

Desk Guide for Provider Module Data Entry and Maintenance

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OSOS DESCRIPTION AND ACCESS INFORMATION

America's One Stop Operating System (OSOS) is a case management, tab and button driven system, used to record data related to the Wagner/Peyser (Labor Exchange or LEX) and Workforce Investment Act (WIA) programs. This guide describes how to populate and maintain the **Provider** module.

OSOS has specific minimum requirements for computers and connectivity settings. The specific computer and connection information is found at <http://labor.ny.gov/workforcenypartners/osos/OSOSTroubleshootingDeskGuide.pdf>.

Note: Some field names in this desk guide are abbreviated, to match how they are displayed in OSOS. Also, the graphics used in this guide are fabricated and not true indicators of the OSOS application at the time of publication.

Throughout this guide, symbols are used to highlight certain information:



Indicates important information



Indicates Best Practices




Indicates the information flagged pertains to **Youth participants**

OSOS is accessed by Department of Labor users connected to the HSEN network at <https://nyosos.labor.state.nyenet/osos.html> and requires a username and password that must be obtained by the local OSOS security coordinator from the NYS Department of Labor.

Other users connect to OSOS via <https://osos.labor.ny.gov/osos.html>.

The **Provider** module in OSOS stores information about the various service Providers across the state, including locations, contact information and offered services. **Provider Create** permission is required to access and make changes to this module.

Provider ID	Provider Name	City	Organization Type

 **Responsibility for populating the Provider module has historically been that of the Local Workforce Investment Area Security Coordinator or their designee. It is strongly recommended by WIA Central Security that a limited number of staff have access to this module to prevent duplication and errors. Staff accessing this module should be well-versed in OSOS, with a good understanding of the system.**

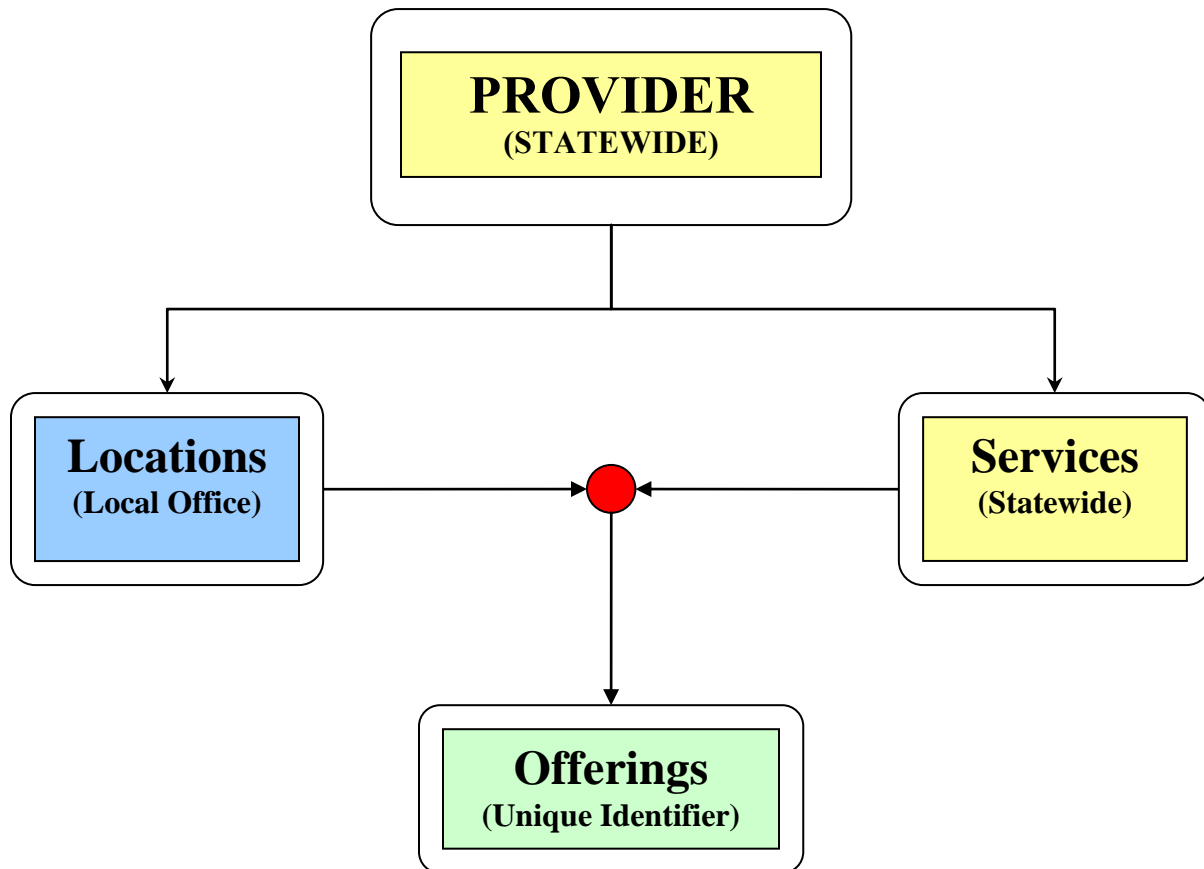
The Provider module is where all Level 2 (L2) services are created and stored, so they can be linked to customer records. These include **Training, Trade Act, State funded programs, NEG Specific, and Youth Specific** services.

The Common Measures functional alignment efforts of 2006 changed how staff-assisted services are recorded in OSOS. Staff-assisted services (L1 services) are **not** entered through the Provider module, but are recorded via the **Activities** tab in the Customer Detail module. The L2 services listed in the Activities screen should **not** be used at this time.

Understanding and correctly populating the Provider module helps to ensure that an accurate picture of a customer's history can be created and maintained.

OSOS PROVIDER MODULE STRUCTURE

Before entering or editing data in the Provider module, it is important to understand how it is structured. This flowchart shows the relationships between the different components of the Provider module.



Providers and their Services are entered into OSOS as statewide entities. Each Provider can have many Locations, attached to different WIBs or different offices within the same WIB. Entering a new Provider into OSOS does **not** give the creating WIB exclusive rights to that Provider record. Other WIBs who also use the Provider may add Locations which reflect their use of the Provider.

All Providers should be entered into OSOS only once, with the various locations and services attached. Unfortunately, some providers have been entered multiple times, leading to duplication, confusion and data entry errors. The duplicate records need to be corrected and guidance on that process is provided (see [Provider Consolidation to Eliminate Duplicate Records](#)).

Providers can have many different Services available to all offices, though not every office will necessarily use all services. The creation of an Offering is what associates a particular Service with a particular Location (office). Offerings are used by OSOS to identify **what service (Service)** a customer received and **what office (Location)** was responsible for providing it to the customer.

