San Diego Workforce Partnership

Partner Portal User Guide

Introduction

Welcome to the Partner Portal! This is a community of partners, hosted by the San Diego Workforce Partnership, that is open to members of the business services collaborative and other selected partners who share the goal of connecting job seekers with employers in the Southern Border Region of San Diego. Here are some key functions of the Partner Portal:

1. Share job postings.
2. Refer candidates to jobs.
3. Share events and track RSVP and attendance.
4. Collaborate with partners on areas such as resources, best practices, and employer engagement.

These functions allow us to improve our efficiency in the following ways:

1. Access a larger candidate pool.
2. Move from email communications to structured referral processes that promote better visibility and collaboration.
3. Track referrals and outcomes at the individual and team level.
4. Increase market penetration as we spend less time engaging the same employers and gain better insights into our current trends in industries and populations served as a collective group.

The following materials will serve as a guide to help you navigate this new system, so please feel free to use this as reference. If you have a question about a business process, we encourage you to ask a question on the community (see the *Support section)* so that others in the community who may have the same question can benefit from the answers you receive. If you have a technical error and would like to contact our Salesforce support team, please feel free to either submit a support ticket (see the *Support* section) or email SalesforceSupport@workforce.org.

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Getting Started

In order to log in to the Partner Portal, please navigate to https://sdwp-jobs.force.com/Partner/. You will enter your username and password and click the ***Log in*** button to access the site.

If you do not currently have login credentials, please click the link that says ***Need an account? Request one here!*** This will submit a request for an account to the San Diego Workforce Partnership for review, which should be completed within 10 business days. If you have not received instructions on next steps for accessing the Partner Portal after this time, please contact Business@workforce.org to verify the status of your request.

If you forget your password, you can click the ***Forgot your password?*** link to have Salesforce send you a self-service link to reset your password. If you do not receive this email within 10 minutes of submitting the request for a reset link, then you either do not have an active account or there is a technical error. For help troubleshooting this error, please email technical support at SalesforceSupport@workforce.org and describe the issue you are experiencing.

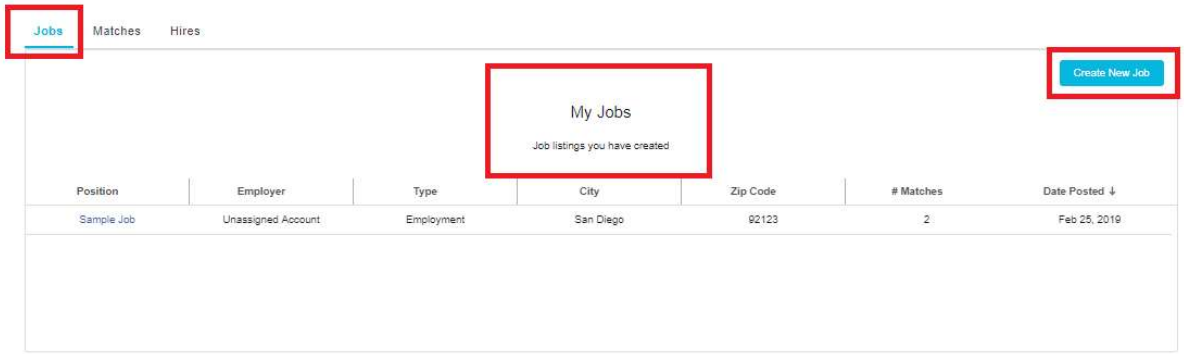
Jobs

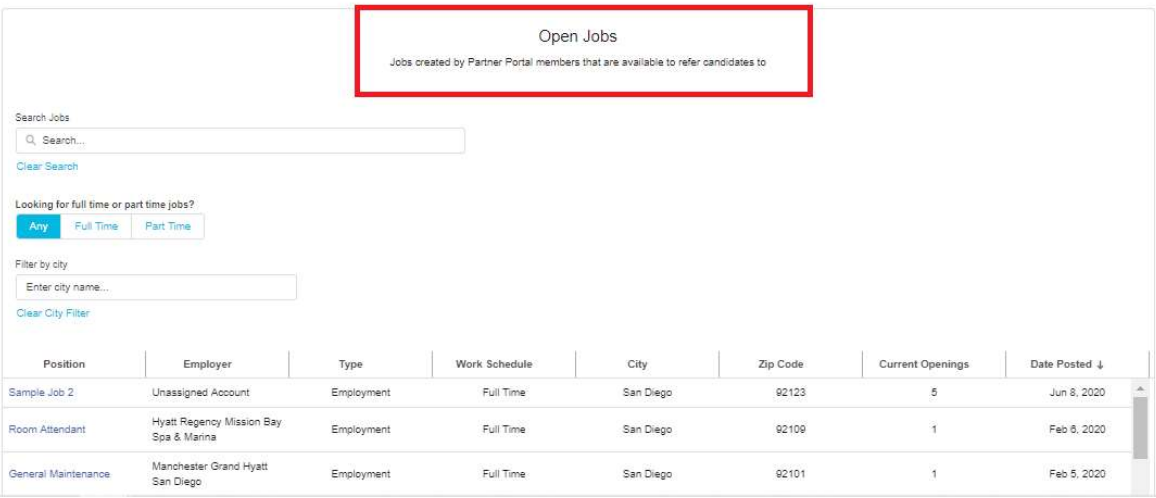
Viewing Open Jobs

In order to create or view Jobs on the Partner Portal, you must navigate to the ***Jobs*** tab using the navigation menu.

Once you have navigated to the Jobs page, the first tab, ***Jobs***, will be selected by default. In this tab you will see:

1. **My Jobs** – A list of jobs you have created. At the top-right corner of this list is the *Create New Job* button, which you can click to create new job listings.
2. **Open Jobs** – A list of jobs that have been posted by partners and are accepting applications for referral.



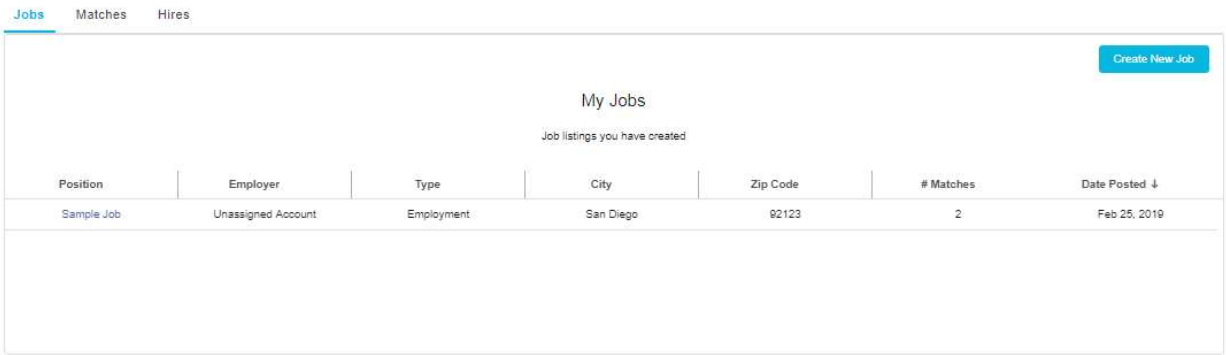


My Jobs

In the ***My Jobs*** list, you will see Job listings you have personally created. This list has the following columns:

- Position – title of the job and a link to the job listing details.
- Employer
- Type – description of the nature of employment. Options are:
  - Employment (sometimes AKA regular employment)
  - Apprenticeship
  - Independent Contractor (1099)
  - Internship-Paid
  - Internship-Unpaid
  - Externship
  - Undisclosed
- City
- Zip code
- # Matches – this is the total number of candidates who have been referred to this position in the Partner Portal.
- Date Posted – this is the date that the job listing was created.

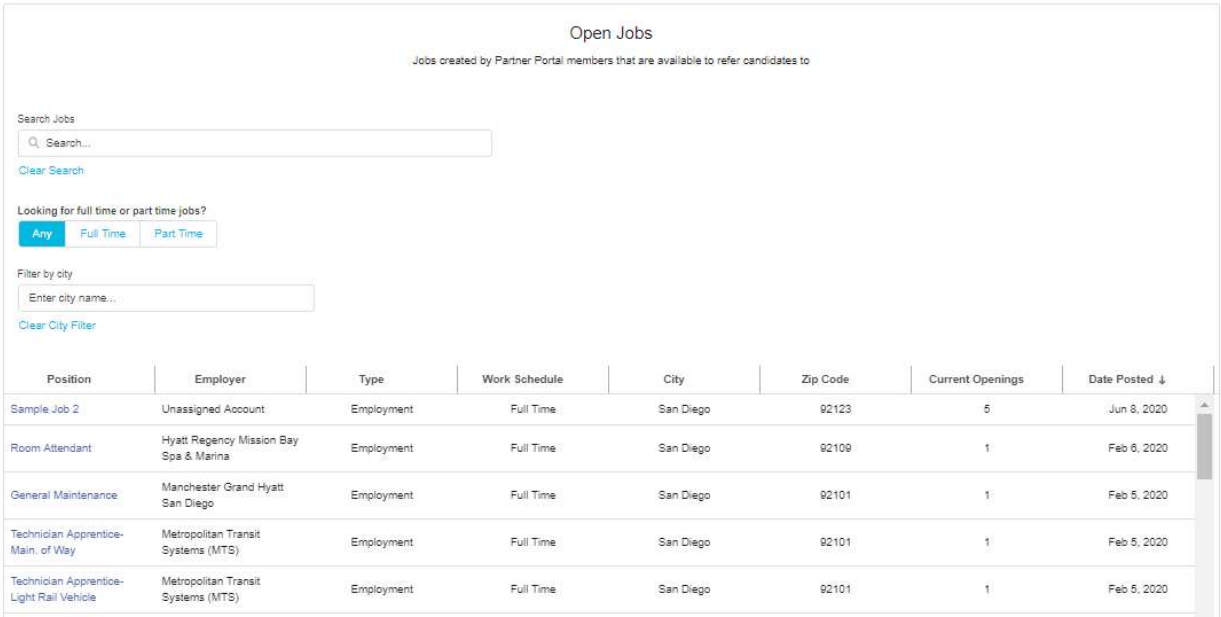
<u>Please Note:</u> If the *My Jobs* list is empty, then that means you have not yet created any job records.



Open Jobs

In the ***Open Jobs*** list, you will see Job listings that have been created by Partner Portal members (including yourself) that have a status of Open, meaning that they are available for partners to refer their candidates to. This list has the following columns:

- Position – title of the job and a link to the job listing details.
- Employer
- Type – description of the nature of employment. Options are:
  - Employment (sometimes AKA regular employment)
  - Apprenticeship
  - Independent Contractor (1099)
  - Internship-Paid
  - Internship-Unpaid
  - Externship
  - Undisclosed
- Work Schedule – whether the job is full time, part time, or both.
- City
- Zip code
- Current Openings – this is the maximum number of candidates that can be hired for the listed job.
- Date Posted – this is the date that the job listing was created.

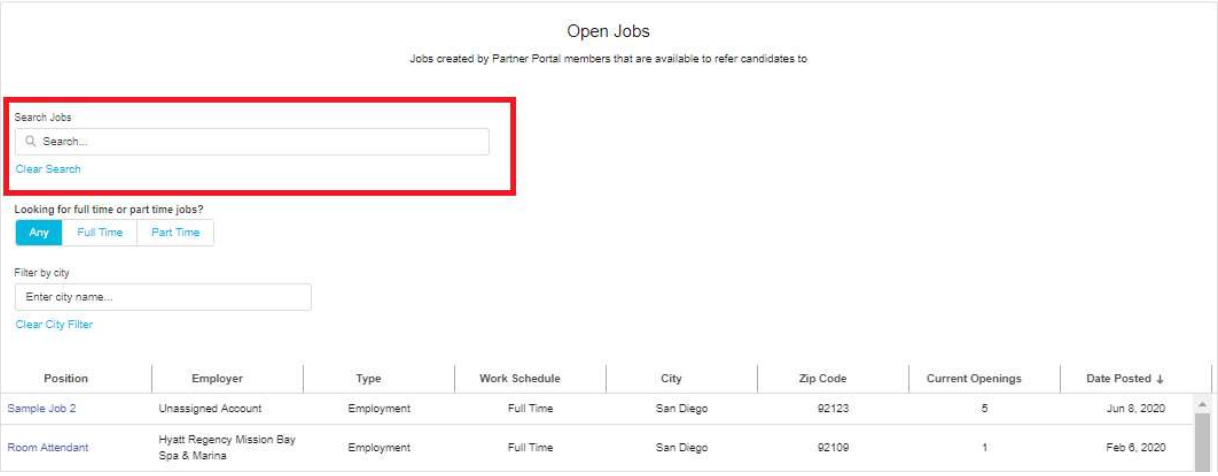


Position	Employer	Type	Work Schedule	City	Zip Code	Current Openings	Date Posted ↓
Sample Job 2	Unassigned Account	Employment	Full Time	San Diego	92123	5	Jun 8, 2020
Room Attendant	Hyatt Regency Mission Bay Spa & Marina	Employment	Full Time	San Diego	92109	1	Feb 6, 2020
General Maintenance	Manchester Grand Hyatt San Diego	Employment	Full Time	San Diego	92101	1	Feb 5, 2020
Technician Apprentice-Main. of Way	Metropolitan Transit Systems (MTS)	Employment	Full Time	San Diego	92101	1	Feb 5, 2020
Technician Apprentice-Light Rail Vehicle	Metropolitan Transit Systems (MTS)	Employment	Full Time	San Diego	92101	1	Feb 5, 2020

Search Jobs

In order to search for a job record, you can use the search bar at the top of the ***Open Jobs*** list. Simply enter a job title, employer name, zip code, or any other information available on the job record and hit enter to get a list of matching records.

