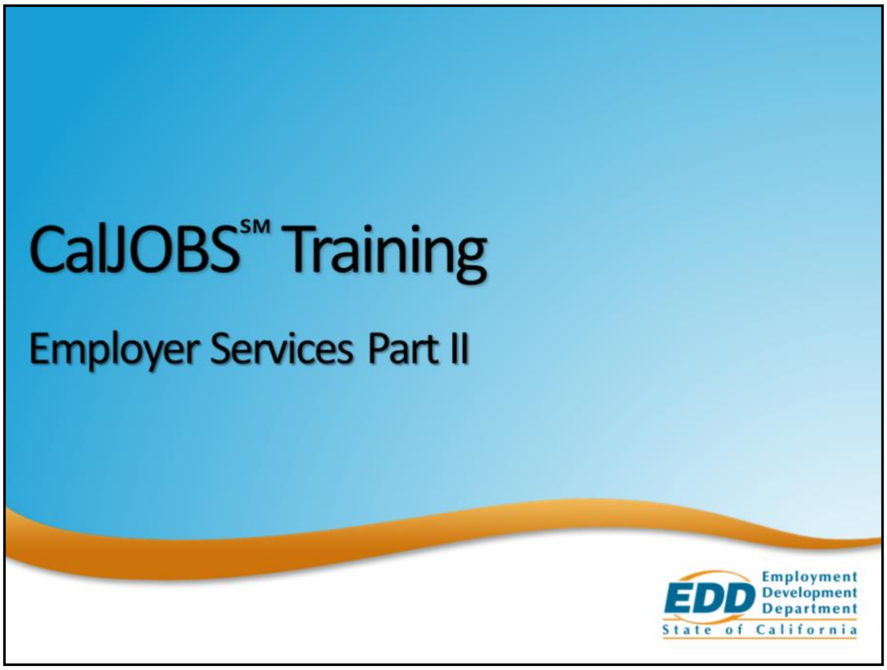


Welcome to the CalJOBS Training: Employer Services Part II.

This module will illustrate how Workforce Staff can use CalJOBS to assist employers.

After completing this module, you will be able to:

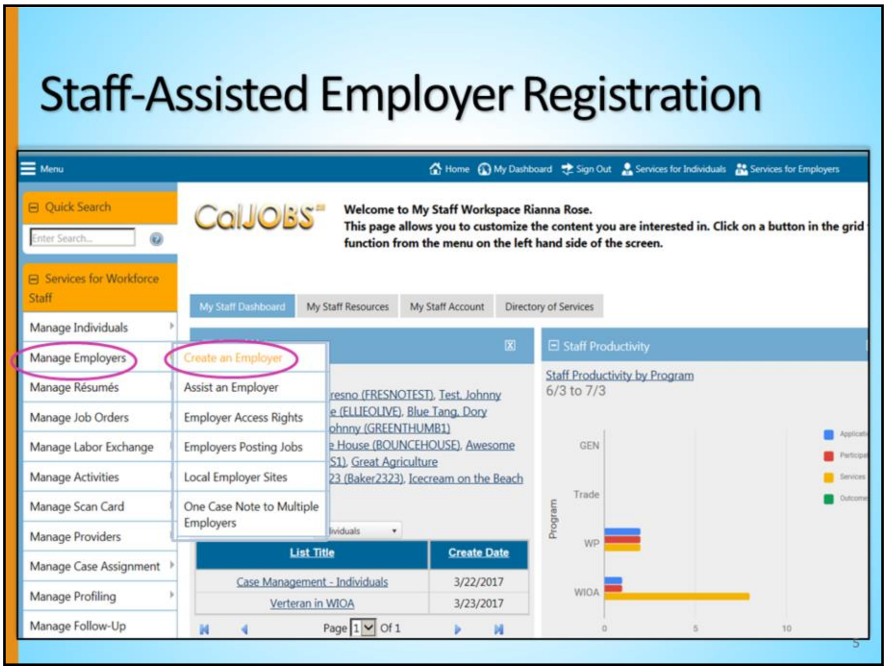
1. Register an employer as a staff member
2. Navigate employer case management in the system
3. Enter employer activity codes to track services provided
4. Utilize the system’s message center
5. Utilize employer related reports

Staff-Assisted Employer Registration

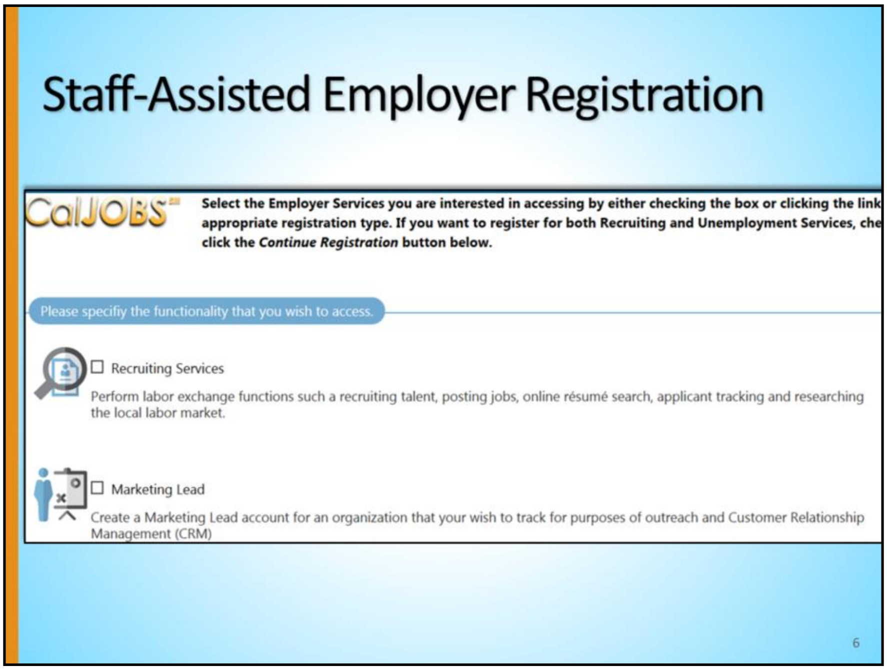
Next, we’ll see how staff can act on behalf of employers and assist employers.

While employers can complete multiple tasks using CalJOBS themselves, staff members can assist employers in completing tasks as well, including posting jobs and searching for qualified candidates. In doing this, staff assist employers and execute tasks on the employer's behalf.

To begin assisting an employer as a staff member, log in to the CalJOBS website with your username and password.



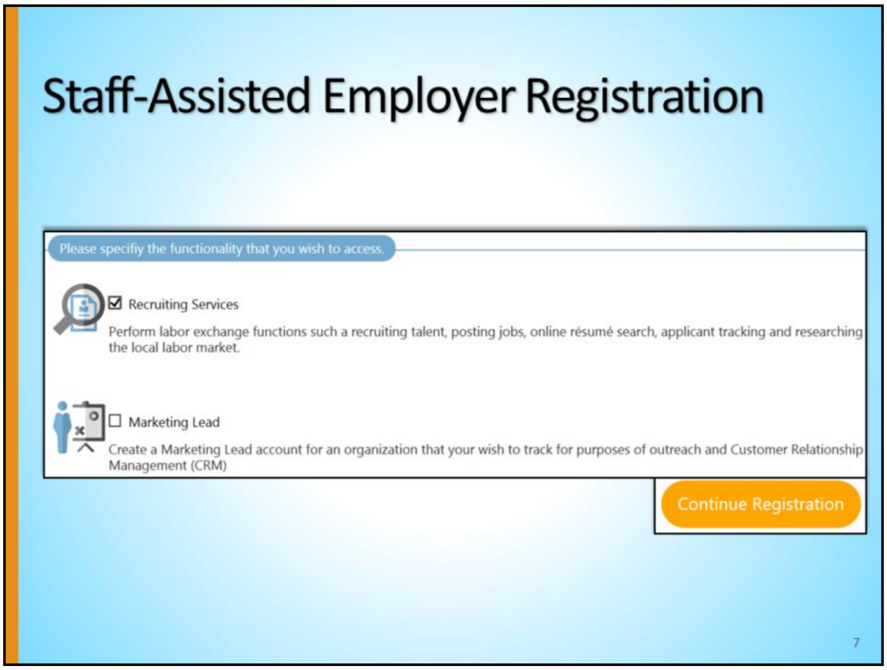
From the left menu, **Services for Workforce Staff**, hover over **Manage Employers**, and choose **Create an Employer**.



