Overview:
The employer services module is used to add and maintain employer data and services. Employers are added as customers of employer services staff (TMS, BAS, BWC, JD) to document contact and services provided.

Searching for an existing employer:
There are multiple ways to search for an employer.
- Click on the Employer Services tab and then Employer Maintenance.
- The employer list shows the employer number, the BAS name (which can be clicked to obtain contact information), the BWC Name if assigned, employer name, address, and phone. You can search by employer name, employer number, or employer phone number:

  - **Employer Name** can be searched by typing in all or part of the name.
    - The checkbox labeled "embedded" will change how the text is used in the search function.
    - If the embedded box is checked, the search will look for the existence of the input text anywhere in the employer name field. Example: Regional is input…the result would return Fresno Regional Workforce…
    - If the embedded text box is not checked, the search will look for the input text from the beginning of the employer name forward. Example: Regional is input…the result would return Regional Aircraft, but not Fresno Regional…
  - **Employer Number** can be searched by inputting the employer number, if known.
  - **Employer Phone Number** Must use XXX-XXX-XXXX format.

- To avoid duplications, do the embedded search when preparing to input a new employer to make sure the employer record doesn't exist.
- If employer maintenance is to be performed, click on the linked employer name to access the employer maintenance screen.

Adding a new employer:
- From the search screen, click on Add New Employer link at the bottom of the page.
- The Company Information contains the data for the employer. Note – employer records are location specific.
- The red asterisks represent required fields.
- **CalJOBS User Name** – This is the CalJOBS username of the employer. This is necessary if any CalJOBS services are provided. See the section below for searching for an employer on CalJOBS.
- Main Location check box – check if multiple locations will be input. If not, then leave unchecked.
- Name – input the name of the employer – 50 characters long and then the name is truncated.
- FEIN – input if available.
- Years in Business – input a number.
- No Assigned BAS StaffID – this field defaults to the staff ID of the user inputting the new employer. The staff ID of the BAS who is to be assigned the employer must be input here and must exist.
- **BWC Staff ID** – this id is for the FRWDB BWC if assigned to the employer. This ID "overrides" the BAS staff in reports.

- Street – input the numbers and street name.
- City – input the city.
- St – input the state.
- Zip – input the zip.
- Country is defaulted to US.
- Check if Mailing Address is the same… check box – check the box if the mailing address is the same as the physical address.
- Main Phone and Ext – input the phone number and extension, if applicable.
- Num. of Employees FT & PT – a number is required to be input for each, full time or part time, if none, input zero ("0").
- Web Site – input the website of the employer.
- Organizational Structure – chose one of the types if known.
- WIB Industry – choose the appropriate WIB defined industry. If not one of the choices, then select Other and input the name of the industry in the text box.
- NAICS Code – Click on the NAICS Code button. The initial industries presented are based on the WIB industry. If the most appropriate choice isn't available, then use the search function to locate one. Click on the chosen industry to input the NAICS code. Use the Reset Button to clear the field.
- Click on Update Employer button to save the new employer data and generate an employer number. Error messages may be displayed at this time. Correct any problems and click the button again. The screen will be refreshed and the employer number will show at the top of the screen. Additionally, the BAS name will be displayed. Confirm it is correct. If not, correct the assigned BAS staff ID and click the Update Employer button. Do not click on the other buttons before clicking on Add Employer as all input data will be discarded.

Employer Maintenance
- After a new employer has been input or after finding an employer on the list, employer data can be maintained.
- Each field can be update/changed only by staff who are at the same location as the staff who input the record.
- There are a number of buttons at the bottom of the Company Information screen
  - Update Employer – this saves the changed employer data.
  - Add Employer Location – visible only if Main Location is selected.
  - Employer List – takes you back to the employer search list.
  - Employer Services – takes you to the employer services screen.
  - Notes – takes you to the employer case notes screen.
  - **Document Contact** – This provides a way to document that a contact was made to the employer but not using a formal know contact that has been input in the Company Contacts.

