Matching & Referring from the Job Order to the Customer Record OSOS Guide

12/22/2017

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PURPOSE

This guide is intended to help staff understand the basics of performing job order matching and job referrals. Job matching is a process that compares information on the customer's OSOS record with information on open job orders to determine if the customer's experience and education meets the business' needs/requirements.

Staff should be conducting job matches, with or without the customer present, to identify open job orders that are a good fit for the customer.

The guide will walk through the steps of how to:

- Perform a job order search
- Review desired job orders
- Search, match, and refer customers to a job order

JOB ORDER SEARCH

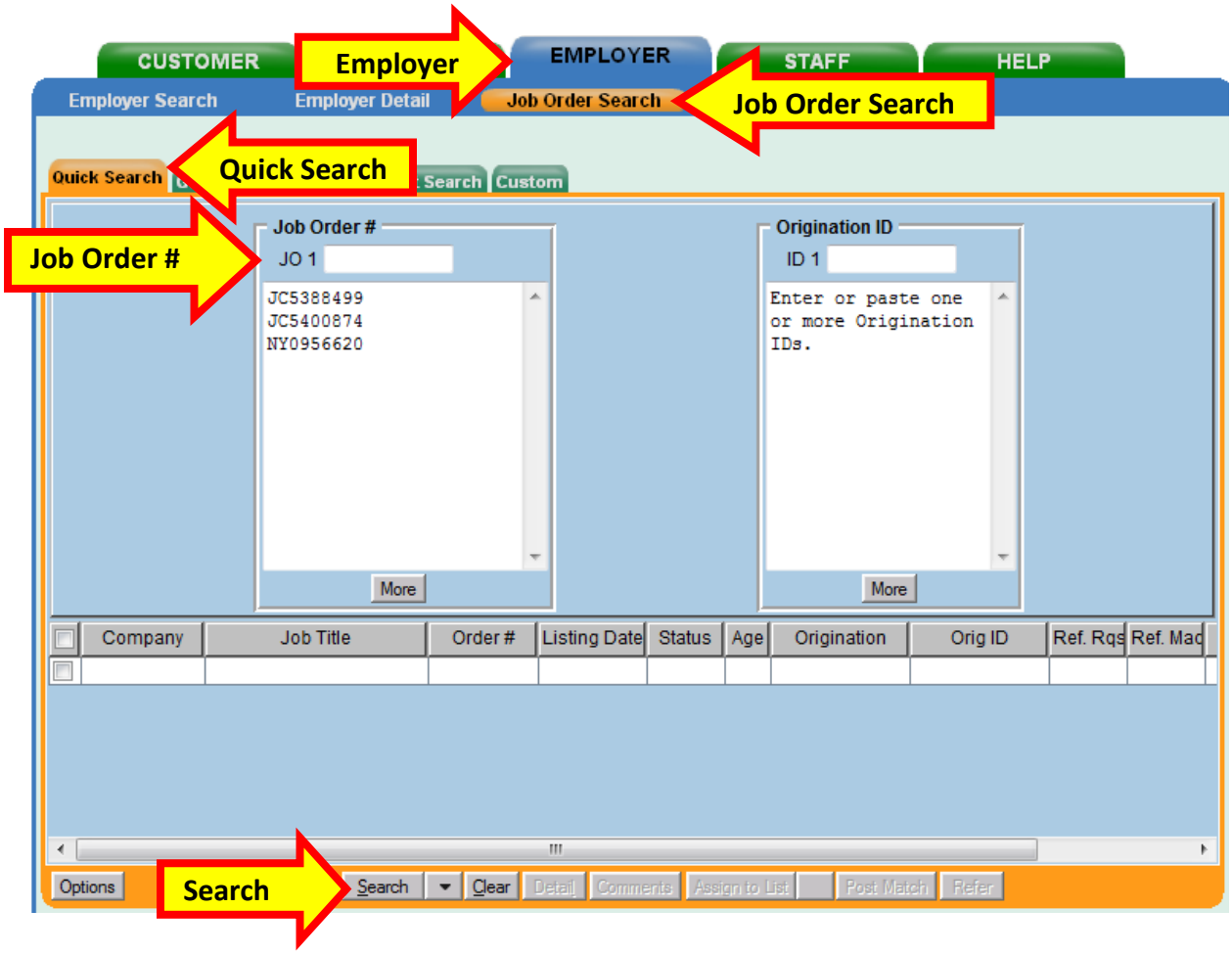
JOB ORDER SEARCH - JOB ORDER NUMBER

The most common method used to search for a job order is by the job order number.

To perform a job order search, select the **Employer** module, then the **Job Order Search** window, and then use the **Quick Search** tab.

Add the job order number or multiple job order numbers in the **Quick Search** tab.

The job order number search is a standalone search. It is not necessary to add any additional search criteria.



JOB ORDER SEARCH - GENERAL INFO TAB

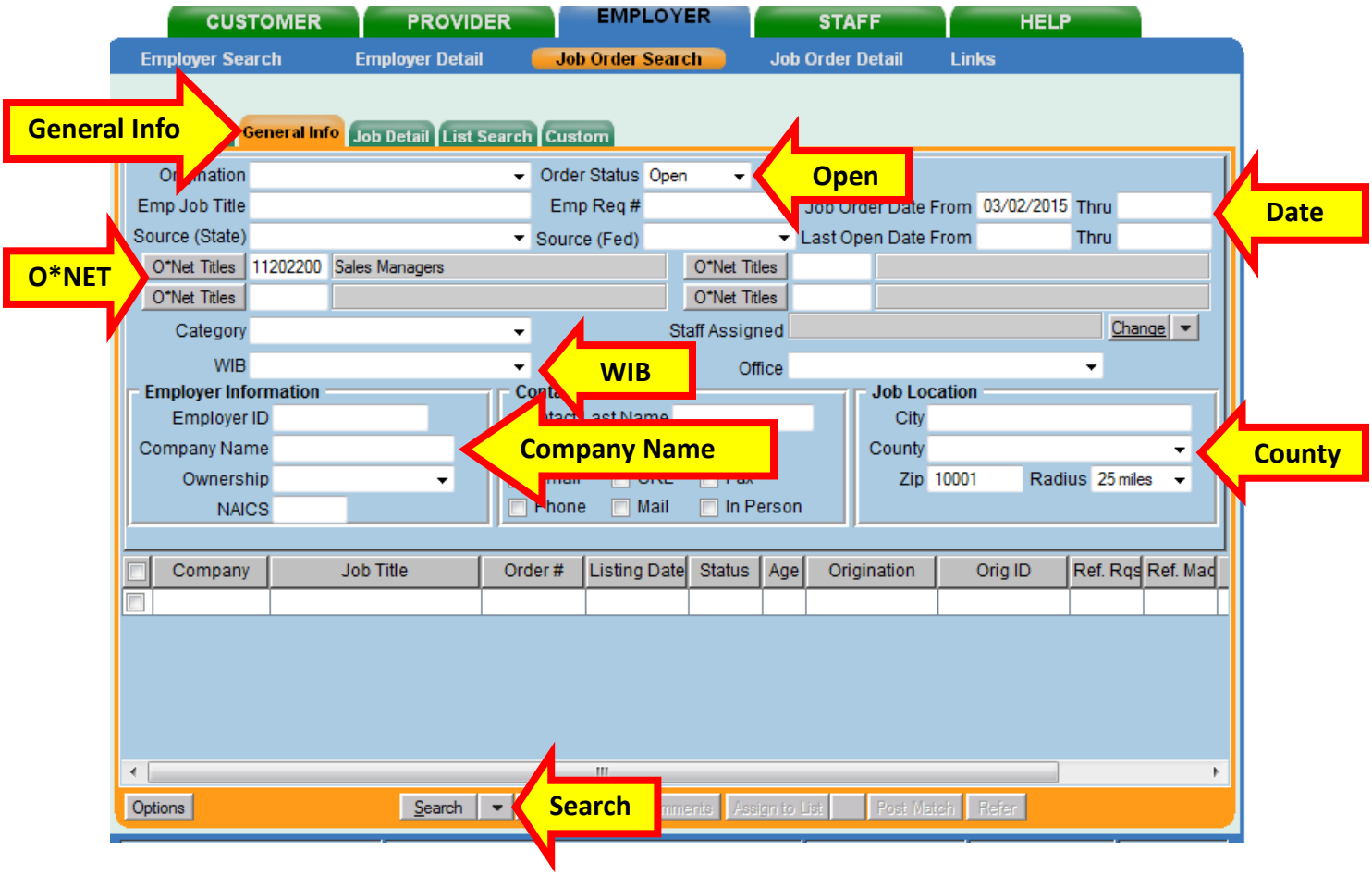
If the job order number is unknown, search by using the **General Info** tab.

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.

As a best practice, when entering the **Job Order Date** pick a date that is a week before the current date and leave the **Thru** data field blank. This search will yield results for open job orders posted in the last week.

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

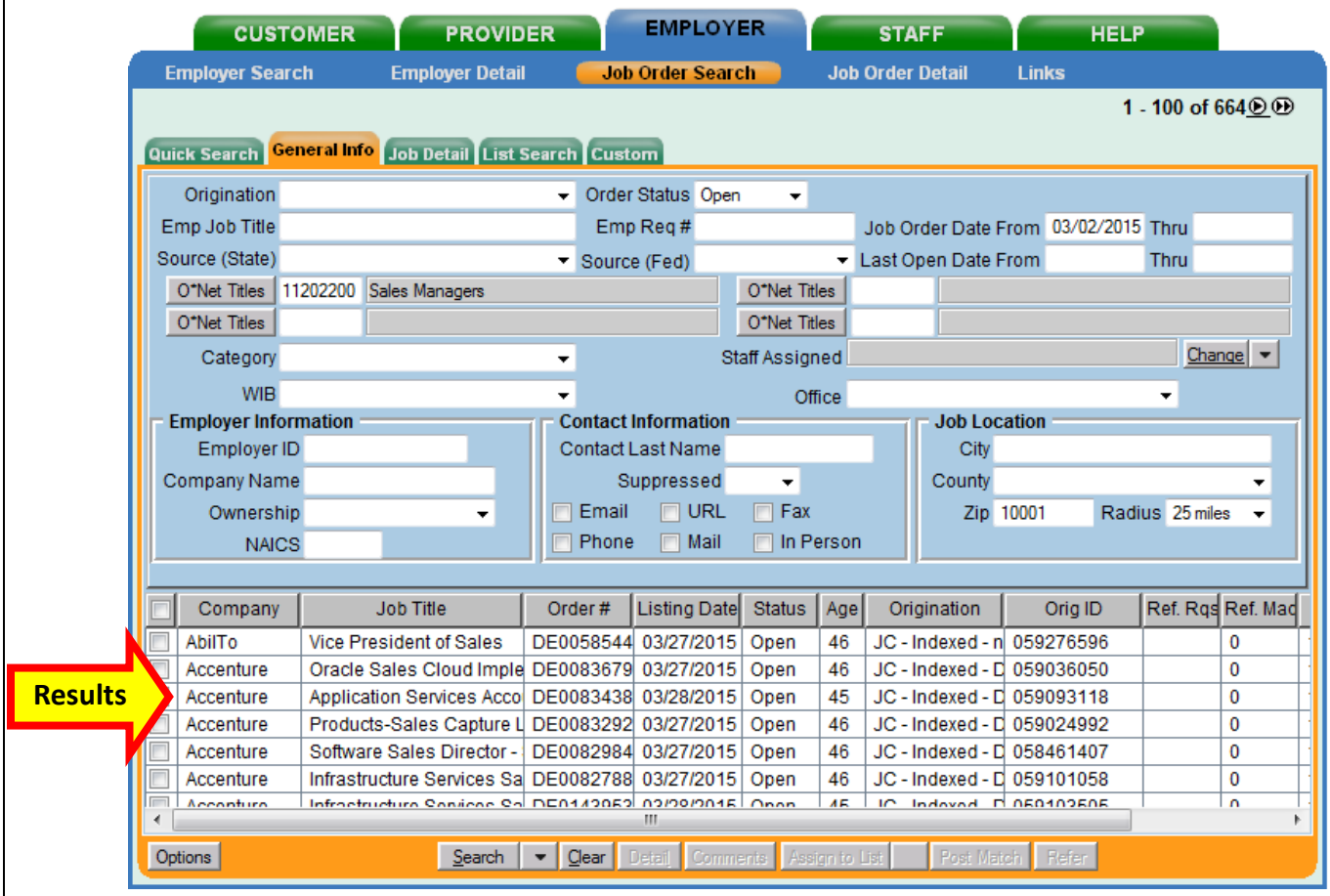
Searching by multiple O*Net Titles will provide one inclusive set of results.



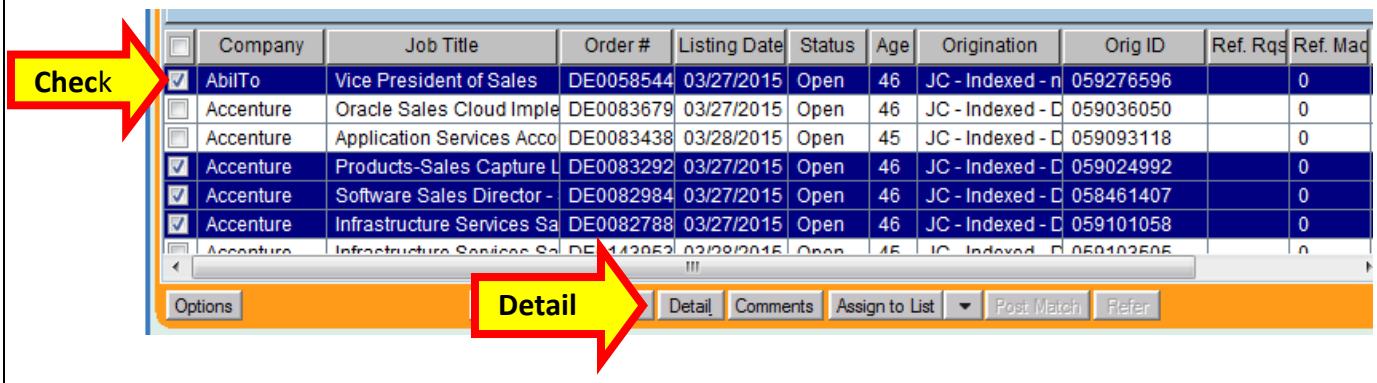
JOB ORDER SEARCH - RESULTS

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

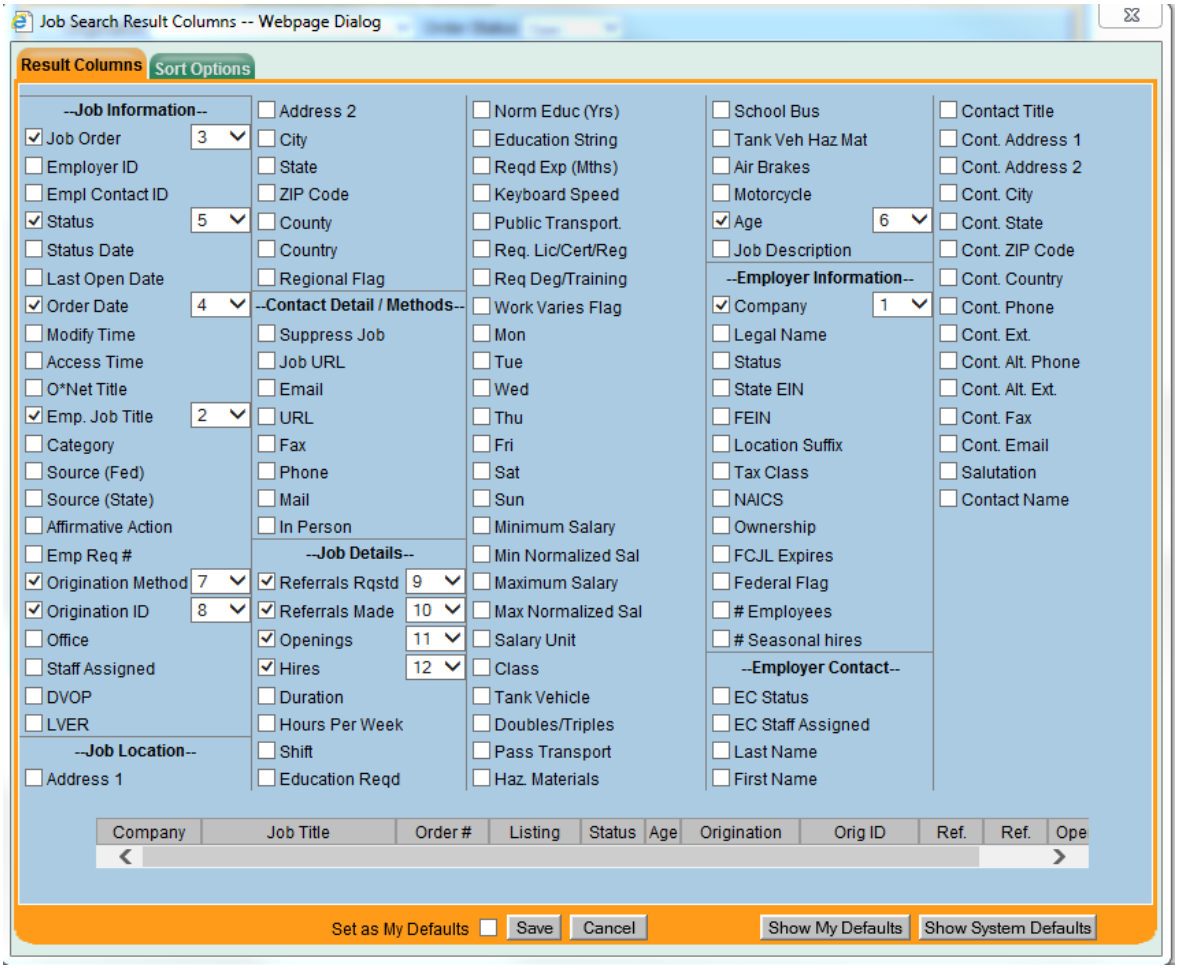
If the WIB is included in the search, the search will only yield staff-entered job orders; the more data fields completed, the narrower the results will be.