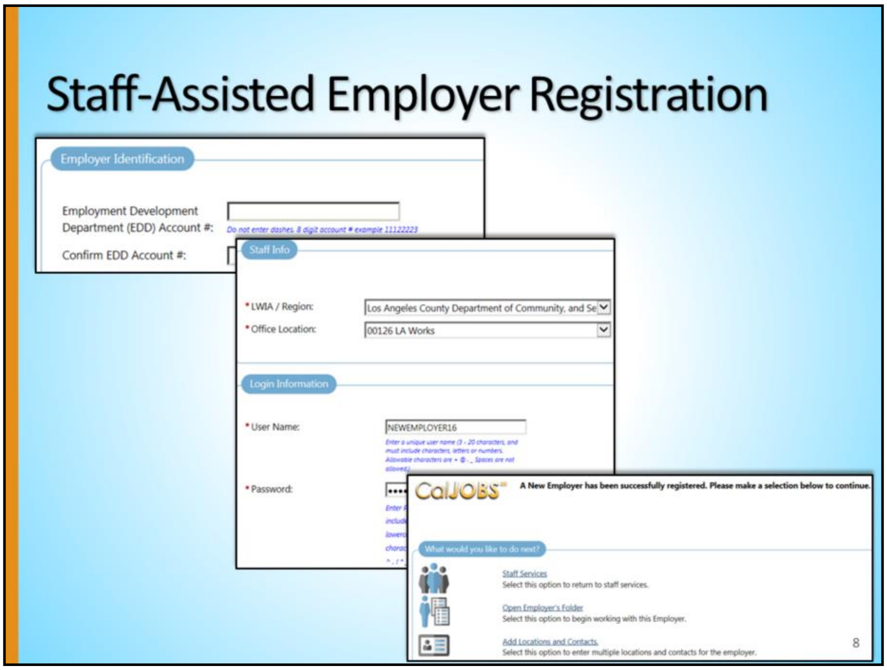
There are two registration types: **Recruiting Services** or **Marketing Lead**.

Recruiting Services refers to employers who want to register and post jobs to recruit candidates; these are also called “preferred” employers, because they have been vetted by the EDD staff. This module will cover registering an employer using the Recruiting Services access type.

The **Marketing Lead** registration type will put the employer in the system as a contact to be managed in the Customer Relationship Management module. If you register an employer as a marketing lead, that employer will not be able to post jobs or match with qualified candidates, and they will have very limited access to the system.



To register an employer into CalJOBS, select the first option, **Recruiting Services**, then select the “Continue Registration” button.

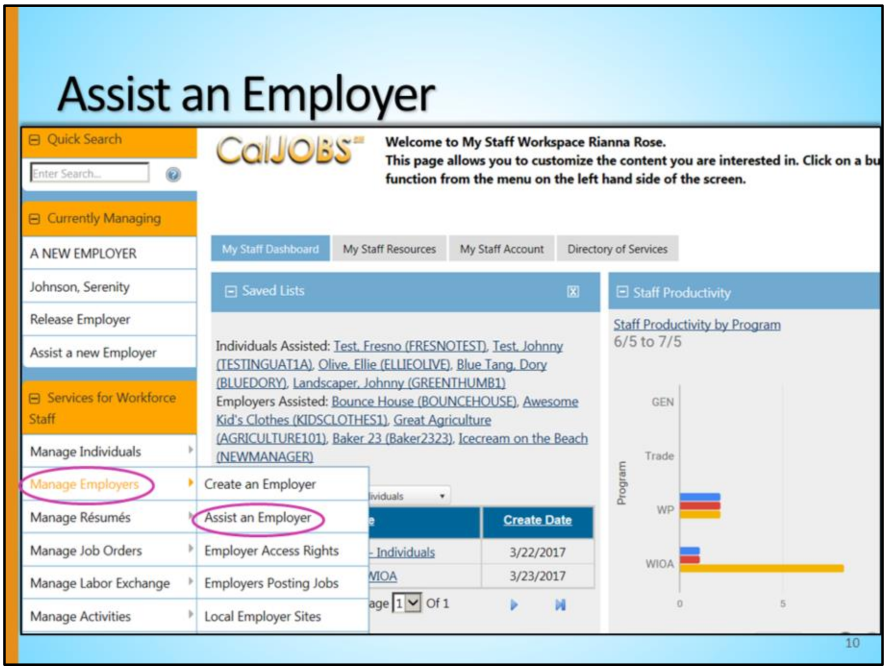


Staff will encounter the same screens that the employers encounter when they register to create a CalJOBS account. It is important that staff write down the employer's username and password so that they may have access later on.

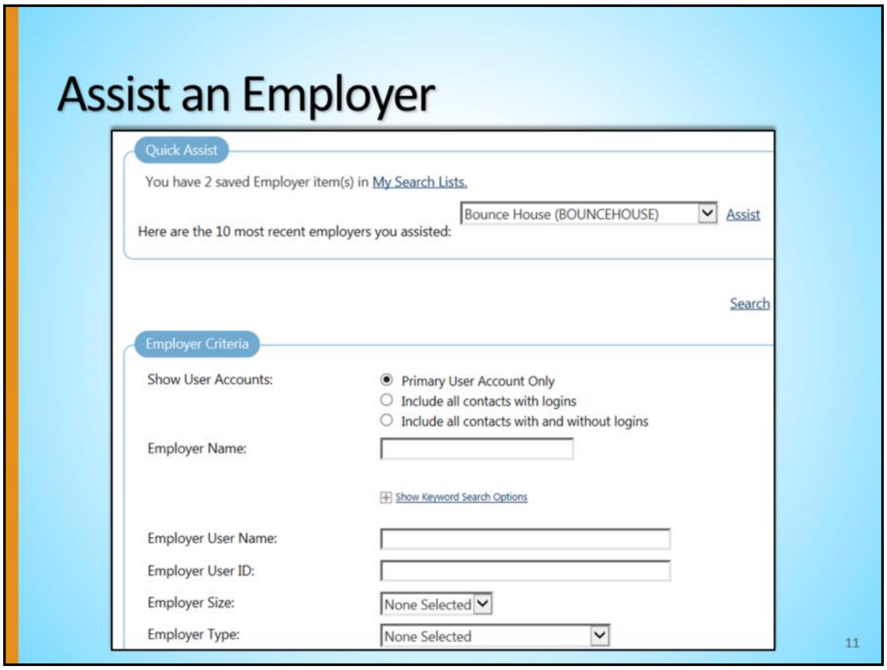
Once staff have completed the registration, they will receive the **What would you like to do next?** Screen.

Employer Case Management

9



Staff can also assist an employer who is already registered. Sometimes, staff may want to work on the employer’s behalf to post a job order, manage jobs, or search for résumés. To assist an employer, under **Services for Workforce Staff**, hover over **Manage Employers,** and select **Assist an Employer**.

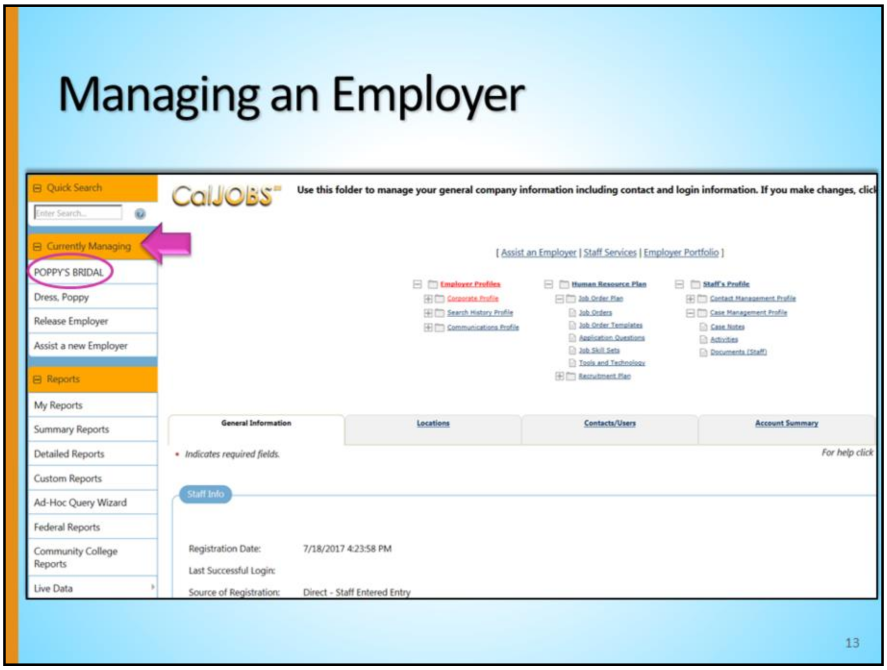


Staff will be directed to a search criteria page with multiple ways to search for an employer. Staff can use the information they have regarding the employer to find them in the system, such as: Employer Name, Company Address, or Employer User Name.