In order to clear the search results, click on the *Clear Search* link beneath the search bar.



Filter Jobs

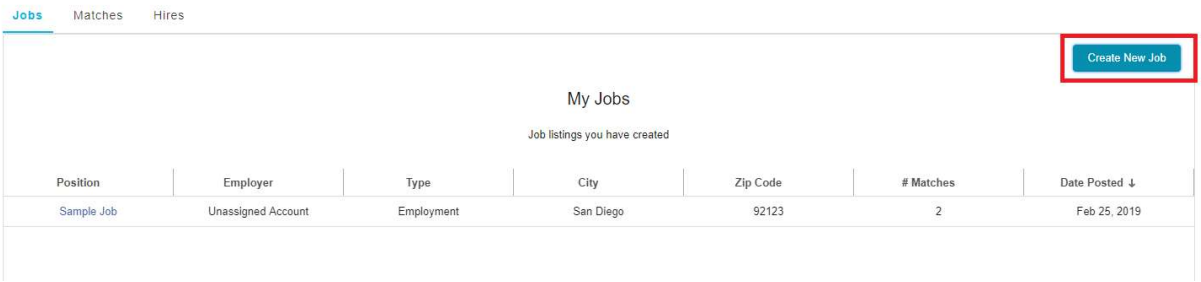
In addition to searching the ***Open Jobs*** list for key terms, you can also filter the list based on:

- Work Schedule – using this filter returns all results that include what you enter (i.e. if you select “Full Time,” it will return jobs that are listed as either “Full Time” or “Full Time and Part Time.”
    - Full Time
    - Part Time
- City – results will include any job listing where the City field contains what you enter (i.e. if you enter “Vista” as your city filter, it will return results for both Vista and Chula Vista).

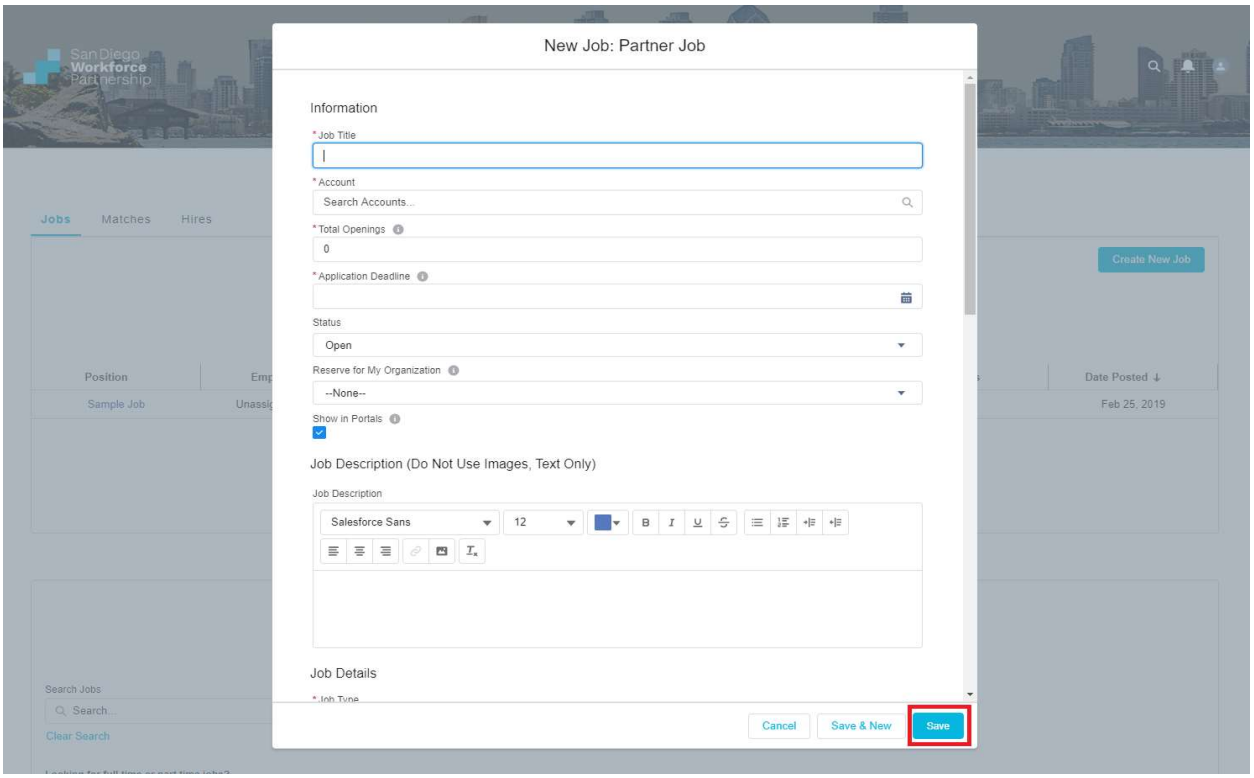
Note: You can use a combination of the search bar and any of the filters, and all that are selected will be applied.

Creating New Job Records

In order to create a new Job record, navigate to the ***Jobs*** page. Click on the button labeled ***Create New Job*** at the top right of ***My Jobs*** list, as shown below.



Once you click the button, a window will open that allows you to enter information to create a new job listing. Required fields are marked with a red asterisk (*) to the left of the field name, as show in the image below. **It is important that you follow our [guidelines]() during this process**. Once you are finished entering your job details, click ***Save***.



Job Fields

The fields that you are required to fill in order to save a new job listing are:

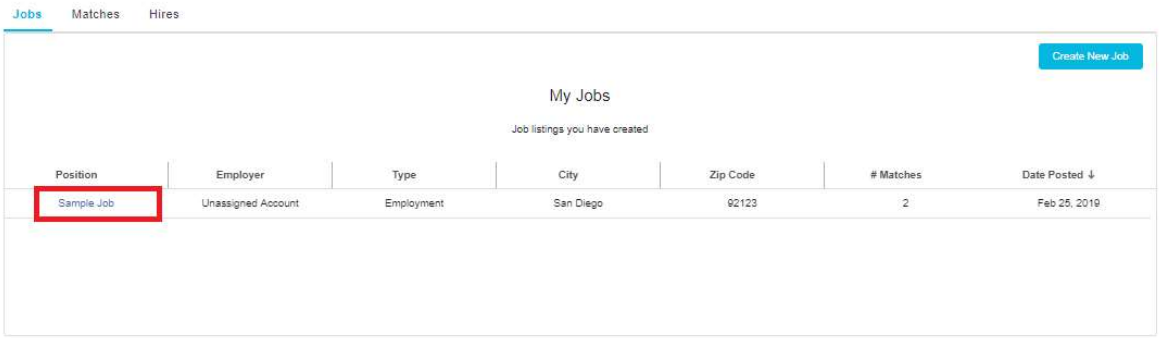
1. Information
    a. Job Title
    b. Account (AKA employer)
        i. **Note:** Try searching our database for existing businesses!
        ii. If unable to find a matching employer in our database, then click on "+ New Account" to create a new employer record.
    c. Total Openings
        i. This is the maximum number of candidates that can be hired for this job.
    d. Application Deadline
        i. This is the last day that partners have to refer their candidates before the job listing is **automatically removed** from the list of *Open Jobs* on the Partner Portal.
    e. Status
        i. Reserved – The job is reserved to only be shown to partners who work at the same organization as the individual who created the job listing, and it is only shown to job seekers in the Career Portal who are managed by an individual at that organization.
            1. This status will automatically be selected if any value is selected in the field below, *Reserve for My Organization*.
        ii. Open – The job is available for partners to refer their candidates to, and if *Show in Portals* is checked, this job will be visible to all members of both the Partner Portal and the Career Portal.
        iii. Closed – The job is not available for partners to refer their candidates to and will not be seen in the Partner Portal or Career Portal job lists.
    f. Reserve for My Organization
        i. Can select 3, 5, or 7 days, or an unlimited duration, to only show this job to individuals at your own organization and the job seekers that they manage.
        ii. Upon selecting any of these values, the *Status* of the job will be changed to reserved. At the end of the duration, the *Status* of the job will automatically update to "Open."
    g. Show in Portals
        i. Check this box to show this job to partners on the Partner Portal and job seekers on the Career Portal.

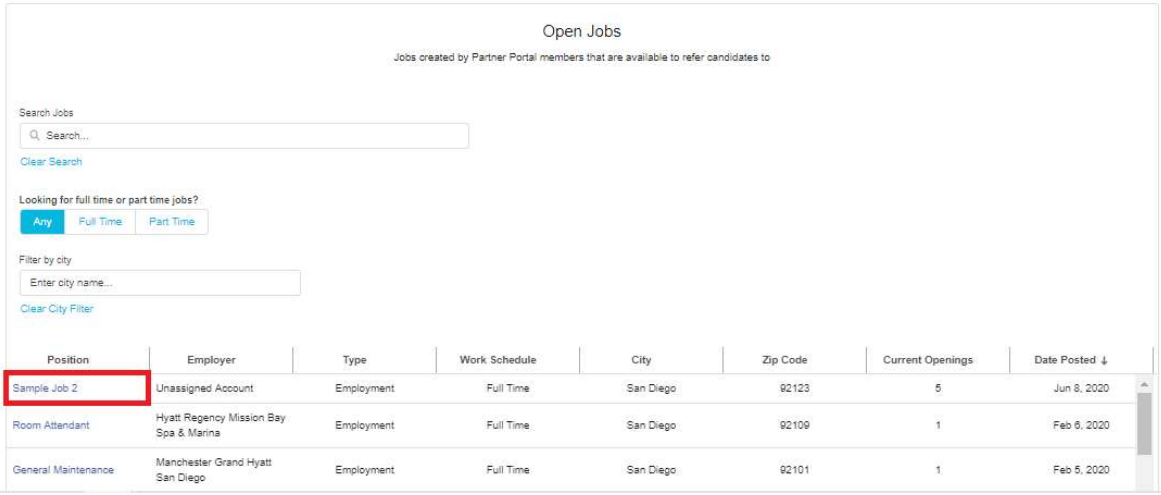
        ii. **Note**: you can only check this box if the *Status* of the job is “Open” or “Reserved” and the *Application Deadline* is set for a future date. If any of these conditions are not met, this checkbox will remain unchecked, as we will not show closed jobs or jobs that are past their listed application deadline on our portal sites.

2. Job Description
3. Job Details
    a. Job Type
    b. Position Duration
    c. Full Time / Part Time
    d. Hours Per Week
    e. Hourly Wage Minimum
    f. Hourly Wage Maximum
    g. Maximum Annual Salary
        i. Only fill this out if hourly wage information is unavailable.
4. Address Information
    a. Street, City, State, Zip Code, and Country where the job will be located.
    b. If this is a position that does not have a single, permanent location, then enter the *Job Street Address* as “Various.”
5. Candidate Considerations
    a. Career Level
    b. Education Required
    c. Years Experience
6. Additional Comments
    a. These may include instructions or best practices for partners who are referring their clients to this job. If none, then leave blank.

Viewing Job Details

In order to open one of these Job records, click on the linked job title in the *Position* column.

