Employer Search and New Business Jacket OSOS Guide

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PURPOSE

This guide is intended to help staff understand the basics of how to perform an Employer Search and create a New Business Jacket.

It's important to do a thorough search so duplicate records are not created.

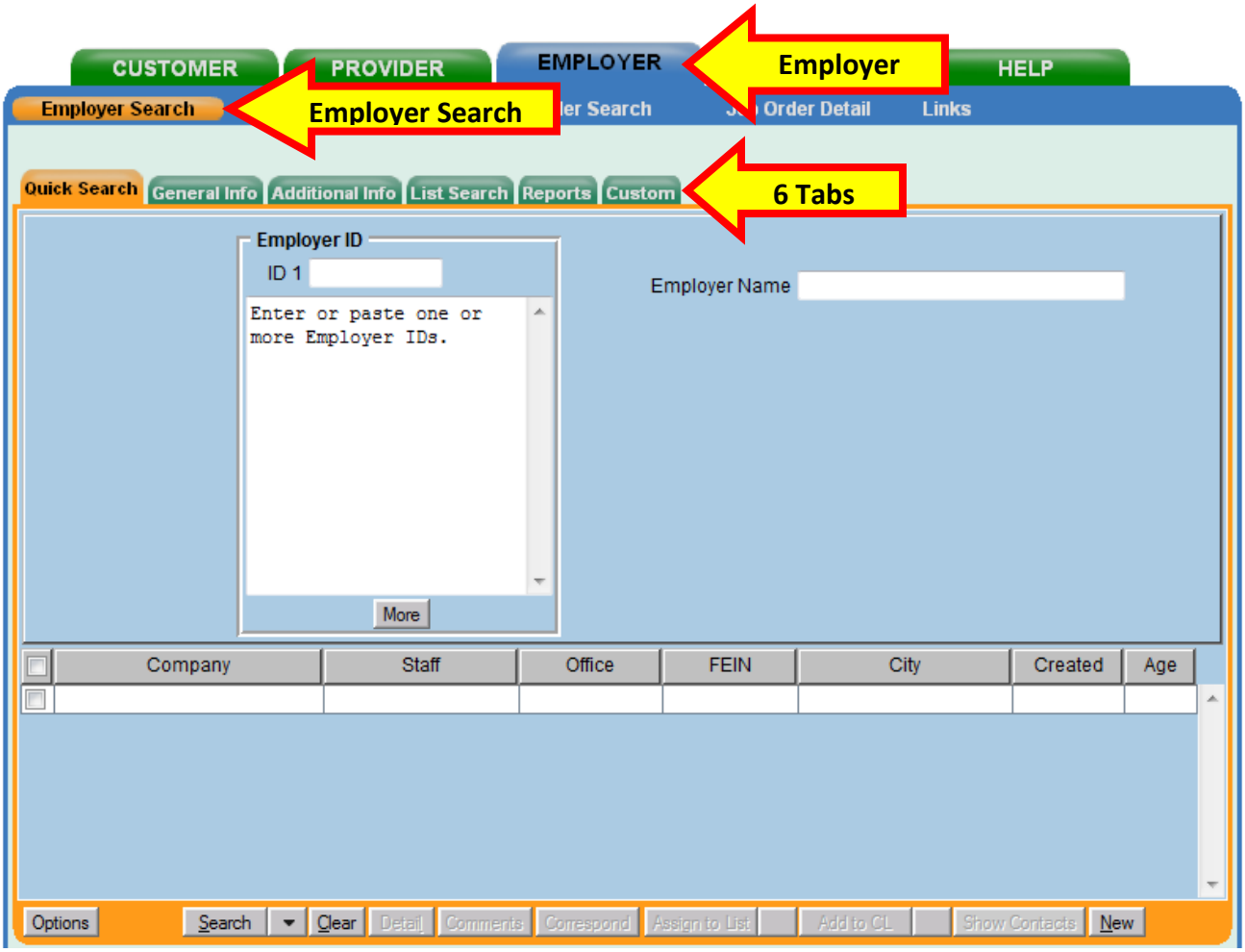
An Employer Search allows you to search for a single employer record or multiple employer records by filling in one or a combination of fields on the Employer Search Screens.

The main reasons to conduct an employer search include:

- Verifying if a particular employer has already been entered into OSOS prior to entering a job order; thus avoiding a duplicate entry
- Search for jobs associated with a particular employer
- Create a business jacket for a job central order to post a match activity

OSOS DATA ENTRY

To conduct a search, from the OSOS Menu Bar, click Employer, then Employer Search. The Employer Search Window contains six tabs: **Quick Search, General Info, Additional Info, List Search, Reports and Custom**. Quick Search and General Info are the most frequently used.

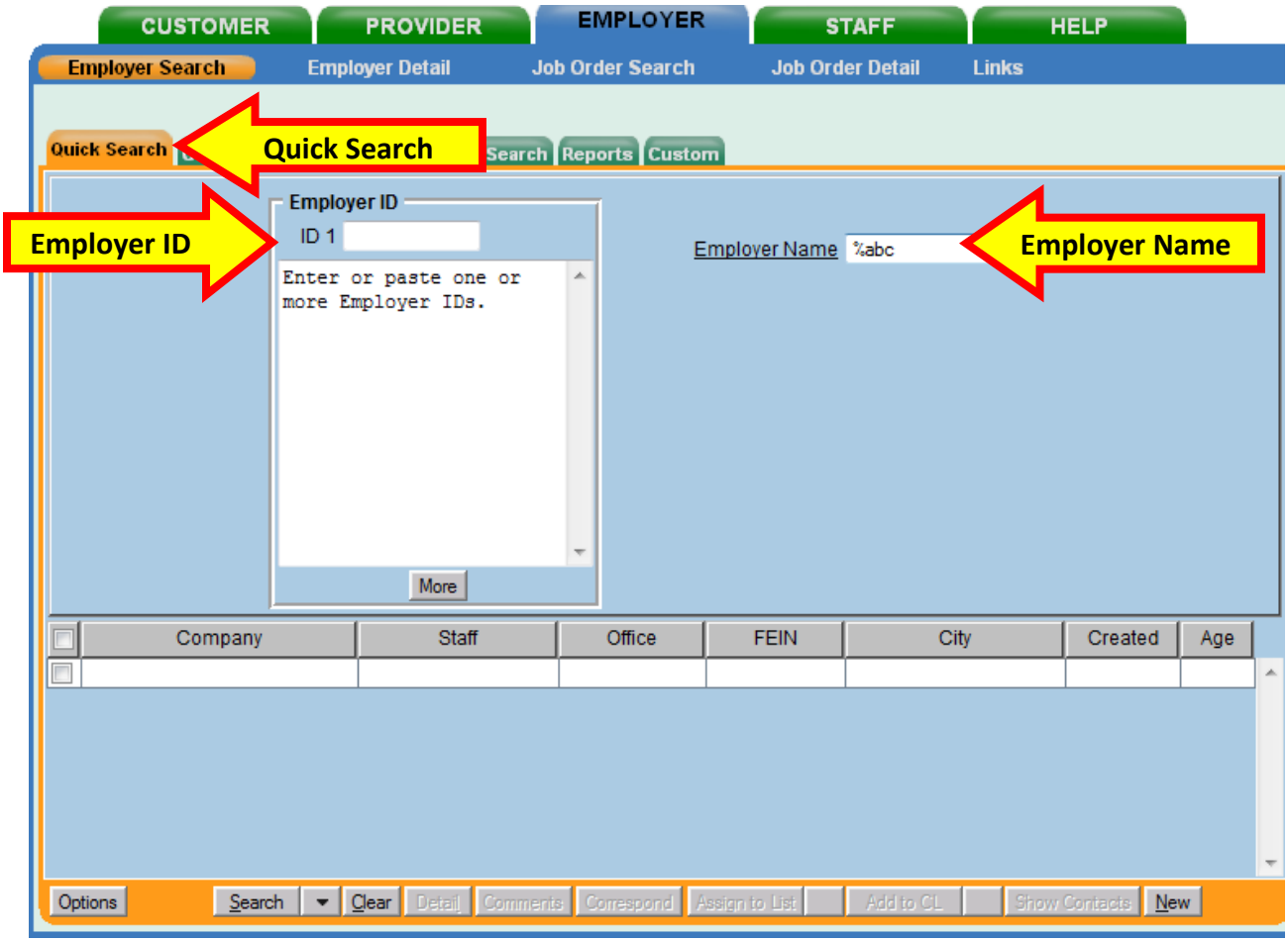


EMPLOYER SEARCH-QUICK SEARCH

Using the employer's NYID number is the most accurate way to search.

