



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 autoloaded, 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.

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

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Options	Search V Assign to List Clear Detail Delete Selection Comments Co	New New



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.

PROVIDER CUSTOMER EMPLOYER STAFF HELP Provider Search **Provider Detail Offering Search Offering Detail** Links ID: 1 of 0 **Test Training** General Info (ontact Info Services Service Performance Comments Attachments Provider Info Locations Provider Status Active Location Name Test Training Campus \sim Federal ID (FEIN) Street Address (line1) 123 Broadway Street Address (line2) State ID (EIN) Organization Type City Geneseo Provider Name Test Training State New York V Provider Phone 518-555-5555 Zip Code 14454 Ext Provider URL Location Suffix Provider Email WIB NYSDOL - CO V Pay for Performance Location Test Training Campus Billing Address Street Address (line1) 123 Broadway Street Address (line2) City Geneseo State New York V Zip Code 14454 **Copy Address** Copy Address New Location Save Comments Save

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



Click on the **Contact Info** tab.

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

Click Save.

CUSTOMER	PROVIDER	EMPLOYER	STAFF	HEL	P
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Contact Detail			Lists		
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 Last Name 	Smith				
Title	Administrator				
Location	Test Training Campus	<u> </u>			
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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.

CUSTOMER	PROVIDER	EMPLOYER	STAFF	HELP	
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New Service	New Service Delete Servic	e Print Service	New Offering Show	Deletes	
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Click **Service** on the right to search for and add a service type.

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Service ID		Trai	ning 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		23
Service Category/Type Selector		
L2 NEG Specific Services		
L2 State Funded Programs		
L2 Trade Act		
L2 Training		
Cocupational Skills Training Element		
Individualized Career Services/Training (Intensive/Training)		
Academic Learning		
On-the-Job Training		
PROMISE		
PROMISE Parent Center (ONLY)		
Keyword(s) Search OK	ОК	



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**.

Provider Search Provider Detail Offering Search Offering Detail Links Test Training ID: 86445 1 of 0 General Info Contact Info Service Performance Comments Attachments Service Detail Service Category Individualized Career Services/Training (Intensive/Training) Service Name On-the-Job Training WIOA Eligible Status Approved Service Name CAC Machine Operator Training WIOA Eligible Status Approved Vervice Length: Weeks Days Hours Of Net Title Of Net Title Of Net Title Of Net Title CIP Code CiP Code CIP Code CIP Code Variable Service Type Service Name Description Out Net Title Of Net Title Or Net Title Of Net Title Of Net Title Of Net Title Or Net Title Of Net Title Of Net Title Or Net Title On the-Job Training CNC Machine Operator OJT Of Net Title New Service Delete Service Prov Offering Service Name Description New Service Delete Service Print Service Service Name Service Name Service	Provider Search Provider Detail Offering Search Offering Detail Links Test Training ID: 86445 1 of 0 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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**.

CUSTOMER	PROVIDER	EMPLOYER	STAFF	HEI	_P
Provider Search P	rovider Detail 🦷	Offering Search	Offering Detail	Links	
Quick Search General Info	st Search Custom				
	Offering ID ID 1 12345 Inter or paste ne or more ffering IDs.	Offering I	>		
Provider Name	Service Na	ame Loca	ation Start Date	Start Time End	Date End Time
					~
Options	<u>S</u> earch	Search	Detail Delete S	chedule	
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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.

	CUSTOMER	PROVIDER	OYER	STAFF	HEL	P	
	Provider Search Pro	wider Detail 🛛 🚺 Offering Se	arch Of	ffering Detail	Links		
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	Provider Information Provider Name Test Trainin Provider Status Active	Provider Na	me	Program		V Service Type	
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	Test Training	Material Handler Training	Test Training Ca	Material Handler	Training		
Or	C Search	Search V Assign to Lis	t <u>C</u> lear Detr	il Delete Schedu	/e		>



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.

CUSTOMER	PROVIDER	EMPLOYER	STAFF	HELP
Provider Search Pro	ovider Detail 🛛 🧧	Offering Search	Offering Detail	Lipks
				No Matches Found
Quick Search General Info	General Info			
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Provider Name	Service Na	me Locatio	n [Descript
<	<u> </u>			>
Options Search	<u>S</u> earch	Assign to List Clear	Detail Delete Schedul	



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**.

CUSTOME	R PROVIDER	EMPLOYE	ER STAFF	HELP
Provider Search	Provider Detail	Offering Search	Offering Detail Li	inks
				1-6 of 6 🕑
Quick Search General	Info I st Search Custor	n		
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Service Category		~	State Provider ID (EIN)	
Service Type				Service Type
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Options	Search 💌 Assign to List	<u>C</u> lear Detai	Detail Com	spond Show Contacts <u>N</u> ew



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.

CUSTOMER	PROVIDER	EMPLOY	ER STAFF		HELP	
Provider Search 🧲	Provider Detail	Offering Searc	h Offering Deta	ail Links		
Test Training		D: 86445			1 0	of 0
General Info Contact Info	Services Service	ces ommen	ts Attachments			
Service Detail						
 Service Category 	Individualized Career Servi	ces/Training (Intensiv	ve/Training)			
 Service Type 	On-the-Job Training				Service	
 Service Name 	CNC Machine Operator Tr	aining	 WIOA Eligible Status 	Approved	~]
Description	CNC Machine Operator OJ	IT				
Service ID	138636		Training Credit Hours	;	Programs	
Total Service Length:	Weeks Days	Hours		ETP Status	Program of Study	
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μ						
Category	Service Type		Service Name	D	escription	
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	New Service Delete	Service Print Ser	rvice New Offering	New Off	ering	
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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.

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RESOURCES AND ASSISTANCE

Additional program information, OSOS guides and other resources can be found at: <u>http://labor.ny.gov/workforcenypartners/osos.shtm</u>

For further assistance, please contact the OSOS Help Desk: By phone: (518) 457-6586 By email: <u>help.osos@labor.ny.gov</u>