General Steps to Create a New Provider



Before creating a new Provider it is important to search for the provider in OSOS, using any possible combinations of spellings and abbreviations, to avoid duplicating Provider records.

The following steps are the general order in which data for a new Provider should be entered into OSOS. Detailed instructions on these stages follow.

- 1) Create the Provider
 - Enter information such as the full name, main address and contact information
 - This information should refer to the headquarters or main address of the Provider
- 2) Enter a Location
 - Provides a means of tracking multiple locations within one WIB or across many WIBs
 - At least one Location must be entered to save the Provider in OSOS.
 - Allows more than one WIB to use the Provider record
- 3) Create Services
 - Once created, Services may have Offerings added to link to any Location
- 4) Create Offerings
 - The most unique identifier, combining information about what Service was provided and which Location provided it.

THE PROVIDER SEARCH SECTION



Again, before entering a new Provider, it is essential that a search of the Provider's name be performed *without specifying a particular WIB*. The Provider may have been entered previously by another WIB or NYSDOL Central staff during the ETPL approval process (see [OSOS and the ETPL](#)).

As with other search screens in OSOS, the full name is neither required nor recommended. The first few letters of the name will generally suffice to bring up the Provider desired. One should also consider alternate spellings and acronyms. For example, The CDL School is found in OSOS as the following, among others:

- Commercial Driver Training
- Comm. Driving School
- Commercial Drivers License School, Inc.
- The CDL School, Inc.

The typo in the third name in the example above is an actual entry in OSOS. As you can see, typing out the full name would not have brought up all of the results. An additional search using “The” in the search field returned the final entry.

Using this method to search provides an opportunity to discover duplications and errors which require correction. For Providers with many entries by multiple WIBs, coordination between OSOS Central Security and the affected WIBs will be necessary to clean up these Providers.



Do not, under any circumstances, delete or change the Provider information of another WIB without their consent and cooperation.

For duplications which affect only **one** WIB, one record should be chosen as the “official” record and the others should be deleted or discontinued after consolidating the information (see [Provider Consolidation to Eliminate Duplicate Records](#)).

To search for a Provider, click on **Provider Search**. Enter the first few letters of the name into the **Provider Name** field. Do **NOT** enter information in any other field - a broad search will prevent duplicates from being entered accidentally. Click on the **Search** button.

If the Provider is found in OSOS, click on the entry to hi-light it and click on **Detail**. Otherwise, a new record can be created by clicking on the **New** button on the bottom right of the screen.

CUSTOMER PROVIDER EMPLOYER STAFF HELP

Provider Search Provider Detail Offering Search Offering Detail 1 - 6 of 6

Provider Search Custom

OSOS ID Status **Active** WIB

Provider Name Organization Type

City Federal Provider ID (FEIN)

Service Category State Provider ID (EIN)

Service Type Service Type

CIP Code CIP Code

<input type="checkbox"/>	Provider ID	Provider Name	City	Organization Type
<input type="checkbox"/>	4141	Commercial Driver Training	Kingston	Private
<input checked="" type="checkbox"/>	2046	Commercial Driver Training, Inc.	Kingston	Private
<input type="checkbox"/>	2047	Commercial Drivers License School, Inc.	Menands	Private
<input type="checkbox"/>	31074	Commercial Driving School of NY (Provider not on E	Bronx	Private
<input type="checkbox"/>	20616	Commercial Press	Canton	Private
<input type="checkbox"/>	39213	CommerciaSl Drivers License School, Inc	Menands	Private

25 Search Clear **Detail** Delete Selection Print List Correspond Show Contact **New**

Note that this search will only return Providers whose Status is **Active**. If you suspect a Provider to be in OSOS as **Inactive**, set the Status field to blank and search again. The Provider can be reactivated from the Provider Detail, Gen'l Info tab. Note that this search also picked up another Provider, Commercial Press, which can be ignored.

Other search criteria can also be used if you are returning to a previously identified record or if you are searching for Providers in a certain area. For example, the OSOS ID field allows you to retrieve a specific Provider record by the Provider ID, much like the Customer ID (NY#####) allows you to retrieve a particular customer.

You may also choose to search by WIB or city. Be aware that this type of search is not recommended when checking to see if a new Provider record should be created.

THE PROVIDER DETAIL SECTION

General Info Tab

The **General Info** tab is comprised of 3 sections: **Provider Info**, **Billing Address** and **Locations**. The graphic above shows the basic information for the Provider and the Locations where this Provider offers services. **Provider Info** and **Billing Address** should reflect the primary location of the Provider, their “headquarters” or main billing address. Other satellite offices can be specified in **Locations**.

Fields of note in **Provider Info**:

- **Provider Status** - as with Customer records, Archived and Deleted status can only be used by WIA Central Security staff. **Inactive** status may be used **ONLY** when multiple records of a Provider are being consolidated and the “extras” cannot be deleted (see [Provider Consolidation to Eliminate Duplicate Records](#)).

- **Federal and State IDs** - optional, but users are encouraged to enter the numbers when available.
- **Organization Type** - choose one which best describes the Provider.

Provider Info

Provider Status: Active

Federal ID (FEIN):

State ID (EIN):

Organization Type: Private

Provider Name: Community college

Provider Phone: Non-profit

Provider URL: One-Stop local office

Provider Email: Other

Private (highlighted)

University

Vocational/Technical

- **Provider's Name** - this field will hold up to 80 characters (including spaces).
- **Phone number, URL and Email** - also optional but should be entered if available.

The **Billing Address** section should have the Provider's primary address listed. If there are satellite offices, they can be listed under **Locations**.

All Providers must have at least one **Location** for a new record to be created. This may be the Billing Address or some other locale. Additional Locations may be added to a Provider by any WIB. The example on page 10 shows a Provider with only one Location. The graphic below shows one with multiple Locations in multiple WIBs.

Provider Search | **Provider Detail** | Offering Search | Offering Detail

Commercial Driver Training, Inc. ID: 2046 1 of 1

General Info | Contact Info | Services | Service Performance | Comments

Provider Info

Provider Status: Active

Federal ID (FEIN):

State ID (EIN):

Organization Type: Private

Provider Name: Commercial Driver Training, Inc.

Provider Phone: 845-336-2300 Ext:

Provider URL: http://cdtschool.com

Provider Email: cdtwb@aol.com

Billing Address

Street Address (line1): 416 Old Neighborhood Road

Street Address (line2):

City: Kingston

State: New York

Zip Code: 12401

Locations

Location Name: Commercial Driver Training, Inc. - I

Street Address (line1): 416 Old Neighborhood Road

Street Address (line2):

City: Kingston

State: New York

Zip Code: 12401

Location Suffix:

WIB: Ulster County

Location

Commercial Driver Training, Inc. - Ulster

Commercial Driver Training, Inc. - Suffolk

Commercial Driver Training, Inc. - NYC

Commercial Driver Training, Inc. - Columbia-Greene

Commercial Driver Training, Inc. - Sullivan

Commercial Driver Training, Inc. - Oyster Bay

New Location | Delete Location | Copy Address | Show Deletes

Adding a New Location

By adding their own Location to the Provider, each WIB is able to create Offerings for their own use.

