Name: ____________________

Staffing Specialist

Section 7:
Intake Order

Training & Practice Guide

How to Use this Guide

Use this guide to practice the PeopleReady Foundation job-specific skills.

For each job-specific skill, you will:

REVIEW	Review the context and focus of the skill.
PREPARE	Complete all assigned courses and reference any resources related to the skill.
OBSERVE	Schedule time with a mentor or manager to observe the skill being performed on the job.
PRACTICE	Complete the skill several times until you're ready to demonstrate the skill on the job.
DEMO THE SKILL	Ask your manager to observe you as you perform the skill on the job. Your manager will sign-off when you've successfully demonstrated the skill.

Complete all the assigned Training & Resources before you practice and demonstrate the skills to your manager.

Skill Check Checklist

Track your progress as you practice and demonstrate each skill to your manager:

Intake Order Skills	Date Completed
Validate the Customer Profile	____________
Determine Account Serviceability	____________
Verify Customer Contact Authorization	____________
Complete the Order Intake Form	____________
Create a Job Order – Find the Customer and Quote	____________
Create a Job Order – Enter the Job Order Schedule	____________
Create a Job Order – Add Skills and PPE	____________
Create a Job Order – Enter the Job Description & Notes	____________
Save the Job Order	____________
Verify the Job Order is Live on JobStack	____________
Invite the Customer to Download JobStack	____________
Demo the Customer App Functionality	____________

Intake Order Badge

When you successfully demonstrate **all** the skills to your manager, request a badge to certify you have successful completed the Intake Order section.

To request your **Intake Order** badge:

1. Go to TrueBlue University.
2. Search for “Badge Request: Intake Order.”
3. Click the **Badge Request: Intake Order** course.
4. Click **Request Approval**.

   Note: Your manager will approve your badge request.
5. When you manager approves your request, click **Launch Course**.
6. In the course, acknowledge you completed the section.

Validate the Customer Profile

REVIEW

When a customer calls to place an order, verify they have an account with us by locating and opening the customer profile in PRISM. Validate the customer's billing address by reading it back to the customer. This step helps prevent incorrect service to "sound alike" customers.

PREPARE

Refer to the training and resources below, as needed, to prepare for and practice the skill:

Online Courses
Getting Started with PRISM
Verifying the Order Can Be Taken

Job Aid
Search for Existing Customer Profile
Validate and Update Customer Profile

OBSERVE

Watch a peer mentor or manager validate a customer profile by accessing the profile in PRISM and verifying the billing address with the customer.

PRACTICE

While you and a peer are logged into PRISM, ask a peer to name a current customer. Validate the customer profile. Repeat the exercise as needed.

Customer Name: ______________________________

Billing Address: ______________________________

Customer Name: ______________________________

Billing Address: ______________________________

DEMO THE SKILL

When you've mastered validating the customer profile, schedule time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Determine Account Serviceability

REVIEW

Customer accounts with an "acceptable" credit status are serviceable, meaning we can take orders from these customers immediately.

To check a customer's credit status in PRISM, see Credit & Collections & Billing on the customer profile Summary tab.

Customers with an "Unacceptable" credit status may be under a credit hold, which they must resolve before placing new orders.

PREPARE

Refer to the training and resources below, as needed, to prepare for and practice the skill:

Online Courses
Verifying an Order Can Be Taken

Resources
Credit & Collections

OBSERVE

Watch a peer mentor or manager check a customer account's credit status in PRISM to determine serviceability.

PRACTICE

Determine account serviceability for customer accounts in PRISM. Locate two accounts and note the credit status of each.

Customer Name: ____
Credit Status: ____

Customer Name: ____
Credit Status: ____

DEMO THE SKILL

When you've mastered determining account serviceability, schedule time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Verify Customer Contact Authorization

REVIEW

Some national and larger strategic accounts allow only certain company representatives to place job orders.

To verify the person calling is authorized to place orders:

1. Navigate to the **Servicing** tab on the customer profile. If the "Authorized to Order Customer Contacts must be used" checkbox is checked, then you must verify the caller is listed as an Authorized to Order Customer Contact.
2. Navigate to the **Profile Details** tab, **Contacts** sub-tab, and locate the caller's name under Customer Contacts. If the caller is not listed as an Authorized to Order Customer Contact, politely ask to speak to an authorized contact so that you can take the order.

PREPARE

Refer to the training and resources below, as needed, to prepare for and practice the skill:

Online Course
Verifying an Order Can Be Taken

Job Aid
Validate and Update Customer Profile

OBSERVE

Watch a peer mentor or manager verify customer contact authorization in PRISM to determine a caller is authorized to place orders for the customer.

PRACTICE

Verify customer contact authorization for a customer account. Note the customer name and the Authorized to Order Customer Contact, if applicable.

Customer Name: ______________________________

Authorized to Order Customer Contact(s): ______________________

DEMO THE SKILL

When you've mastered verifying customer contact authorization, schedule time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Complete the Order Intake form

REVIEW

After checking key points in PRISM to verify the order can be taken, you complete the Order Intake Form to capture information needed to create the job order in PRISM.