Highlight the job orders to review and click the **Detail** button.



To customize the search results, click the **Options** button to open the Job Search Result Columns dialog box and select the columns and sorting order preferred.



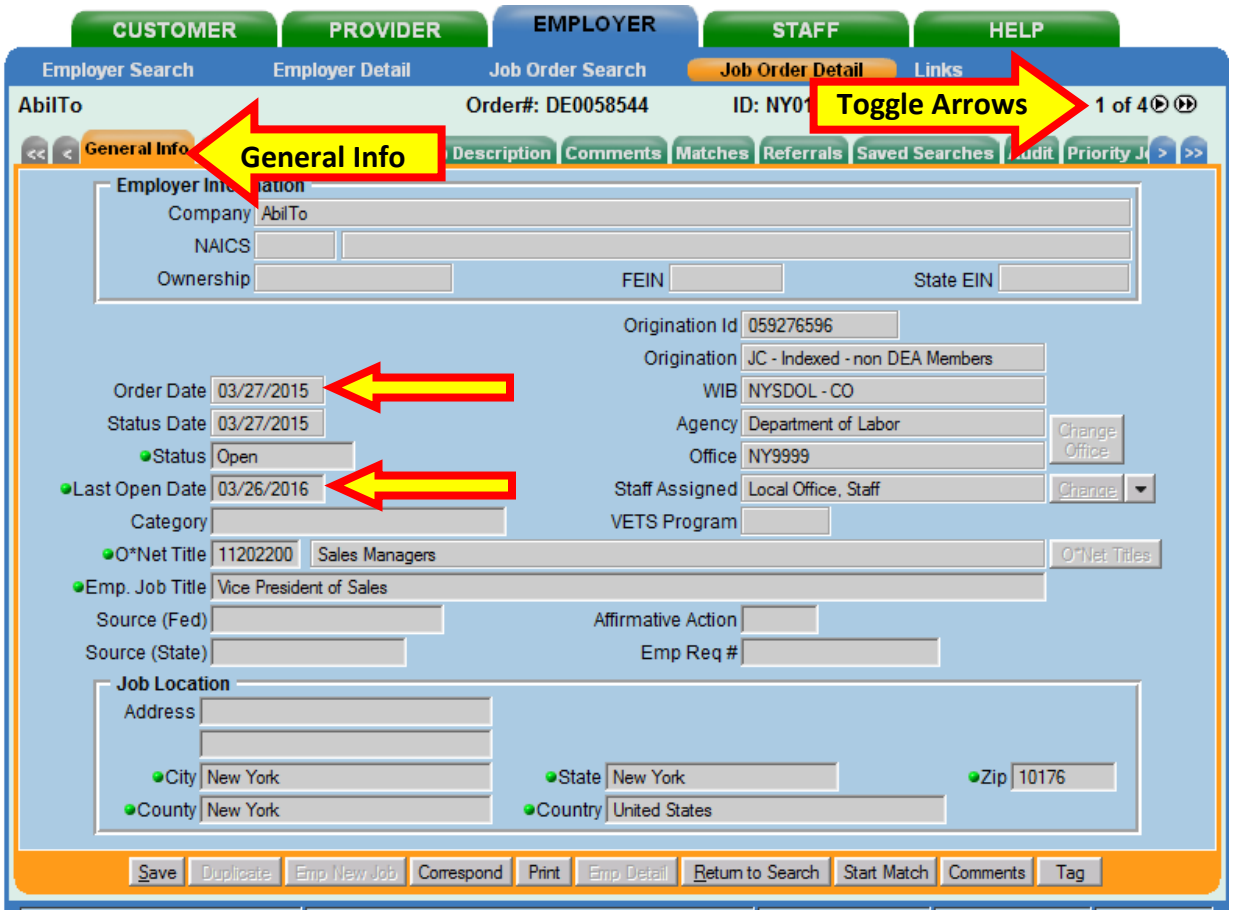
REVIEWING THE JOB ORDERS

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

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

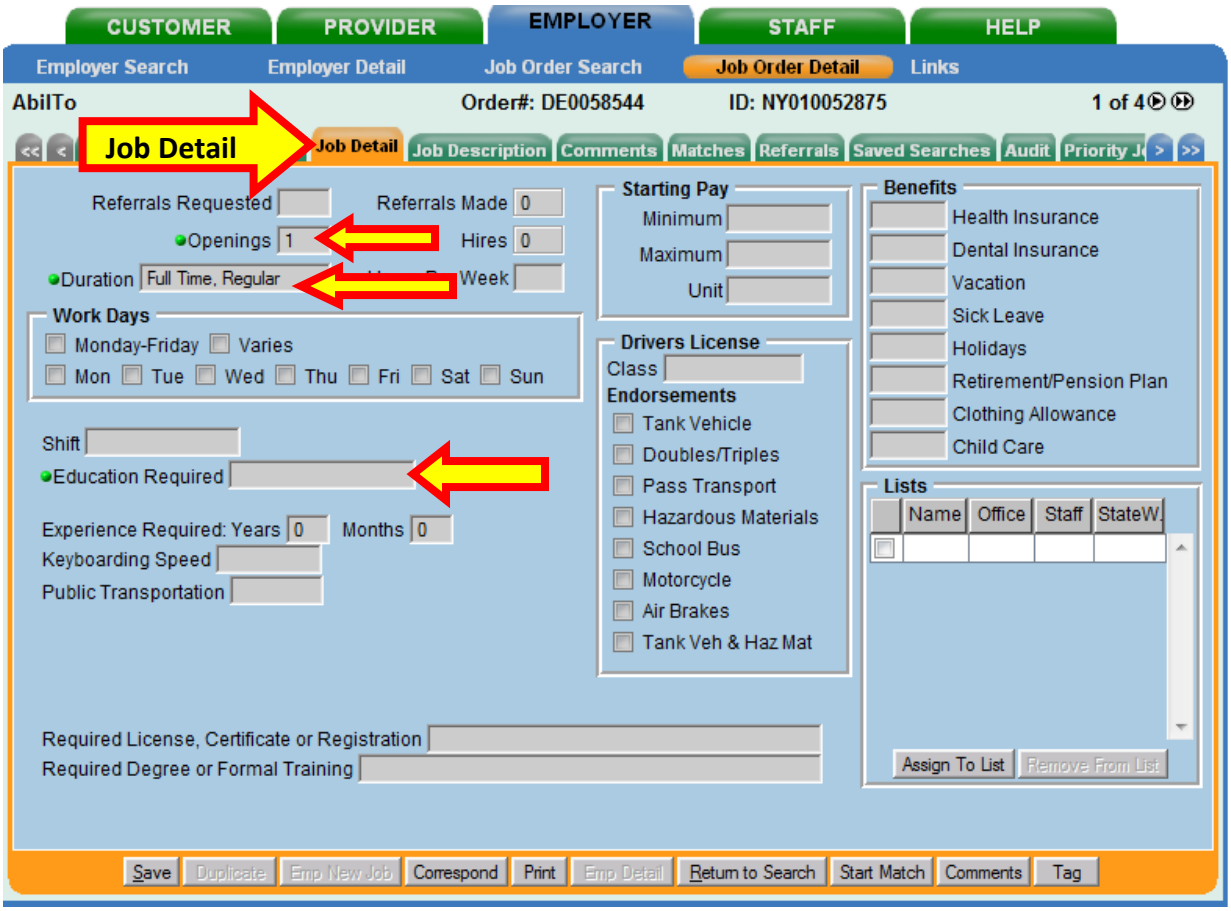
In the **General Info** tab, check the **Order Date** data field to see how long the job order has been open. If the date listed in this field is more than 2 months old, research the job order to see if the position is still available. If the job order is current, continue with the matching process.

The **Last Open Date** data field indicates how long the job order will remain open.



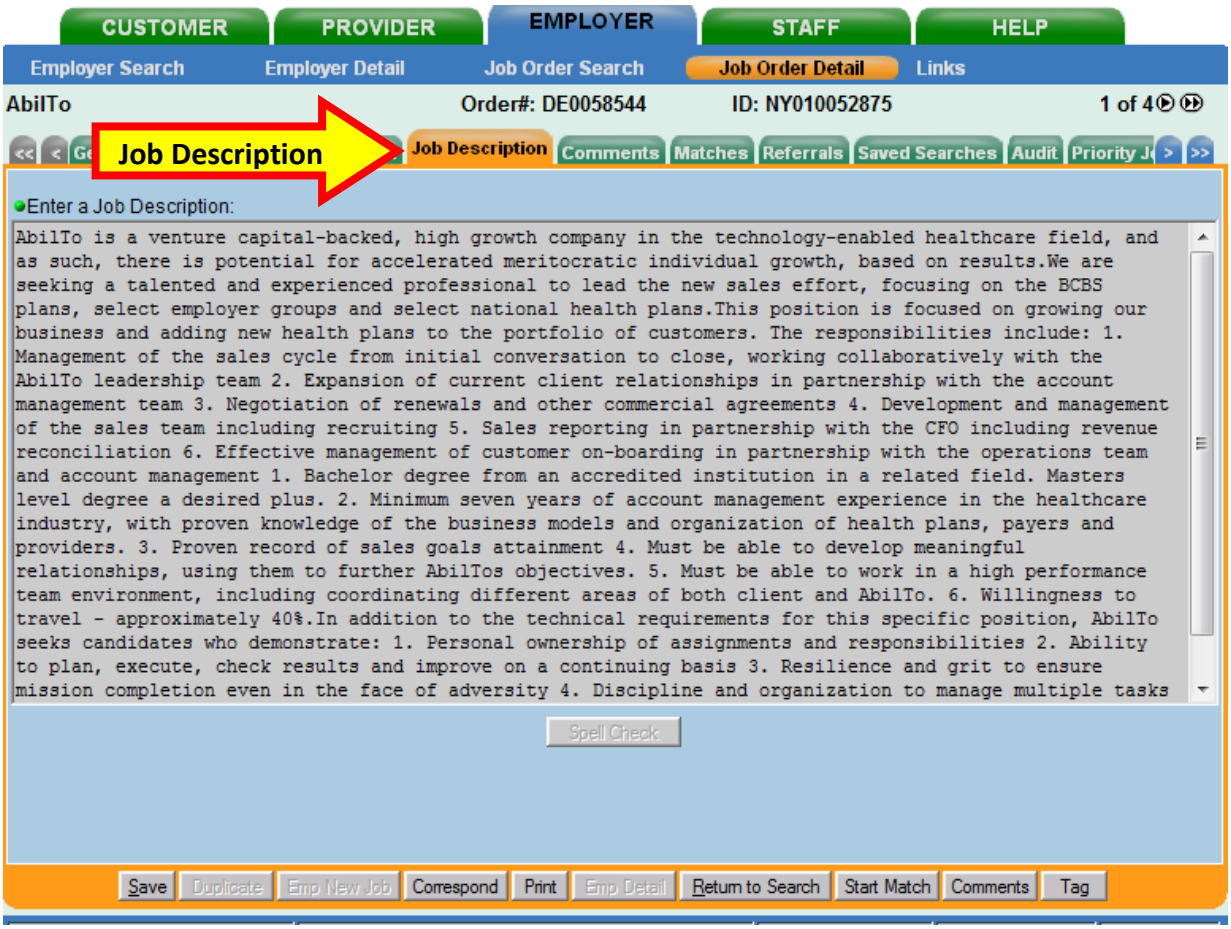
JOB DETAIL TAB

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



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.



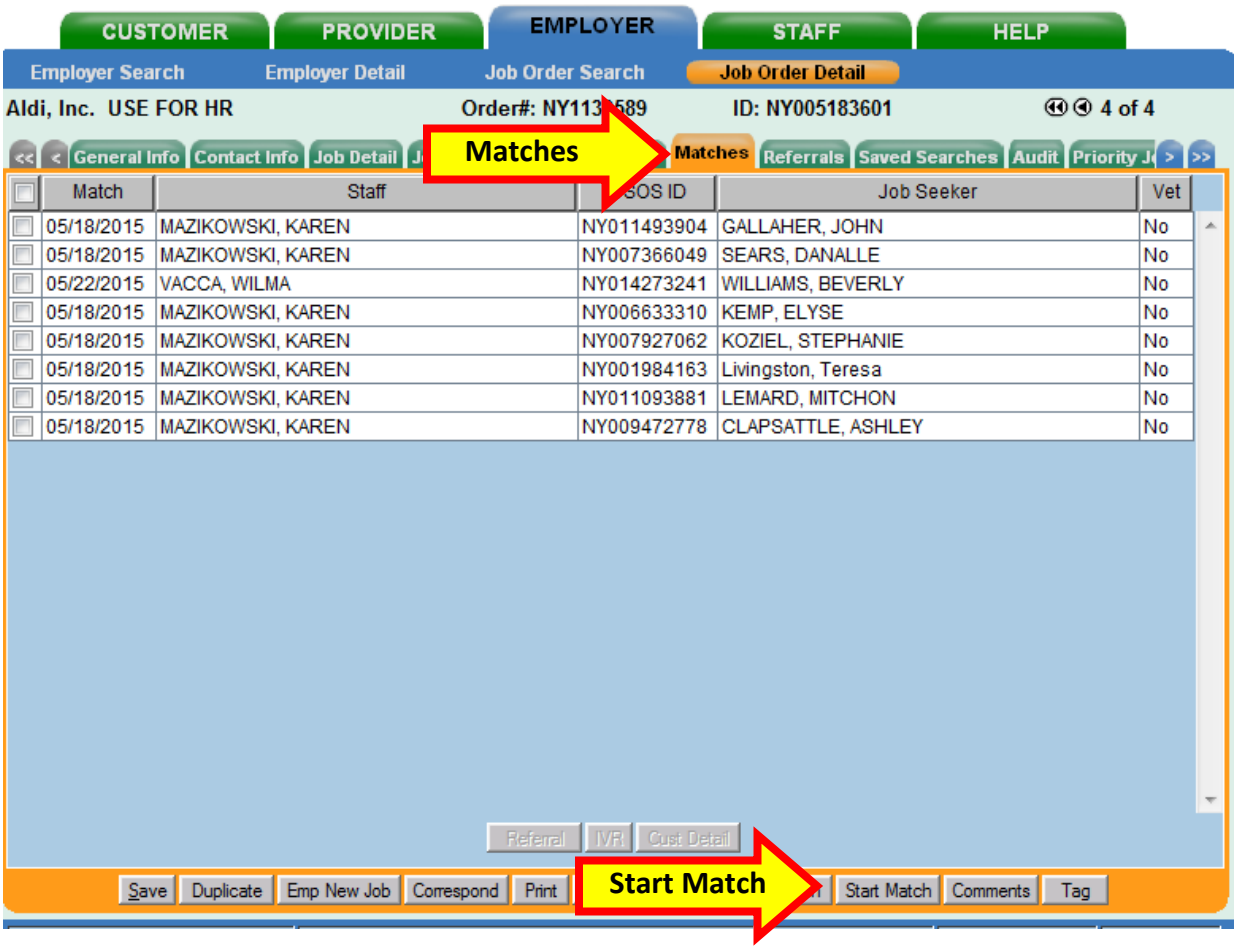
MATCHES TAB

Look in the **Matches** tab. If matching has been completed by another staff member, the results will be displayed here. If matches were completed recently by another staff member, then new match results may be lower than usual.

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.

Click the **Start Match** button to start the job matching process.

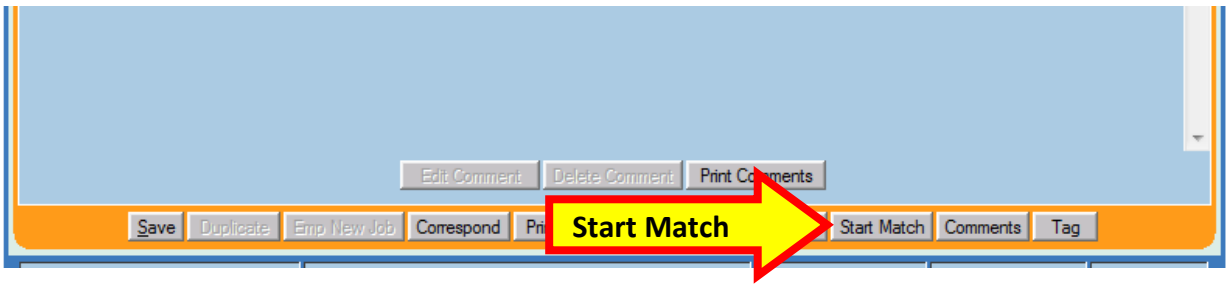
As a best practice, staff should take in account their local labor market and customer talent pool. Reviewing the business jacket and job order details will help determine if additional matching is necessary.



