

Creating Providers, Services and Offerings - OSOS Guide



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PURPOSE

OSOS is a case management system designed to collect and report services provided to jobseekers and business customers. The provision of training programs to customers is recorded in OSOS by attaching services to a customer's record. In order for this to occur, the training provider, service, and offering must all be present in OSOS. This guide is intended to help staff understand how to search for and create providers, services and offerings in OSOS.

It will cover:

- Creating a Provider Record
- Creating a Service attached to the Provider Record
- Creating an Offering attached to the Provider Service

CREATING A PROVIDER

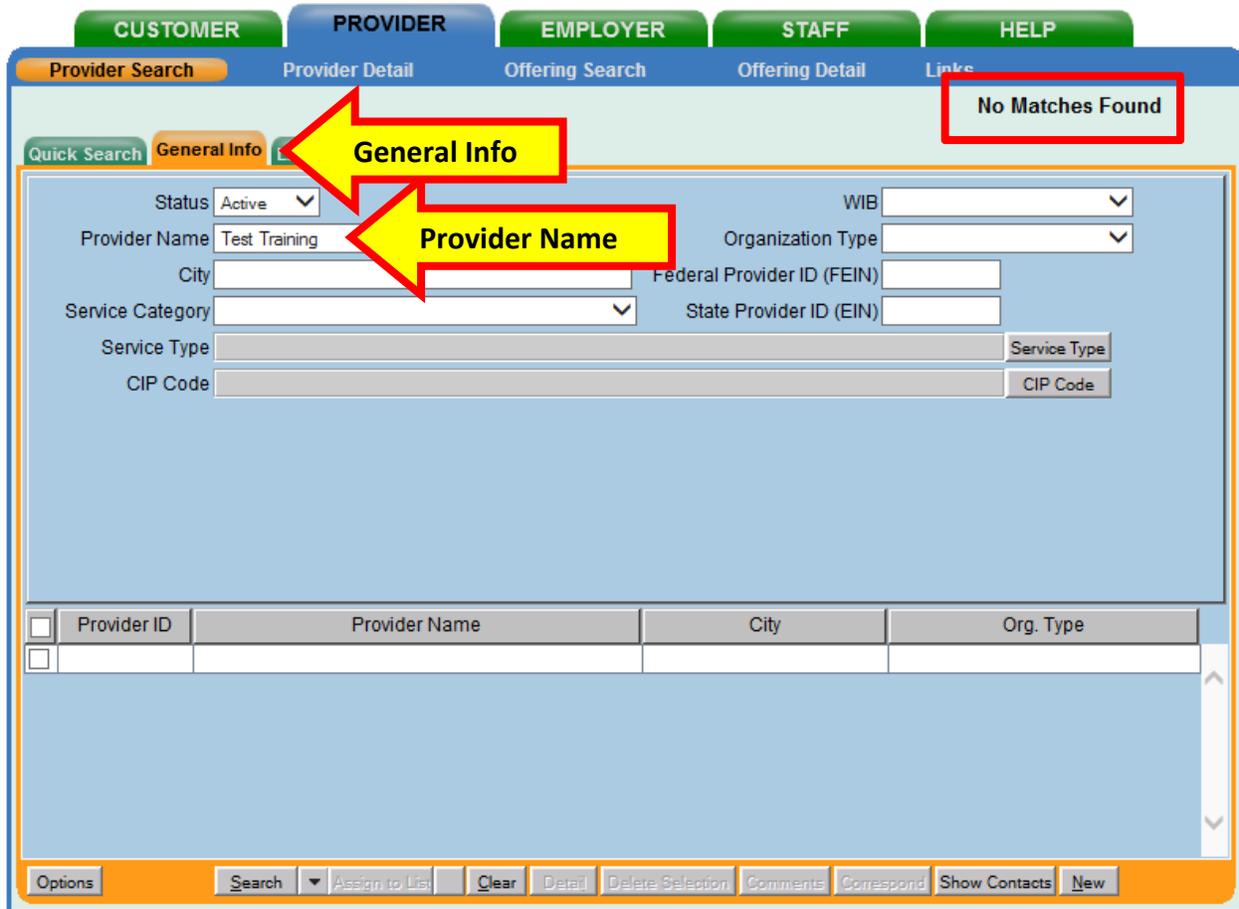
In order to record the provision of training programs in OSOS, there must first be a provider record. Some providers may already have a provider record in OSOS, having been auto-loaded from the Eligible Training Provider List (ETPL). If local areas intend to use WIOA funds to supplement or pay for the cost of training, they must first ensure that the provider is on the ETPL. Once on the ETPL, the provider and services will autoload in OSOS upon approval from the Local Workforce Development Area. If the provider is not already autoloading, the local area must create the provider record in OSOS.

Before creating a new provider record, search OSOS to see if a record already exists for that provider. To do this, navigate to the **Provider** module and then the **Provider Search** window. OSOS will automatically navigate to the **Quick Search** tab. Navigate to the **General Info** tab. Type in the Provider Name and click **Search** at the bottom of the screen.



When conducting a search using the Provider Name field, ensure that you are using the exact Provider Name. If your search returns “No Matches Found,” try variations of the Provider Name.

If the system displays **No Matches Found** at the top right of the screen, staff must create the provider record.



The screenshot shows the OSOS Provider Search interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search, Offering Detail, and Links. The 'General Info' sub-tab is selected. The form contains fields for Status (Active), Provider Name (Test Training), City, Service Category, Service Type, CIP Code, WIB, Organization Type, Federal Provider ID (FEIN), and State Provider ID (EIN). A red box highlights 'No Matches Found' in the top right corner. Yellow arrows point to the 'General Info' and 'Provider Name' fields. The bottom toolbar contains buttons for Options, Search, Assign to List, Clear, Detail, Delete Selection, Comments, Correspond, Show Contacts, and New.

To create a new provider record, click **New** at the bottom right of this screen.



