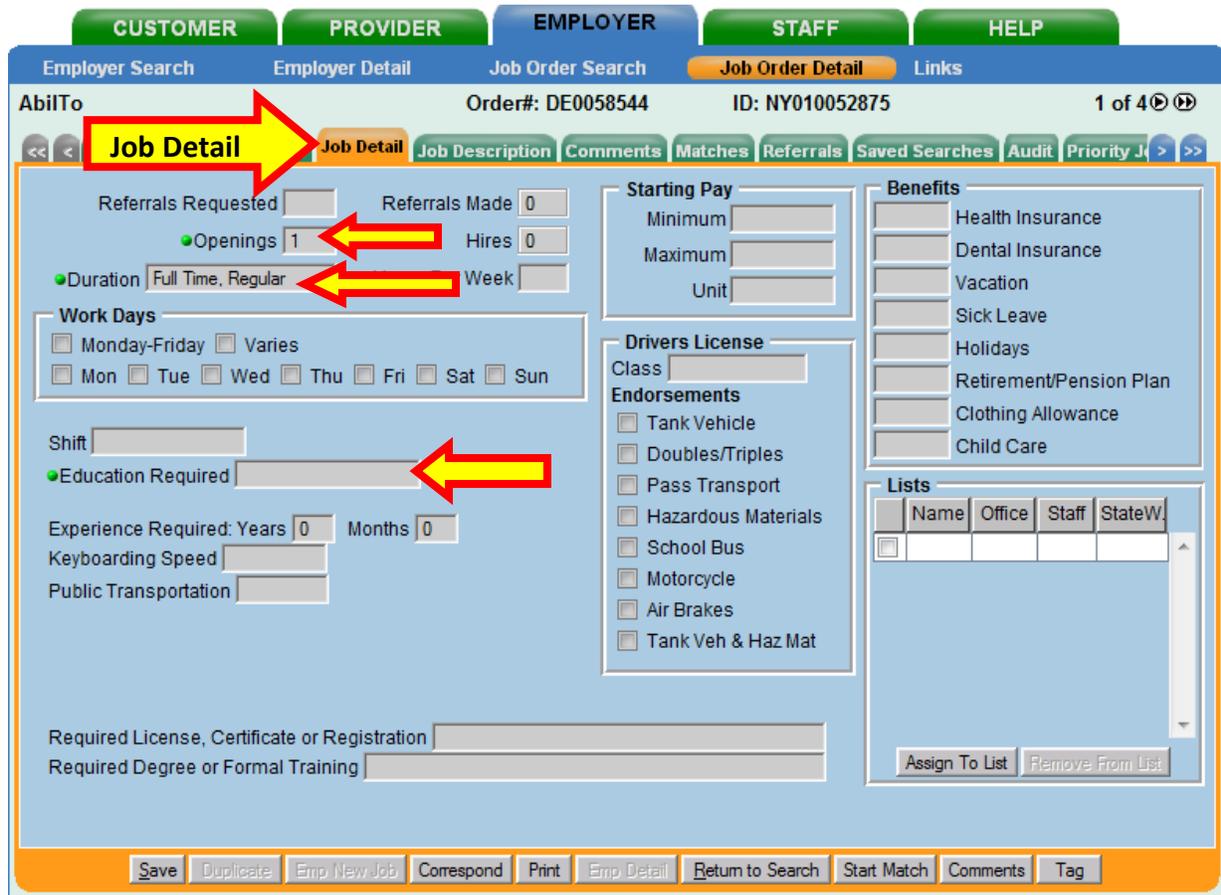
The screenshot displays the 'Job Order Detail' window for 'AbilTo'. The interface includes a top navigation bar with tabs for 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. Below this, there are sub-tabs for 'Employer Search', 'Employer Detail', 'Job Order Search', 'Job Order Detail', and 'Links'. The main content area is divided into several sections:

- Employer Information:** Fields for Company (AbilTo), NAICS, Ownership, FEIN, and State EIN.
- Order Details:** Order# (DE0058544), ID (NY0), and Origination Id (059276596).
- Order Dates:** Order Date (03/27/2015) and Status Date (03/27/2015).
- Status:** Open.
- Last Open Date:** 03/26/2016 (highlighted with a red arrow).
- Agency:** Department of Labor, Office NY9999.
- Staff Assigned:** Local Office, Staff.
- Job Location:** City (New York), State (New York), Zip (10176), and Country (United States).

At the bottom of the window, there is a row of action buttons: Save, Duplicate, Emp New Job, Correspond, Print, Emp Detail, Return to Search, Start Match, Comments, and Tag.

JOB DETAIL TAB

The Job Detail tab provides information regarding specific details including, the number of Job Openings, Duration, and Education.



The screenshot shows the 'Job Detail' tab in the OSOS application. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with options like Employer Search, Employer Detail, Job Order Search, Job Order Detail (selected), and Links. The main content area displays job details for Order# DE0058544 and ID: NY010052875. A yellow arrow points to the 'Job Detail' tab in the sub-navigation bar. Other red arrows point to the 'Openings' field (value 1), the 'Duration' dropdown (set to 'Full Time, Regular'), and the 'Education Required' field. The form contains various input fields and checkboxes for Referrals, Starting Pay, Benefits, Drivers License, and Endorsements. A 'Lists' table is also visible at the bottom right.

	Name	Office	Staff	StateW.
<input type="checkbox"/>				

JOB DESCRIPTION TAB

The Job Description tab contains the specifics of the job. Compare the description to the customer talent bank. This tab should be used to compare the job order requirements to the customer’s skills, work history and qualifications.



The screenshot shows the OSOS interface with the following elements:

- Navigation Bar:** CUSTOMER, PROVIDER, EMPLOYER (selected), STAFF, HELP
- Sub-Menu:** Employer Search, Employer Detail, Job Order Search, Job Order Detail (selected), Links
- Page Info:** AbilTo, Order#: DE0058544, ID: NY010052875, 1 of 4
- Tab Navigation:** Job Description (highlighted with a red arrow), Comments, Matches, Referrals, Saved Searches, Audit, Priority J
- Main Content:**

•Enter a Job Description:

AbilTo is a venture capital-backed, high growth company in the technology-enabled healthcare field, and as such, there is potential for accelerated meritocratic individual growth, based on results. We are seeking a talented and experienced professional to lead the new sales effort, focusing on the BCBS plans, select employer groups and select national health plans. This position is focused on growing our business and adding new health plans to the portfolio of customers. The responsibilities include:

 1. Management of the sales cycle from initial conversation to close, working collaboratively with the AbilTo leadership team
 2. Expansion of current client relationships in partnership with the account management team
 3. Negotiation of renewals and other commercial agreements
 4. Development and management of the sales team including recruiting
 5. Sales reporting in partnership with the CFO including revenue reconciliation
 6. Effective management of customer on-boarding in partnership with the operations team and account management

1. Bachelor degree from an accredited institution in a related field. Masters level degree a desired plus. 2. Minimum seven years of account management experience in the healthcare industry, with proven knowledge of the business models and organization of health plans, payers and providers. 3. Proven record of sales goals attainment 4. Must be able to develop meaningful relationships, using them to further AbilTo's objectives. 5. Must be able to work in a high performance team environment, including coordinating different areas of both client and AbilTo. 6. Willingness to travel - approximately 40%. In addition to the technical requirements for this specific position, AbilTo seeks candidates who demonstrate:

 1. Personal ownership of assignments and responsibilities
 2. Ability to plan, execute, check results and improve on a continuing basis
 3. Resilience and grit to ensure mission completion even in the face of adversity
 4. Discipline and organization to manage multiple tasks
- Buttons:** Spell Check
- Bottom Bar:** Save, Duplicate, Emp New Job, Correspond, Print, Emp Detail, Return to Search, Start Match, Comments, Tag



MATCH TAB

Look in the match tab. If matching has been completed by another staff member the results will be displayed in the tab. If matches were completed by another staff member your match results may be low.

Look at a few customer records to determine if matching can be expanded, for example by geographic region. If staff previously looked at one specific geographical location expand the search by looking in different geographic locations.

If there are enough matches on the job order, move on to the next job order.

If matching was not completed by another staff person or if additional matching is necessary click on the **Start Match Button**.

The screenshot shows the OSOS interface for a Job Order Detail page. The 'EMPLOYER' tab is selected, and the 'Matches' sub-tab is active. A yellow arrow points to the 'Matches' tab. The table below lists the matches:

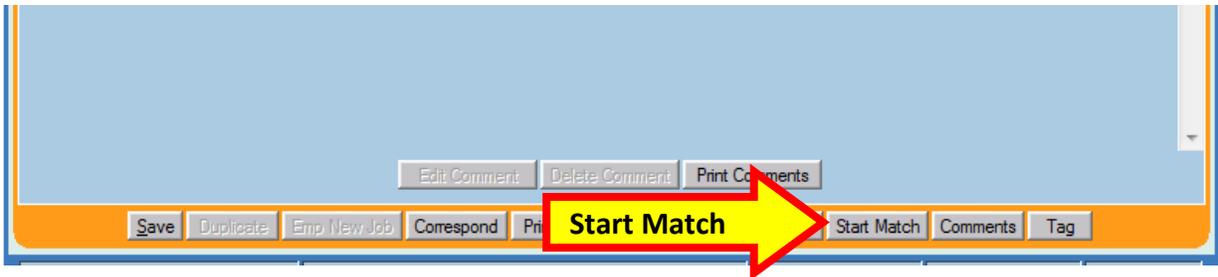
Match	Staff	OSOS ID	Job Seeker	Vet
<input type="checkbox"/>	05/18/2015 MAZIKOWSKI, KAREN	NY011493904	GALLAHER, JOHN	No
<input type="checkbox"/>	05/18/2015 MAZIKOWSKI, KAREN	NY007366049	SEARS, DANALLE	No
<input type="checkbox"/>	05/22/2015 VACCA, WILMA	NY014273241	WILLIAMS, BEVERLY	No
<input type="checkbox"/>	05/18/2015 MAZIKOWSKI, KAREN	NY006633310	KEMP, ELYSE	No
<input type="checkbox"/>	05/18/2015 MAZIKOWSKI, KAREN	NY007927062	KOZIEL, STEPHANIE	No
<input type="checkbox"/>	05/18/2015 MAZIKOWSKI, KAREN	NY001984163	Livingston, Teresa	No
<input type="checkbox"/>	05/18/2015 MAZIKOWSKI, KAREN	NY011093881	LEMARD, MITCHON	No
<input type="checkbox"/>	05/18/2015 MAZIKOWSKI, KAREN	NY009472778	CLAPSATTLE, ASHLEY	No

At the bottom of the page, there are buttons for 'Referral', 'IVR', and 'Cost Detail'. The bottom navigation bar includes buttons for 'Save', 'Duplicate', 'Emp New Job', 'Correspond', 'Print', 'Emp Detail', 'Return to Search', 'Start Match', 'Comments', and 'Tag'.

START MATCH

To search for customers whose skills & work history match the job order, Click on the **Start Match button** to start the job matching process. This will bring up the Customer Search Window.

*The Start Match button is available on all of the **Job Order Detail** Window tabs.*

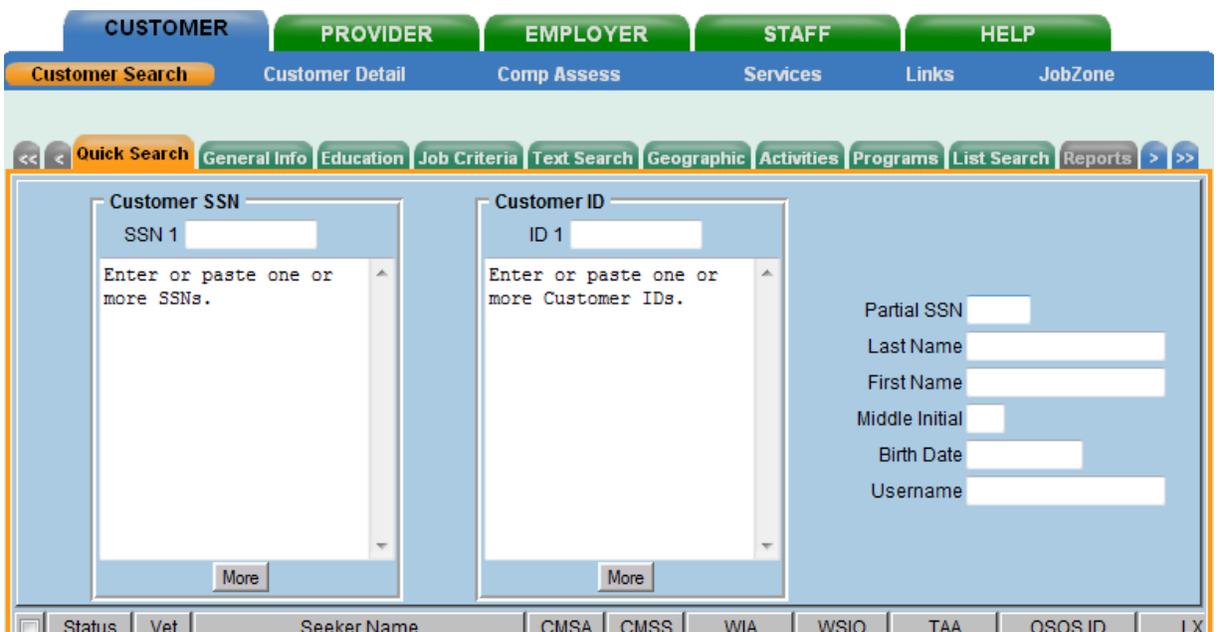


CUSTOMER SEARCH - QUICK SEARCH TAB

When the Start Match Button is selected the Match Mode or Matching process begins.

Refine the search in order to locate local customers that meet the job order requirements.

The Quick Search Screen is only used to search for a specific customer. Use the customer's SSN, NYID etc. to search for the specific customer.