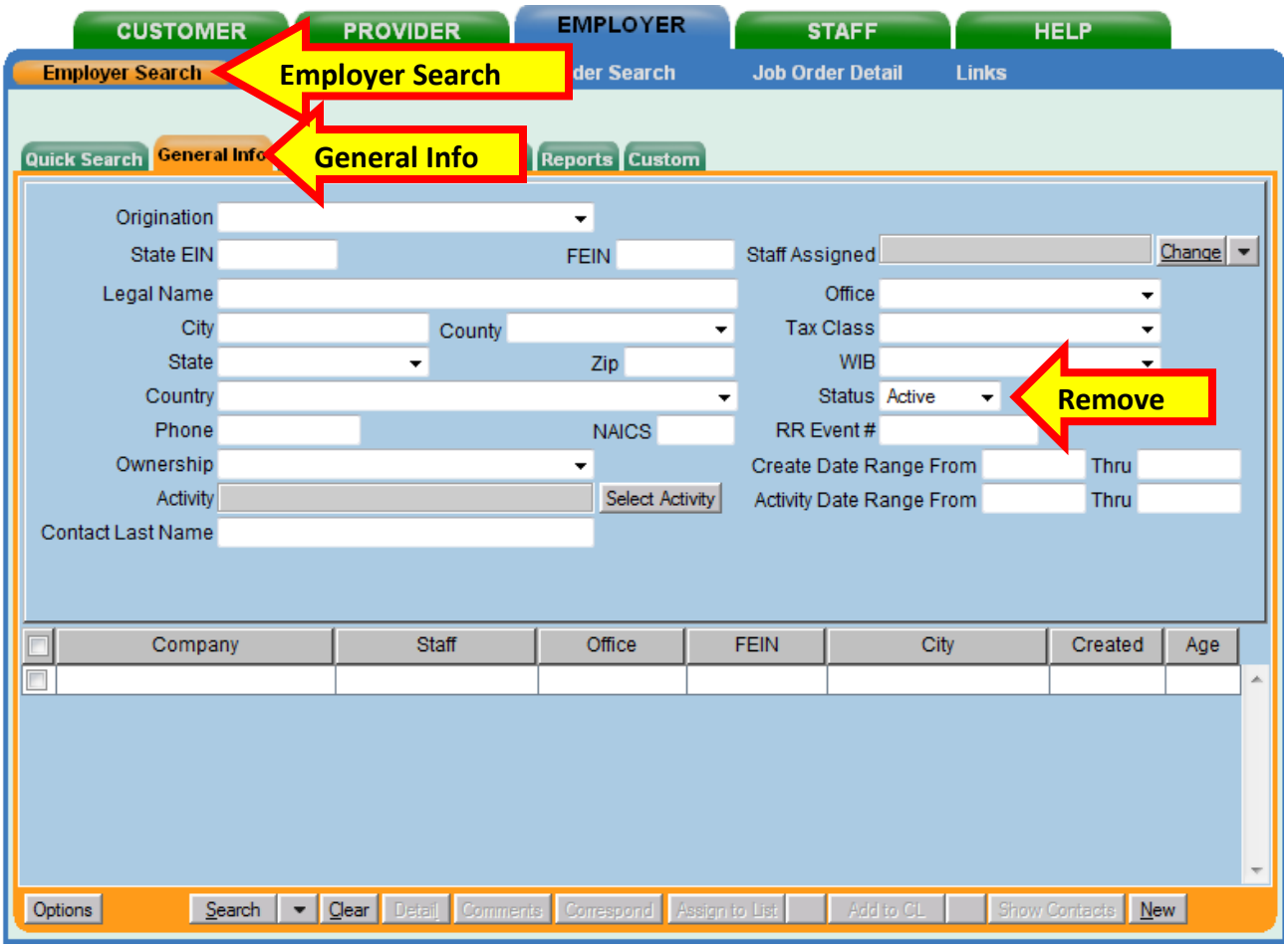
Use the % sign in front of some or the entire Employer/Business name to see all iterations of the Employer Name. Employers may be saved under multiple "versions" of the name. For example, Walmart, Wal Mart or Wal-Mart.

If a Company has multiple locations there should be ONE Business name for each location.



Tip: Try searching for the Employer/Business by using the word "The" as it appears as the first word in many Employer Names.

EMPLOYER SEARCH- GENERAL INFO TAB



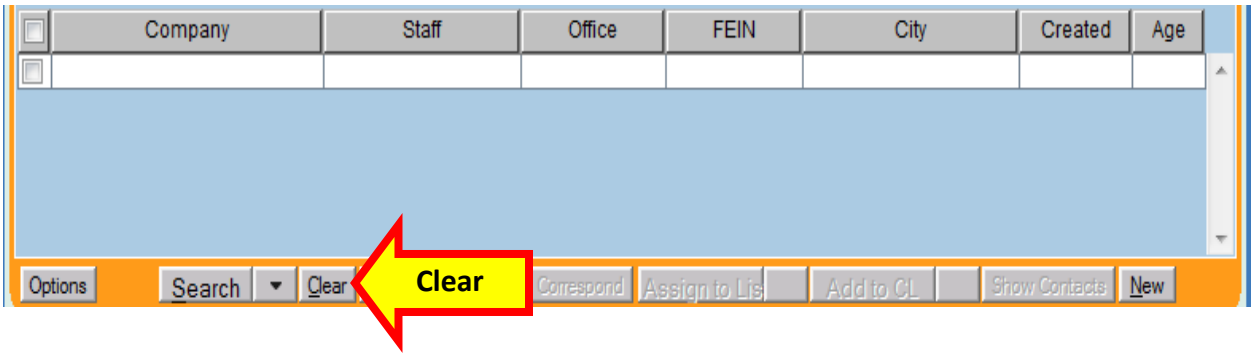
On the General Information Tab remove the “Active” in the Status field - “Less is better.”

If the desired business is labeled “inactive” change the status to active instead of adding a new Business Jacket. Verify that the Employer's contact information is accurate and update it if necessary.