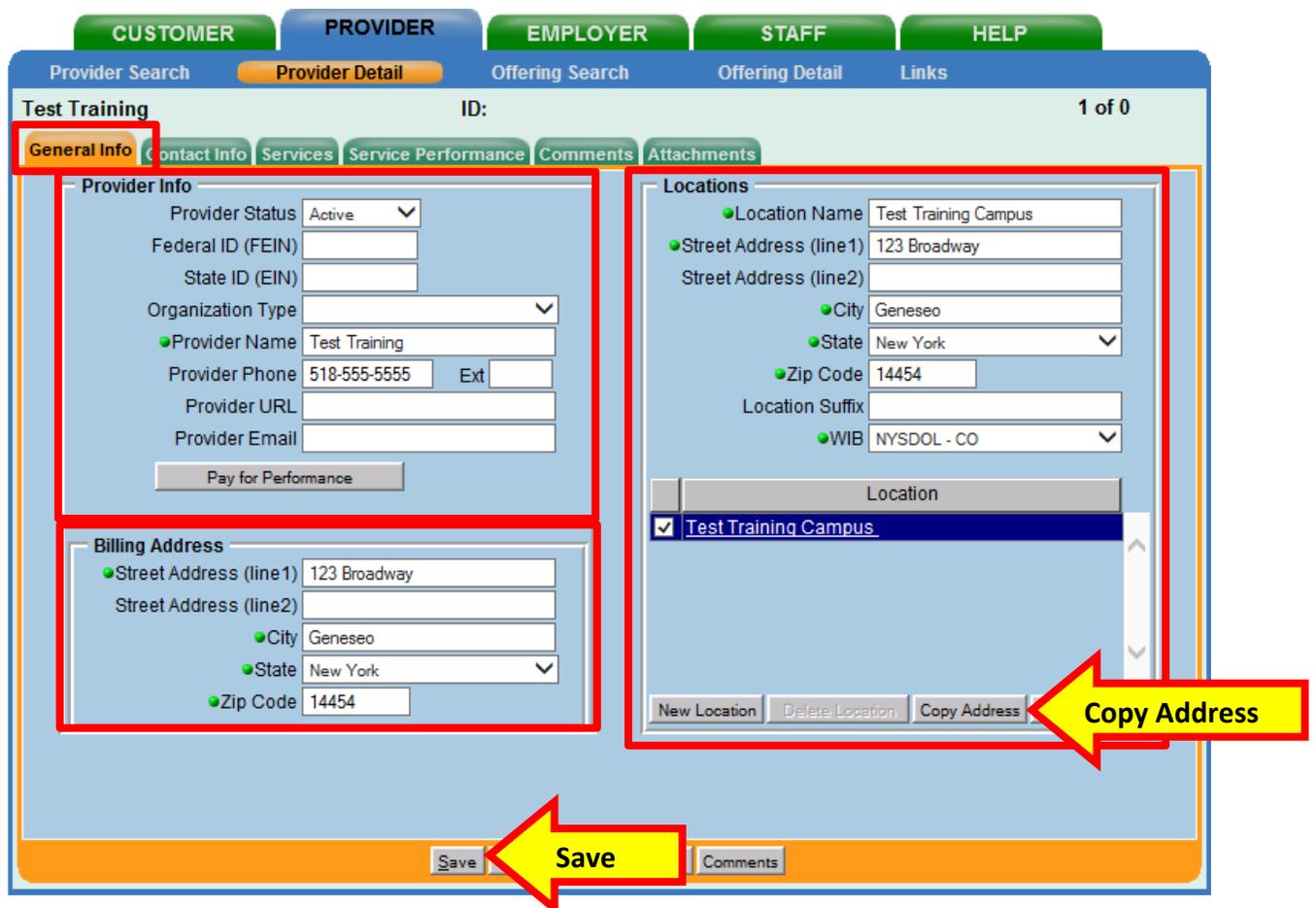
This close-up shows the bottom toolbar of the OSOS Provider Search window. The 'New' button is highlighted with a yellow arrow.

OSOS will automatically navigate **Provider** module, **Provider Detail** window, **General Info** tab.

Enter all known information in the **Provider Info** section on the left, including **Billing Address**. Only fields marked with a green dot are required. Next, click **New Location** and enter the physical location of the training provider in the **Locations** section. You may enter more than one location if necessary.

Tip: If the location address is the same as the address in **Provider Info**, use the **Copy Address** button to auto fill the address fields in the **Locations** section.

After all necessary information is entered, click **Save** at the bottom of the screen.