The screenshot displays the 'Provider Detail' page for 'Commercial Driver Training, Inc.' (ID: 2046). The 'Locations' section is highlighted with a red box. It contains the following fields:

- Location Name
- Street Address (line1)
- Street Address (line2)
- City
- State (New York)
- Zip Code
- Location Suffix
- WIB (NYSDOL - CO)

Below these fields is a list of existing locations with checkboxes:

- Commercial Driver Training, Inc. - Oyster Bay
- Commercial Driver Training, Inc. - Ulster
- Commercial Driver Training, Inc. - NYC
- Commercial Driver Training, Inc. - Hempstead
- Commercial Driver Training, Inc. - Suffolk
- Commercial Driver Training, Inc. - Columbia-Greene

At the bottom of the Locations section, there are buttons: 'New Location', 'Delete Location', 'Copy Address', and 'Show Deletes'. The 'New Location' button is highlighted with a red box.

Click on the **New Location** button on the lower left of this box. Enter the Provider's name in the **Location Name** field. This field holds up to 80 characters (including spaces).



It is **strongly** recommended that Providers with multiple locations and the same name have some sort of identifying "tag" to differentiate between the offices. For example, "Sunny Day One Stop – Maple Avenue" and "Sunny Day One Stop – Elm Street," or add the name of the LWIA, if multiple areas share the same Provider (see [Creating Offerings](#)).

If the Provider's name is long, it may be necessary to abbreviate in the **Location Name** field in order to add an identifying tag. For example: "Commercial Driver Training, Inc. - Ulster" could be abbreviated to "CDT – Ulster."

If the Location and the Billing Address are the same, click on the **Copy Address** button and click on **OK** to agree to overwrite the information. This will bring over the Billing Address information. If they are not the same, enter the appropriate address information. Click on **Save**.

Contact Info Tab

The **Contact Info** tab allows you to enter contact information for multiple staff within the same Provider and attach the contacts to a certain Location. In the graphic below, John Rayne is the contact attached to the Ulster Location of the Provider. Other contacts may be entered for other Locations, as well. The other contact listed, Ray Reed, is attached to the NYC Location. Up to 12 Provider Contacts may be listed.

CUSTOMER **PROVIDER** EMPLOYER STAFF HELP

Provider Search **Provider Detail** Offering Search Offering Detail

Commercial Driver Training, Inc. ID: 2046 1 of 1

General Info **Contact Info** Services Service Performance Comments

Contact Detail

● First Name Phone Ext.

● Last Name Fax

Title Email

Location ● Staff Assigned

	Name	Phone	Ext.	Fax	Email
<input checked="" type="checkbox"/>	Rayne, John B.	631-249-1330		631-249-0428	cdtwb@aol.com
<input type="checkbox"/>	Reed, Ray	718-661-9682		718-661-9692	cdtwb@aol.com

Services Tab

The **Services** tab is where all services a Provider offers are created or listed. Not all Services will be attached to all Locations. For example, looking at the graphic below, one WIB may only choose to create offerings for “A+ Professional” and “Class A” training, while another WIB creates Offerings for the whole list. How it is set up depends entirely on which training classes a given WIB is offering to its clients.

Provider Search **Provider Detail** Offering Search Offering Detail

Commercial Driver Training, Inc. ID: 2046 1 of 1

General Info Contact Info **Services** Service Performance Comments

Service Detail

- Service Category Training
- Service Type Occupational Skills Training
- Service Name 70 Hour Class A CDL Approved
- Description 70 Hour Class A CDL
- Service ID 15464 Training Credit Hours
- Total Service Length: Weeks 4 Days Hours
- O*Net Title
- CIP Code

	Category	Service Type	Service Name	Description
<input type="checkbox"/>	Training	Occupational Skills Training	70 Hour Class A CDL	70 Hour Class A CDL
<input type="checkbox"/>	Training	Occupational Skills Training	A+ Professional	
<input type="checkbox"/>	Training	Occupational Skills Training	Career Training I Tractor Trailer	Tractor Trailer Driver
<input type="checkbox"/>	Training	Occupational Skills Training	Career Training II Tractor Trailer	Tractor Trailer CDL Class A program 160
<input type="checkbox"/>	Training	Occupational Skills Training	Career Training II Tractor Trailer	Career Training II Tractor Trailer (PT)
<input type="checkbox"/>	Training	Occupational Skills Training	CDL B Course	CDL B Course
<input type="checkbox"/>	Training	Occupational Skills Training	Cdl Class "a" license w/ hazardous materials	Cdl Class "a" license w/ hazardous materials
<input type="checkbox"/>	Training	Occupational Skills Training	Class A	
<input type="checkbox"/>	Training	Occupational Skills Training	Class B	
<input type="checkbox"/>	Training	Occupational Skills Training	Combination Straight Truck & ...	Combination Straight Truck & ...

Adding Services to a Provider

Training services that are added to OSOS must be approved on the **Eligible Training Provider List** (found at: <https://applications.labor.ny.gov/ETPL/>). When entering Eligible Training Provider List (ETPL) services, be sure to open up the site to facilitate entering data into OSOS (see [OSOS and the ETPL](#)).

Check to be sure the Service is not already listed. If it is, perform an **Offering Search** to be sure an Offering does not already exist (see [Provider Offering Search Section](#)).

General Info **Contact Info** **Services** **Service Performance** **Comments****Service Detail**

● Service Category

● Service Type

● Service Name ● WIA Eligible Status

Description

Service ID Training Credit Hours

Total Service Length: Weeks Days Hours

O*Net Title

CIP Code

	Category	Service Type	Service Name	Description
<input type="checkbox"/>	Training	Occupational Skills Training	70 Hour Class A CDL	70 Hour Class A CDL
<input type="checkbox"/>	Training	Occupational Skills Training	Individualized Program	Individualized Program
<input type="checkbox"/>	Training	Occupational Skills Training	Career Training I Tractor Trailer	Tractor Trailer Driver
<input type="checkbox"/>	Training	Occupational Skills Training	Career Training II Tractor Trailer	Tractor Trailer CDL Class A program 160
<input type="checkbox"/>	Training	Occupational Skills Training	Class B	
<input type="checkbox"/>	Training	Occupational Skills Training	Class A	
<input type="checkbox"/>	Training	Occupational Skills Training	Truck Driver, Heavy	Truck Driver, Heavy
<input type="checkbox"/>	Training	Occupational Skills Training	Truck Driver, Light	Truck Driver, Light
<input type="checkbox"/>	Training	Occupational Skills Training	Straight Truck/Coach Bus	Combination Straight Truck and Coach B
<input type="checkbox"/>	Training	Occupational Skills Training	CDL B Course	CDL B Course

If it is not, click on **New Service** on the lower left of the screen. In the upper right of the Service Detail box, click on **Service**. This will open a dialog box called **Service Category/Type Selector**.