START MATCH

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

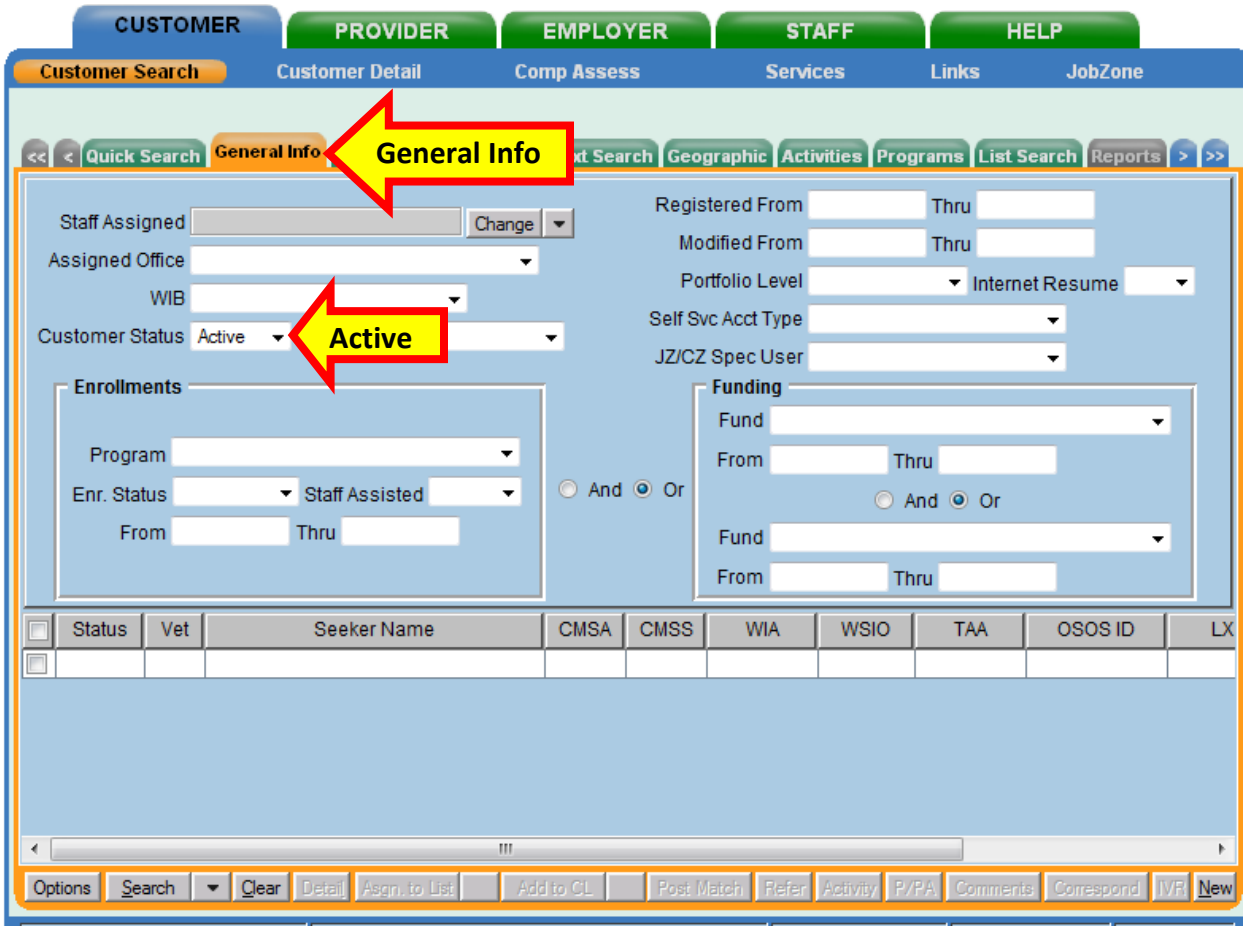
The **Start Match** button is available on all **Job Order Detail** window tabs.



CUSTOMER SEARCH - GENERAL INFO TAB

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

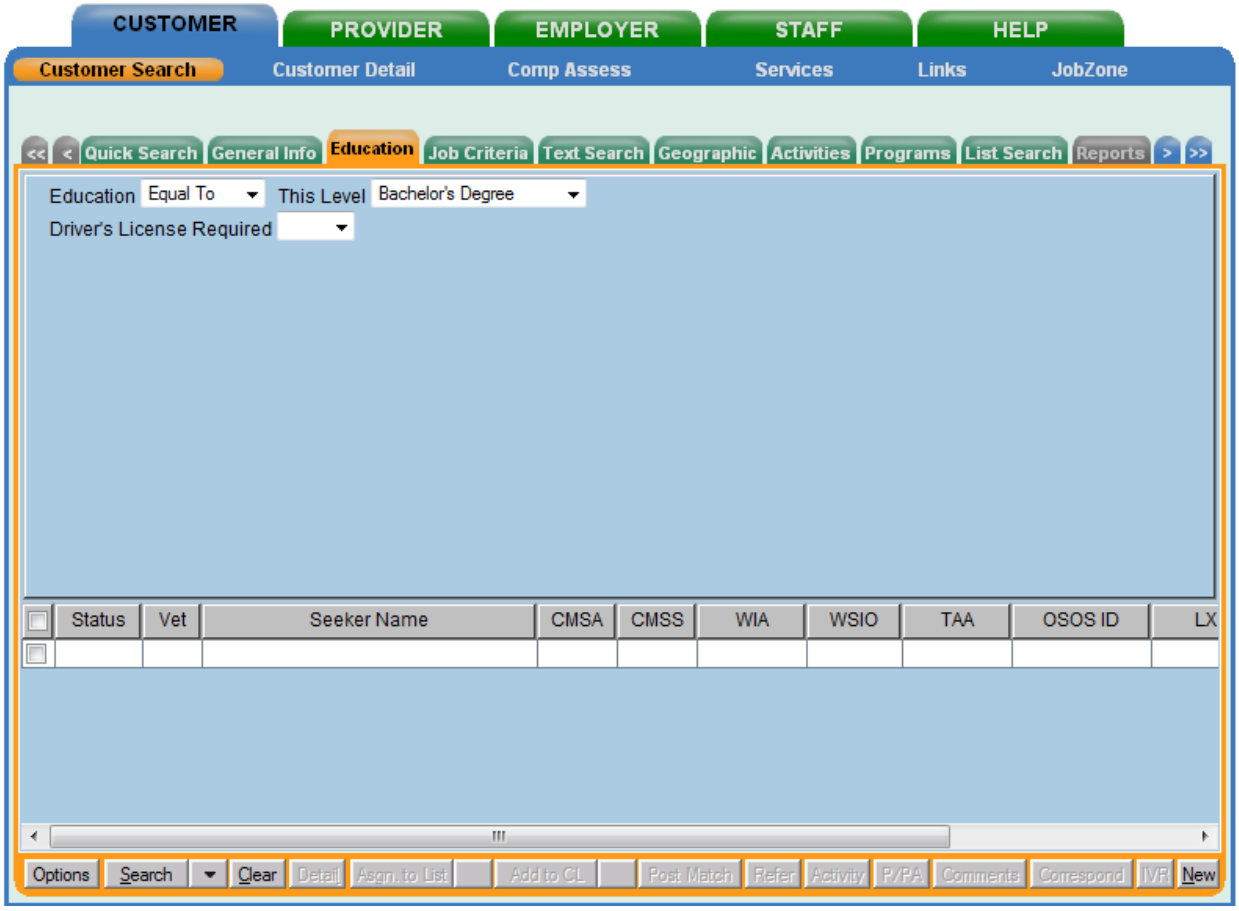
Other fields may be used to narrow the search if results are too high.



CUSTOMER SEARCH - EDUCATION TAB

When the education level is entered in the **Job Detail** tab of the job order, the data fields in the **Education** tab automatically populate from the job order.

If a job 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.



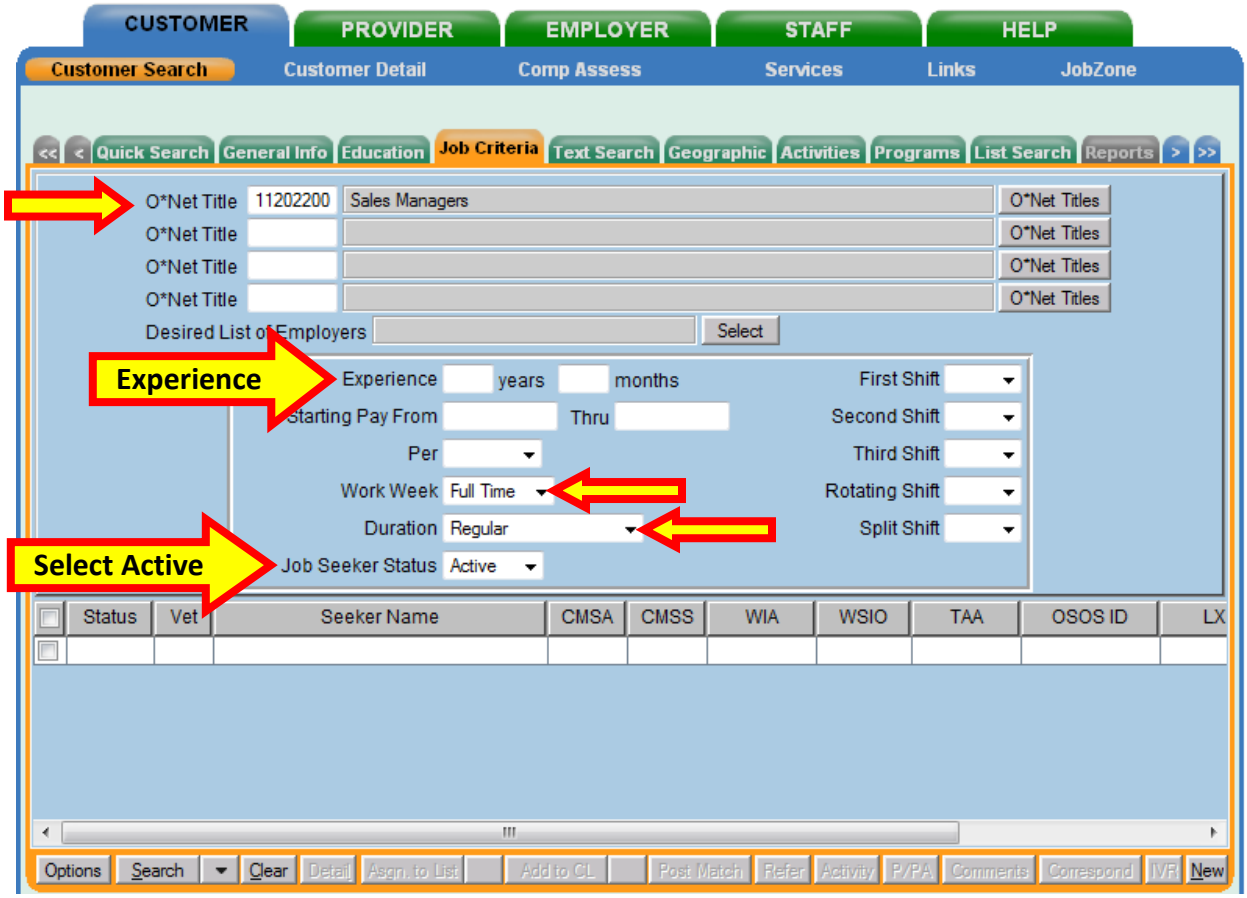
CUSTOMER SEARCH - JOB CRITERIA TAB

The **O*Net Title** and code, **Work Week**, and **Duration** data fields will automatically populate. Select "Active" in the **Job Seeker Status** drop down field.

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

Note: The four O*Net Title search function will provide results that include any of the titles searched.

If the job order specifies experience as a minimum qualification, staff should complete the **Experience** data field to match the desired work experience.