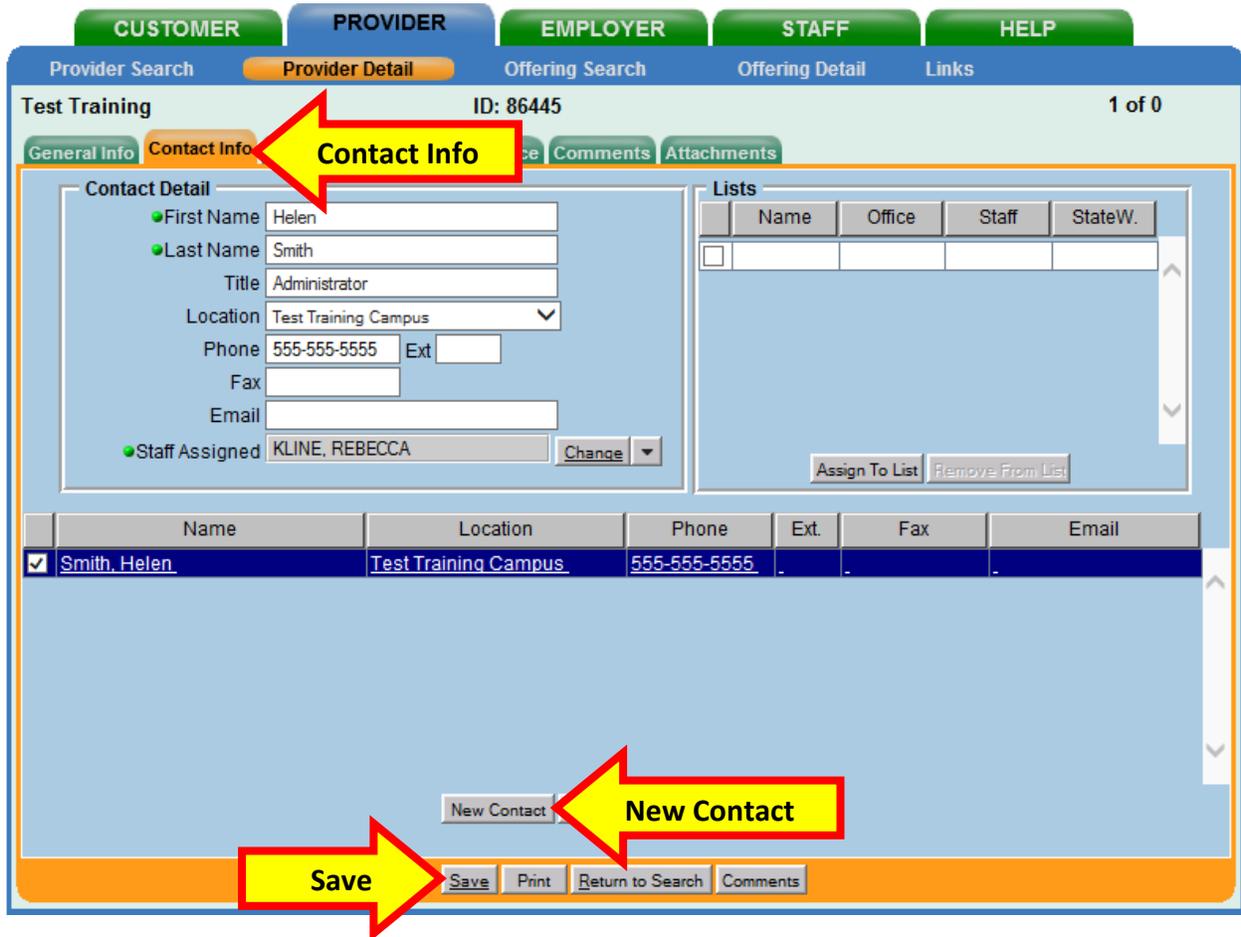


The screenshot displays the OSOS Provider Detail window for 'Test Training'. The interface includes a top navigation bar with tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with 'Provider Search', 'Provider Detail' (selected), 'Offering Search', 'Offering Detail', and 'Links'. The main content area is titled 'Test Training' and shows 'ID: 1 of 0'. A 'General Info' tab is selected, revealing two sections: 'Provider Info' and 'Billing Address'. The 'Provider Info' section contains fields for Provider Status (Active), Federal ID (FEIN), State ID (EIN), Organization Type, Provider Name (Test Training), Provider Phone (518-555-5555), Provider URL, and Provider Email. A 'Pay for Performance' button is located below these fields. The 'Billing Address' section contains fields for Street Address (line1: 123 Broadway), Street Address (line2), City (Geneseo), State (New York), and Zip Code (14454). To the right is the 'Locations' section, which includes fields for Location Name (Test Training Campus), Street Address (line1: 123 Broadway), Street Address (line2), City (Geneseo), State (New York), Zip Code (14454), Location Suffix, and WIB (NYS DOL - CO). A table below these fields lists the location 'Test Training Campus' with a checked checkbox. At the bottom of the Locations section are buttons for 'New Location', 'Delete Location', and 'Copy Address'. A yellow arrow points to the 'Copy Address' button. At the bottom of the main content area are buttons for 'Save' and 'Comments'. A yellow arrow points to the 'Save' button.

Click on the **Contact Info** tab.

Click **New Contact** and enter the appropriate contact information for the provider.

Click **Save**.



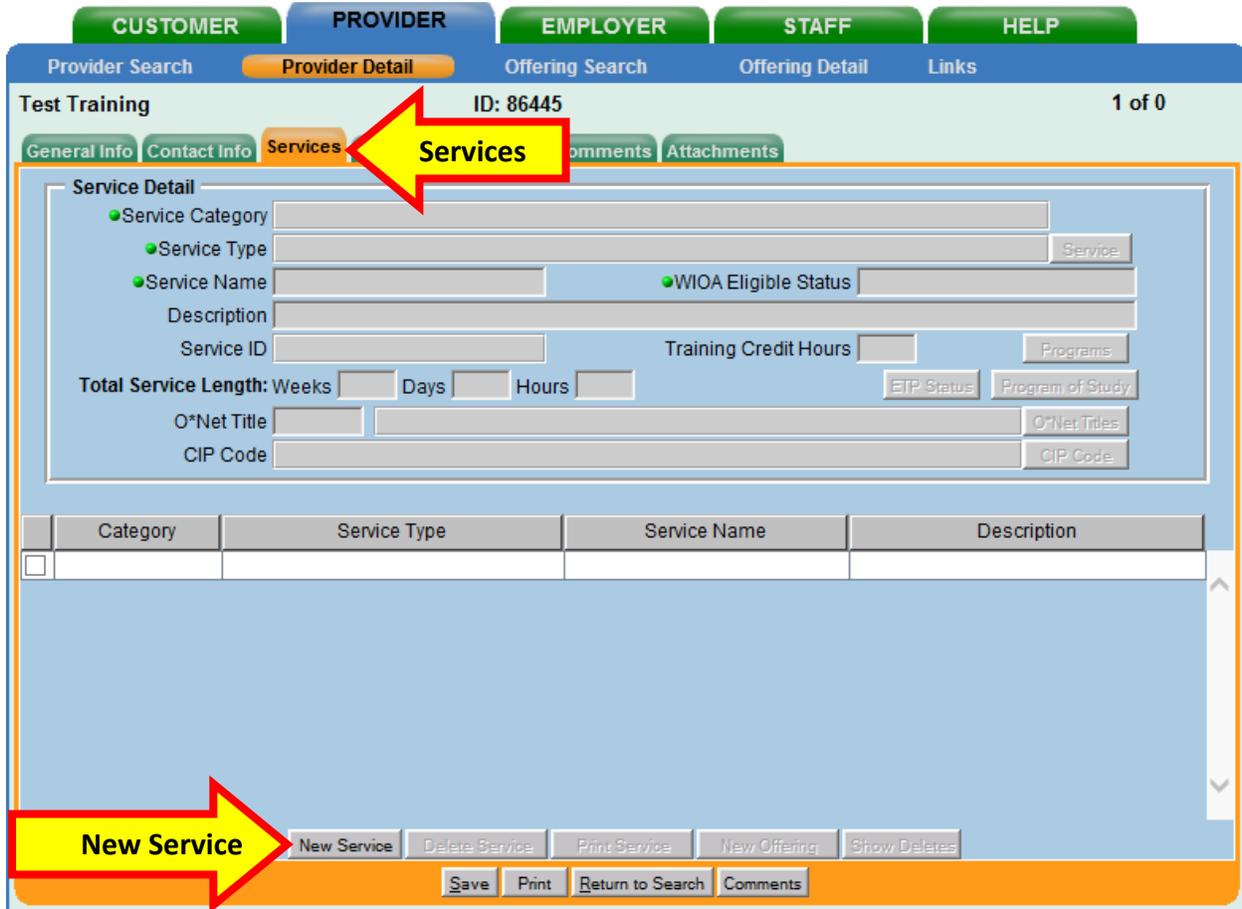
The screenshot shows the OSOS interface for managing providers. The top navigation bar includes tabs for CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below this is a sub-navigation bar with Provider Search, Provider Detail (selected), Offering Search, Offering Detail, and Links. The main content area is titled 'Test Training' with ID: 86445 and '1 of 0' items. The 'Contact Info' tab is selected and highlighted with a red arrow. The 'Contact Detail' form contains fields for First Name (Helen), Last Name (Smith), Title (Administrator), Location (Test Training Campus), Phone (555-555-5555), Ext., Fax, Email, and Staff Assigned (KLINE, REBECCA). A 'New Contact' button is highlighted with a red arrow. At the bottom, a 'Save' button is highlighted with a red arrow. A table below the form lists the contact information for Helen Smith at Test Training Campus.