Service Category/Type Selector -- Web Page Dialog

Service Category/Type Selector

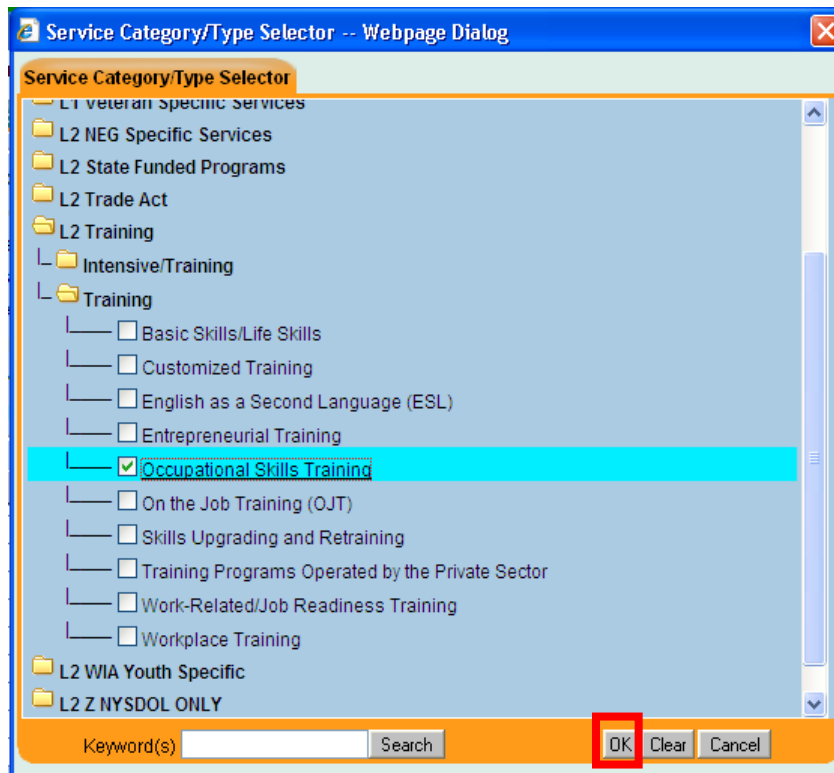
- L1 Staff Assisted Core
- L1 Staff Assisted Intensive
- L1 State Specific
- L1 Supportive Svcs / Need Related Pmts
- L1 Veteran Specific Services
- L2 NEG Specific Services
- L2 State Funded Programs
- L2 Trade Act
- L2 Training
- L2 WIA Youth Specific
- L2 Z NYSDOL ONLY

Keyword(s)

Click on the appropriate **L2 category**.



Reminder - Do not enter L1 Services in the Provider module!



The general category will open into one or more specific service type(s). Click on the one that best describes the service you want to create.



If you need assistance determining which category a given service may fall under, see **Definitions of L2 Services**. See also [L2 Service Types](#), below, for a general discussion of **L2 Service Types**.

Click on **OK** to choose the category and close the dialog box.

Commercial Driver Training, Inc. ID: 2046 1 of 1

General Info Contact Info **Services** Service Performance Comments

Service Detail

- Service Category: Training
- Service Type: Occupational Skills Training
- Service Name: Sample Service**
- WIA Eligible Status: Approved
- Description: Sample Service
- Service ID: [] Training Credit Hours: [] Programs: []
- Total Service Length: Weeks [] Days [] Hours []
- O*Net Title: [] O*Net Titles: []
- CIP Code: [] CIP Code: []

Category	Service Type	Service Name	Description
<input type="checkbox"/>	Occupational Skills Training	Tractor Driver, Light	Tractor Driver, Light
<input type="checkbox"/>	Occupational Skills Training	CDL B Course	CDL B Course
<input type="checkbox"/>	Occupational Skills Training	Career Training II Tractor Trailer	Career Training II Tractor Trailer (PT)
<input type="checkbox"/>	Occupational Skills Training	Modified Bus	Modified Bus
<input type="checkbox"/>	Occupational Skills Training	70 Hour Class A CDL	70 Hour Class A CDL
<input type="checkbox"/>	Occupational Skills Training	Career Training I Tractor Trailer	Tractor Trailer Driver
<input type="checkbox"/>	Occupational Skills Training	Straight Truck/Coach Bus	Combination Straight Truck and Coach B
<input type="checkbox"/>	Occupational Skills Training	Cdl Class "a" license w/ hazardous mate	Cdl Class "a" license w/ hazardous mate
<input type="checkbox"/>	Occupational Skills Training	Commercial Drivers License (CDL)	Commercial Drivers License (CDL)
<input type="checkbox"/>	Skills Upgrading and Retraining	Refresher Class L2 Intensive	CDL Refresher

New Service Delete Service Print Service New Offering Show Deletes

Save Print Return to Search Post a Note

Enter a name for the service in the **Service Name** field. For ETPL services, copy and paste the name of the service from the ETPL. Enter a description of the service in the **Description** field. This may be just the name of the service or a brief description. This field holds up to 200 characters (including spaces). The ETP description may also be used by copying and pasting the description.

If you have entered a Training service (i.e. a service whose completion **is intended to lead to a credential**), including OJT or Customized Training, change the **WIA Eligible Status** field to **Approved**.

Service Detail

- Service Category: []
- Service Type: [] Service: []
- Service Name: []
- WIA Eligible Status: Approved**
- Description: []
- Service ID: [] Training Credit Hours: [] Programs: []

Click on **Save** in the bottom left of the screen. The Service will not be available to attach to a client record until an **Offering** is created (see [Creating Offerings](#)).