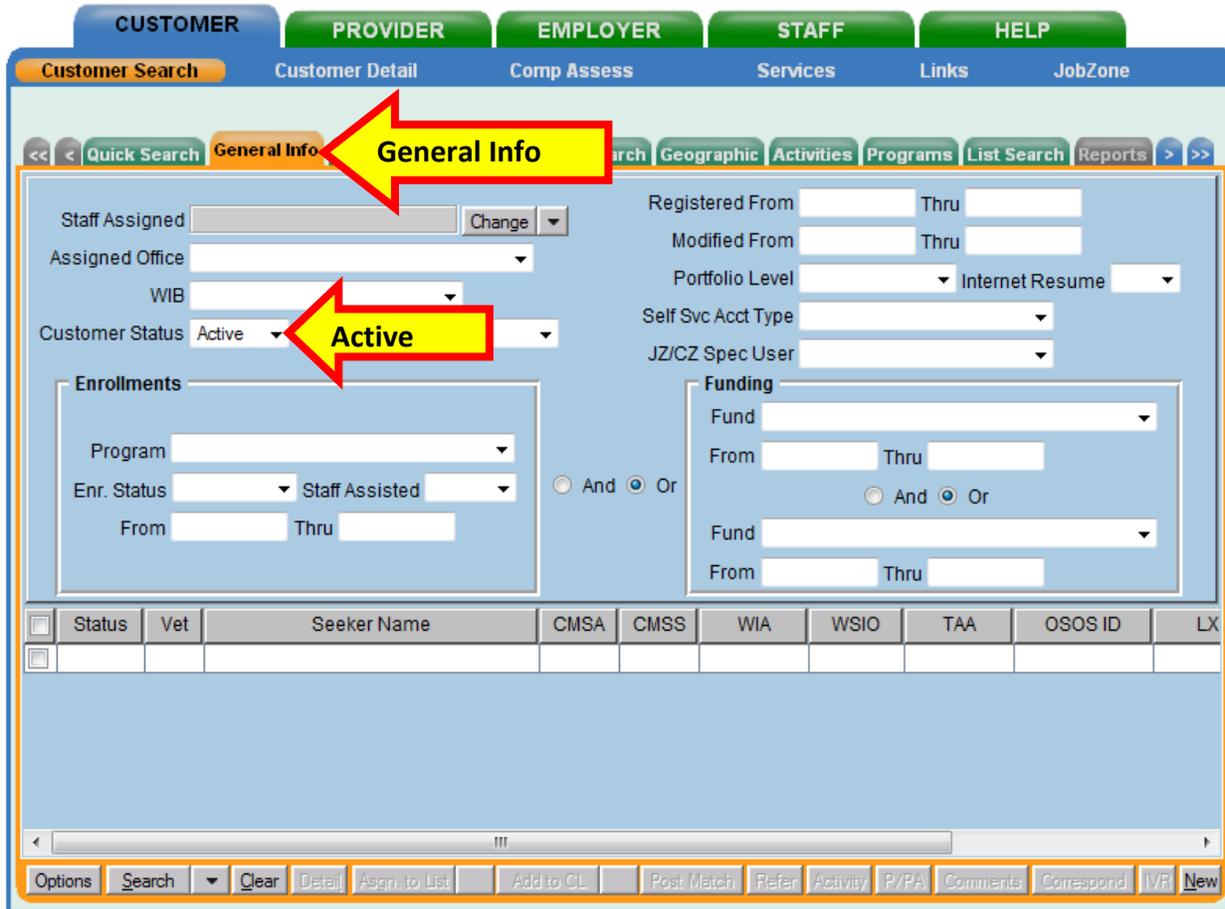
The screenshot shows the 'Quick Search' tab selected in the 'Customer Search' section. The interface includes several input fields and buttons:

- Customer SSN:** A text box labeled 'SSN 1' with a 'More' button below it. Below the text box is a large text area containing the instruction: 'Enter or paste one or more SSNs.'
- Customer ID:** A text box labeled 'ID 1' with a 'More' button below it. Below the text box is a large text area containing the instruction: 'Enter or paste one or more Customer IDs.'
- Search Criteria:** A series of input fields on the right side: 'Partial SSN', 'Last Name', 'First Name', 'Middle Initial', 'Birth Date', and 'Username'.
- Navigation:** A top navigation bar with tabs for 'CUSTOMER', 'PROVIDER', 'EMPLOYER', 'STAFF', and 'HELP'. Below it, a secondary navigation bar includes 'Customer Search', 'Customer Detail', 'Comp Assess', 'Services', 'Links', and 'JobZone'. At the bottom, a third navigation bar includes 'Quick Search', 'General Info', 'Education', 'Job Criteria', 'Text Search', 'Geographic', 'Activities', 'Programs', 'List Search', and 'Reports'.
- Footer:** A row of checkboxes and labels: 'Status', 'Vet', 'Seeker Name', 'CMSA', 'CMSS', 'WIA', 'WSIO', 'TAA', 'OSOS ID', and 'LX'.

CUSTOMER SEARCH - GENERAL INFO TAB

In the **General Info** tab input the desired search criteria. Make the Customer Status **Active**.

Other fields may be used to narrow the search if results are too high.

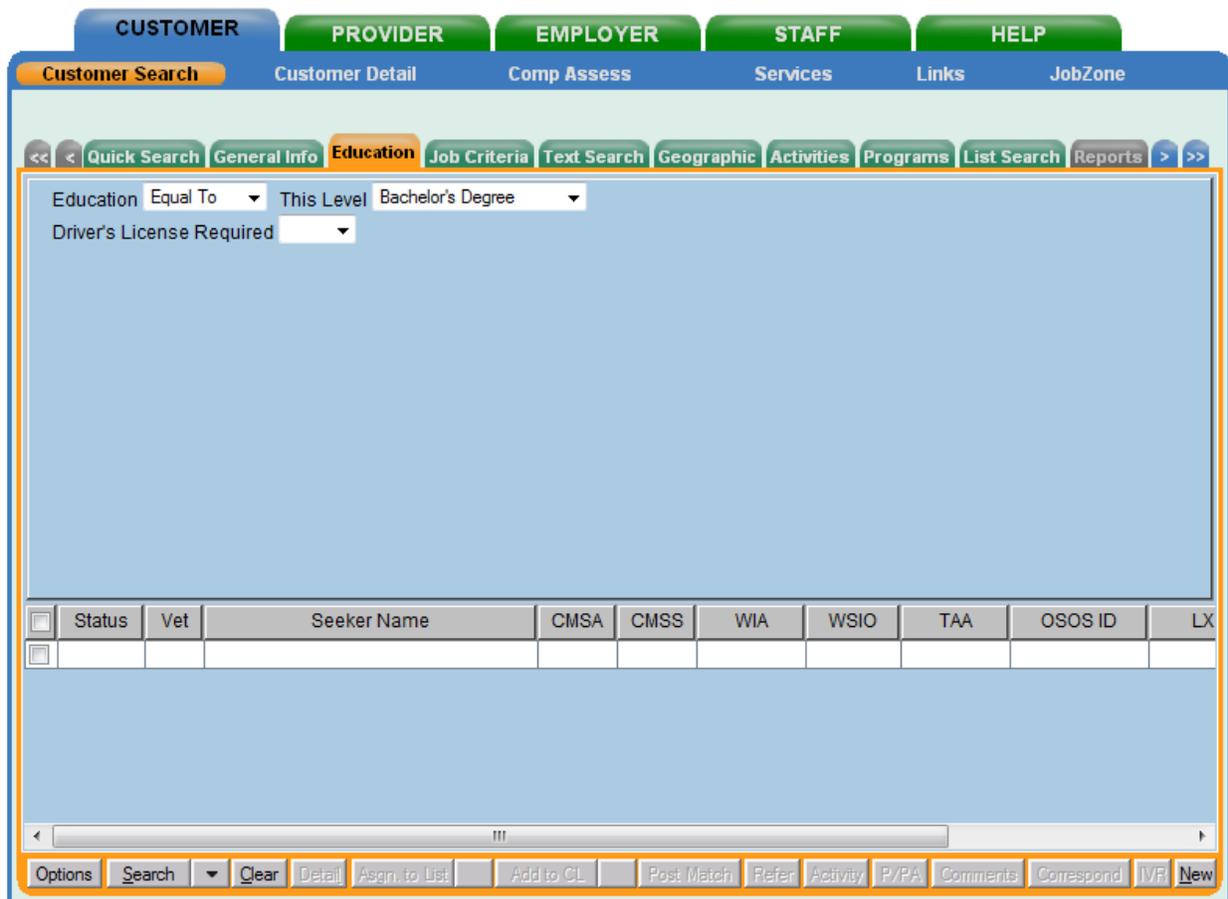


The screenshot displays the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The 'General Info' tab is selected and highlighted with a red arrow. The search criteria section includes fields for Staff Assigned, Assigned Office, WIB, Customer Status (set to Active), Registered From, Modified From, Portfolio Level, Internet Resume, Self Svc Acct Type, and JZ/CZ Spec User. There are also sections for Enrollments and Funding. Below the search criteria is a table with columns: Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, and LX. The table is currently empty. At the bottom, there is a toolbar with buttons for Options, Search, Clear, Detail, Assign to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

CUSTOMER SEARCH - EDUCATION TAB

When the Education level is entered in the Job Detail tab of the Job Order, the Education tab fills in automatically from the job order.

If a "JC" order does not have education information entered, but it is in the job description, enter the education information here. If the Education level required by the business is "Less than High School" the field should be made blank. Any other entry should be left in.



Education Equal To This Level Driver's License Required

<input type="checkbox"/>	Status	Vet	Seeker Name	CMSA	CMSS	WIA	WSIO	TAA	OSOS ID	LX
<input type="checkbox"/>										

Options Search Clear Detail Assign to List Add to CL Post Match Refer Activity P/PA Comments Correspond IVR New

CUSTOMER SEARCH-JOB CRITERA TAB

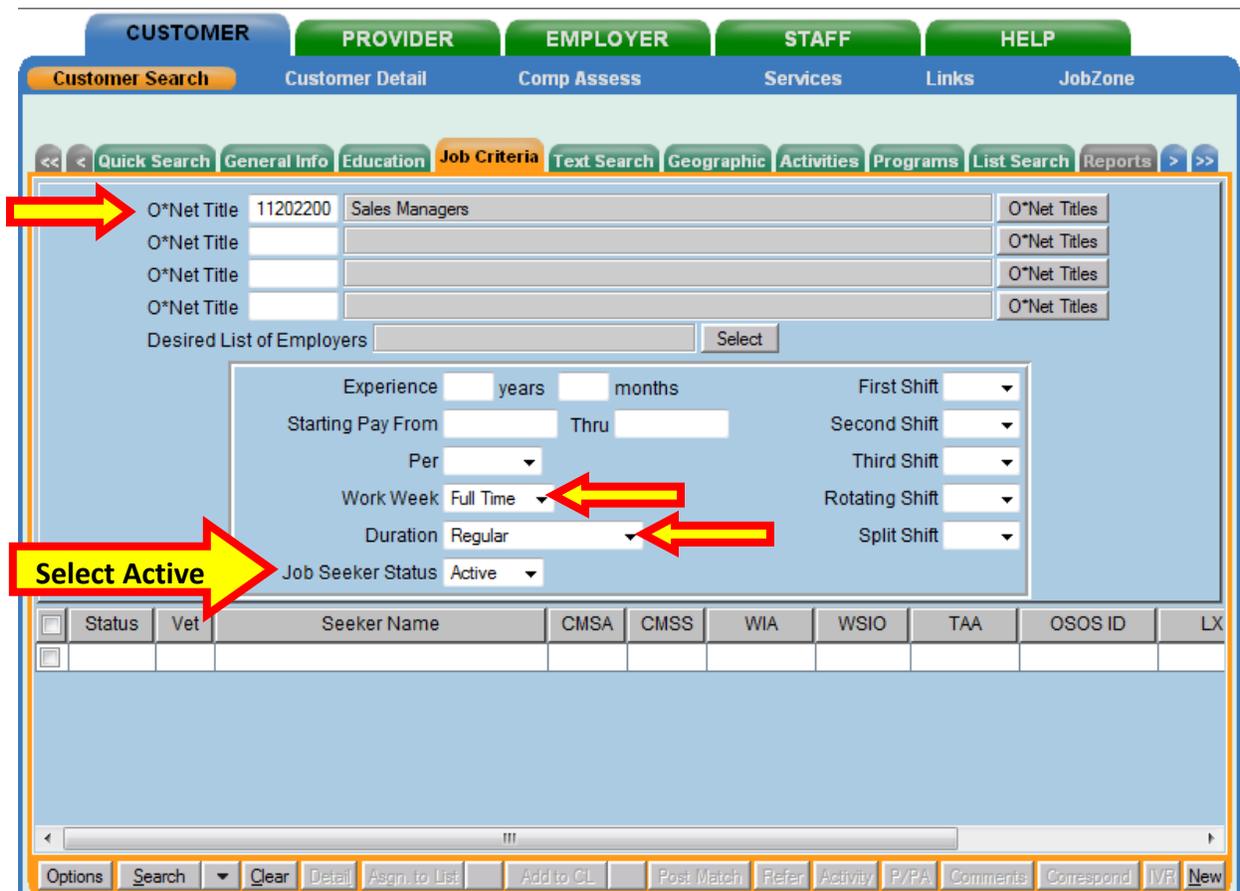
The O*Net Title and Code, Work Week and Duration fields fill in automatically. Select **Active** in the Job Seeker Status drop down field.



*Job Seeker Status should always be **Active** to insure that customers who are inactive (back to work) do not receive any unwanted job matches.*

Note: The four O'Net title search function will only provide results that include ALL titles searched. This function is currently being worked on to have ANY of the titles searched be displayed. This feature should be working in the next version of OSOS.

To pull the largest number of matches, remember that less is more.



The screenshot displays the 'Job Criteria' tab in the OSOS Customer Search interface. Key elements include:

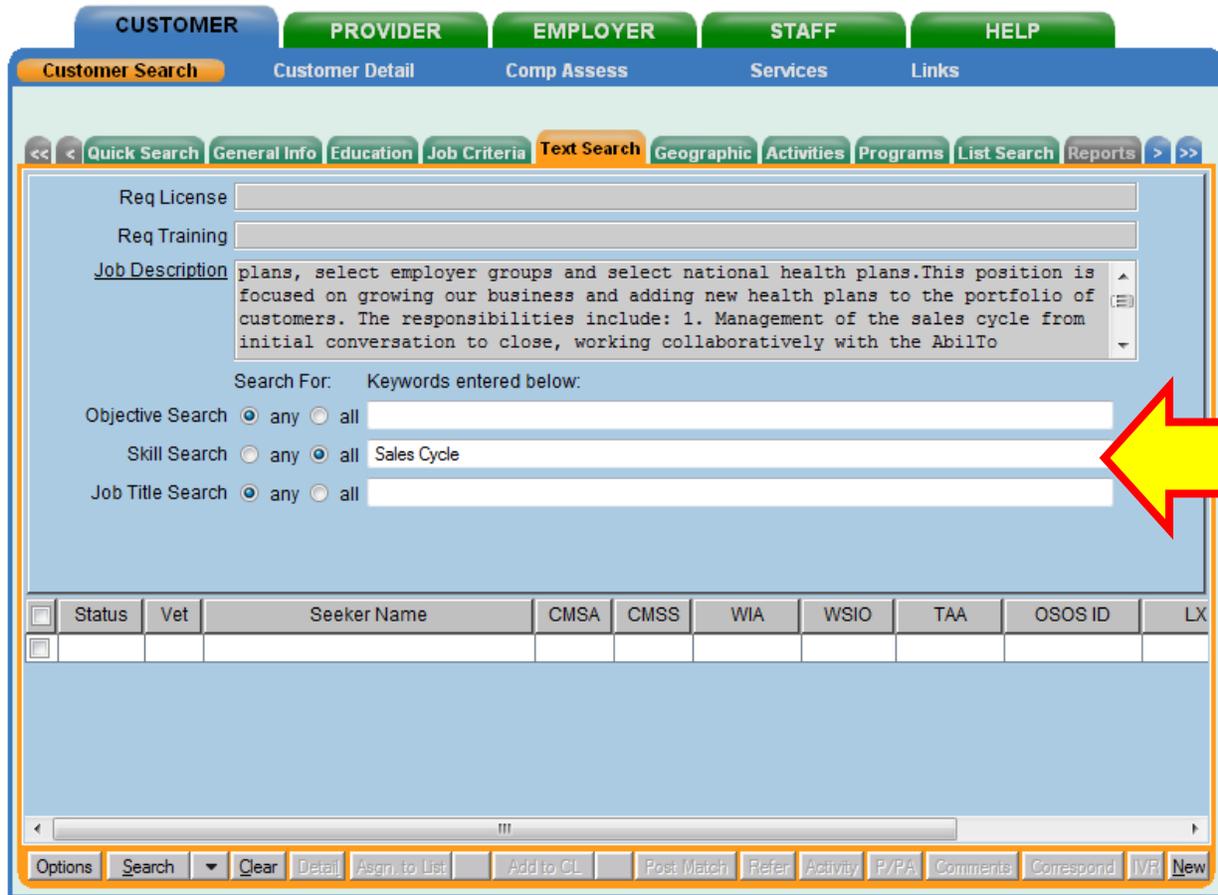
- O*Net Title:** A list of search criteria with the first entry being '11202200 Sales Managers'. A yellow arrow points to this entry.
- Job Seeker Status:** A dropdown menu set to 'Active'. A yellow arrow points to this dropdown, and a yellow box labeled 'Select Active' with an arrow points to the 'Active' option.
- Work Week:** A dropdown menu set to 'Full Time'. A yellow arrow points to this dropdown.
- Duration:** A dropdown menu set to 'Regular'. A yellow arrow points to this dropdown.
- Experience:** Fields for years and months.
- Starting Pay:** Fields for 'Starting Pay From' and 'Thru'.
- Per:** A dropdown menu.
- Shifts:** Dropdown menus for First Shift, Second Shift, Third Shift, Rotating Shift, and Split Shift.
- Table:** A table with columns: Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, LX.
- Buttons:** A row of buttons at the bottom including Options, Search, Clear, Detail, Assign to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, I/F, and New.