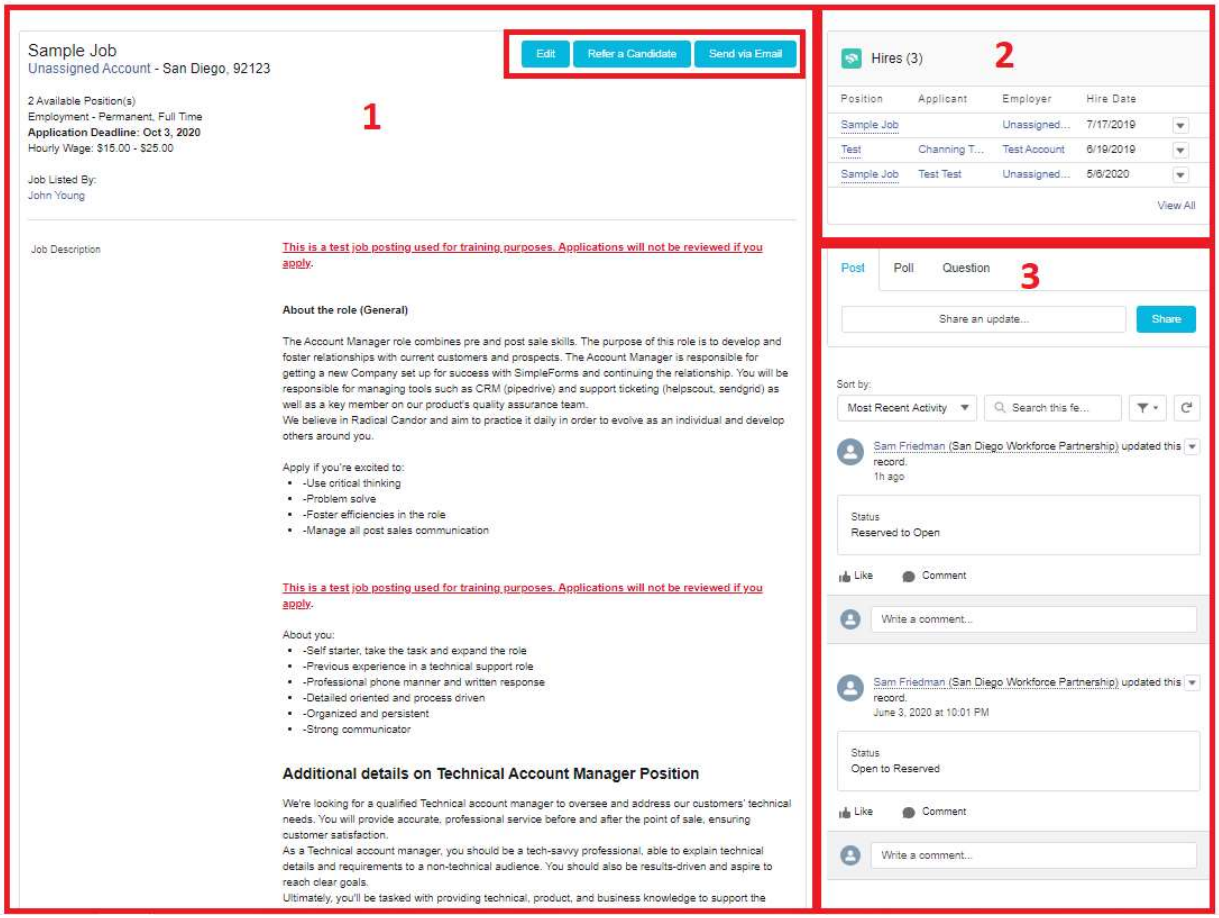




After clicking on the *Position,* it will display the *Job Details* page, which includes:

1. Job listing details and action buttons
    a. Edit – opens up a window to edit the details of the job listing.
        i. **Note**: Edit is only available on your own job listings.
    b. Refer a Candidate – opens a form to refer a candidate to the job listed.
    c. Send via Email – opens a form asking for an email address. Upon completing this form, a the details of the current job listing will be emailed to whatever email address is entered here.
2. Any individuals who have already been hired for the current job listing.
3. The record level Chatter feed for the current Job record, where you can collaborate with other members of the Partner Portal and ask questions related to the job listing.
    a. **Note**: Chatter is visible to all members of the Partner Portal who view the job listing.

Job Details



Matches

A Match is a record of your referral of a candidate to a job. Matches can be created in 3 different ways:

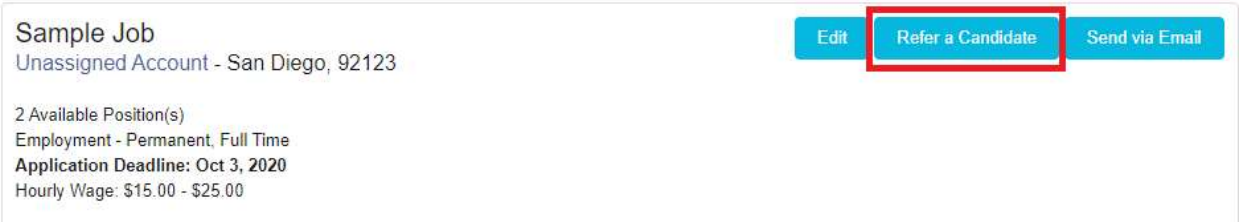
1. Partner Portal Referral
    a. A partner refers a candidate to a job listing in the Partner Portal.
2. Career Portal Self-Referral
    a. A job seeker refers themselves to a job listing in the Career Portal.
3. San Diego Workforce Partnership Staff
    a. A staff member of the San Diego Workforce Partnership refers a candidate to a job listing in Salesforce, the CRM database that holds all Partner Portal and Career Portal data.

As a Partner Portal member, you are only able to refer a candidate through the first method listed above, but it is important these other methods for creating Matches in order to better understand the Match process.

Refer Your Candidate to a Job

In order to refer one of your candidates to a job:

1. Open the **Job record** that you want to refer your candidate to.
2. Click the **Refer a Candidate** button at the top right of the record.



3. Fill in the required information
    1. Reason for Referral – this should explain why you feel your candidate is well suited to this particular job.
4. Upload your candidate's resume (if you don't have it, you can upload it later).
5. Click finish to complete the process.

Match Process

When a Match record is created by referring your candidate, it will automatically enter an approval process (shown on the next page). For each step of this process, the assigned individual, or *approver*, must **approve** the candidate in order for the Match to continue to the next step. If the approver rejects the record, the process will end and the status of the Match will be moved to "Not Hired," which signifies that the candidate was not hired for the position. Here are the approval process steps and what they mean:

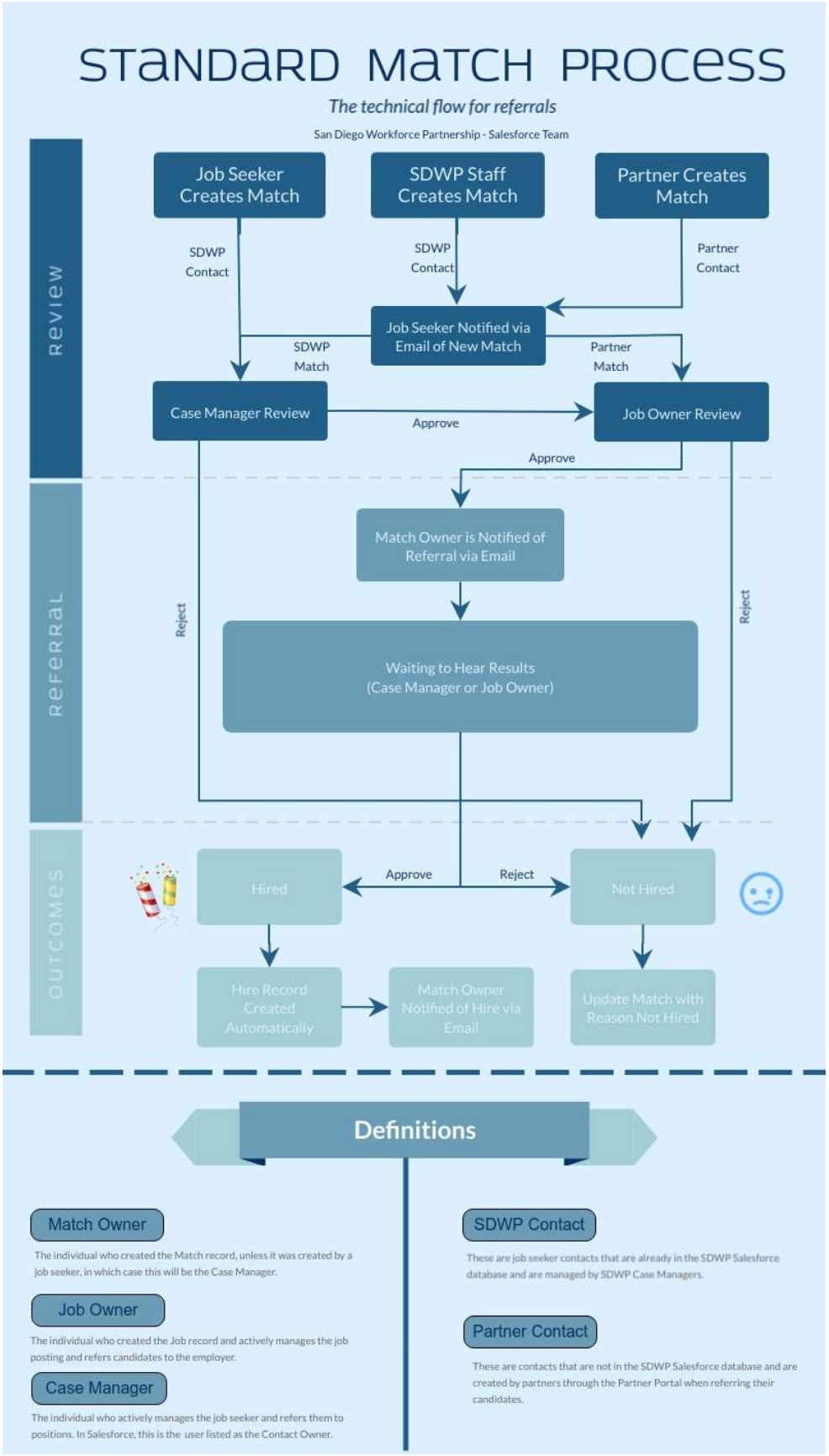
1. Case Manager Review – Matches created on the Partner Portal will not Only applicable when SDWP staff create a match or if a job seeker creates a match through the Career Portal.
2. Job Owner Review – The job owner is listed on the job record and is the individual who created the job record by default. This person will review all matches for their job and will choose which candidates to refer to the employer.
3. Waiting to Hear Results – This status applies to both the case manager and job owner, either of which may approve a record in this stage based on whoever hears whether or not the candidate was hired or not.
4. Hired – This status reflects that the candidate was hired, and a ***Hire*** record will automatically be generated and linked to the ***Match*** record when this status is reached.
5. Not Hired – This status reflects that the candidate was not hired, and the match owner will be encouraged to update the Match with more information on the reason they were not hired in the *Reason Match Closed* field.

Approval Actions

Approve: This means that the candidate will move to the next status in the approval process.

Reject: This means that the candidate will not move forward in the hiring process and the Match will reflect the *Not Hired* status.

**In the approval email you receive as the assigned approver for a Match, detailed instructions will be provided concerning each of these statuses and what actions you are expected to take.


STANDARD MATCH PROCESS
The technical flow for referrals
San Diego Workforce Partnership - Salesforce Team
REVIEW
Job Seeker Creates Match
SDWP Staff Creates Match
Partner Creates Match
SDWP Contact
SDWP Contact
Partner Contact
Job Seeker Notified via Email of New Match
SDWP Match
Partner Match
Case Manager Review
Approve
Job Owner Review
Approve
REFERRAL
Match Owner is Notified of Referral via Email
Reject
Reject
Waiting to Hear Results (Case Manager or Job Owner)
OUTCOMES
Hired
Approve
Reject
Not Hired
Hire Record Created Automatically
Match Owner Notified of Hire via Email
Update Match with Reason Not Hired
Definitions
Match Owner
The individual who created the Match record, unless it was created by a job seeker, in which case this will be the Case Manager.
Job Owner
The individual who created the Job record and actively manages the job posting and refers candidates to the employer.
Case Manager
The individual who actively manages the job seeker and refers them to positions. In Salesforce, this is the user listed as the Contact Owner.
SDWP Contact
These are job seeker contacts that are already in the SDWP Salesforce database and are managed by SDWP Case Managers.
Partner Contact
These are contacts that are not in the SDWP Salesforce database and are created by partners through the Partner Portal when referring their candidates.