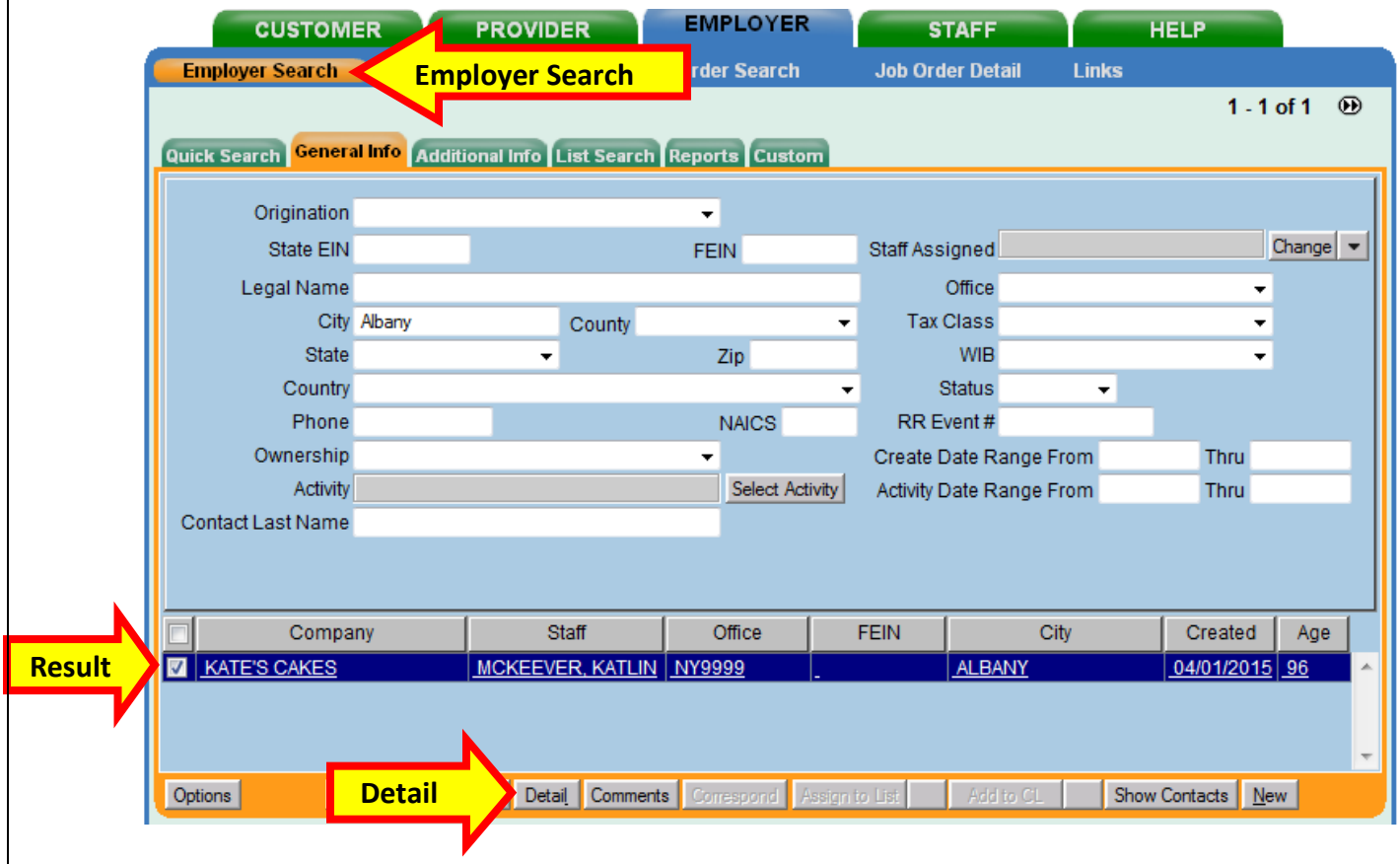
If search results need to be narrowed search by WIB or City.

If a business does not receive a service within 180 days the business will automatically become “inactive.”

To clear a search and start a new one, click the Clear button located on the bottom of the screen. This clears out ALL information entered and allows for a new search.



It is not recommended to type over the old information when starting a new search.



The results of the search will appear in the Search Results pane on the **Employer Search screen.** If the business appears in the search results field, click in the box to the left of the employer name and click the grey **Detail button** on the bottom of the screen to view the record. The Detail button will activate once one or more employers from the search results field are selected.

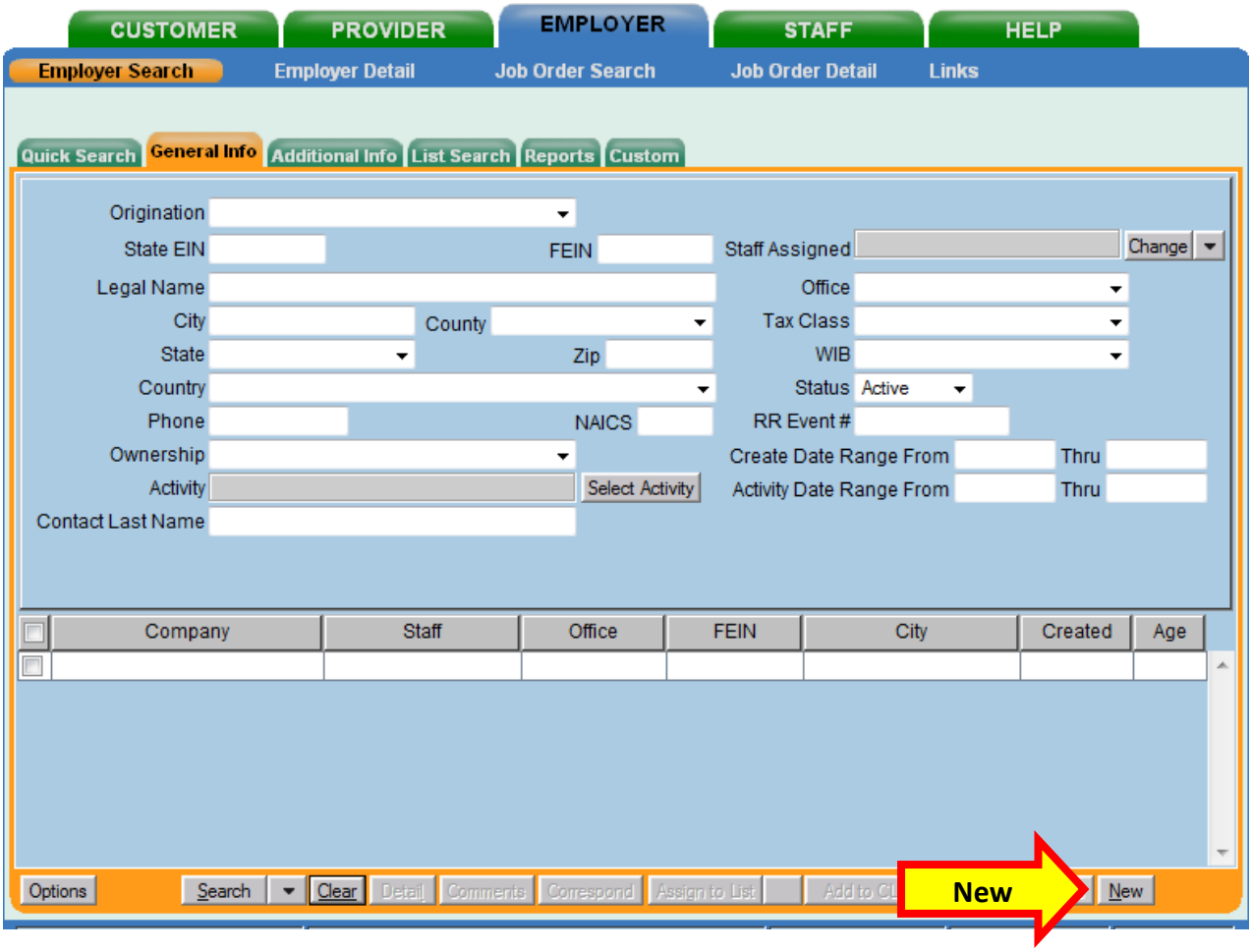
It is best for customer service reasons not to duplicate a business jacket if the business jacket lists a corporate address. If you have a different contact, you can add the contact person to an existing business jacket. If there is more than one business jacket for a corporate record it will be hard to determine if there has been contact by other staff and customer service can be undermined.