CUSTOMER SEARCH - TEXT SEARCH TAB

In this section, customize the **Objective Search**, **Skill Search** and/or **Job Title Search** fields.

These fields are optional and should be used to filter your search results.

Use Keywords from the Job Description to fill in these search options.



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, and Links. The main content area has a search filter section with the following fields:

- Req License: [Text Input]
- Req Training: [Text Input]
- Job Description: [Text Area containing job description text]
- Search For: Keywords entered below:
- Objective Search: any all [Text Input]
- Skill Search: any all Sales Cycle [Text Input]
- Job Title Search: any all [Text Input]

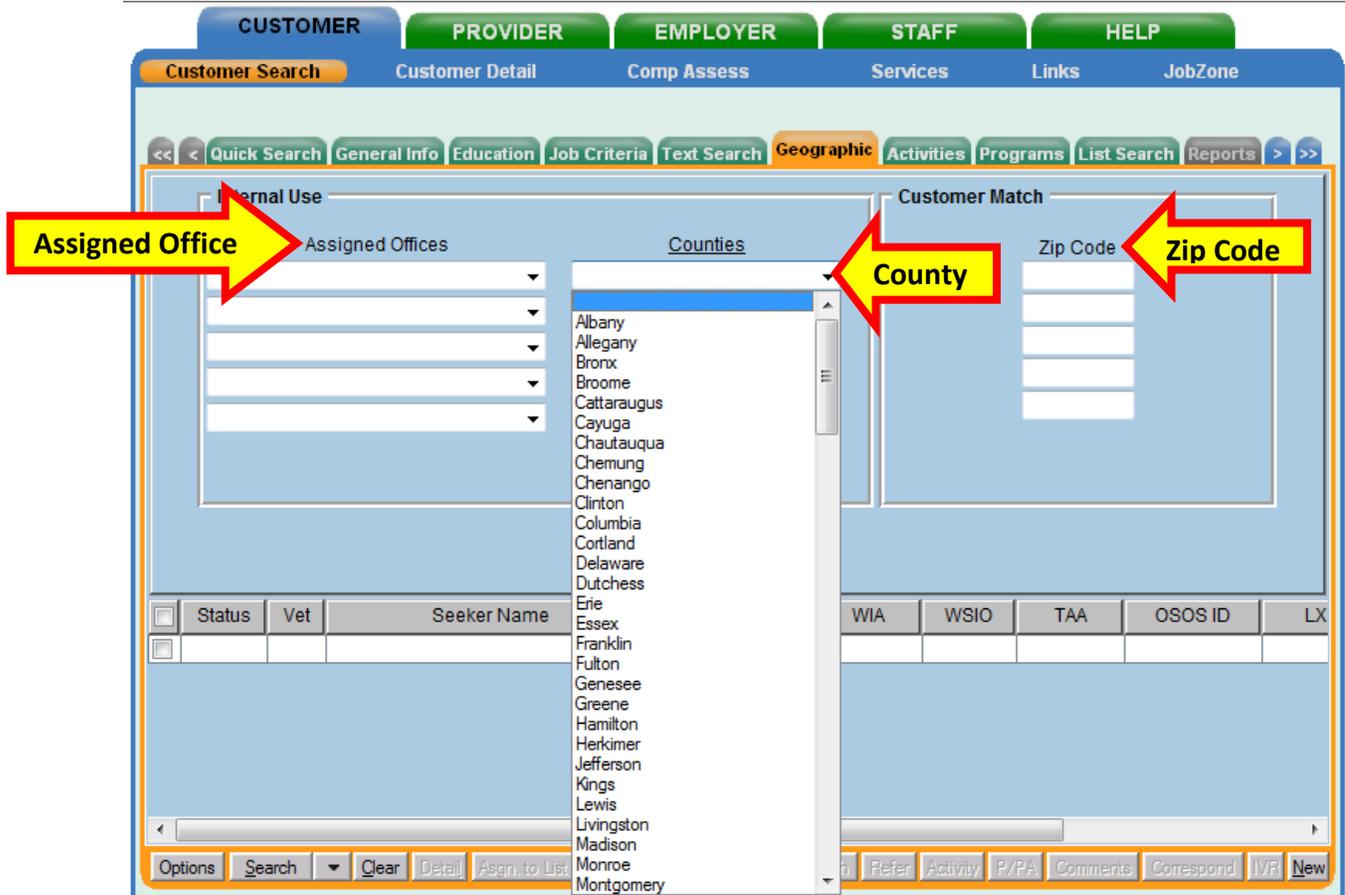
A yellow arrow points to the Skill Search field. Below the search filter is a table with columns: Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, LX. The table is currently empty. At the bottom, there is a toolbar with buttons: Options, Search, Clear, Detail, Asgn. to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, New.

CUSTOMER SEARCH - GEOGRAPHIC TAB

If a WIB was not entered in the General Info tab, a county should be added. Assigned Offices may be used if the goal is to find a job seeker registered with that office.

When matching is for recruitment, then matching by county is best (depending upon location).

Searching by Zip Code is most effective when seeking results for a specific geographic target.



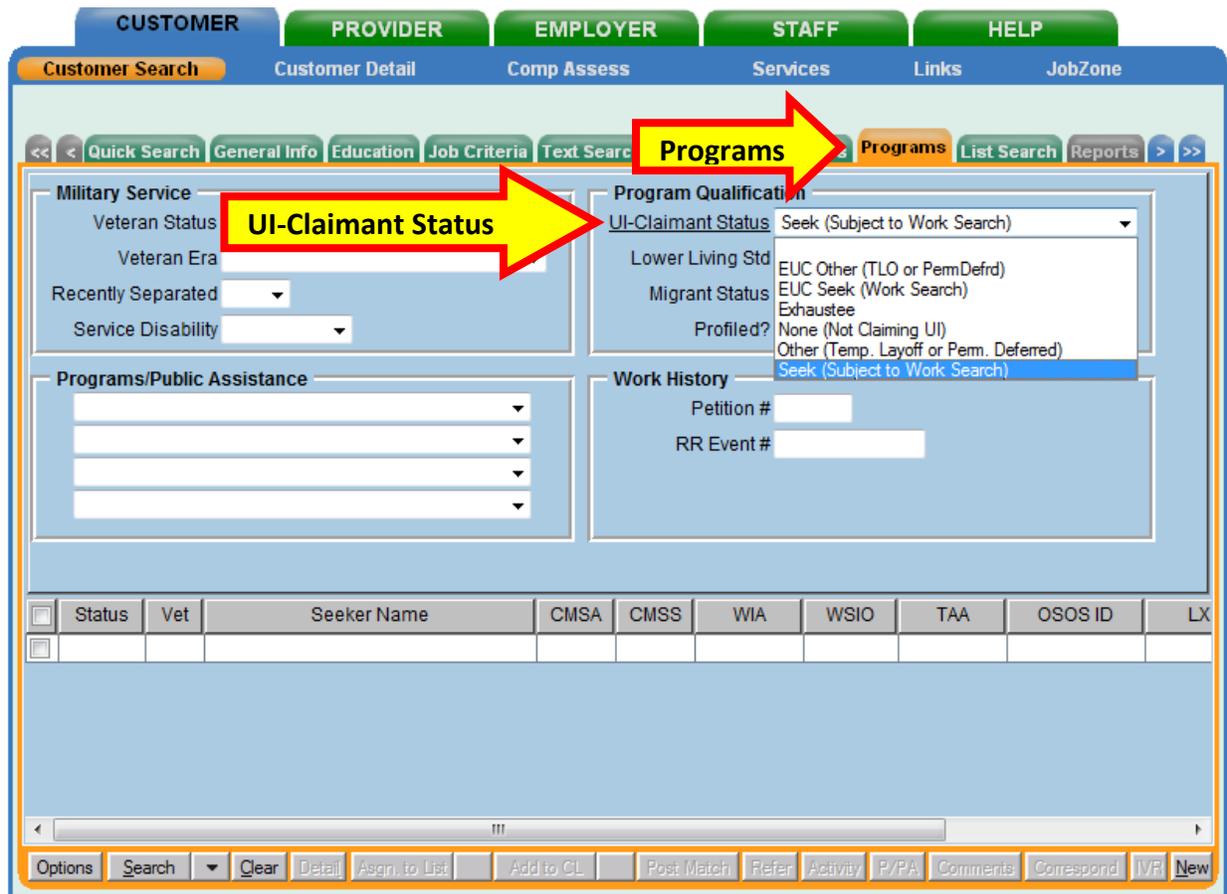
The screenshot shows the OSOS Customer Search interface with the 'Geographic' tab selected. The interface includes a top navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The main content area is divided into two sections: 'Internal Use' and 'Customer Match'. The 'Internal Use' section has an 'Assigned Offices' dropdown menu, which is highlighted by a yellow arrow labeled 'Assigned Office'. The 'Customer Match' section has a 'Counties' dropdown menu, highlighted by a yellow arrow labeled 'County', and a 'Zip Code' input field, highlighted by a yellow arrow labeled 'Zip Code'. The 'Counties' list includes Albany, Allegany, Bronx, Broome, Cattaraugus, Cayuga, Chautauqua, Chemung, Chenango, Clinton, Columbia, Cortland, Delaware, Dutchess, Erie, Essex, Franklin, Fulton, Genesee, Greene, Hamilton, Herkimer, Jefferson, Kings, Lewis, Livingston, Madison, Monroe, and Montgomery. The 'Customer Match' section also includes a table with columns for WIA, WSIO, TAA, OSOS ID, and LX. At the bottom of the interface, there are buttons for Options, Search, Clear, Detail, and Assign to List, along with a row of buttons for Refer, Activity, P/PA, Comments, Correspond, IVF, and New.

CUSTOMER SEARCH – PROGRAMS TAB

In the Programs tab under Program Qualifications make the UI-Claimant Status “**Seek**” (Subject to Work Search) if the desired result is for **UI Customers only**. If the desired result is for both UI and Non-UI customers leave this field blank.



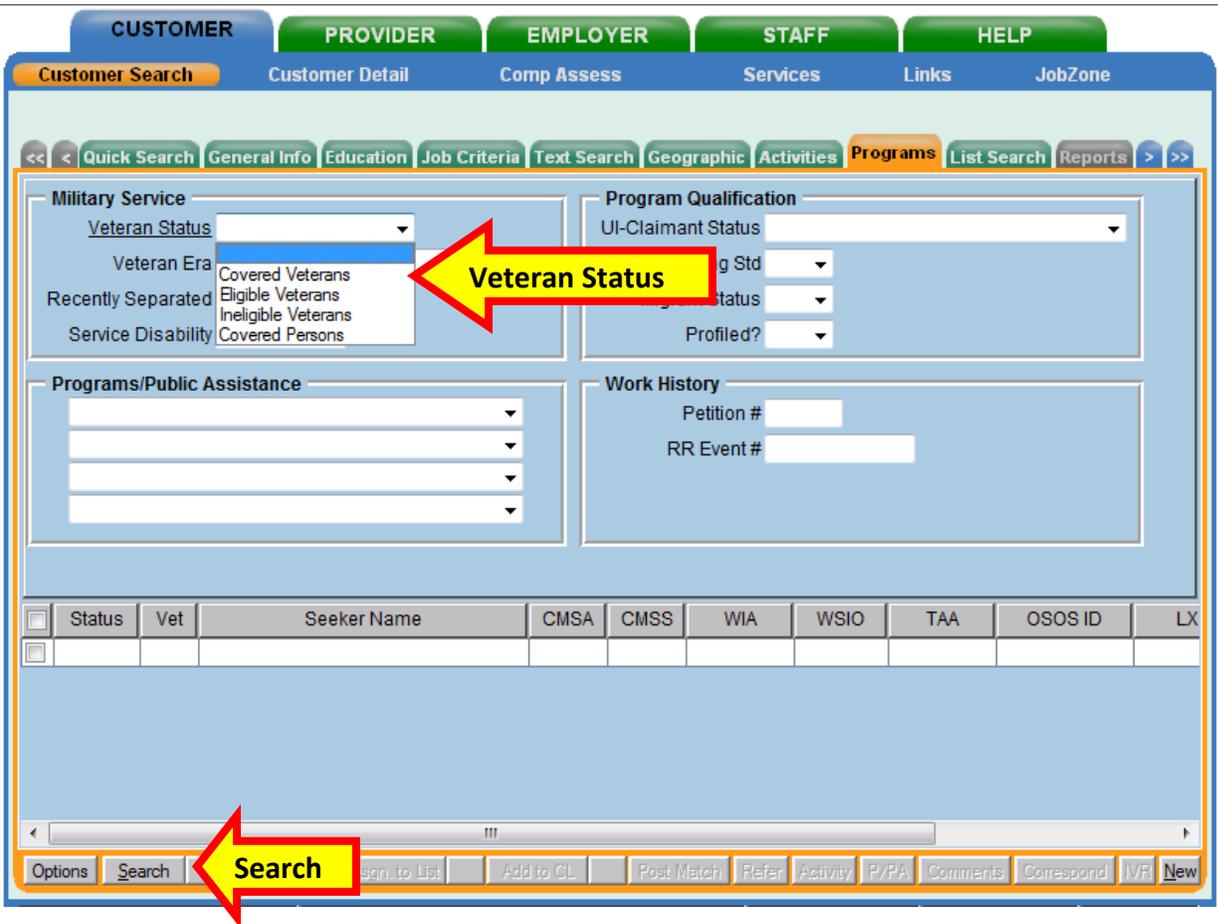
Note: This field can be edited and/or left blank depending on the population you wish to reach.



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, Links, and JobZone. The main interface has a navigation bar with Quick Search, General Info, Education, Job Criteria, Text Search, Programs, List Search, and Reports. The Programs tab is selected, and a red arrow points to it. The UI-Claimant Status dropdown is highlighted with a red arrow pointing to 'Seek (Subject to Work Search)'. The Programs dropdown is also highlighted with a red arrow. Below the dropdowns is a table with columns: Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, and LX. At the bottom, there are buttons for Options, Search, Clear, Detail, Assign to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, and New.

In the Military Service section select a Veteran Status to bring up Veteran customers. Selecting Covered Veterans, Eligible Veterans, or Covered Persons will result in these customers being displayed in the results panel.