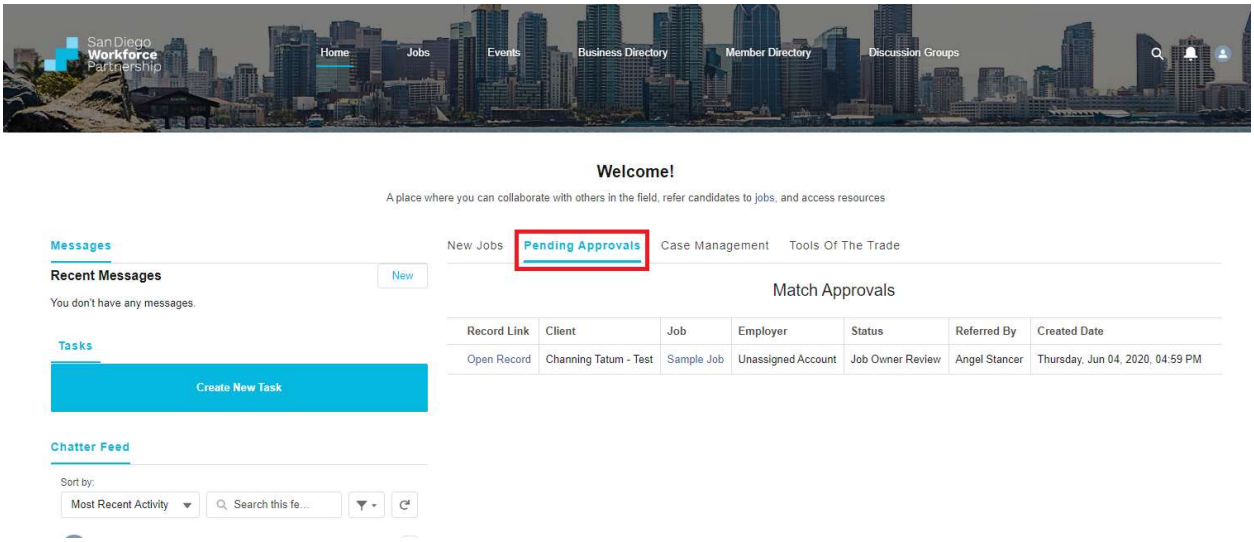
Email Notifications

There are several email notifications associated with this process that are sent automatically based on whether the Match record is approved or rejected. These are listed below and are also reflected on the flow chart on the previous page.

- Approver Email: This is sent to whoever the assigned approver is for a certain approval process step (see above for the 5 steps in this process).
- Match Owner Notification: The Match Owner, who is usually the individual who created the Match, will be notified:
    - When the candidate has been referred to the employer.
        - This occurs when the Job Owner approves the Match and it moves to Waiting to Hear Results.
    - When the candidate has been hired.
- Job Seeker Notification: The job seeker will be emailed when the Match is first created (at the email address you provided when creating the Match) to let them know that they have a new Match.

Managing Your Pending Approval Requests

It is possible that you may receive multiple approval requests for Matches if you have listed a job on the Partner Portal. In order to track all of your pending approvals, navigate to the ***Home*** page and click on the “Pending Approvals” tab.

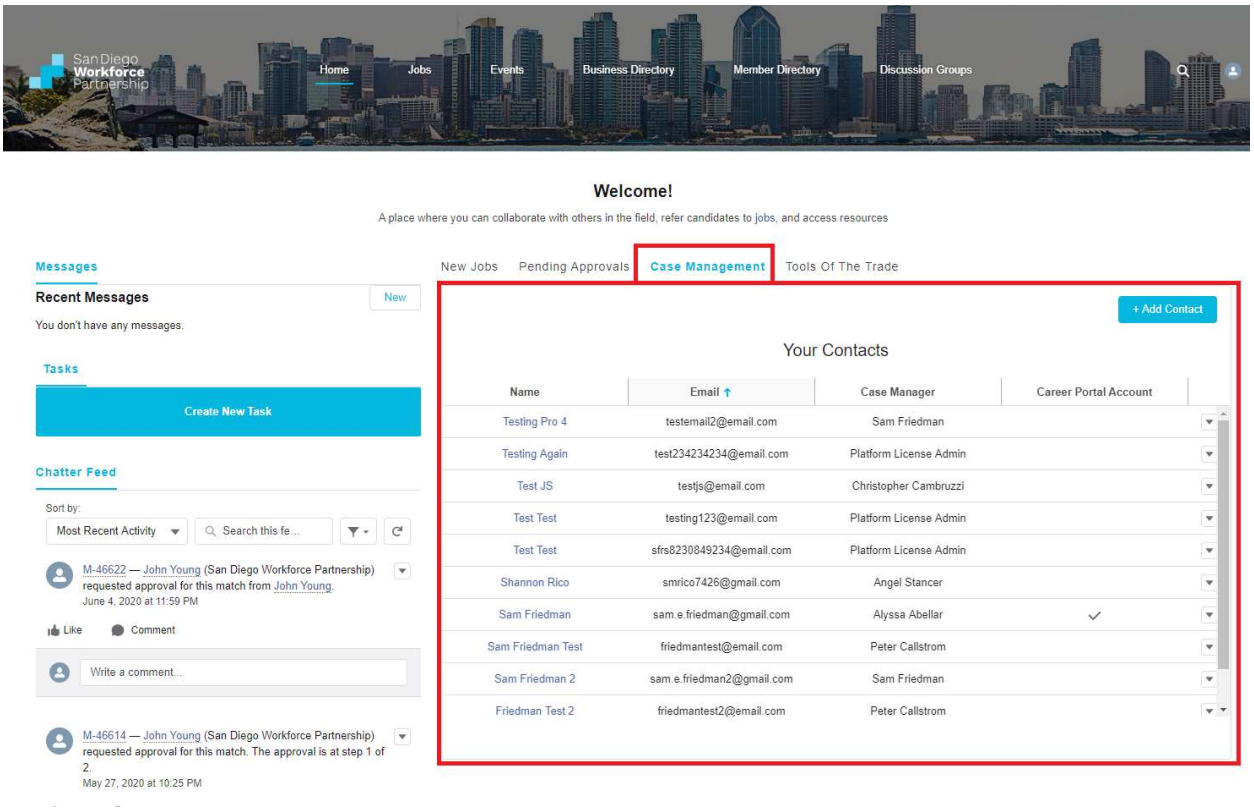


Contact Management

A Contact is an individual that is stored as a record in the Partner Portal's database. When any member of the Partner Portal refers a candidate to a job, that candidate is added to the database, or if they already exist, is updated.

Case Management

For KRA staff who work at the San Diego Career Centers, there is a case management feature available on the home page to manage these Contact records.

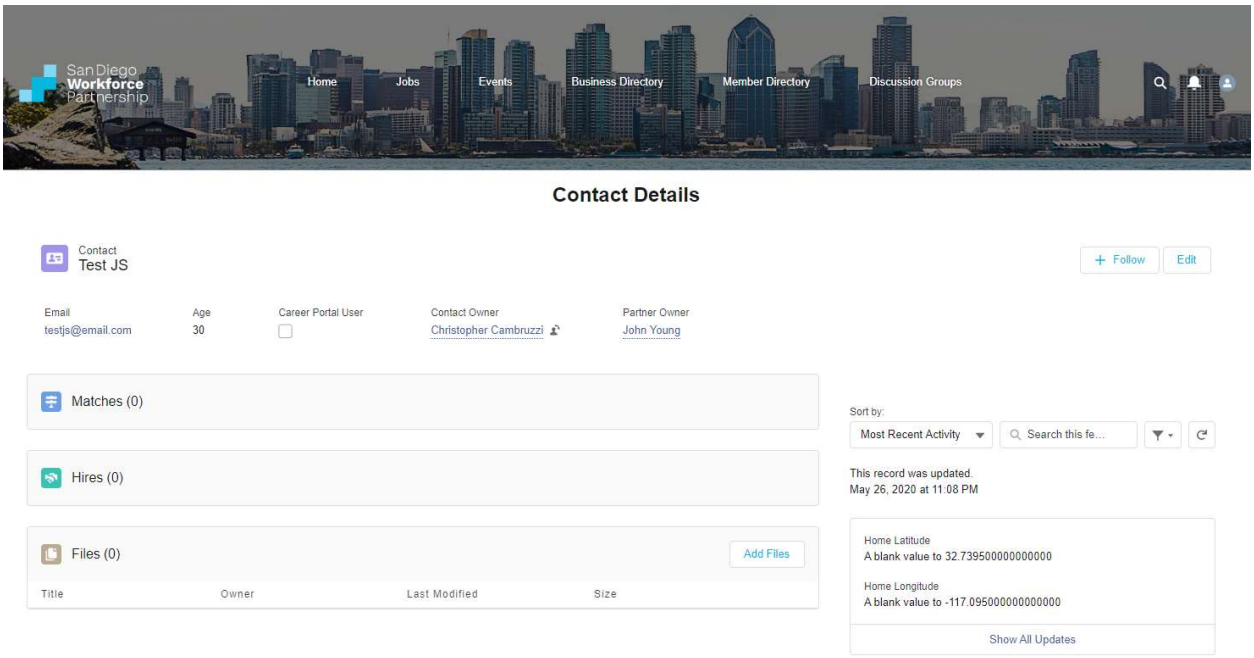


This table shows you Contacts where you are listed as the *Partner Owner*. In this table you can see the Contacts':

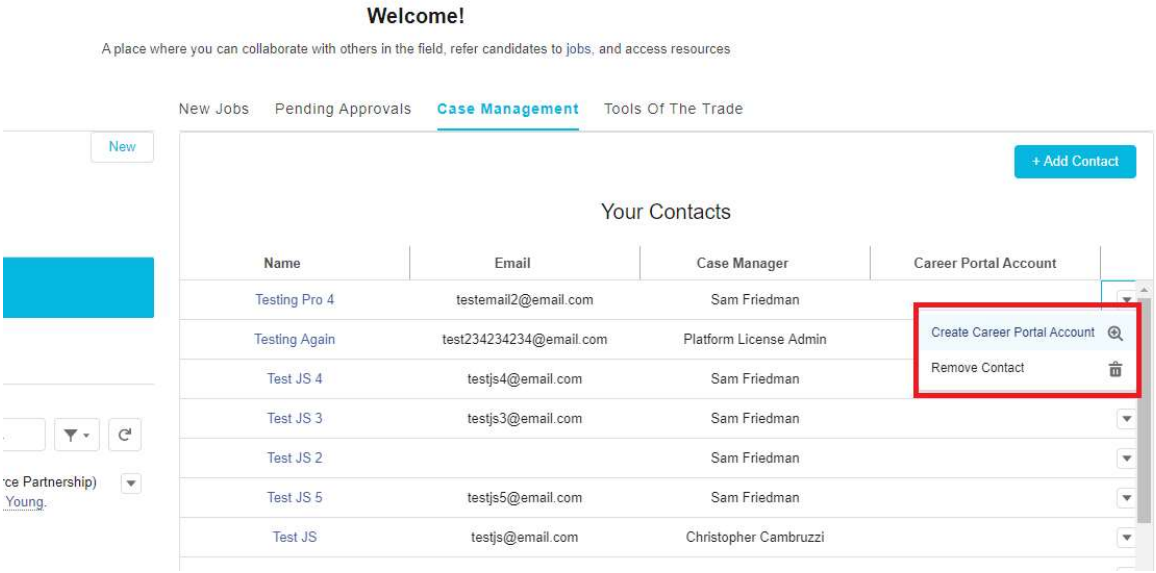
1. Name
2. Email
3. Case Manager – this will be the name of the Workforce Partnership staff member they have been assigned to as a case manager.
4. Career Portal Account – there will be a checkbox in this column of the Contact has created a Career Portal Account.