If no results are found, click the **New** button to create a new employer record.

CREATING A NEW EMPLOYER RECORD (BUSINESS JACKET)

If an employer does not have a record in OSOS create a new employer record.

A NEW employer record can be created from any Search Window tab by clicking the **New** button at the bottom of the screen.



Clicking the **New** button will bring up the Employer Detail tabs of the Employer Detail Module.

NEW BUSINESS JACKET- GENERAL INFO

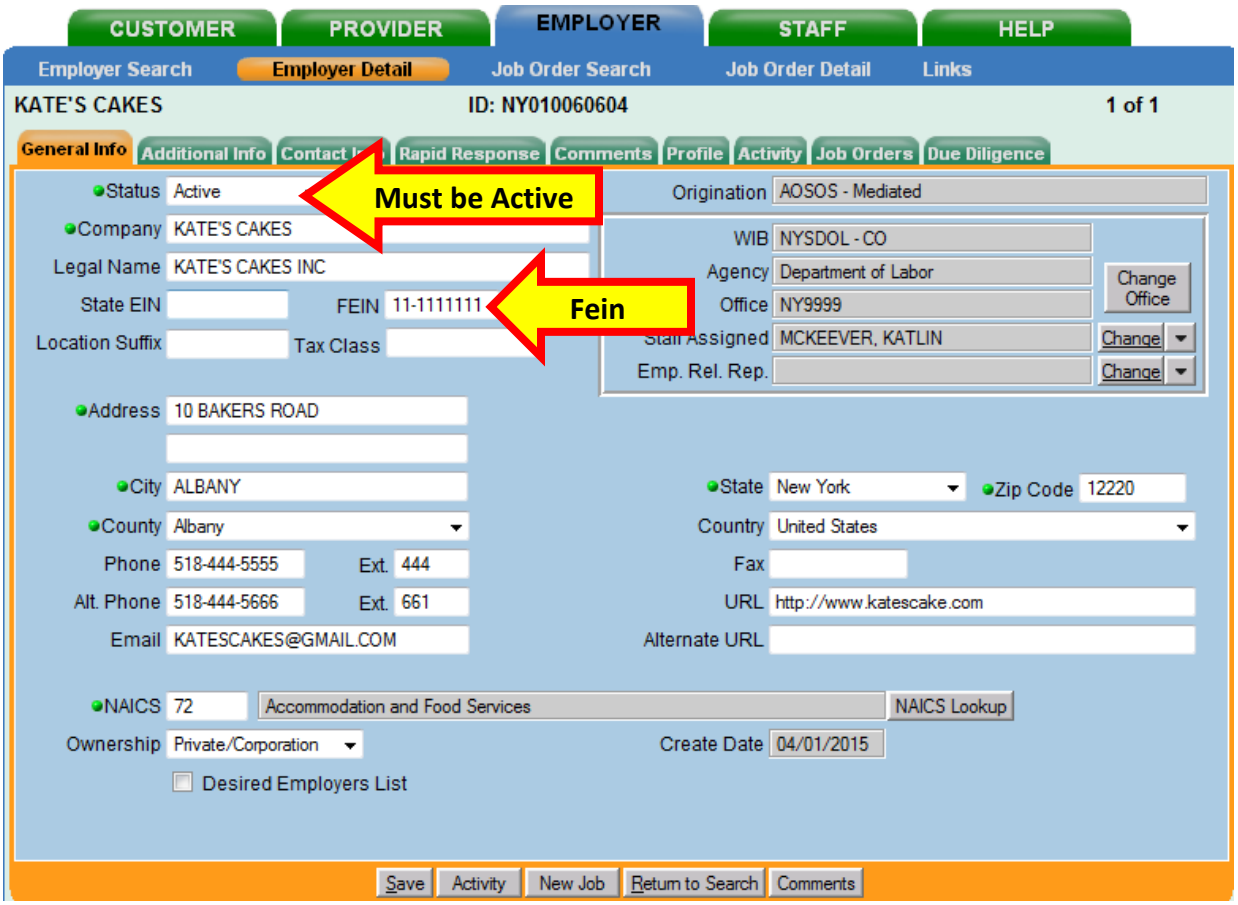
The employers' status must be **Active** to add a new employer. The **Status** data field on the **General Info** screen will be automatically set to **Active** by OSOS for new records.

Required information fields are highlighted by a green circle and must be completed.

The "green circle" required information on the **General Info** and **Contact Info** tabs must be completed in order to save the Business Jacket.

All **FEIN** numbers are mandatory. This is a performance indicator. It is used to track placements for the business and track hires.

If a business does not disclose the FEIN contact Business Services. The FEIN can be acquired through other resources.



Fill in the Phone, Email and URL fields in the General Info tabs. This information can be helpful when researching the business. It will help determine what kind of positions the business is looking to fill, their mission, and their product. Understanding the customer prior to outreach is important!

NEW BUSINESS JACKET - ADDITIONAL INFO

The Additional Info tab has several fields that aren't required to create an employer record but should be marked "Yes" if the information is available.

Click the dropdown arrow next to each field to update & select "Yes."

When the fields are selected "Yes" on the business profile, the benefits will show on all future job orders. Confirm that the benefits are offered for the job order that is being inputted. Be aware that Businesses don't always offer the same benefits for every position.

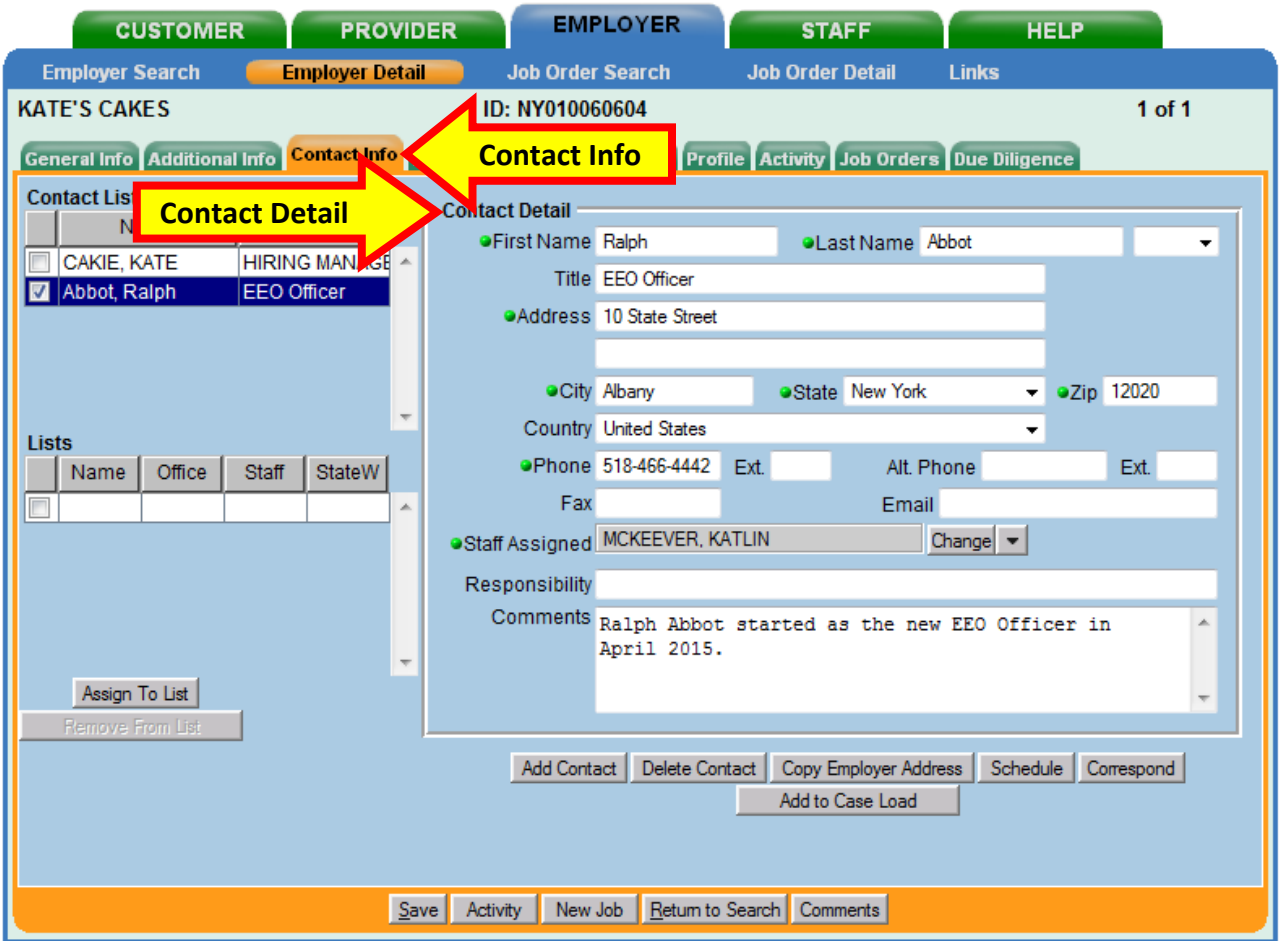
Enter the Number of Employees and Seasonal Employees (if applicable). It is important to know the number of employees for grant reimbursement rates.