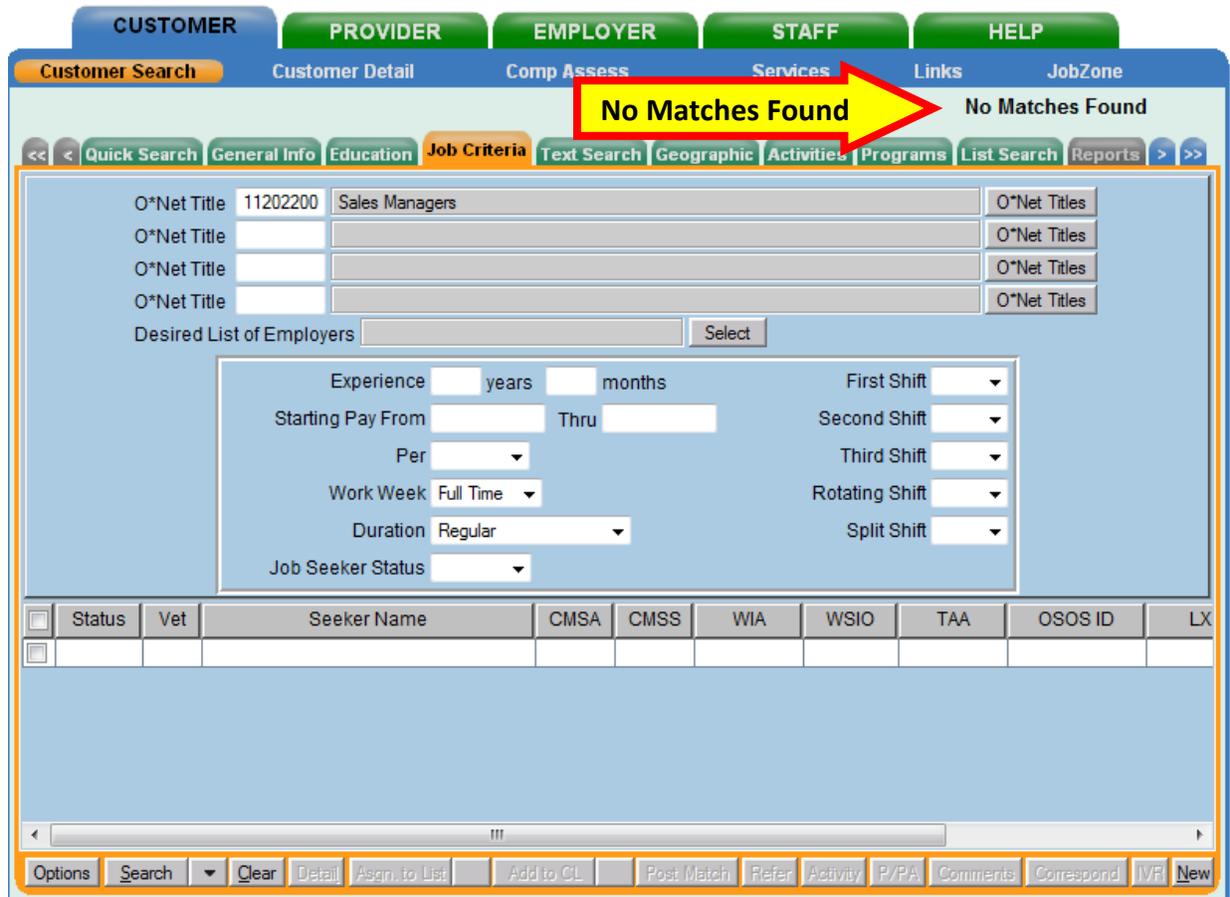
If a Veteran Status is not selected the Veteran status will still be indicated in your search results with a “Yes” in the column labeled Vet.



After entering all search criteria click on Search.

CUSTOMER SEARCH RESULTS: NO MATCHES

If a search results in **“No Matches”** the search criteria can be changed.



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. A yellow arrow points to a red box containing the text "No Matches Found".

The search criteria section includes:

- O*Net Title: 11202200 Sales Managers
- O*Net Title: [Empty]
- O*Net Title: [Empty]
- O*Net Title: [Empty]
- Desired List of Employers: [Empty] Select
- Experience: [Empty] years [Empty] months
- Starting Pay From: [Empty] Thru [Empty]
- Per: [Empty]
- Work Week: Full Time
- Duration: Regular
- Job Seeker Status: [Empty]
- First Shift: [Dropdown]
- Second Shift: [Dropdown]
- Third Shift: [Dropdown]
- Rotating Shift: [Dropdown]
- Split Shift: [Dropdown]

Below the search criteria is a table with the following columns: Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, LX. The table is currently empty.

At the bottom, there is a toolbar with buttons: Options, Search, Clear, Detail, Asgn. to List, Add to CL, Post Match, Refer, Activity, P/PA, Comments, Correspond, IVR, New.

REMOVING THE O*NET TITLE

If no matches are found when you search there are several options.

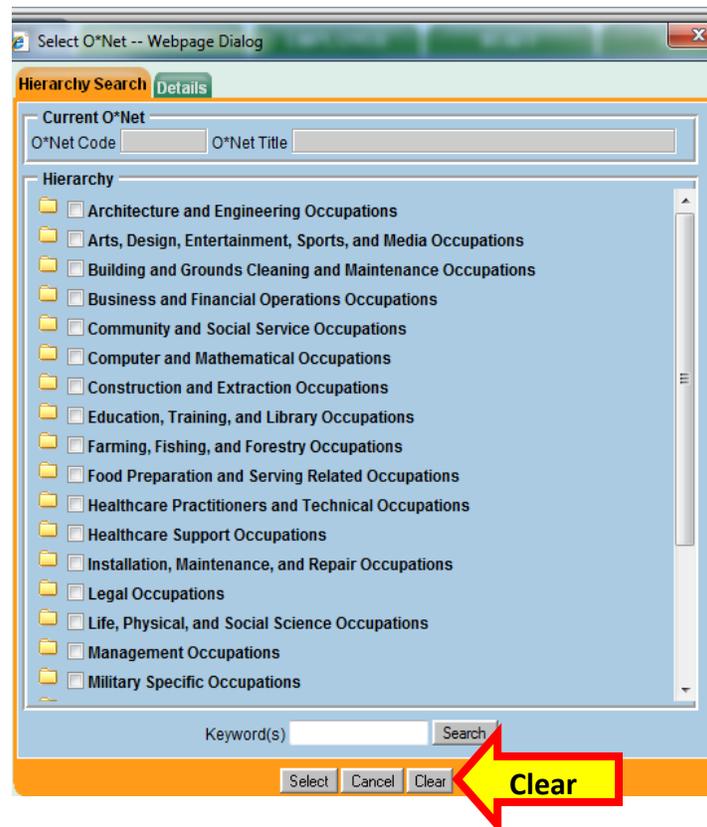
One option is to remove the O*Net Title.

To remove the O*Net title go to the **Job Criteria tab**, click on **O*Net titles**. The O*Net dialogue box will appear, click on **“Clear”**.



*Note: the O*Net title was cleared by bringing up the O*Net dialogue box and not by using the Clear button at the bottom of the screen*

Do not use the Clear button at the bottom of the screen



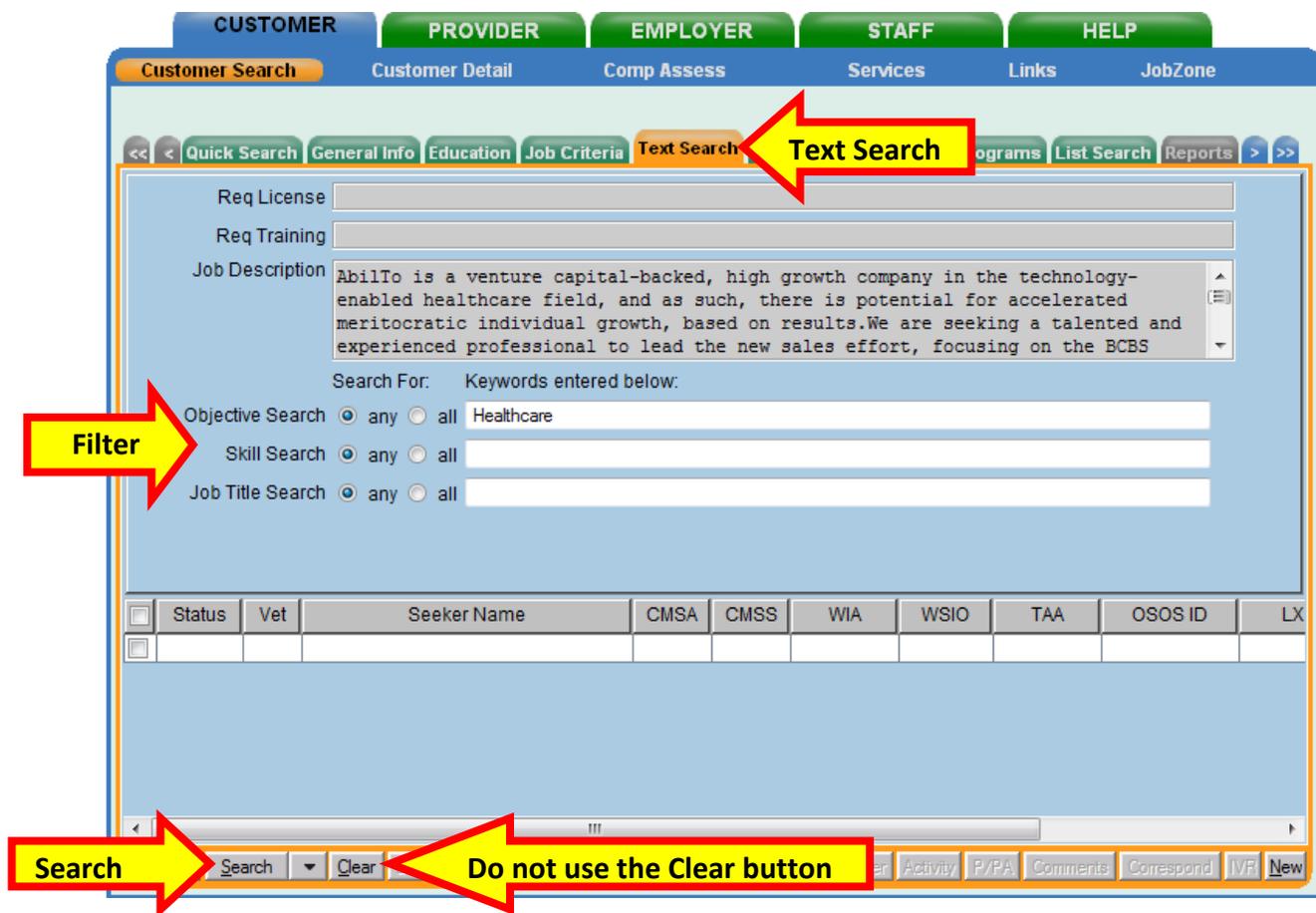
TEXT SEARCH TAB

After the O*Net title is removed, search within the Text Search tab

In the Text Search tab you can search by Objective, Skill, or Job Title.

*The job description is automatically carried into this tab. Scroll through the job description to identify **Keywords**.*

Use the search fields to filter your results. Click the **Search** button at the bottom of the screen to view the results.



The screenshot shows the OSOS interface with the 'Text Search' tab selected. A red arrow points to the 'Text Search' tab label. A yellow arrow labeled 'Filter' points to the search filters. A yellow arrow labeled 'Search' points to the search button at the bottom. A yellow arrow labeled 'Do not use the Clear button' points to the 'Clear' button at the bottom.

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

Quick Search | General Info | Education | Job Criteria | **Text Search** | Programs | List Search | Reports

Req License:

Req Training:

Job Description: AbilTo is a venture capital-backed, high growth company in the technology-enabled healthcare field, and as such, there is potential for accelerated meritocratic individual growth, based on results. We are seeking a talented and experienced professional to lead the new sales effort, focusing on the BCBS

Search For: Keywords entered below:

Objective Search any all

Skill Search any all

Job Title Search any all

<input type="checkbox"/>	Status	Vet	Seeker Name	CMSA	CMSS	WIA	WSIO	TAA	OSOS ID	LX
<input type="checkbox"/>										

Search

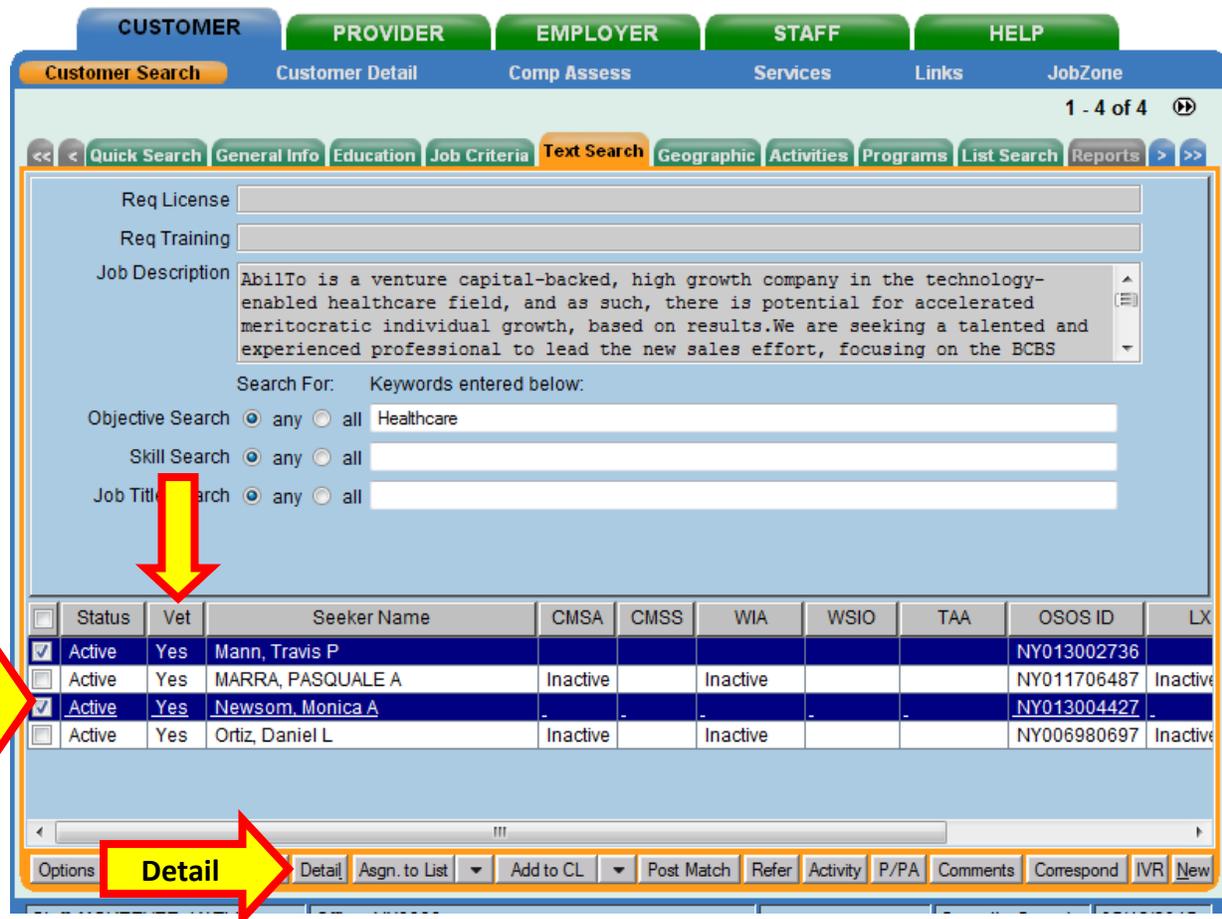
CUSTOMER SEARCH RESULTS

The potential matches will show at the bottom of the Customer Search screen.

The Vet customers matched to the job order appear in the **VET** column reading **Yes**. You can sort for Vets by clicking Vet in the title bar. These customers would have been isolated if Veteran Status was selected in the Programs tab.

Highlight the customer records to review by checking the white check box in the first column. Or highlight all the records by clicking on the check box on the grey title bar next to Status.

After selecting the customers click the **Detail Button**. This will place the highlighted customers in the **Customer Detail Window**.