Name	Location	Phone	Ext.	Fax	Email
<input checked="" type="checkbox"/> Smith, Helen	Test Training Campus	555-555-5555	-	-	-

CREATING A SERVICE

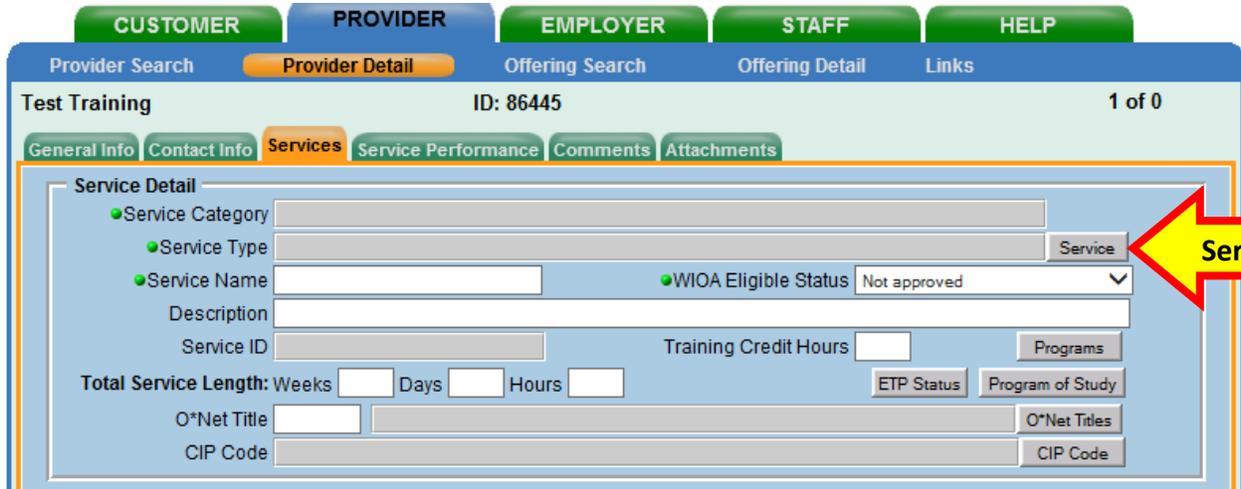
To record the delivery of training services to a customer, the services must be attached to the provider's OSOS record.

In the **Services** tab of the appropriate provider, click on the **New Service** button.



The screenshot shows the OSOS web application interface. At the top, there are navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail (selected), Offering Search, Offering Detail, and Links. The main content area is titled 'Test Training' with ID: 86445 and '1 of 0' items. The 'Services' tab is highlighted with a red arrow and labeled 'Services'. The 'Service Detail' section contains various input fields: Service Category, Service Type, Service Name, Description, Service ID, Training Credit Hours, Total Service Length (Weeks, Days, Hours), WIOA Eligible Status, EIP Status, Program of Study, O*Net Title, and CIP Code. Below the form is a table with columns: Category, Service Type, Service Name, and Description. At the bottom, there is a 'New Service' button highlighted with a red arrow and labeled 'New Service', along with other buttons: Delete Service, Print Service, New Offering, Show Deletes, Save, Print, Return to Search, and Comments.

Click **Service** on the right to search for and add a service type.



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

Test Training ID: 86445 1 of 0

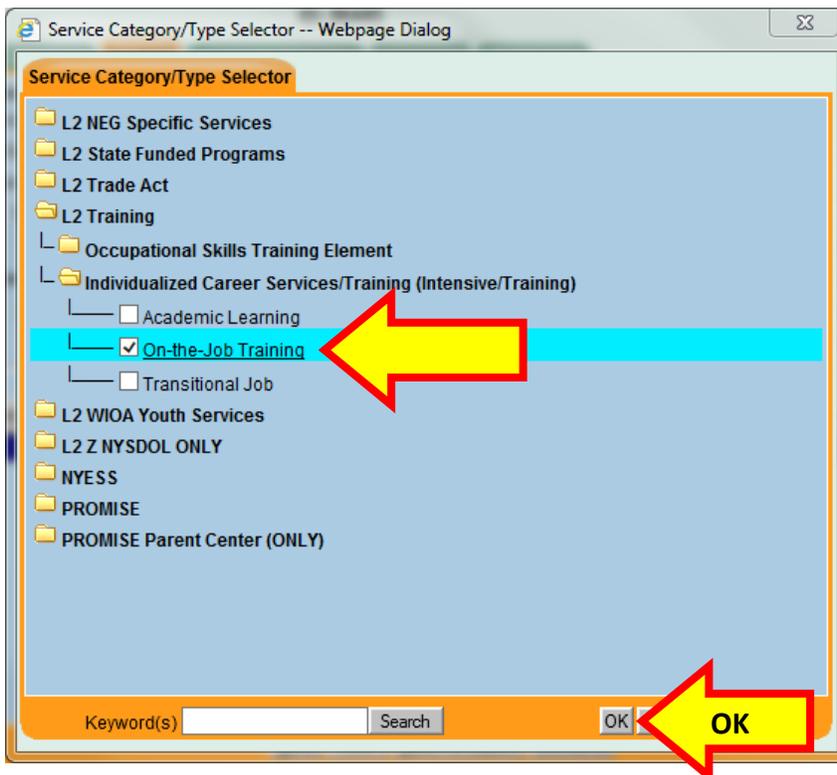
General Info | Contact Info | **Services** | Service Performance | Comments | Attachments

Service Detail

- Service Category
- Service Type
- Service Name
- WIOA Eligible Status: Not approved
- Description
- Service ID
- Training Credit Hours
- Programs
- Total Service Length: Weeks Days Hours
- ETP Status
- Program of Study
- O*Net Title
- O*Net Titles
- CIP Code
- CIP Code

To find a service, either type in a keyword in the search box at the bottom of the **Service Category/Type Selector** pop up window or find the service type by clicking on the nested folders.

After finding the appropriate service, check the corresponding box, and click **OK**.



Service Category/Type Selector -- Webpage Dialog

Service Category/Type Selector

- L2 NEG Specific Services
- L2 State Funded Programs
- L2 Trade Act
- L2 Training
 - Occupational Skills Training Element
 - Individualized Career Services/Training (Intensive/Training)
 - Academic Learning
 - On-the-Job Training**
 - Transitional Job
- L2 WIOA Youth Services
- L2 Z NYSDOL ONLY
- NYESS
- PROMISE
- PROMISE Parent Center (ONLY)

Keyword(s) Search



Enter the **Service Name**. This may be a job title or the name of the specific training.

Select "Approved" in the **WIOA Eligible Status** drop-down menu.



In order for a service to be added to an OSOS customer record, the training service must be WIOA Eligible. WIOA eligibility is determined by the Local Workforce Development Area (LWDA).

Enter a brief description in the **Description** field and click **Save**.