In addition, if the employer is one that staff have recently assisted, they may be found in the **Quick Assist** area in the recent employers assisted.

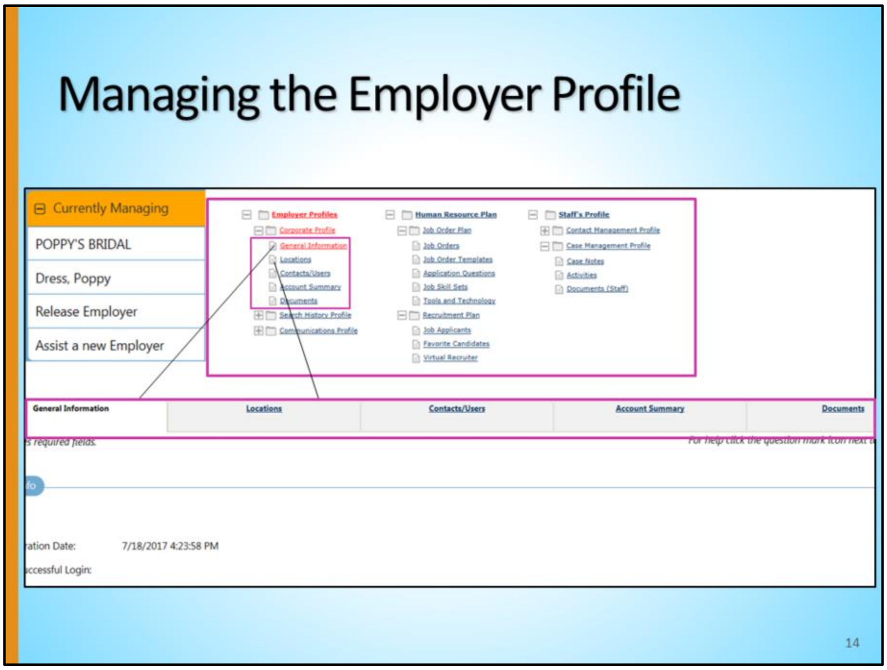
Select the “Search” button to search for the employer.

Select the employer from the results list by clicking on their <u>Username</u>, or accessing a specific section of their profile from the **Action** column.



Under the **Currently Managing** menu at the top of the left menu, staff will see the name of the employer in whose account they are currently working with.

Under the same menu of **Currently Managing**, staff should always select **Release Employer** when no longer assisting that employer.



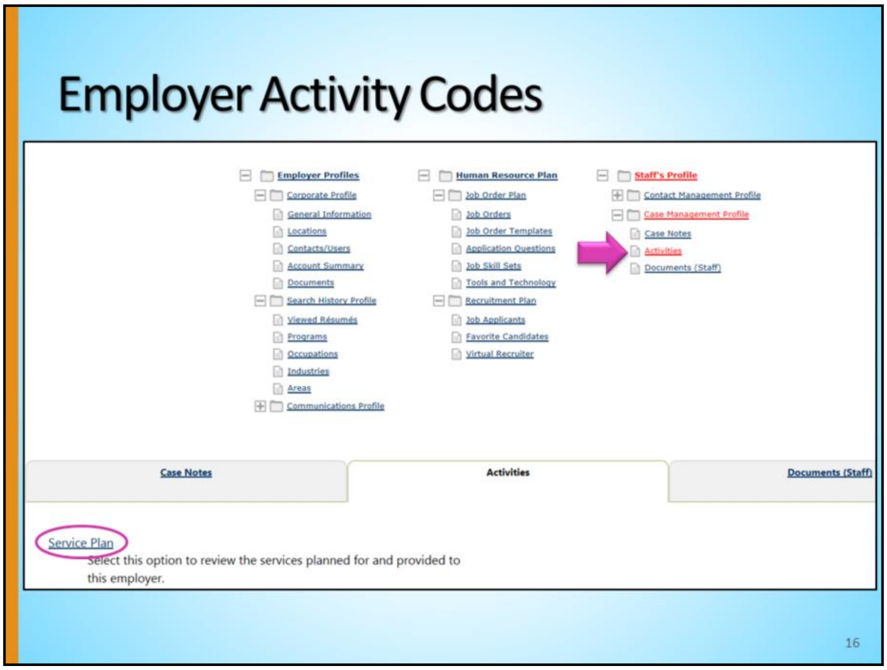
When managing an employer, staff have the ability to view multiple aspects of the employer's profile, including their locations and contacts/users, job orders, favorite candidates, and case notes. These pieces of information can be seen highlighted on this screenshot.

In this screen shot, we are assisting an employer and looking at information within their **Employer Profiles** folder, **Corporate Profile** subfolder, and <u>General Information</u> link. You can see this path because it is highlighted in red writing.

In addition, note that each subfolders' contents correspond to the tabs in this screen as well.

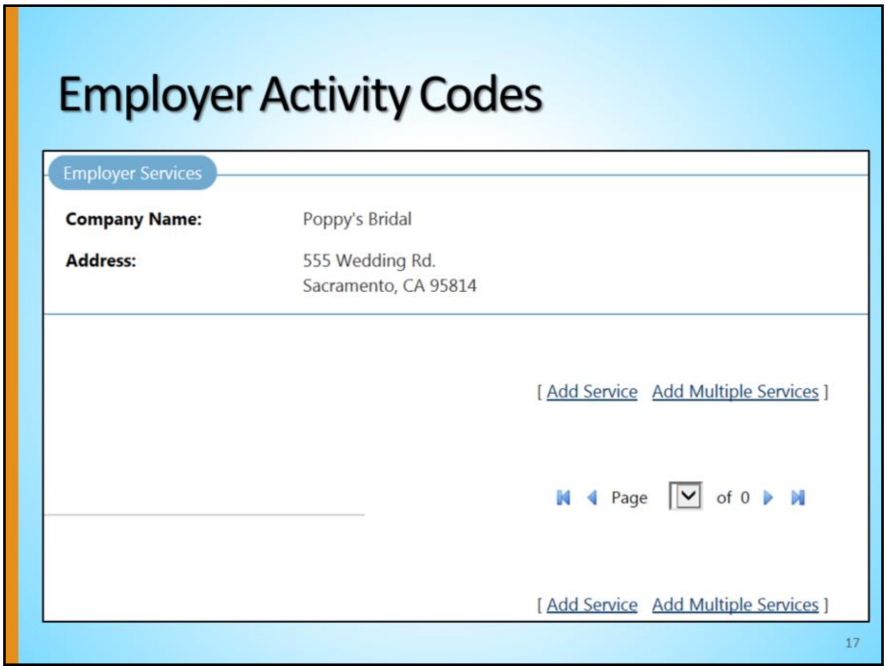
Employer Activity Codes

15



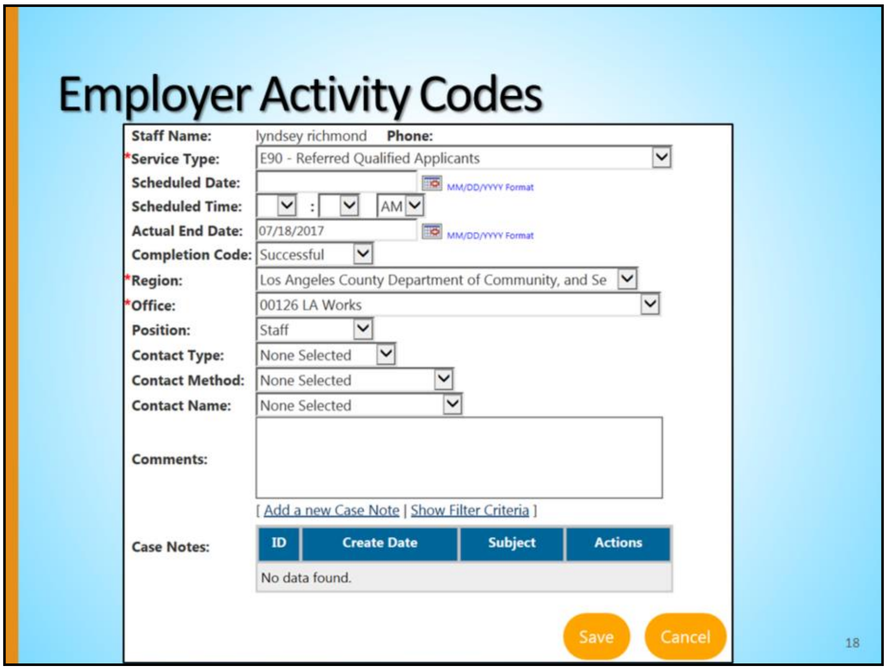
Staff should enter employer activity codes for services they provide to the employer, similar to adding activity codes to services provided to individuals.