In this case management tab, you can:

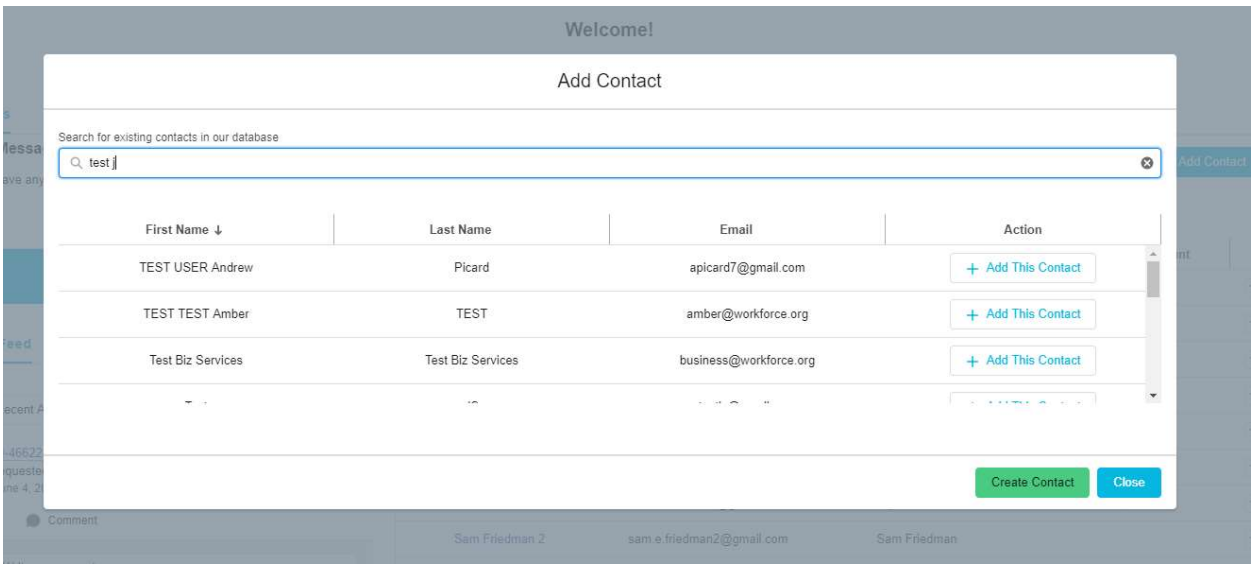
- Access Contact records that you have added to your caseload. In each Contact record you can view basic contact information, files, Matches, and Hires (placement records).
  - To access a Contact record, click on their name.



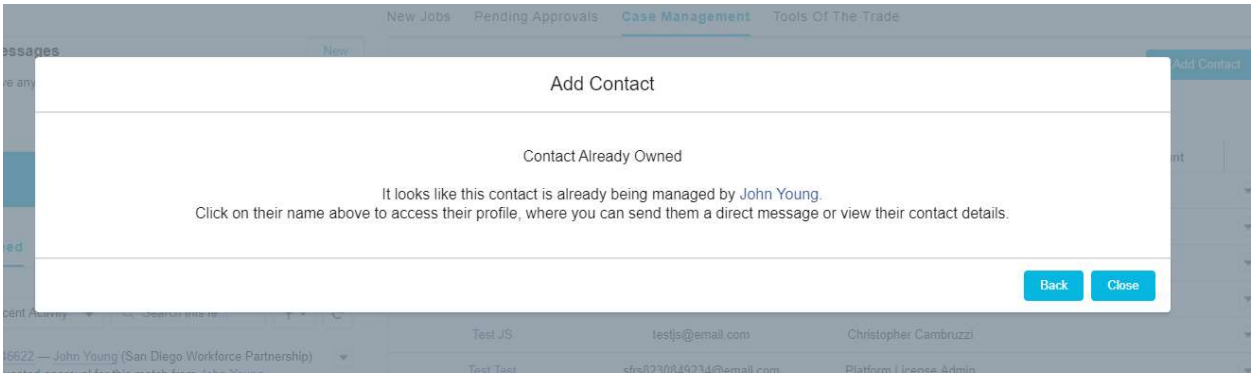
- Create Career Portal accounts for your Contacts, or remove them from your caseload.



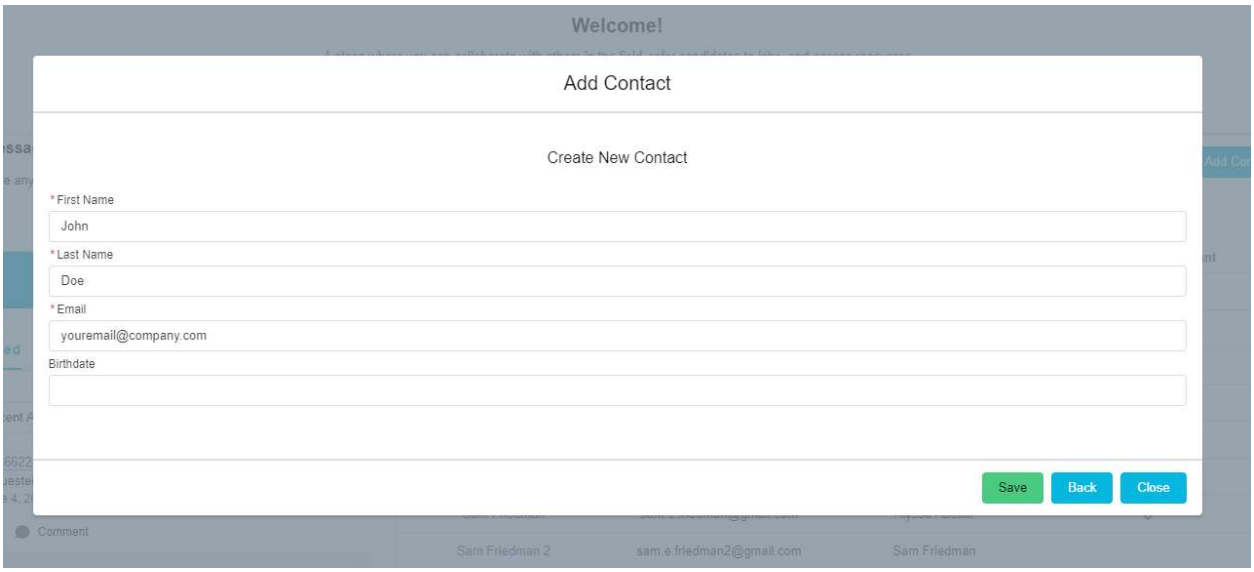
- Add Contacts to your caseload.
  - To add a Contact record, click the "+ Add Contact" button in the top right corner of the case management window.
  - Then search for your Contact's name or other identifiable information in the window that pops up and click "+ Add This Contact" button next to the Contact you want to add.



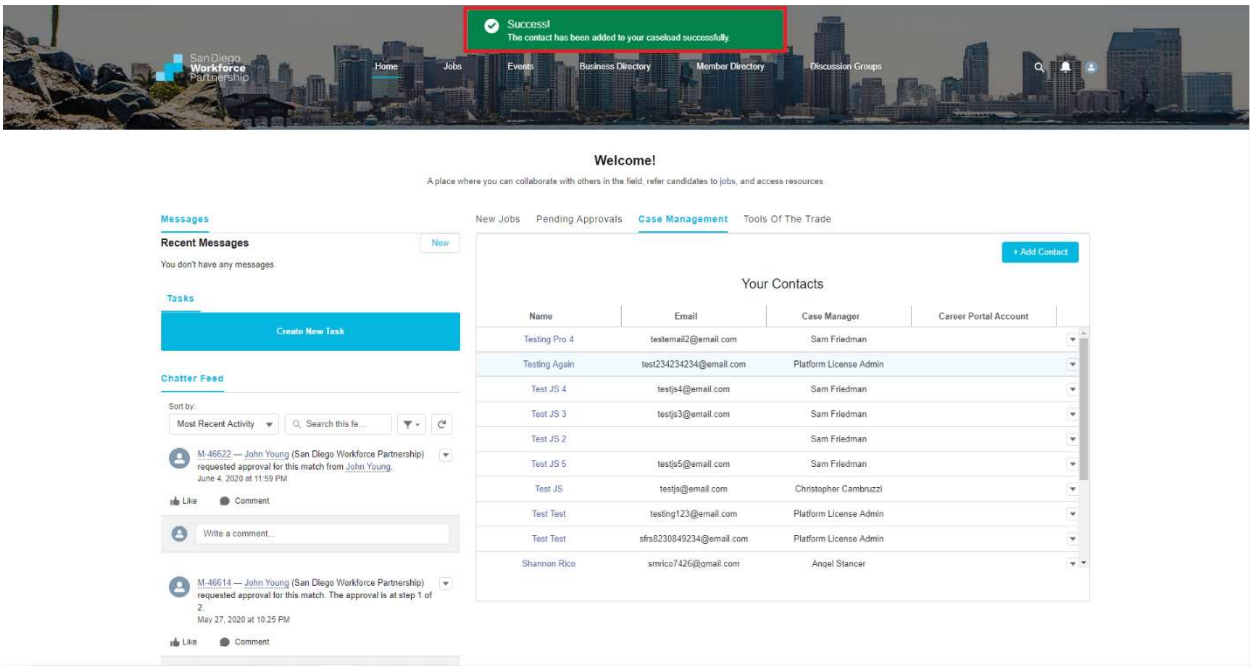
  - If you add a Contact that has already been added by someone on the Partner Portal (including yourself), you will see the message below. Click on their name to open their profile, where you can send them a direct message if you wish to request them to transfer the Contact to you.



- If you cannot find your Contact through the search, click the green “Create Contact” button at the bottom of the window and fill out their basic info to create a new Contact record. Click the “Save” button to save the Contact record.

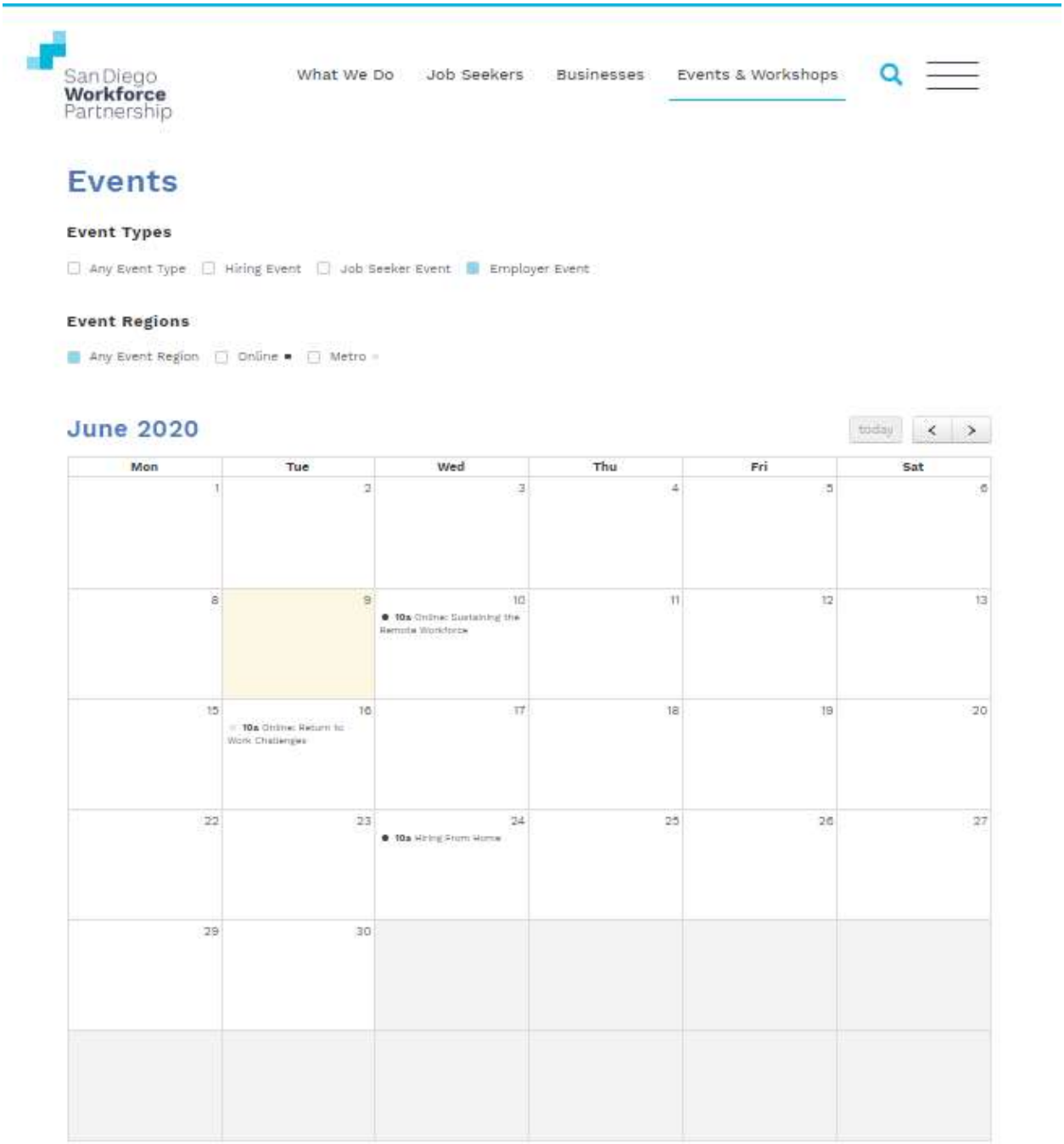


Once your Contact is created, you will be returned to the home screen and you will see the following message at the top of your screen.