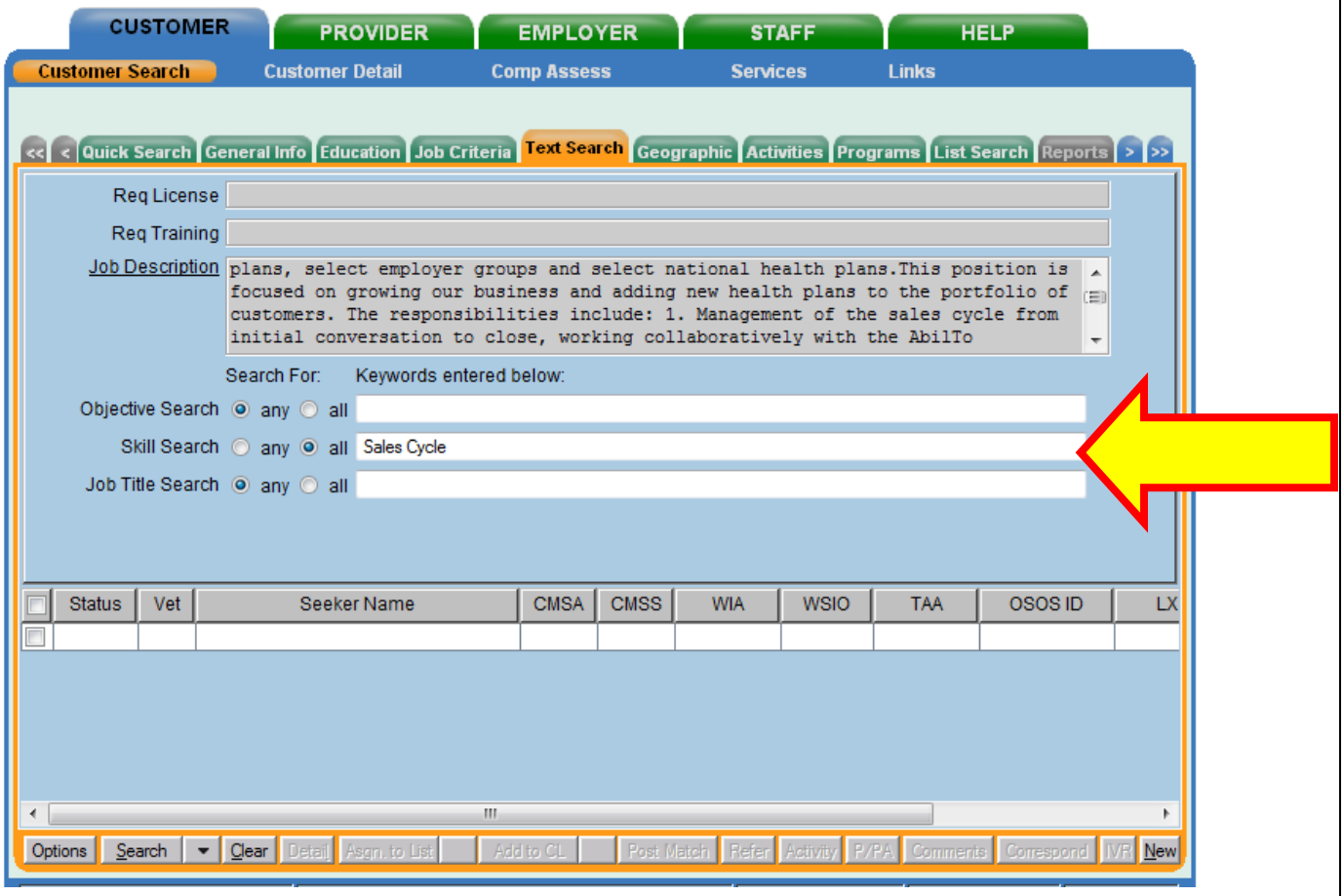


CUSTOMER SEARCH - TEXT SEARCH TAB

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

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

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

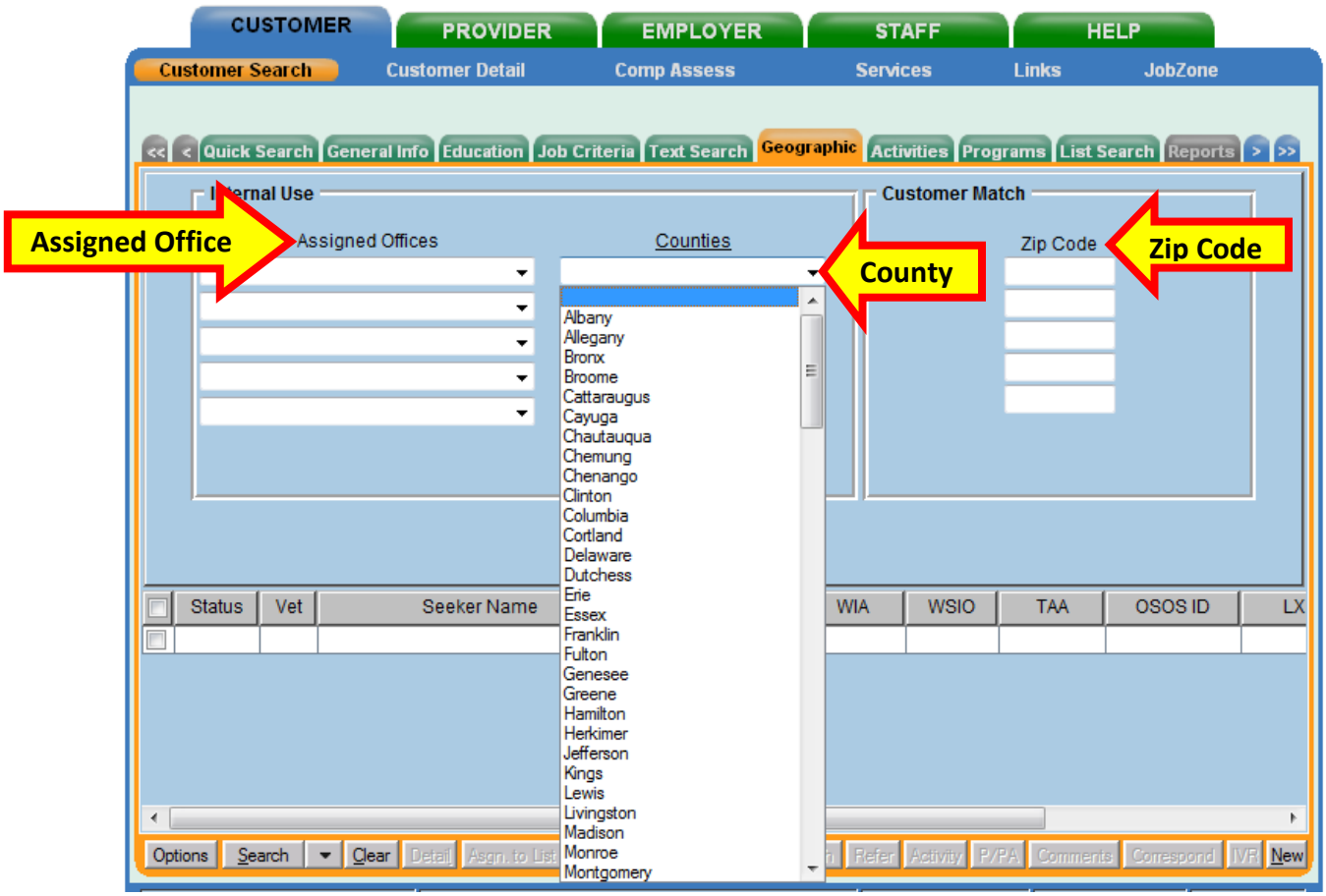


CUSTOMER SEARCH - GEOGRAPHIC TAB

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 for a recruitment, then matching by county will yield the best results (depending upon location).

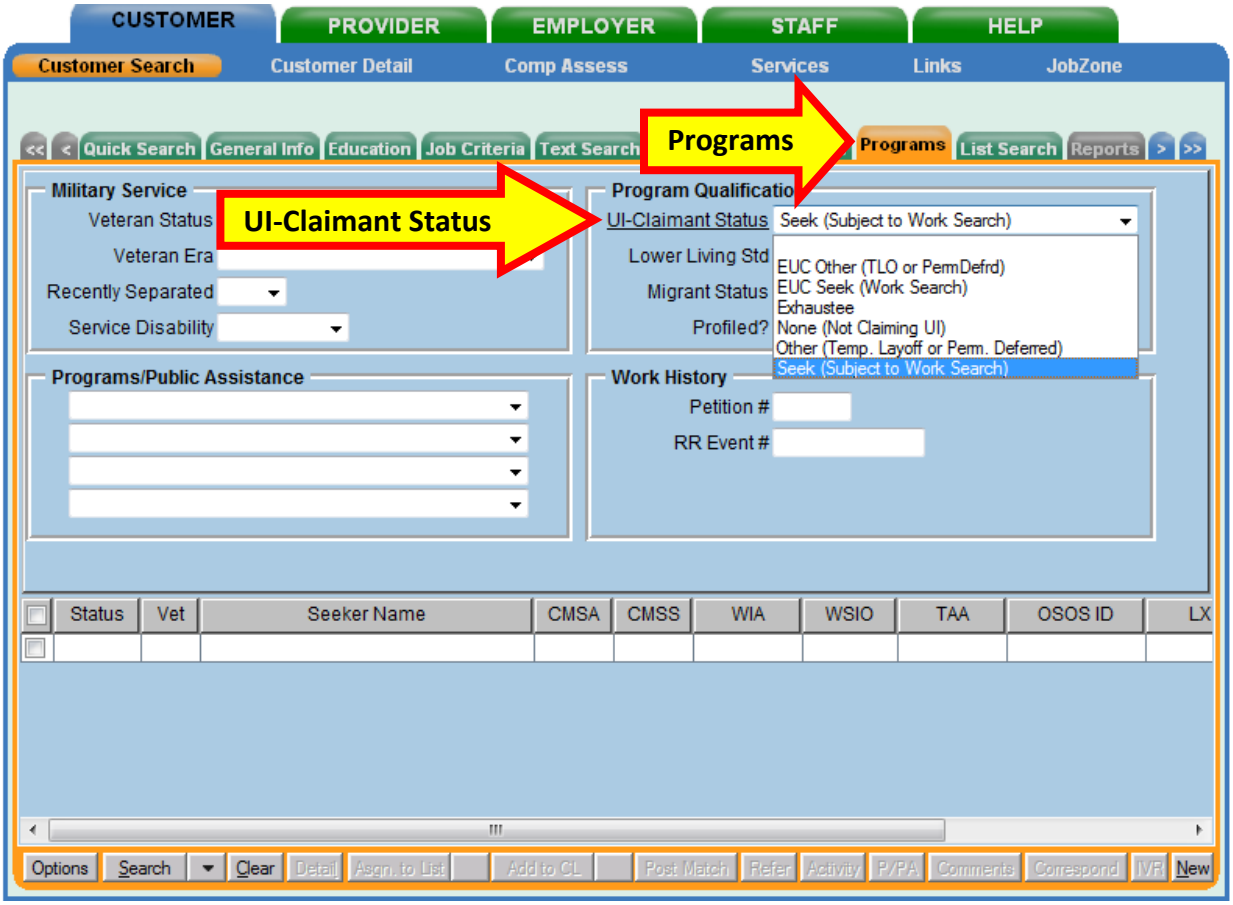
Searching by **Zip Code** is most effective when seeking results for a specific geographic target.



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.

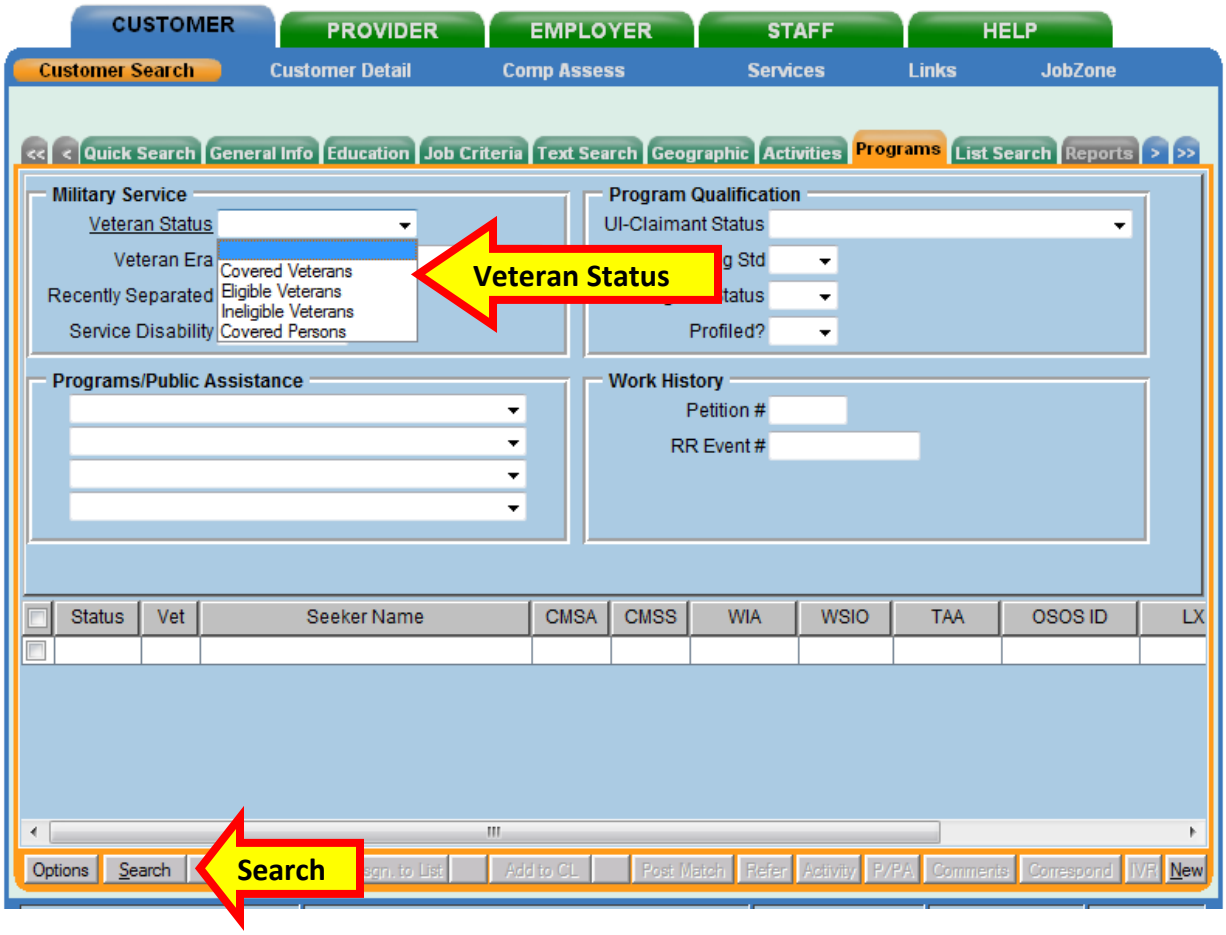
This field can be edited and/or left blank depending on the desired population.



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

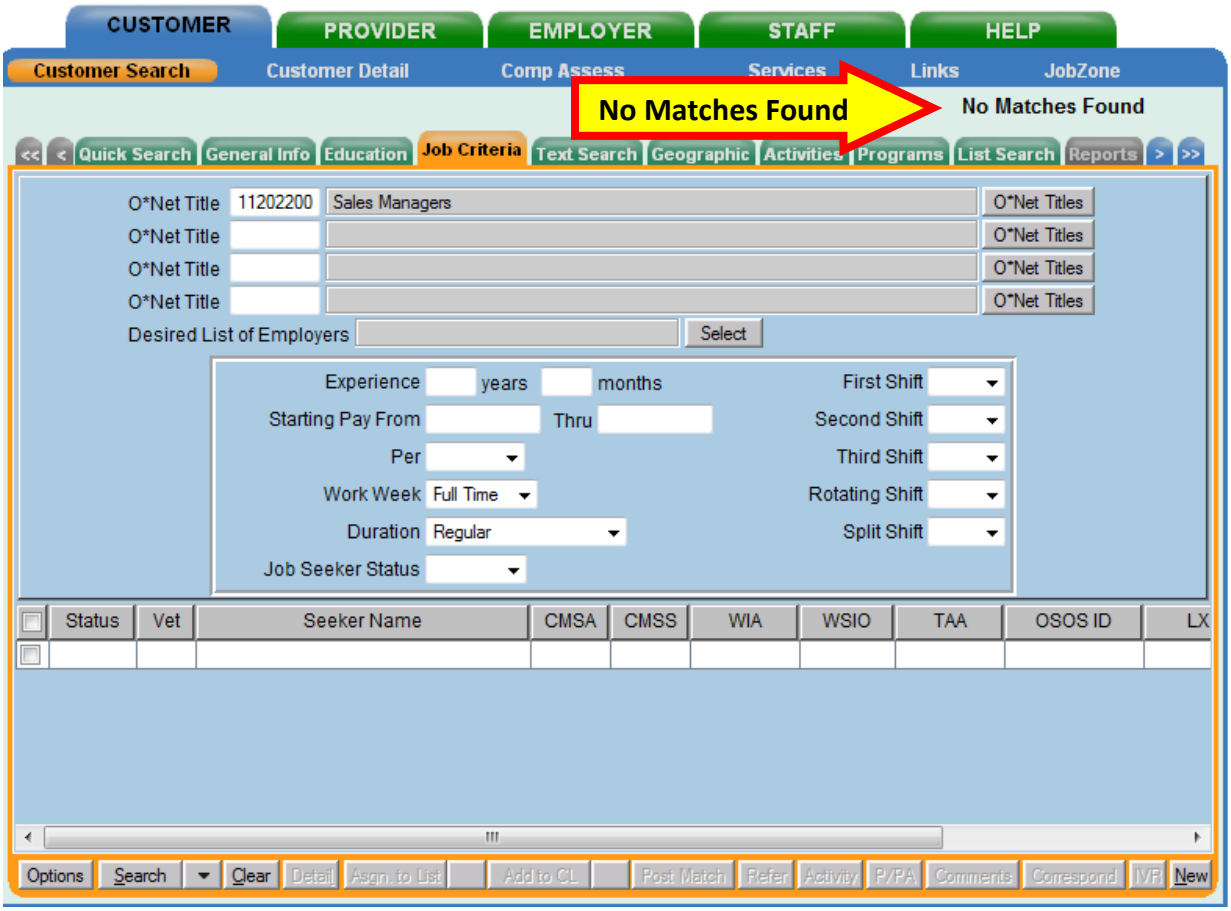
If a **Veteran Status** is not selected the veteran status will still be indicated in the search results with a “Yes” in the column labeled **Vet**.

After entering all search criteria click the **Search** button.



CUSTOMER SEARCH RESULTS: NO MATCHES

If a search results in "No Matches Found", the search criteria should be changed.



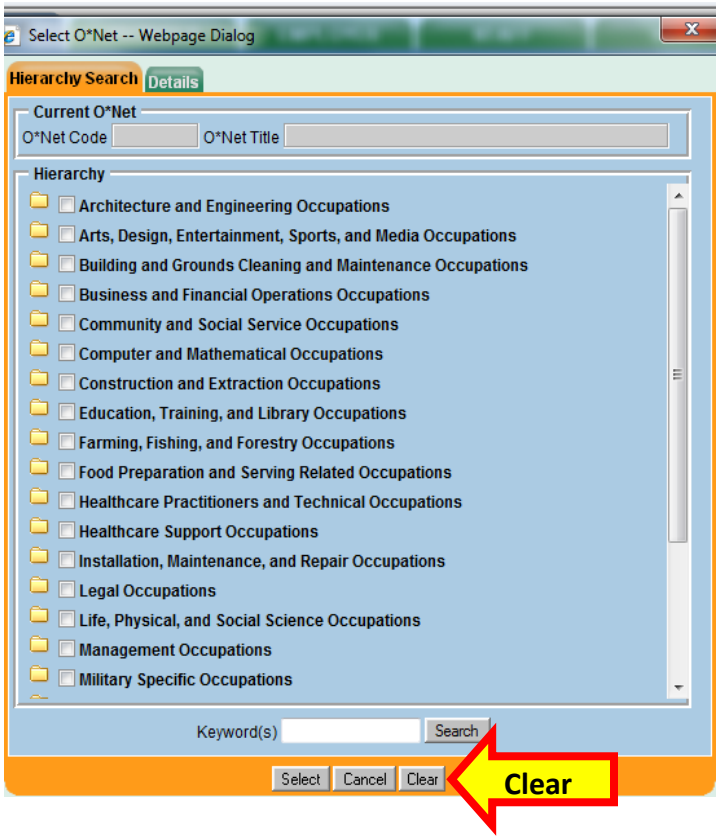
Removing the O*Net Title

If no matches are found there are several options to improve the results.

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 dialog box will appear. Click the **Clear** button.

Note: The O*Net Title was cleared by bringing up the O*Net dialog 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.