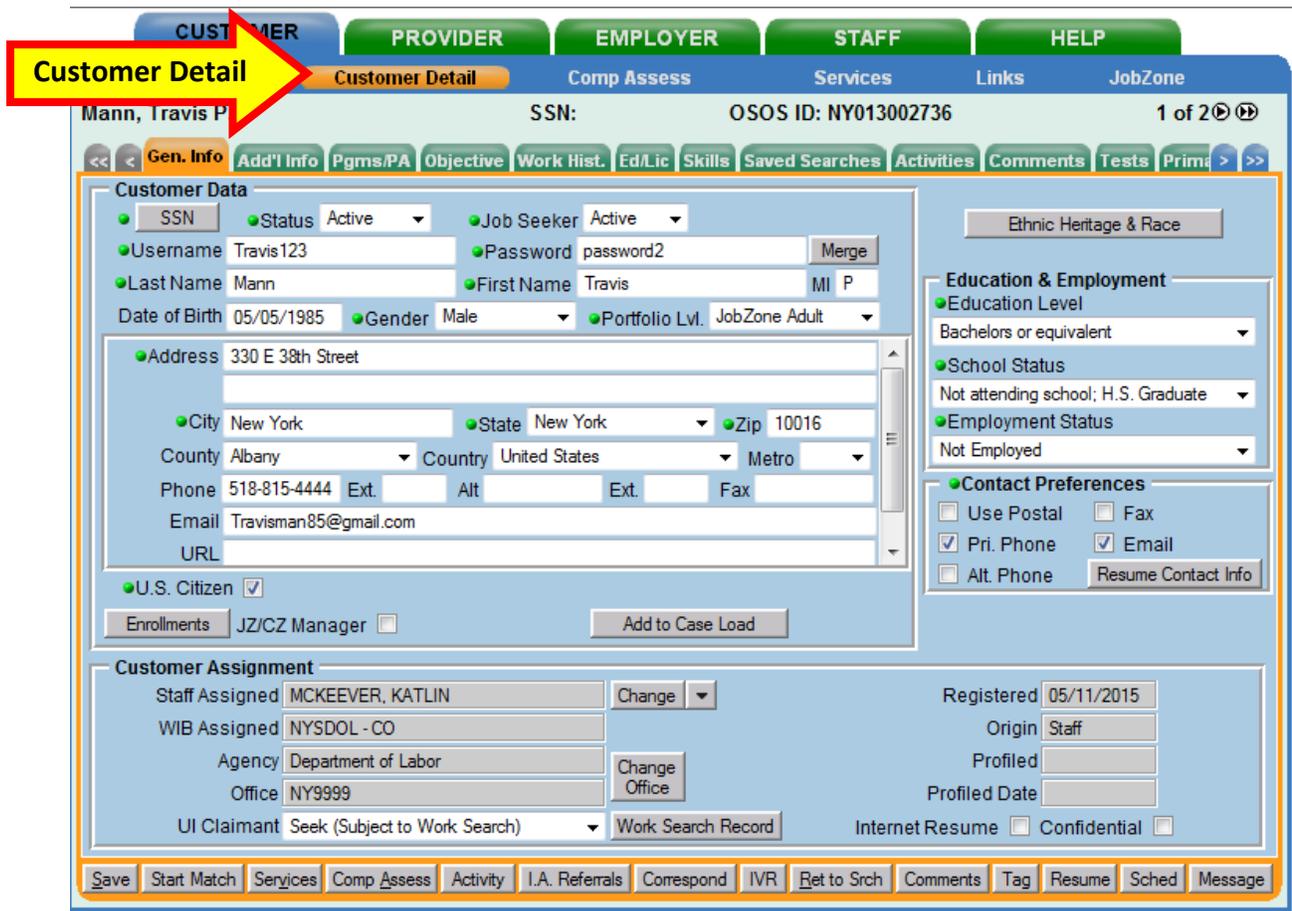


The screenshot shows the OSOS Customer Search interface. At the top, there are tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs for Customer Search, Customer Detail, Comp Assess, Services, Links, and JobZone. The main search area includes fields for Req License, Req Training, and Job Description. Below these are search filters for Objective Search, Skill Search, and Job Title Search, each with radio buttons for 'any' and 'all'. A table of search results is displayed below the filters. A yellow arrow points to the 'Vet' column in the table. At the bottom of the interface, there is a footer with various buttons, including 'Detail', which is highlighted by another yellow arrow.

Status	Vet	Seeker Name	CMSA	CMSS	WIA	WSIO	TAA	OSOS ID	LX
<input checked="" type="checkbox"/>	Active	Yes	Mann, Travis P					NY013002736	
<input type="checkbox"/>	Active	Yes	MARRA, PASQUALE A	Inactive		Inactive		NY011706487	Inactive
<input checked="" type="checkbox"/>	Active	Yes	<u>Newsom, Monica A</u>					NY013004427	
<input type="checkbox"/>	Active	Yes	Ortiz, Daniel L	Inactive		Inactive		NY006980697	Inactive

REVIEWING POSSIBLE MATCHES

Tab through the **Add'l Info**, **Objective**, **Work History**, **Ed/Lic**, **Skills** and **Comments** tabs to review the Customer's Record.



Customer Detail

Mann, Travis P SSN: OSOS ID: NY013002736 1 of 2

Gen. Info Add'l Info Pgms/PA Objective Work Hist. Ed/Lic Skills Saved Searches Activities Comments Tests Prima

Customer Data

- SSN:
- Status: Active
- Job Seeker: Active
- Username: Travis123
- Password: password2
- Last Name: Mann
- First Name: Travis
- MI: P:
- Date of Birth: 05/05/1985
- Gender: Male
- Portfolio Lvl.: JobZone Adult
- Address: 330 E 38th Street
- City: New York
- State: New York
- Zip: 10016
- County: Albany
- Country: United States
- Metro:
- Phone: 518-815-4444
- Ext.:
- Alt.:
- Ext.:
- Fax:
- Email: Travisman85@gmail.com
- URL:
- U.S. Citizen:

Enrollments: JZ/CZ Manager Add to Case Load

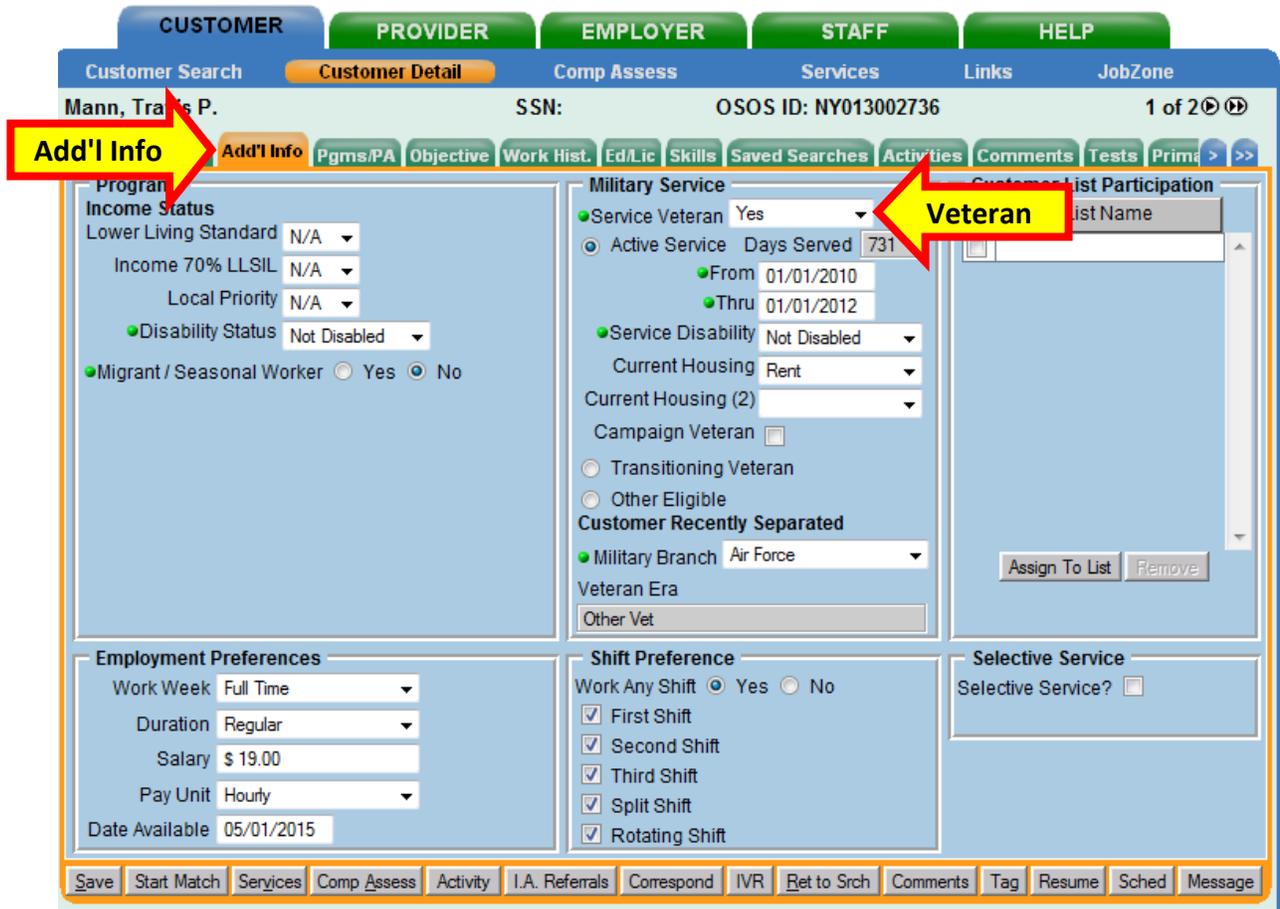
Customer Assignment

- Staff Assigned: MCKEEVER, KATLIN
- WIB Assigned: NYSDOL - CO
- Agency: Department of Labor
- Office: NY9999
- UI Claimant: Seek (Subject to Work Search)
- Registered: 05/11/2015
- 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

ADD'L INFO TAB

Review the Add'l info tab to see if the customer is a Veteran. If yes, follow your office's policy for Veteran job matching.



CUSTOMER | PROVIDER | EMPLOYER | STAFF | HELP

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

Mann, Travis P. | SSN: | OSOS ID: NY013002736 | 1 of 2

Add'l Info | Add'l Info | Pgms/PA | Objective | Work Hist. | Ed/Lic | Skills | Saved Searches | Activities | Comments | Tests | Prim: | >>

Income Status
 Lower Living Standard: N/A
 Income 70% LLSIL: N/A
 Local Priority: N/A
 Disability Status: Not Disabled
 Migrant / Seasonal Worker: Yes (No selected)

Military Service
 Service Veteran: Yes (Veteran)
 Active Service: Days Served: 731
 From: 01/01/2010
 Thru: 01/01/2012
 Service Disability: Not Disabled
 Current Housing: Rent
 Campaign Veteran:
 Transitioning Veteran:
 Other Eligible:
 Customer Recently Separated:
 Military Branch: Air Force
 Veteran Era: Other Vet

Employment Preferences
 Work Week: Full Time
 Duration: Regular
 Salary: \$ 19.00
 Pay Unit: Hourly
 Date Available: 05/01/2015

Shift Preference
 Work Any Shift: Yes (No selected)
 First Shift
 Second Shift
 Third Shift
 Split Shift
 Rotating Shift

Selective Service
 Selective Service?

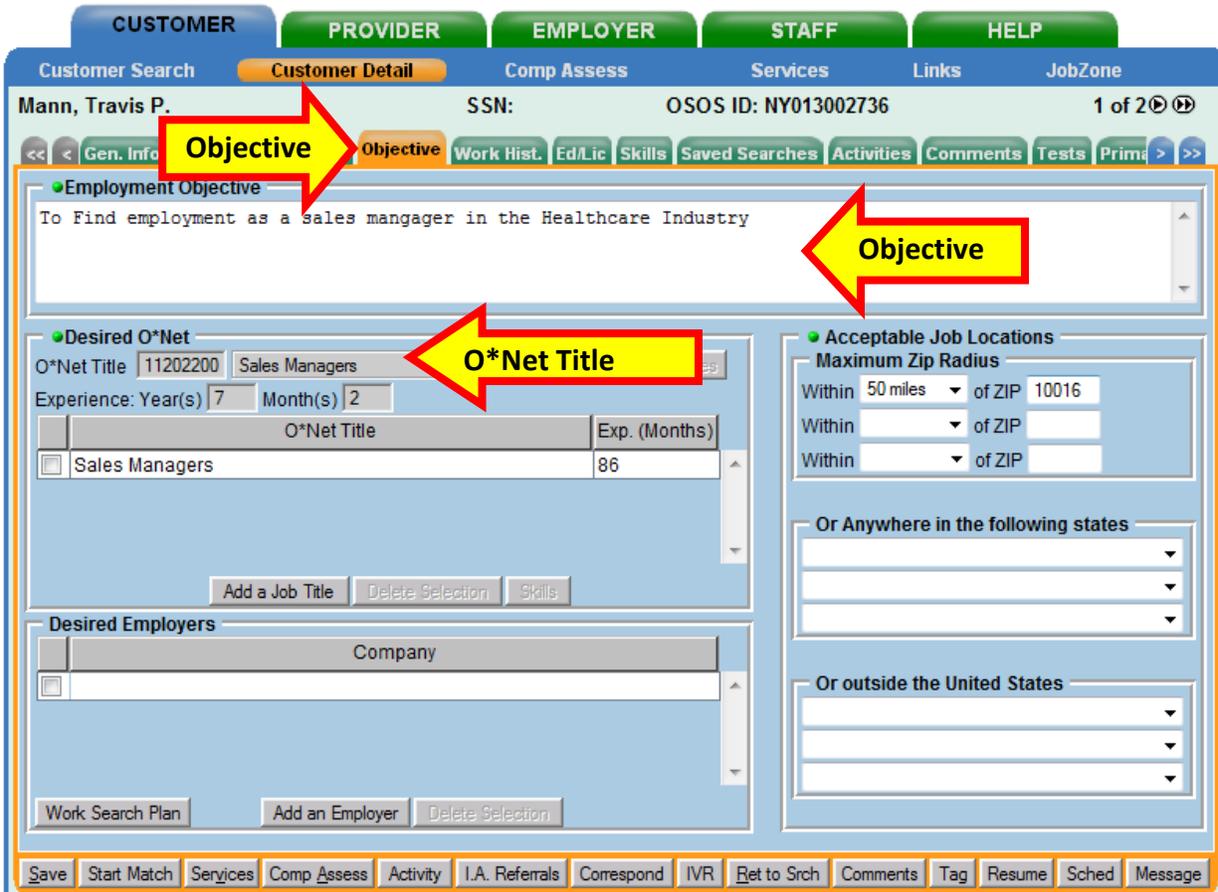
Assign To List | Remove

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

OBJECTIVE TAB

O*Net Title & Objective

The customer's Employment Objective will most likely be related to their past work history. Compare the two when reviewing the customer's record.



The screenshot displays the OSOS Customer Detail page for Travis P. Mann. The 'Objective' tab is selected, showing the following information:

- Customer Search:** Mann, Travis P., SSN: [redacted], OSOS ID: NY013002736, 1 of 2
- Navigation:** Gen. Info, **Objective**, Work Hist., Ed/Lic, Skills, Saved Searches, Activities, Comments, Tests, Prim
- Employment Objective:** To Find employment as a sales manager in the Healthcare Industry
- Desired O*Net:**
 - O*Net Title: 11202200 Sales Managers
 - Experience: Year(s) 7, Month(s) 2
 - Table:

O*Net Title	Exp. (Months)
Sales Managers	86
- Acceptable Job Locations:**
 - Maximum Zip Radius: Within 50 miles of ZIP 10016
 - Or Anywhere in the following states: [dropdown]
 - Or outside the United States: [dropdown]

Yellow arrows point to the 'Objective' tab, the 'Objective' text in the Employment Objective section, and the 'O*Net Title' text in the Desired O*Net section.



NAVIGATING BETWEEN THE CUSTOMER AND EMPLOYER MODULE

Navigate between the **Customer Module** and **Employer Module** in the Match Mode Process to compare the job order information with the customer information.

Suggestion: print the job order to reference. Highlight the requirements of the position for easy comparison.