Service Name → **WIOA Eligible** → **Save**

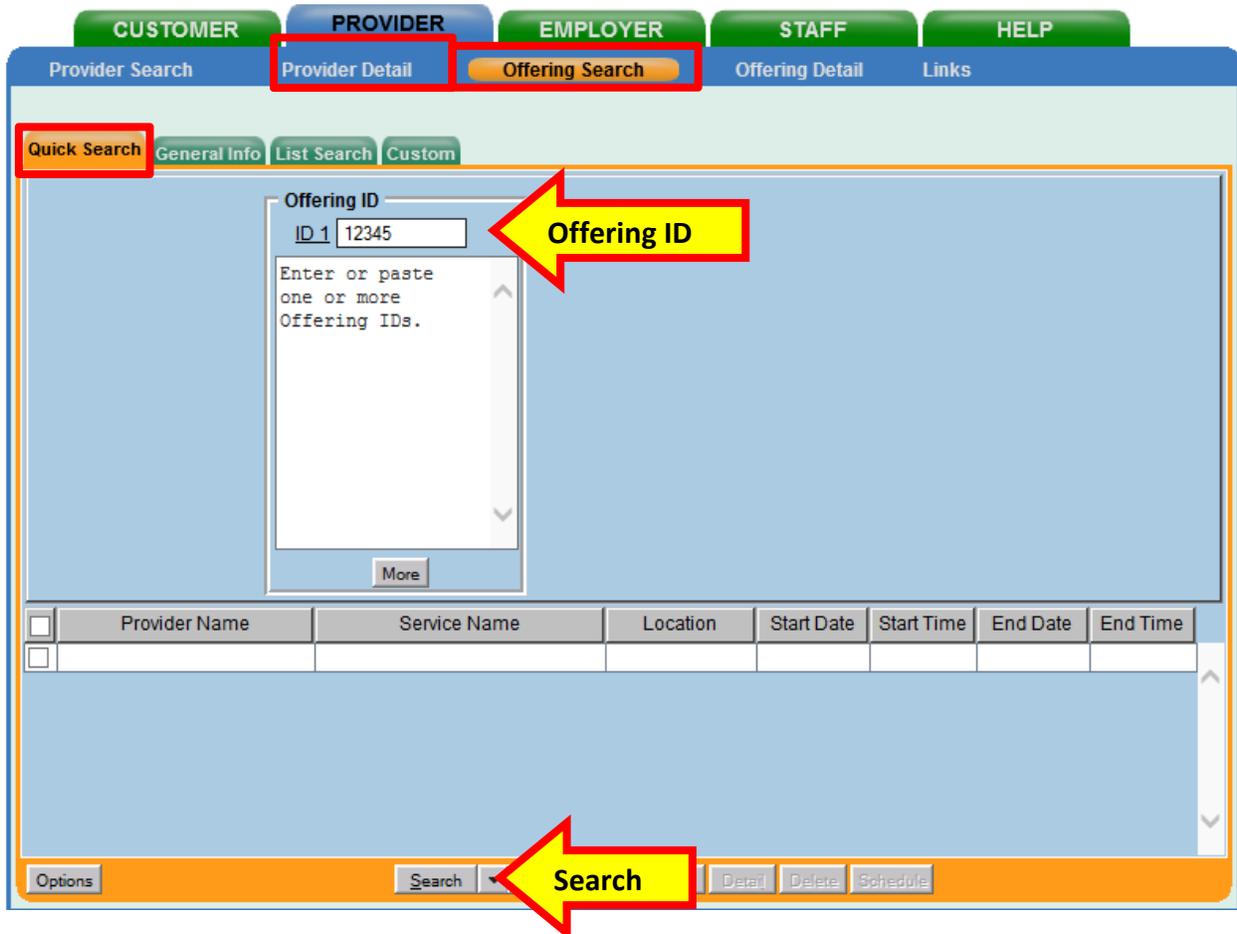
Category	Service Type	Service Name	Description
<input checked="" type="checkbox"/>	Individualized Care On-the-Job Training	CNC Machine Operator Training	CNC Machine Operator OJT

CREATING AN OFFERING

The training/service offered by the provider, combined with the location where the training/service is provided, is identified in OSOS as the **Offering**.

As with the Provider Record, you should first search OSOS to determine if the offering already exists in the system.

To do this, navigate to the **Offering Search** window of the **Provider** module. If you know the **Offering ID** number, you can type it in the search box on the **Quick Search** tab and click **Search**.