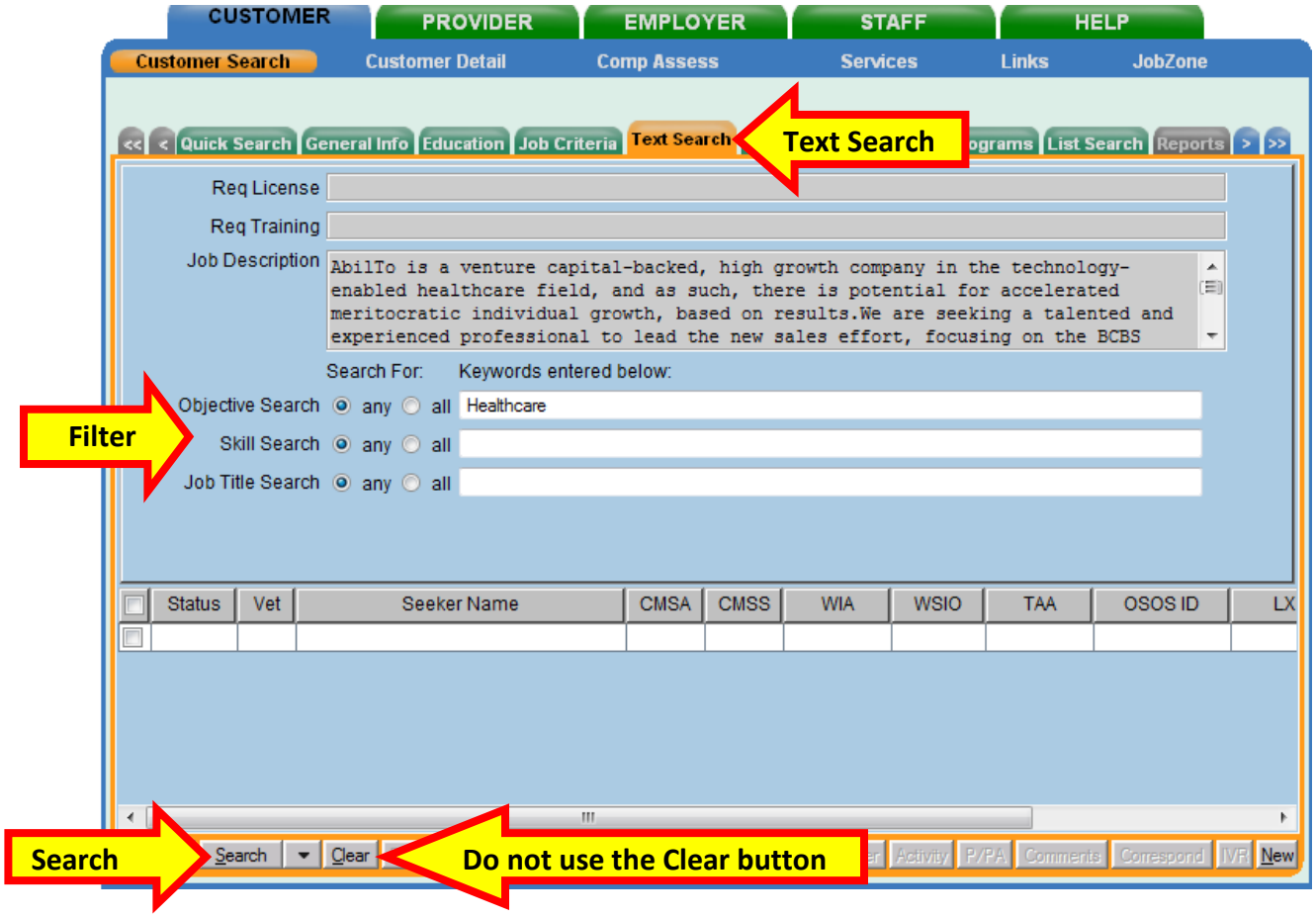
TEXT SEARCH TAB

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 the results. Click the **Search** button at the bottom of the screen to view the results.



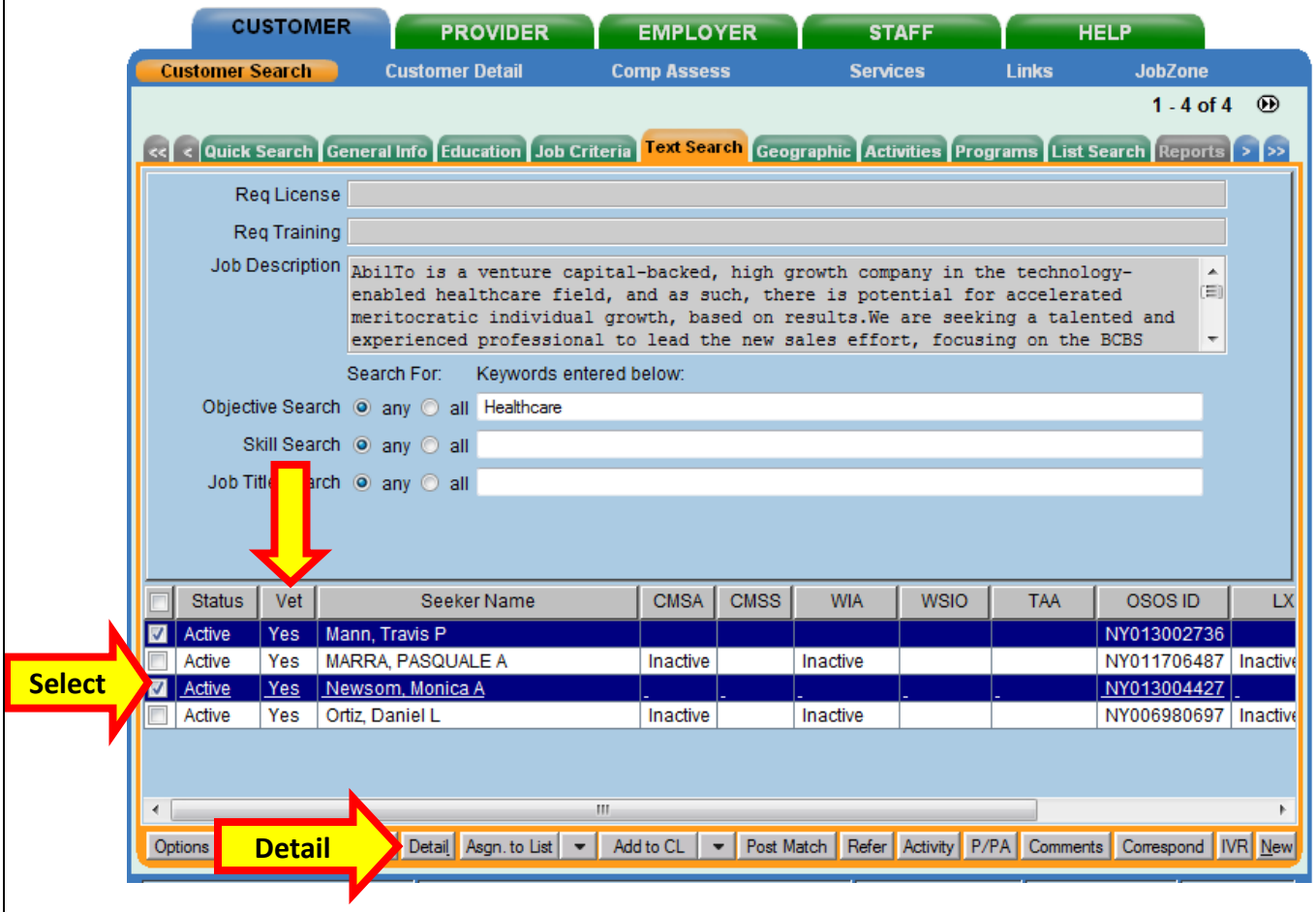
CUSTOMER SEARCH RESULTS

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

Any veteran customers matched to the job order appear in the **Vet** column reading "Yes". Sorting for veterans can be done 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 in the grey title bar.

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



NAVIGATING BETWEEN THE CUSTOMER AND EMPLOYER MODULES

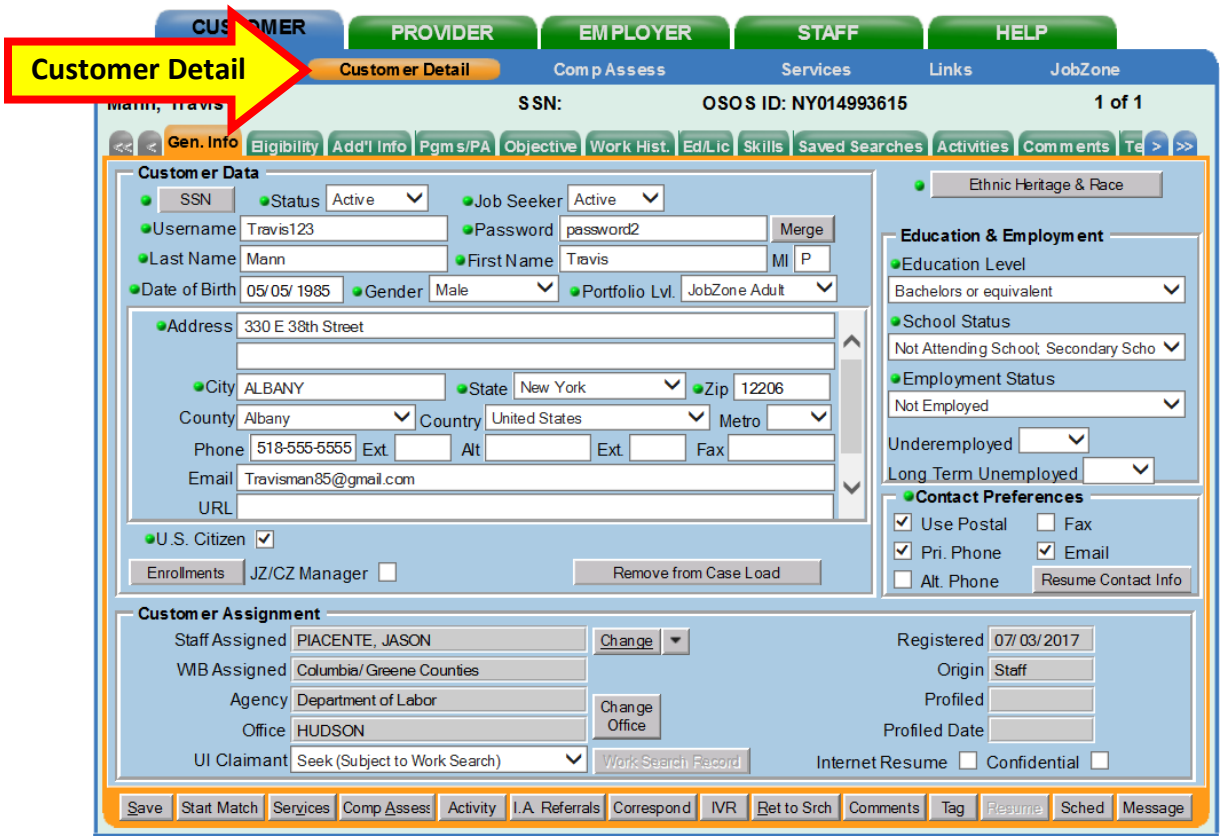
Navigate between the **Customer Module** and **Employer Module** in the Match Mode Process to compare the job order information with the customer information.

As a best practice, print the job order to reference and highlight the requirements of the position for easy comparison.

REVIEWING POSSIBLE MATCHES

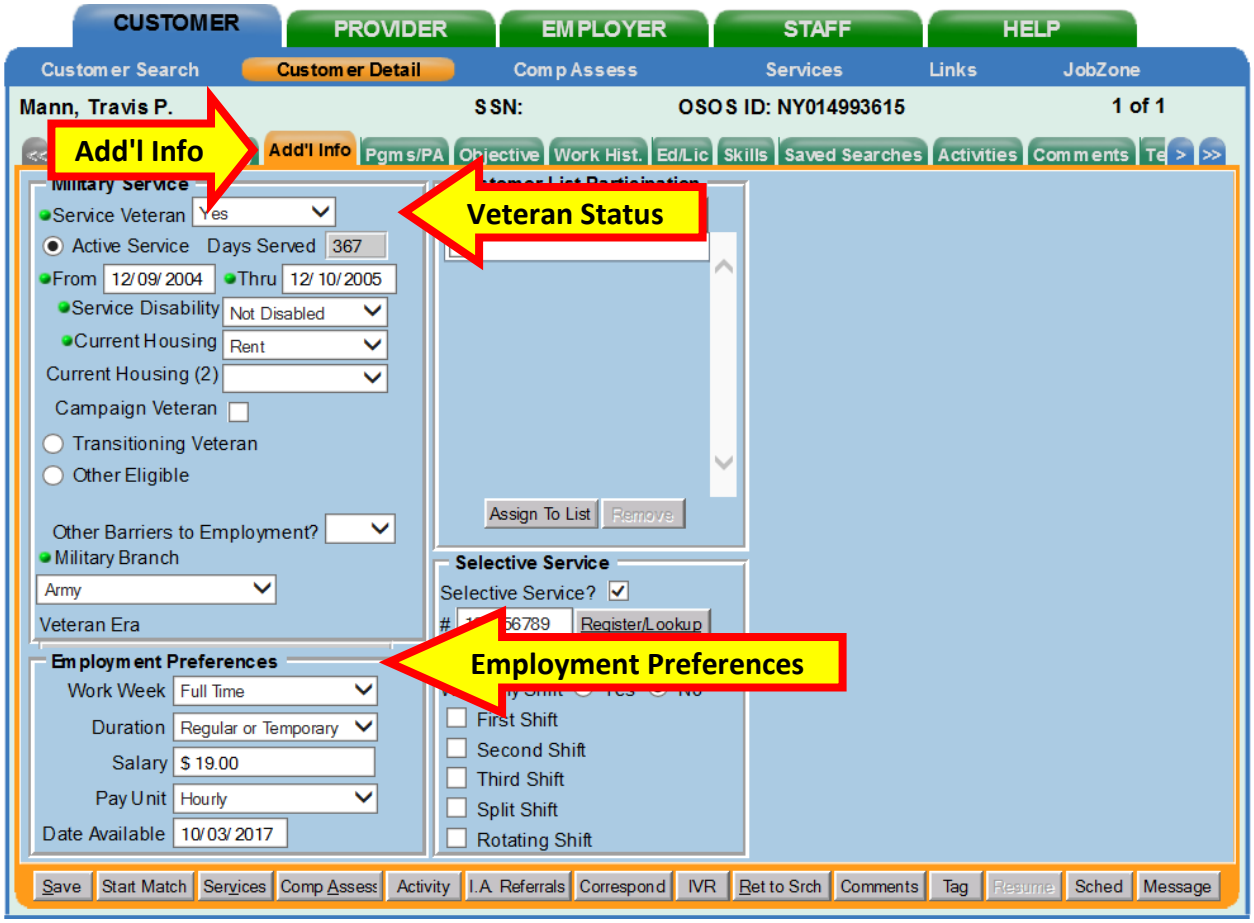
To ensure quality job matching, staff are required to compare specific information between open job orders and customer records. When reviewing the customer record items such as objective, work history, skill/abilities, education/licenses, and the **Comments** tab of OSOS need to be reviewed to confirm a good match with the business' needs/requirements.

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



ADD'L INFO TAB

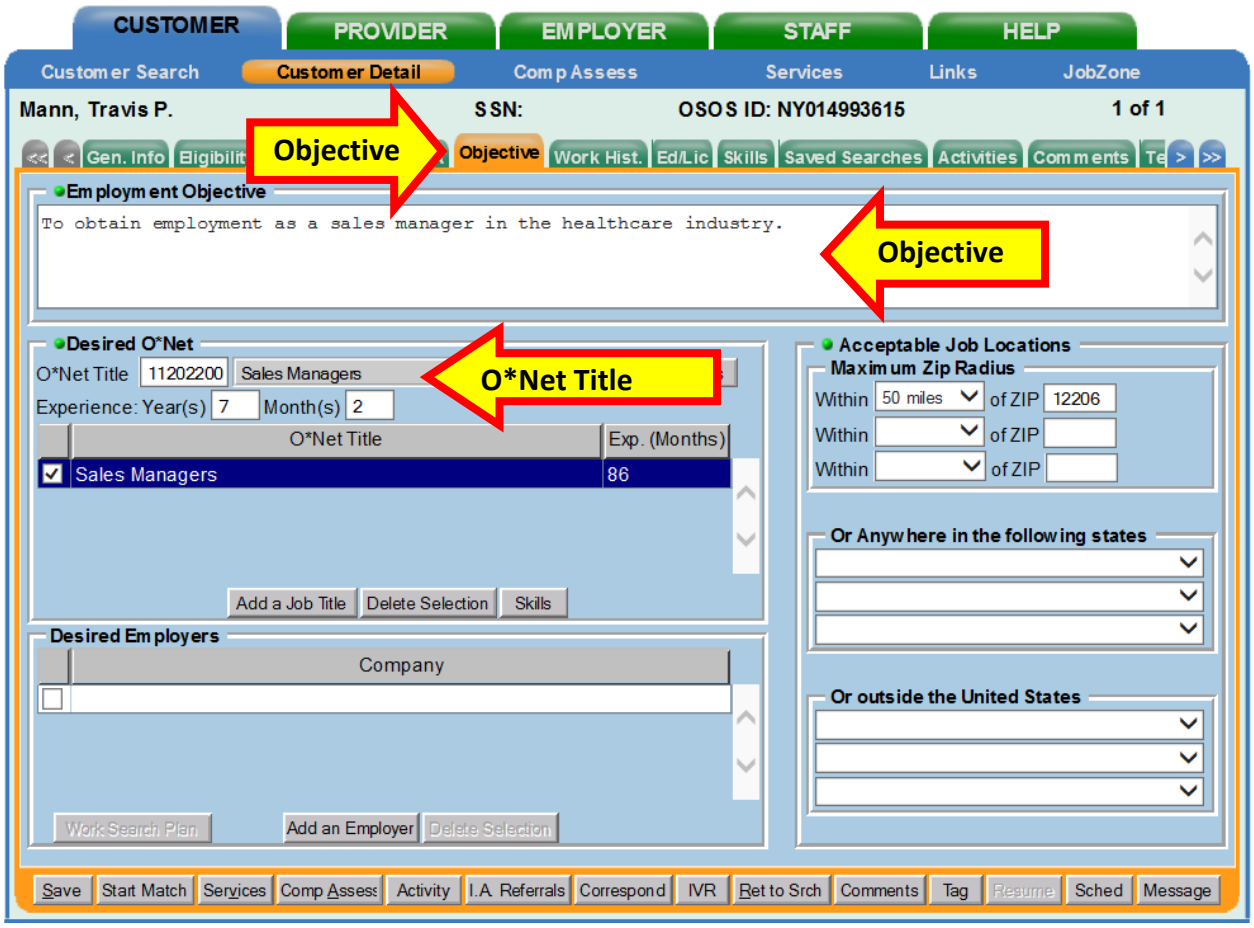
View the **Add'l Info** tab to review the customer's **Employment Preferences** and veteran status.