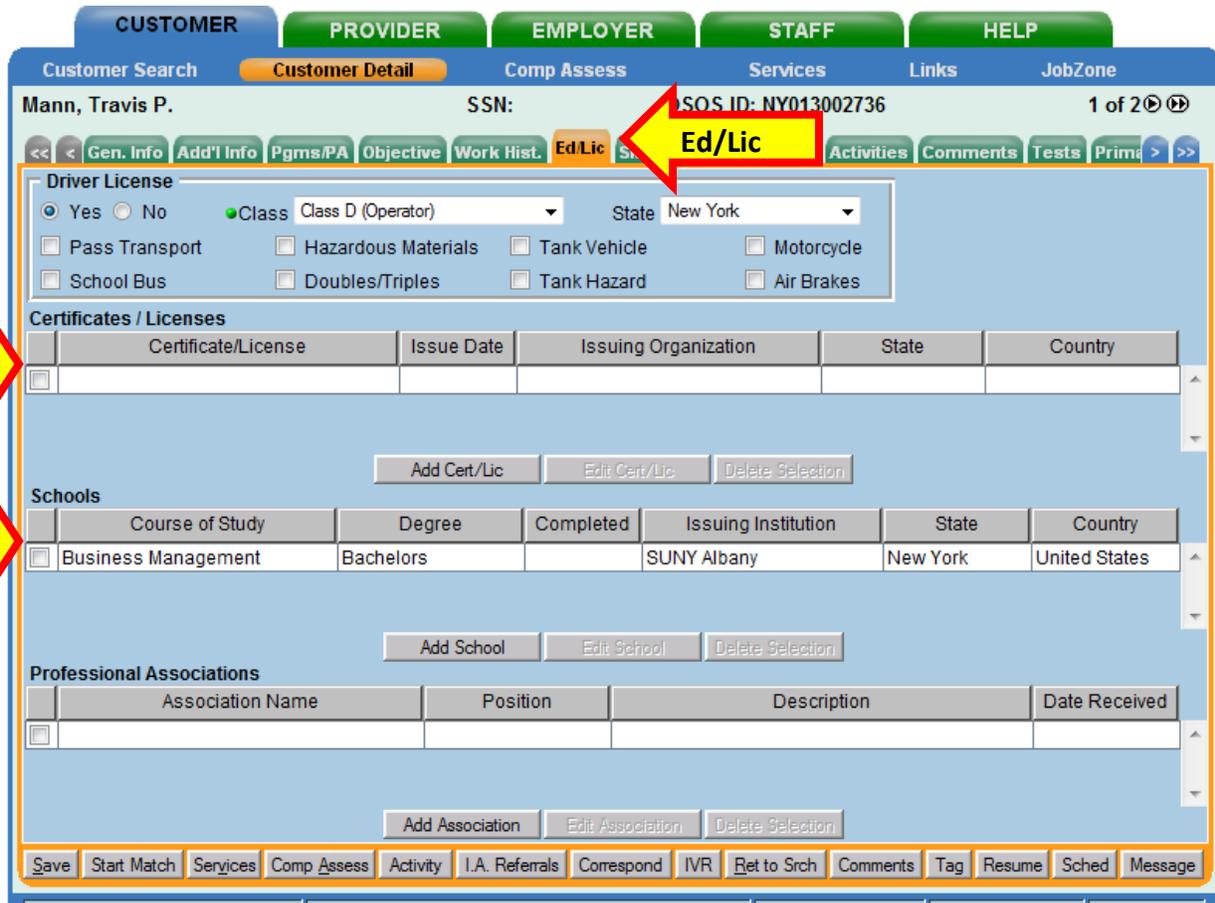
WORK HISTORY TAB

When reviewing the Work History tab review the information to determine if the customer's employment objective is appropriate based on their work history.

The screenshot displays the 'Work History' tab for the customer 'Mann, Travis P.'. The 'Work History' tab is highlighted with a red arrow. The main content area shows a detailed view of a job entry for 'Sales Managers' at 'Healthcare Corp' in 'New York'. The job details include: Job Title (Sales Managers), Employer (Healthcare Corp), Address (100 32nd street), City (New York), State (New York), Country (United States), Job Type (Full Time), and NAICS. The wage is listed as \$33.00 per hour, and the hours per week are 40. The reason for leaving is 'Lack of work', and the job duties are 'developing new sales plans, managing associates'. Below the detailed view is a table with columns for Job, Company, City, Start, and End. The table contains one entry: Sales Managers, Healthcare Corp, New York. At the bottom of the screen, there are several buttons: Save, Start Match, Services, Comp Assess, Activity, I.A. Referrals, Correspond, IVR, Ret to Srch, Comments, Tag, Resume, Sched, and Message.

EDUCATION/LICENSE TAB

If the Job Order requires a certain license, certificate or degree, check each customer's Education/License tab to review their credentials.



Ed/Lic

Driver License

Yes No Class Class D (Operator) State New York

Pass Transport Hazardous Materials Tank Vehicle Motorcycle

School Bus Doubles/Triples Tank Hazard Air Brakes

Certificates / Licenses

	Certificate/License	Issue Date	Issuing Organization	State	Country
<input type="checkbox"/>					

Add Cert/Lic Edit Cert/Lic Delete Selection

Schools

	Course of Study	Degree	Completed	Issuing Institution	State	Country
<input type="checkbox"/>	Business Management	Bachelors		SUNY Albany	New York	United States

Add School Edit School Delete Selection

Professional Associations

	Association Name	Position	Description	Date Received
<input type="checkbox"/>				

Add Association Edit Association Delete Selection

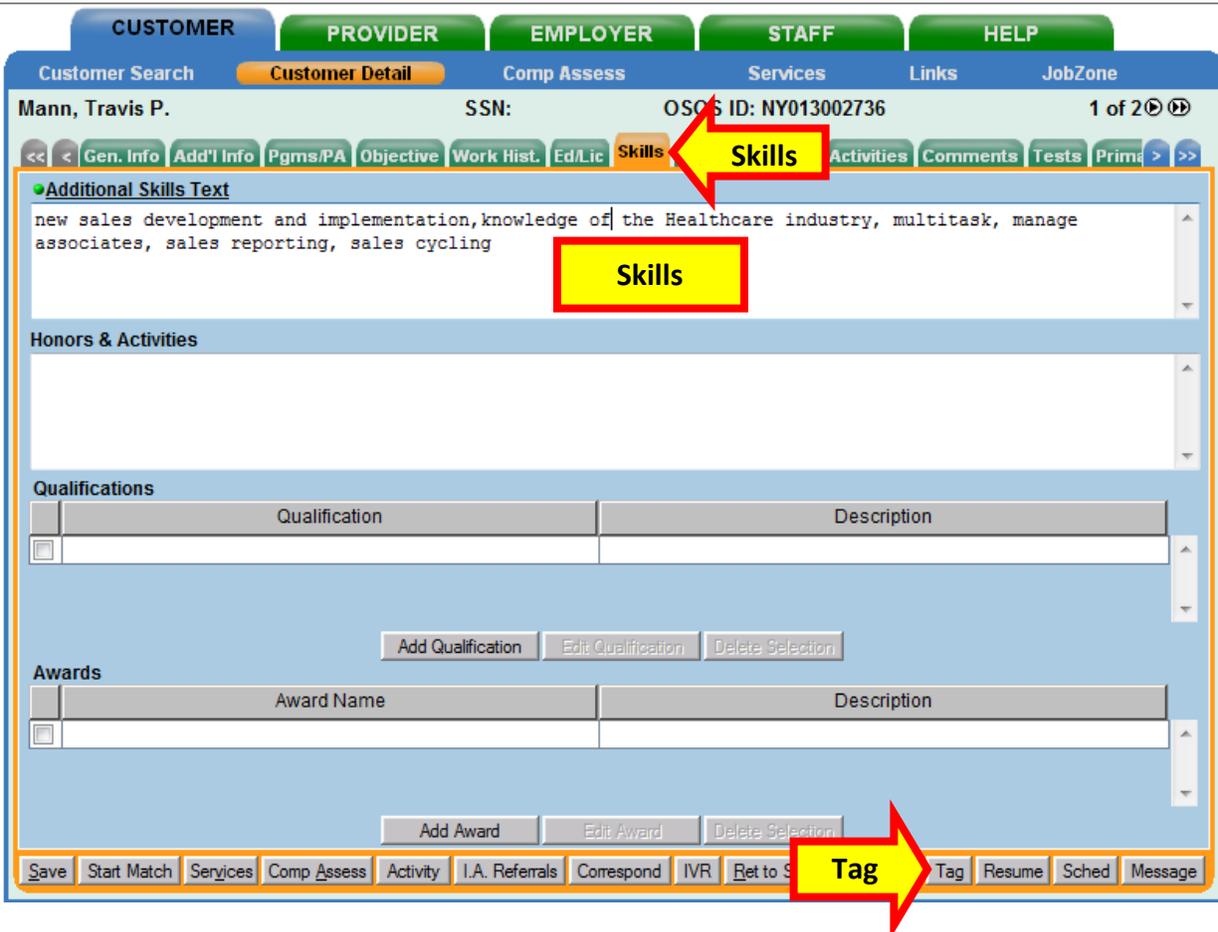
Save Start Match Services Comp Assess Activity I.A. Referrals Correspond IVR Ret to Srch Comments Tag Resume Sched Message

SKILLS TAB

Review the Skills Tab to determine if the customer's skills are relevant to the Job Order.

Tag the customer record for future reference after reviewing both the customer record and the Job order to identify that the customer meets the job opening requirements. The **Tag button** is located on the bottom of the screen.

Tag the records while you toggle through them



The screenshot displays the OSOS Customer Detail Skills Tab. The interface includes a navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with tabs for Customer Search, Customer Detail (selected), Comp Assess, Services, Links, and JobZone. The main content area displays customer information for 'Mann, Travis P.' with SSN and OSOS ID. A 'Skills' tab is selected, showing a text area with skills like 'new sales development and implementation, knowledge of the Healthcare industry, multitask, manage associates, sales reporting, sales cycling'. Below this are sections for Honors & Activities, Qualifications, and Awards. At the bottom, a 'Tag' button is highlighted with a yellow arrow.

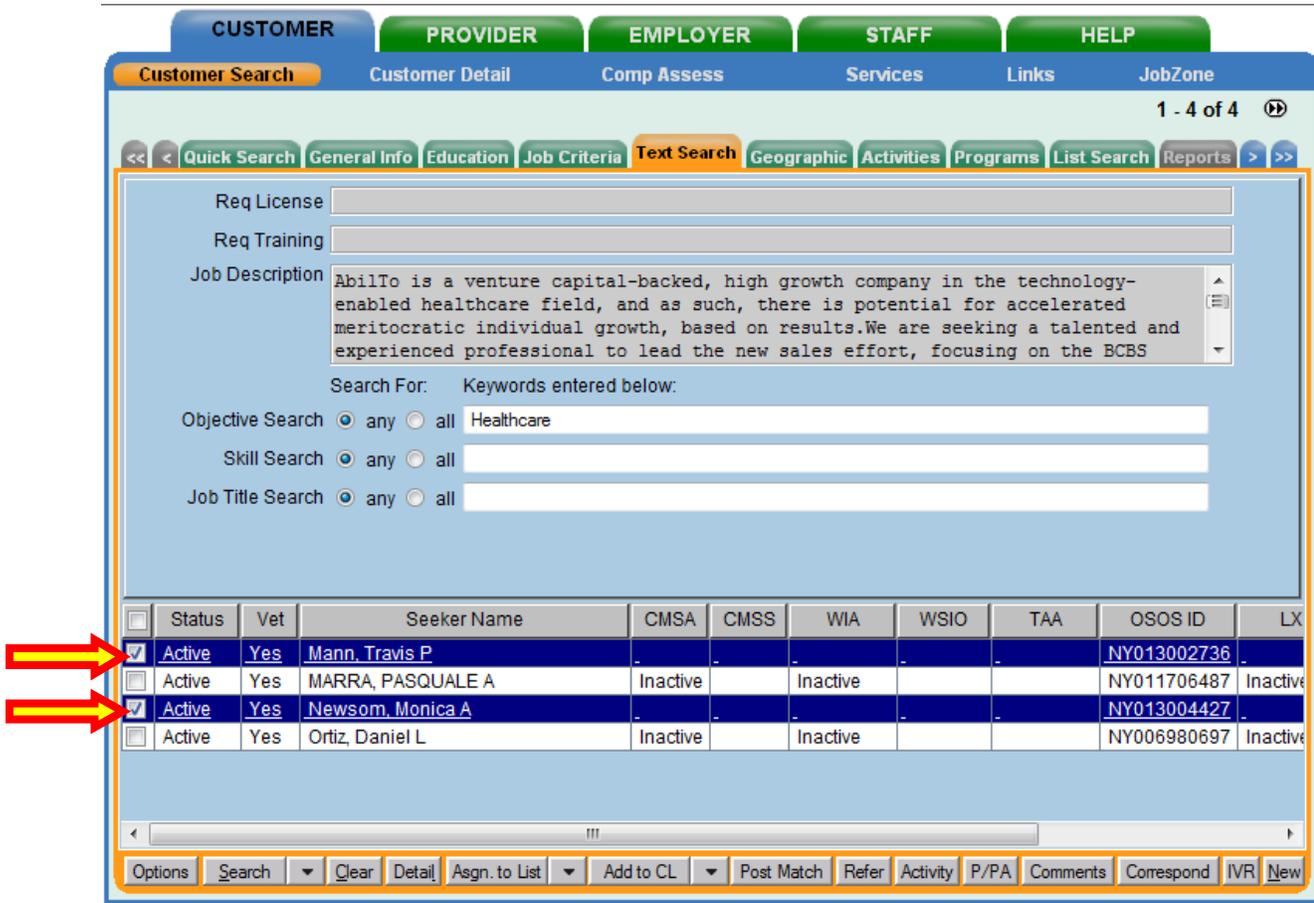
RETURN TO SEARCH LISTING

After all of the selected customer records have been reviewed in the Customer Detail Window click on the **Return to Search** button at the bottom of the screen (Ret to Srch).

This button will be active on all Customer Detail screens during the match process.



The customer records that were tagged will be highlighted.



A screenshot of the OSOS Customer Detail window. The window has 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 'Text Search' tab is active, showing search filters for 'Req License', 'Req Training', and 'Job Description'. Below the filters are search options for 'Objective Search', 'Skill Search', and 'Job Title Search'. At the bottom, there is a table of customer records with columns for Status, Vet, Seeker Name, CMSA, CMSS, WIA, WSIO, TAA, OSOS ID, and LX. Two rows are highlighted with yellow arrows: the first row for 'Mann, Travis P' and the second row for 'Newsom, Monica A'.