NEW BUSINESS JACKET - CONTACT INFO

At least one employer contact person is required. If multiple contacts are created, the first contact will be the default contact. The contact information is carried over into job orders' associated with the employer.

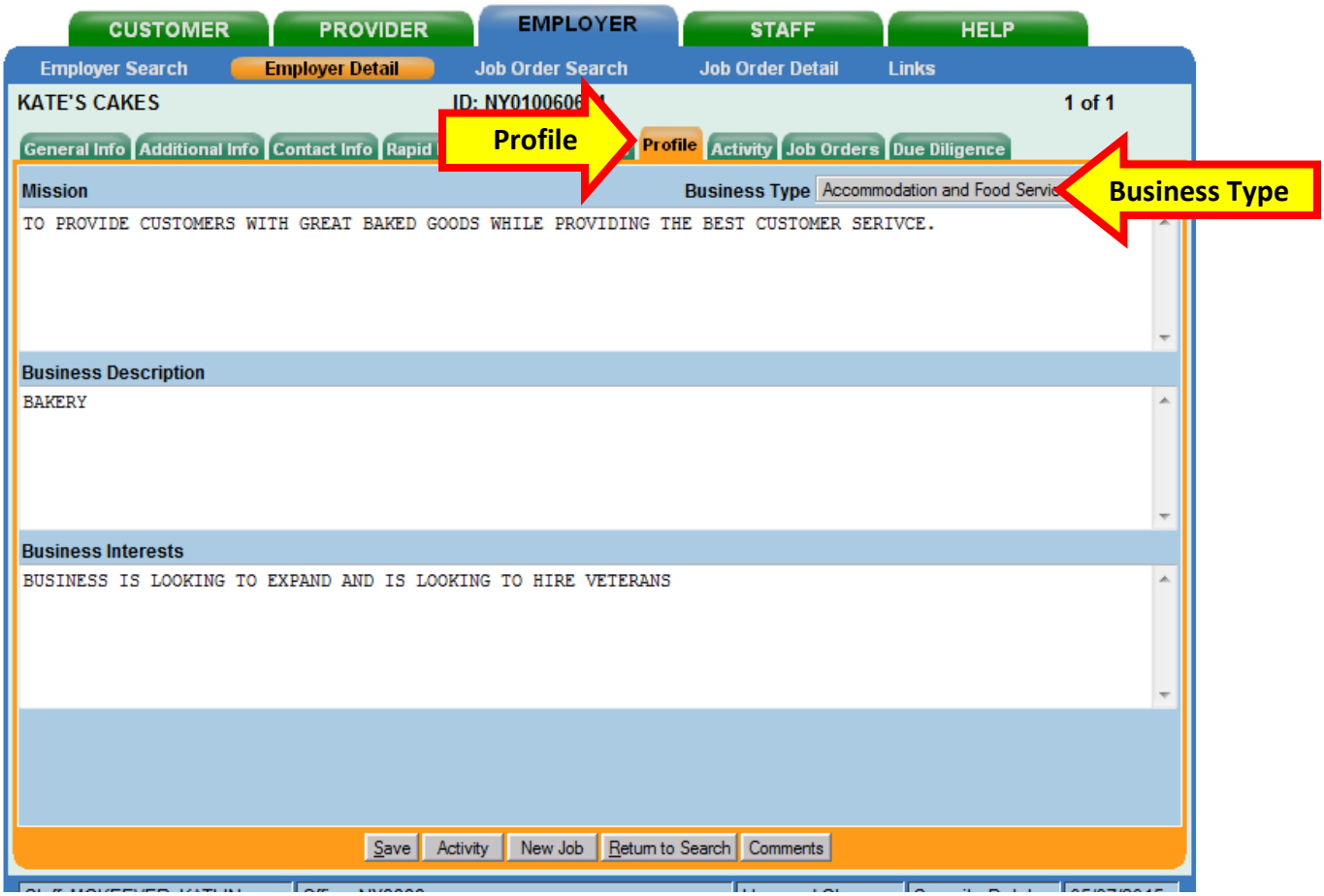
Enter all required fields in the contact detail section. The **Title** field is not required but recommended for future reference. (i.e. hiring manager, HR manager etc)

For LVER staff an EEO Officer is a valuable contact



NEW BUSINESS JACKET - PROFILE

Enter the Business Type, Mission, Business Description and Business interests on the Profile tab.



Although this information is not required to save the new business jacket, information recorded here can be helpful for staff to identify businesses that have indicated a preference for hiring veterans; federal contractors etc.

Refer to the business's website when filling out the Profile tab

Listing past titles hired will be helpful for future Job Development leads.