Events

The Partner Portal has an ***Events*** tab on the navigation menu. When you click on this tab, it will open a new tab with the workforce.org events calendar, and it will show upcoming employer events in San Diego County.



Chatter

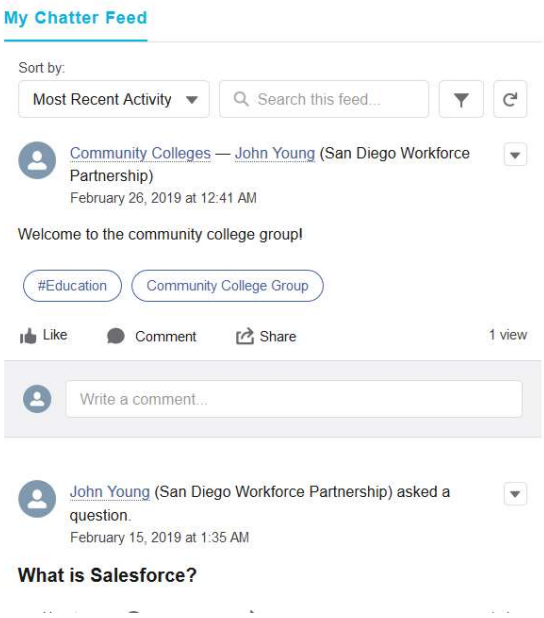
Feed Types

Chatter is a chatting function that allows you to tag people and records when making comments, fostering collaboration and efficient communication. A **Chatter feed** is a window that displays Chatter comments, with the newest comments at the top. There are two types of Chatter feeds:

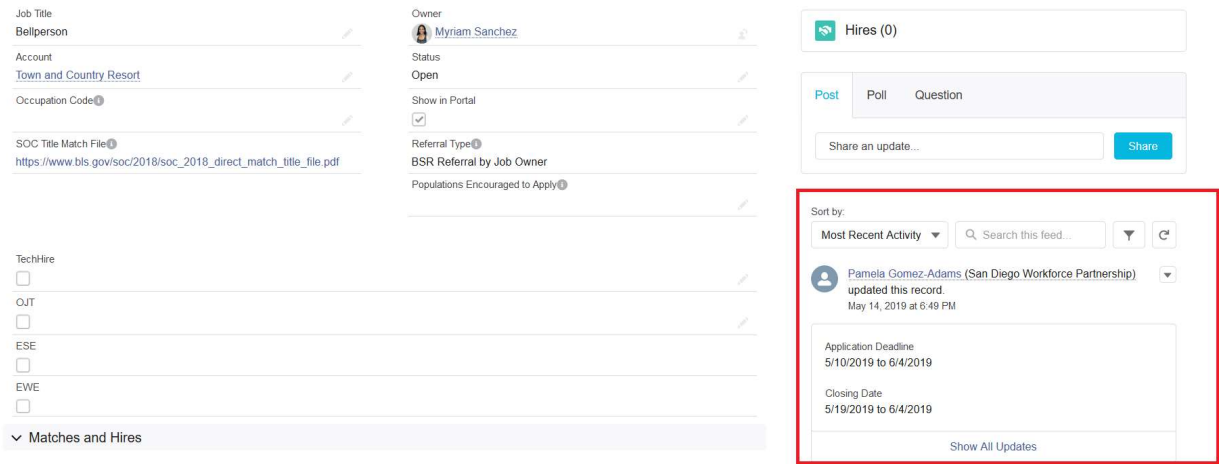
1. Your home page Chatter feed
    a. This has updates on records that you +**Follow** and comments that you are tagged in.
    b. When you comment on this Chatter feed, the only way others will see your post is if you tag people or if other Partner Portal members are following you, which you can see in your User Profile.
2. Record Chatter feed
    a. Any Chatter feed that is located on a record, whether it is a Job, Event, Match, etc.
    b. When you comment on this type of Chatter feed, it will automatically be linked to the record it is associated with.

Chatter feeds are sortable, filterable, and searchable, giving you easy access to whichever updates are most important to you.

Home page Chatter Feed:

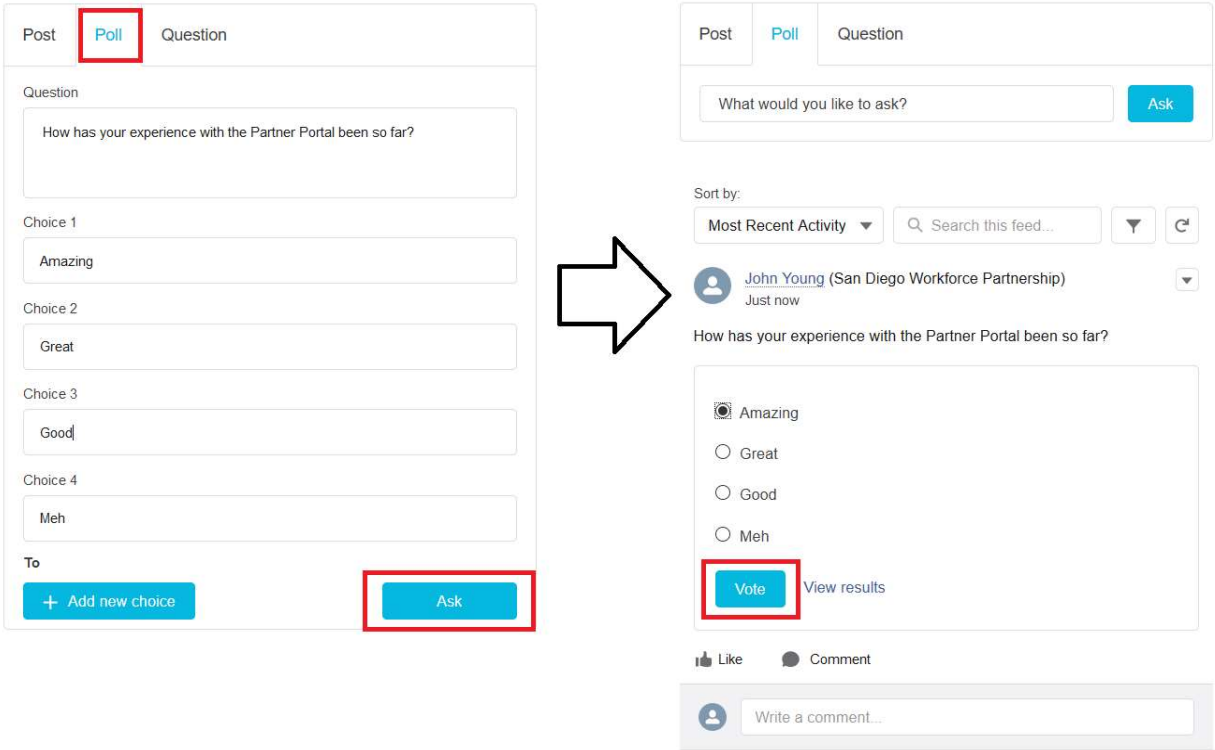


Record Chatter Feed:

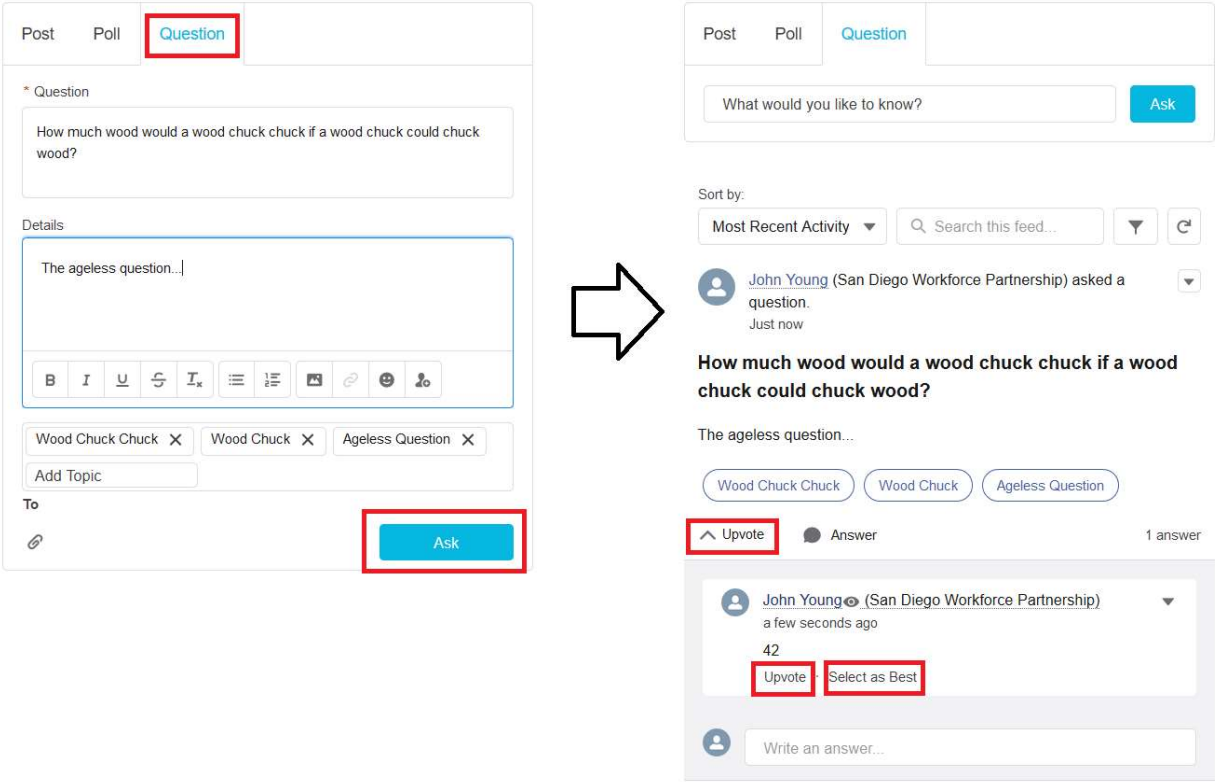


You will generally use the *Post* function on Chatter to post comments, but you can also use the *Poll* and *Question* functions to meet your needs. Poll results will show up anonymously, which makes it helpful to gather feedback from staff, while questions can help others who might have the same question find the best answer quickly.

Poll Example:

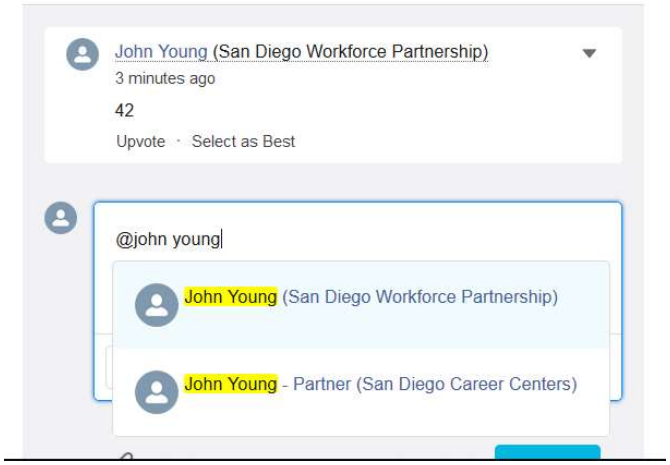


Question Example:



Tags

In order to tag another person in a Chatter post, use the @ symbol. Once you type @ and begin to type someone's name, it will offer suggestions, and you can click on the appropriate person listed in the dropdown dialog window, as shown below.