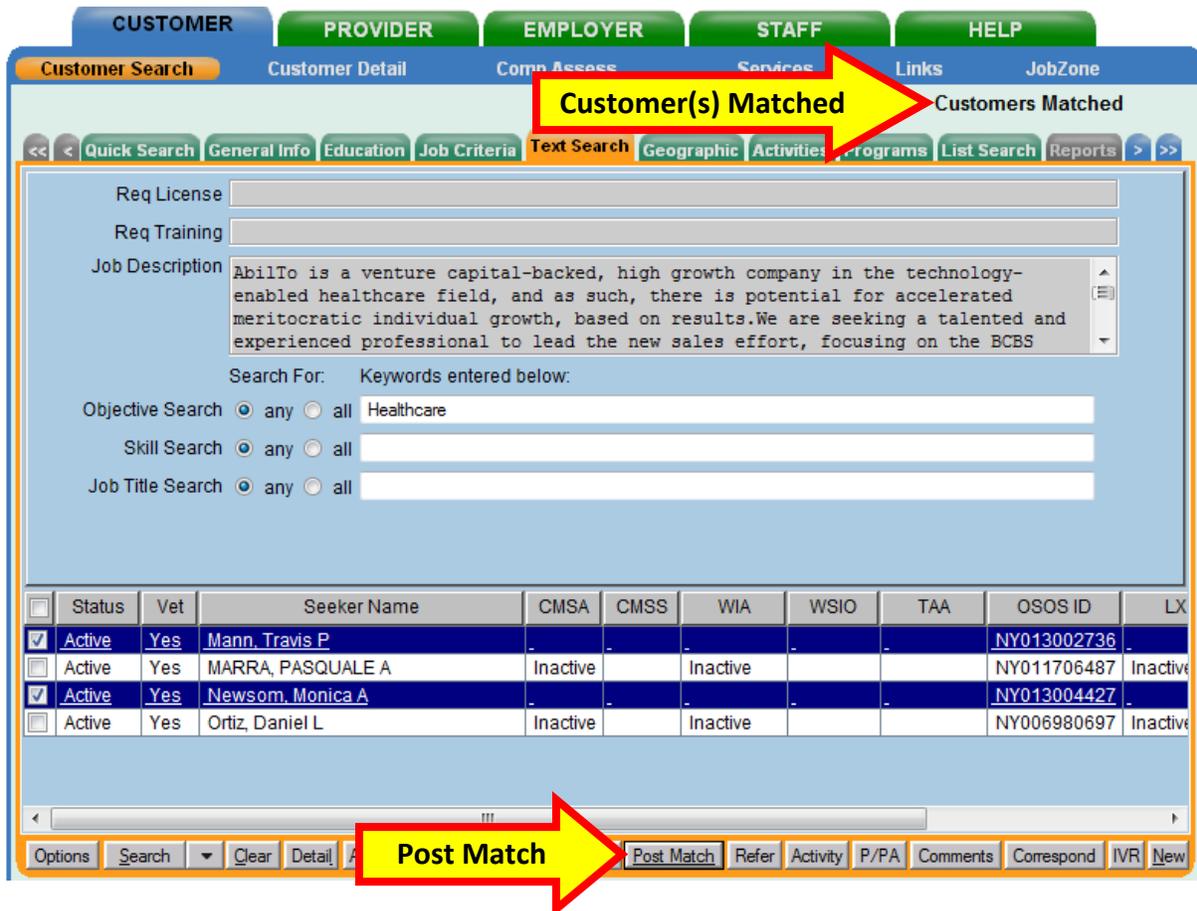
	Status	Vet	Seeker Name	CMSA	CMSS	WIA	WSIO	TAA	OSOS ID	LX
<input checked="" type="checkbox"/>	Active	Yes	Mann, Travis P	-	-	-	-	-	NY013002736	-
<input type="checkbox"/>	Active	Yes	MARRA, PASQUALE A	Inactive	-	Inactive	-	-	NY011706487	Inactive
<input checked="" type="checkbox"/>	Active	Yes	Newsom, Monica A	-	-	-	-	-	NY013004427	-
<input type="checkbox"/>	Active	Yes	Ortiz, Daniel L	Inactive	-	Inactive	-	-	NY006980697	Inactive

POSTING THE MATCH

Once the customers are tagged and they are highlighted click on the Post Match button at the bottom of the screen.

A Customer(s) Matched message will appear briefly in the upper right of the window.

Once you've clicked on the Post Match Button you are no longer in the Match Mode Process.



The screenshot shows the OSOS interface with a search results page. A yellow arrow points to a notification box in the upper right that says "Customer(s) Matched". Below the notification is a table of search results. At the bottom of the interface, a yellow arrow points to a "Post Match" button.

	Status	Vet	Seeker Name	CMSA	CMSS	WIA	WSIO	TAA	OSOS ID	LX
<input checked="" type="checkbox"/>	Active	Yes	Mann, Travis P	-	-	-	-	-	NY013002736	-
<input type="checkbox"/>	Active	Yes	MARRA, PASQUALE A	Inactive	-	Inactive	-	-	NY011706487	Inactive
<input checked="" type="checkbox"/>	Active	Yes	Newsom, Monica A	-	-	-	-	-	NY013004427	-
<input type="checkbox"/>	Active	Yes	Ortiz, Daniel L	Inactive	-	Inactive	-	-	NY006980697	Inactive



After a customer(s) has been matched to a job order the match will automatically show in three places in OSOS.

On the **Employer Module**, in the **Job Order Detail Window** in the **Matches** tab

AbilTo Order#: DE0058544 ID: NY010052875 1 of 1

Match	Staff	OSOS ID	Job Seeker	Vet
<input type="checkbox"/>	05/12/2015 MCKEEVER, KATLIN	NY013002736	Mann, Travis	Yes
<input type="checkbox"/>	05/12/2015 MCKEEVER, KATLIN	NY013004427	Newsom, Monica	Yes

On the **Customer Module** in the **Customer Detail Window** in the **Activities** tab

Mann, Travis P. OSOS ID: NY013002736 1 of 2

Activity	Activity Date	Office	Staff	Employer	Job ID	SA	FA
<input type="checkbox"/>	Match	05/12/2015	NY9999	MCKEEVER, KATL	AbilTo	DE0058544	No
<input type="checkbox"/>	New Job Seeker - Staff Assisted	05/11/2015	NY9999	MCKEEVER, KATL			No

On the **Customer Module** in the **Services Window** in the **Service History** tab

Mann, Travis P. SSN: OSOS ID: NY013002736

Service	Date	Staff	Agency	Office	SA
<input type="checkbox"/>	Match	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999
<input type="checkbox"/>	New Job Seeker - Staff Assisted	05/11/2015	KATLIN MCKEEVER	Department of Labor	NY9999

Once the match has been made, Contact the customers via mail, email (preferred) or phone to identify if the customer(s) is interested in the position.

ADDING A REFERRAL FROM THE EMPLOYER MODULE **MATCHES** TAB

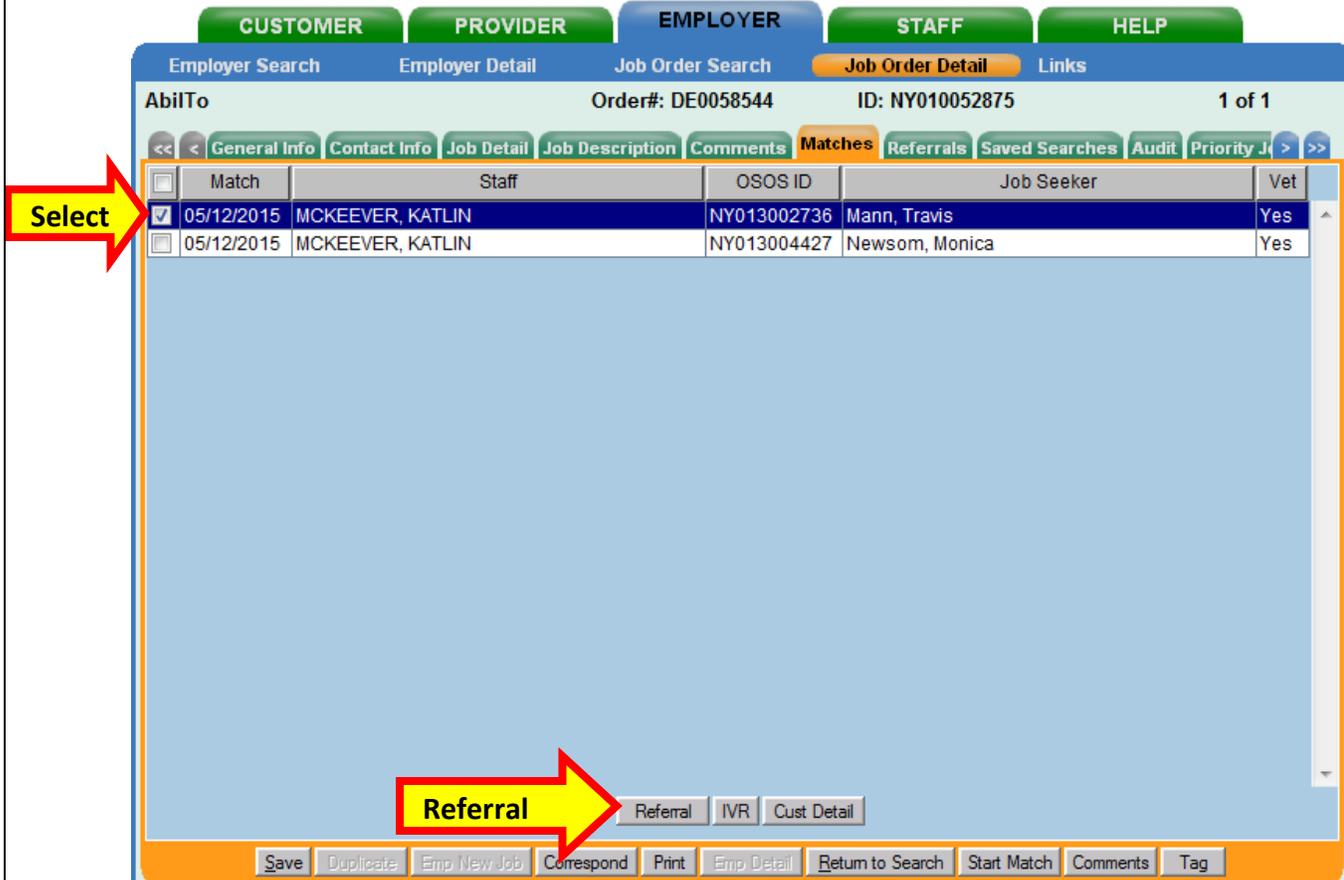
For customers that have been matched to job orders in OSOS but need to be updated to a referral:

Highlight the customer to update to a referral and click on the **Referral** button.



The user should be logged into the same office the customer is assigned to (i.e. a Troy customer will need to be referred under the Troy office)

If the user needs permissions for other offices contact the Account Box at help.osos@labor.ny.gov



The screenshot shows the OSOS interface with the 'EMPLOYER' tab selected. The 'Job Order Detail' page is open for Order# DE0058544 and ID: NY010052875. The 'Matches' tab is active, displaying a table of matches. A yellow arrow labeled 'Select' points to the first match row. At the bottom of the page, a yellow arrow labeled 'Referral' points to the 'Referral' button.

Match	Staff	OSOS ID	Job Seeker	Vet
<input checked="" type="checkbox"/>	05/12/2015 MCKEEVER, KATLIN	NY013002736	Mann, Travis	Yes
<input type="checkbox"/>	05/12/2015 MCKEEVER, KATLIN	NY013004427	Newsom, Monica	Yes

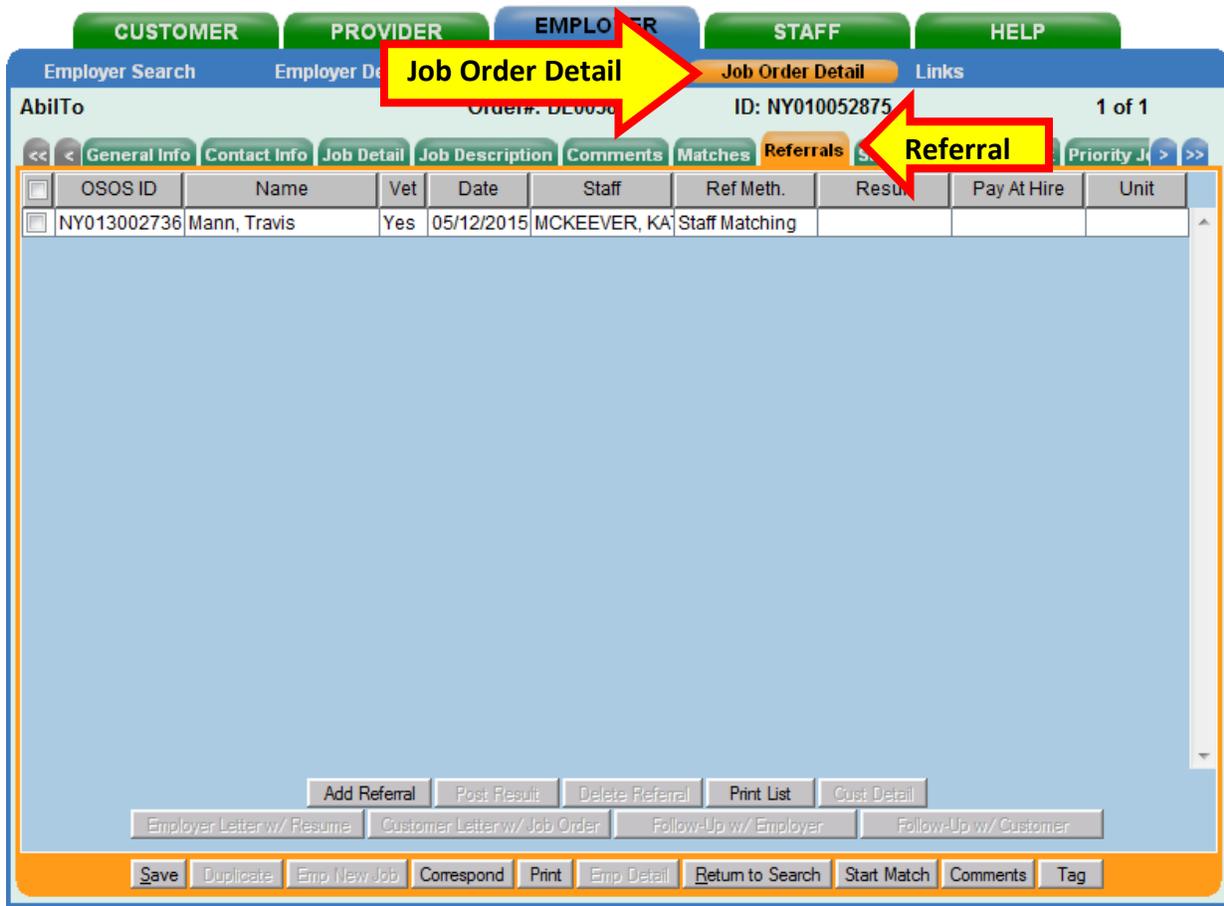
A **“Customer Referred”** message will appear briefly in the upper right of the window and the customer will be posted on the **Referrals** tab.



Match	Staff	OSOS ID	Job Seeker	Vet	
<input type="checkbox"/>	05/12/2015	MCKEEVER, KATLIN	NY013002736	Mann, Travis	Yes
<input type="checkbox"/>	05/12/2015	MCKEEVER, KATLIN	NY013004427	Newsom, Monica	Yes

ADDING A REFERRAL FROM THE EMPLOYER MODULE REFERRAL TAB

The referral is posted to the employer’s **Job Order Detail**, **Referrals** tab.