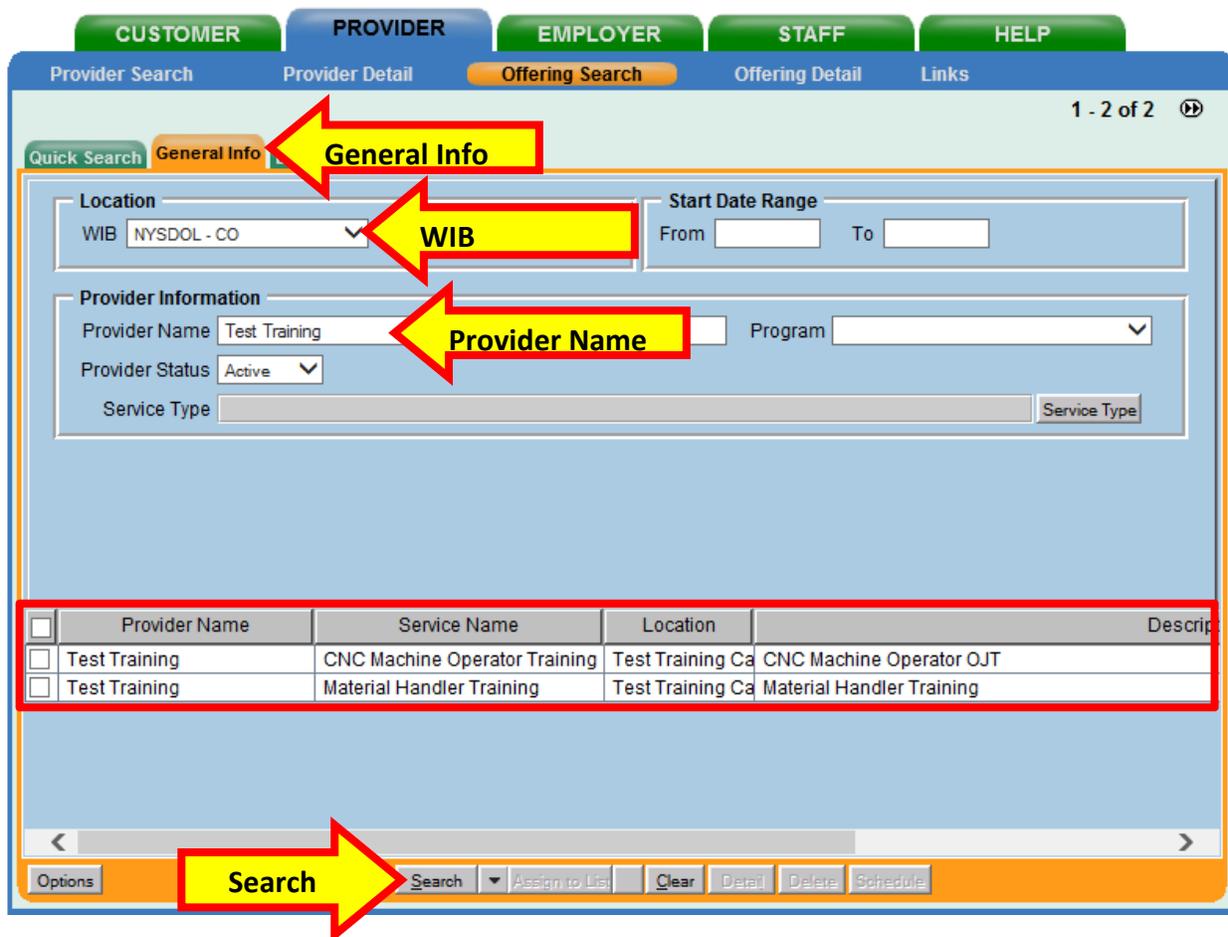


The screenshot shows the OSOS interface for searching offerings. The main navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Under the PROVIDER tab, there are sub-tabs for Provider Search, Provider Detail, Offering Search, Offering Detail, and Links. The Offering Search sub-tab is selected. Within this sub-tab, there are further options: Quick Search, General Info, List Search, and Custom. The Quick Search option is highlighted. A search box labeled 'Offering ID' contains the text 'ID 1 12345'. Below the search box is a text area with the instruction 'Enter or paste one or more Offering IDs.' and a 'More' button. Below the search area is a table with the following columns: Provider Name, Service Name, Location, Start Date, Start Time, End Date, and End Time. The table is currently empty. At the bottom of the interface, there is a 'Search' button, which is highlighted with a yellow arrow and the text 'Search'. Other buttons at the bottom include 'Options', 'Detail', 'Delete', and 'Schedule'.

If you do not know the Offering ID number, click on the **General Info** tab to conduct a name search. In the **Location** section, the **WIB** will autofill based on the office the user is currently assigned to. If the training is being provided in a neighboring LWDA, staff must use the drop-down arrow to select the appropriate **WIB**.

Enter the **Provider Name** and click **Search**.

Services for this Provider that have offerings attached will display in the bottom section of this screen. If your search returns only one result, OSOS will navigate directly to the **Offering Detail** window for that search result.



The screenshot shows the OSOS interface for searching providers. The 'PROVIDER' tab is selected. The 'Offering Search' sub-tab is active. The 'General Info' section contains the following fields:

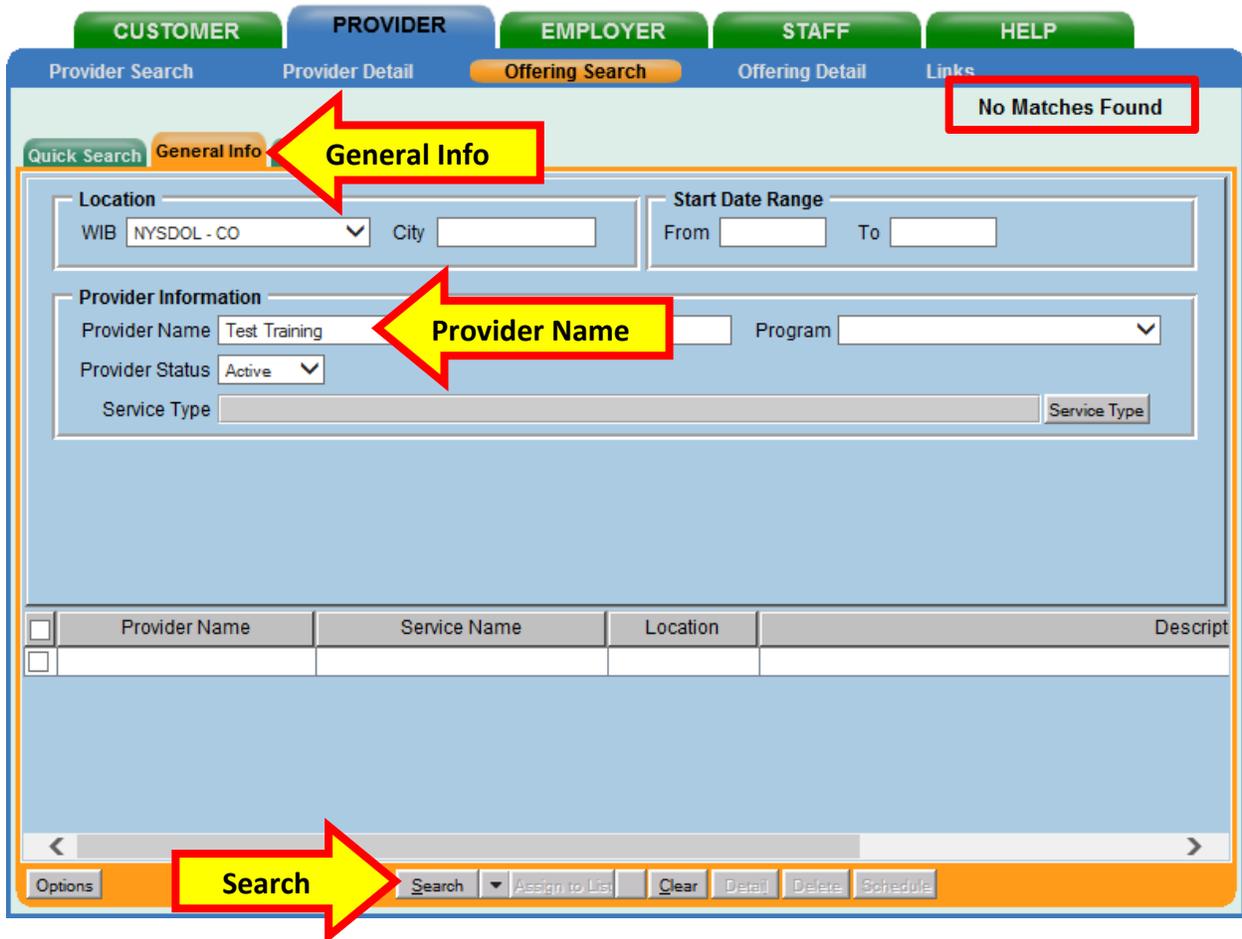
- Location:** WIB NYSDOL - CO (dropdown menu)
- Start Date Range:** From [] To []
- Provider Information:**
 - Provider Name:** Test Training
 - Provider Status:** Active (dropdown menu)
 - Service Type:** []

Below the form is a table of search results:

<input type="checkbox"/>	Provider Name	Service Name	Location	Descrip
<input type="checkbox"/>	Test Training	CNC Machine Operator Training	Test Training Ca	CNC Machine Operator OJT
<input type="checkbox"/>	Test Training	Material Handler Training	Test Training Ca	Material Handler Training