OBJECTIVE TAB

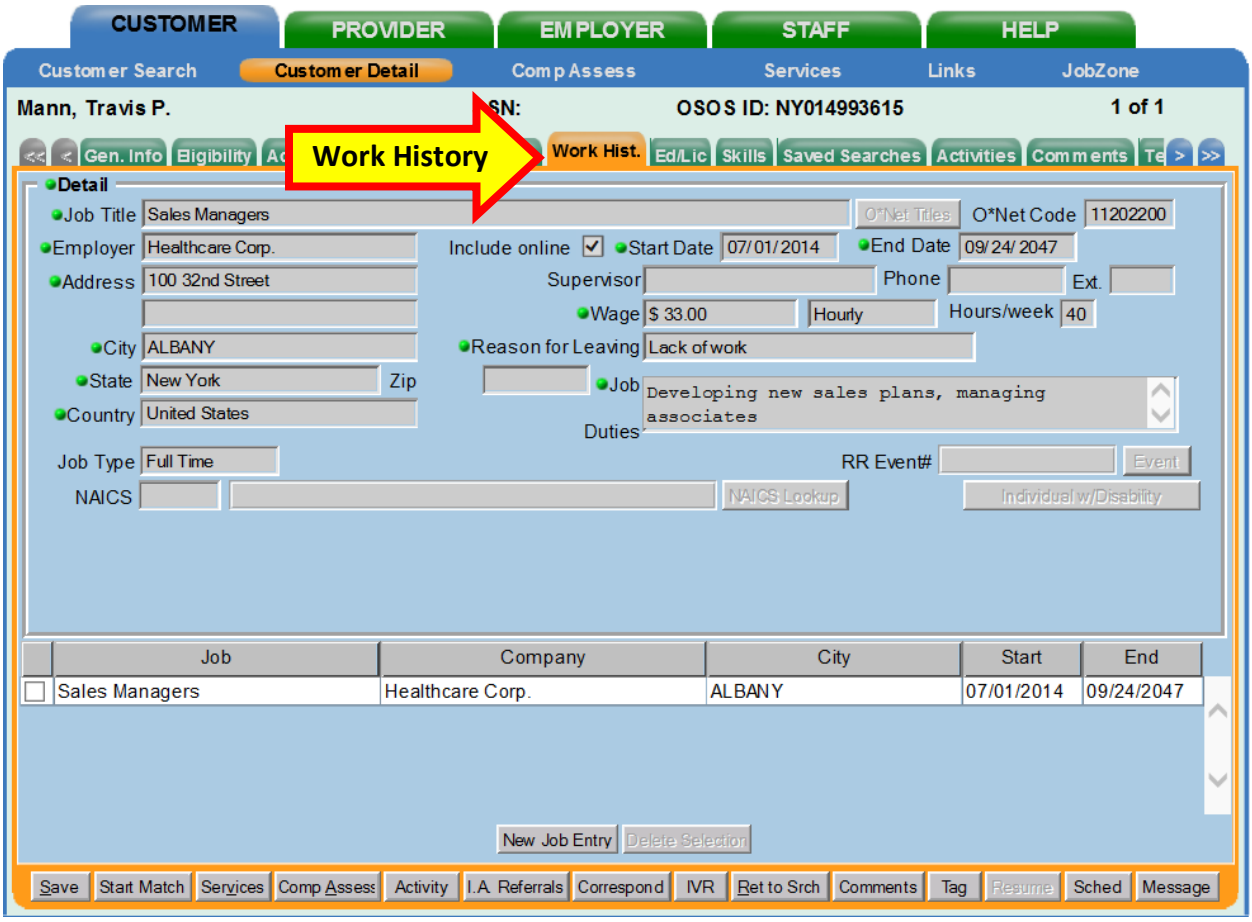
Within the **Objective** tab, review the customer's **Desired O*Net** Title and **Employment Objective**.

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



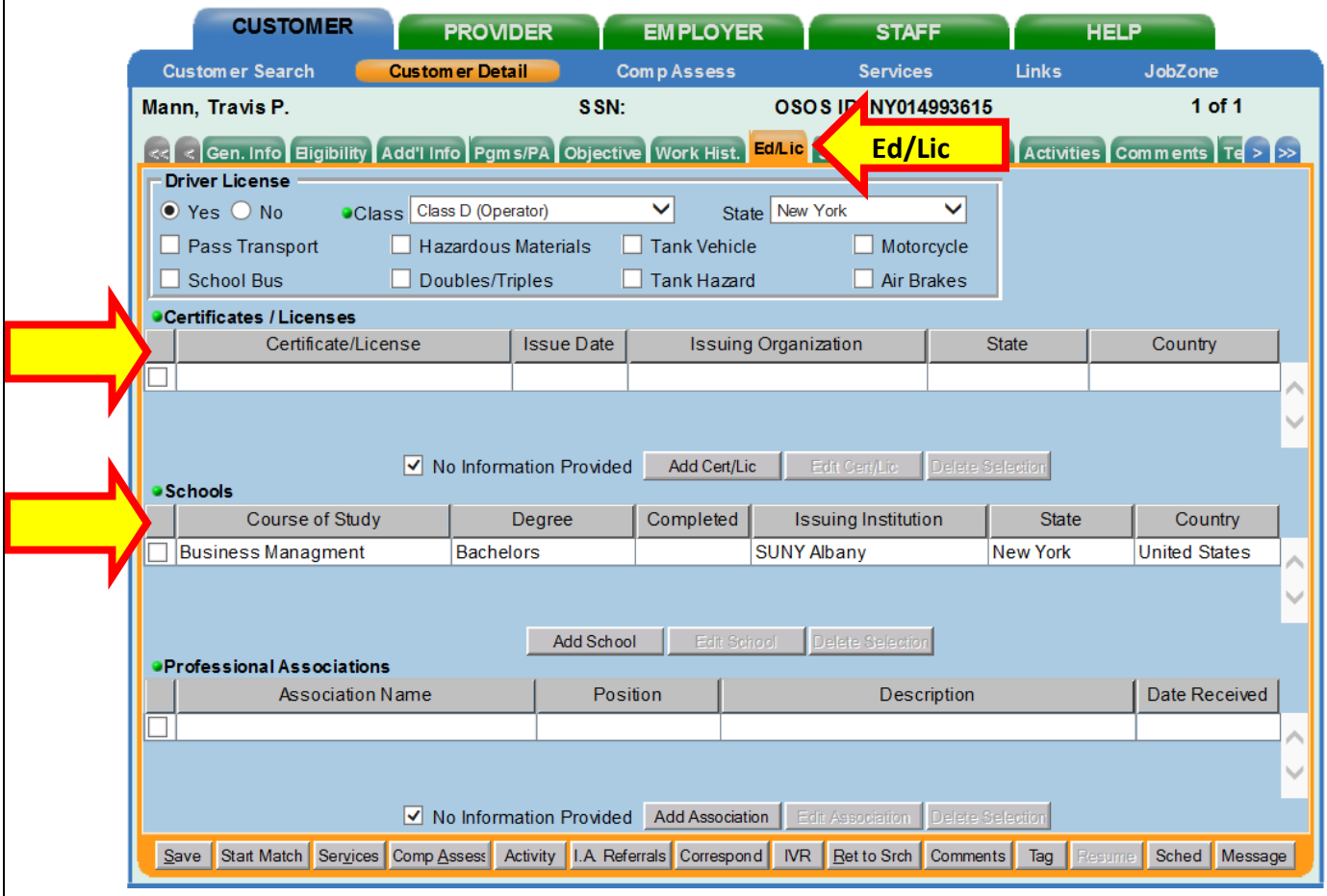
WORK HISTORY TAB

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



EDUCATION/LICENSE TAB

If the job order requires a certain license, certificate, or degree, check the **Education/License** tab to review the customer's credentials.

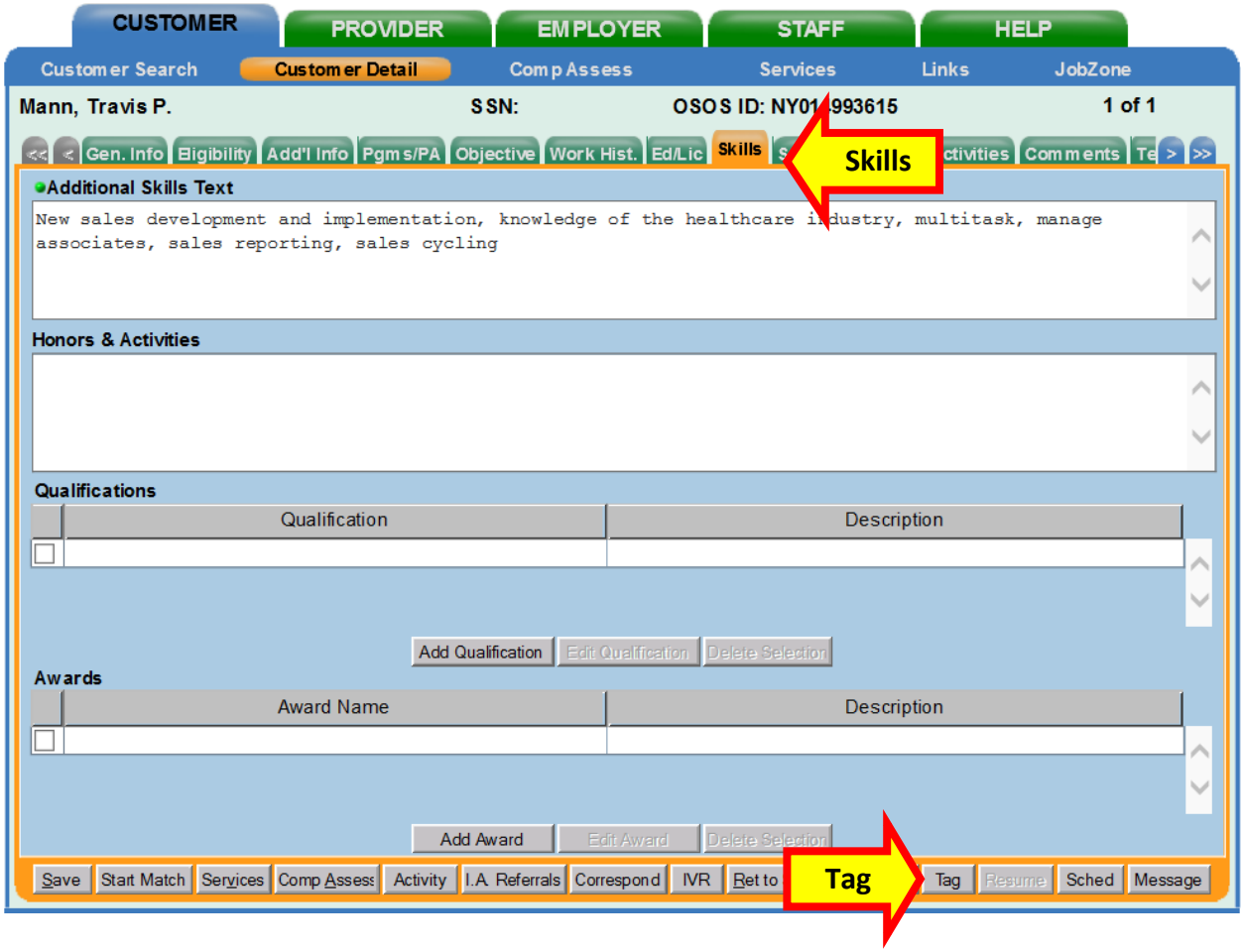


SKILLS TAB

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.

As a best practice, **Tag** the records while toggling through them.

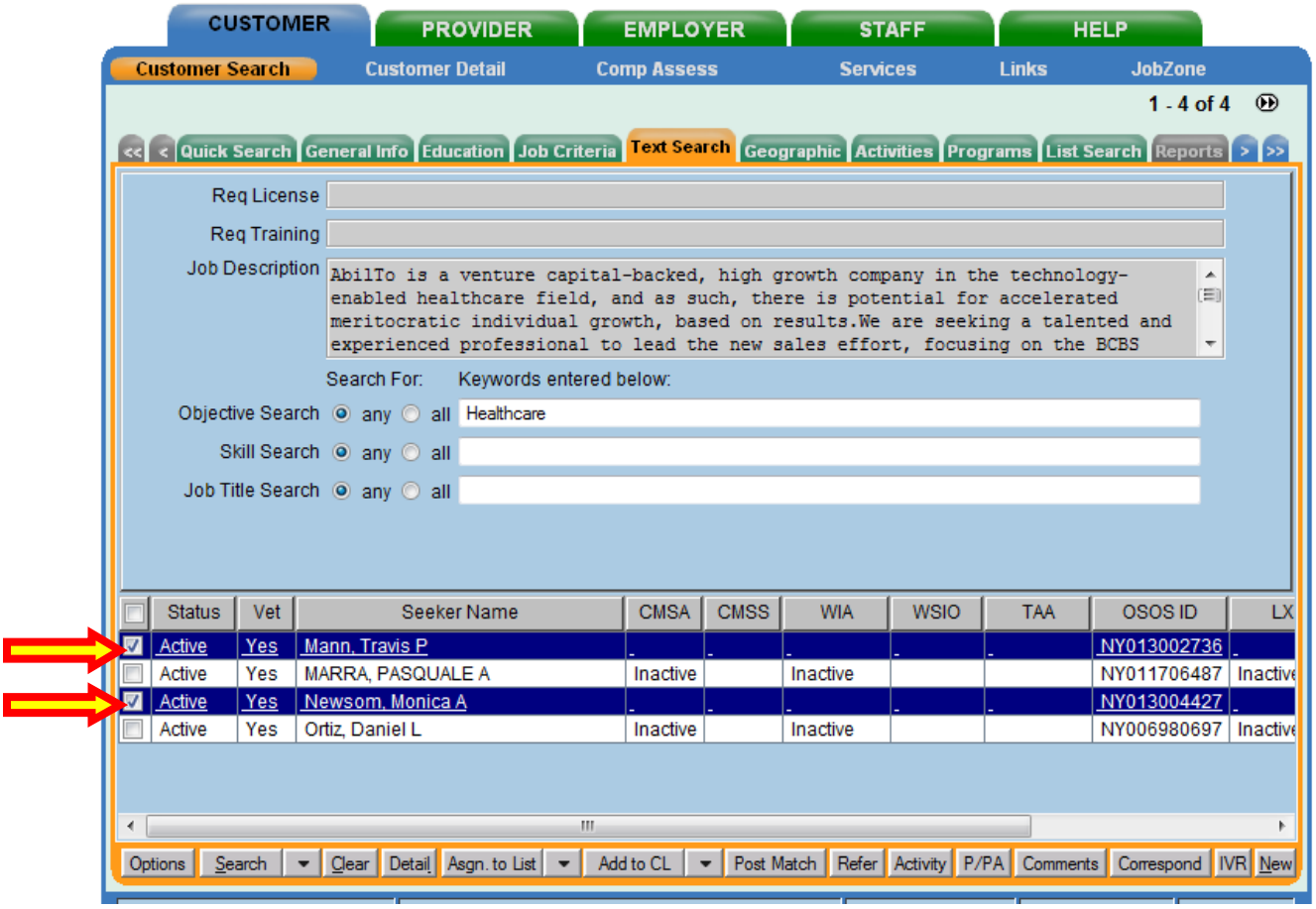


RETURN TO SEARCH LISTING

After all the selected customer records have been reviewed in the **Customer Detail** window, click the **Return to Search** button at the bottom of the screen.

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

The customer records that were tagged will be highlighted.