PREPARE

Refer to the training and resources below, as needed, to prepare for and practice the skill:

Online Course
Completing the Order Intake Form

Job Aid
Rules for JobStack Skills Match

Resources
Order Intake Form: General
Order Intake Form: Oregon Only
PPE
Safety Sensitive Site Support and Compliance
Credit & Collections
Common/General Industry Positions

OBSERVE

Watch a peer mentor or manager complete an Order Intake Form while taking an order from a customer. Identify best practices for gathering and documenting complete and accurate information for each section of the form.

PRACTICE

Practice completing the Order Intake Form by reverse-engineering a form based on an existing job order in PRISM.

Write the job description based on the information available in the job order, and include a safety statement.

Ask a peer mentor or manager to review the Order Intake Form and note any missing, incomplete, or inaccurate items.

DEMO THE SKILL

When you've mastered completing the Order Intake Form, schedule time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Create a Job Order – Find the Customer and Quote

REVIEW

After you receive a request for service, verify the order can be taken, and complete the Order Intake Form, you create the job order by transferring information from the Order Intake Form into PRISM.

Creating a job order begins with finding the customer and the active quote that supports the job order.

PREPARE

Refer to the training and resources below, as needed, to prepare for and practice the skill:

Online Course
Creating Job Orders

DEMO
Enter Job Order
Search for Existing Quote

JOB AID
Create Job Order

OBSERVE

Watch a peer mentor or manager begin the process of creating a job order from a completed Order Intake Form by finding the customer and the quote for the job order.

PRACTICE

Work from a recent Order Intake Form to look up a customer and quote in PRISM.

From the Create New Job Order window in PRISM (**File** > **Job Order** > **Create Job Order**), look up the customer and find the quote that supports the job order.

DEMO THE SKILL

When you've mastered finding the customer and quote, schedule time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Create a Job Order – Enter the Job Order Schedule

REVIEW The job order schedule is a combination of the date and start time of the shift and the demand, which is the number of associated requested each work day.

PREPARE Refer to the training and resources below, as needed, to prepare for and practice the skill:

Online Course
Creating Job Orders

Demo
Enter Job Order

Job Aid
Create Job Order

OBSERVE Watch a peer mentor or manager enter a job order schedule based on the information from page 1 of a completed Order Intake Form.

PRACTICE Enter the shift and demand for a job order schedule in PRISM based on the information in a completed Order Intake Form.

Also create an entry in Order Schedule Notes with information from the Position field on the Order Intake Form.

DEMO THE SKILL When you've mastered entering a job order schedule, arrange time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Create a Job Order – Add Skills and PPE

REVIEW

Job orders include the skills and experience needed for the Job, as well as required personal protective equipment (PPE).

JobStack uses these and other selections on the job order's Requirements screen to match associates to the job.

PREPARE

Refer to the training and resources below, as needed, to prepare for and practice the skill:

Online Course
Creating Job Orders

Demo
Enter Job Order

Job Aid
Create Job Order

Resources
Rules for JobStack Skills Match
Common/General Industry Positions

OBSERVE

Watch a peer mentor or manager add skills and PPE to a job order based on a completed Order Intake Form.

PRACTICE

Select the skills and years of experience for a job order in PRISM based on the information in a completed Order Intake Form.

Also add the PPE items checked in the Personal Protective Equipment section of the Order Intake Form.

DEMO THE SKILL

When you've mastered adding skills and PPE to a job order, schedule time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Create a Job Order – Enter the Job Description & Notes

REVIEW

The **Special Notes** field on the job order's Requirements screen is where you enter the job description from the Order Intake Form (see "Thorough description of job duties" in the Job Information section of the form).

This job description appears in JobStack and is read by associates *before* accepting the position. It helps them determine whether the job is a good fit for their skills and preferences.

In contrast, the information you enter in the **Notes for Associate** field becomes visible to associates in JobStack *after* they accept the job. Examples of notes for associates include information about the jobsite location, recommended clothing for inclement weather, and required uniform, tools or equipment.

PREPARE

Refer to the training and resources below, as needed, to prepare for and practice the skill:

Online Course
Creating Job Orders
Appropriate Job Descriptions on JobStack

Demo
Enter Job Order

Job Aid
Create Job Order

OBSERVE

Watch a peer mentor or manager enter a job description and notes for associates to a job order. Identify best practices for writing a job description and for selecting information from the Order Intake Form to include in the notes for associates.

PRACTICE

Review the job description on a recent Order Intake Form and note how it follows, or fails to meet, best practices. Draft a "Notes for Associates" entry based on information throughout the form. Ask a peer mentor or manager for feedback.

DEMO THE SKILL

When you've mastered entering a job description and notes for associates, schedule time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Save the Job Order

REVIEW

Although saving a job order is as simple as clicking **Save** on the Create Job Order window's Pre-Qualifying screen, it's important to ensure the job order is complete and accurate before saving it.

Equally important is addressing any notices PRISM prompts you with upon saving the order, such as a credit hold, credit limit, or aging warning.