To add an activity for a service provided, while **Currently Managing Employer**, under the **Employer Profile**, find the **Staff's Profile** folder, **Case Management Profile** subfolder, select the Activities link.
While in the **Activities** tab, select the Service Plan link.



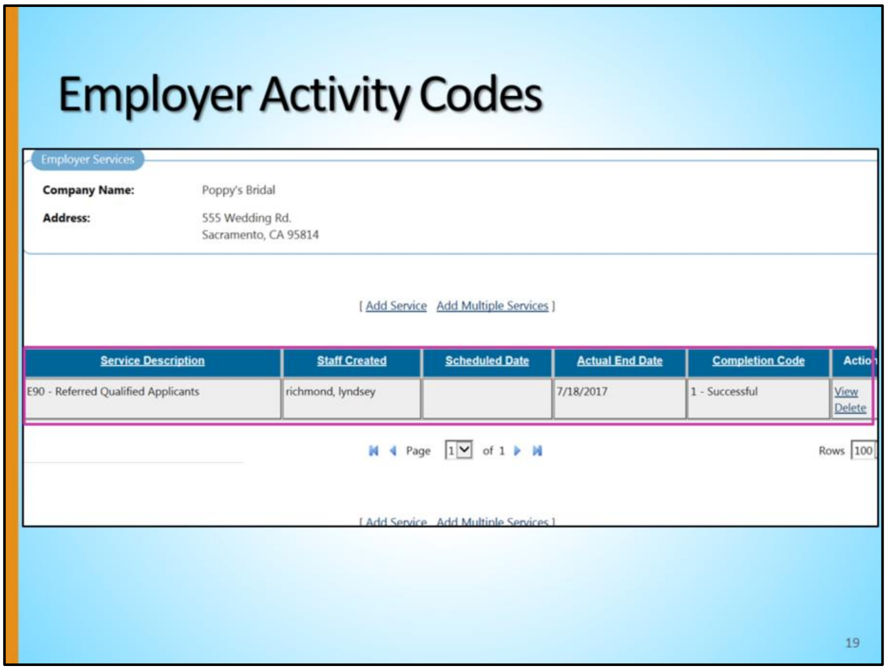
If applicable, here is where the existing activity codes will be listed for this employer. In our example, no services have been added.

To add a single service, select the Add Service link. To add multiple services, select the Add Multiple Services link. Here, we will add a single service.

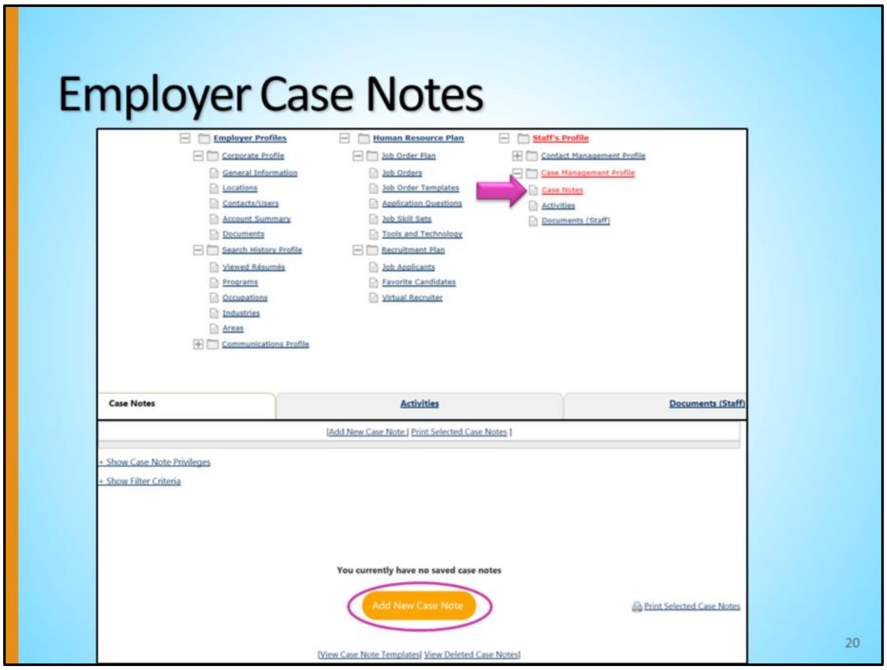


In the next screen, enter the required fields noted by a red asterisk. If you enter a **Completion Code**, be sure to enter an **Actual End Date,** as well. Select the "Save" button when complete.

Note: Please refer to the Activity Code WSIN 17-09 for definitions of employer activity codes and when to use them.



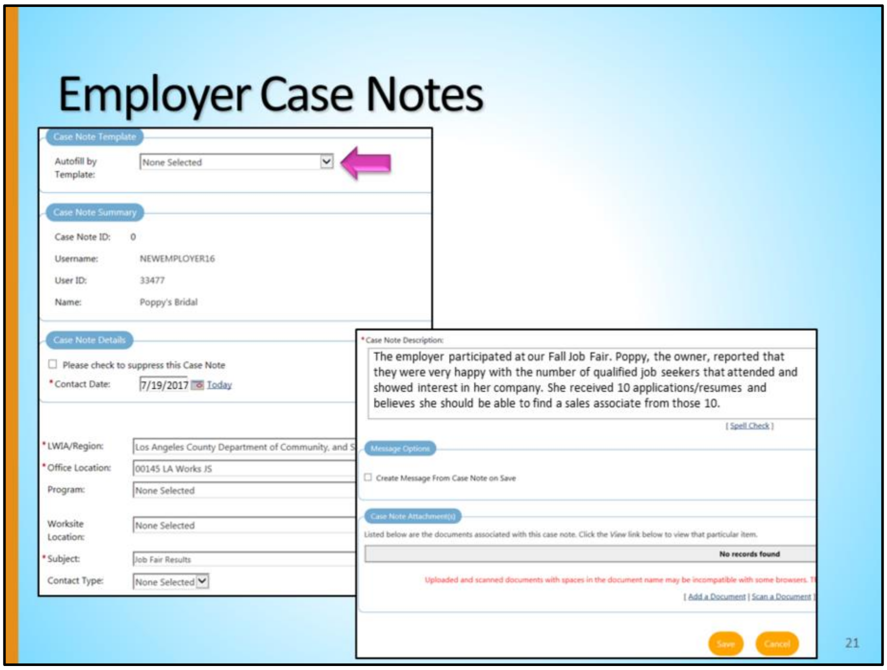
The added service will now populate on the table.



Case notes are another way to track services provided to employers. To create a case note on an employers account, under the Staff's Profile folder, Case Management Profile subfolder, select the Case Notes link.

This will bring you to an area with existing case notes for this employer, if any. If there are existing case notes, you can filter them using the Show Filter Criteria link.