L2 Service Types

- **L2 NEG Specific Services** - the **National Emergency Grant** (NEG) is given to areas for specific emergencies. The collapse of Carrier in the central New York triggered an NEG for certain WIBs. This Service Type should **only** be used if a WIB has received one of these grants.
- **L2 State Funded Programs** - State funded programs include Displaced Homemaker Programs and Chamber of Commerce On-the-Job training programs, which are funded from State, not Federal, funds. These programs count toward statewide performance but not a WIB's local performance, unless a customer is co-funded with WIA local program dollars.
 - The L2 State Funded Service Type must **NOT** be used for WIA or Trade Act Services.
- **L2 Trade Act** - Trade Act services are provided to those customers who are eligible for Trade benefits as determined by USDOL. These Service Types can be set up as Services under the agency providing Trade Act funded services, usually the One Stop.
- **L2 Training** - it is very important when setting up training services to choose the correct **Service Type**. Under the category **L2 Training**, you will find two sub-categories: **Intensive/Training** and **Training**.
 - **Intensive/Training** - the three choices listed, **Academic Learning, Literacy Training** and **Mobility Training**, may count as either an Intensive service or a Training service, depending on what **Program Service Type** (PST) is chosen when the service is attached to a customer. If the PST is set as **ITA Training or Non-ITA Training**, it will trigger OSOS to look for a credential on the Outcomes tab. Choosing a PST of **Intensive** will not trigger the credential flag.
 - **Training** - all of the choices listed will trigger the credential flag no matter what PST is chosen in the customer record, **EXCEPT Basic Skills / Life Skills, English as a Second Language (ESL) and Work-Related / Job Readiness Training**. These three Service Types can be used in the same manner as the Intensive/Training choices, triggering the credential flag if the PST is ITA Training or Non-ITA Training, or not if the PST is Intensive.
 - This allows for the flexibility to record all Training, whether it leads to a certificate/credential or not.
- **L2 WIA Youth Specific** - at a minimum, the 10 required elements of the Youth Program should be created for a Youth Provider. Other Youth services may be created as needed and appropriate.

Service Performance Tab

This tab is not generally used; however, it provides a place to keep track of statistics for individual Services given by a Provider. This must be manually maintained.

The screenshot shows the 'Service Performance' tab for 'Commercial Driver Training, Inc.' (ID: 2046). The 'Performance Detail' section includes input fields for Service Name (Truck Driver, Heavy), Average Starting Wage, Completion Rate, Entered Employment Rate, Unsubsidized Employment Retention Rate, Rate of Licensure, Rate of Skill Attainment, and Rate of Certification. Below this is a table with columns for Service Name, Comp%, Empl%, Retn%, Avg. Wage, Lics%, Skil%, and Cert%. The 'Truck Driver, Heavy' row is selected. At the bottom, there are buttons for 'Print Service Performance' and 'Show Deletes'.

Service Name	Comp%	Empl%	Retn%	Avg. Wage	Lics%	Skil%	Cert%
<input type="checkbox"/> 70 Hour Class A CDL							
<input type="checkbox"/> Individualized Program							
<input type="checkbox"/> Career Training I Tractor Trailer							
<input type="checkbox"/> Career Training II Tractor Trailer							
<input type="checkbox"/> Class B							
<input type="checkbox"/> Class A							
<input checked="" type="checkbox"/> Truck Driver, Heavy							
<input type="checkbox"/> Truck Driver, Light							
<input type="checkbox"/> Straight Truck/Coach Bus							
<input type="checkbox"/> CDL B Course							
<input type="checkbox"/> Cdl Class "a" license w/ hazardous mater							
<input type="checkbox"/> A+ Professional							
<input type="checkbox"/> Commercial Drivers License (CDL)							
<input type="checkbox"/> Career Training II Tractor Trailer (PT)							

Comments Tab

The Comments tab is used like the other Comments sections in OSOS. Click on the **Comments** button in the bottom right and then save, to leave a comment about a Provider.

The screenshot shows the 'Comments' tab for 'Commercial Driver Training, Inc.' (ID: 2046). The 'Comments' button is highlighted with a red box. Below the tab is a table with columns for Created, Staff Assigned, and Comments. At the bottom, there are buttons for 'Edit Comment', 'Delete Comment', 'Print Comments', 'Save', 'Print', 'Return to Search', and 'Comments'. A red arrow points to the 'Comments' button.

Created	Staff Assigned	Comments
<input type="checkbox"/>		

THE PROVIDER OFFERING SEARCH SECTION

An **Offering Search** should be run before adding offerings to an existing Provider, especially if multiple users are able to access the Provider module. This will help prevent duplication of the offering. This is the same process followed when scheduling a Service in a customer's record.

On the top blue bar, click on **Offering Search**. Click on the **General Info** tab to bring up the search fields. **Quick Search** is not used for this process.

The screenshot displays the OSOS Provider Module interface. At the top, there are five green navigation buttons: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these is a blue bar with four tabs: Provider Search, Provider Detail, Offering Search (highlighted with a red box), and Offering Detail. Underneath the blue bar are three sub-tabs: Quick Search, General Info (highlighted with a yellow arrow), and Custom. The main content area is light blue and contains a form for entering offering IDs. The form is titled "Offering ID" and has nine input fields labeled ID 1 through ID 9. Below the input fields is a table with columns: Provider Name, Provider Service Name, Location, Start Date, Start Time, End Date, and End Time. At the bottom of the interface is an orange bar with a dropdown menu set to "25" and several buttons: Search, Clear, Detail, Delete, Print List, and Schedule.

The WIB you are assigned to will automatically appear in the WIB drop-down. In the **Provider Name** field, enter the first few letters of the name of your Provider. For example, if you wished to search for Joe's School of Mechanics, you would only need to type "joe" in the Provider Name field. In the screen shot below, "commer" has been entered to search for Commercial Driver Training Providers.

If you are searching for specific services, in the Service Name field you may also enter the first few letters of the **Service Name**.

The screenshot shows the OSOS Provider Module search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (highlighted), and Offering Detail. The page number '1 - 2 of 2' is displayed in the top right. The main search area is titled 'Offering Search' and includes a 'Custom' filter. The search criteria are as follows:

- Location:** WIB dropdown set to 'Ulster County', City field empty.
- Start Date Range:** From and To fields empty.
- Provider Information:** Provider Name field contains 'commer', Service Name field empty, Program dropdown empty. Provider Status is set to 'Active'. Service Type field empty.

The search results are displayed in a table with the following data:

<input type="checkbox"/>	Provider Name	Provider Service Name	Location	Start Date	Start Time	End Date	End Time
<input type="checkbox"/>	Commercial Driver Training, Inc.	70 Hour Class A CDL	Kingston				
<input checked="" type="checkbox"/>	Commercial Driver Training, Inc.	Individualized Program	Kingston				

At the bottom of the search area, there is a '25' dropdown, a 'Search' button (highlighted with a red box), and buttons for 'Clear', 'Detail', 'Delete', 'Print List', and 'Schedule'.

Click **Search**.

Notice that despite many Services listed for this Provider (see [graphic](#)), only two Offerings have been created by this particular WIB. To view more specific information about a given Offering, click on it once to hi-light and then click on the **Detail** button.