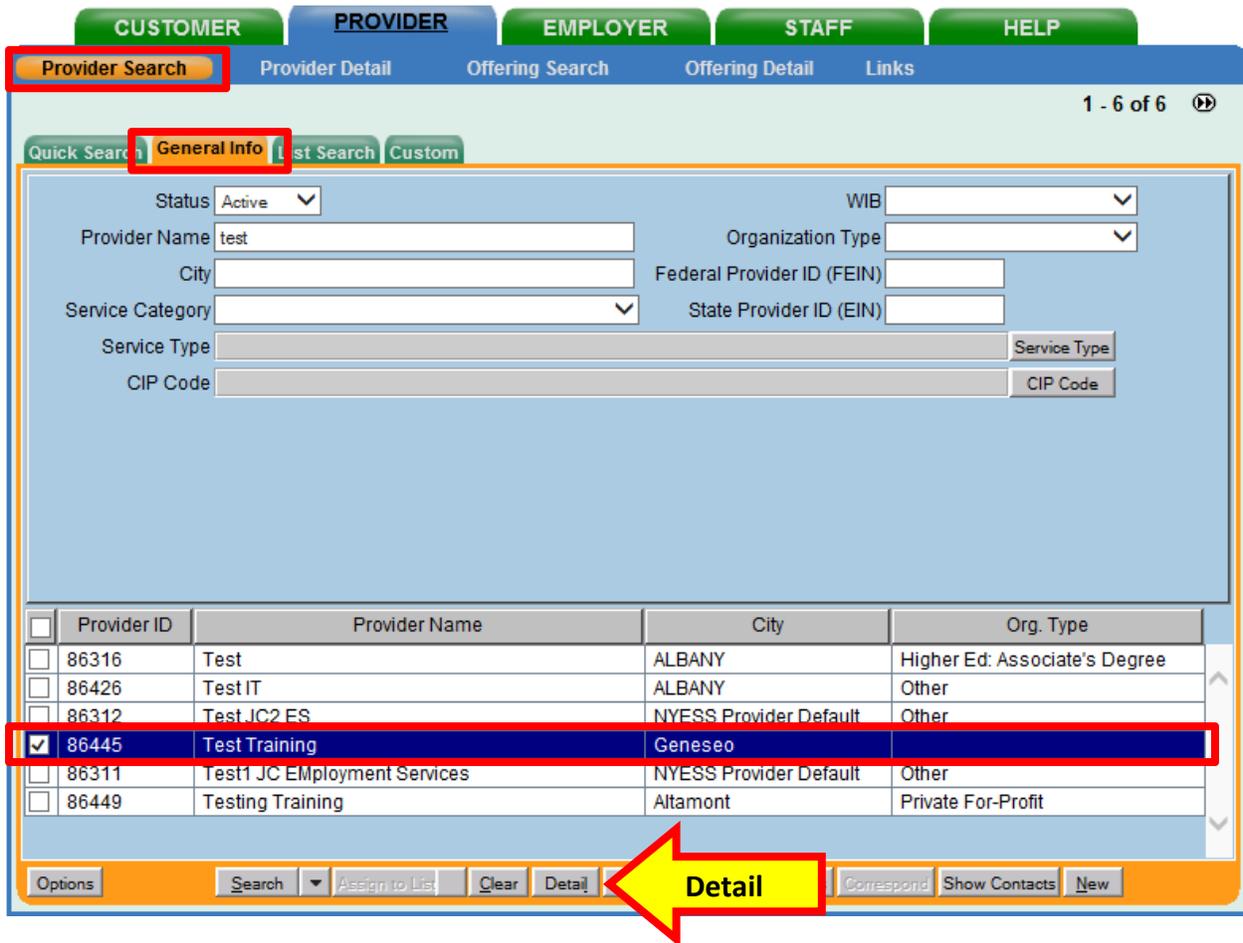
At the bottom of the interface, there is a 'Search' button and a row of action buttons: Search, Assign to List, Clear, Detail, Delete, and Schedule.

If your search returns no results, you will see the “**No Matches Found**” message at the top right. If no matches are found, you will need to create the offering for this provider.



The screenshot shows the OSOS web application interface for searching offerings. At the top, there are navigation tabs: CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. Below these are sub-tabs: Provider Search, Provider Detail, Offering Search (selected), Offering Detail, and Links. A red box highlights the message "No Matches Found" in the top right corner. The main search area is titled "Quick Search" and has a "General Info" tab selected. A yellow arrow points to this tab. The search filters include: Location (WIB NYSDOL - CO, City), Start Date Range (From, To), Provider Information (Provider Name: Test Training, Program, Provider Status: Active, Service Type), and a Search button. A yellow arrow points to the Search button. Below the filters is a table with columns: Provider Name, Service Name, Location, and Description. The table is currently empty. At the bottom, there are buttons for Options, Search, Assign to List, Clear, Detail, Delete, and Schedule. A yellow arrow points to the Search button.

Navigate back to the **Provider Search** window, click on the **General Info** tab and search for the provider that you wish to add the offering to. If the search returns only one provider, OSOS will navigate directly to it. If there is more than one provider listed, select the correct provider and click **Detail**.