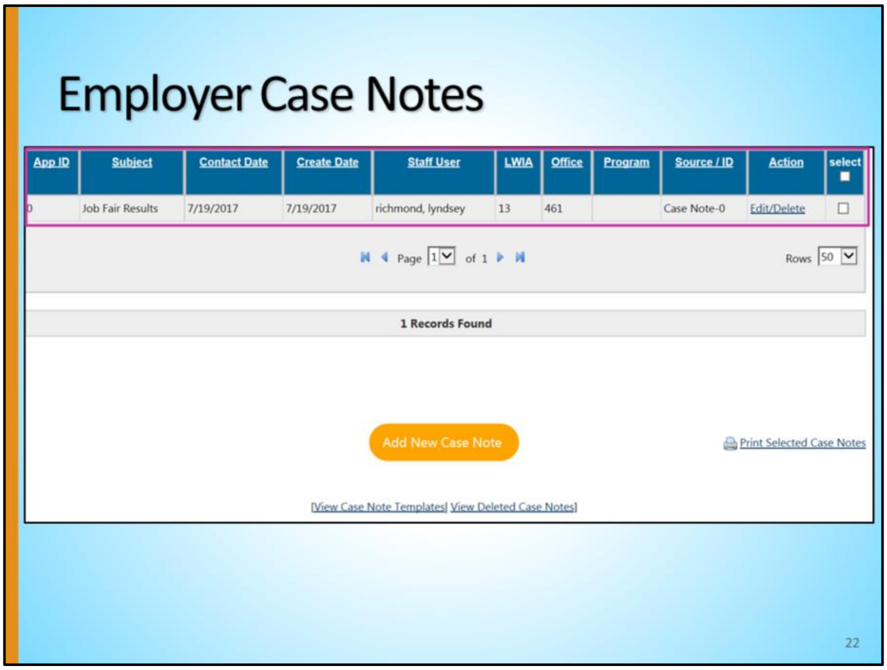
To add a new case note either select the Add New Case Note link or the "Add New Case Note" button.



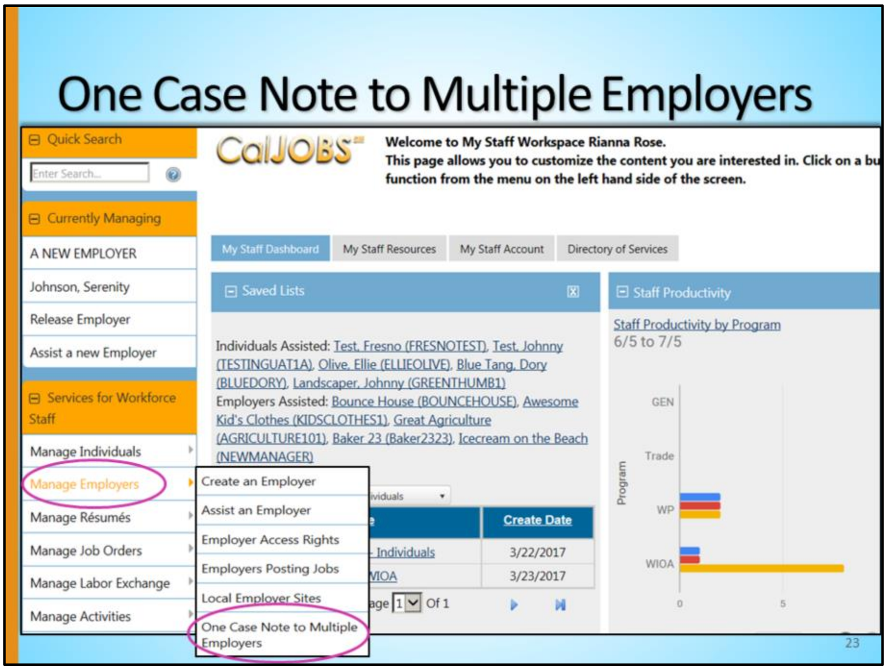
If you would like to create the case note using an existing template, select the appropriate template from the **Autofill by Template** dropdown. Otherwise, create a unique case note by completing the required fields, including the **Case Note Description** area.

Note that there are fields that are not required, but may be completed for a more complete case note. For example, you may attach a document to this case note in the **Case Note Attachment(s)** section, but it is not required.

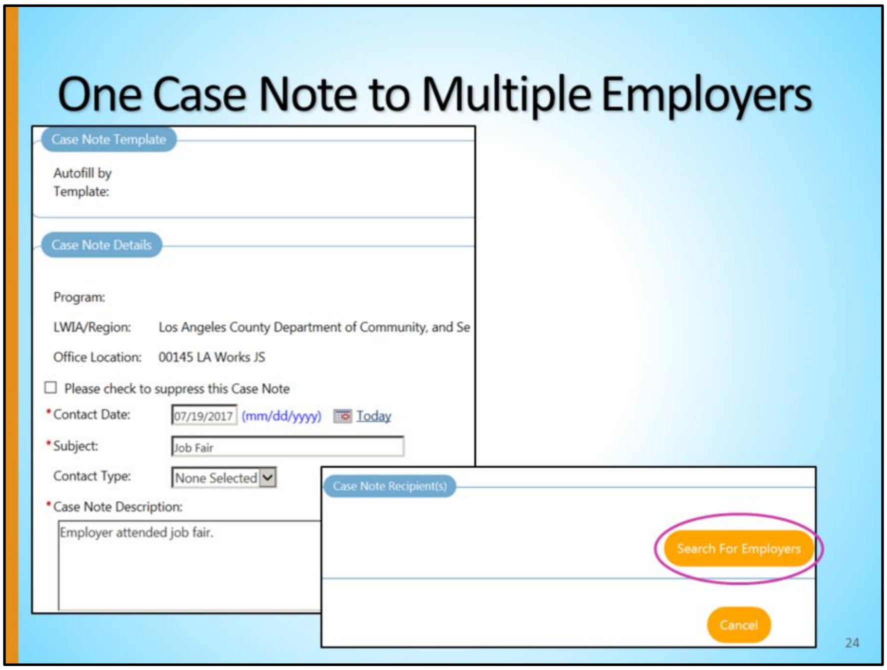
Select the “Save” button when complete.



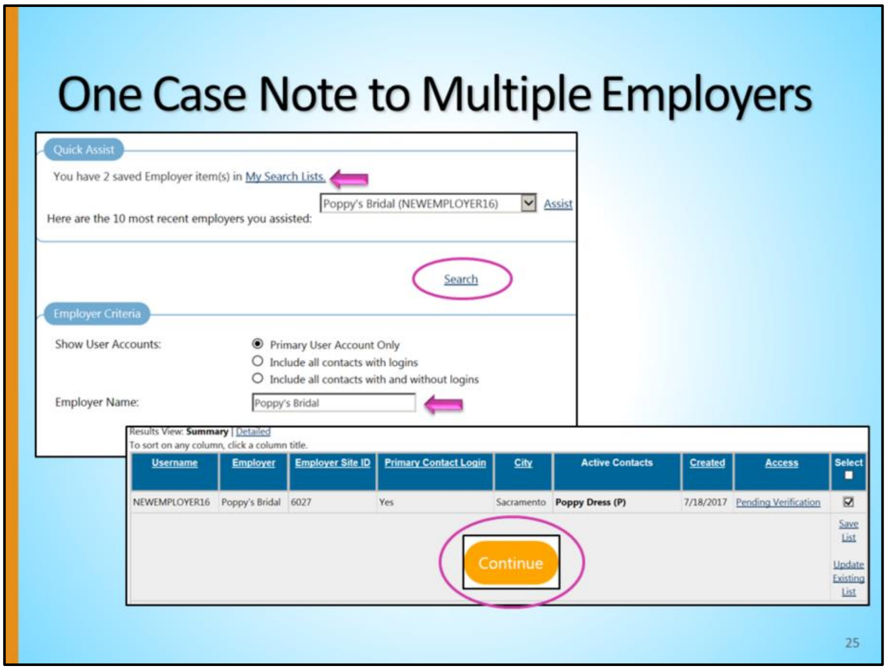
The completed case note will now populate in the **Case Notes** section, with the ability to Edit/Delete (depending on privileges).