THE PROVIDER OFFERING DETAIL SECTION

CUSTOMER **PROVIDER** **EMPLOYER** **STAFF** **HELP**

Provider Search Provider Detail Offering Search **Offering Detail**

Individualized Program Offering ID: 14766 1 of 1

General Info

Provider Info

Provider Name: Commercial Driver Training, Inc.
Service Category: Training
Service Type: Occupational Skills Training
Service Description: Individualized Program

Location

Location: Commercial Driver Training, Inc. - Ulster
Address: 416 Old Neighborhood Road
City: Kingston State: New York
Zip: 12401 WIB: Ulster County

Schedule

Start Date: End Date:
Start Time: End Time:
Sun. Mon. Tue. Wed. Thu. Fri. Sat.

Additional Info

Cost: \$ 1.00 Total Seats: Available Seats:
Description:

Save Single Save Ongoing Provider Services Return to Search

This graphic shows the Detail for an existing Offering for the Provider in the Ulster location.

Creating Offerings

It is always a good idea when dealing with existing Providers and Services, to check for existing Offerings before creating new ones. This can be done in the Offering Search section of the Provider module (see [Provider Offering Search Section](#)). This is not necessary, however, when working with a new Provider.

An Offering should be linked to a Service as soon as the Service is created, otherwise it will not be available to add to a customer's record. An exception would be if a new Location is added to the Provider at a later date, which could require additional offerings to be entered for existing Services at that time.

General Info Contact Info **Services** Service Performance Comments

Service Detail

- Service Category: Training
- Service Type: Occupational Skills Training
- Service Name: Truck Driver, Light
- WIA Eligible Status: Approved
- Description: Truck Driver, Light
- Service ID: 48915
- Training Credit Hours: []
- Programs: []
- Total Service Length: Weeks [] Days [] Hours []
- O*Net Title: []
- CIP Code: []

Category	Service Type	Service Name	Description
<input type="checkbox"/>	Training	Occupational Skills Training	Intermediate Training II
<input type="checkbox"/>	Training	Occupational Skills Training	Career Training II Tractor Trailer
<input type="checkbox"/>	Training	Occupational Skills Training	Intermediate Training II - CDL A
<input type="checkbox"/>	Training	Occupational Skills Training	Combination Straight Truck & Co
<input type="checkbox"/>	Training	Occupational Skills Training	Class B
<input type="checkbox"/>	Training	Occupational Skills Training	Class A
<input type="checkbox"/>	Training	Occupational Skills Training	Truck Driver, Heavy
<input checked="" type="checkbox"/>	Training	Occupational Skills Training	Truck Driver, Light
<input type="checkbox"/>	Training	Occupational Skills Training	CDL B Course
<input type="checkbox"/>	Training	Occupational Skills Training	Class B CDL

New Service Delete Service Print Service **New Offering** Show Deletes

Save Print Return to Search Comments

Click once on the **Service** to which you wish to add an Offering. Click on the **New Offering** button on the lower right of the screen. This will open the **Offering Detail** screen.

CUSTOMER PROVIDER EMPLOYER **STAFF** HELP

Provider Search Provider Detail Offering Search **Offering Detail**

Truck Driver, Heavy Offering ID:

General Info

Provider Info

- Provider Name: Commercial Driver Training, Inc.
- Service Category: Training
- Service Type: Occupational Skills Training
- Service Description: Truck Driver, Heavy

Location

- Location: []
- Address: 416 Old Neighborhood Road
- City: Kingston State: New York
- Zip: 12401 WIB Ulster County

Schedule

- Start Date: [] End Date: []
- Start Time: [] End Time: []
- Sun. Mon. Tue. Wed. Thu. Fri. Sat.

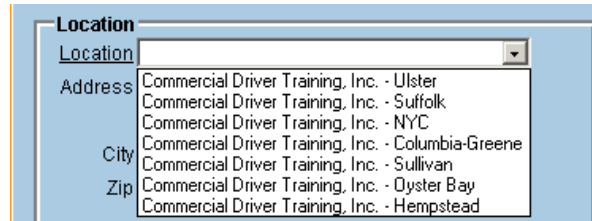
Additional Info

- Cost: [] Total Seats: [] Available Seats: []
- Description: []

Save Single Save Ongoing Provider Services Return to Search

Note that certain information is brought over from the **Provider Detail** section, such as the **Service Category, Type and Description**, and the address of the Location listed first in the **Locations** listings. The **Service Name** is listed at the top.

In the **Location box**, use the Location drop-down menu to choose the office to which the offering is being attached.



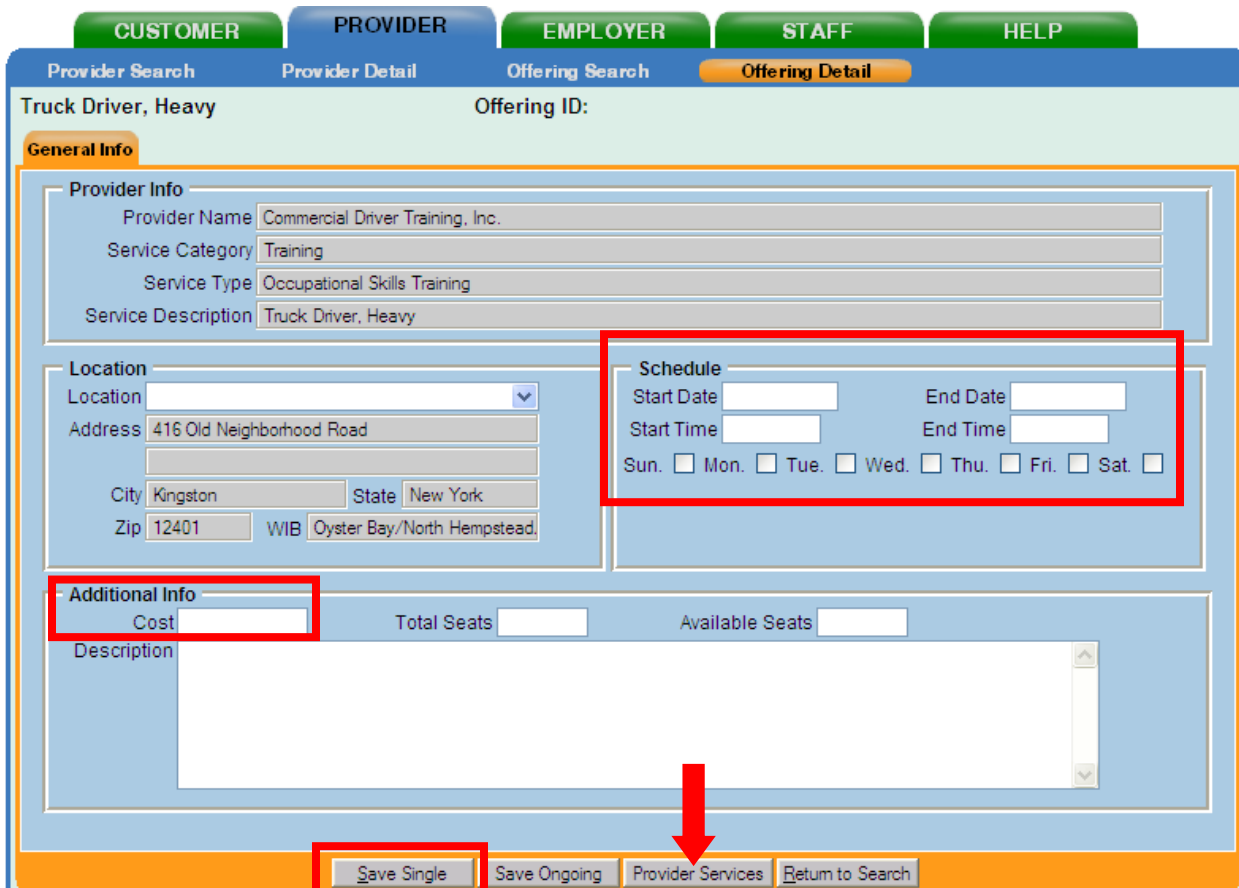
Location
Location [dropdown]
Address [text]
City [text]
Zip [text]