Employer Locations
- If Main Location is checked the Add Employer Location button is visible. Click on this button to add a location.
- Adding an employer location is the same process as adding a new employer.
- To get back to the Main Location employer maintenance screen, click on the Main Location button above the data fields.
- The most significant difference is that you cannot select Main Location on an employer who is

input via the Add Location screen.
- An employer who has been added as a location to a Main Location is an employer record that is tied to the Main Location for reporting and tracking purposes.
- The additional employer locations are listed, and re accessible, at the bottom of the employer maintenance screen.

Employer Services
- Clicking on the Employer Services button opens the Employer Services screen. This is the same screen that can be accessed from the Employer Services tab.
- Choose the service provided from the drop-down list.
- Input the date the service began.
- Input the date the service ended.
- Click on Add New Services.
- A service may only be edited to add the CalJOBS entry date. Note – changes are recorded with the time/date and the user who made the changes.
- Click on the Employer Name button to go back to the employer maintenance screen.

Company Contacts
- Click on Add New Employer Contact to add a contact.
- Input data into the appropriate fields.
- Purpose - select the most appropriate reason for the contact from the drop down or select Other and input text into the Other Purpose field. Only one choice is available.
- Do you want this contact…Check this box if this contact is to be added to the e-mail list for WIB communication.
- Click Add New Employer Contact to add the contact.
- To modify an existing contact, click on the bar with the contact information. The screen drops open and you may modify existing fields and then click Update Contact to update the contact.
- Notes may be input from the Notes button.

Employer Needs is now Job Order
- Click on Add New Job Order to add a Job Order
- Job Title – input the employer's job title.
- ONET – click on this button to search and select the most appropriate ONET code for this job title.
- Quantity – input the number needed or affected.
- Date Needed – input the date needed. Cannot be more than 90 days.
- Job Order Type – Select the appropriate type
    - Blind – a job order where the employer is anonymous **REMOVE**
    - WFC – choose this if the job order is to be filled by Workforce Connection staff
    - Unsolicited – this is a job order that is created without interaction with the employer
- Job Description – input a text description of what the job entails, if appropriate. This is limited text (500 characters) so just document the most important information.
- Comments – Add any comments related to this need. This is also limited to 500 characters.
- Until Filled or Recurring buttons – Click these as appropriate.
    - Until Filled means that job order doesn't have a locked in due date.
    - Recurring means that the job order is recurring and essentially remains. Hire records may exceed the quantity.

- o On both of these the due date should be updated so the job order isn't forgotten. If the job order is no longer needed it should be completed at some point.
- Input the hourly salary range as $xx.xx
- When a job order has been created it can be updated by clicking on the arrow.
- Click Hire to open the screen to document a hire
    - o Input the date and number hired.
    - o The field remaining on job order is updated as positions are hired.
- If something is changed on the job order, click Update Job Order
- Close the job order by inputting the date closed and the result.
    - o Date closed cannot be more than 90 days back and not a future date.
    - o There is validation tied to the result and the quantity.
        - Completed – remaining on Job Order must be 0
        - Referred to partner Agency – Remaining on Job Order isn't checked
        - Unable to fill – Remaining on Job order must the same as quantity
        - Partially Completed – Remaining on job order must be less than quantity and more than 0.
        - Recurring Hire only can be used if recurring.

CalJOBS Employer Services
- To locate an employer in CalJOBS search on the employer name for our area.
    - o Choose both Marketing Lead and Recruiting as the employer type
    - o You may find duplicates. See which are active and created most recently.
    - o Check the locations to see if the Primary Location is the location which applies to the services you are providing.
        - If not, add a location to the employer for this purpose.
- To add an employer
    - o Add the employer as a Recruiting Services Employer for this purpose.
    - o You must have the EDD Account number to create the employer on CalJOBS
        - If the employer doesn't know this number it can be found on their DE9 or DE2088 forms. They can also call EDD Taxpayer Assistance at 888-745-3886 to obtain the number.
- The CalJOBS username is necessary to upload the services into CalJOBS from I-Train
    - o Document the username and input it into I-Train