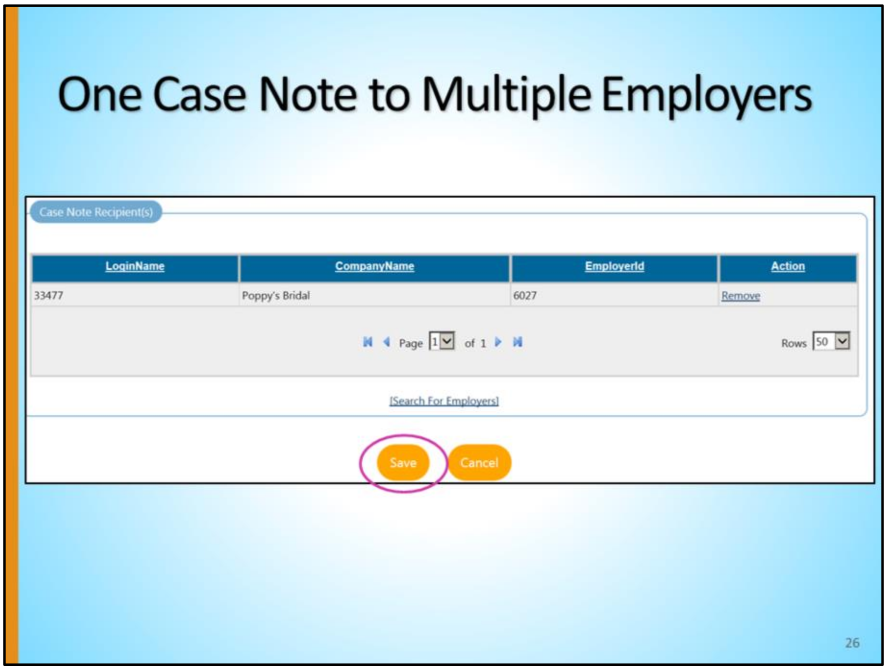
Within **Services for Workforce Staff**, **Manage Employers**, staff can create a case note for multiple employers at the same time by selecting **One Case Note to Multiple Employers**. This saves staff time in cases where they assist multiple employers in the same way. For example, if 10 registered employers in CalJOBS participate in a Local Area job fair, staff can document that all in one.



Complete the required fields including the **Case Note Description** section. Next, select the “Search for Employers” button to choose the appropriate employers.

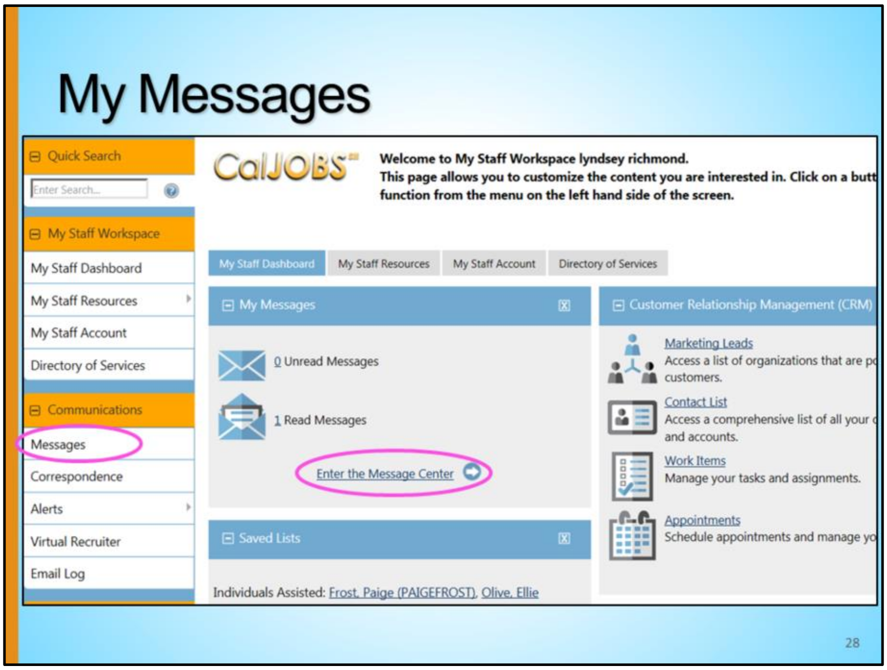


Use the search criteria to search for the employer(s). If you have a saved list of the employers, you can select them from the **Quick Assist** area, <u>My Search Lists</u> link. Otherwise, select the <u>Search</u> link. From the results, mark the box in the **Select** column and then click the “Continue” button.

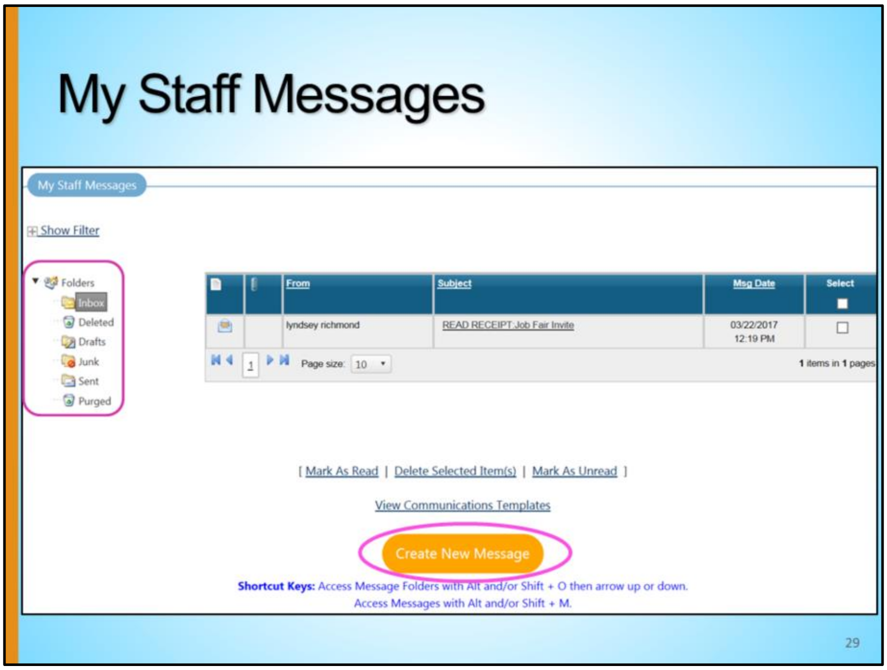


Your chosen employer will now populate in the **Case Note Recipient(s)** table. To add additional employers, select the Search for Employers link. Once you have added all employers, select the “Save” button to finish. The case note will now be added to all of the employer’s profile.

Staff can use the CalJOBS Message Center to send messages regarding topics like job fairs or possible qualified candidates to one or multiple employers.

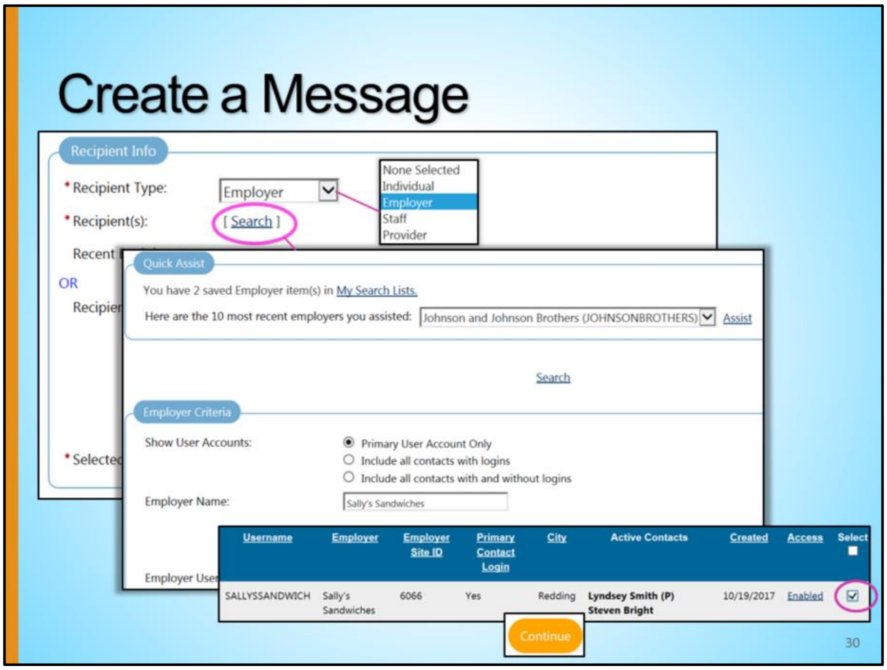


To begin, staff will navigate from the left navigation menu to **Communications** and select **Messages;** another option is to find the dashboard widget, **My Messages**, and select the <u>Enter the Message Center</u> link.