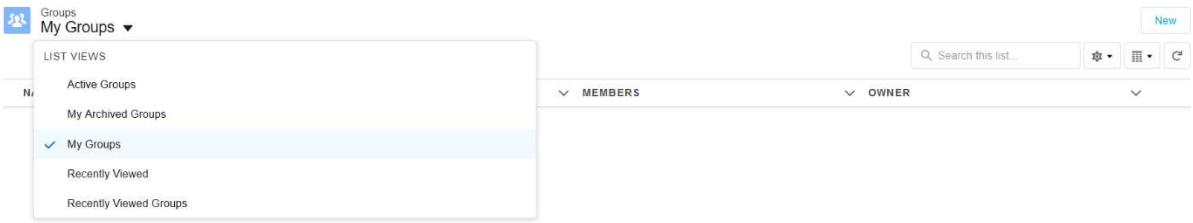
Tagging another person notifies that individual via email, showing the comment and allowing them to directly open the location of that comment from their email. You can also tag a Chatter Discussion Group using the @ symbol, which will populate your post in the main discussion group Chatter feed; this can be useful for collaboration on a particular issue or record.

Chatter Discussion groups

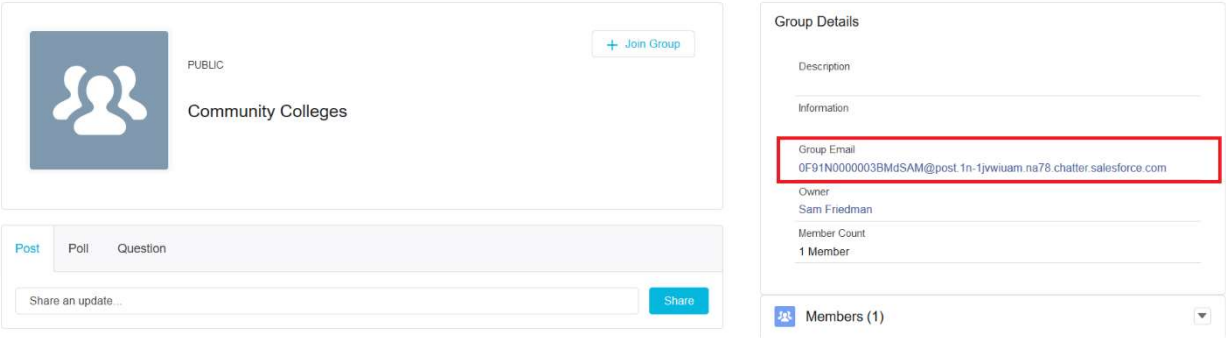
There are also **Chatter Discussion Groups** that are set up to foster collaboration within certain teams.

In order to see all active, public groups, click on the ***Discussion Groups*** navigation menu tab, which will take you to the **Groups List** page. From here click on the list view on the top left of the page to select the Active Groups list.

Groups List

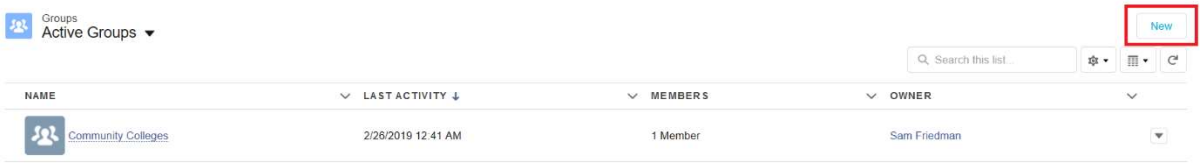


In each group there is a Chatter feed where members of the group (or non-members if the group is public) can post messages to the group. Group members can post to the Chatter feed via email by using the *Group Email* listed under the Group Details section; any text that is sent to this email address will be posted as text in the Chatter feed of the group.

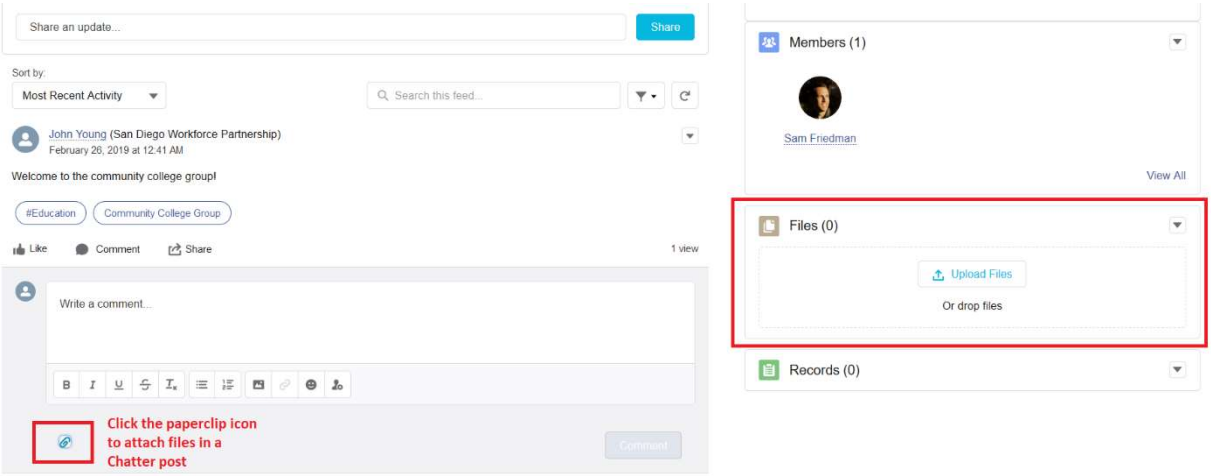


In order to create a new group, navigate to the **Groups List** page and click the *New* button at the top right of the list view, fill out the group details, and click save.

Groups List



You can share **Files** in Chatter Groups by navigating to the group detail page and either attaching the file to a Chatter post or uploading it in the Files tab on the right side of the page under the Members tab.

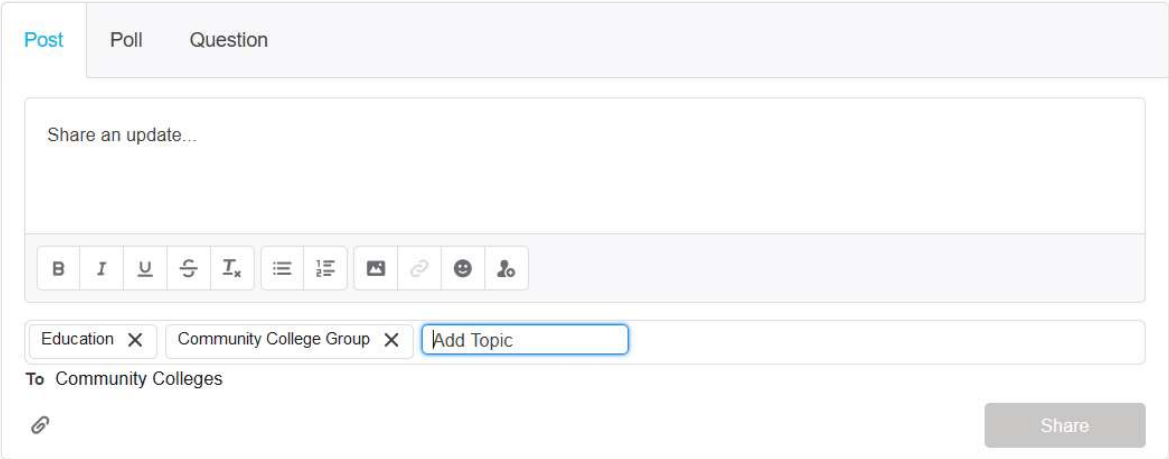


Topics

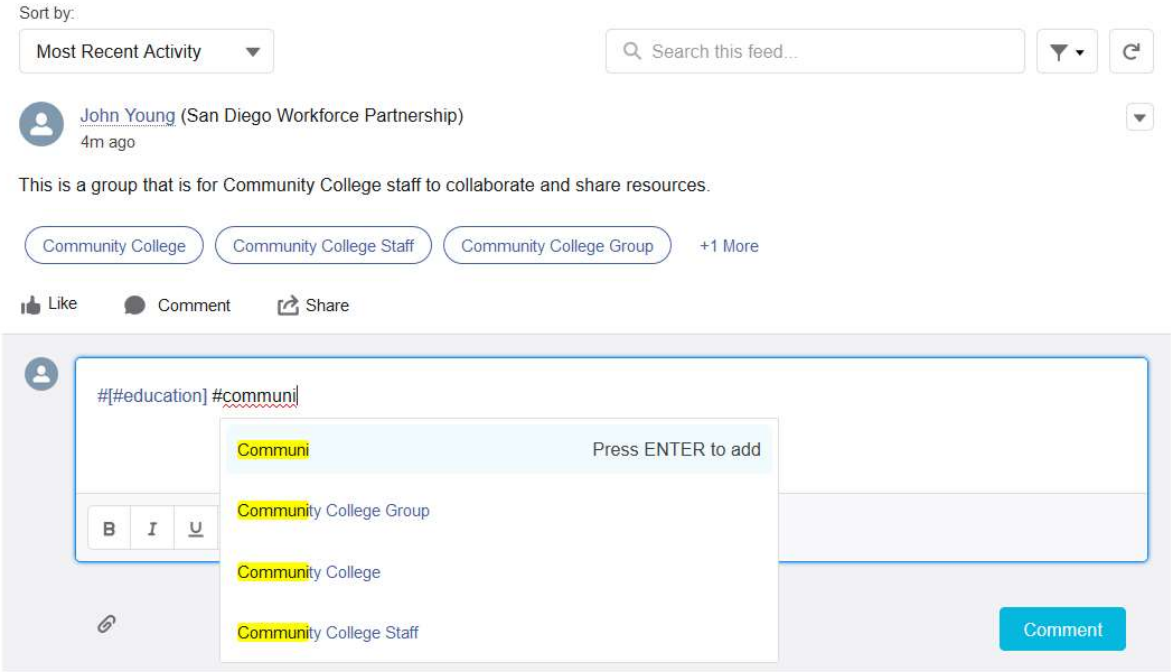
Topics are useful for grouping records and Chatter posts through the use of topic tags. You can click on a topic to access other Chatter posts and records that have been tagged under the same topic.

Chatter Topics

You can add a topic to a Chatter post at the bottom of the Chatter post window, as seen below. Often recommended topics will automatically populate on your posts based on its wording content.



In order to add a topic to a reply comment, use a # followed by your topic tag.

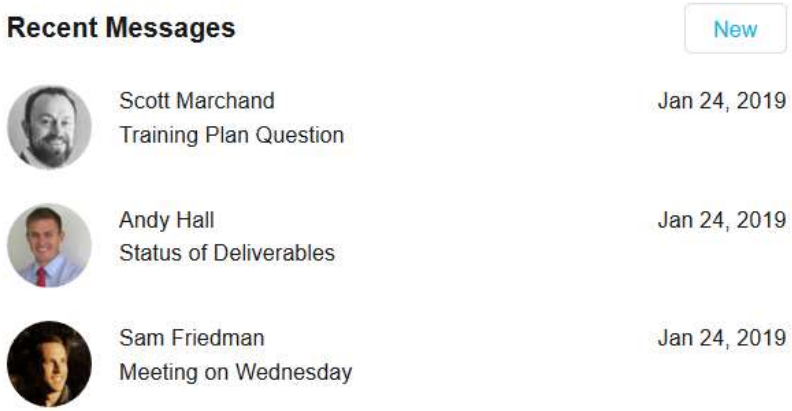


Record Topics

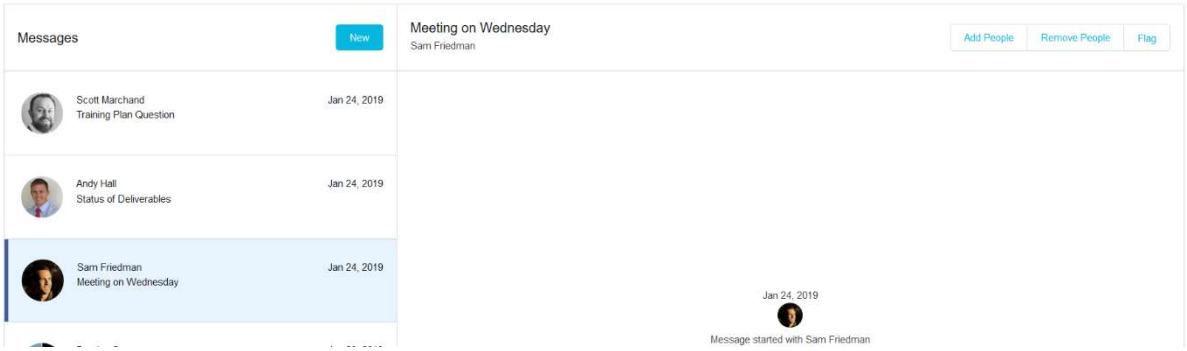
Just as you can add topic tags to your Chatter posts to group them together, you can also do so for records under the Topics tab. You are able to assign up to 100 topics to a single record. When you click on one of the topics, it will take you to the topic discussion page, where you can see other posts that have also been tagged with that topic.