OSOS ID	Name	Vet	Date	Staff	Ref Meth.	Result	Pay At Hire	Unit
<input type="checkbox"/>	NY013002736	Mann, Travis	Yes	05/12/2015	MCKEEVER, KA	Staff Matching		

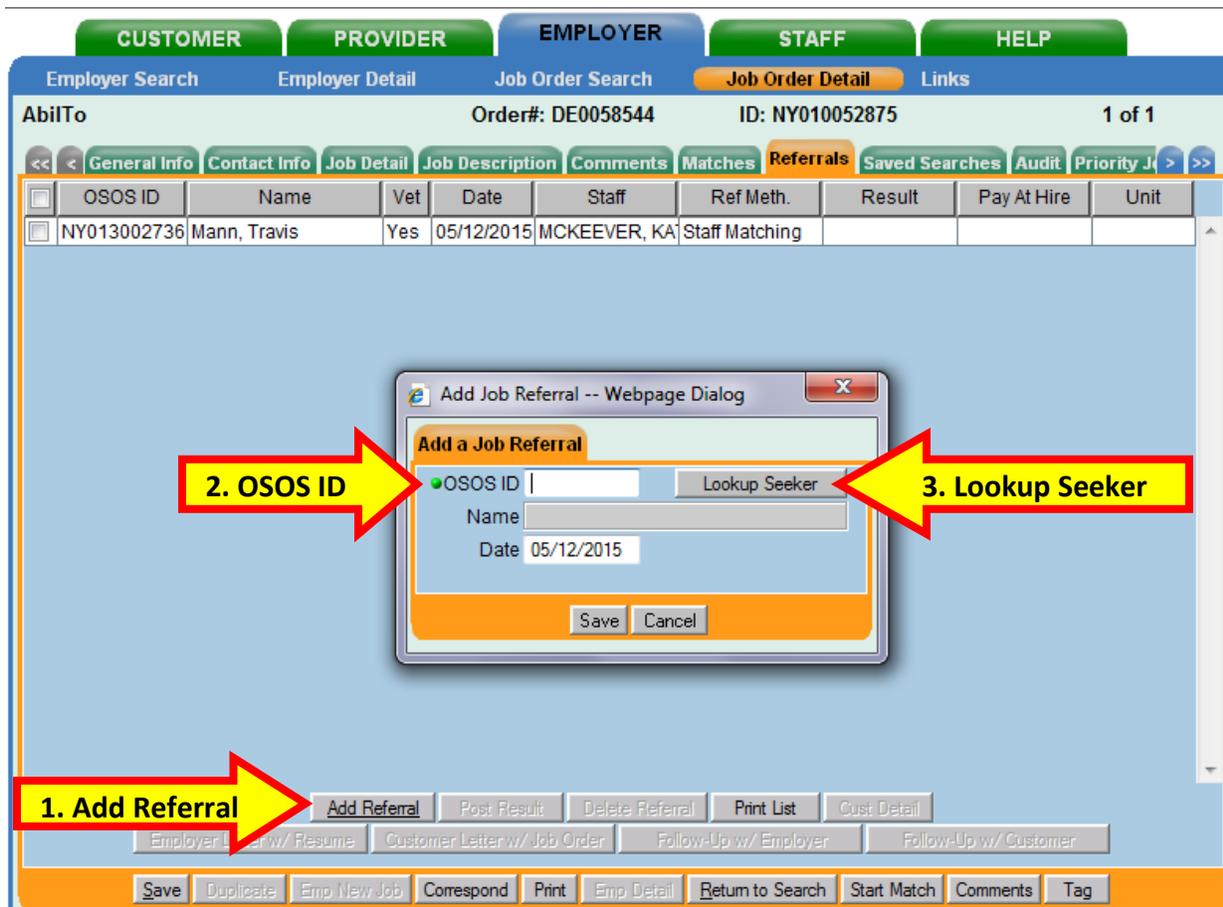
If a customer has **not** been **previously matched** the user can add a customer referral to a job order in OSOS.



A direct referral is often done when staff is working with the customer in person and the customer has confirmed that they intend to apply to the job

Click on the **Add Referral button** on this tab. The date field fills in automatically.

Enter the Customer's **OSOS ID number** in the Add Job Referral pop-up box and click on the **Lookup Seeker button**.



The screenshot shows the OSOS interface for a Job Order Detail. The main window displays a table with one row of referral data:

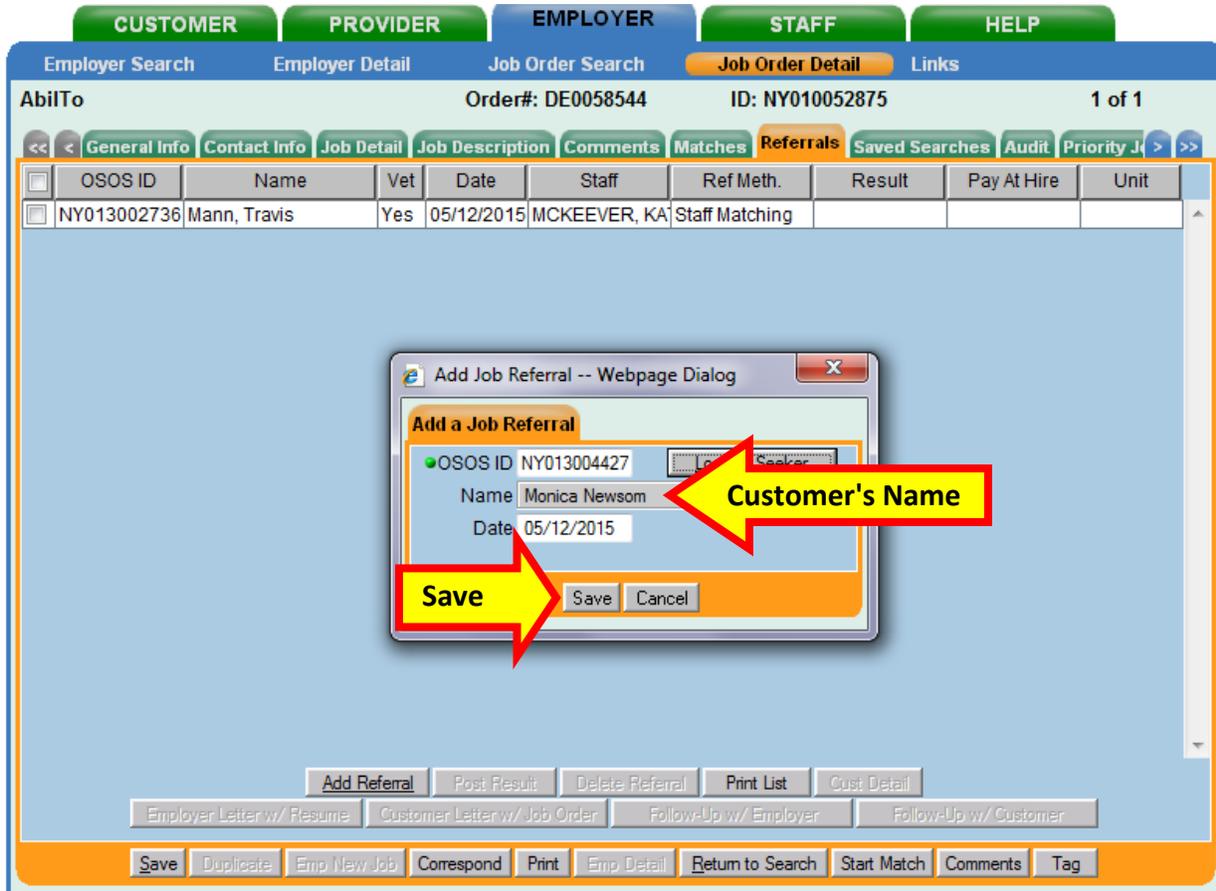
OSOS ID	Name	Vet	Date	Staff	Ref Meth.	Result	Pay At Hire	Unit
NY013002736	Mann, Travis	Yes	05/12/2015	MCKEEVER, KA	Staff Matching			

An "Add Job Referral -- Webpage Dialog" is open in the foreground. It contains the following fields and buttons:

- OSOS ID**: A text input field with a red arrow pointing to it labeled "2. OSOS ID".
- Lookup Seeker**: A button next to the OSOS ID field with a red arrow pointing to it labeled "3. Lookup Seeker".
- Name**: A text input field.
- Date**: A text input field containing "05/12/2015".
- Save** and **Cancel**: Buttons at the bottom of the dialog.

At the bottom of the main window, there is a toolbar with several buttons. A red arrow points to the **Add Referral** button, labeled "1. Add Referral". Other buttons include Post Result, Delete Referral, Print List, Cust Detail, Employer Letter w/ Resume, Customer Letter w/ Job Order, Follow-Up w/ Employer, Follow-Up w/ Customer, Save, Duplicate, Emp New Job, Correspond, Print, Emp Detail, Return to Search, Start Match, Comments, and Tag.

The customer's name will appear in the pop-up box. Click on **Save**



The screenshot displays the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail, Job Order Search, Job Order Detail (selected), and Links. The main header shows 'AbilTo' with 'Order#: DE0058544' and 'ID: NY010052875' (1 of 1). A secondary navigation bar includes: General Info, Contact Info, Job Detail, Job Description, Comments, Matches, Referrals (selected), Saved Searches, Audit, and Priority J. A table lists job referrals with columns: OSOS ID, Name, Vet, Date, Staff, Ref Meth., Result, Pay At Hire, and Unit. One entry is visible: NY013002736, Mann, Travis, Yes, 05/12/2015, MCKEEVER, KA, Staff Matching. A 'Webpage Dialog' titled 'Add Job Referral' is open, showing a search for OSOS ID 'NY013004427' which returned 'Monica Newsom'. The dialog has fields for OSOS ID, Name, and Date. A red arrow points to the 'Name' field with the text 'Customer's Name'. Another red arrow points to the 'Save' button in the dialog.

OSOS ID	Name	Vet	Date	Staff	Ref Meth.	Result	Pay At Hire	Unit
NY013002736	Mann, Travis	Yes	05/12/2015	MCKEEVER, KA	Staff Matching			

Add Job Referral -- Webpage Dialog

Add a Job Referral

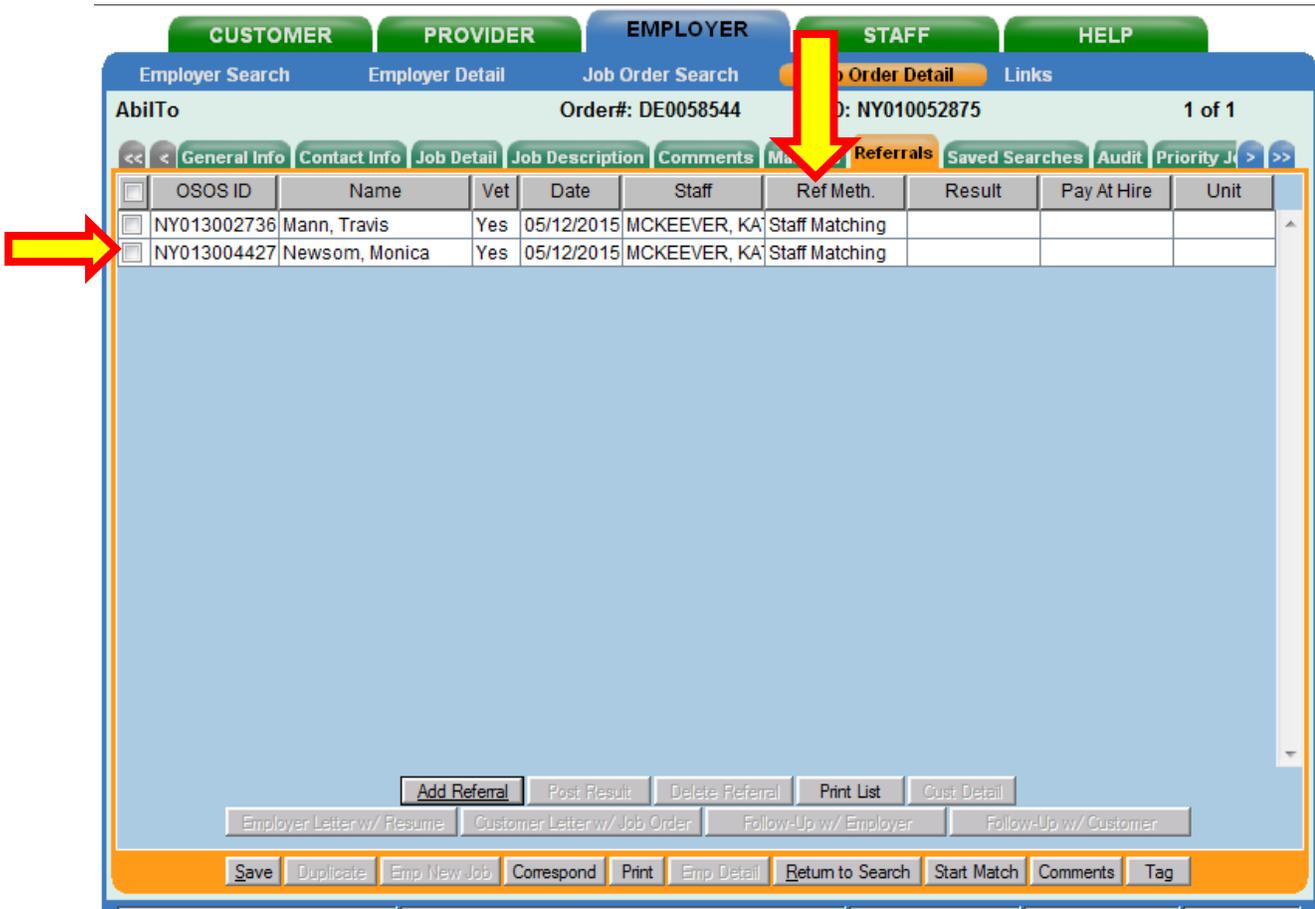
OSOS ID: NY013004427

Name: Monica Newsom

Date: 05/12/2015

Save Save Cancel

The customer will be added as a referral.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Employer Search, Employer Detail, Job Order Search, Job Order Detail, and Links. The main content area displays 'AbilTo' with 'Order#: DE0058544' and 'ID: NY010052875'. A yellow arrow points to the 'Referrals' tab. Below the tabs is a table with the following data:

<input type="checkbox"/>	OSOS ID	Name	Vet	Date	Staff	Ref Meth.	Result	Pay At Hire	Unit
<input type="checkbox"/>	NY013002736	Mann, Travis	Yes	05/12/2015	MCKEEVER, KA	Staff Matching			
<input type="checkbox"/>	NY013004427	Newsom, Monica	Yes	05/12/2015	MCKEEVER, KA	Staff Matching			

At the bottom of the interface, there are several buttons: Add Referral, Post Result, Delete Referral, Print List, Cust Detail, Employer Letter w/ Resume, Customer Letter w/ Job Order, Follow-Up w/ Employer, Follow-Up w/ Customer, Save, Duplicate, Emp New Job, Correspond, Print, Emp Detail, Return to Search, Start Match, Comments, and Tag.



After the referral is saved it will be recorded in 3 locations in OSOS.

On the **Employer Module** in the **Job Order Detail Window** in the **Referrals Tab**

The screenshot shows the 'EMPLOYER' module with the 'Job Order Detail' window open. The 'Referrals' tab is selected. Red arrows point to the 'Employer' button in the top navigation bar, the 'Job Order Detail' button in the sub-navigation bar, and the 'Referrals' button in the main navigation bar. The table below shows two referrals:

OSOS ID	Name	Vet	Date	Staff	Ref Meth.	Result	Pay At Hire	Unit
NY013002736	Mann, Travis	Yes	05/12/2015	MCKEEVER, KA	Staff Matching			
NY013004427	Newsom, Monica	Yes	05/12/2015	MCKEEVER, KA	Staff Matching			

On the **Customer Module** in the **Customer Detail Window** in the **Activities Tab**

The screenshot shows the 'CUSTOMER' module with the 'Customer Detail' window open. The 'Activities' tab is selected. Red arrows point to the 'Customer' button in the top navigation bar, the 'Customer Detail' button in the sub-navigation bar, and the 'Activities' button in the main navigation bar. The table below shows various activities:

Activity	Activity Date	Office	Staff	Employer	Job ID	SA	FA
Match	05/12/2015	NY9999	MCKEEVER, KATL	AbilTo	DE0058544	No	
Common Measures Enrollment	05/12/2015	NY9999	MCKEEVER, KATL			Yes	
Labor Exchange Enrollment	05/12/2015	NY9999	MCKEEVER, KATL			Yes	
New Job Seeker - Staff Assisted	05/12/2015	NY9999	MCKEEVER, KATL				No
Interstate Job Referral	05/12/2015	NY9999	MCKEEVER, KATL	AbilTo	DE0058544		No

On the **Customer Module** in the **Services Window** in the **Service History tab**

The screenshot shows the 'CUSTOMER' module with the 'Services' window open. The 'Service History' tab is selected. Red arrows point to the 'Customer' button in the top navigation bar, the 'Service History' button in the sub-navigation bar, and the 'Services' button in the main navigation bar. The table below shows service history records:

Service	Date	Staff	Agency	Office	SA
Match	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999	
New Job Seeker - Staff Assisted	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999	
Common Measures Enrollment	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999	Yes
Labor Exchange Enrollment	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999	Yes
Interstate Job Referral	05/12/2015	KATLIN MCKEEVER	Department of Labor	NY9999	



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