Once you enter the **Message Center**, an area appears with folders to manage your **Messages**. The Inbox folder will default and show any emails located in your inbox.

Select “Create New Message” to send a message.

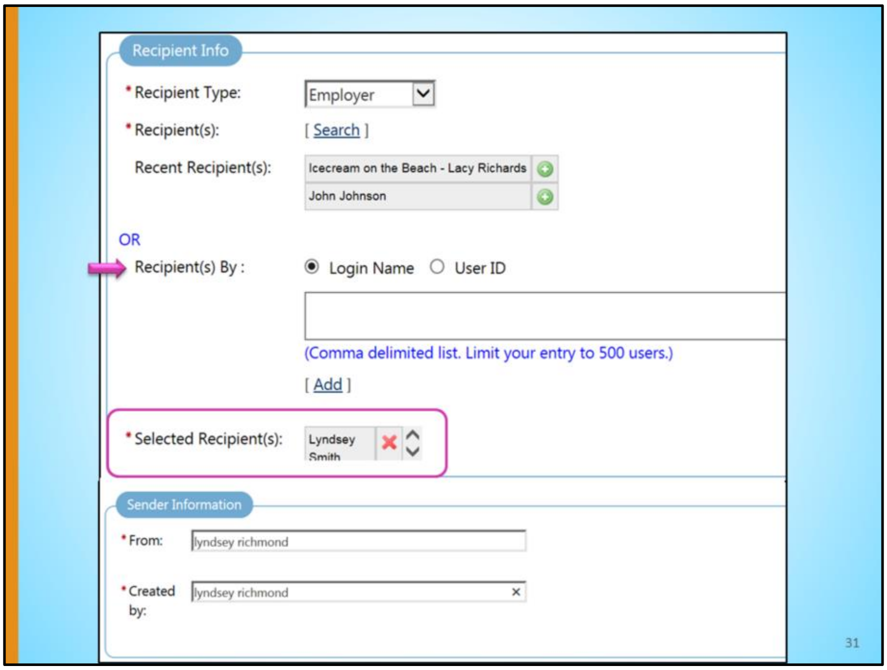


The first section to populate is the **Recipient Info** section. Select a **Recipient Type** from the drop-down list. Notice you can select Individual, Employer, Staff, or Provider- you can correspond with these account types using the message center. Then click the Search link in the **Recipient** field to start choosing which recipients will receive this message. Note that the five most **Recent Recipient(s)** of messages you have sent are also listed. Clicking one of these names will add that user to the **Selected Recipient(s)** field.

Once you select the Search link, you will be directed to a search screen to search for the employer(s) you would like to send the message to. If you have a Search List already created that contains the employers you work with or are on your case load, you can use that Search List to add all or some of those employers. To do this, from the **Quick Assist** section, select the link, My Search Lists. You will be directed to your existing search lists to select from.

If you do not have or would not like to use a Search List, use the **Employer Criteria** section to search for the desired employer. The easiest way to find the employer is to use the Employer User Name, Employer Name, or Contact First and Last Name. Then, select the Search link. Finally, select the box in the “Select” column of the employer you would like to send the message to, and select the “Continue” button.

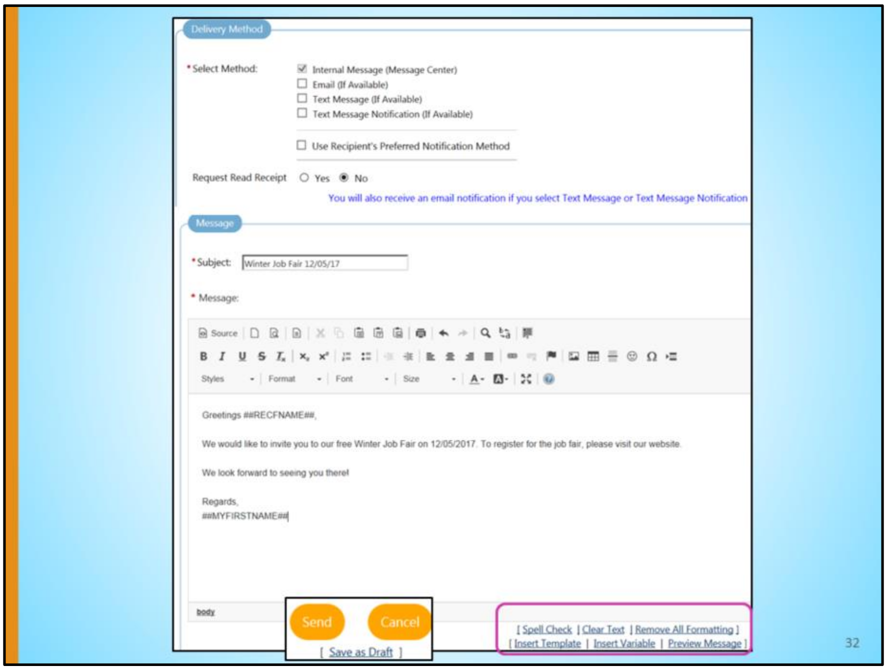
Please note: Do not select the employer from the “10 most recent employer” list. This will bring you to their profile instead of adding them to the message recipient section.



After you select the employer(s) using the Search link, the primary contact name will populate for each employer in the **Selected Recipient(s)** field. To remove the employer from the field, click on the red "X".

In addition, you can search for the employer by using the **Recipient(s) By** option. To use this, enter the employer's Login or User ID and select the Add link. If the information is correct, the primary contact name will populate for each employer in the **Selected Recipient(s)** field.

Next, the **Sender Information** section should contain your name.



Next, in the **Delivery Method** select the method for delivering the message from the available options. By default, the system will send the message through the Internal Message system, but you can also select Email, Text Message, or Text Message Notification if that information is available for your selected recipient(s). In addition, you can request a Read Receipt by selecting the "Yes" radio button.

After recipient(s) have been selected, create a **Subject** title for the message. Type the text for the message itself in the **Message** field. Click the Insert Template link to select from a list of message templates that were previously created by other staff members. If you would like to compose a message that uses insert variables (such as each recipient's first/last names, or address), click the Insert Variable link. Click the Preview Message link to see how the message will look when delivered to your chosen recipients.

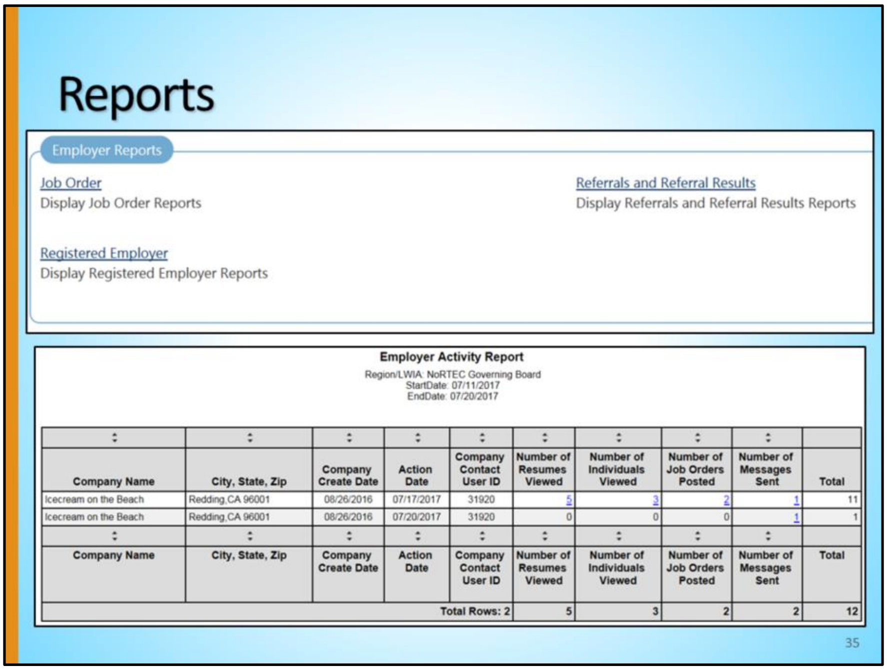
Finally, if you are a staff member sending a message, the system allows you to attach a signature to messages you send through the Message Center. Click the checkbox to enable this feature, then select an Office to use to populate your message signature, if available, from the drop-down list. Messages sent to an individual's email address will automatically include your signature. Also, you can add attachments, such as a flier or other documents, to the message before sending.