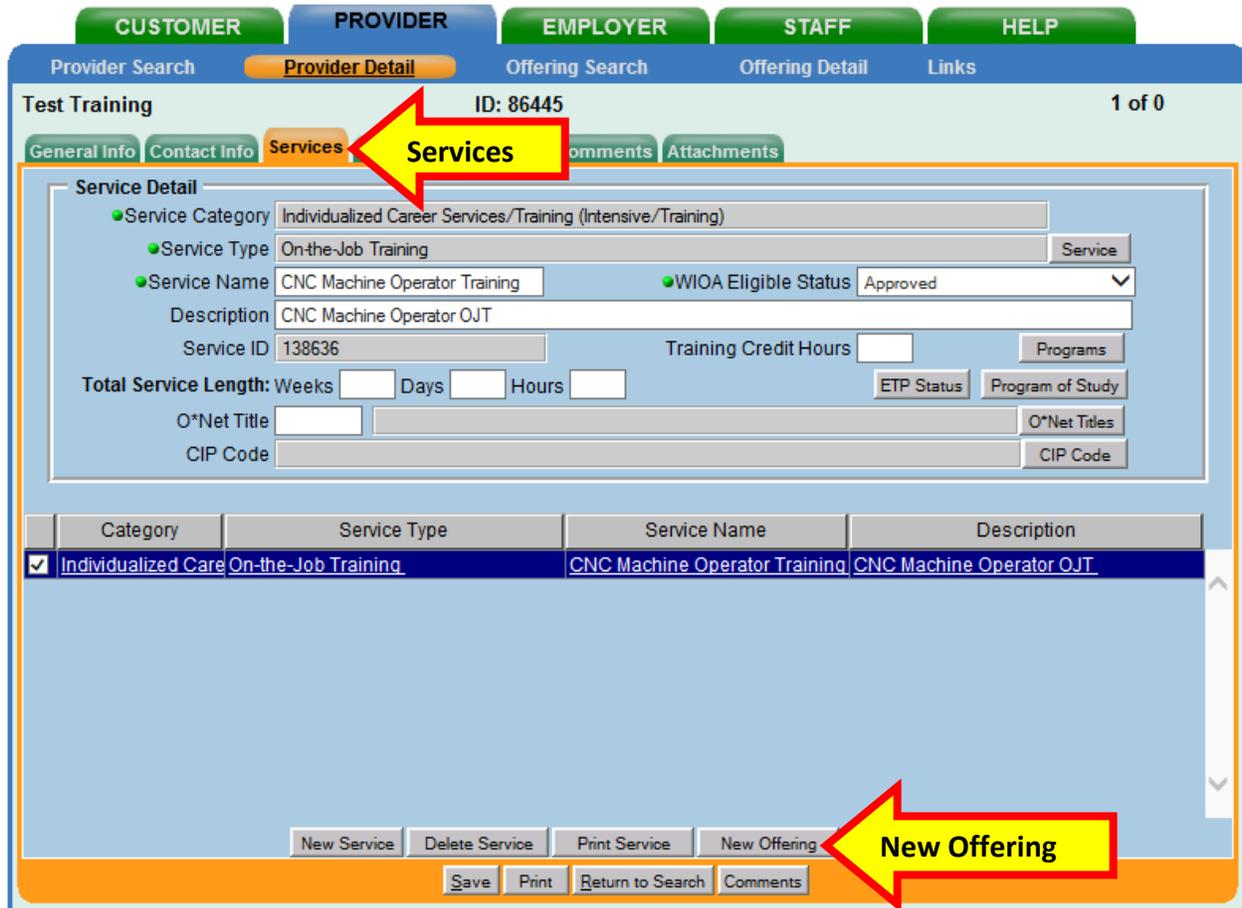
The screenshot shows the OSOS interface with the following elements:

- Navigation tabs: CUSTOMER, PROVIDER (selected), EMPLOYER, STAFF, HELP.
- Sub-tabs: Provider Search (selected), Provider Detail, Offering Search, Offering Detail, Links.
- Search filters: Quick Search, General Info (selected), List Search, Custom.
- Form fields: Status (Active), Provider Name (test), City, Service Category, Service Type, CIP Code, WIB, Organization Type, Federal Provider ID (FEIN), State Provider ID (EIN).
- Table of results:

Provider ID	Provider Name	City	Org. Type
<input type="checkbox"/> 86316	Test	ALBANY	Higher Ed: Associate's Degree
<input type="checkbox"/> 86426	Test IT	ALBANY	Other
<input type="checkbox"/> 86312	Test IC2 ES	NYESS Provider Default	Other
<input checked="" type="checkbox"/> 86445	Test Training	Geneseo	
<input type="checkbox"/> 86311	Test1 JC Employment Services	NYESS Provider Default	Other
<input type="checkbox"/> 86449	Testing Training	Altamont	Private For-Profit
- Buttons at the bottom: Options, Search, Assign to List, Clear, Detail (highlighted with a yellow arrow), Correspond, Show Contacts, New.

Then click on the **Services** tab in the **Provider Detail** window.

Select the service you wish to create the offering for and click the **New Offering** button.



The screenshot shows the OSOS interface for a Provider Detail window. The top navigation bar includes tabs for CUSTOMER, PROVIDER, EMPLOYER, STAFF, and HELP. The PROVIDER tab is active, and the 'Provider Detail' sub-tab is selected. The main content area is titled 'Test Training' with ID: 86445. Below this, there are tabs for General Info, Contact Info, Services, Comments, and Attachments. The 'Services' tab is highlighted with a red arrow pointing to it. The 'Service Detail' section contains several fields: Service Category (Individualized Career Services/Training (Intensive/Training)), Service Type (On-the-Job Training), Service Name (CNC Machine Operator Training), Description (CNC Machine Operator OJT), Service ID (138636), Training Credit Hours, Total Service Length (Weeks, Days, Hours), O*Net Title, and CIP Code. Below the form is a table with columns for Category, Service Type, Service Name, and Description. The first row is selected and highlighted in blue, showing 'Individualized Care On-the-Job Training' for the Service Type and 'CNC Machine Operator Training' for the Service Name. At the bottom of the window, there are buttons for 'New Service', 'Delete Service', 'Print Service', and 'New Offering'. A red arrow points to the 'New Offering' button.



Select the appropriate business, WIB or training provider from the **Location** drop down menu, if more than one exists. This is the location at which the service is offered.

Check the box for Monday as the day of the week that the training will start, regardless of when the training will actually start.

Do not enter the **Start Date**, **End Date**, **End Time**, check any other days of the week, or enter any number into the **Total Seats** or **Available Seats** data fields.

Enter \$1.00 in the **Cost** field.

In the **Description** field, enter a brief description of the specific training.

Click the **Save Single** button.

Record Saved will display briefly in the top right of the screen. Now the offering can be attached to a customer record.

The screenshot shows the 'Offering Detail' page for 'CNC Machine Operator Training' with Offering ID 139203. A 'Record Saved' notification is visible in the top right. The form is divided into several sections:

- Provider Info:** Provider Name: Test Training; Service Category: Individualized Career Services/Training (Intensive/Training); Service Type: On-the-Job Training; Service Description: CNC Machine Operator OJT; Pay for Performance: [checkbox]; ETP Status: [checkbox].
- Location:** Location: Test Training Campus; Address: 123 Broadway; City: Geneseo; State: New York; Zip: 14454; WIB: NYSDOL - CO.
- Schedule:** Start Date: [text]; End Date: [text]; Start Time: [text]; End Time: [text]; Sun: [checkbox]; Mon: [checkbox]; Tue: [checked]; Wed: [checkbox]; Thu: [checkbox]; Fri: [checkbox]; Sat: [checkbox].
- ETP Program of Study Leading to:** Industry Recognized Certification; Registered Apprenticeship; State or National License; Associate Degree; Bachelor's Degree; Community College Certificate; Secondary School Diploma or Equivalent; Employment; Measurable Skill Gain.
- Additional Info:** Cost: \$ 1.00; Total Seats: [text]; Available Seats: [text]; Description: On-the-job training to develop skills in CNC machinery operation.

Annotations on the screenshot include:

- A yellow arrow pointing to the 'Cost' field with the text '\$1.00'.
- A yellow arrow pointing to the 'Description' field with the text 'Description'.
- A yellow arrow pointing to the 'Save Single' button with the text 'Save Single'.



RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found at:

<http://labor.ny.gov/workforcenypartners/osos.shtm>

For further assistance, please contact the OSOS Help Desk:

By phone: (518) 457-6586

By email: help.osos@labor.ny.gov