Direct Messaging

In order to communicate directly with other members of the Partner Portal, you can use direct messaging. Recent messages can be seen on your home page, and you can also create messages from here directly by clicking on the *New* button next to Recent Messages, as shown below.



You are also able to add or remove people from a conversation, allowing you to maintain a private conversation but do so with a group of other people. This can be accomplished from the message screen, which is opened when you click on a message.



Support

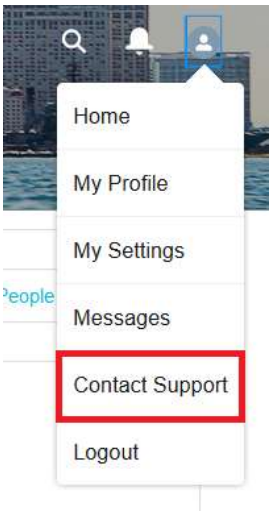
Business Support - Discussion Questions

In order to address business related questions, there are a couple of different support options. First and foremost, we encourage members of the Partner Portal to pose their question to the community, tagging topics and individuals as desired to get the attention of others. This is a good practice because it allows other current and future members of the community to also find the answer to your question, and this practice will therefore promote institutional knowledge and partner collaboration.

The second support option is to email Business@workforce.org, which will put you in touch with the San Diego Workforce Partnership business services team. This is for questions that either require urgency or are too specific or private to ask the community.

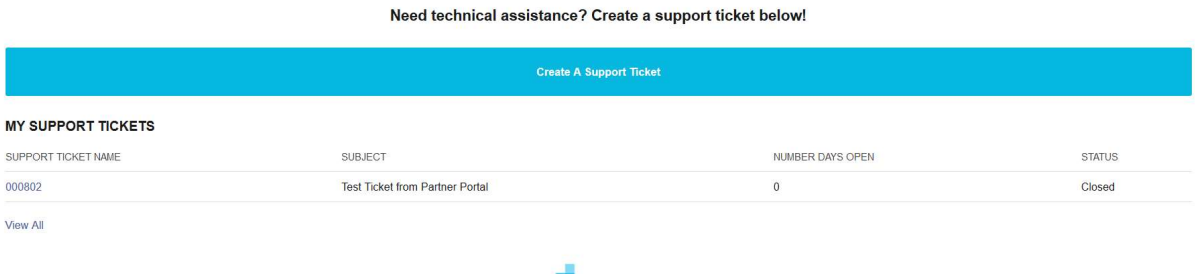
Technical Support - Support Tickets

In order to receive technical support, there are once again two options. The first step to both is to click Contact Support on your profile menu, which will take you to the ***Contact Support*** page.



From this page, we recommend using the *Ask a Question* button for issues such as 'how to create a referral' or 'where to access resources', since these are technical questions but do not necessarily require dedicated technical support, and there may be others who can benefit from the answers you receive to these questions from the community.

For immediate technical assistance when encountering errors, please create a support ticket by navigating to the lower half of the ***Contact Support*** page and clicking the *Create a Support Ticket* button.

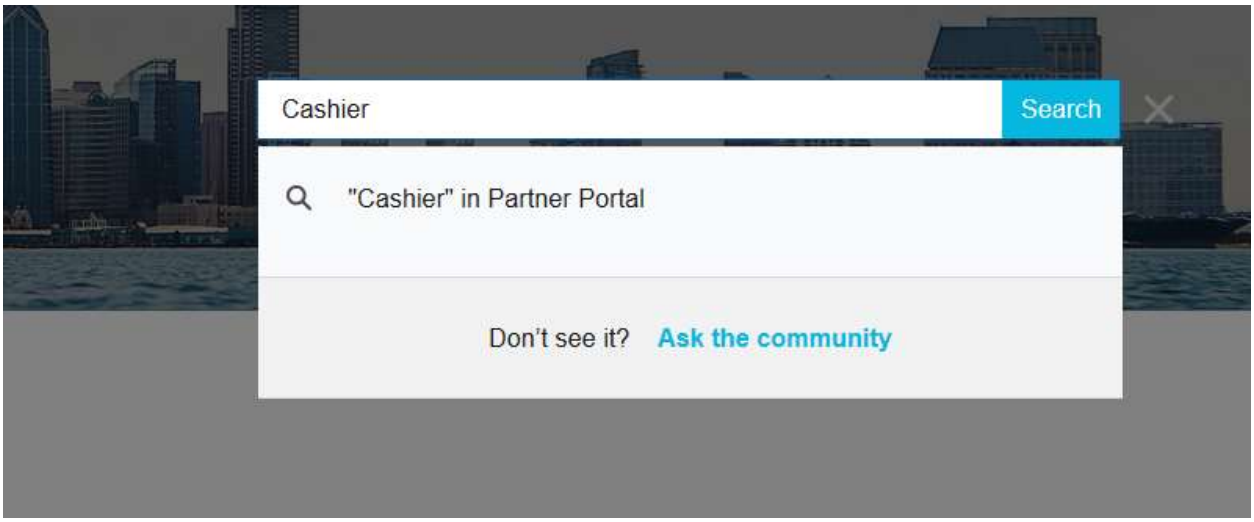


From here you will be prompted to answer a few questions, after which a support ticket will be created and will be shown in a list underneath the button. If you have any difficulty in creating a support ticket by this means, such as if you are not able to log into the Portal, then please contact support at SalesforceSupport@workforce.org instead. Please do not create a ticket **AND** send an email, as this will unnecessarily create duplicate support tickets.

Global Search

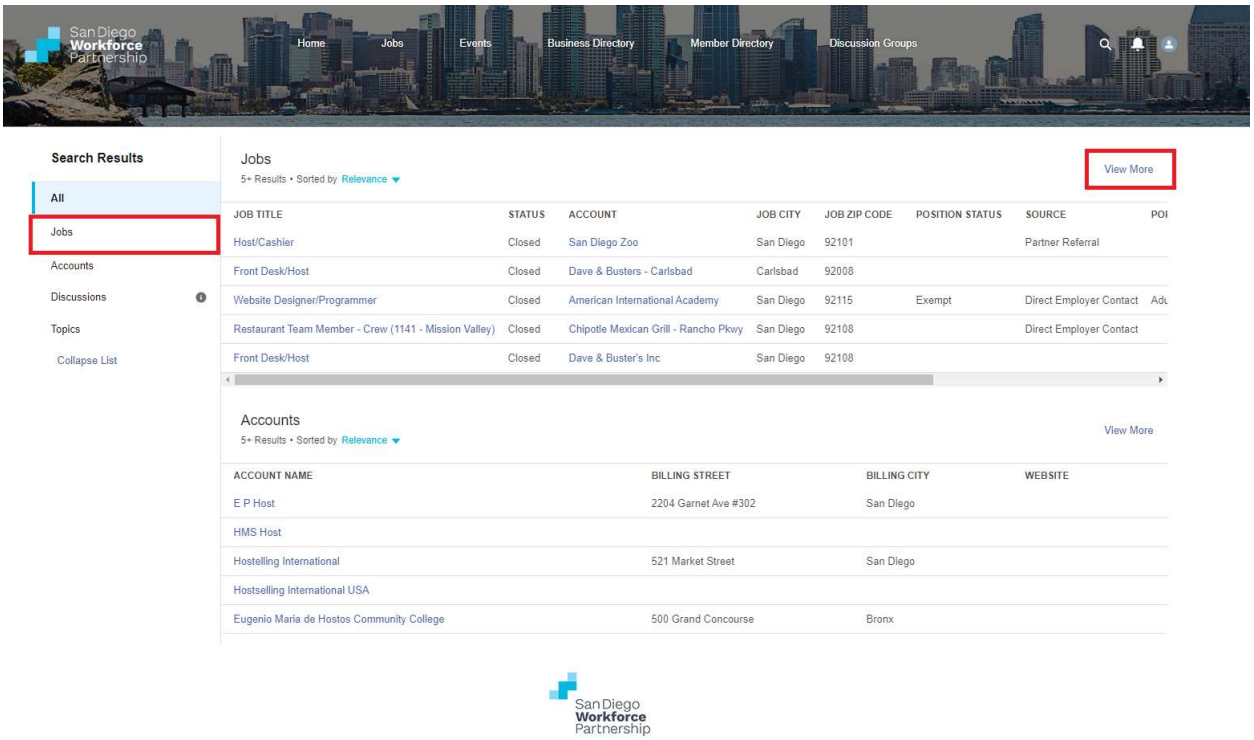
In order to perform a more robust search of all Jobs in our Salesforce database, you can also use the ***Global Search***, which is located at the top right of the page header as a magnifying glass icon.

Once you enter your search term into the ***Global Search***, it will populate a limited set of search results in real time in a window under the search bar, as seen below. If you do not see any immediate results based on your keyword, you can perform a full search by hitting enter on your keyboard.

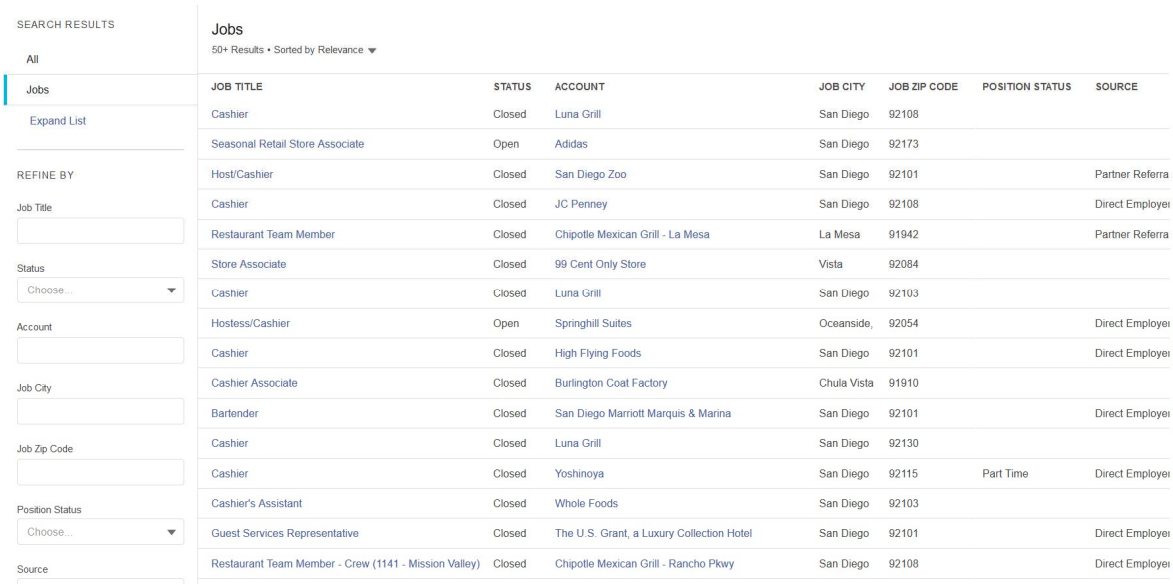


Once you hit enter, you will be redirected to a ***search results*** page, where all relevant Salesforce Jobs, Accounts, and Discussion & Topic results will show, based on your search terms.

Below, we can see that 5+ jobs are shown based on the search for the word *Host*.



Since there are more than 5 Job records found that are related to that search term, you can view all of the results for this search by either clicking the ***View More*** link at the top right of the search results or by clicking the ***Jobs*** tab on the left side of the search results under ***All*** (shown below).



You can choose to **Filter** these search results by using the fields on the left side of the search results screen under the words ***Refine By*****,** further narrowing your results. One important consideration when searching for records using the ***Global Search*** is that you will see all records stored in our Salesforce database, not just those shown in the Jobs list on the ***Jobs*** page. This will include Jobs that are outdated and closed. Therefore, it is important to properly filter your results when using this powerful search feature so that you are getting the desired results.

In the case of Jobs, using the ***Status*** filter will allow you to only view jobs that are currently Open to applications, rather than closed, as shown below.

Please also note that ***Global Search*** will search all fields on a job record, including the job description, address, education required, and any other field you can see when you open a job record. For example, the *Bartender* position above does not have the search term, *Cashier*, in its title, but you will find if you open the Job record that the word Cashier can be found in its job description.