- Commercial Driver Training, Inc. - Ulster
- Commercial Driver Training, Inc. - Suffolk
- Commercial Driver Training, Inc. - NYC
- Commercial Driver Training, Inc. - Columbia-Greene
- Commercial Driver Training, Inc. - Sullivan
- Commercial Driver Training, Inc. - Oyster Bay
- Commercial Driver Training, Inc. - Hempstead

It was recommended, in the [Adding a New Location](#) section to differentiate between multiple locations with the same name. It is at this step in creating an Offering that having a distinct name for each location is crucial.



Without distinct names for each location, you will not be able to distinguish which is the appropriate location in the drop-down menu.



CUSTOMER PROVIDER EMPLOYER STAFF HELP

Provider Search Provider Detail Offering Search **Offering Detail**

Truck Driver, Heavy Offering ID:

General Info

Provider Info
Provider Name: Commercial Driver Training, Inc.
Service Category: Training
Service Type: Occupational Skills Training
Service Description: Truck Driver, Heavy

Location
Location: [dropdown]
Address: 416 Old Neighborhood Road
City: Kingston State: New York
Zip: 12401 WIB: Oyster Bay/North Hempstead

Schedule
Start Date: [text] End Date: [text]
Start Time: [text] End Time: [text]
Sun. Mon. Tue. Wed. Thu. Fri. Sat.

Additional Info
Cost: [text] Total Seats: [text] Available Seats: [text]
Description: [text area]

Save Single Save Ongoing Provider Services Return to Search

Do **not** enter Start and End Dates and Times in the **Schedule** box. Click on **at least one** day of the week in the Schedule box. In the **Additional Info** box, add "1" to the **Cost** field. Leave the **Total Seats** and **Available Seats** fields empty.

Click on the **Save Single** button on the lower left of the screen (**do not use Save Ongoing**). To return to the Provider Services screen, click on the **Provider Services** button. Repeat for the next Service, if needed.

DELETING OR DISCONTINUING ITEMS FROM THE PROVIDER MODULE

Deleting items from the Provider module is very similar to deleting from a Customer's record. The items must be deleted in the **reverse order** they were entered. All Offerings attached to a Service must be deleted before the Service itself can be deleted. All Services must be deleted from a Provider before the Provider can be deleted. If an Offering has been used and is attached to customer records, OSOS will not allow it to be deleted, which will prevent deletion of the Service and the Provider. If an item cannot be deleted, it should be discontinued.



Do not, under any circumstances, delete or change the Provider information of another WIB without their consent and cooperation.

To discontinue a Provider, as part of consolidation or if the LWIA is no longer using the Provider, it is necessary to flag those Offerings, Services and Providers which are no longer to be used. The method recommended by OSOS Central Security is to change the name of the service by adding **zDNUz** as a prefix (which stands for **Do Not Use**). For example, **Case Management** would become **zDNUzCase Management**. Adding the letter "z" makes the service drop to the bottom of the list when alphabetizing search results. Details are described below in the "Discontinuing" sections.

Deleting an Offering

1. Search for the Offering you wish to delete (see [Provider Offering Search Section](#)).
2. Click once on the **Offering** you wish to delete to hi-light.
3. To delete the Offering, click on the **Delete** button at the bottom of the screen.
4. Click on **Return to Search** button and move to the next offering to be deleted and repeat.
5. If the **Delete** button is grayed out, the Offering is connected to customers and cannot be deleted. See **Discontinuing an Offering**, below.

Discontinuing an Offering

1. Search the Offering you wish to discontinue (see [Provider Offering Search Section](#)).
2. Click once on the **Offering** you wish to discontinue to hi-light.
3. Click on **Detail**.
4. On the **Offering Detail** screen, remove the \$1 from the **Cost** field, and any data in the **Scheduling** section (Start Date or End Date or Times), so all the fields are blank. Leave at least one day of the week checked off. Click on the **Save Single** button.
5. Click on **Return to Search** button and move to the next offering to be discontinued and repeat.

Deleting a Service

1. Perform an Offering search to be sure all Offerings associated with the Service have been deleted (see **Deleting an Offering**, above).
2. Go to the **Provider Detail** section, **Services** tab.
3. Click once on the **Service** you wish to delete to hi-light.
4. Click on the **Delete Selection** button. Click on **OK** to delete the Service.
5. Click on **Save**.
6. If the **Delete** button is grayed out, the Service cannot be deleted. See **Discontinuing a Service**, below.

Discontinuing a Service

1. Click once on the **Service** that needs to be discontinued.
2. Click on the **Service Name** field and add **zDNUz** to the beginning of the Service name.
3. Make the **WIA Eligible Status** field **Suspended**.
4. Click on **Save**.

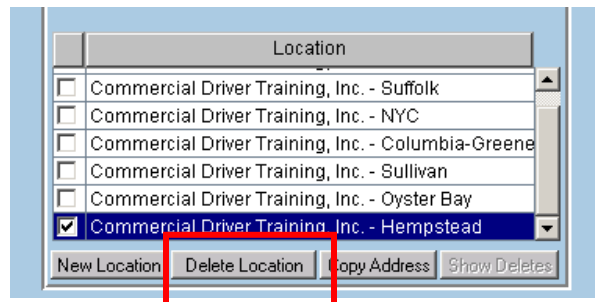
Discontinuing a Location

A location should be inactivated when no Services are being provided at that location. This is **not** the same as inactivating or deleting the Provider.



Never inactivate or delete a location which is assigned to another WIB!