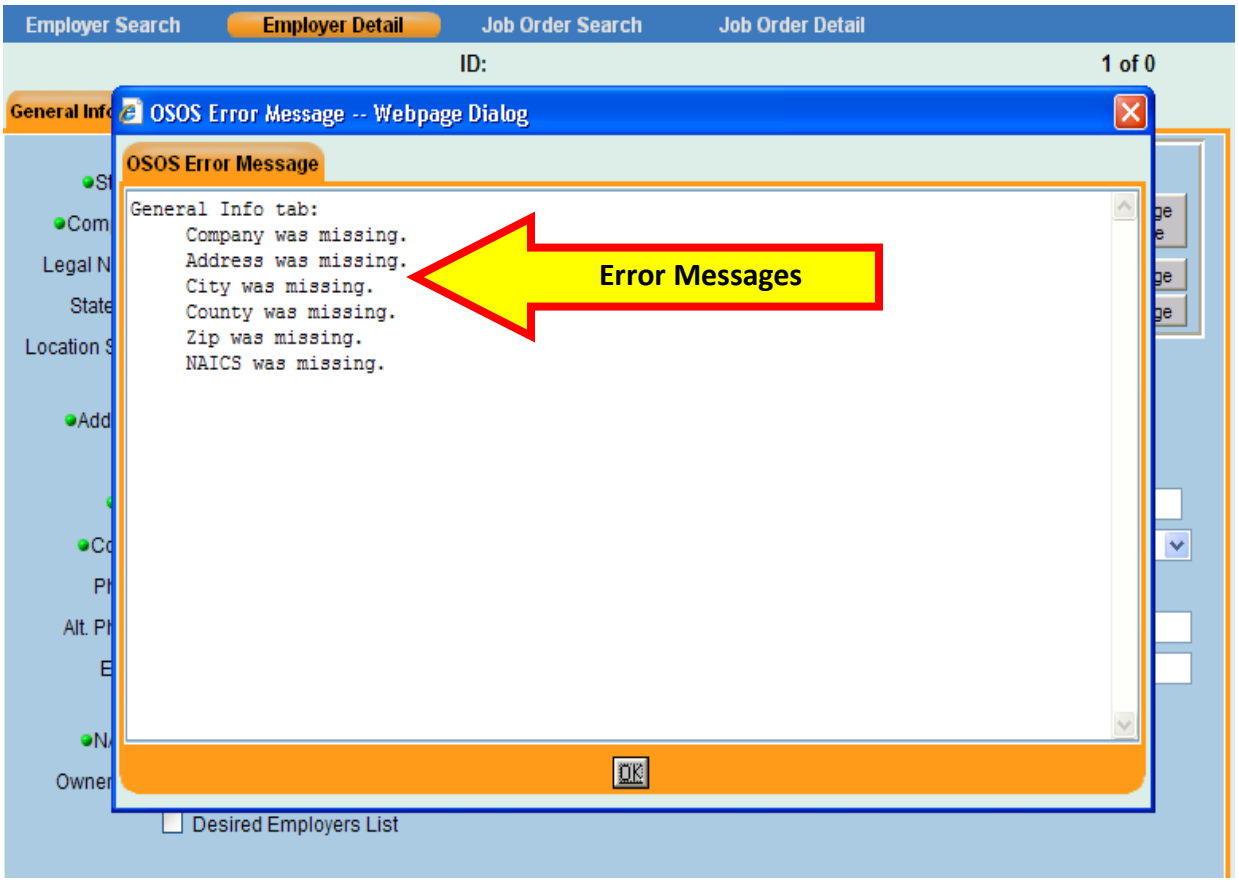
NEW BUSINESS JACKET - ACTIVITY & JOB ORDER

The Activity tab will record any OSOS activities provided to the employer by staff after the business jacket is created.

The Job Order tab will contain all the staff entered job orders which will be indicated by an **NY.**

SAVING YOUR BUSINESS JACKET

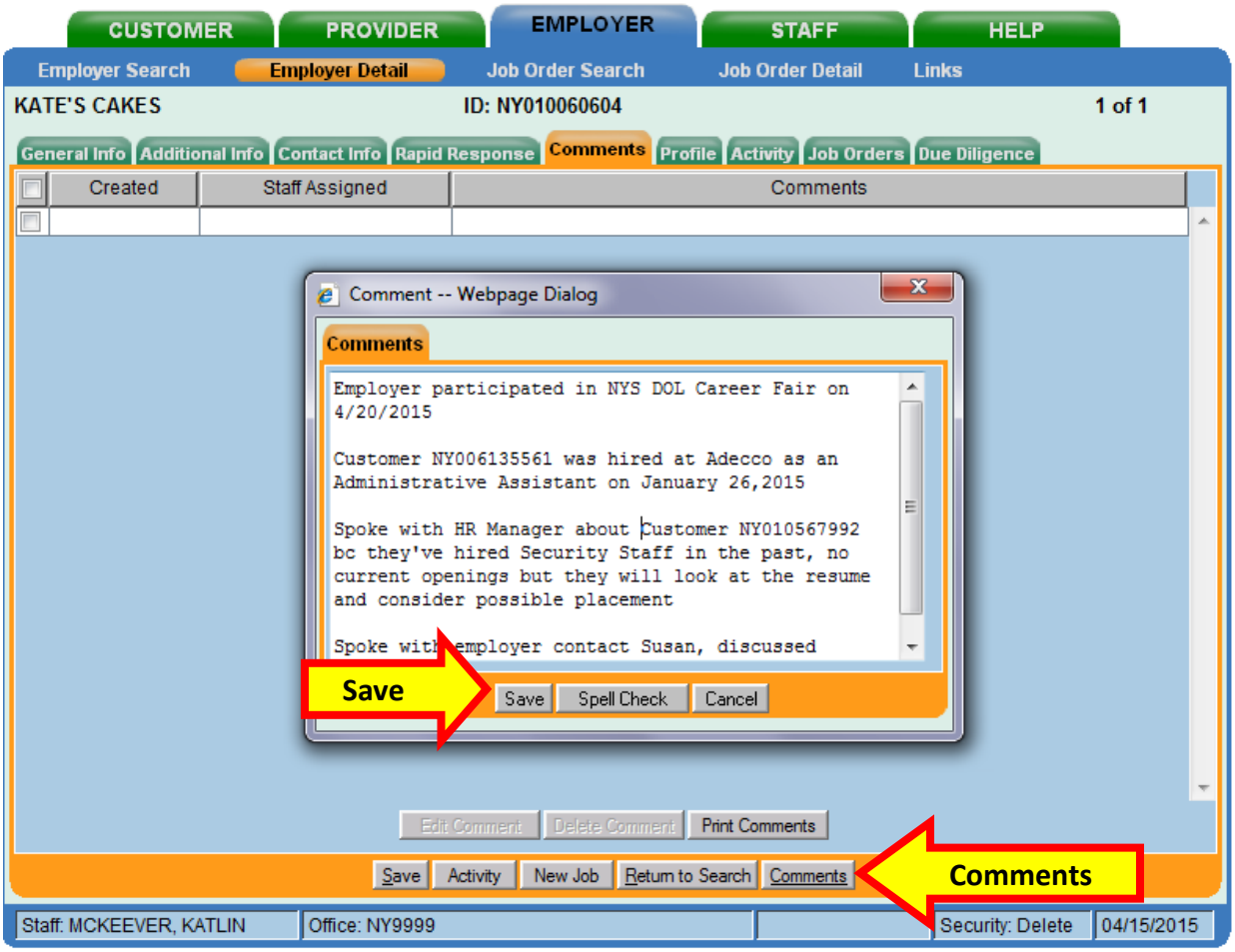
A new employer record cannot be saved until all of the required information is completed. An error pop-up message will appear if any required information has not been entered.



ADDING COMMENTS TO A BUSINESS JACKET

Be sure to include comments when any services or information is provided to a business.

Recording comments will improve communication between staff to prevent any overlapping of outreach.