When you have finished, click the “Send” button to send your message to your selected recipients. If you do not wish to send the message now, but wish to keep it to send later, click the **Save as Draft** link.

Reports

There are reports within **Reports**, **Detailed Reports**, that offer information on various aspects of employers in CalJOBS. We will highlight the reports in the following three categories:

- Employer Reports
- Services Reports
- Case Management Reports

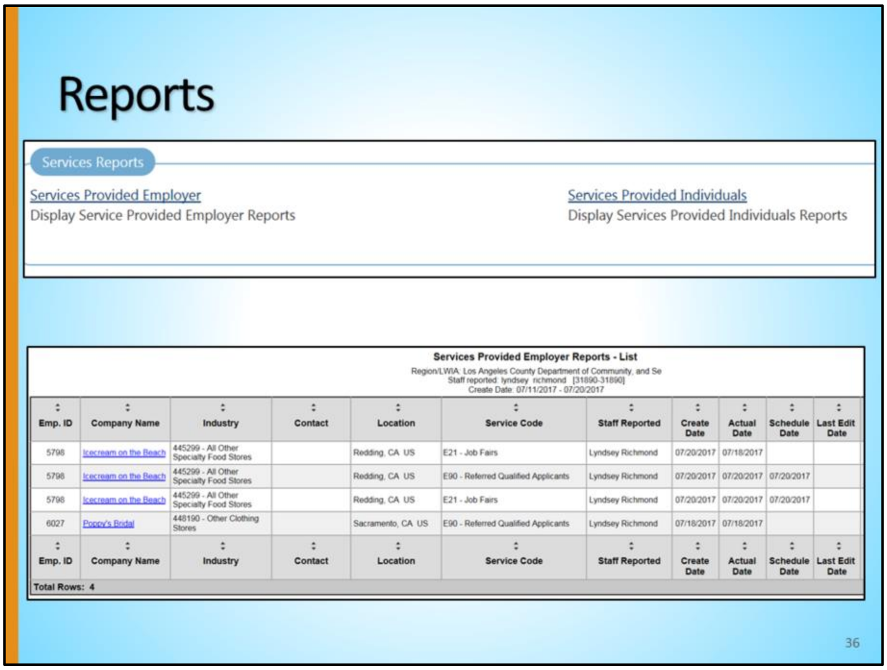


Company Name	City, State, Zip	Company Create Date	Action Date	Company Contact User ID	Number of Resumes Viewed	Number of Individuals Viewed	Number of Job Orders Posted	Number of Messages Sent	Total
Icecream on the Beach	Redding,CA 96001	08/26/2016	07/17/2017	31920	5	3	2	1	11
Icecream on the Beach	Redding,CA 96001	08/26/2016	07/20/2017	31920	0	0	0	1	1
Company Name	City, State, Zip	Company Create Date	Action Date	Company Contact User ID	Number of Resumes Viewed	Number of Individuals Viewed	Number of Job Orders Posted	Number of Messages Sent	Total
				Total Rows: 2	5	3	2	2	12

The reports in the Employer Reports category include Job Order, Registered Employer, and Referrals and Referral Results. Each type of report is data on:

Job Order Reports - These reports document data from job orders created by preferred employers (employers who registered in the system) and external jobs (jobs that were spidered in from other job banks). More data can be collected from internal job orders, but some information can also be gleaned from external job orders.
Registered Employer Reports - These reports cover a large number of sub-categories for filtering to see particular breakdowns (such as by Zip code, county, or number of employees). Most of these categories deal with questions that were asked during the two-page registration form for employers. In addition, these reports document an employer's access rights, whether throughout their history with the system or currently. Lastly, these reports includes a Count of Resume Views, Individual Job Seeker Views, Open Job Orders and Summary Counts of Total Activity between specified dates.
Referrals and Referral Results- These reports list job referrals by region, office, referring staff member, and referral type.

The example on this screen is an Employer Activity report, which can be found within the Registered Employer Reports. The results identify the activity of employers within the 10-day time frame, in the designated LWIA/Region.



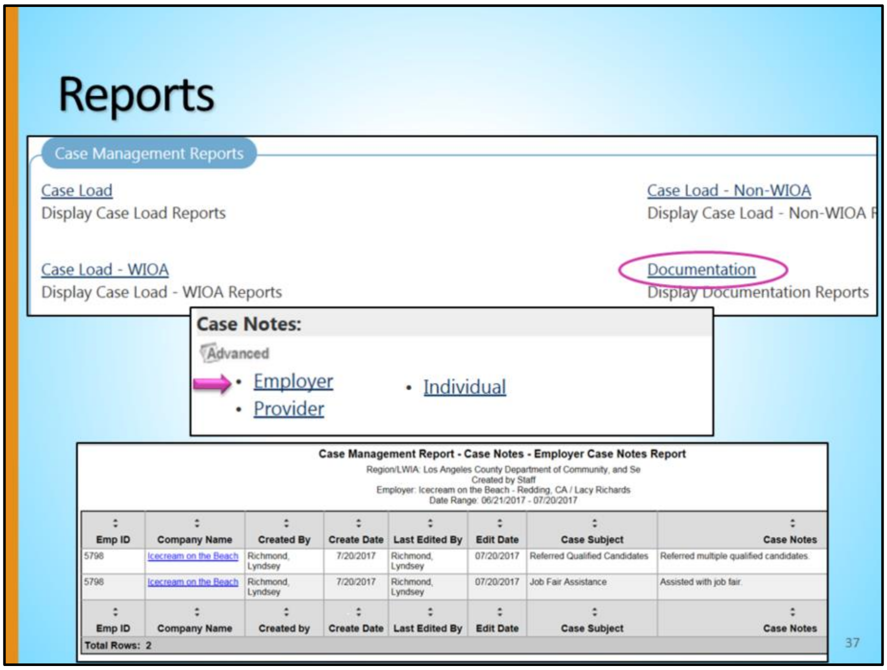
Services Provided Employer Reports - List
Region/LWIA: Los Angeles County Department of Community, and Se
Staff reported: lyndsey richmond [31890-31890]
Create Date: 07/11/2017 - 07/20/2017

Emp. ID	Company Name	Industry	Contact	Location	Service Code	Staff Reported	Create Date	Actual Date	Schedule Date	Last Edit Date
5798	Icecream on the Beach	445299 - All Other Specialty Food Stores		Redding, CA US	E21 - Job Fairs	Lyndsey Richmond	07/20/2017	07/18/2017		
5798	Icecream on the Beach	445299 - All Other Specialty Food Stores		Redding, CA US	E90 - Referred Qualified Applicants	Lyndsey Richmond	07/20/2017	07/20/2017	07/20/2017	
5798	Icecream on the Beach	445299 - All Other Specialty Food Stores		Redding, CA US	E21 - Job Fairs	Lyndsey Richmond	07/20/2017	07/20/2017	07/20/2017	
6027	Poppy's Bridal	448190 - Other Clothing Stores		Sacramento, CA US	E90 - Referred Qualified Applicants	Lyndsey Richmond	07/18/2017	07/18/2017		
Emp. ID	Company Name	Industry	Contact	Location	Service Code	Staff Reported	Create Date	Actual Date	Schedule Date	Last Edit Date

Total Rows: 4

Within the **Services Reports** category, are the Services Provided Employer reports. These reports provide information about the services provided to employers by system staff. Staff can run these reports in a few ways, including by Employer or by Staff, to produce results of activity codes entered for employers.

The example on this screen is a List report within Services Provided Employer reports. It provides a list of all employer activity codes entered by the specific staff member, within the week date range, in the designated LWIA/Region.



Within the Case Management Reports section, staff can utilize the Documentation reports to run case note reports. This report can be used, for example, if staff are entering case notes for an employer and need a list of all case notes they have completed.

The example on this screen is a result of a Case Notes, Employer report. The results identify case notes created by staff for the specific employer (Icecream on the Beach), within the week date range, in the designated LWIA/Region.

For any questions concerning this module, please contact the CalJOBS Education and Development Unit at **CalJOBSTrainingTeam@edd.ca.gov**.

This concludes the training module – Employer Services Part II