1. On the **General Info** tab of the Provider Detail section, click on the **Location** in the upper right corner that needs to be inactivated.
2. Add **zDNUz** to the beginning of the Location Name field.
3. Click on **Save**.
 - Note that it is possible to delete a Location, as long as it has not been used to create an Offering.
 - Click on the Location to be deleted.
 - If the **Delete Location** button is **NOT** grayed out, the Location has not been used and may be deleted.



Deleting a Provider



Only delete a Provider whose locations are all in your WIB. If you feel another WIB's data is in error, contact the WIB and let them know or contact OSOS Central Security. **Do not, under any circumstances, delete or change the Provider information of another WIB without their consent and cooperation.**

1. Search for and retrieve the Provider you wish to delete.
2. Remove or discontinue all Offerings as described above.
3. Remove or discontinue all Services as described above.
4. Click on the **Delete Selection** button.
5. Click on **OK** to delete the Provider.
6. Click on **Save**.

Discontinuing a Provider

1. Remove or discontinue all Offerings, as described above.
2. Remove or discontinue all Services, as described above.
3. On the General Information tab, add **zDNUz** to the beginning of the Provider's name.
4. Click on **Save**.

PROVIDER CONSOLIDATION TO ELIMINATE DUPLICATE RECORDS

When a Provider is found to have multiple records, the information must be consolidated into one record and the other records deleted or discontinued. For Providers with Locations in multiple WIBs, this process **must** be coordinated with all the WIBs affected and WIA Central Security.




Do not, under any circumstances, delete or change the Provider information of another WIB without their consent and cooperation.

You may, however, consolidate a Provider with only your Location into a Provider record with multiple WIBs.

Steps to Consolidation

- 1) Determine how many records exist for the Provider, for example Commercial Driver Training.
 - Perform a Provider search (see [Provider Search Section](#)). You may need to perform more than one search if the Provider may be listed under another name or acronym.
 - The first search, using “commer” as the search criteria, returned 4 Provider IDs. A second search, using “the”, returned one.



<input type="checkbox"/>	Provider ID	Provider Name	City	Organization Type
<input checked="" type="checkbox"/>	4141	Commercial Driver Training	Kingston	Private
<input checked="" type="checkbox"/>	2046	Commercial Driver Training, Inc.	Kingston	Private
<input checked="" type="checkbox"/>	2047	Commercial Drivers License School, Inc.	Menands	Private
<input type="checkbox"/>	31074	Commercial Driving School of NY (Provider not on E	Bronx	Private
<input type="checkbox"/>	20616	Commercial Press	Canton	Private
<input type="checkbox"/>	65104	Commercial Travelers	Utica	
<input checked="" type="checkbox"/>	39213	Commercia Drivers License School, Inc.	Menands	Private

<input type="checkbox"/>	Provider ID	Provider Name	City	Organization Type
<input type="checkbox"/>	47757	The After School Corp. (TASC)	New York	Non-profit
<input type="checkbox"/>	36050	The Arc of Monroe County	Rochester	
<input type="checkbox"/>	60073	The Art Insitute of New York City	New York	Other
<input type="checkbox"/>	51862	The Buffalo Debt Collection and Customer Service A	Lackawanna	Non-profit
<input checked="" type="checkbox"/>	16389	The CDL School Inc.	Menands	Private
<input type="checkbox"/>	38352	The CFA/CADD Training School	New York	Private
<input type="checkbox"/>	36120	The Car Connection	Middleville	Other
<input type="checkbox"/>	36120	The Career Center	New York	Private

- It is a good idea to make a list of the **OSOS Provider ID numbers** and the **exact name of the Provider**, or print out the lists with the Print List button, so that all records can be accounted for, especially if they are drawn off of multiple searches.

- 2) Review each record to determine which records can be safely consolidated.
 - Look for records where all Locations are within your WIB.
 - Do not delete or deactivate records with Locations belonging to other WIBs.
- 3) Review each of the remaining records to determine which would be the best to designate as the “official” record.
 - It is best to choose the record with the most information, as the duplicate data may already exist in the official record.
 - Make a note of the Provider ID number of the record you designate as official, as you will be returning to it often. The graphic below shows the field on the Provider Search tab which allows you to search by Provider ID.

The screenshot shows the 'Provider Search' interface with a 'Custom' tab selected. The 'OSOS ID' field is highlighted with a red box. Other fields include 'Status' (Active), 'WIB', 'Provider Name', 'City', 'Service Category', 'Service Type', 'CIP Code', 'Organization Type', 'Federal Provider ID (FEIN)', and 'State Provider ID (EIN)'. There are also buttons for 'Service Type' and 'CIP Code'.

- 4) Carefully compare the duplicate record to the official record before beginning data transfer.
 - It is helpful to have two sessions of OSOS open for this step, to more easily switch between the duplicate and official records.
 - Watch for the following:
 - **Locations which are named differently but have the same street address.** Confirm whether the offices are actually different or if the office is known by multiple names.
 - **Services which are named the same or are a variant.** For example, Microsoft Word Level 1 may be listed as MS Word 1. If a variant exists, do not enter the Service again - use the variant.
 - Services may be edited for more accurate names, but be certain that your edits make the record clear. Changing the name of an existing service to your local variant may confuse other areas which may also use this service.
- 5) Begin transferring data from the duplicate records to the official record. Do **NOT** try to delete or deactivate any information at this point.
 - Data which should be transferred to the official record include (see [Provider Detail Section](#) for instructions on adding data to a Provider record):
 - **Locations**
 - **Contact Information**
 - **Services** - Remember to add new Offerings to the Services that already exist in the official record.
 - **Comments** - if there are pertinent Comments, they may be copied and pasted into the official record. Because the Comments are dated automatically with the current date, be sure to add the original date to the Comment when you paste it.
- 6) Once all pertinent data has been transferred to the official record, deletion or deactivation of the duplicate record(s) must be done (see [Deleting or Discontinuing Items from the Provider Module](#) for details of this process).

OSOS AND THE ELIGIBLE TRAINING PROVIDER LIST (ETPL)

Training providers who are eligible to receive Individual Training Accounts (ITAs) through WIA Title I-B funds are listed on the Eligible Training Provider list (ETP), located at: <https://applications.labor.ny.gov/ETPL/>.

When a Provider is approved on the ETP, an entry is made for them in OSOS by WIA Central staff. Field staff are then able to retrieve the record and add Services and Offerings. If you cannot find a Provider in OSOS who has been approved on the ETP, be sure and contact WIA Central Security staff.

More information on the ETP can be found at the above-mentioned website or contact Catherine Laccetti at ETP@labor.ny.gov.

RESOURCES

Additional **desk guides and resources**, found at: <http://www.labor.ny.gov/workforcenypartners/tools.shtm>.