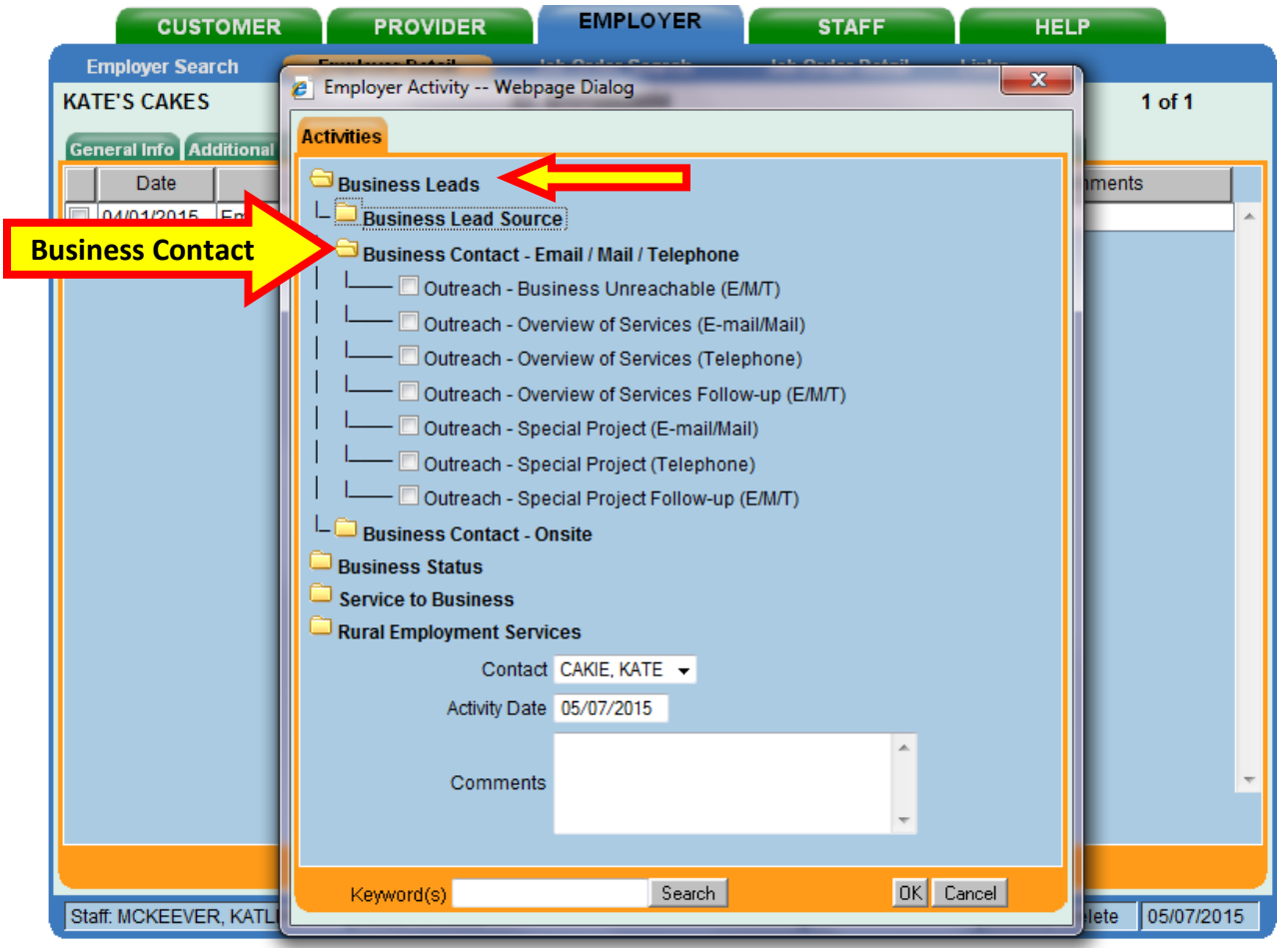
ENTERING BUSINESS ACTIVITIES IN OSOS

For help with recording business activities see:
http://labor.ny.gov/workforcenypartners/osos/OSOS-Employer-Services.pdf

As Business Outreach occurs track the following items on the business jacket.

Click the Business Leads folder to view the Business Contact Email/ Mail/ Telephone folder.

In the Business Contact – E/M/T (Email/Mail/Telephone) folder record your method of contact. Most initial outreach will be an overview of services.



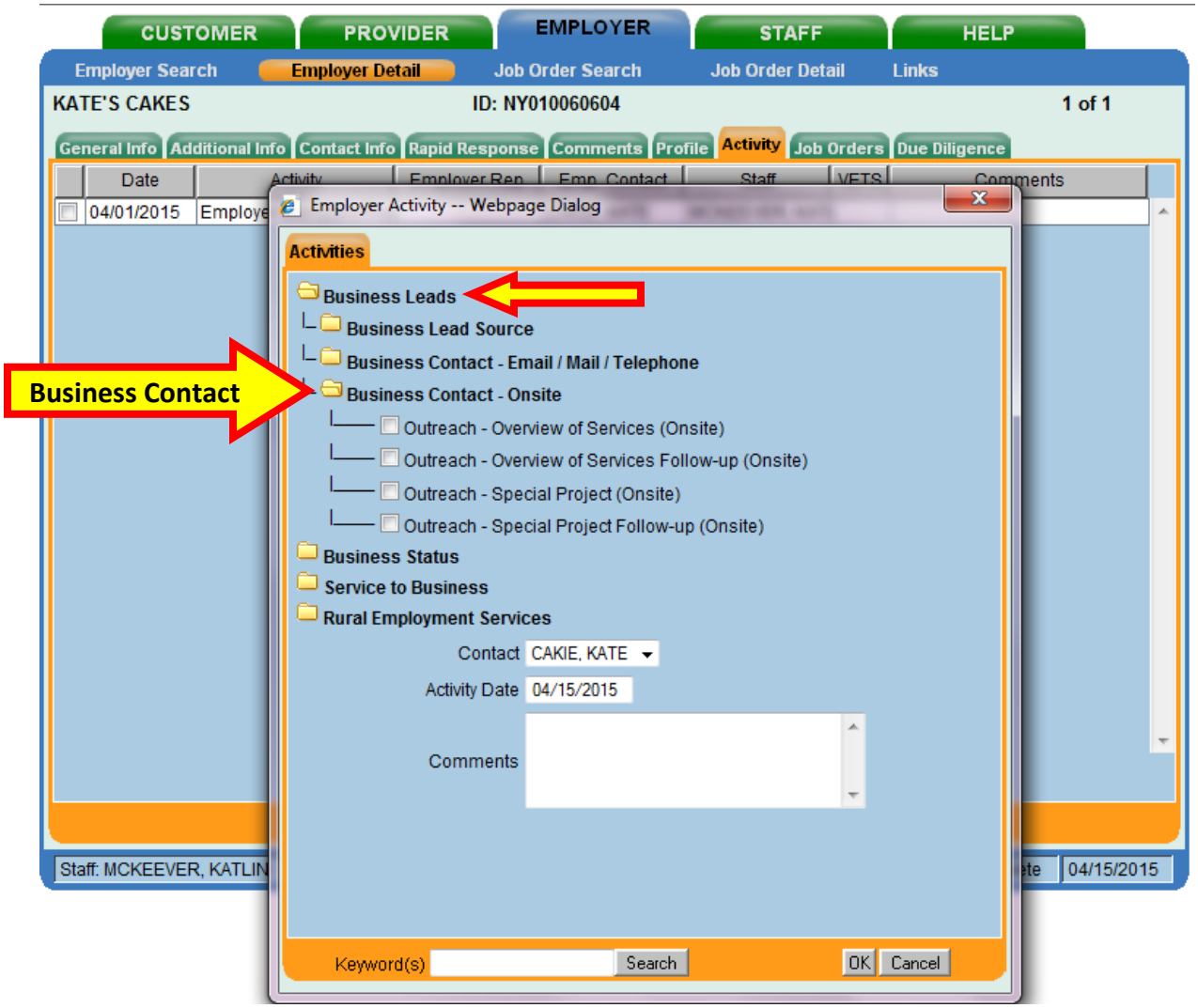
Quality outreach is speaking to someone from the business. Leaving a message does not count as an outreach activity. To track these outreach efforts record the Outreach-Business unreachable activity.

ONSITE OSOS ACTIVITIES

Record these activities from onsite outreach.