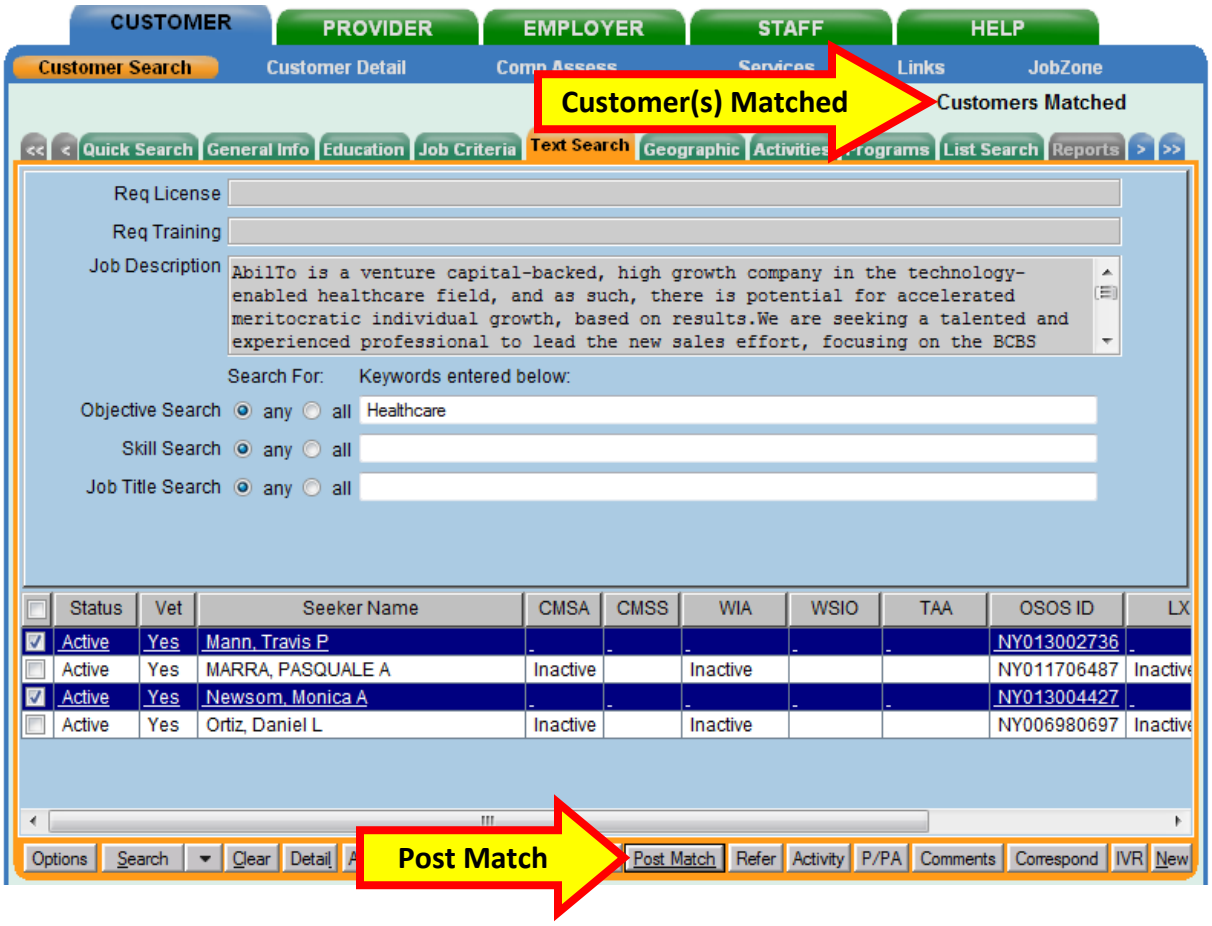


POSTING THE MATCH

Once the customers are tagged and highlighted, click 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 to confirm the match was posted.

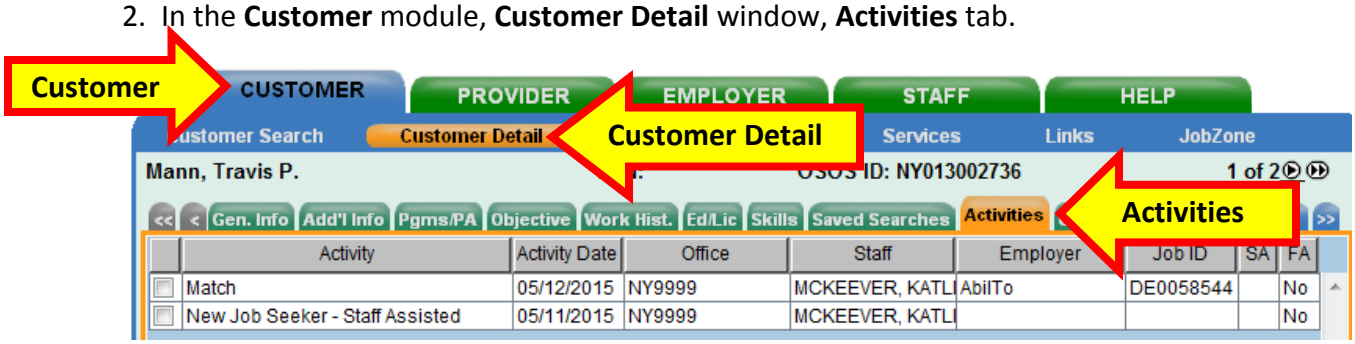
After the **Post Match** button is clicked, the Match Mode Process is exited.



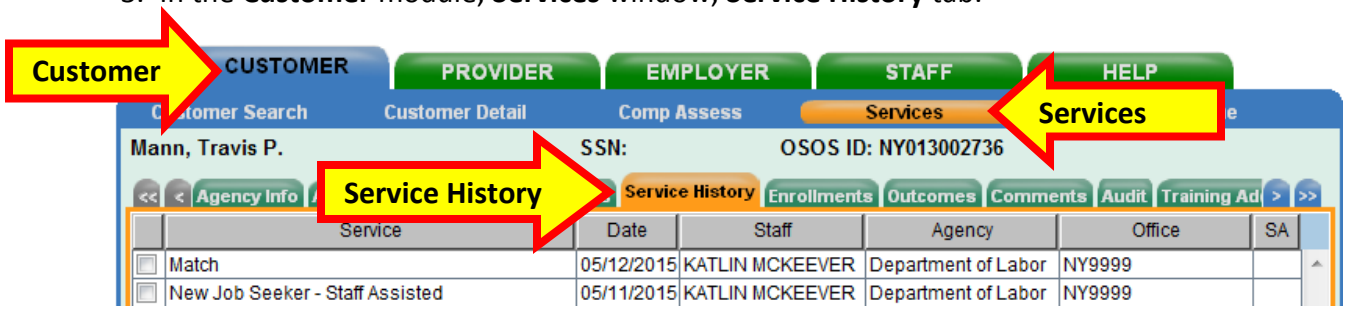
After a customer(s) has been matched to a job order, the match will automatically show in three places in OSOS:

1. In the **Employer** module, **Job Order Detail** window, **Matches** tab.

2. In the **Customer** module, **Customer Detail** window, **Activities** tab.



3. In the **Customer** module, **Services** window, **Service History** tab.



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

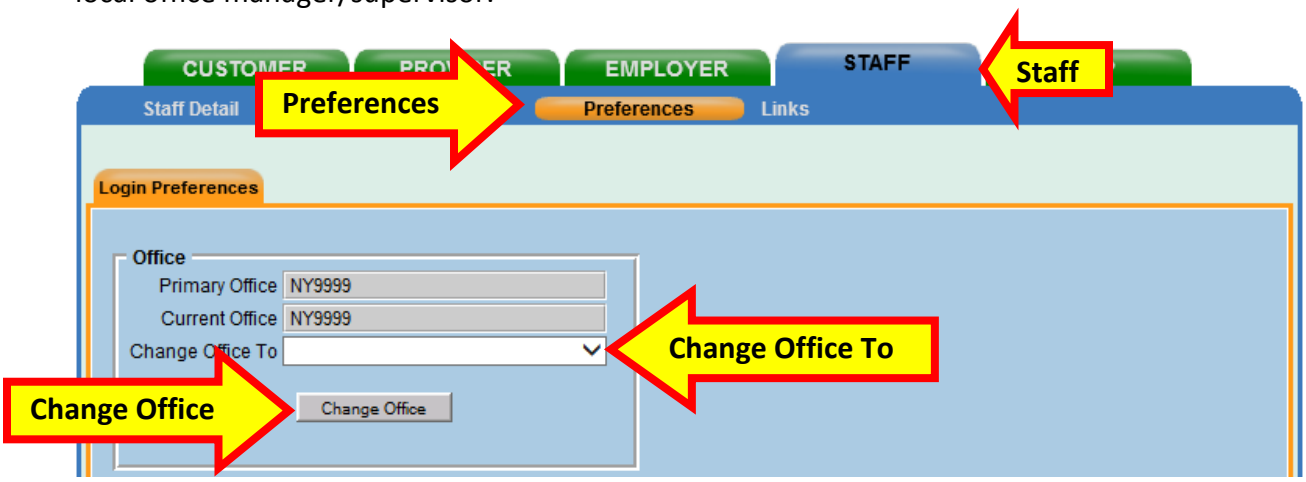
As a best practice, staff should notify the LVER when a match has been made to a veteran customer so that she/he can follow up with the customer to provide additional assistance.

ADDING REFERRALS

A referral service matches the customer's talents to the specific hiring needs of a business. To ensure quality job referrals, staff should refer customers only when appropriate job qualifications are met.

A referral is a service to the customer that will create or extend an enrollment. **Staff will post referrals in OSOS only when a customer has indicated they have applied to the position**.

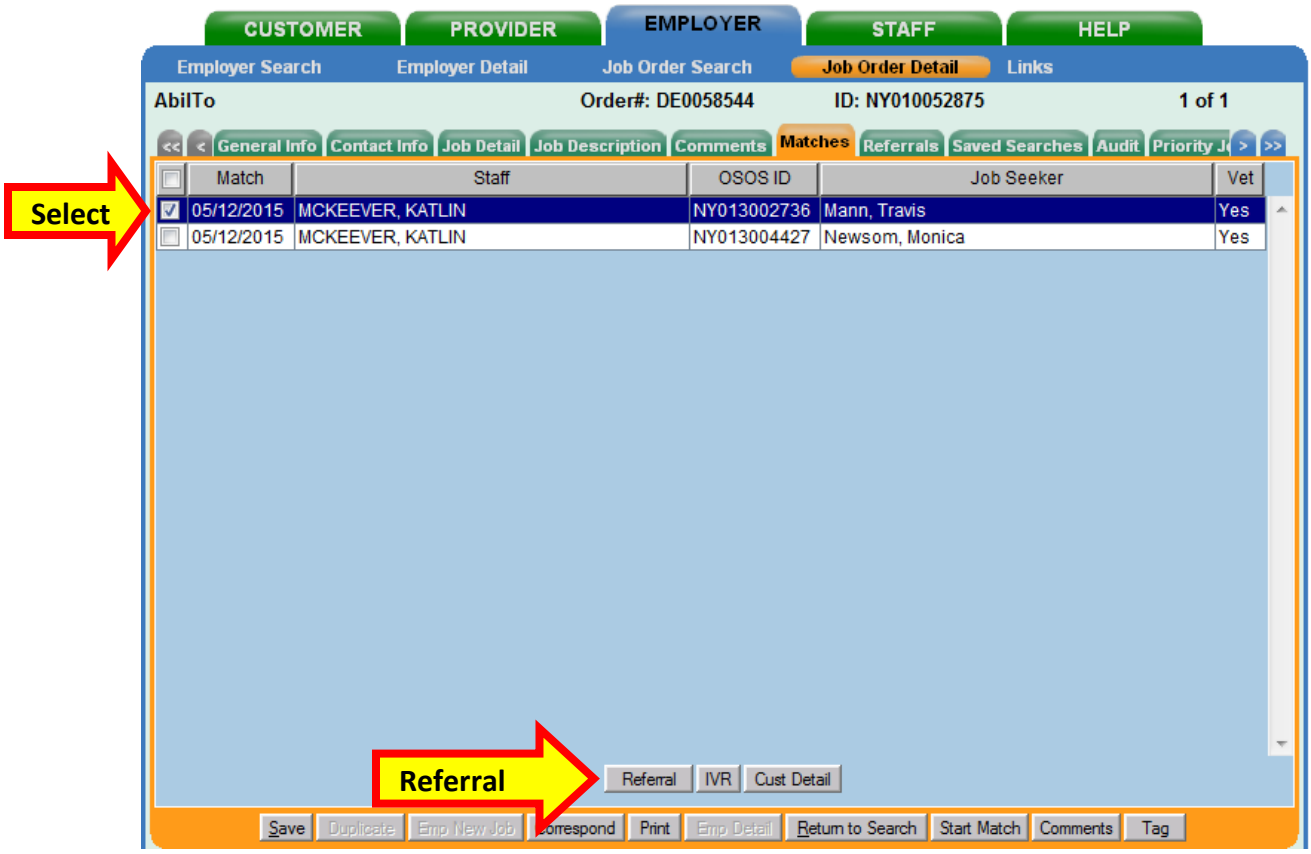
When making a referral, staff must be logged into the same office the customer is assigned to (i.e. a Troy customer will need to be referred under the Troy office). To change offices, select the **Staff** module, then the **Preferences** window. In the **Office** section, select the desired office from the **Change Office To** drop-down menu and click the **Change Office** button. To request access for multiple offices, staff must contact their local office manager/supervisor.



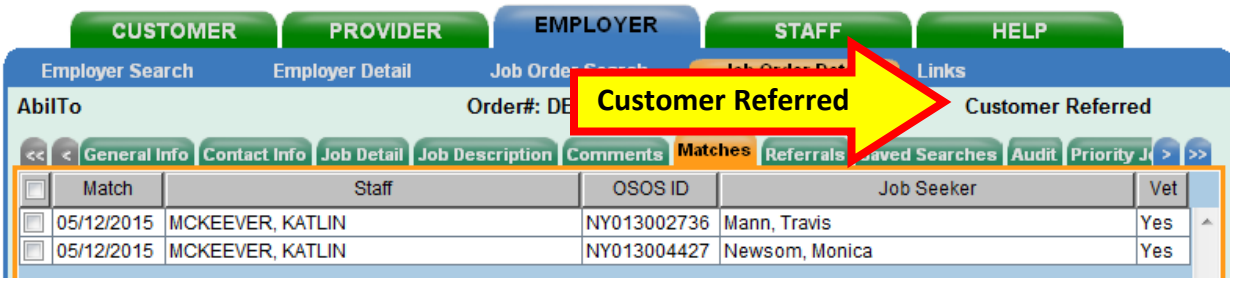
FROM THE EMPLOYER MODULE MATCHES TAB

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

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

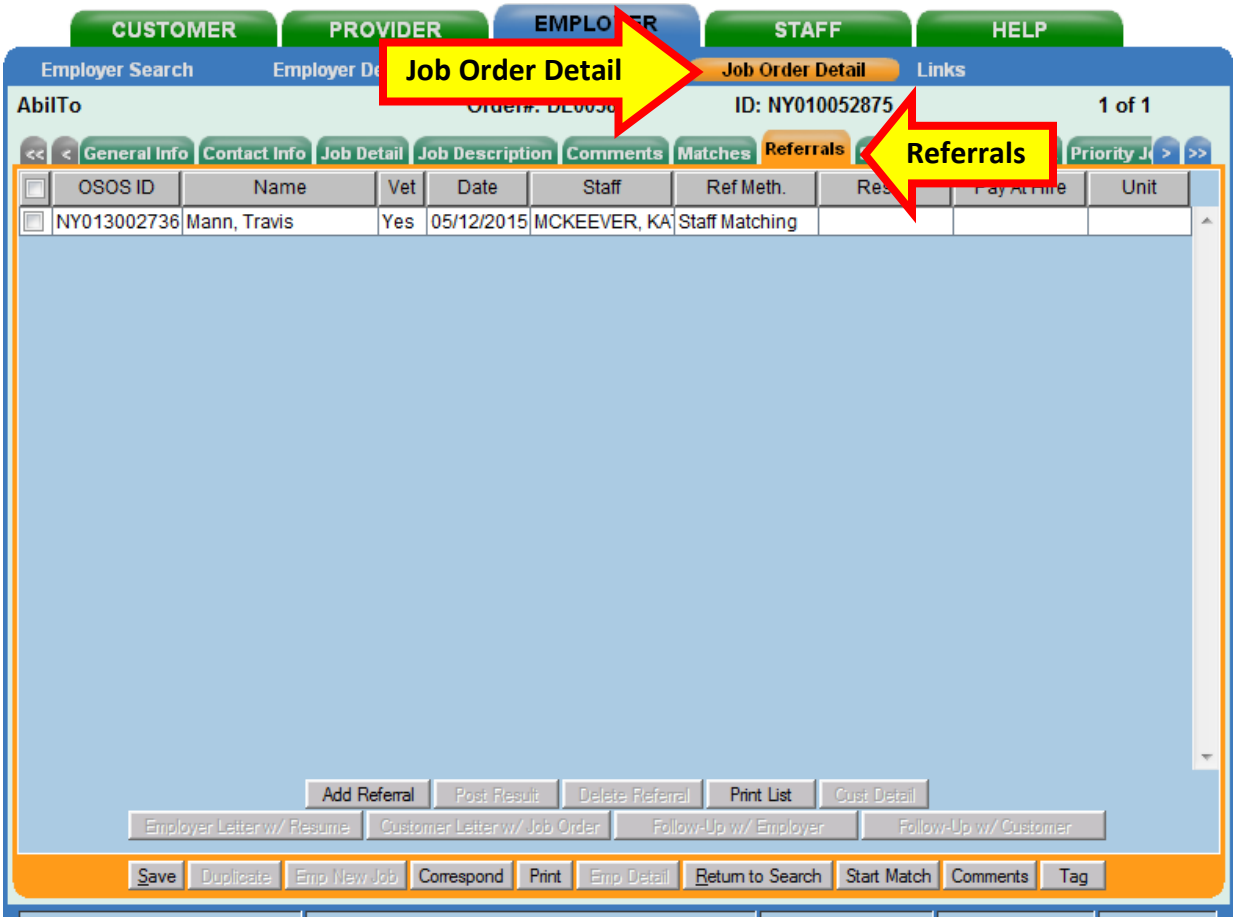


A "Customer Referred" message will appear briefly in the upper right of the window and the customer will be posted on the **Referrals** tab**.**