PREPARE

Refer to the training and resources below, as needed, to prepare for and practice the skill:

Online Course
Creating Job Orders

Demo
Enter Job Order

Job Aid
Create Job Order

OBSERVE

Watch a peer mentor or manager save a completed job order and address any notices presented by PRISM.

PRACTICE

With a peer mentor or manager present, review a job order currently in progress in PRISM for completeness and accuracy, save the job order, and address any notices presented.

Discuss the following with a peer mentor or manager:

- The role of data integrity in transferring information from the Order Intake Form into PRISM
- The implications of saving a job order with a missing job order schedule

DEMO THE SKILL

When you've mastered saving job orders, schedule time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Verify the Job Order is Live on JobStack

REVIEW

When you save a new job order that includes demand details (job order schedule), it appears on JobStack. It's a best practice to verify the job is live on the exchange and is displaying as expected in the app.

PREPARE

Refer to the training and resources below, as needed, to prepare for and practice the skill:

Online Course
Creating Job Orders

Job Aid
Desktop Interactive Job Aid

OBSERVE

Watch a peer mentor or manager verify that a job order is live on JobStack.

PRACTICE

Locate and display a job order in JobStack that was recently created in PRISM. Confirm the job information is accurate, including the Job Title, Job Site Address, and the number of associates required.

Discuss with a peer mentor or manager common job order issues that become apparent when viewing the job in JobStack and how to resolve them.

DEMO THE SKILL

When you've mastered verifying job orders are live on JobStack, schedule time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Invite the Customer to Download JobStack

REVIEW

When an established customer who is a good fit with JobStack expresses interest in using the JobStack Customer app, provide the customer with an invitation code that allows them to download the JobStack Customer mobile app.

PREPARE

Refer to the training and resources below, as needed, to prepare for and practice the skill:

Demo
Customer Demo

Job Aid
Invite Customer to Download JobStack

Resource
Customer Email Template 2
Call Scripts
Ideal Customer Profile

OBSERVE

Watch a peer mentor or manager use the JobStack Branch Desktop to invite a customer to download JobStack and walk a customer through the steps for downloading the app onto their mobile device.

PRACTICE

With a peer mentor or manager present, initiate an invitation in the Branch Desktop for a customer to download the JobStack Customer mobile app.

Walk a peer mentor or manager through the steps for downloading the JobStack mobile app onto their phone as if they were a customer.

Discuss with a peer mentor or manager:

- Why some customers are not a good candidate for the app
- How to ensure a customer is ready for the password process setup

DEMO THE SKILL

When you've mastered creating an invitation for customers to download JobStack, schedule time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Demo the Customer App Functionality

REVIEW Anytime a customer who is a good fit for JobStack calls the branch to request work, introduce them to the customer app and highlight the benefits.

PREPARE Refer to the training and resources below, as needed, to prepare for and practice the skill:

Online Course
JobStack Customer App Demo

Demo
Customer Demo

Resource
Customer App Demo Loop
Ideal Customer Profile
JobStack Customer FAQ

OBSERVE Watch a peer mentor or manager demonstrate the JobStack customer app's functionality to a customer. Note best practices in the presenter's demonstration.

PRACTICE Meet with your branch manager to understand your role in helping customers to use the app.

Conduct a mock demo of the JobStack customer app's functionality with a peer mentor or manager.

DEMO THE SKILL When you've mastered demonstrating the JobStack customer app's functionality, schedule time with your manager to demonstrate the skill on the job.

Did you receive feedback from your Manager? Are there areas to improve?

Training & Resources

Complete these Trainings and Resources, as needed, before you practice and demonstrate the skills to your manager.

Online Course	Location	Duration
Appropriate Job Descriptions on JobStack	TrueBlue University	10 minutes
Completing the Order Intake Form	TrueBlue University	10 minutes
Creating Job Orders	TrueBlue University	10 minutes
JobStack Customer App Demo	TrueBlue University	05 minutes
Verifying an Order Can Be Taken	TrueBlue University	15 minutes
Register for Virtual Classroom Session	**Location**	**Duration**
The Job Order	TrueBlue University	
Job Aids	**Location**	
Create Job Order	PeopleReady Resource Center	
Desktop Interactive Job Aid	JobStack Resource Center	
Invite Customer to Download JobStack	PeopleReady Resource Center	
Rules for JobStack Skills Match	JobStack Resource Center	
Search for Existing Customer Profile	PeopleReady Resource Center	
Validate and Update Customer Profile	PeopleReady Resource Center	
Demos	**Location**	
Customer Demo	JobStack Resource Center	
Search for Existing Quote	PeopleReady Resource Center	
Resources	**Location**	
Call Scripts	JobStack Resource Center	
Credit & Collections	1StrongTeam	
Common/General Industry Positions	JobStack Resource Center	
Ideal Customer Profile	JobStack Resource Center	
Order Intake Form: General	PeopleReady Resource Center	
Order Intake Form: Oregon Only	PeopleReady Resource Center	
Safety Sensitive Site Support and Compliance	1StrongTeam	
PPE	1StrongTeam	