Click the Business Leads folder to view the Business Contact- Onsite folder

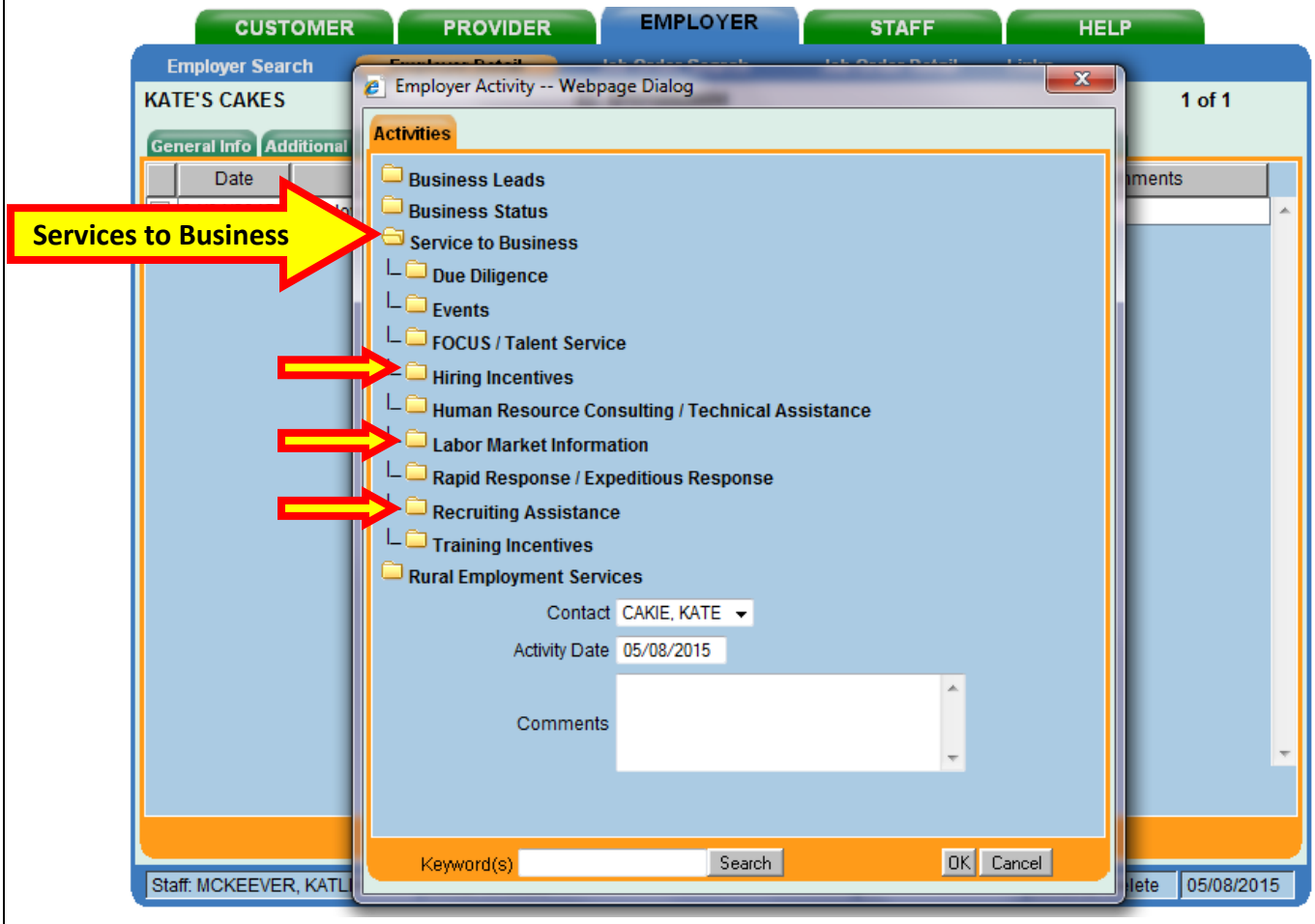
Field visits need to be approved in advance and need to be strategic – plan multiple visits on one day in an area to make the trip as productive as possible.



SERVICES TO BUSINESSES OSOS ACTIVITIES

Under Services to Businesses focus on:

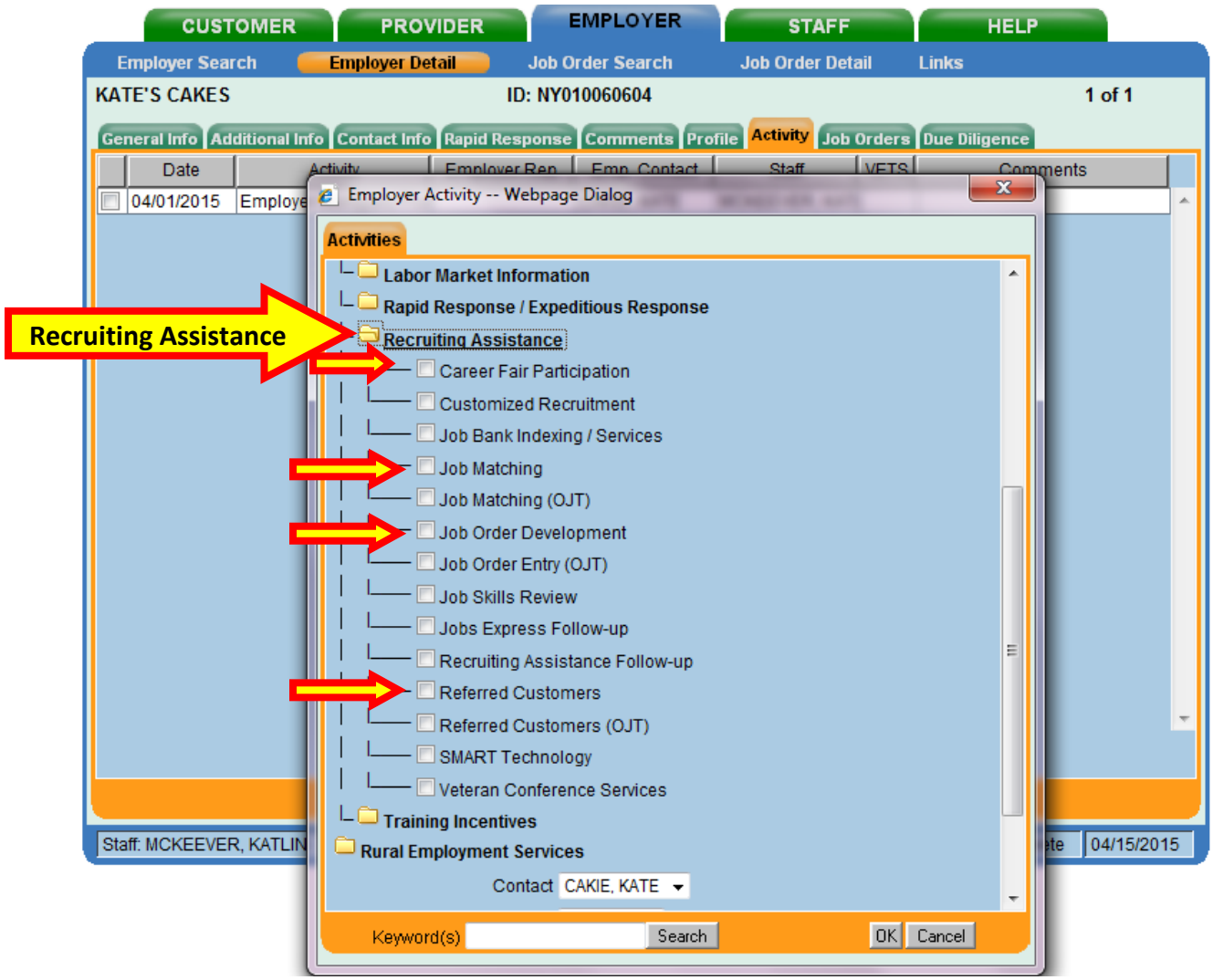
- Hiring Incentives
- Labor Market Information
- Recruiting Assistance



RECRUITING ASSISTANCE OSOS ACTIVITIES

Under Recruiting Assistance focus upon:

- Career Fair Participation
- Job Matching
- Job Order Development
- Referred Customer



If a business contact expresses interest in other services direct them to a Business Services Representative.

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