FROM THE EMPLOYER MODULE REFERRALS TAB

The referral is posted to the **Employer** module, **Job Order Detail** window, **Referrals** tab**.**



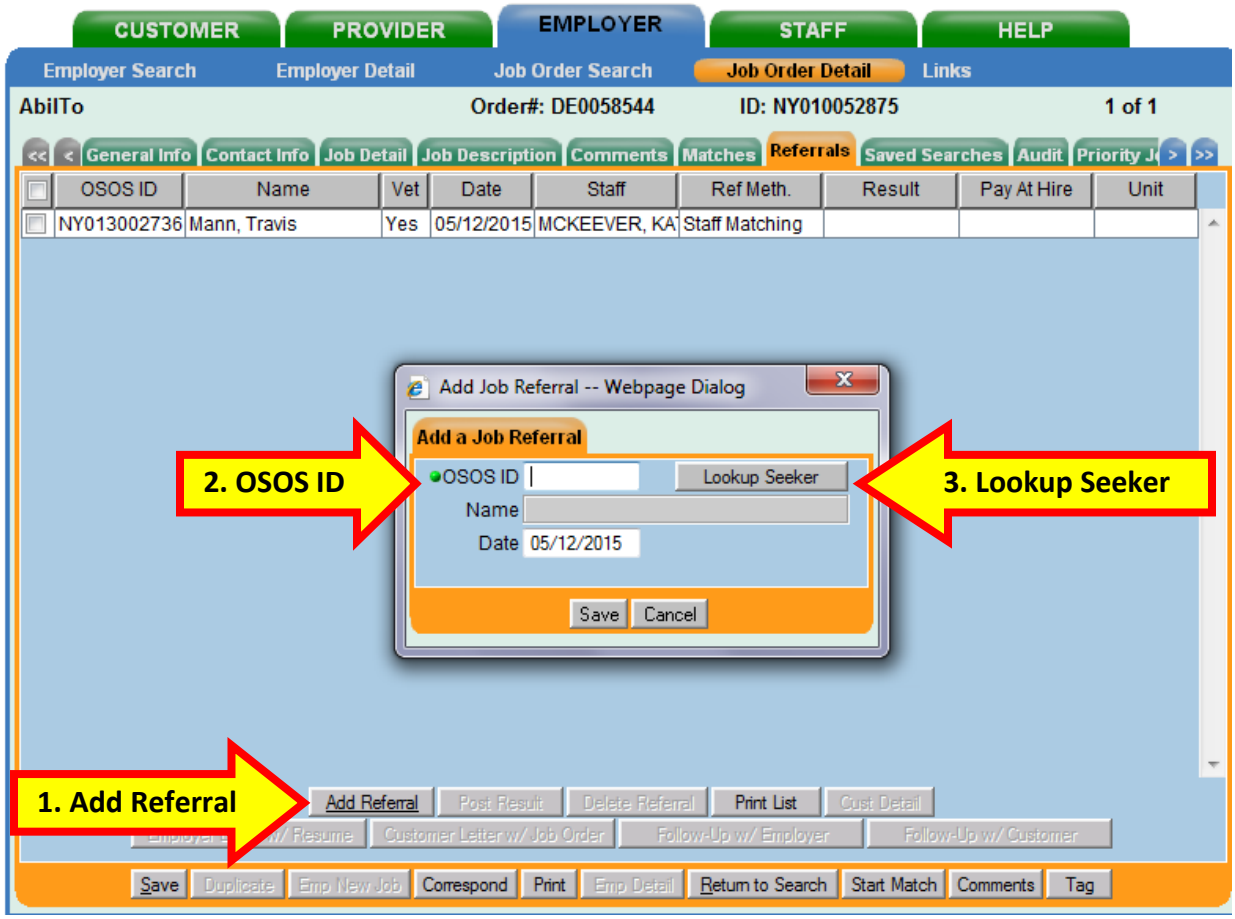
Adding a Direct Referral

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

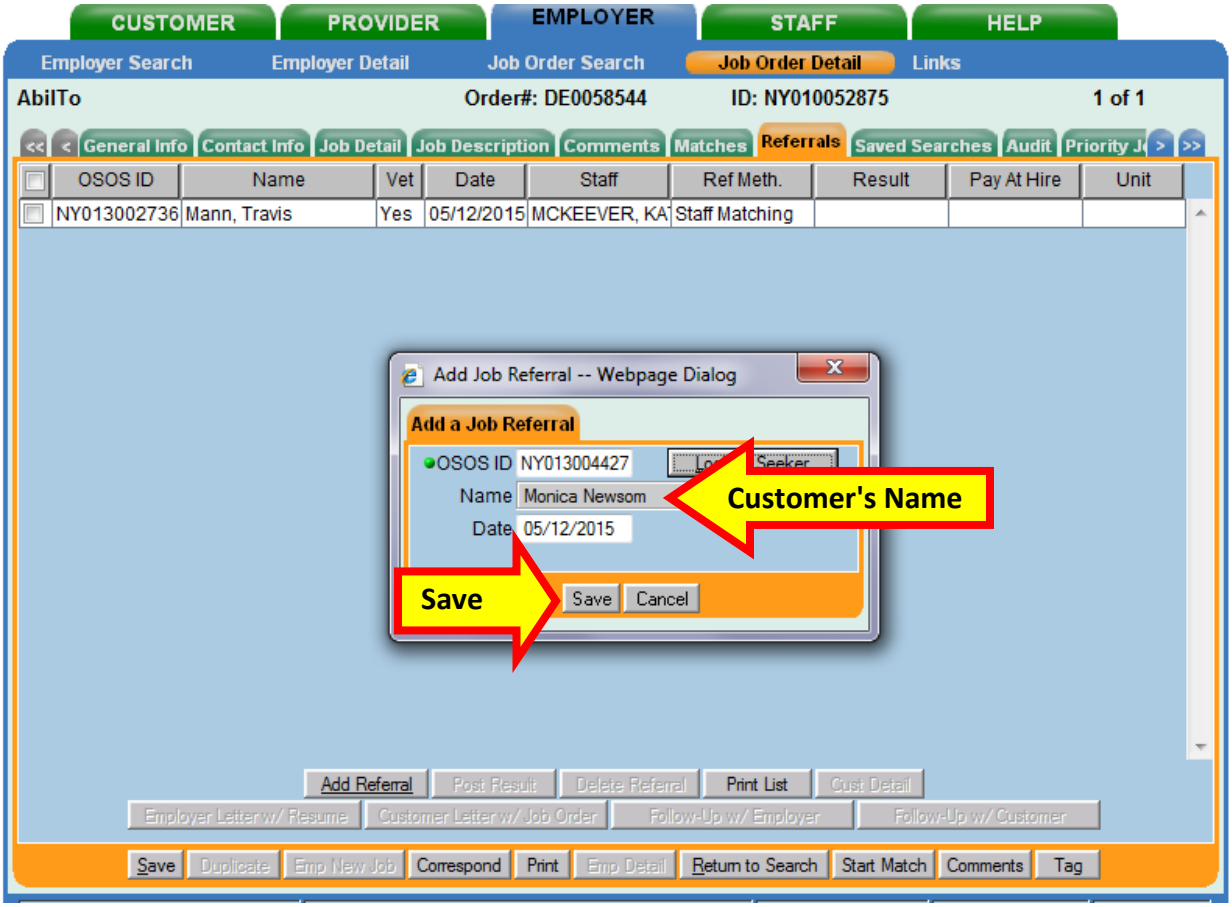
A direct referral is often done when staff is working with the customer in person and the customer has confirmed that they intend to apply to the job.

Click the **Add Referral** button in this tab. The date data field populates automatically.

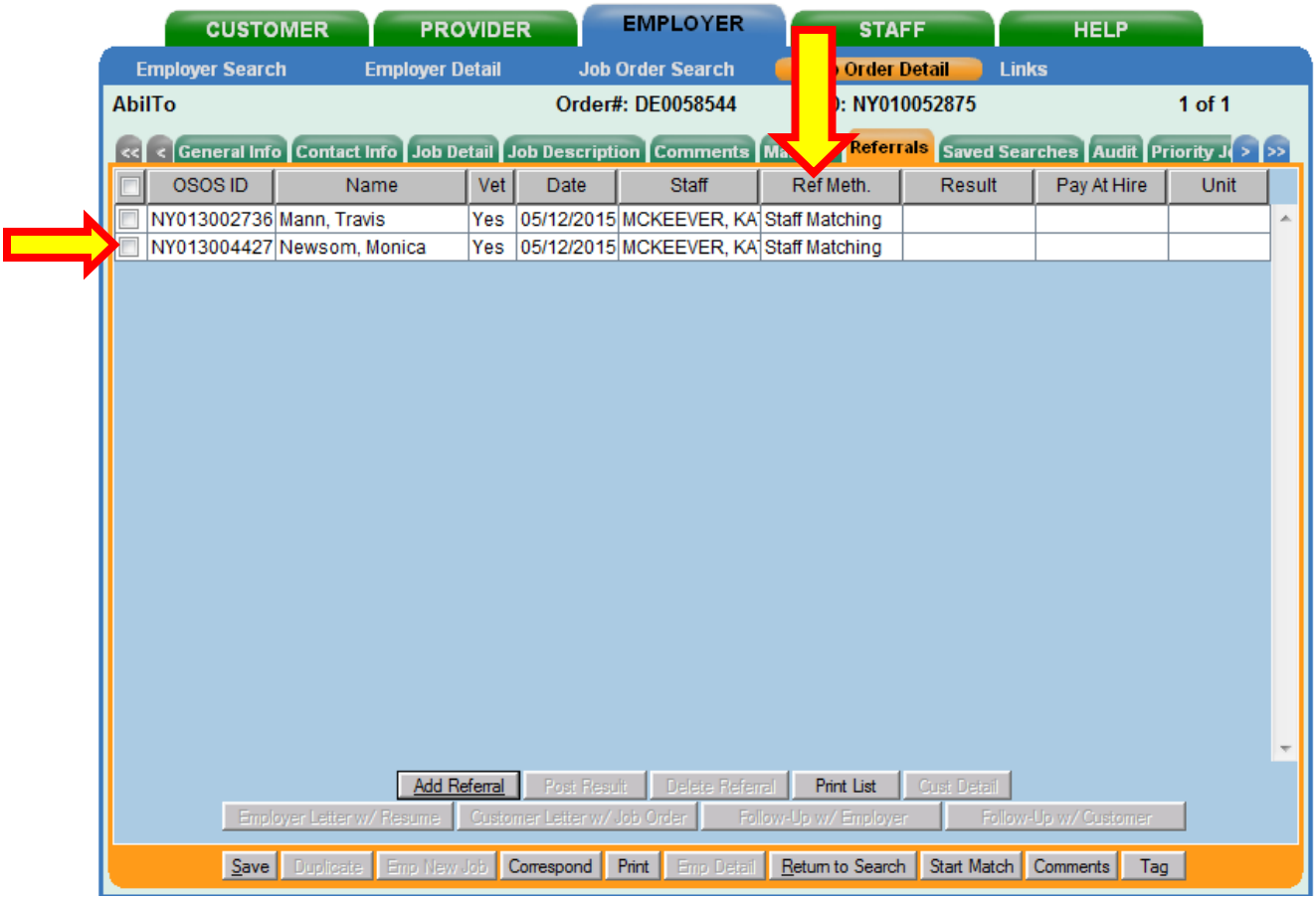
Enter the customer's **OSOS ID** number in the Add Job Referral dialog box and click the **Lookup Seeker** button**.**



The customer's name will appear in the dialog box. Click the **Save** button.

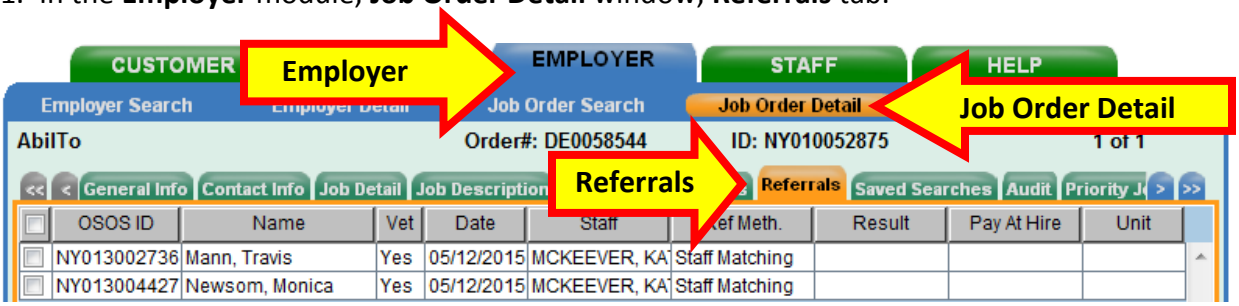


The customer will be added as a referral.

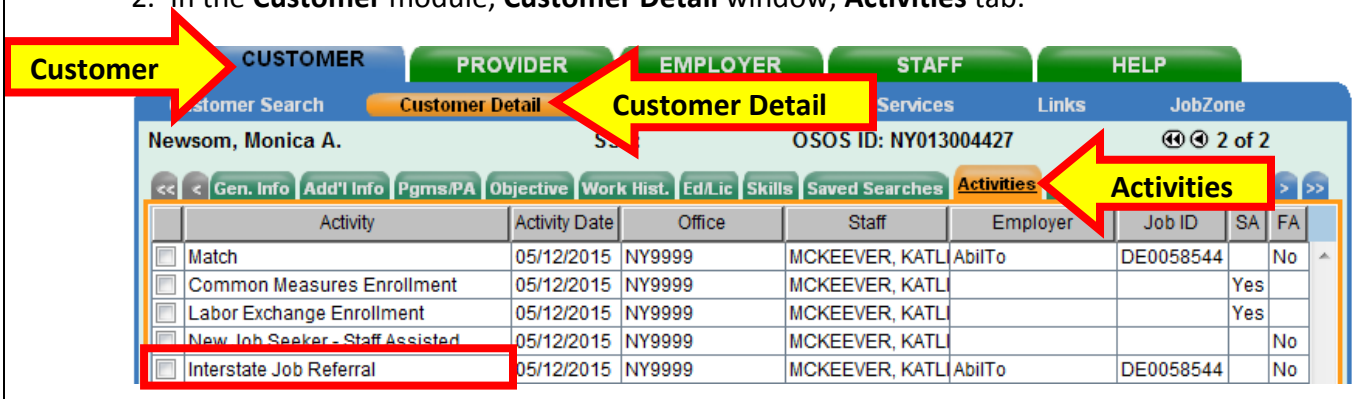


After the referral is saved it will be recorded in 3 locations in OSOS.

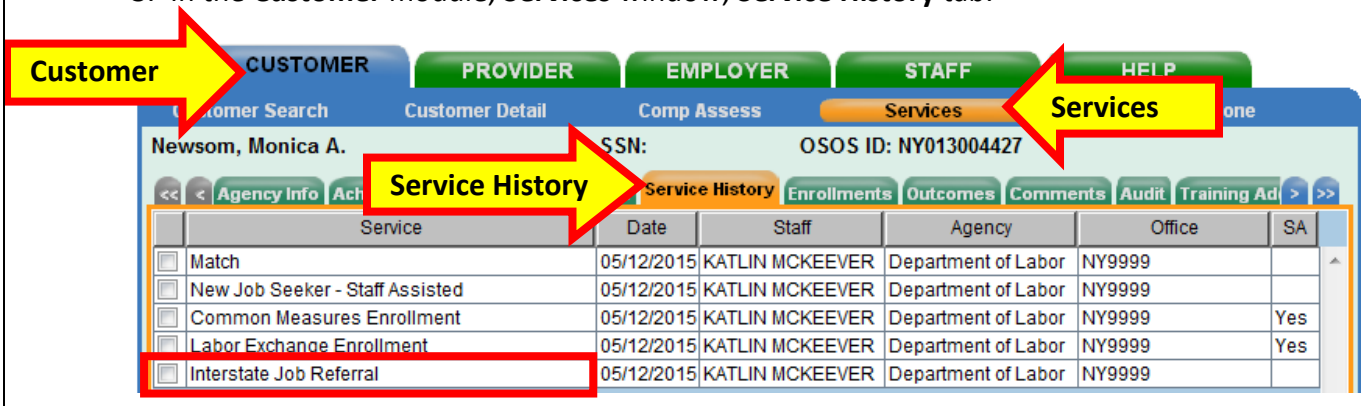
1. In the **Employer** module, **Job Order Detail** window, **Referrals** tab.



2. In the **Customer** module, **Customer Detail** window, **Activities** tab.



3. In the **Customer** module, **Services** window, **Service History** tab.



As a best practice, staff should notify the LVER when a referral has been added for a veteran customer so that she/he can follow up with the business to provide additional services.

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